

Colombia

Tourism in the economy

Tourism contributed COP 14.1 billion to the Colombia economy in 2014, equivalent to 2.7% of total GDP. It is the country's biggest service export and the third largest sector in the economy, behind oil and coal. Tourism directly supports 1.8 million jobs, or 8% of total employment.

In 2014, Colombia received 4.2 million international tourists, an increase of 11.9% on 2013. The United States is the main source market, followed by Venezuela, Ecuador, Brazil and Argentina. Just over 20.1 million domestic trips were recorded in 2014, up 6.3% on 2013.

Colombia has become an attractive country for foreign investment in tourism. Between 2011 and 2014, investment reached COP 2.2 billion for the construction of 20 557 new and 11 355 refurbished rooms.

Tourism governance and funding

The Ministry of Trade, Industry and Tourism supports the management of tourism in the regions and helps to improve the competitiveness and sustainability of tourism in Colombia. The mission of the Vice-Ministry of Tourism is to work with regions and providers to position Colombia as a sustainable tourism destination known for its diverse and multicultural offer. Its functions are to:

- Agree, implement and evaluate tourism policy and related plans and programmes, in conjunction with relevant public and private sector entities, and thereby improve the competitiveness and sustainability of tourism products and destinations and promote domestic and inbound tourism,
- Adjudicate on complaints related to tourism services and other offences covered by tourism legislation,
- Co-ordinate the National Register of Tourism and certification related to the provision of tourism services,
- Create and ensure the implementation of the Tourism Sector Plan.

The Vice-Ministry works with other entities related to tourism. In 2013, Decree 1837 established the Superior Tourism Council (*Consejo Superior del Turismo*) as the co-ordinating body between state authorities, under the direction of the Ministry. This Council brings together relevant ministries and seeks to co-ordinate the tourism programmes and projects implementing the tourism policy formulated by the Ministry.

Under the General Tourism Law (1996), regional and local authorities are responsible for developing tourism activities in their territories, within the context of national tourism policy. The Ministry co-ordinates tourism planning with the regional and local authorities

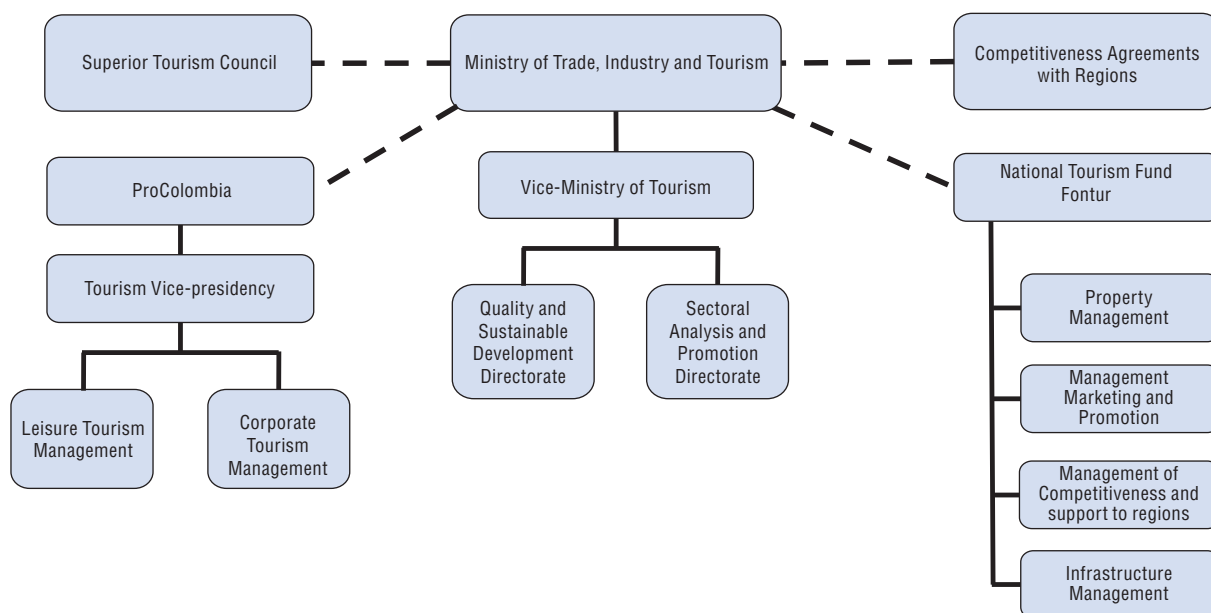
through Competitiveness Agreements, which identify the priorities for joint work over a three-year period.

The National Tourism Fund (*Fondo Nacional de Turismo – Fontur*) is responsible for the collection, management and execution of resources for tourism infrastructure, promotion and tourism competitiveness.

Funding for tourism development comes from a number of sources, including:

- Fiscal resources assigned by the Government from the General Budget to the Ministry of Trade, Industry and Tourism for tourism infrastructure, promotion and competitiveness,
- Obligatory contributions from tourism service providers for the promotion and competitiveness of national tourism destinations,
- Tourism taxes from international visitors entering Colombia by air. The tax rate in 2015 is USD 15 per visitor, with proceeds used to increase competitiveness and for promotion,
- Resources from the management of tourism properties by the State,
- Income from the exploitation of tourism-related brands owned by the Ministry,
- Resources from penalties imposed on tourism service providers for legal infractions.

Colombia: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Trade, Industry and Tourism, 2016.

Tourism policies and programmes

The priority issues for tourism in Colombia are quality, infrastructure, human resources, promotion, connectivity, tourism culture, entrepreneurship and co-ordination with other national entities and local authorities.

