

Peru

Tourism in the economy

Tourism is one of the main economic activities in Peru. It is recognised as an engine for economic, social and environmental development. It is the third most important source of foreign exchange earnings, after mining and agriculture, and it represents the principal source of services exports.

Tourism Gross Domestic Product represents 3.9% of Peru's GDP, increasing to 6.9% if domestic tourism is included. In 2016, tourism supported more than 1.3 million jobs, directly and indirectly.

International arrivals in Peru have seen significant and steady growth in the ten year period to 2016, when the figure reached 3.7 million.

The highest proportion of arrivals comes from Chile, which accounts for over 25% of international visitors. The second most significant market source is the United States, followed by Ecuador. Japan is an important generator of visits from Asia.

Domestic tourism in Peru generated over 42 million trips between cities and departments in 2016. The average length of stay of domestic holiday trips is 5 nights, generating an average spend of USD 466 per person.

Tourism governance and funding

The Ministry of Foreign Trade and Tourism (MINCETUR) is the lead authority for the sector and it defines, directs, executes, coordinates and supervises the country's foreign trade and tourism policy, in line with the general State policy.

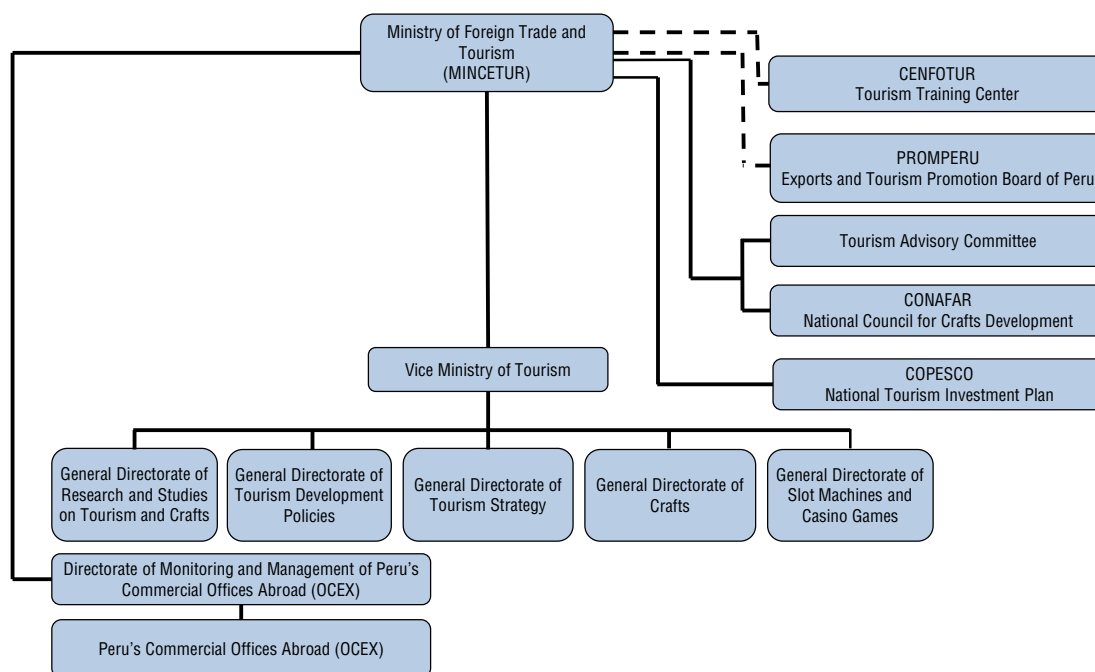
The Ministry of Foreign Trade and Tourism has two Vice Ministries, one of them is the Vice Ministry of Tourism which has five directorates. One of these is the Directorate of Tourism Development Policies, which is the responsible body for policy implementation, including supervising compliance and formulating actions concerning the quality of tourism services, environmental management in the sector, travel facilitation, tourist protection and promoting tourism awareness in the country. The other directorates cover strategy, research, crafts and casinos/gaming.

Moreover, there are two specialist advisory bodies comprising six to twelve members, namely: The Tourism Advisory Committee and the National Council for Handicraft Development (CONAFAR).

In all sectors of Peru, including tourism, the General Government establishes coordination mechanisms with regional governments, local governments and other entities, as required or appropriate to the nature of each policy.

The public sector budget of the tourism sector for 2017 was PEN 332.9 million, distributed as follows: PEN 85.2 million for the Vice Ministry of Tourism of MINCETUR; PEN 24.2 million for the Tourism Training Centre (CENFOTUR); PEN 134.8 million for the Peru Exports and Tourism Promotion Board (PROMPERU), and PEN 88.7 million for the COPESCO National Plan, MINCETUR's executing unit in charge of investment tourism projects of national interest.

