



The Future of Tourism in Chilean Patagonia

FROM GROWTH TO STEWARDSHIP: STRATEGIC PATHWAYS FOR A
DISTINCTIVE AND RESILIENT DESTINATION

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Executive Summary

“
*Chilean Patagonia is entering a
decisive phase.*
”

Tourism has become one of the region's most important economic engines, creating employment, attracting international visibility and strengthening Patagonia's position as one of the world's most distinctive nature destinations. In Magallanes, tourism already accounts for 11% of regional employment (see figure 1), one of the highest shares in Chile. Nationally, Chile welcomed 5.2 million international visitors in 2024, which exceeded pre-pandemic levels and reflected the return of global demand.

But growth alone is not a strategy. The question is no longer whether tourism should expand, but what kind of destination Patagonia wants to become. The region faces a clear strategic choice. It can follow a model based on higher volume and short-term gains with increasing pressure on infrastructure, ecosystems and local communities. Or it can strengthen its position as a high-value destination built on nature, culture, scientific relevance and territorial stewardship.

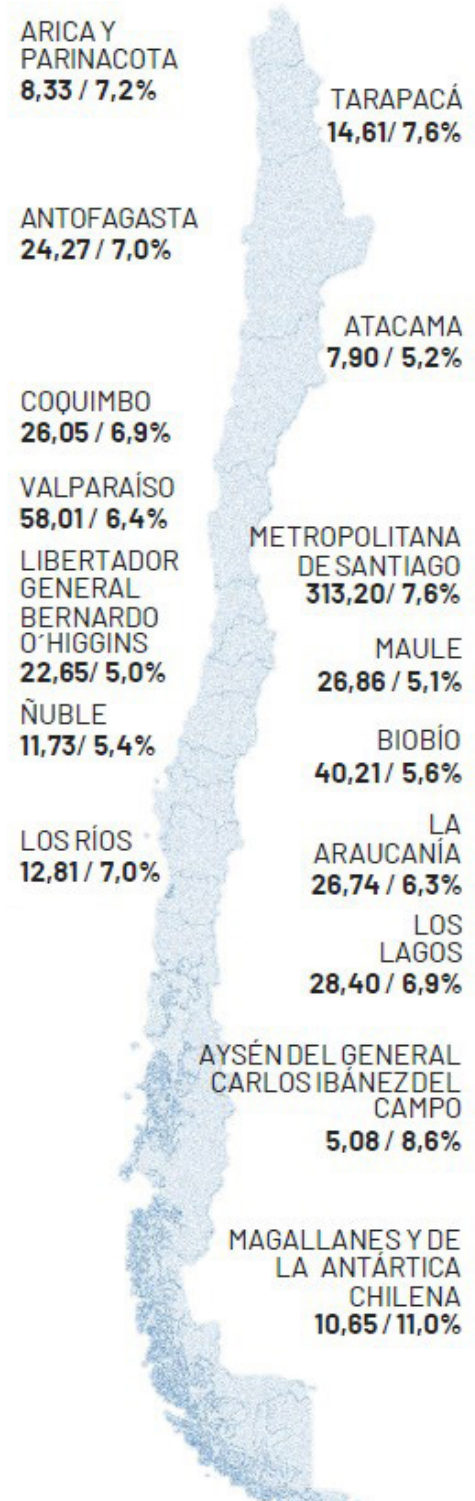


Figure 1. Number of employees in tourism-related activities (in thousands) / share of total employment per region (%). Source: anuario de turismo 2024, sernatur & subsecretaría de turismo (2025)

Unlike destinations such as Ushuaia, Patagonia's competitive advantage is not scale. It is authenticity, lower saturation, exclusivity and the rare ability to connect visitors with glaciers, Antarctica, maritime routes, local culture and one of the last truly remote landscapes in the world.

But its greatest strength is also its greatest vulnerability. More than half of the territory is protected land, making nature not simply an attraction but the foundation of the regional economy. Visitors do not come to Patagonia because it has a 'built-up' tourism infrastructure; they come for the experience of place. When ecosystems weaken, so does the destination.

At the same time, fieldwork reveals a consistent warning from local actors: infrastructure is not keeping pace with ambition. Energy systems, water security,

mobility, port logistics, housing, workforce conditions and public coordination remain fragile. Puerto Williams illustrates this contradiction clearly: this destination is positioned as a premium Antarctic gateway but still struggles with basic water infrastructure and limited operational capacity.

The next decade will depend on decisions made now. Patagonia should not compete by becoming bigger. It should compete by becoming better. That means investing in sustainable infrastructure, strengthening talent and service quality, diversifying the visitor experience beyond iconic landscapes and improving governance across local, regional and national levels.



