

Colombia

Tourism in the economy and outlook for recovery

The tourism sector is an important contributor to Colombia's economy. In 2019, tourism directly contributed 2.6% to Colombia's GVA, or COP 25.3 billion. This fell to just 1.6% in 2021 as the tourism GVA fell to COP 16.7 billion. Tourism industries employed 489 588 people in 2021, a decline of 300 794 jobs compared to 2019 according with the Tourism Satellite Account.

Tourism has become the primary services export in Colombia and the second-highest overall export behind the oil industry. In 2021, export services in tourism amounted to USD 3 239 million, a 47.7% decrease with respect to 2019 (USD 6 784 million). However, the first semester of 2022 saw a total recovery with tourism exports at USD 3 207 million (compared to USD 3 170 million in the same period of 2019).

The country received 2.1 million international visitors in 2021, a 56% increase with respect to 2020. Between January and September 2022, with 3.2 million visitors, there was a 97% recovery compared to the same period of 2019. During that period, visitors increased from the United States (up 23.7%), Mexico (up 17.1%), Peru (up 3.9%) and Ecuador (up 36.0%).

In terms of recovery, tourism is expected to be at 2019 levels by the end of 2022.

Tourism governance and funding

The guidelines for tourism are based on the National Development Plan (NDP), which changes every four years with the President. Under the NDP, the Ministry of Commerce, Industry and Tourism (MINCIT) creates the Sectoral Plan for Tourism. An Integrated Destination Management Strategy allows for cross governmental co-ordination in the planning and management of activities, resources and stakeholders involved in tourism development.

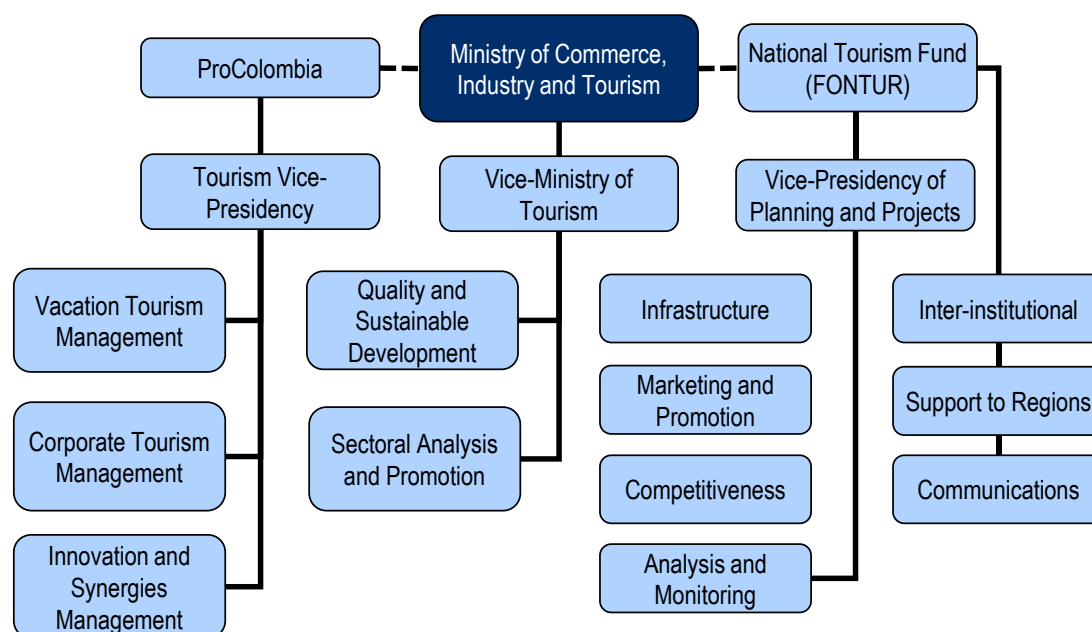
At the national level, MINCIT works with three main organisations:

- FONTUR: the National Tourism Fund affiliated with the Ministry.
- PROCOLOMBIA: the agency charged with international promotion; expansion of Colombian companies; attraction of foreign direct investment; positioning of the country as a tourism destination; and the country's brand.
- Colombia Productiva: helps industry and companies produce better quality services and greater added value to increase productivity and competitiveness.

MINCIT works with other ministries (e.g. Ministry of Environment and Sustainable Development, Ministry of Culture, National Planning Department) and consults stakeholders and representatives from the private sector on all policies and strategies. At the regional level, activities are decentralised, and implementation is co-ordinated with regional authorities and local communities. Local authorities for tourism promote the tourism industry in each territory.

