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# Sustainable Tourism Policy: Together with Nature

*Executive Summary*



# Sustainable Tourism Policy: Together with Nature

## Executive Summary

The complete technical policy document can be found on the **Ministry of Commerce, Industry and Tourism** website:

[www.mincit.gov.co](http://www.mincit.gov.co)

### **José Manuel Restrepo Abondano**

Minister of Commerce, Industry and Tourism

### **Julián Guerrero Orozco**

Vice-Minister of Tourism

### **Nobora Constanza Olaya Cantor**

Director of Quality and Sustainable Tourism Development

### Coordinator and editor

### **Cristina Arbeláez Restrepo**

Adviser to the Office of the Vice-Minister of Tourism

### Project team

#### **Arturo Bravo**

#### **Jenny Paola Gallo**

#### **Liseth Catherine Sánchez**

#### **Luis Jonathan Pardo**

#### **Francisco Javier Rivera**

### Design and layout

#### **.Puntoaparte Editores**

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The Ministry of Commerce, Industry and Tourism is committed to strengthening the sustainability of the tourism sector in Colombia. This policy is a manifestation of that commitment and of our belief that Colombia's unique natural assets should be the drivers of development in the sector.

2019 was a historic year for tourism in Colombia. This, together with the country's enormous potential for growth, is what drives us to keep working to reactivate the sector and generate sustained growth. It also makes us ask ourselves: What type of tourism do we want for Colombia?

The Sustainable Tourism Policy is our response to that question. By understanding sustainability as a key part of development, competitiveness and tourism's growth, this policy will transform regions, tourism businesses, communities and tourist behavior. To this end, the Sustainable Tourism Policy recognizes that Colombia's nat-

ural values are our best asset in developing a successful long-term tourism sector in which travelers can continue to marvel at the different corners of Colombia, while at the same time we protect our communities' heritage so that all Colombians can continue to benefit from a sector that truly is a driver for development.

We are now one of the few countries in the world with a Sustainable Tourism Policy that enables us to forge a path towards a more responsible, inclusive, resilient and collaborative future, in which tourism energizes the economy, improves social inclusion, and preserves culture and the environment. We ask that you protect Colombia's natural assets, that you continue traveling responsibly in our country and that you join us in our commitment to build a sustainable tourism sector.

**José Manuel Restrepo Abondano**  
**Minister of Commerce, Industry and Tourism**



# Let Us Travel and Protect Our Planet

Colombia is a country of extraordinary environmental richness; It has five regions, two oceans, three mountain ranges, 314 ecosystems, more than 1,000 protected areas, almost 2,000 bird species, 3,179 orchids, and countless additional features that make up a natural heritage hard to find anywhere else in the world. Travelers to Colombia are surrounded by unmatched natural treasures as they immerse themselves in fascinating, meaningful and inspiring experiences. In Colombia, as John Ruskin rightly said, "Nature is painting for us, day after day, pictures of infinite beauty".

It has become evident in recent years, and more so during the Covid-19 pandemic, that developing sustainable tourism is both a responsibility and an opportunity in Colombia. On the one hand, the tourism industry must contribute to preserving the country's natural capital and ecological values to the same degree that it uses them to carry out its activities. On the other hand, it currently has the opportunity to become one of the main drivers of social and economic change in the country, as well as an instru-

ment for the conservation of its natural environment, biodiversity, landscapes, ecosystems and exceptional natural resources.

There is widespread acceptance globally that the world is at an environmental tipping point, and that people's future wellbeing and economic progress will only be possible if the natural capital is placed at the forefront of governmental and productive sector decision-making. The Sustainable Tourism Policy lays the foundations for this goal in Colombia.

'Together with Nature' seeks to unite all industry stakeholders towards the goal of developing sustainable tourism in Colombia. This is both a tribute to and a recognition of the way nature brings us together and makes tourism a memorable experience in a country rich in biodiversity, landscapes, geography and unique natural resources. We are all responsible for making tourism grow in a way that is better for the planet and that allows us, and future generations, to continue to enjoy Colombia's priceless natural capital.

The Sustainable Tourism Policy is a long-term strategic vision for the sector that places sustain-

ability at the heart of tourism development in the country, positions it as a competitive factor for destinations and tourism businesses, and strengthens Colombia's reputation and recognition as a world-class sustainable tourism destination.

The policy consists of a strategic plan to 2030 and is comprised of six strategies that have been designed in response to identified barriers to sustainable tourism development. The strategies include 14 programs, 32 projects and 140 policy actions. The policy's implementation timeline is consistent with the global Agenda for Sustainable Development, the National Development Plan 2018-2022 (Pact for Colombia, Pact for Equity), and other domestic policies, plans and programs. This roadmap will establish tourism as a sustainable productive activity that improves the country's competitiveness by responsibly using one of its main strategic assets: its natural capital.

We are confident that the Sustainable Tourism Policy will ensure that sustainability is the guiding principle for developing and strengthening Colombia's

tourism sector, and we invite all stakeholders in the tourism value chain to unite around this objective. We ask that National Government agencies develop the tools and procedures required to implement this policy, and that regional authorities plan and manage tourism using sustainability criteria to make destinations more competitive. We invite the private sector to implement sustainability strategies that improve the productivity and competitiveness of its business models, and invite academic institutions to promote research and innovation that generate specialized knowledge in support of sustainable tourism initiatives. Finally, we call on local communities to preserve their regions' natural capital, and ask that tourists and citizens in general become more aware of the need to adopt sustainable consumption habits and behaviors with regard to the country's natural capital.