In a Nutshell

STRONG POSITIONING

A distinctive global position

Patagonia offers something few destinations can replicate: genuine remoteness, Antarctic proximity, scientific legitimacy, stunning landscapes and cultural depth. This creates strong potential for premium tourism rather than mass tourism.

Tourism as a strategic economic driver

Tourism supports employment, logistics, gastronomy, science and territorial visibility. It is not a secondary activity but one of the main platforms for regional development.

International positioning with lower saturation

Compared with more mature southern destinations, Patagonia remains authentic and there is still time for strategic planning before reaching critical saturation.

CONSTRAINTS THAT REQUIRE ACTION

Infrastructure must match destination ambition

Energy, water, waste systems, transport and port capacity are limiting long-term competitiveness. Premium positioning is impossible when basic services are lacking.

Communities must benefit more clearly

Tourism is doomed to fail if residents experience only pressure, seasonality and rising costs. Local buy-in is a strategic requirement, not a social accessory.

Governance must become faster and more coordinated

Fragmented decision-making between municipalities, regions and national institutions slows investment and weakens destination strategy.

PRIORITIES FOR INVESTMENT

Sustainable territorial infrastructure

Prioritize mobility solutions, water systems, energy resilience, port operations and service capacity in key gateways such as Punta Arenas, Puerto Natales and Puerto Williams.

Human capital and workforce capability

Strengthen hospitality skills, multilingual service, entrepreneurship, leadership development and professional training for a premium destination model.

Diversification beyond iconic attractions

Tourism should move beyond Torres del Paine and glacier viewing by expanding gastronomy, winter tourism, indigenous knowledge, science tourism, cultural immersion and longer-stay experiences.

Research Strategy

This white paper is based on [original fieldwork](#) conducted across Chilean Patagonia during a three-week research visit in February 2026, complemented by follow-up interviews and secondary statistical analysis.

The study draws on more than 30 interviews with stakeholders across the tourism ecosystem in Punta Arenas, Puerto Natales, Puerto Williams, Torres del Paine and surrounding maritime territories. The objective was not only to assess tourism performance, but to identify where the current model is generating opportunity, where pressures are intensifying and where strategic decisions are becoming increasingly urgent.

The research incorporated perspectives from:

- industry actors across hospitality, cruise tourism, expedition travel, gastronomy and logistics
- public institutions involved in tourism, infrastructure, conservation and regional development
- civil society and indigenous organizations connected to territorial governance and cultural heritage
- academic and scientific actors working on Antarctic access, biodiversity and territorial development

The analysis combines field insights with official tourism statistics from Chilean government sources published by the Tourism Department and SERNATUR, together with historical visitation trends across protected areas in the region.

Further details on the fieldwork, stakeholder engagement process and analytical methodology are provided in the Methodological Note.