Peru: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Foreign Trade and Tourism, 2018.

Tourism policies and programmes

Tourism in Peru is facing a range of challenges, which in part, stem from a growing middle class in emerging markets and changing attitudes towards travel. This requires improved infrastructure and travel facilitation, while also ensuring the safety of tourists.

A specific challenge is the need to develop occupational standards for workers in the tourism sector, in order to improve competitiveness and boost job creation and economic impact. Other issues include the mitigation of negative impacts on the environment and local communities.

The main policy instrument is the National Strategic Plan of Tourism of Peru (PENTUR). There are also a National Plan for Tourism Quality, a National Strategic Craft Plan, and a National Artisan Register (RNA). The RNA is a tool to identify artisans, handicraft companies or artisan associations. It enables the mapping of artisans in a defined geographic space, named "Craft Conglomerates", such as San Blas (Cusco), Quinoa (Ayacucho), Lurín (Lima), and their incorporation into tourist circuits.

The National Strategic Plan of Tourism has four pillars covering:

- The competitiveness and sustainability of tourism supply,
- Tourist market diversification,

- Travel facilitation,
- Sector strengthening, tourism awareness and vocational training.

The main objectives of the tourism policy are to:

- Incorporate continuous improvement in its processes, as a requirement for competitiveness: improving the quality of services and products and increasing tourist awareness, in harmony with the environment,
- Strengthen ties with the regional and local economy: increasing potential for social and cultural benefit from tourism, improving the local environment, and making local destinations ideal places to live, work and enjoy,
- Promote the development of sustainable tourism projects and activities that contribute to the development of communities,
- Promote and implement measures that contribute to the control and prevention of environmental pollution and biodiversity conservation.

The Peruvian Government, through the Ministry of Foreign Trade and Tourism has launched an inclusive development Programme called *Turismo Emprende* that promotes the creation, development and consolidation of private tourism-related enterprises through activities that include aspects of conservation, sustainable resource use and economic development. This programme has an annual fund of USD 763 000 for the next four years. The main objective is to provide grants for the development of tourism ventures at the national level. The Programme finances the improvement and expansion of established businesses as well the creation of new enterprises, in the hotel, restaurant and travel sectors. For new businesses, the programme can fund up to 100% of project costs.

The Exports and Tourism Promotion Board of Peru (PROMPERU) constantly monitors the evolution of visitor demand in order to adjust tourism promotion strategies. Sustainable tourism growth policies and initiatives have been oriented to social sustainability and inclusive development. The latter include community based rural tourism, social tourism, and an initiative called *Al Turista, Lo Nuestro* which promotes the direct incorporation of local products (agricultural, livestock, fishery, handicrafts, etc.) in the provision of tourism services. It aims to promote tourist supplies that incorporate quality regional services and products purchased directly from local entrepreneurs into the tourism value chain (Box 1.9).

Statistical profile

Table 1. Peru: Domestic, inbound and outbound tourism

	2012	2013	2014	2015	2016
TOURISM FLOWS, THOUSAND					
Domestic tourism					
Total domestic trips	99 600	102 300	104 950	108 100	..
Overnight visitors (tourists)	34 900	36 400	38 000	39 800	41 600
Same-day visitors (excursionists)	64 700	65 900	66 950	68 300	..
Nights in all types of accommodation	209 400	218 400	228 000	238 800	249 600
Hotels and similar establishments	44 138	48 431	51 186	52 395	56 236
Specialised establishments	..	..	..	..	..
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
Inbound tourism					
Total international arrivals	3 642	4 010	4 062	4 381	4 718
Overnight visitors (tourists)	2 846	3 164	3 215	3 456	3 744
Same-day visitors (excursionists)	796	847	847	925	974
Top markets					
Chile	807	886	904	985	1 056
United States	447	487	514	545	586
Ecuador	176	208	224	256	318
Colombia	134	135	152	165	190
Argentina	159	155	156	171	175
Nights in all types of accommodation					
Hotels and similar establishments	..	..	..	..	..
Specialised establishments	..	..	..	..	..
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
Outbound tourism					
Total international departures	2 569	2 656	2 733	2 914	3 095
Overnight visitors (tourists)	2 296	2 364	2 442	2 595	2 751
Same-day visitors (excursionists)	273	292	292	319	343
Top destinations					
Chile	1 059	1 089	1 091	1 181	1 288
United States	198	223	259	289	305
Bolivia	341	318	315	290	270
Ecuador	137	147	161	154	136
Colombia	62	70	93	120	123
TOURISM RECEIPTS AND EXPENDITURE, MILLION USD					
Inbound tourism					
Total international receipts	3 073	3 925	3 908	4 151	3 512 e
International travel receipts	2 443	3 009	3 077	3 320	3 512 e
International passenger transport receipts	631	916	830	831	..
Outbound tourism					
Total international expenditure	1 900	2 114	2 119	2 351	1 838 e
International travel expenditure	1 439	1 601	1 590	1 691	1 838 e
International passenger transport expenditure	461	513	529	660	..