Let us be part of the solution to the challenges facing humanity, and let sustainability be the purpose that unites us around tourism.

**Julián Guerrero Orozco FLS**  
**Vice-Minister of Tourism**



# Why Visit Colombia?

*Colombia is a hugely diverse country with a privileged geographical location, rich landscapes, ecosystems and natural resources, and a multitude of cultures.*

Colombia is the second most biodiverse country in the world, surpassed only by Brazil. However, its smaller size makes Colombia the most biodiverse country in the world per square meter.

Colombia is located on the northwest tip of South America. It is one of 21 countries in the world with coastlines on two oceans (the Atlantic and the Pacific). It has a stable climate all year round with no extreme seasonal temperature changes. Colombia has five natural regions, 314 ecosystems, six snow-capped peaks, three mountain ranges and climates ranging from freezing perpetual snow to sea-level tropical heat. The country has land borders with Panama, Venezuela, Ecuador, Peru and Brazil, and maritime

boundaries with Costa Rica, Nicaragua, Honduras, Jamaica, Dominican Republic and Haiti.

## The Varied Climate of a Country with no Seasons

Although Colombia has no seasons, its climate is not static. Some months are rainy, others are warm or temperate; There are regions where the heat is excessive and others where the cold is constant. This variety of climates is due to Colombia's five climate zones (warm, temperate, cold, paramo, glacial) in which temperature varies with altitude.



### Social Indicators

- Population:** 48.2 million (DANE, 2019)
- Official language:** Spanish
- Recognized languages:** 68 native languages
- National tree:** Wax Palm
- National bird:** Andean Condor
- National flower:** Orchid
- Currency:** Colombian peso (COP)
- Country code:** +57
- National heritage sites:** 1,102 throughout the country
- Natural and cultural World Heritage sites:** 8
- Intangible cultural heritage:** 9
- Time zone:** (UTC-5) throughout the country, all year round



- Total area:** 2,070,408 km<sup>2</sup>
- Land area:** 1,141,748 km<sup>2</sup>
- Maritime area:** 928,660 km<sup>2</sup>



# Tourism in Numbers

## In the World

In 2019, the tourism industry grew by **3.5%** while the global economy grew by **2.5%**.



In 2019, the tourism industry accounted for **28.3%** of global trade in services and **4.3%** of capital investment.



In 2019, tourism contributed **10.3%** to global gross domestic product (GDP), which amounted to **USD \$8.9 trillion**.



In 2019, **1.5 billion** international tourist arrivals were reported worldwide, an increase of **4%** compared to 2018 and the tenth consecutive year of growth.



In 2019, **1 in 10** jobs were generated by the tourism industry, representing **330 million** jobs worldwide.



## In Colombia

*Tourism is the country's second largest foreign currency generator, surpassing traditional products like coffee, flowers and bananas altogether.*

Tourism contributes **2.15%** to domestic GDP, and grew by

**48.9%** between 2015 and 2019.



In 2019, the added value of accommodation and food services grew by

**4.7%** compared to 2018, reaching **\$34.1 billion**.



During the same period, foreign exchange income from travel and air passenger transport grew by

**2.4%** to a total of **USD \$6,786 million**.



In 2019, non-resident visitors grew by **3%** compared to 2018, reaching a record number of **4.5 million**.



In 2019, the tourism industry accounted for **618,000 full-time jobs**, or approximately **3%** of domestic employment.



Growth in tourism represents significant opportunities for the country's economy and that of its regions, for job creation, for developing productive initiatives, and for the social inclusion of communities. However, it is crucial that growth in this sector is sustainable and that tourism positively contributes to local communities' wellbeing, to developing better ecosystem services, and to preserving and protecting the natural capital that makes it possible.

\* Global data obtained from WTTC and UNWTO. Colombian data obtained from the Tourism Satellite Account, national DANE accounts, Banco de la República and Colombian Immigration Authority.

# Colombia: Megadiverse Country and Global Water Powerhouse

Colombia is the **second** most biodiverse country in the world.

It has **314 types** of ecosystem.

It is the only country in South America with access to two oceans, and one of **21 countries** in the world with this feature.

It is **sixth** on the global ranking of countries with the most water resources.

It is in the top **15 countries** with the largest forest cover.

It has the **greatest diversity of birds** and orchids in the world, the second highest diversity of amphibians, butterflies and plants, the third highest diversity of reptiles and palm trees, and the sixth highest diversity of mammals.

It has a National Protected Area System with **1,327 protected areas** that cover 15.2% of the country.



It has **3,330 km of coastline**, two littoral zones, and a 300km<sup>2</sup> insular region with 8 sub-regions.

It is famous for its **36 páramos** that provide 70% of the population's water.

