

DOI: 10.34020/2073-6495-2019-3-212-216

УДК 338.48

РАЗВИТИЕ ТУРИСТИЧЕСКОГО СЕКТОРА В ЭКОНОМИКЕ КОЛУМБИИ

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В статье анализируется роль туристического сектора в экономике Колумбии. Авторы считают, что, используя сравнительные преимущества в латиноамериканском регионе с точки зрения географического положения, природных ресурсов и культурных ценностей, туристический сектор Колумбии может стать одним из драйверов экономического развития страны. Рассматриваются темпы экономического роста и структура ВВП. Анализируются перспективы развития туристического сектора: занятость, политика управления, инфраструктура данной отрасли и ее влияние на экономику страны.

Ключевые слова: туризм в Колумбии, экономическое развитие Колумбии.

DEVELOPMENT OF TOURISM IN THE COLOMBIAN ECONOMY

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The role of the tourism sector in the economy of Colombia is analyzed in the article. The authors believe that, using comparative advantages in the Latin American region in terms of geography, natural resources and cultural values, the tourist sector of Colombia can be one of the drivers of the country's economic development. The rates of economic growth and the structure of GDP are considered. Analyzed are the prospects for the development of the tourism sector: employment, management policies, infrastructure of the industry and its impact on the country's economy.

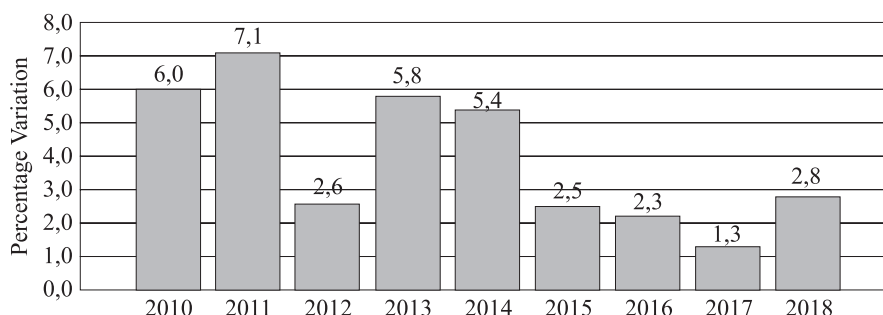
Keywords: tourism in Colombia, economic development of Colombia.

Colombia, located in the northwest corner of South America has a strategic position as the midpoint in the Americas, it has an extension of 3,513 km of coastline, being the only country in the subcontinent with coasts in the Pacific Ocean (1,545 km) and in the Atlantic Ocean (1,779 km). In addition, it has 483,164 km² of Amazon rainforest and three mountain ranges cross from the south to the northern part of the country. This condition, Andean, tropical and equatorial gives it the privilege of having all kinds of climates and the highest index of biodiversity in the world (10 %/km²), being the second country with known species and the fifth richest country in natural resources.

To protect this natural heritage the state has developed a preservation policy by creating National Natural Parks, in which there are settlements of millenarian indigenous cultures living in their ancestral areas, becoming guarantors of the conservation of the natural treasure and the cultural traditions of Colombia.

In economic matters Colombia ranks as the fifth most competitive economy in Latin America behind Chile, Mexico, Uruguay and Costa Rica in the Global Competitiveness Index (GCI) of the World Economic Forum 2018 [1], and worldwide it ranks 60 out of 140 economies analyzed.

The annual growth rate of Colombia’s economy in 2010–2018 is illustrated in Figure: it is currently below the potential capacity of 3,5 % per year. The low growth rates in 2015–2017 were the reflection of the drop in oil and mineral prices, tax reforms, high economic and political uncertainty in the country and in the world. However, by 2018 there is a slight recovery of Colombia’s economy, due to the fact that the world’s economy has been reactivated and prices of oil have increased.



Gross Domestic Product (GDP) – Annual Growth Rate 2010–2018.

Source: (DANE, 2019) [3]

The largest branches of economic activity as of 2018 are presented in the Table. Predominant economic sectors in Colombia are concentrated in the tertiary sector or service sector, meanwhile sectors related to the real economy, such as agriculture and industry, have been losing their shares in GDP.

