

# Chile

## Tourism in the economy

Tourism in Chile has experienced a sustained increase in recent years and has become one of the fastest growing sectors of the economy.

It has been estimated that tourism is directly responsible for 3.4% of Chile's GDP and 5.1% of employment. Tourism accounts for 4.4% of total exports and 32.6% of exports of services.

Inbound tourism has increased from 1.8 million in 2004 to more than 5.6 million in 2016. Annual growth between 2015 and 2016 amounted to 26%, with a further 20% anticipated in 2017. The main markets are Argentina, Brazil, Bolivia, Peru and the United States.

Domestic tourism flows have also been increasing, with 10% growth in the last four years to almost 29 million trips.

In 2016 domestic receipts accounted for an estimated USD 5.4 billion, while inbound tourism accounted for USD 3.1 billion (including visitors and international transport).

## Tourism governance and funding

Tourism in Chile comes under the responsibility of the Under-Secretary for Tourism within the Ministry of Economy, Development and Tourism.

The Under-Secretary, is in charge of defining and implementing the national tourism policy and strategies. The Under-Secretary is supported in this role by the Ministerial Committee on Tourism, which advises the President of the Republic on matters of tourism, and the Consultative Council for Tourism Development, which advises and collaborates with the Ministerial Committee on national and international promotion policy. The Under-Secretary's responsibility is to encourage the development of the sector, encourage investment, create jobs, reduce tourism seasonality and further the decentralization of tourism in the country.

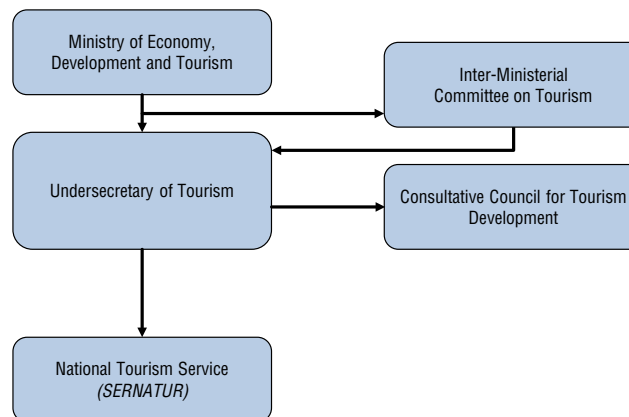
The National Tourism Service (SERNATUR) has the responsibility of executing tourism policy and strategies.

Regional government together with the Regional Offices of the Tourism Service can promote and develop tourism-related activities in their respective regions. Tourism initiatives have to compete with other sectors for the regional budget.

The budget of the National Tourism Service is around USD 42.4 million in 2017 (up from USD 41.8 million in 2016).

The Under-Secretary for Tourism was provided in 2015 with a budget of USD 100 million for supporting short, medium and long term actions to implement the National Plan for Sustainable Tourism Development 2014-18. The operational budget for 2017 is around USD 13.9 million, an increase of nearly 50% over the 2015 budget.

### Chile: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Economy, Development and Tourism, 2018.

## Tourism policies and programmes

The key priorities and opportunities for tourism in Chile are identified in the National Plan for Sustainable Tourism Development 2014-18.

The main priorities are to promote sustainable development of the sector through actions in prioritised destinations, to increase recognition of tourism as an important economic sector and to improve the competitive position of Chile. Specific goals are to:

- Develop new and innovative tourism experiences, considering cultural and identity elements,
- Encourage more Chileans to travel, know and enjoy Chile, delivering both social and economic benefits (Box 1.17),
- Capture more value from tourism, through actions to improve the offer and promotion in prioritised international markets,
- Strengthen the sustainable development of destinations, from an integrated territorial approach that promotes the engagement of local and regional actors (Box 3.9).

The above goals are being addressed through the ten-year public-private *Transforma Turismo* programme. Its objective is to transform Chile into a sustainable, diverse and sophisticated international tourism destination, with a tourism offer based on its natural and cultural resources and achieving significant growth in the average value generated per tourist.

A diagnosis and Road Map for implementation of the programme was developed with the participation of a wide group of state entities, tourist entrepreneurs, academics and other tourism-related bodies. The programme has subsequently focused in the following two areas:

- Improvement of five types of prioritised tourism experience in which Chile has comparative advantage: nature and adventure tourism (with emphasis on wild protected areas); astronomical tourism; wine tourism; indigenous tourism; and cultural, event and gastronomy tourism.
- Development of tourist destinations, improving their management, sustainability and connection (with each other and with their environment), with the purpose of generating environments that give greater competitiveness to tourism products and companies that participate in the tourism value chain. It considers actions in ten

selected destinations (among the 83 tourist destinations prioritized by the Under-Secretariat of Tourism in the National Plan).

According to the Tourism Law, the Under-Secretary can propose to the Committee of Ministers the declaration of Areas of Tourist Interest. These are territories that have special conditions for attracting tourists and that require conservation measures and integrated planning to promote investment by the private sector.

In 2016, Chile was recognised as the best adventure tourism destination in the world. This reflects the great potential of Chile's natural resources and the work undertaken in the last three years around protected wilderness areas. Consideration is being given to the prioritisation of some National Parks or National Reserves for the development of sustainable tourism together with the surrounding communities. To date, a total of eight parks have been prioritised by the Committee of Ministers. However, the Action Plan prepared by the Under-Secretariat of Tourism, in conjunction with the National Forestry Corporation, includes actions in 20 Protected Areas of the State.

