

# DESARROLLO ESTRATÉGICO DE DESTINOS TURÍSTICOS DE NATURALEZA



NOVEMBER 24th, 2010



# Scope Of Today's Presentation

**PART 1: TOURISM TODAY - HEADLINES**

**PART 2: NATURE TOURISM DESTINATION DEVELOPMENT**

**PART 3: A WORD ABOUT CNN TASK**

TRAVEL HAS BECOME AN ESSENTIAL PART OF OUR LIVES



IT KEEPS US CONNECTED TO ONE ANOTHER



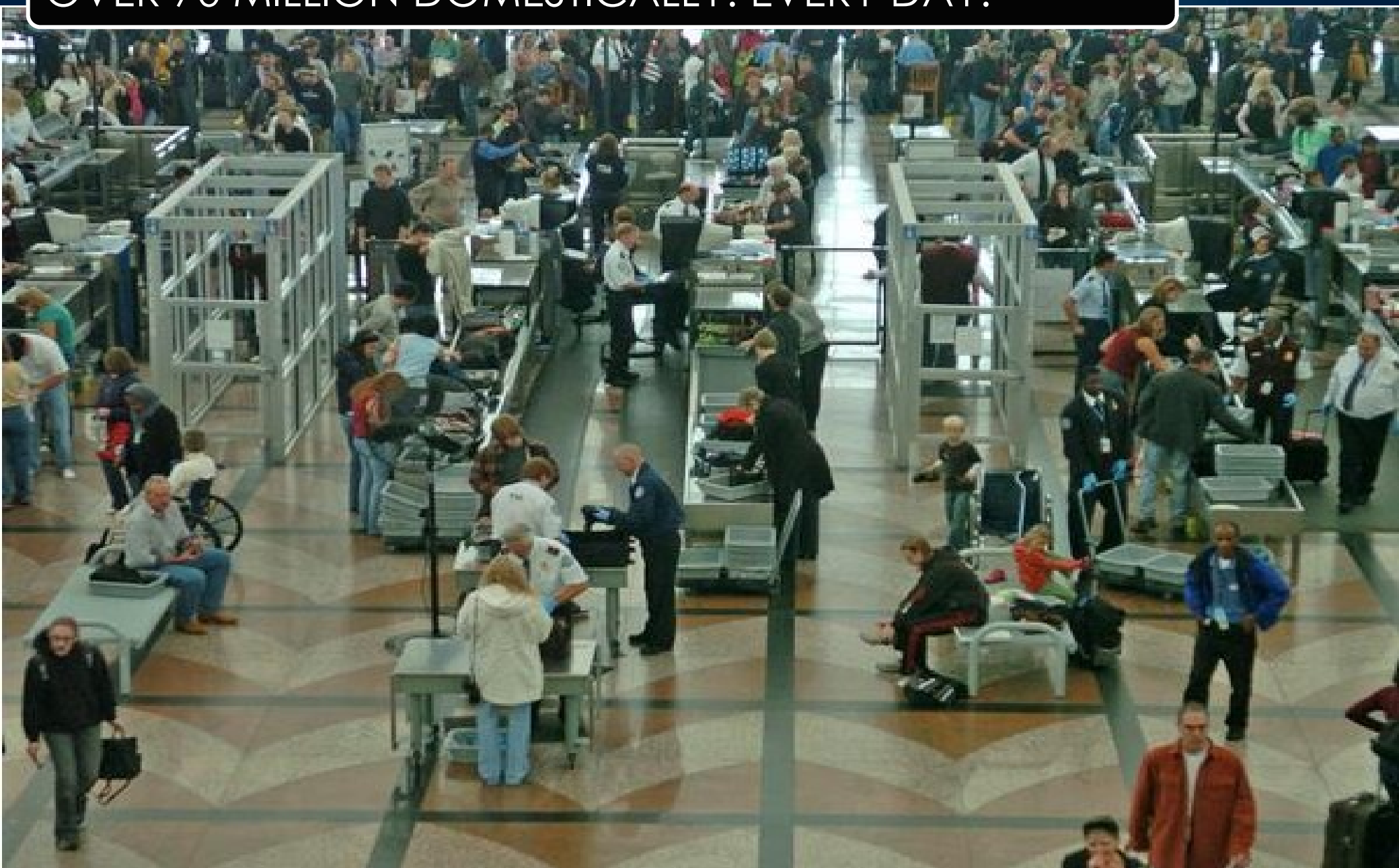
AND CREATES OPPORTUNITY



IN 2009 OVER 800 MILLION PEOPLE TRAVELLED  
INTERNATIONALLY - OVER 7 MILLION PEOPLE EVERY DAY...