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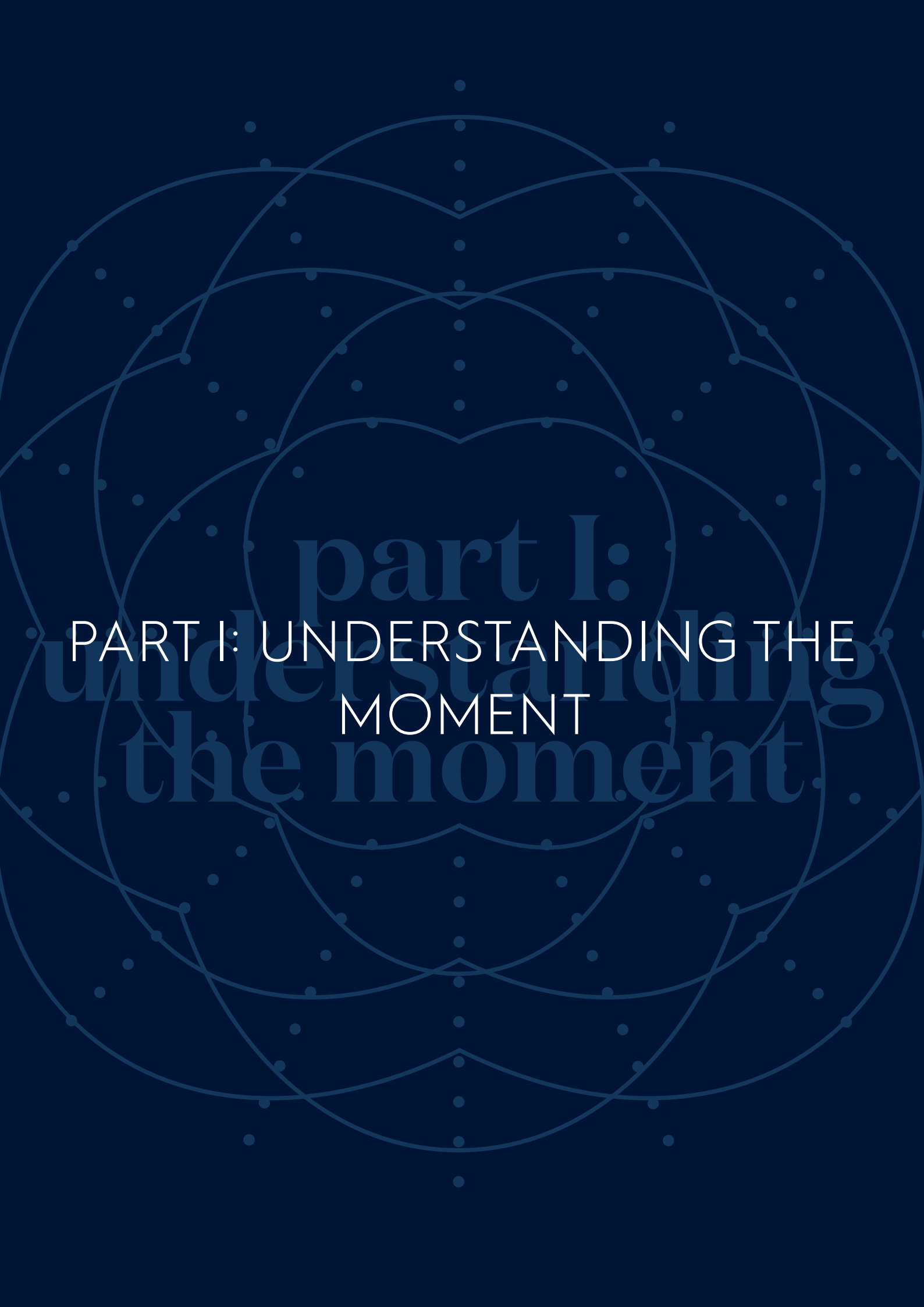
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The background features a dark blue field with a complex geometric pattern. It consists of several large, overlapping circles in a lighter shade of blue. Scattered throughout the entire image are numerous small, light blue dots, some of which are positioned at the intersections of the circles, creating a starry or network-like effect.

PART I: UNDERSTANDING THE MOMENT

First Signals of Change

HOW TOURISM HAS CHANGED

Tourism has been gradually evolving:

- More arrivals
- Shorter stays
- Higher expectations
- Less tolerance for friction

Then the visitor profile changed. The long-distance backpacker gave way to the premium traveler. Cruise passengers, fly-cruise visitors and high-end expedition tourism began to define the new market. The shift is visible in Torres del Paine, in Puerto Williams and across the Antarctic gateway.

Visitors arrive looking for wilderness but expect comfort. As one local actor described it, Patagonia moved from rugged boots and large backpacks to wheelie suitcases in the mud.

This is not a small operational detail. It is a paradigm shift affecting transport, accommodation, guiding services, safety, infrastructure and service expectations.

This shift has created strategic tension.

How do you preserve authenticity without turning wilderness into a theme park?

How do you improve access without destroying the idea of pristine raw nature and remoteness? Local actors describe this as the risk of simplification. Torres del Paine's value comes from the physical challenge, the feeling of vastness and the "must-do" experience.

The first warning signs are clear:

- concentration in fewer and fewer iconic places
- highest pressure during peak months
- growing operational stress
- heavier dependence on external demand

Growth is just part of the equation and the above-mentioned warning signs will shape the kind of destination Patagonia may become.



“
*Patagonia remains a
challenging destination while
visitor expectations are shifting
toward comfort and seamless
service*
”

Competitive Differentiation

WHY CHILEAN PATAGONIA STANDS APART

Patagonia does not need to compete on volume. It must compete on distinctiveness.

The region shares characteristics with other polar and subpolar destinations such as Ushuaia, Iceland, Alaska and parts of Northern Europe, which attract visitors through nature, remoteness and the promise of extraordinary landscapes. But Chilean Patagonia holds a different position.

Its value lies in lower saturation and a stronger sense of authenticity. Many destinations have already moved toward high visitor concentration and standardized experiences. Patagonia still offers distance, silence and the feeling of being in a unique place that is untouched by tourism.

That is a strategic advantage. Visitors come here because the destination still feels real. They are looking for connection with nature, unstable weather and being awestruck by the stunning landscapes. Instead of convenience, they are searching for rarity.

Chile also has the third largest continental ice extension in the world, after Antarctica and Greenland. Very few destinations can combine glaciers, fjords, Antarctic access, protected landscapes and maritime routes at this scale. Ice is at the heart of Patagonia's global identity.