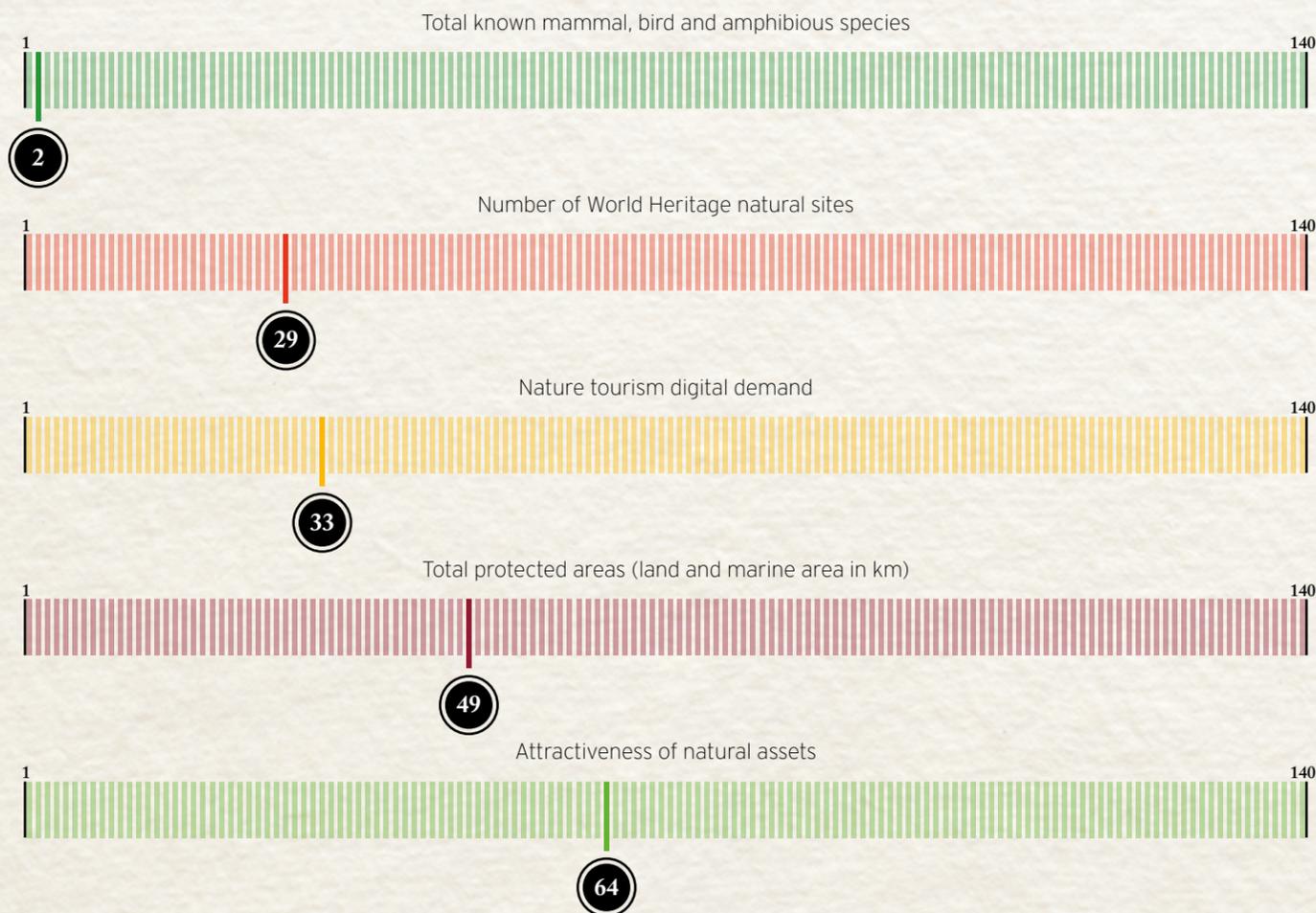
It has **22 million hectares of wetlands** and 299,000 hectares of mangroves.

*The relationship between tourism and Colombia's rich natural resources brings with it an enormous conservation responsibility. Since a large part of global tourism is concentrated around areas with vulnerable ecosystems, such as marine spaces and coastal or mountainous areas, it is important that the industry guarantees to protect their biodiversity. This means that tourism activities need to be carefully planned and executed to control and limit any potential negative impact.*