OVER 70 MILLION DOMESTICALLY. EVERY DAY!



GROWTH IS OCCURRING IN BOTH DIRECTIONS: WEST IS EXPLORING EAST, EAST IS PLAYING WEST.



THE BOTTOM LINE...

**T&T is the *fastest growing*  
economic sector in the  
world.**

THE TOURISM ECONOMY IS AN INVALUABLE SOURCE OF  
STRENGTH...



Importantly, Tourism Means Jobs

**1 IN 12 JOBS**



Revenues

**9.4%**  
**GLOBAL GDP**

The background of the slide is a close-up photograph of several folded pieces of colorful, striped fabric, likely traditional Peruvian textiles. The colors include shades of orange, red, yellow, green, and purple, arranged in various patterns of stripes and blocks. The texture of the fabric appears to be a coarse weave.

Trade

**10.9% EXPORTS**

Investment

**9.6% CAPEX**



# Government Expenditure

A photograph of a large stadium under construction at night. The tiered seating area is visible, with several workers on the ground level. One worker in a white shirt is swinging a sledgehammer, while others in hard hats stand nearby. The stadium lights are on, illuminating the scene.

**3.8%**

SOURCE: WTTC

## Creating National Unity



And Destination Pride



Increasing National Competitiveness



## (Re)defining National Identity



And Strengthening Global Diplomacy



HOWEVER...THE GLOBAL ECONOMIC CRISIS OF 2008/9  
SEVERELY HIT THE TOURISM INDUSTRY



TRAVELLERS SIMPLY COULD NO LONGER TRAVEL, FOR BUSINESS OR PLEASURE.



SADLY THE MONEY WAS NOT THERE, EVEN IF THE DESIRE WAS.

Time Flight Gate Destination 07:42

0715 SK4007	Stavanger	Cancelled
0715 SK249	Bergen	Cancelled
0715 D1602	Bergen	Cancelled
0715 D1742	Trondheim	Cancelled
0740 SK205	Kristiansund	Gate closed
0740 D1422	Molde	Cancelled
0740 SK3314	Åsund	Cancelled
0750 D1286	Haugesund	Cancelled
0750 D1406	Åsund	Cancelled
0750 WP177	Ørsta-Volda	Cancelled

Time Flight Gate Destination

0755 R6601	Fagernes	Cancelled
0800 D1604	Bergen	Cancelled
0800 SK2301	Kristiansund	Cancelled
0800 SK251	Bergen	Cancelled
0800 SK4009	Stavanger	Cancelled
0800 WP123	Førde Bergen	Cancelled
0800 SK4406	Tromsø	Cancelled
0805 SK332	Trondheim	Cancelled
0805 D1744	Trondheim	Cancelled
0810 D1524	Stavanger	Cancelled

Time Flight Gate Destination

0815 SK208	Haugesund	Cancelled
0820 D1372	Kristiansund	Cancelled
0825 SK4011	Stavanger	Cancelled
0825 SK4104	Bodo	Cancelled
0830 D0042	Stord	Cancelled
0830 D0032	Flore	Cancelled
0840 SK336	Trondheim	Cancelled
0840 SK4516	Molde	Cancelled
0845 D1202	Bodo	Cancelled
0850 D1606	Bergen	Cancelled

Time Flight Gate Destination

0850 D1746	Trondheim	Cancelled
0855 WP145	Sogndal	Cancelled
0855 SK4472	Kirkenes	Cancelled
0900 D1232	Harstad/Narvik	Cancelled
0900 D1742	Tromsø	Cancelled
0900 SK4061	Harstad/Narvik	Cancelled
0915 D1272	Kirkenes	Cancelled
0915 SK257	Bergen	Cancelled
0920 SK211	Kristiansund	Cancelled
0925 D1526	Stavanger	Cancelled