Percentage share of value added by economic activity – GDP 2018

Economic activity	Participation, %
Wholesale and Retail	17,72
Public administration and defense	14,90
Manufacturing industries	11,31
Real estate activities	8,67
Professional, scientific and technical activities	6,95
Building	6,48
Agriculture, livestock, hunting, forestry and fishing	6,27
Mining and quarrying	5,67
Financial and insurance activities	4,33
Supply of electricity, gas, steam and air conditioning	3,12
Information and communications	2,85
Artistic, entertainment and recreation activities and other service activities	2,37
Taxes less subsidies on products	9,35
Gross domestic product	100,00

Source: (DANE, 2019)

Tourism sector contributes approximately 4 % of Colombia's GDP. It has shown significant growth in recent years, due to social, political and economic factors that have changed positively the image of the country. Tourism can become an engine for the development of the national economy. The development of tourist industry is complex, due to many sub-industries it is based on – accommodation, restaurants, transportation, travel agencies and leisure activities. Together they determine the quality of tourism offer [4].

In year 2017, 52,25 % of employed in tourism were independent workers and 45,73 % were wage earners; men represented 63,33 % and women 36,66 % of employed in tourism industry. Colombia is among the five countries of Latin America with the highest flow of foreign visitors: in 2010–2017 there was an increase of 150 %, or additional 3,924,492 foreign tourists. In year 2018 growth continued – 10,4 % annual growth rate according to the Ministry of Commerce, Industry and Tourism – MINCIT [5]. The country received USD\$ 5,787 million of generated currencies, an increase of 68 % compared to 2010 with USD \$ 3,440 million. Therefore, tourism industry is a sector in consolidation.

In the 2017 Travel and Tourism Competitiveness Report [6], Colombia ranked as the sixth most competitive economy in South America, behind Brazil, Chile, Argentina, Peru and Ecuador, placing it on 62 position worldwide out of 136 economies analyzed, finding Colombia's advantages in the use of natural resources and the level of air infrastructure. However, the land transport due to inefficient investments was a disadvantage. At security level, the perception of terrorism has improved recently, however, crime levels require more attention.

Tourism with a clearly stated management policy generates positive effects in many countries. In Colombia, the government has proposed various guidelines in cultural policy and ecotourism taking advantage of the implementation of peace agreements carried out with rebel groups (guerrillas) and independent militias (paramilitaries). But the problem of drug trafficking and the forced internal migrations have limited development of the tourist sector.

The projects which the government and different entities currently work on at national and international level, the creation of 12 tourist corridors classified into three groups are highly important, because now two or more departments, closed previously for travel of civilian population, are available now. Travelers can visit these territories as well invest in infrastructure, training, innovation and business development, creating jobs that allow creating sustainable production chains and local development.

Although activities carried out in the tourism sector are affected by seasonality, the sector has the following positive economic impacts on the national economy: foreign exchange earnings, contributions to productive factors – work, physical capital, technology, and natural resources, economies of scale improvement, business or business creation opportunities and, therefore, it contributes to growth of GDP of Colombia.

At the local level, the impact of money income on tourism spending is reflected in three forms: direct, indirect and induced [7]. Direct income is related to tourist services companies' sales, as well as hotels, air or land transport, travel agencies and leisure and recreation services. Indirect income is reflected in spending on goods and services from suppliers by tourist services companies,

spending on investment to improve infrastructure in the sector, spending on publicity of the sector by the State. Finally, the induced effect is the spending made by all those that are directly or indirectly related to the tourism sector, promoting the consumption of other products and services, which causes a multiplier effect in the economy.

Considering that tourism sector in Colombia creates synergy with other economic activities, it has possibilities to expand, transform and adapt to changes in the economy of the country. Tourism is not just a service, it can be considered as a development model.

The good moment tourism sector is currently experiencing, has made it important and the National Government's strategic plans schedule to improve market information of the sector, to promote new destinations nationally and internationally with the creation of tourist corridors, promoting entrepreneurship with companies, cooperatives and local communities, who have a great opportunity to obtain benefits from the tourism development.

The Peace agreement signed with one of the rebel groups in 2017 has allowed the tourism sector to contemplate new places with natural wealth to promote tourism activities. In addition, currently the Government provides tax, fiscal and subsidy benefits for the creation of companies in tourist sector. Besides, the Government has boosted tourism investment significantly, which promotes the creation of national companies and international chains, which also have interests in investing in Colombia.

It is necessary that the government keeps consolidating the perception of security that has been built, supporting these processes through various regulatory developments that allow organizing and directing the tourism industry, providing economic contributions that encourage the activity, as well as advising on training in tourism activities and promoting legalization, because nearly 41 % of the tourism sector is informal as of now.

Conclusions: In 2017 Colombia was ranked 62nd in the Tourism and Travel Competitiveness Report. Tourism sector, which directly produces 4 % of the Gross Domestic Product (and 5,8 % indirectly), together with other industries, can be important engine of economic growth of Colombia.

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