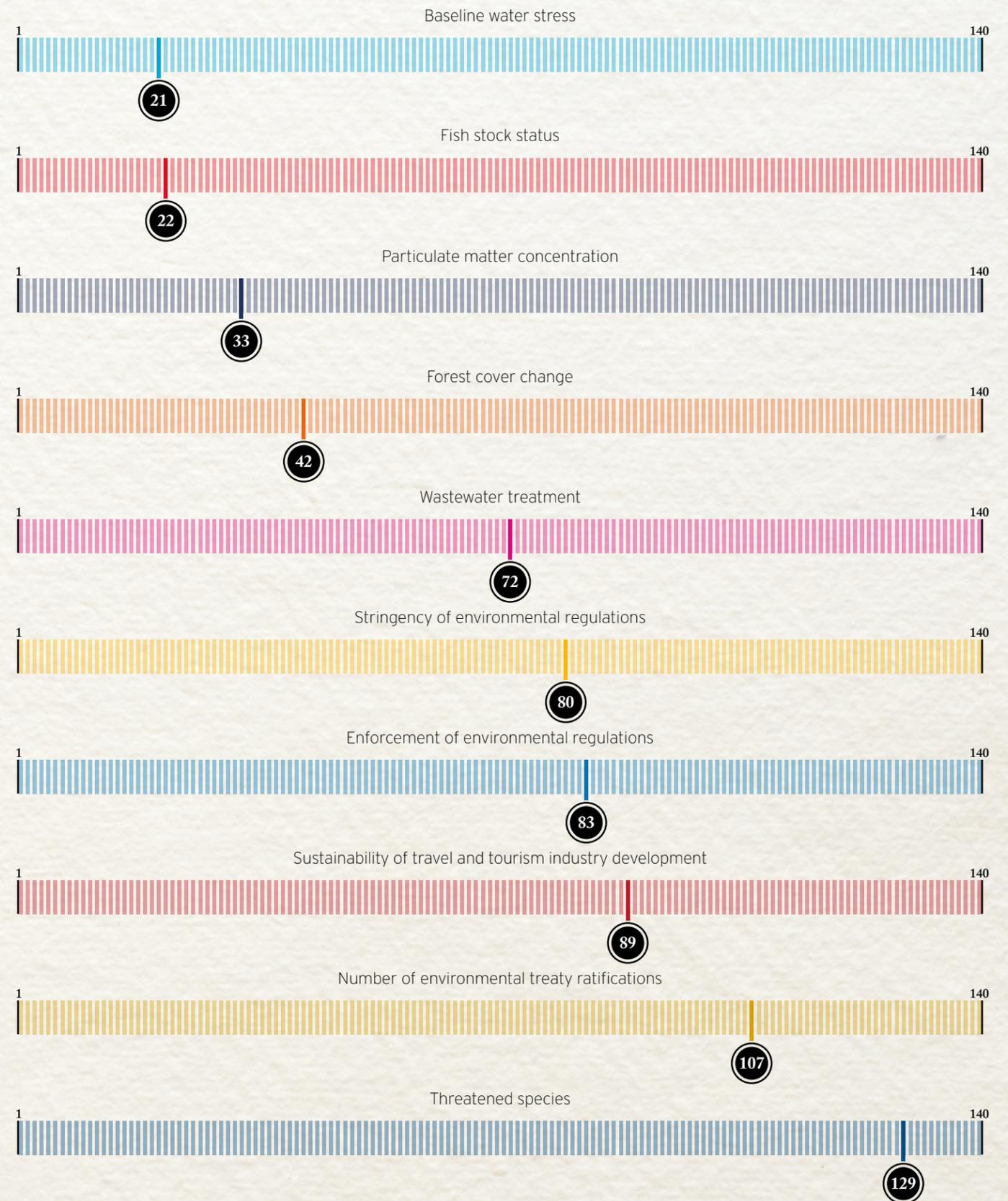
# The World Economic Forum Travel & Tourism Competitiveness Index 2019

*Colombia faces the challenge of designing development policies based on its natural capital, and formulating and implementing strategies to promote environmental sustainability as a competitive advantage for tourism. This is because:*

**Colombia is ranked 19<sup>th</sup> out of 140 countries on the natural resources pillar**



**However, it is ranked 52<sup>nd</sup> on the environmental sustainability pillar**





A sustainable future depends on responsibly managing non-renewable and limited supply resources. As a key user of these resources, tourism cannot ignore its responsibility in this regard. On the contrary, it must begin reflecting on the size of its environmental footprint and the impact that agents in its value chain have on the country's natural capital<sup>1</sup>. This is a fundamental challenge; At the moment, a good number of industry stakeholders do not believe that natural assets

are under their control, even when sustainable tourism depends on protecting these assets. Mitigating and fully managing tourism's environmental impact is essential to maintaining destinations' attractiveness, increasing the economic opportunities tourism offers to local communities, preserving the sociocultural integrity of host communities and guaranteeing the industry's overall sustainability.

Although tourism has experienced continuous growth in

recent years, public policy related to its environmental impact has not developed at the same rate. In addition, not enough strategies have been adopted to balance the industry's economic development goals with the need to protect the integrity of Colombia's natural capital. Although it is important to continue celebrating and promoting growth in the sector, it is equally important to include in the decision-making process risk factors that may negatively impact natural capital, affect

local communities' quality of life or threaten their cultural integrity, and reduce the industry's long-term profitability and economic benefits.

1. According to *The Natural Capital Coalition*, **natural capital** refers to the "stock of renewable and non-renewable resources (e.g. plants, animals, air, water, soils, minerals) that combine to yield a flow of benefits to people." The natural capital concept encompasses ecosystems, living organisms and different natural world values from which ecosystem services result..

## 1. Sustainable Tourism: A Development Engine



This policy aims to position tourism as a sustainable productive activity that promotes inclusive economic growth and is built on the joint responsibility in its value chain with regard to adopting responsible natural capital practices, efficiently using natural resources and comprehensively managing its environmental impact. To this end, the policy focusses on both supply and demand in the industry, and establishes a strategic plan to incorporate sustainability into: i) tourism governance, planning, management and decision-making strategies in destinations; ii) industry stakeholder business decisions and practices; and iii) traveler behavior and consumption habits. Each of these stakeholders must ensure that destinations are managed responsibly and that local communities' needs are met. They must also become strategic allies of these communities in the industry's transition to sustainable tourism.