Funding for the tourism sector comes from the general budget, compulsory contributions from tourism service providers, income from tourism properties and brands owned by the government, and a USD 15 tourism tax on international arrivals by air. The tourism sector had a total budget of COP 288.3 million in 2021, 25% more than in 2020. The Vice-Ministry of Tourism received over COP 169 million (60% of the general budget) in 2021, 28% more than in 2020 and 124% more than in 2019.

Colombia: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Commerce, Industry and Tourism, 2022.

Tourism policies and programmes

In recent years, and more so during the pandemic, Colombia considers sustainable tourism a responsibility and an opportunity. It has developed the Sustainable Tourism Policy “Together with Nature” as a long-term strategic vision for the sector. The Policy seeks to unite all industry stakeholders towards the goal of developing sustainable tourism and consists of a strategic plan for 2030 comprised of six strategies consistent with the global Agenda for Sustainable Development.

Under the Policy, Colombia developed the strategy “Colombia Sustainable Tourism: Training for Tourism Entrepreneurs and Businesses”. The Strategy has three fundamental activities:

- An e-learning platform, with practical, digital and interactive content to acquire knowledge and skills and learn from successful sustainability case studies. More than 2 000 entrepreneurs have registered on the platform and are undertaking the modules.
- A manual of good practices in sustainability for tourism entrepreneurs has also been developed with tools to identify the environmental impacts of tourism and the actions to take for mitigation and compensation.
- 50 virtual and in-person workshops are being run in the 32 departments of the country to disseminate the main components of the strategy.

Colombia's main federal policy priorities for tourism are sustainability, reactivation of the economy, and developing a long-term integrated strategy. Due to COVID-19, Colombia prioritised supporting the recovery and strengthening the resilience of the tourism economy. The new General Law of Tourism, created in 2020, aims to help economic recovery through short, medium and long-term measures (see box below).

The COVID-19 crisis highlighted the gap between formal and informal workers in the sector and the government's capacity to react and adapt when different support mechanisms are required to support vulnerable communities. Colombia aims to increase the percentage of workers in the formal sector to advance programmes that can benefit them.

Colombia has begun a transition to reduce the negative impacts of tourism and protect its ecosystems, communities and diversity to develop a sustainable, responsible and peaceful sector. This policy is being guided by the many local communities in the country. This includes worked with indigenous representatives to develop the first Indigenous Tourism Policy. This aims to increase participation and improve social and economic development of indigenous communities, while enhancing the protection of their heritage, culture and traditions.

Colombia is also working with the United Nations Environment Programme and the World Wildlife Fund to design a practical training course on sustainable gastronomy for the tourism sector, with a corresponding guide for restaurants and lodgings. This course promotes the sustainable use of food procurement and production, the continuous monitoring of food waste and its proper disposal, and the strengthening of the local production chain of organic products. There are over 1 710 participants on the platform.

General Law of Tourism to mitigate impacts and support recovery in Colombia

In 2020, the new General Law of Tourism was created to help the economic reactivation of the sector. It includes a combination of short, medium and long-term measures developed around building confidence, resilience, and sustainability. The Law is focused on four main points: sustainability, quality, training, and reactivation.

Within the Law, there are several financial measures designed to help the reactivation of the sector. This includes tax exemptions or reductions for hotels and tourism services, the sale of food and beverages, and passenger air tickets. The Law temporarily suspended energy surcharge payments for certain tourism service providers and provided subsidies to air transportation providers to promote air travel services in regions with low accessibility and connectivity.

On sustainability, the law provides rent discounts for investments made in environmental control, conservation, improvement, and measures to counteract coastal erosion. To attract investment to boost tourism and encourage projects focused on senior citizens, the Law also provides a ten-year preferential rate on income for assistance centres for elderly tourists.