**I  
NEED  
A HOLIDAY**



**NOW!**

ONE OF THE MOST DAMAGING ASPECTS TO THE TOURISM INDUSTRY HAS BEEN THE COLLAPSE OF BUSINESS TRAVEL



BUSINESS STOPPED, SO BUSINESSES STARTED CUTTING COSTS



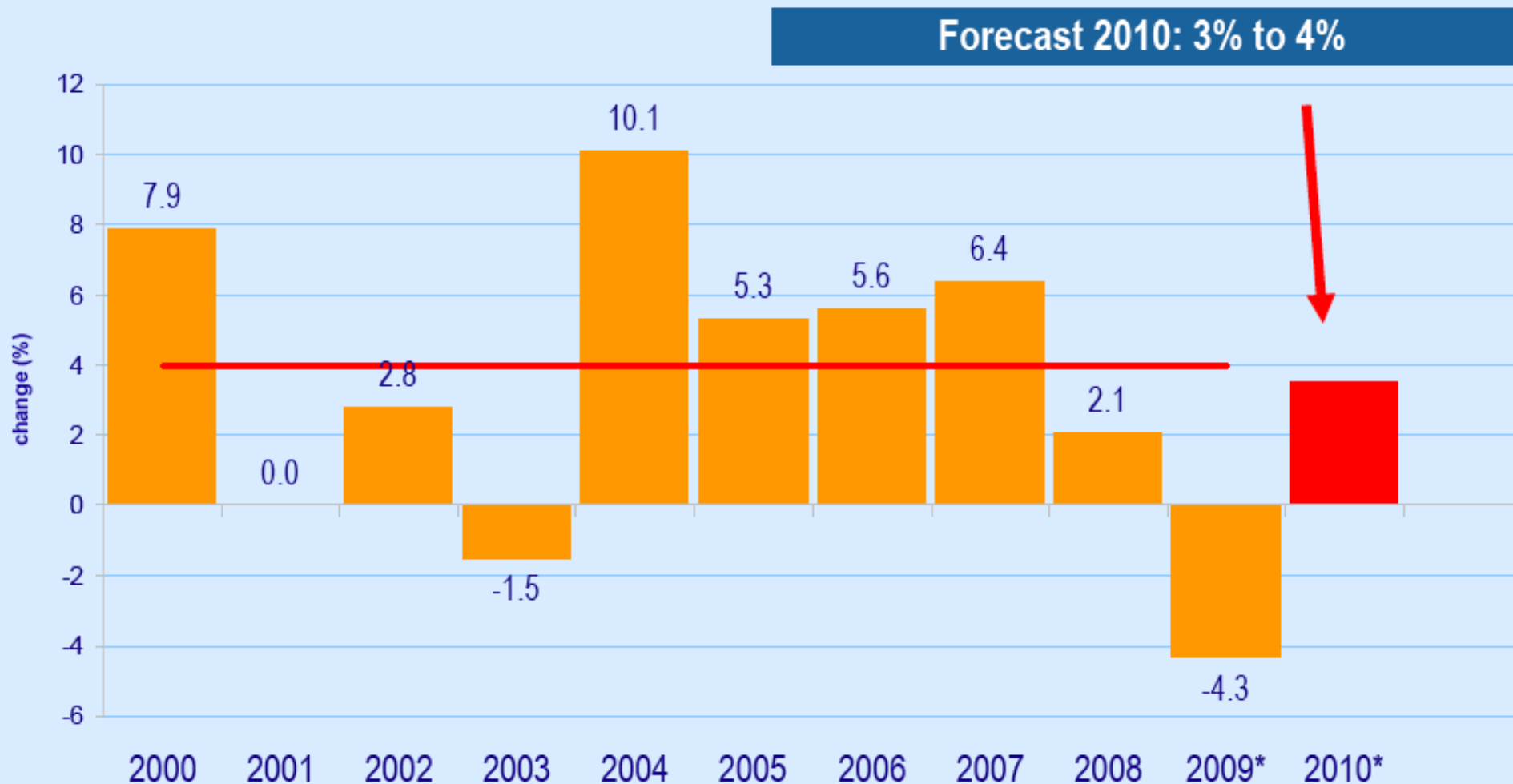
2010, HOWEVER, IS PROVING TO BE A YEAR OF RECOVERY



AS ECONOMIES STRENGTHEN THE WORLD IS STARTING TO  
MOVE AGAIN



