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.
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
9.4% Revenues

GLOBAL GDP
10.9% EXPORTS
Investment

9.6% CAPEX
Government Expenditure

3.8%
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.
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

Forecast 2010: 3% to 4%

Source: World Tourism Organization (UNWTO)
MONTHLY PERFORMANCE STRENGTHENS WITH MOMENTUM AND CONSISTENCY

International Tourist Arrivals, monthly evolution

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%
- ASIA-PACIFIC + 14%
- EUROPE + 2%
- MIDDLE EAST + 20%

- CENTRAL AMERICA: +9%
- NORTH AMERICA: +8%
- SOUTH AMERICA: +6%
- CARIBBEAN: +4%

SOURCE: UNWTO
COLOMBIA: PERFORMANCE

2010 YTD (TO JUNE 2010):  + 5.2%

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

Source: United Nations World Tourism Organization

SOURCE: UNWTO
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...
SOCIAL MEDIA IS A SECONDARY MARKETING TOOL. BRAND BUILDING THROUGH TV / ONLINE ADVERTISING IS STILL PRIORITY.
TIME OUT IS AN IMPORTANT PERSONAL INVESTMENT
CONSCIENCE IS GROWING, IN APPROACH AND ACTIVITY
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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...
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…
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
To be a Nature Tourism destination the principles must be at the heart of everything you:

• BELIEVE
• SAY
• DO
• PROMOTE
• EXPERIENCE
• INVEST
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”
Brand Positioning Strengths:

“COLOMBIA Is Passion, Naturally”

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

- International travellers
- Domestic travellers
- Tourism officials
- Tourism industry
- Business community
- Media
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• 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
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.
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
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.
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
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
PARTNERS IN TOURISM GROWTH

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

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.

For more information about the TASK Group and how it can help your business, please e-mail us.
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For Further Information Contact:
cnnTASK@turner.com