Statistical Profile

Colombia: Domestic, inbound and outbound tourism

	2017	2018	2019	2020	2021
TOURISM FLOWS, THOUSAND					
Domestic tourism					
Total domestic trips	78 334	81 084	83 856	32 436 p	42 974 p
Overnight visitors (tourists)	43 846	45 280	46 279	19 419 p	25 660 p
Same-day visitors (excursionists)	34 488	35 804	37 577	13 017 p	17 314 p
Nights in all types of accommodation	212 355	219 303	219 816	123 614 p	138 843 p
Hotels and similar establishments	..	..	..	..	..
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
Inbound tourism					
Total international arrivals	4 056	4 398	4 531	1 396	2 179 p
Overnight visitors (tourists)	..	..	..	..	..
Same-day visitors (excursionists)	..	..	..	..	..
Top markets					
United States	529	648	705	230	517 p
Venezuela	371	399	400	112	182 p
Mexico	172	182	198	52	81 p
Peru	141	151	181	48	67 p
Ecuador	169	164	159	38	58 p
Nights in all types of accommodation	..	..	..	..	..
Hotels and similar establishments	..	..	..	..	..
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
Outbound tourism					
Total international departures	4 017	4 368	4 479	1 275	2 276 p
Overnight visitors (tourists)	..	..	..	..	..
Same-day visitors (excursionists)	..	..	..	..	..
Top destinations					
United States	1 242	1 383	1 410	485	1 252 p
Mexico	396	461	499	139	300 p
Spain	362	427	489	105	143 p
Panama	424	404	396	103	107 p
Ecuador	301	300	285	78	39 p
TOURISM RECEIPTS AND EXPENDITURE, MILLION USD					
Inbound tourism					
Total international receipts	5 899	6 655	6 784	1 945	..
International travel receipts	4 921	5 621	5 682	1 581	..
International passenger transport receipts	978	1 034	1 102	364	..
Outbound tourism					
Total international expenditure	5 135	5 531	5 658	1 540	..
International travel expenditure	4 475	4 784	4 935	1 358	..
International passenger transport expenditure	661	747	723	182	..

.. Not available; p Provisional data

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/pes902>

Colombia: Enterprises and employment in tourism

	Number of establishments	Number of persons employed				
	2021	2017	2018	2019	2020	2021
Total	..	..	..	..	..	..
Tourism industries	47 099 p	708 121	686 192	790 382	411 253 p	489 588 p
Accommodation services for visitors	..	323 057	308 307	349 466	189 156 p	220 985 p
Hotels and similar establishments	30 457 p	..	..	..	..	..
Food and beverage serving industry	1 272 p	..	..	..	..	..
Passenger transport	..	232 869	229 857	271 634	100 982 p	131 882 p
Air passenger transport	..	..	..	..	..	..
Railways passenger transport	..	..	..	..	..	..
Road passenger transport	828 p	..	..	..	..	..
Water passenger transport	..	..	..	..	..	..
Passenger transport supporting services	..	..	..	..	..	..
Transport equipment rental	325 p	..	..	..	..	..
Travel agencies and other reservation services industry	9 831 p	33 605	29 340	29 976	22 895 p	18 859 p
Cultural industry	..	..	..	..	..	..
Sports and recreation industry	..	93 687	91 204	113 681	90 094 p	108 103 p
Retail trade of country-specific tourism characteristic goods	..	..	..	..	..	..
Other country-specific tourism industries	4 386 p	24 903	27 485	25 626	8 126 p	9 758 p
Other industries	..	..	..	..	..	..

.. Not available; p Provisional data

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/v9fplo>


Colombia: Internal tourism consumption

Million COP

	2021		
	Domestic tourism expenditure	Inbound tourism expenditure	Internal tourism consumption
Total	..	..	..
Consumption products	..	..	..
Tourism characteristic products	9 162 183 p	16 169 208 p	25 331 391 p
Accommodation services for visitors	1 031 613 p	2 098 500 p	3 130 113 p
Food and beverage serving services	2 701 510 p	4 949 010 p	7 650 520 p
Passenger transport services	..	..	..
Air passenger transport services	1 061 948 p	1 675 596 p	2 737 543 p
Railways passenger transport services	..	..	..
Road passenger transport services	1 133 829 p	2 494 577 p	3 628 406 p
Water passenger transport services	..	..	..
Passenger transport supporting services	..	..	..
Transport equipment rental services	21 166 p	.. p	21 166 p
Travel agencies and other reservation services industry	84 664 p	70 913 p	155 577 p
Cultural services	431 554 p	1 260 707 p	1 692 261 p
Sports and recreation services	..	..	..
Country-specific tourism characteristic goods	1 254 143 p	3 238 283 p	4 492 426 p
Country-specific tourism characteristic services	1 441 758 p	381 621 p	1 823 379 p
Other consumption products	..	..	..
Tourism connected products	..	..	..
Non-tourism related consumption products	..	..	..
Non-consumption products	..	..	..

.. Not available; p Provisional data

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/drq4bk>



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