# A QUICK LOOK AT THE PAST DECADE OF TRAVEL

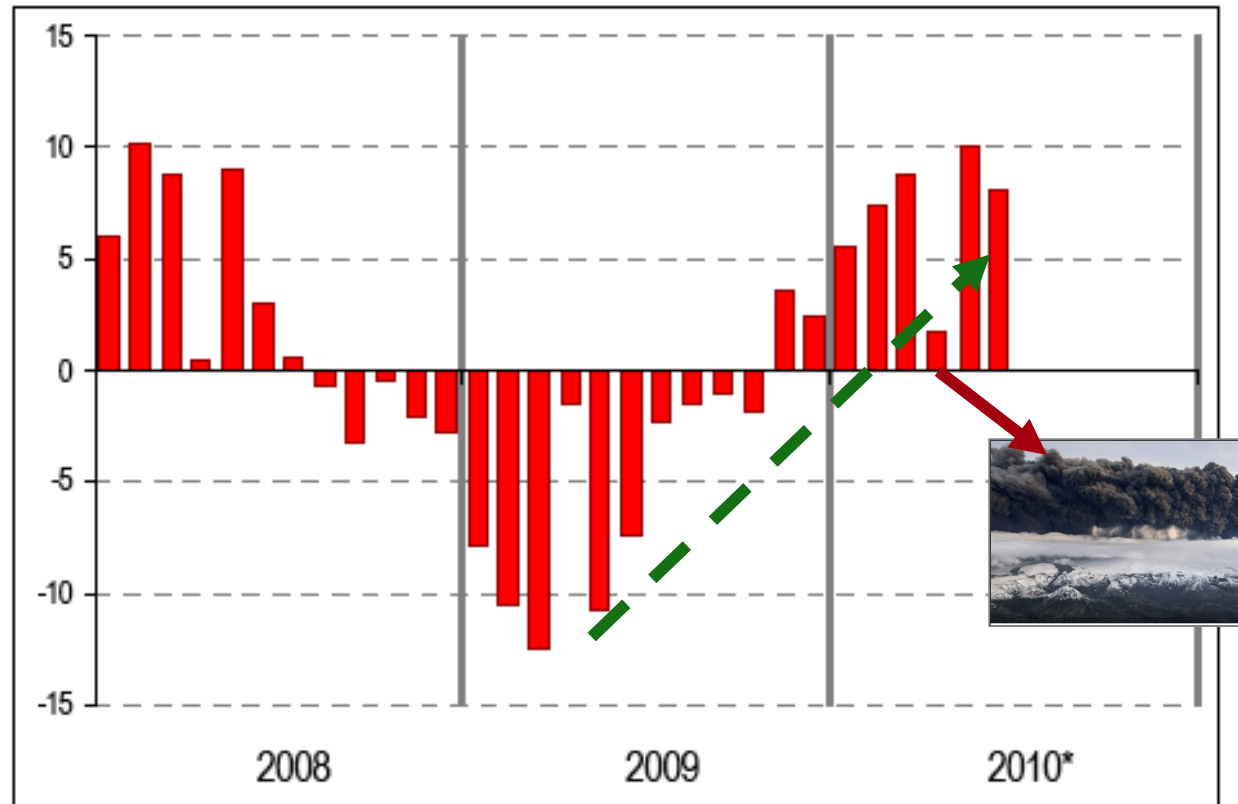


# MONTHLY PERFORMANCE STRENGTHENS WITH MOMENTUM AND CONSISTENCY

International Tourist Arrivals, monthly evolution

World

(% change)



Source: World Tourism Organization (UNWTO) ©

# LATEST RESULTS SHOW REASON FOR CONTINUED CONFIDENCE

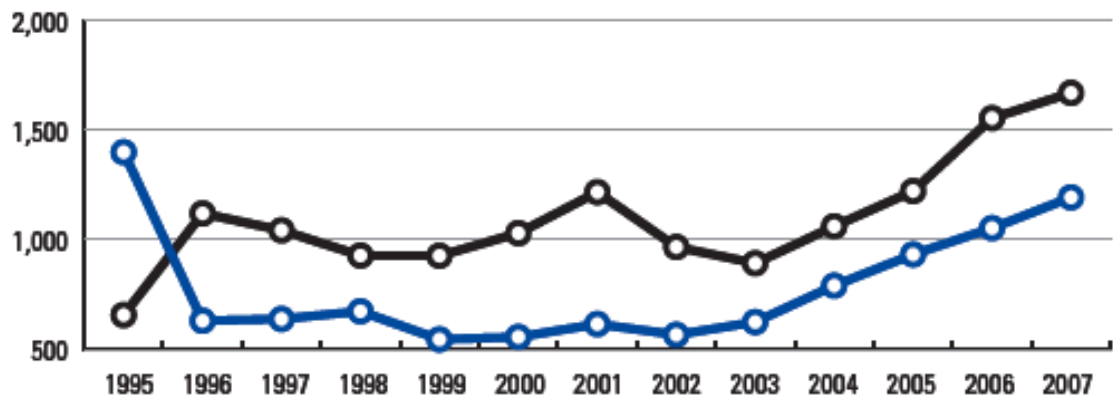
## FIRST HALF-YEAR RESULTS 2010 (J-J)