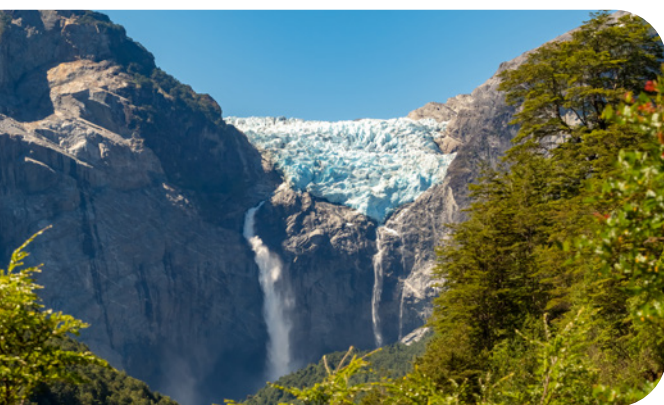
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Nature is not an attraction. It is the reason the destination exists.

”

Patagonia is a hub for scientific research. The region connects tourism with Antarctic research, biodiversity, marine ecosystems and climate observation. In addition to being a destination, it is a place that is studied and understood, especially by high-value travelers seeking expedition and knowledge-based experiences.

Culture adds depth. Indigenous knowledge, navigation history, pioneer stories and frontier life create a stronger sense of place than many nature destinations can offer. Visitors come for the landscapes and stay for the sense of meaning. This supports a better tourism model: fewer visitors, higher value per visitor, longer stays and stronger long-term reputation. Premium tourism is about quality, depth and memory and Patagonia excels in this respect.



part II: where
pressure is
building

Infrastructure that Will Define the Future

GROWING DEMAND, FRAGILE FOUNDATIONS

Tourism growth is visible, and so is the increasing pressure on the systems that support it. Across the region, interviews pointed consistently to the same conclusion: the main challenge is not attracting visitors but ensuring that infrastructure and territorial capacity can support long-term growth.

Three constraints appeared most frequently during fieldwork: water, connectivity and workforce conditions.

- **Water** is one of the clearest examples. In Puerto Williams, local actors highlighted the contrast between the international positioning of the destination as an Antarctic gateway and the persistent limitations in water supply and basic urban services. This is an operational issue that shapes how growth is experienced locally.
- **Connectivity** creates similar concerns. Air access remains essential, but high prices and limited competition create barriers for residents, workers and visitors alike. Maritime logistics are equally critical. Fuel supply interruptions affect expedition operations, local mobility and the reliability of tourism activity in remote areas. Port infrastructure and maritime coordination remain central, especially for cruise tourism and Antarctic access.

- **Workforce conditions** complete the picture. Tourism depends on people; but recruitment, retention and professionalization remain difficult. This is exacerbated by limited housing and the rising cost of living. These downsides often outweigh the potential benefits of local job opportunities. Stable tourism development requires stable living conditions.

Other systems reinforce the same challenge.

- **Food systems** are part of the same conversation. Local gastronomy, seasonal production and stronger links between tourism and regional suppliers help create a more complete visitor experience while supporting local economic resilience. Food is part and parcel of destination quality.



- **Waste management and environmental services** are equally important. In a destination where nature defines international reputation, environmental infrastructure becomes part of the tourism product itself. This includes collection and disposal, as well as the ability to separate waste streams, recycle materials such as plastic, and develop local systems for composting and food waste management.

Infrastructure planning should move beyond peak season logic and support a more integrated destination model where nature, culture, food, mobility and local life reinforce one another throughout the year. This is where long-term competitiveness is built.

Tourism and Everyday Life

SUCCESS MUST BE TWO-SIDED

Tourism shapes daily life long before it appears in visitor statistics.

Across Patagonia, tourism supports employment, local business activity and territorial visibility. In many places, it sustains services that would otherwise be difficult to maintain, from transport connections and restaurants to guiding services and small-scale entrepreneurship. In Puerto Williams, for example, the seasonal relationship between fishing and tourism creates an important local balance. As one interviewee explained, “people from our own community, since the fishing plant closes in summer, go to work in tourism. It’s a positive impact”.

At the same time, growth can also create friction.

Seasonality remains one of the most visible challenges, although its impacts vary across destinations. In Punta

Arenas, many interviewees described a highly concentrated tourism cycle tied to cruise operations and Antarctic gateway activity, creating intense peaks for accommodation, transport and local services followed by long periods of lower demand. Travel agencies, hotels and restaurants repeatedly pointed to the difficulty of maintaining staffing, service continuity and business stability outside the peak season.

In Puerto Natales, seasonality pressures appear somewhat less acute due to the longer tourism calendar associated with Torres del Paine and year-round visitor flows. Nevertheless, businesses and local stakeholders still emphasized strong seasonal fluctuations, particularly in employment and operational planning.