## Environmental Scope of the Policy

As sustainability is a very broad concept, it was necessary to limit the policy's scope. Given that tourism is primarily an ecosystem service<sup>2</sup>, and that its sustain-

ability depends on the relationship between stakeholders in the value chain and the natural capital that makes tourism activities and services possible, this policy focuses on the environmental dimension of sustainability. In this regard the tourism sector faces a paradox: If it is properly managed, tourism contributes to conserving and protecting the country's natural capital, but if it is improperly managed it can have negative impacts on the environment. To prevent the latter from happening, the Sustainable Tourism Policy makes environmental sustainability the cornerstone of Colombia's tourism development strategies, programs and projects. Although the economic and sociocultural dimensions of sustainability are not explicitly addressed, their objectives are embedded within the policy. Environmentally sustainable tourism facilitates access to ecosystem benefits for regional stakeholders, and encourages the development of better cultural services<sup>3</sup> and processes. Sustainable tourism also results in a better managed economy that more efficiently uses resources and increases long-term benefits for the industry, such as: job creation; improved wellbeing for local communities; better preservation of heritage, culture, customs and traditions; and greater added value for Colombia.

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**2. Ecosystem services** refer to direct and indirect contributions of ecosystems to human wellbeing. According to The Millennium Ecosystem Assessment (2005), these are "the conditions and processes through which natural ecosystems, and the species that make them up, sustain and fulfill human life" and are applied in management and public policy decisions.

**3. Cultural services** are non-material values and benefits people obtain from ecosystems. They include lifestyles, cultural identity, recreation and aesthetic inspiration, among others.



Karen Lever  
Crab Cay, San Andrés y Providencia



Héctor Andrés Pinchao Pitacuar  
An undiscovered paradise, Tumaco, Nariño



*“Environmental sustainability is central to a country’s competitiveness. More efficiently using the natural resources needed for economic production improves productivity and lays the foundations for greater medium and long-term growth.”*  
*(Colombian Private Council on Competitiveness, 2019).*

The most colorful river in the world,  
Caño Cristales, la Macarena, Meta.



*Sustainable development is “that which leads to economic growth, to an improved quality of life and to social wellbeing, without depleting the renewable natural resources on which it is based, nor damaging the environment or the right future generations have to use it to meet their own needs.”*

*(Article 3, Law 99, 1993).*

1

### **Tourism Sector Plan 2018-2022 “Tourism: The Purpose that Unites Us”**

With the objective of improving Colombia’s competitiveness as a tourism destination, one of the Plan’s strategies is to “encourage more responsible and sustainable tourism.” It also highlights the need to create a joint responsibility scheme in which stakeholders in the value chain guarantee to protect the country’s natural capital.

2

### **Tourism Industry Growth and Employment Generation Pact**

In recognition of the strategic role of tourism within the domestic economy, and its potential for creating added value in the regions, this pact includes a commitment to define sustainable tourism guidelines.

3

### **Sustainability Pact “Producing Conservation and Conserving Productivity”**

This pact states the need to consolidate tourism as a sustainable and inclusive productive activity that contributes to improving the country’s competitiveness by incorporating conservation and the efficient use of resources into economic production, by protecting biodiversity, and by counteracting the degradation of Colombia’s ecosystems and strategic environmental areas.

## 2. Legislative Background



*The focus of the Sustainable Tourism Policy is compatible with that of the Green Growth Policy, that states: “although the country has a robust political and legislative framework to confront the challenges associated with sustainable development, it has not managed to efficiently integrate the environmental sustainability component with sectoral policies and economic growth strategies.” (DNP, 2019).*

The Sustainable Tourism Policy will also contribute to the commitments contained in the Convention on Biological Diversity and the Paris Climate Agreement, and is framed within the United Nations 2030 Agenda for Sustainable Development and the Sustainable Development Goals (SDGs). Specifically, it contributes to meeting the following SDGs in Colombia:



# Negative Externalities



 Molly Trerotola  
The highest palm tree in the world, Valle del Cocora, Quindío

The global growth of tourism has increased its environmental impact. In general, an inadequately planned and managed tourism industry, driven by a short-term market outlook, can generate a series of negative environmental externalities that are not properly incorporated into value chain stakeholder decision-making, and affect the sector's sustainability and the many communities that inhabit the regions. These include:



Increasing carbon emissions.



Intensive energy use and low use of renewable and non-conventional energy.



High levels of water consumption and baseline water stress.



A high volume of solid waste pollution.



Discharges of untreated wastewater.



Actions that threaten biodiversity and ecosystems.



*In general, it appears that the rate at which tourism extracts resources from ecosystems is greater than the rate at which ecosystems can replenish them. In addition, the rate at which the industry generates waste, wastewater and pollution is greater than the rate at which ecosystems can process them, regenerate themselves and maintain their integrity.*



### Climate Change

- On a global scale, **tourism contributes between 5% and 8% to climate change.** Within this figure, 40% of emissions come from air transport, 32% from ground transport and 21% from accommodation services. The remaining 7% is attributed to other tourism activities and other forms of transport, such as cruises and trains.
- Although tourism's contribution to climate change is lower than other sectors, such as electricity (25%), agriculture (24%) or industry (21%), **it is estimated that by 2035, tourism's carbon footprint will more than double, and that if we do not move towards decarbonization and energy efficiency, by 2030, 21% of global carbon emissions will be caused by tourist transport.**

- Colombia **is among the 40 countries generating the most greenhouse gases (GHG)** worldwide and is fifth among the 32 countries of Latin America and the Caribbean.
- It is forecasted that by 2040, Colombia's average annual temperature will have increased by close to 0.9°C.** This represents a risk to tourism infrastructure (particularly in coastal destinations), biodiversity, ecosystems and the availability of essential natural resources.