- **WORLD** + 7%
- AFRICA + 7%
- AMERICAS + 7%
  - CENTRAL AMERICA: +9%
  - NORTH AMERICA: +8%
  - SOUTH AMERICA: +6%
  - CARIBBEAN: +4%
- ASIA-PACIFIC + 14%
- EUROPE + 2%
- MIDDLE EAST + 20%

SOURCE: UNWTO

# COLOMBIA: PERFORMANCE

International tourist arrivals (thousands), 2007.....1,193  
International tourism receipts (US\$ millions), 2007 .....1,669



International tourist arrivals (thousands)  
International tourism receipts (US\$ millions)

T&T % GDP: 1.9  
T&T % EMPLOYMENT: 1.8

Source: United Nations World Tourism Organization

2010 YTD (TO JUNE 2010): + 5.2%

SOURCE: UNWTO

SECRETS LEARNED.....



# D.I.Y. TRAVEL MAKES SENSE AND SAVES MORE THAN JUST CENTS



THE TRAVELLER IS THE HERO - SERVICE IS AN EXPECTATION AT ALL LEVELS



FREE OFFERS ARE MORE VALUABLE THAN % DISCOUNTS



LAST MINUTE IS WORTH THE WAIT



AIR MILES ARE TRAVEL CURRENCY



SOFT CURRENCY MARKETS ARE INVALUABLE



HOLIDAYS ARE ONE OF THE LAST FEW TIMES FOR FAMILY TIME



MARKING MOMENTS JUSTIFIES THE EXPENSE



# BUSINESS HAPPENS IN BUSINESS CLASS



TRAVELLER VOICE IS GETTING LOUDER AND LOUDER...



tripadvisor®

get the truth. then go.®

SOCIAL MEDIA IS A SECONDARY MARKETING TOOL. BRAND BUILDING THROUGH TV / ONLINE ADVERTISING IS STILL PRIORITY.

# facebook



TIME OUT IS AN IMPORTANT PERSONAL INVESTMENT



CONSCIENCE IS GROWING, IN APPROACH AND ACTIVITY



# Scope Of Today's Presentation

**PART 1: TOURISM TODAY - HEADLINES**

**PART 2: NATURE TOURISM DESTINATION DEVELOPMENT**

**PART 3: A WORD ABOUT CNN TASK**

# NATURE TOURISM - WHAT DOES THAT MEAN?

Nature Tourism - another name for **ECO-TOURISM** - has become a very popular form of travel.

The scope of Nature Tourism opportunity is as broad and deep as the world on which we live...