## Statistical profile

Table 1. Chile: Domestic, inbound and outbound tourism

	2012	2013	2014	2015	2016
<b>TOURISM FLOWS, THOUSAND</b>					
<b>Domestic tourism</b>					
Total domestic trips	..	..	..	..	..
Overnight visitors (tourists)	20 506	21 531 e	22 823 e	..	..
Same-day visitors (excursionists)	..	..	..	..	..
Nights in all types of accommodation	128 105	134 510 e	142 580 e	..	..
Hotels and similar establishments	..	..	..	..	..
Specialised establishments	..	..	..	..	..
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
<b>Inbound tourism</b>					
Total international arrivals	4 397	4 457	4 601	5 487	6 712
Overnight visitors (tourists)	3 554	3 576	3 674	4 478	5 641
Same-day visitors (excursionists)	843	881	926	1 009	1 072
<b>Top markets</b>					
Argentina	1 378	1 363	1 326	1 947	2 901
Brazil	374	362	408	456	439
Bolivia	356	384	395	420	437
Peru	338	331	344	360	404
United States	158	154	162	187	209
Nights in all types of accommodation	..	..	..	..	..
Hotels and similar establishments	..	..	..	..	..
Specialised establishments	..	..	..	..	..
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
<b>Outbound tourism</b>					
Total international departures	3 448	3 674	3 841	4 103	4 269
Overnight visitors (tourists)	2 837	2 999	3 169	3 359	3 553
Same-day visitors (excursionists)	611	675	673	744	716
<b>Top destinations</b>					
Argentina	1 180	1 225	1 275	1 269	1 271
Peru	785	861	858	919	915
United States	182	198	225	259	299
Brazil	169	176	197	202	224
Spain	46	42	54	65	90
<b>TOURISM RECEIPTS AND EXPENDITURE, MILLION USD</b>					
<b>Inbound tourism</b>					
Total international receipts	3 159	3 171	3 202	3 413	3 697
International travel receipts	2 151	2 181	2 259	2 482	2 737
International passenger transport receipts	1 008	990	943	931	960
<b>Outbound tourism</b>					
Total international expenditure	2 400	2 499	2 706	2 517	2 715
International travel expenditure	1 833	1 867	2 089	1 963	2 137
International passenger transport expenditure	567	632	618	554	578

.. Not available; e Estimated value

Source: OECD Tourism Statistics (Database).


StatLink  <http://dx.doi.org/10.1787/888933639759>

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


	Number of establishments <sup>1</sup>	Number of persons employed <sup>2</sup>				
	2016	2012	2013	2014	2015	2016
<b>Total</b>	<b>95 413 f</b>	<b>441 944</b>	<b>445 156</b>	<b>442 962</b>	<b>461 201</b>	<b>471 660 f</b>
<b>Tourism industries</b>	<b>92 253 f</b>	<b>421 820</b>	<b>427 754</b>	<b>425 841</b>	<b>442 748</b>	<b>451 875 f</b>
Accommodation services for visitors	..	..	..	..	..	..
Hotels and similar establishments	11 228 f	75 404	75 858	77 922	83 652	87 535 f
Food and beverage serving industry	34 402 f	171 010	183 119	180 727	191 866	196 906 f
Passenger transport	34 529 f	143 129	136 784	138 013	136 519	134 344 f
Air passenger transport	193 f	17 054	16 760	17 174	16 909	17 084 f
Railways passenger transport	52 f	6 224	2 553	6 261	6 277	5 524 f
Road passenger transport	34 017 f	115 750	113 863	111 373	110 029	108 685 f
Water passenger transport	267 f	4 101	3 608	3 205	3 304	3 051 f
Passenger transport supporting services	309 f	952	865	706	775	1 036 f
Transport equipment rental	4 027 f	18 007	17 649	14 644	14 772	16 145 f
Travel agencies and other reservation services industry	1 941 f	7 781	7 660	7 932	8 650	8 975 f
Cultural industry	131 f	3 119	3 237	3 159	3 458	3 580 f
Sports and recreation industry	370 f	2 418	2 582	2 738	3 056	3 354 f
Retail trade of country-specific tourism characteristic goods	5 316 f	..	..	..	..	..
Other country-specific tourism industries	..	..	..	..	..	..
<b>Other industries</b>	<b>3 160 f</b>	<b>20 124</b>	<b>17 402</b>	<b>17 121</b>	<b>18 453</b>	<b>19 785 f</b>

.. Not available; f Forecast value

1. Data refer to number of enterprises.

2. Data refer to number of employees.

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888933639778>Table 3. **Chile: Internal tourism consumption**

Million CLP

	2013		
	Domestic tourism expenditure	Inbound tourism expenditure	Internal tourism consumption
<b>Total</b>	..	..	..
<b>Consumption products</b>	..	..	..
Tourism characteristic products	2 140 361 p	1 118 040 p	3 785 655 p
Accommodation services for visitors	268 285 p	144 461 p	723 961 p
Food and beverage serving services	268 285 p	220 958 p	535 423 p
Passenger transport services	302 964 p	130 967 p	501 681 p
Air passenger transport services	176 358 p	40 085 p	270 839 p
Railways passenger transport services	969 p	7 097 p	8 358 p
Road passenger transport services	118 855 p	82 227 p	204 478 p
Water passenger transport services	6 783 p	1 557 p	18 006 p
Passenger transport supporting services	..	..	..
Transport equipment rental services	21 p	15 316 p	15 337 p
Travel agencies and other reservation services industry	..	..	..
Cultural services	..	..	..
Sports and recreation services	153 584 p	31 497 p	193 588 p
Country-specific tourism characteristic goods	666 295 p	218 419 p	885 629 p
Country-specific tourism characteristic services	480 926 p	356 422 p	930 035 p
Other consumption products	..	..	..
Tourism connected products	..	..	..
Non-tourism related consumption products	..	..	..
<b>Non-consumption products</b>	..	..	..

.. Not available; p Provisional data

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888933639797>



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