### Energy Efficiency

- Tourists consume **25% more energy, on average, than residents.**
- Worldwide, **hotels are ranked fifth in energy consumption** within the commercial buildings and services sector.

- It is estimated that by 2050, energy consumption in the sector will be 2.64 times higher than it was in 2010, **an increase of 164%.**



### Water Management

- Tourism accounts for around **5% of the world's total water consumption.**
- Tourists consume up to **four times more water than residents.**
- In San Andres, a tourist's daily water consumption is **twice than that of a resident**, and only 29% of tourists are aware that this is one of the country's most vulnerable destinations; It is an island with limited fresh water sources.
- It is forecast that by 2050, the use of drinking water in the tourism industry **will have increased by 92% compared to 2010.**



### Solid Waste Management

- Globally, it is estimated that **tourists produce 35 million tons of solid waste** each year. This is equal to felling 595 million trees.
- Coastal areas host 80% of global tourism**, and around 8 million tons of single-use plastics are generated per year that, due to poor waste management, cause the death of over 1 million marine species.
- The volume of plastic waste that ends up in marine ecosystems **increases by 40% during high season.**
- It is estimated that by **2050** oceans will contain **more plastic than fish.**
- Between **12% and 30% of food is wasted** by hotels globally.



### Wastewater Treatment

- Only **5% of the world's wastewater** is treated.
- In **Colombia, 42.2% of wastewater is treated**, with the remainder being discharged untreated into the environment.



### Protecting Biodiversity and Ecosystems

- Of the 48,000 species of plants and animals **included in the global Red List of Threatened Species, 1,761 are at risk due to tourism developments.**
- Colombia's Marine and Coastal Research Institute (INVEMAR) has determined that water pollution by industry **is one of the country's five main causes of biodiversity and ecosystem service losses.**

*If the sustainability dynamic of tourism does not change in coming years, the growth in the sector will result in greater negative externalities and its environmental impact will triple by 2050.*



Eduardo Angarita Muñoz  
Mountain paths, Laguna del Otún, PNN Nevados, Risaralda



### 3. New Paradigms for Sustainable Tourism

#### **Sustainable Tourism: A Shared Responsibility**

Building a sustainable tourism sector is a challenge that is too large for one stakeholder or one organization to tackle on their own. To address this challenge, changes (sometimes structural) need to be made across the entire industry value chain. Above all, there needs to be a joint commitment from national government, regional authorities, businesses, local

communities, travelers, and other stakeholders in the value chain, to develop and implement transformative solutions that effectively contribute to the sustainable growth of tourism. The Sustainable Tourism Policy aims to start this conversation in Colombia. By promoting sustainable tourism products and services it will ensure joint responsibility for sustainably developing and managing tourism destinations; mitigating, controlling and offsetting the negative externalities linked to tourism; and adapting

the industry's response to a market that is becoming more sensitive towards local communities and biodiversity.

#### **Opportunities for Sustainable Tourism Development**

Recent changes in consumer preferences represent incredible opportunities for sustainable tourism. Tourists are manifesting increased solidarity

with local communities and industry stakeholders, as well as a greater level of consciousness with regard to the values of the businesses they give their money to, and the potential environmental impact of the activities they participate in during their travels. As a result, a significant number of travelers now understand that their decisions have the potential to transform the industry and they are willing to choose more sustainable tourism products and options, even if these come at a higher cost.

## Sustainable Tourism: An Industry-wide Principle

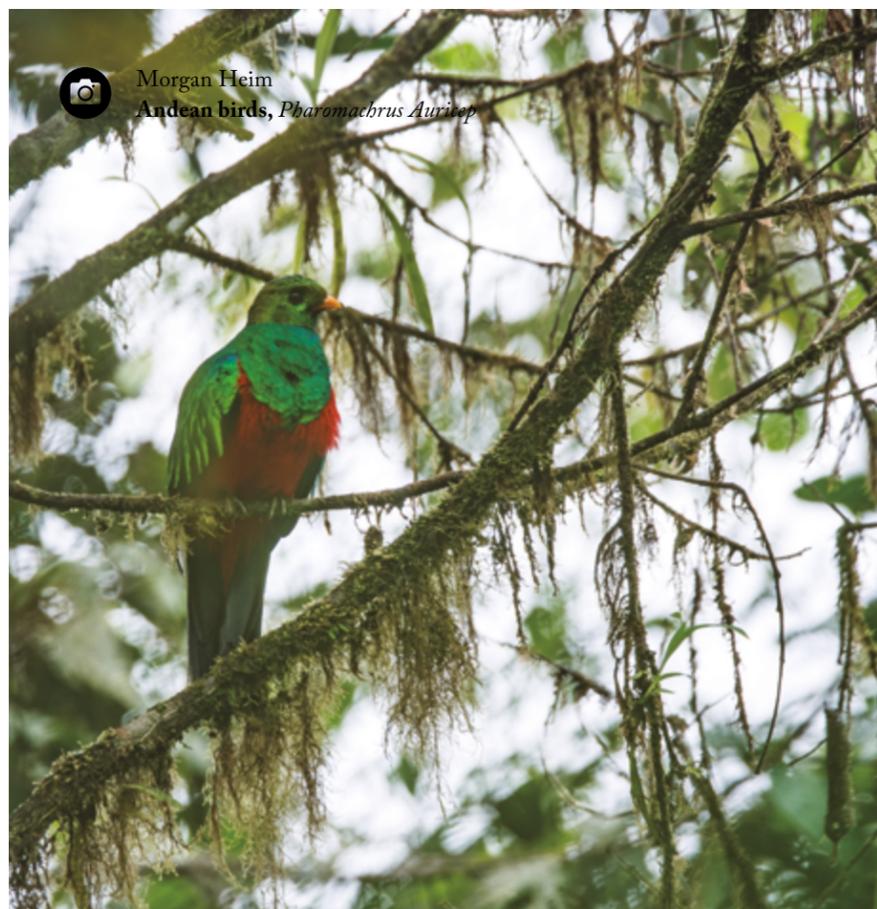
This policy aims to break away from the paradigm that sustainable tourism is only eco-tourism or community-based tourism – which are just two of many forms of tourism –, and that it is limited to nature destinations, coastal areas, protected areas and natural parks, or to certain types of products or activities. Rather, it states that sustainability is a much broader concept that is applicable to all types of tourism, all types of destinations (rural, urban, land and sea), and all stakeholders in the value chain. Sustainability is a principle that must be applied to all industry segments, and all activities, products and services must encompass a vision of environmental responsibility that underpins its value and guarantees its long-term development.