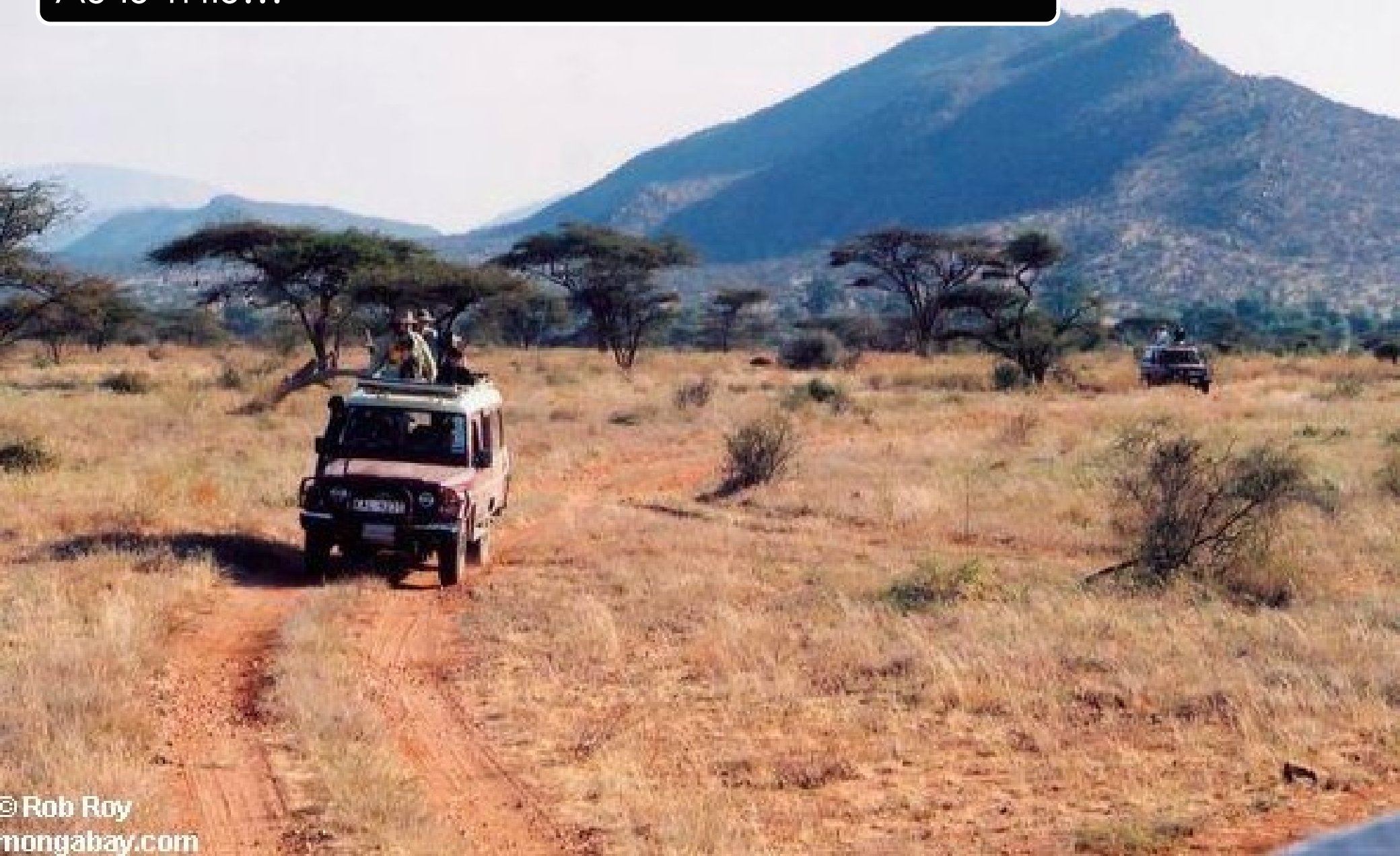
THIS IS NATURE TOURISM...



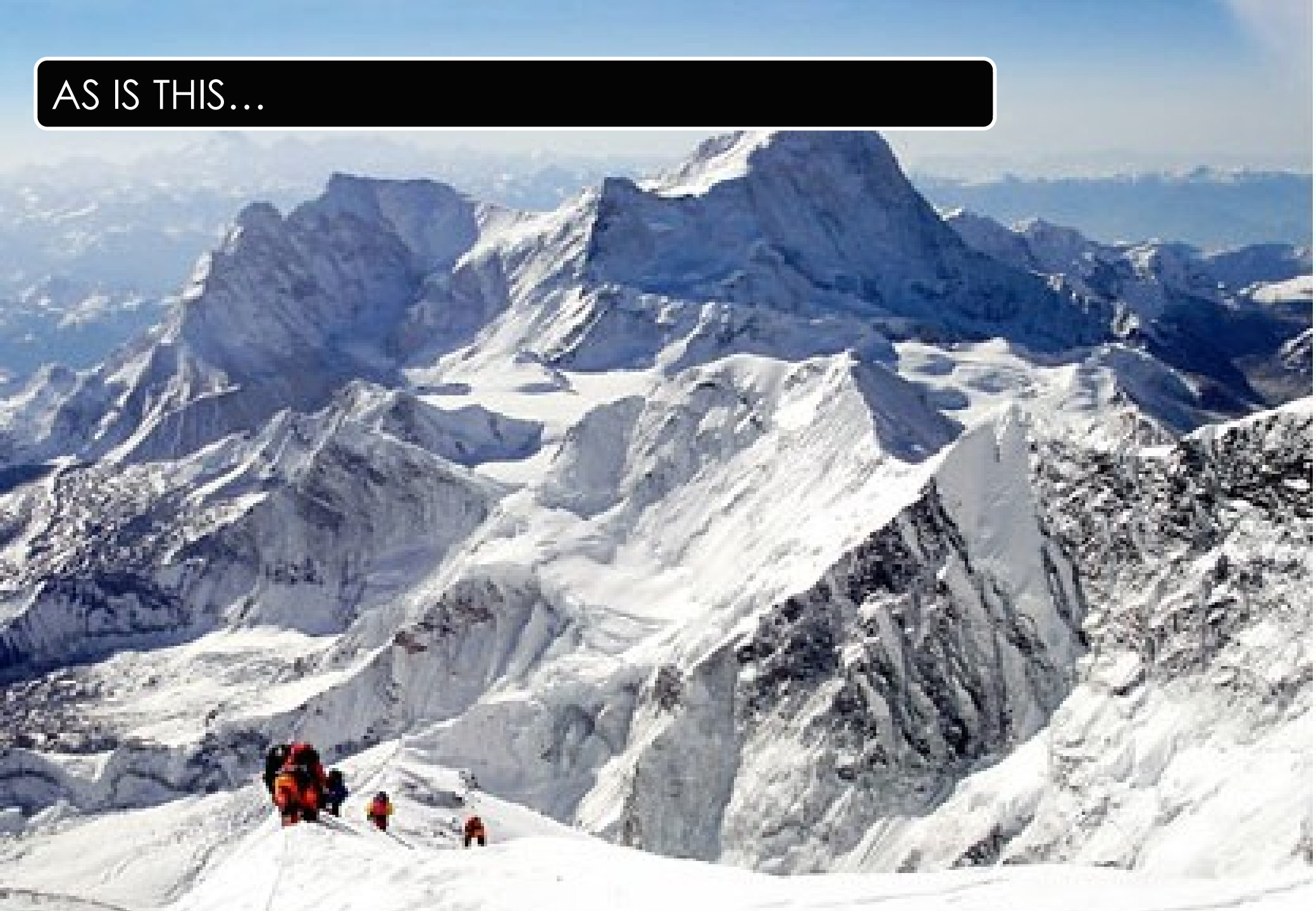
AS IS THIS...