Labor shortages were mentioned repeatedly during fieldwork, especially in hospitality, guiding, maritime operations and specialized services. The challenge is not only the number of workers, but also qualification, retention and professionalization. Premium tourism requires continuity, skills and a stronger service culture.

Housing and public services also shape local perceptions. In smaller and remote communities like Puerto Williams, tourism growth can increase costs without generating clear local benefits. When that happens, acceptance becomes more fragile and tourism is experienced less as development and more as pressure.

Another recurring issue was uneven value capture. Large visitor flows do not always translate into stronger local economies when spending remains concentrated in a limited number of operators or external actors. Communities often absorb the

pressures associated with tourism growth, seasonality and infrastructure demand, while the economic value generated by visitor activity is not always retained proportionally within local economies. This is particularly sensitive in indigenous and territorial communities, where recognition and participation remain uneven. As one local representative in Puerto Williams noted during discussions surrounding tourism and trail mapping initiatives in the Dientes de Navarino area, “they are making the map, and there is no indigenous person. They didn’t even invite one”

Tourism is more resilient when residents see it as part of a better future instead of a permanent trade-off.



Nature Is the Core Asset

ENVIRONMENTAL LIMITS ARE BUSINESS LIMITS

Nature is what attracts people to Patagonia. It is the reason it exists as a destination.

Visitors come for glaciers, fjords, wildlife, forests, marine routes and the feeling of being close to one of the last large-scale natural frontiers in the world. Tourism depends on that promise. When ecosystems weaken, destination value weakens as well.

This is especially visible in protected areas such as Torres del Paine and in Antarctic and sub-Antarctic routes, where the concentration of visitors creates growing pressure on fragile ecosystems. Cruise concentration, peak-season overload and unmanaged visitation can quickly turn iconic landscapes into vulnerable ones.

Several interviewees said that the region's most valuable asset was its pristine natural surroundings. Ecological stewardship and industry are often at odds. This tension is visible in debates around aquaculture, protected marine areas and indigenous territorial claims.

In fact, tourism and conservation often find themselves allies when resisting pressure from mining and other resource-depleting industries. As one tourism operator explained, "Salmon farming destroys pristine environments, which could jeopardize our nature tourism brand".

Antarctic access adds another layer of responsibility. Patagonia benefits from its role as a gateway, but tourism growth must coexist with science, conservation and the governance frameworks established through the Antarctic Treaty System. Cruise tourism also operates within the self-regulatory framework of IAATO, the International Association of Antarctica Tour Operators, which plays a central role in managing visitor conduct, environmental standards and landing protocols. Growth in Antarctic tourism depends on maintaining international legitimacy and environmental trust.



Glaciers offer perhaps the clearest reminder of what is at stake. The retreat of the San Rafael Glacier, documented over more than a century, shows how quickly landscapes that define Patagonia's global image can change. What visitors experience today cannot be assumed for the next generation.

See this article of National Geographic: [The sobering reality of glacier tourism in Chilean Patagonia](#) for more information about it.

Without conservation, tourism in Patagonia would not be possible in the first place. Protecting ecosystems, managing carrying capacity and strengthening environmental stewardship are not separate from competitiveness. Instead of being seen as a zero-sum game, conservation should be held up as the foundation of long-term destination value.



PART III: BUILDING THE NEXT
MODEL

Investing for the Future

STRATEGIC PRIORITIES

Where investment goes is just as—if not more—important than the size of investments when it comes to enhancing the long-term competitiveness of the destination. Fieldwork across Patagonia points to three areas that require stronger and more consistent attention: infrastructure, people and diversification.

1. Sustainable Infrastructure

Infrastructure is crucial to destination quality. If Patagonia is going to be a destination positioned around nature and premium experiences, it must have systems that are resilient in the longer term.

Water systems, energy reliability, mobility, port operations, waste management and housing conditions shape both visitor experience and local quality of life. Investment in these areas needs to be integrated into the design of the tourism product itself.

2. Human Capital and Workforce Development

Tourism depends on people before it depends on promotion. Hospitality skills, multilingual service, guiding capacity, maritime specialization, leadership development and entrepreneurship all determine destination quality. Attracting visitors is counterproductive if there are no hospitality workers to serve them. Professionalization also depends

on stable living conditions, career opportunities and stronger links between tourism education and territorial needs.

3. Diversification Beyond Iconic Attractions

Torres del Paine and glacier tourism remain central, but long-term resilience requires a broader offer. Diversification improves both competitiveness and territorial balance. The goal may not be to add more attractions, but to create a more complete destination. Culture, gastronomy, winter tourism, science-based travel, indigenous knowledge and longer-stay experiences create stronger value and reduce concentration pressure on a few iconic sites.