.. Not available; e Estimated value

Source: OECD Tourism Statistics (Database).


StatLink  <http://dx.doi.org/10.1787/888933642096>

Table 2. Peru: Enterprises and employment in tourism

	Number of establishments	Number of persons employed ¹				
	2016	2012	2013	2014	2015	2016
Total	..	521 668	526 439	530 241	542 054	..
Tourism industries	..	474 121	484 481	486 935	499 758	..
Accommodation services for visitors
Hotels and similar establishments	21 370	56 578	57 599	57 636	58 997	..
Food and beverage serving industry	170 545	182 357	189 021	190 119	192 813	..
Passenger transport	..	104 390	107 127	108 086	112 975	..
Air passenger transport	..	4 422	4 638	4 703	4 917	..
Railways passenger transport	..	430	450	474	497	..
Road passenger transport	..	99 102	101 590	102 449	107 084	..
Water passenger transport	..	436	449	460	477	..
Passenger transport supporting services
Transport equipment rental	..	493	514	535	557	..
Travel agencies and other reservation services industry	10 985	29 855	30 719	30 835	32 624	..
Cultural industry	..	25 818	26 064	26 253	27 379	..
Sports and recreation industry	..	20 167	20 739	20 773	21 325	..
Retail trade of country-specific tourism characteristic goods	..	8 871	9 126	9 141	9 478	..
Other country-specific tourism industries	..	45 592	43 572	43 557	43 610	..
Other industries	..	47 547	41 958	43 306	42 296	..

.. Not available

1. Data refer to number of employees.

Source: OECD Tourism Statistics (Database).


StatLink  <http://dx.doi.org/10.1787/888933642115>


Table 3. Peru: Internal tourism consumption

Million PEN

	2011		
	Domestic tourism expenditure	Inbound tourism expenditure	Internal tourism consumption
Total	..	..	..
Consumption products	20 294	7 750	30 209
Tourism characteristic products	17 472	7 502	25 840
Accommodation services for visitors	1 954	1 923	4 628
Food and beverage serving services	4 666	1 444	6 110
Passenger transport services	7 558	2 602	10 160
Air passenger transport services	1 978	1 928	3 906
Railways passenger transport services	136	58	194
Road passenger transport services	5 352	617	5 969
Water passenger transport services	92	0	92
Passenger transport supporting services	..	..	..
Transport equipment rental services	119	11	130
Travel agencies and other reservation services industry	615	336	951
Cultural services	554	321	990
Sports and recreation services	1 106	145	1 251
Country-specific tourism characteristic goods	584	542	1 127
Country-specific tourism characteristic services	314	178	492
Other consumption products	2 822	248	4 369
Tourism connected products	681	39	1 082
Non-tourism related consumption products	2 141	209	3 287
Non-consumption products	..	..	..

.. Not available

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888933642134>



From:
OECD Tourism Trends and Policies 2018

Access the complete publication at:

<https://doi.org/10.1787/tour-2018-en>

Please cite this chapter as:

OECD (2018), "Peru", in *OECD Tourism Trends and Policies 2018*, OECD Publishing, Paris.

DOI: <https://doi.org/10.1787/tour-2018-52-en>

This work is published under the responsibility of the Secretary-General of the OECD. The opinions expressed and arguments employed herein do not necessarily reflect the official views of OECD member countries.

This document and any map included herein are without prejudice to the status of or sovereignty over any territory, to the delimitation of international frontiers and boundaries and to the name of any territory, city or area.

You can copy, download or print OECD content for your own use, and you can include excerpts from OECD publications, databases and multimedia products in your own documents, presentations, blogs, websites and teaching materials, provided that suitable acknowledgment of OECD as source and copyright owner is given. All requests for public or commercial use and translation rights should be submitted to rights@oecd.org. Requests for permission to photocopy portions of this material for public or commercial use shall be addressed directly to the Copyright Clearance Center (CCC) at info@copyright.com or the Centre français d'exploitation du droit de copie (CFC) at contact@cfcopies.com.