AS IS THIS...



AS IS THIS...



AS IS THIS...



AS IS THIS...



AND ALSO THIS...



# NATURE TOURISM AS A PROPOSITION

To be a Nature Tourism destination requires not only...

- **UNIQUE** NATURAL ENVIRONMENT
- **ESTABLISHED** ECO-TOURISM INFRASTRUCTURE
- **PRIORITISATION** OF ECO-TOURISM BY THE INDUSTRY
- **NO CLEAR CONTRASTS** TO THE PHILOSOPHY AND PRACTICES OF ECO-TOURISM

Also required is...

# GUIDING PRINCIPLES OF NATURE TOURISM

A destination is truly focused on Nature Tourism when:

- **EDUCATING** ON THE NATURAL & CULTURAL ENVIRONMENT
- **SUSTAINING** RESOURCES & CULTURE
- INVOLVING AND UPLIFTING **LOCAL COMMUNITIES**
- **RESPECTING** LOCAL PEOPLE
- ACHIEVING **INDUSTRY GROWTH**, INCLUSIVITY & PROFITABLY

# DEVELOPING A NATURE TOURISM DESTINATION

To be a Nature Tourism destination **the principles must be at the heart of *everything* you:**

- BELIEVE
- SAY
- DO
- PROMOTE
- EXPERIENCE
- INVEST

# NATURE TOURISM BRANDING - A NATURAL OPPORTUNITY

For COLOMBIA a unique opportunity to extend an **INVITATION** to visit exists through Nature Tourism:

- DIVERSITY
- PRIDE
- TOURISM EXPERIENCES
- MESSAGES
- CONNECTION TO THE 'NATURE' THEME

*“COLOMBIA  
Is Passion,  
Naturally”*

# COLOMBIA NATURE TOURISM PLATFORM

Brand Positioning Strengths:

*“COLOMBIA Is Pasión,  
Naturally”*

- Connects to existing country Brand
- Ownable
- Business & Leisure applicable
- Campaignable

# COLOMBIA NATURE TOURISM PLATFORM

## Key Audiences:

- International travellers
- Domestic travellers
- Tourism officials
- Tourism industry
- Business community
- Media

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# MEETING CLIENT NEEDS

- In-House Travel & Tourism Consulting Service
- Focus on Tourism & Economic Development:
  - Strategy
  - Creative
- Fully complimentary service to Clients and Non-Clients
- No media buying conditions
- No sales mandate
- Fully confidential