## Sustainability as a Factor of Competitiveness

The implementation of sustainable tourism practices results both in environmental benefits – such as reduced natural resource use and extraction, and decreased pollution – and in a greater contribution to economic growth. The Sustainable Tourism Policy is based on this principle,

and argues that protecting natural capital is essential not only to ensuring Colombia's environmental and ecological integrity, but also to guaranteeing tourists a high-quality experience and increasing the competitiveness of tourism businesses and destinations. From a business perspective, this policy incentivizes businesses to view sustainability as a competitive advantage that contributes to achieving a more comprehensive business vision, improves operational efficiency, reduces the cost of basic services, increases local job creation, attracts foreign investment, enhances customer loyalty and

achieves a greater brand value. From a destination perspective, this policy argues that it is fundamental for local governments to align tourism planning and management with sustainability criteria in order to ensure the long-term preservation of resources in their regions, strengthen supply chains, improve working conditions and ensure tourism's longevity. If businesses and governments do not start investing in the environmental assets that add value to tourism products and activities, they will start to see a reduction in profit per tourist, even if they see an increase in the total number of visitors.

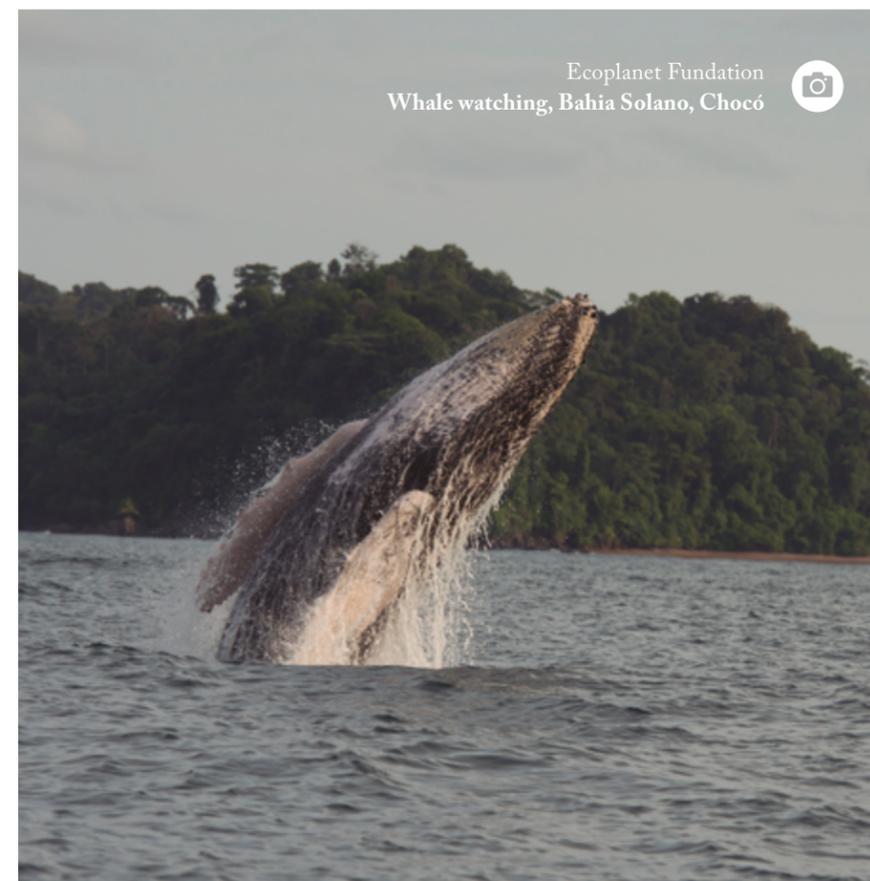


## Sustainability as a Factor of Local Social and Cultural Development

The Sustainable Tourism Policy views improved sustainability and competitiveness as a positive factor in optimizing working conditions in the regions, strengthening supply chains, dynamizing the economy and guaranteeing local community wellbeing. From this perspective, it also regards sustainable tourism as a key factor for regional and local community social development in areas where tourism takes place; It strengthens social fabric, reduces social inequality and ensures the fair distribution of benefits derived from tourism. Given that in many regions of the country, ecosystems and communities not only coexist, but are also closely interdependent, the benefits of sustainable tourism transcend the environment and can also be seen in people, their culture and productive projects.