Beyond Torres del Paine and “See the Ice”

DIVERSIFYING THE TOURISM OFFER

Torres del Paine, glaciers, nature, wildlife and Antarctic routes will remain central to Patagonia’s identity. They are the global symbols of the destination and its strongest international assets.

Visitors may arrive for the landscape, but they stay longer and return because of the full experience around it. That means expanding the offer beyond observation and toward participation.

- **Culture** is one of the clearest opportunities. Local history, maritime heritage, pioneer stories and indigenous knowledge create meaningful experiences that many nature destinations cannot match. They turn travel into understanding.
- **Gastronomy** plays the same role. Local seafood, lamb, king crab, seasonal products and regional culinary traditions connect visitors to place in a direct and memorable way. Food shapes the identity of a destination.
- **Science tourism** offers another path. Patagonia’s connection to Antarctica, biodiversity research, marine ecosystems and climate observation create opportunities for educational travel and expeditions.
- **Winter experiences** and off-season travel can also reduce concentration in peak months. Snow, silence, slower travel and longer stays create a different value proposition from the hustle and bustle of summer tourism.

- **Local immersion** is an opportunity to move away from so-called checklist tourism. Visitors increasingly look for meaningful connection with communities, landscapes and local ways of life, not only the Instagrammable spots.

“

With Patagonia, nature will always be on full display. Curating genuine experiences that leave visitors with a deeper understanding of place, people and territory will add to a memorable trip.

”



Skills and Service Excellence

TRAINING FOR A PREMIUM DESTINATION

Patagonia already has exceptional natural and human assets. The next step is strengthening the human capabilities that turn those assets into long-term value.

At the **operational level**, hospitality skills remain central. Service quality, guiding, interpretation, food and beverage management, housekeeping, transport coordination and attention to detail shape how visitors experience the destination. In high-value tourism, small failures are remembered as much as spectacular tourist attractions or breathtaking landscapes.

A **multilingual workforce** is increasingly important. International visitors expect communication, clarity and confidence across the full travel experience, from accommodation and guiding to safety protocols and emergency response.

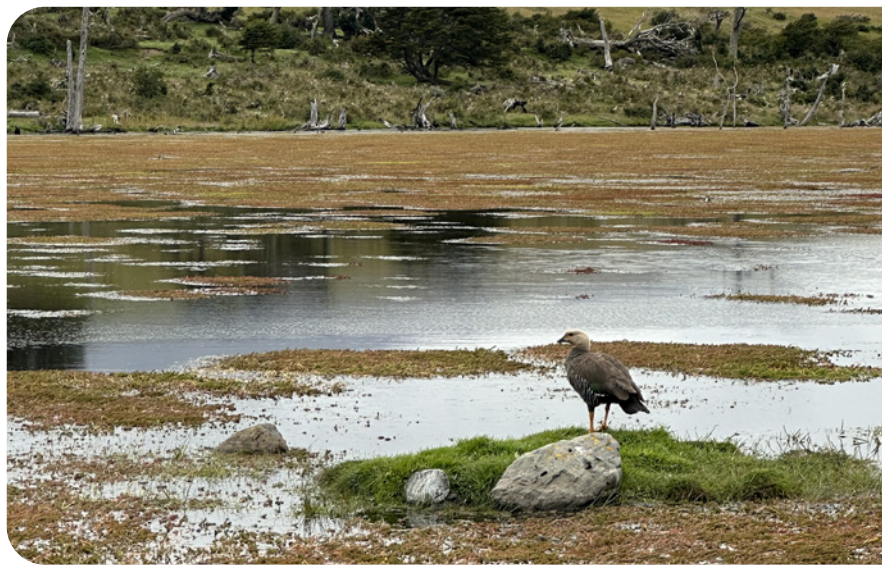
Technology and AI should support current service models, not replace them. Better booking systems, revenue management, visitor flow monitoring, predictive maintenance and personalized service can improve efficiency while protecting destination quality. Technology works best when it strengthens human experience rather than standardizing it.