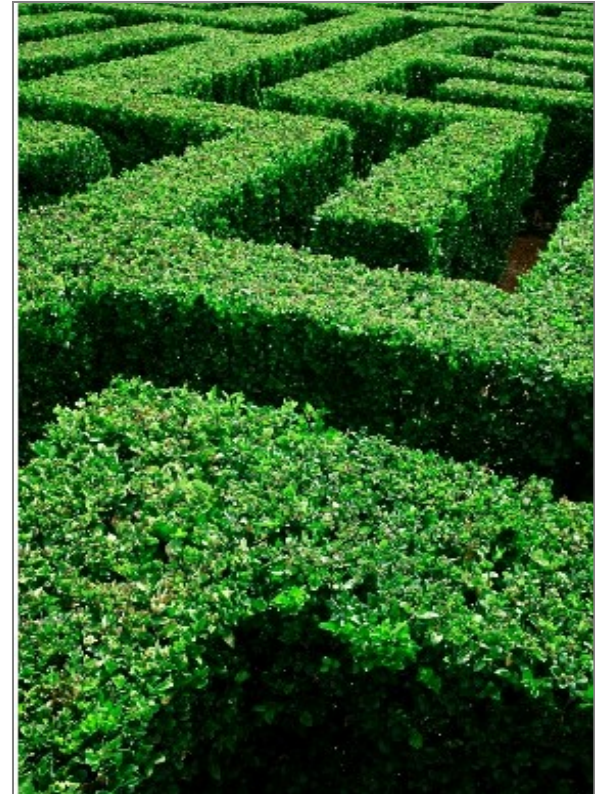


# HOW WE HELP

## TOURISM STRATEGIES:

The CNN TASK Group has established, global expertise in the **development of Growth Strategies** for Tourism which drive the overall economic development mandate of the Destination, ensuring alignment to:

- key Sectors and Stakeholders
- supporting Tourism Events, Attractions and Services.



# HOW WE HELP

## BRAND AND COMMUNICATIONS :

The CNN TASK Group has worked extensively with Destinations, Events, Properties and Attractions in the **development of new and evolved BRANDING**, including:

- Positioning
- Refinement
- Creative application in Media
- Competitive evaluation



# HOW WE HELP

## CRISIS MANAGEMENT & RECOVERY MESSAGING:

Across the globe the CNN TASK Group has offered invaluable support to Destinations facing challenges to Tourism sector stability and growth as a result of, inter alia, natural disasters and conflict.

The CNN TASK Group provides **critical strategic and creative direction** in the development and placement of messaging key to shifting of perceptions, sector awareness and industry recovery.



# HOW WE HELP

## IMPACT OF CAMPAIGNS:

Recognising the importance for Clients of realising strong ROI on media campaigns, and the ongoing need for media to truly *deliver* on qualitative and quantitative objectives, the CNN TASK Group offers timeous, **rigorous analysis of Media Campaigns**, providing valuable Brand and Messaging:

- Insight
- Direction for future communications activity



# HOW WE HELP

## KNOWLEDGE TRANSFER:

In addition the TASK Group is actively involved in **building Tourism sector knowledge, insight and respect around the importance of Tourism** through:

- Presentations
- Speeches
- Panel Discussions
- Client training programmes
- Publishing



# GLOBAL REACH OF TASK




# PARTNERS IN TOURISM GROWTH




WORLD TOURISM ORGANIZATION  
ORGANISATION MONDIALE DU TOURISME  
ORGANIZACIÓN MUNDIAL DEL TURISMO  
ВСЕМИРНАЯ ТУРИСТСКАЯ ОРГАНИЗАЦИЯ  
منظمة السياحة العالمية


# WHERE TO FIND US

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 **tourism advertising solutions & knowledge**


## Welcome to CNN's Tourism Advertising Solutions and Knowledge (TASK) Group.


An added value service to clients, the TASK Group works directly with its clients, both new and established, to create impactful, strategic solutions beyond advertising. It is a team set to provide excellence in strategy and media solutions for the world's tourism and economic development hot spots.

Some of the core solutions we provide our clients:

Tourism sector intelligence	Bespoke solutions to media and creative briefs	Marketing expertise	Audience insights
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CNN is proud to continue setting the standards for excellence with this new turn-key solution, building long-term strategic partnerships in the world of tourism and economic development.


**introductory brochure** 


**compass**   
Insights Into Tourism Branding


For more information about the TASK Group and how it can help your business, please [e-mail us](#)

[Our Partners](#)

 **UNWTO**

 **eTurboNews**

  
**task group**

 **tourism advertising solutions & knowledge**

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# GRACIAS

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