The National Development Plan 2014-18 recognises tourism as a priority sector for the national economy and contains tourism actions to support economic goals. The National Tourism Plan 2014-18, *Tourism for Peace Building*, reflects the aspirations incorporated in the National Development Plan and sets the goal of positioning Colombia as a sustainable tourist destination, renowned for its diverse and multicultural offer displayed in highly

competitive products and services that empower the regions in the construction of peace. The vision is that by 2018, the tourism sector will generate 300 000 new jobs and USD 6 billion in foreign currency.

The National Tourism Plan 2014-18 proposes four major strategies to achieve this: competitiveness for regional development, connectivity, promotion and governance. The Plan also includes three horizontal strands: responsible and sustainable tourism, tourism culture, and Peace Tourism.

Specific actions focus on:

- Strengthening world-class destinations: Cartagena Region, San Andrés and Providencia, the Santa Marta-Salamanca-Tayrona Region and the Coffee Cultural Landscape,
- Promoting high value tourism products: nature and adventure tourism; Meetings, Incentives, Conventions and Exhibitions (MICE) tourism; and health and wellness tourism,
- Promoting domestic tourism: Gulf of Morrosquillo, Cluster Melgar-Girardot-Honda and the development of territories in Peace (Putumayo, La Macarena, Urabá-Darien and Sierra Nevada of Santa Marta),
- Promoting tourism products and destinations in Colombia through national and international tourism promotion.

In addition, cross-cutting strategies are developed in the field of standards and security, infrastructure, human talent, investment and financing, and institutional strengthening.

The Ministry has created and follows a Quality Policy, the main objective of which is to improve quality in the provision of tourism services. It seeks to create a culture of excellence amongst tourism service providers and destinations as part of the wider strategy to position Colombia as a distinct, competitive and sustainable destination. Sustainability is one of the main principles of the Quality Policy.

Tourism is declared in law as a national interest activity and requires tourism service providers to be registered to operate. Tourism sectors have also been standardised, with norms for each sector that include sustainability requirements. The sectors include: gastronomy, hotels, travel agencies, tour guides, time-share and sustainable tourism. It is mandatory for tourism service providers to undertake self-assessment in compliance with the norms that apply to their sector. When a tourism provider or destination meets the requirements of the norm, they obtain a certificate of quality tourism. Only those tourism service providers in the National Registry of Tourism will qualify for tax and fiscal incentives.

Statistical profile

Table 1. **Colombia: Domestic, inbound and outbound tourism**

	2010	2011	2012	2013	2014
TOURISM FLOWS, THOUSAND					
Domestic tourism					
Total domestic trips	13 235	13 235	16 104	18 924	20 106
Overnight visitors (tourists)	..	..	..	..	..
Same-day visitors (excursionists)	..	..	..	..	..
Nights in all types of accommodation	..	..	..	..	..
Hotels and similar establishments	..	..	..	..	..
Specialised establishments	..	..	..	..	..
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
Inbound tourism					
Total international arrivals	2 611	3 354	3 492	3 748	4 193
Overnight visitors (tourists)	..	..	..	..	..
Same-day visitors (excursionists)	..	..	..	..	..
Top markets					
United States	357	329	329	344	377
Venezuela	188	215	230	239	273
Ecuador	116	102	107	114	127
Brazil	64	91	83	90	125
Argentina	77	86	10	121	118
Nights in all types of accommodation	..	..	..	..	..
Hotels and similar establishments	..	..	..	..	..
Specialised establishments	..	..	..	..	..
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
Outbound tourism					
Total international departures	3 062	3 424	3 836	4 367	4 917
Overnight visitors (tourists)	..	..	..	..	..
Same-day visitors (excursionists)	..	..	..	..	..
Top destinations					
United States	883	874	978	1 121	1 223
Venezuela	150	171	475	607	496
Panama	283	318	346	342	406
Ecuador	225	231	319	320	329
Spain	184	199	187	190	195
TOURISM RECEIPTS AND EXPENDITURE, MILLION USD					
Inbound tourism					
Total international receipts	3 440	3 801	4 364	4 758	4 887
International travel receipts	2 797	3 010	3 460	3 611	3 825
International passenger transport receipts	644	791	903	1 148	1 062
Outbound tourism					
Total international expenditure	3 188	3 631	4 362	4 484	5 171
International travel expenditure	2 641	3 032	3 626	3 941	4 678
International passenger transport expenditure	547	599	737	544	492

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Source: OECD Tourism Statistics (Database).


StatLink  <http://dx.doi.org/10.1787/888933320762>


Table 2. **Colombia: Enterprises and employment in tourism**

	Number of establishments	Number of persons employed				
	2014	2010	2011	2012	2013	2014
Total	..	..	..	..	..	..
Tourism industries	20 416	1 547 964	1 599 418	1 682 606	1 726 442	1 783 161
Accommodation services for visitors	..	84 835	92 552	93 753	93 743	101 863
Hotels and similar establishments	10 881	..	..	..	..	..
Food and beverage serving industry	945	505 226	553 388	614 602	619 260	633 533
Passenger transport	..	..	..	..	..	..
Air passenger transport	..	..	..	..	..	..
Railways passenger transport	..	..	..	..	..	..
Road passenger transport	294	..	..	..	..	..
Water passenger transport	..	..	..	..	..	..
Passenger transport supporting services	..	584 264	594 569	603 189	616 353	657 991
Transport equipment rental	137	..	..	..	..	..
Travel agencies and other reservation services industry	5 179	24 204	22 069	22 924	31 249	24 094
Cultural industry	..	..	..	..	..	..
Sports and recreation industry	..	..	..	..	..	..
Retail trade of country-specific tourism characteristic goods	..	..	..	..	..	..
Other country-specific tourism industries	2 980	349 435	336 840	348 136	365 837	365 680
Other industries

.. Not available

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Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888933320774>



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