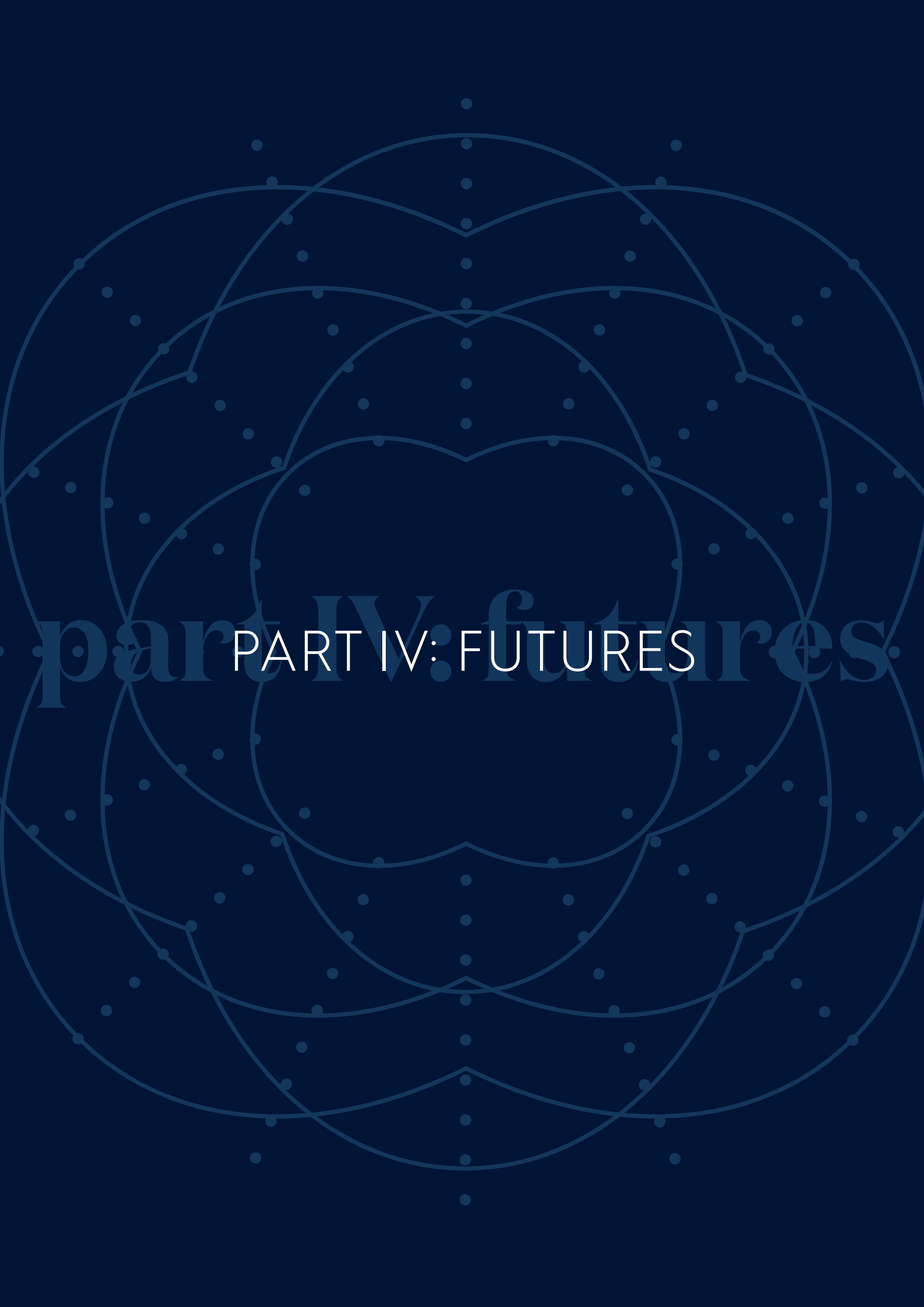
Sustainability operations now form an integral part of hospitality. Waste separation, energy efficiency, water management, responsible sourcing and circular practices can enhance or diminish destination credibility and service excellence.

Strategic capabilities are needed to take Patagonia to the next level. Leadership, change management, innovation and sustainability management determine whether tourism evolves as a long-term development model or remains a seasonal activity.

Local entrepreneurship deserves stronger support as well. Small businesses, guides, food producers and local operators are often the ones creating the most authentic experiences. Their growth strengthens both tourism quality and local value capture.

Premium tourism requires premium capabilities. That means stronger operational skills, stronger leadership and stronger institutions able to lead tourism beyond the next season.





part IV: futures

PART IV: FUTURES

Which Future Do We Want

THREE SCENARIOS FOR PATAGONIA

Patagonia is choosing today what kind of tourism economy it wants to build for a better tomorrow. We propose three scenarios based on our study. Only one leads to long-term resilience.

A

Scenario A — Volume First **More visitors, more pressure, less control**

This path prioritizes rapid growth through land/cruise visitor numbers and short-term demand. It increases visibility and immediate revenue, but also creates stronger pressure on infrastructure, protected areas and local services. The destination becomes more dependent on seasonality and external demand, while differentiation weakens over time.

Growth is visible. Value creation is uneven. Patagonia risks becoming easier to sell, but harder to sustain.



B

Scenario B — Premium Extraction

Higher spending, limited territorial benefits

This model focuses on high-value visitors, luxury positioning and premium pricing. Revenue per visitor increases, but benefits remain concentrated in a small number of operators, assets or external investors. Local suppliers, communities and smaller businesses capture limited value.

While the destination looks successful from the outside, the depth of economic integration within the regional economy remains limited. Often, premium tourism without local inclusion can help the destination garner a sterling reputation among certain groups of travelers, but it does not build resilience in the local tourism fabric.

C

Scenario C — Stewardship and Shared Value

Higher value, stronger territorial resilience

This path combines premium tourism with broader local participation and stronger long-term planning. The goal is to further develop a successful tourism sector and a stronger regional economy.

Infrastructure improvements could lift the entire region of Patagonia, including for visitors. More businesses participate in value creation. Local entrepreneurship grows. Tourism connects with food systems, culture, science and community life.

This, however, requires modernization: stronger digital infrastructure, formal sustainability systems, dynamic pricing, AI-supported visitor management and smarter territorial planning. Growth becomes ‘smarter’ and more evenly distributed.

It also addresses one of the region’s structural gaps, namely low levels of domestic tourism. Today, Chilean visitors remain underrepresented (<1% domestic vs. >7% international)¹ in Patagonia. A stronger national tourism strategy would ease dependence on international demand and create greater year-round stability.

The transition is also institutional. A trend away from concentrated control and toward stronger business ecosystems would be beneficial. Creating more local businesses, and more broadly strengthening the local economic fabric, makes the entire community more resilient.

¹ % total visitors of Magallanes and Chilean Antarctic Region in 2024 [Domestic tourism dashboard, SERNATUR vs. International tourism dashboard, SERNATUR](#)

Invitation for Action

LET'S BUILD THE FUTURE TOGETHER

Patagonia has the opportunity to lead the future of high-value, nature-based tourism. The strongest destinations are not those that grow fastest. They are the ones that take the necessary steps to safeguard what makes them unique. For Patagonia, that means nature, community, territorial identity and a shared long-term vision.

[EHL Hospitality Business School](#), ranked the world's #1 hospitality management university, connects academic research with practical decision-making for destinations, industry leaders and policymakers. Our work focuses on helping regions translate tourism growth into stronger local economies, better governance and long-term competitiveness.

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*The future of tourism in Patagonia
will be shaped locally, but its
relevance is global.*

The opportunity is here.

The decisions start now.

”



Methodological Note

The research underpinning this white paper combined qualitative fieldwork with secondary statistical analysis to develop a grounded understanding of tourism transformation dynamics across Chilean Patagonia and Antarctic gateway territories.

Stakeholders were selected to capture a broad range of institutional, operational and territorial perspectives on tourism development across the region.

Field research was conducted over a two-month period, including a three-week field visit across the region in February 2026. The study included more than 30 semi-structured interviews carried out both onsite and online with representatives from tourism businesses, public institutions, conservation organizations, logistics providers, indigenous organizations and scientific communities connected to Antarctic access and regional development. Research activities took place across Punta Arenas, Puerto Natales, Puerto Williams, Torres del Paine and surrounding coastal and maritime territories.

Interviews explored themes related to destination transformation, infrastructure capacity, environmental pressures, governance coordination, investment priorities and long-term development scenarios. The objective was not to produce a comprehensive inventory of tourism activity, but to identify recurring patterns, structural tensions and emerging strategic challenges shaping the region's future trajectory.

Qualitative analysis was conducted using NVivo and followed an iterative coding process inspired by grounded theory approaches.

Analysis evolved across three overarching thematic dimensions that ultimately informed the structure of the white paper itself:

- Current priorities: including themes such as first signals of change, tourism transformation, competitive differentiation and the distinct positioning of Chilean Patagonia
- Emerging pressure points: including infrastructure constraints, rising demand, environmental pressures, territorial fragility, quality-of-life tensions and conservation challenges
- Future development model: including investment priorities, tourism diversification, destination positioning beyond Torres del Paine, workforce capabilities and the transition toward a higher-value tourism model

Qualitative insights were complemented by official tourism statistics from the Anuario de Turismo 2024 published by the Subsecretaría de Turismo and SERNATUR, together with historical visitation data for Torres del Paine National Park and other protected areas across the region. Additional secondary materials included regional planning documents, public investment reports and tourism development strategies relevant to Patagonia and Antarctic gateway operations.

The combination of field-based evidence and statistical analysis allowed the study to connect lived territorial realities with measurable tourism dynamics, providing a stronger basis for evaluating where current development models are creating value, where constraints are intensifying and where future strategic attention may be required.

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Solo Expediciones

Errante Ecolodge

Aerovías DAP

Australis Cruises

B&M Agencia Marítima S.A.

Grupo Costa Australis

Comunidad indígena Yagan

Hotel Forjadores

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