*“Sustainable tourism development guidelines and management practices are applicable to all forms of tourism in all types of destinations, including mass tourism and the various niche tourism segments.” (UNWTO).*



## Sustainable Tourism Added Value

The Sustainable Tourism Policy states that implementing sustainable tourism criteria will not only contribute to mitigate, correct and offset the sector's negative externalities -highlighting the net economic benefit of tourism - but will also positively impact destinations by allowing income to permeate into local communities. Although tourism is already a source of income for more than 600,000 Colombians, this num-

ber could increase significantly in the long-term if the sector's growth is accompanied by the adoption of responsible practices that encourage more sustainable land use, promote the conservation of the country's strategic ecosystems, avoid over-extracting resources and prevent environmental degradation. This is reinforced by the fact that, especially in vulnerable destinations, tourism has the capacity to offer communities an alternative source of revenue to mining, logging and cattle-farming, all of which are polluting activities that

significantly contribute to climate change. These alternative livelihoods may also benefit tourism's wider supply chain, including small and medium sized handcraft entrepreneurs, local transport operators, fishing communities and farmers in the regions. Since the benefits of tourism tend to spread across regions, the industry may ultimately contribute to increasing levels of environmental awareness, addressing the planet's life system crisis, and transitioning the country towards more collaborative, resilient and sustainable economies.



## 4. Sustainable Tourism Development Objectives

### General Objective

To strengthen sustainability in Colombia's tourism value chain, in order to improve its competitiveness, guarantee the preservation and responsible use of natural capital and generate greater added value and differentiation for the country.

### Specific Objectives

-  Increase the amount and relevance of **information** that contributes to sustainable tourism decision-making.
-  Strengthen the incorporation of environmental sustainability criteria into **tourism planning and management**, and the coordination between the sector and environmental authorities.
-  Strengthen the **conditions and incentives** for innovation and the use of natural capital in tourism's added value proposition.
-  Incentivize businesses and other stakeholders in the value chain to **mitigate, control and offset** their negative environmental impact.
-  Promote **responsible behavior and consumption** among travelers.
-  Strengthen Colombia's **position** in sustainable tourism strategic markets.

### Target Audiences

Considering that one of the key principles of this policy is the shared responsibility for sustainable tourism development in Colombia, it proposes the following specific objectives for each stakeholder:

-  **Local government and institutions.** Increase information availability and governance regarding land use, planning, regulation and interinstitutional coordination for the sustainable development and management of tourism destinations.
-  **Entrepreneurs and businesses.** Incentivize businesses and suppliers to adopt best practice in responsible planning, operation, production and consumption regarding their tourism services, activities and products, and ensure that they contribute to comprehensive and sustainable tourism management.
-  **Travelers and consumers.** Promote responsible behavior and the sustainable consumption of tourism products, services and activities by travelers, and contribute to positioning Colombia as a world-class sustainable tourism destination.
-  **Local communities and residents.** Stimulate communities to take ownership of their natural capital so that they become strategic allies and guarantors of the industry's transition towards greater sustainability, and enjoy the socioeconomic benefits of tourism.



## Sustainable Tourism Roadmap

Based on the issues identified and the specific objectives presented in relation to the sustainability of the Colombian tourism industry, the Sustainable Tourism Policy proposes six strategies, from which a 'Sustainable Tourism Roadmap' is developed. These strategies will be implemented via 14 programs, 32 projects and 140 policy actions, all of which have execution timelines. The timelines are highlighted in color in the tables below: Green indicates a 2-year timeline, yellow between 2 and 6 years, and red from 6 to 10 years. The policy has a time horizon of 2030, which is consistent with the Agenda for Sustainable Development that was signed and ratified by the country.

### What is the Problem?

The main problem identified by this policy is the low level of sustainability in Colombian tourism activities and services. This affects natural capital integrity, local community living conditions, new and existing tourism business productivity, destinations competitiveness and sophistication of demand in the industry. It also generates low levels of joint responsibility for sustainability in the industry and results in tourism not being sufficiently used to gain regional competitive advantages.

\* In the Sustainable Tourism Policy strategic plan document readers can find all aspects related to the roadmap, including potential public and private stakeholders for each of the actions and compliance indicators, with their respective goals.

## 5. Strategic Plan: A Vision for Sustainably Transforming Tourism





### What Problem does it Solve?

The lack of reliable information to inform sustainable tourism decision-making.

### What are its Causes?

-  Weak indicators and information systems measuring national and regional environmental performance in tourism.
-  Limited interaction between existing sources of tourism and environmental information.
-  Poor implementation of fourth industrial revolution technologies to evaluate and manage the environmental performance of tourism.
-  A lack of institutional tools that measure resident and tourist satisfaction.

## Strategy 1. Strengthening Information for Sustainable Tourism

This strategy will promote the continuous generation of information, improve its availability for governments, destinations and tourism businesses, and guarantee its reliability for evidence-based decision-making and public-private partnerships for sustainable tourism development.

### Why is this Important?

**The capacity of governments to develop sustainable tourism depends on the type of data and information they collect on tourism as an economic activity, and natural capital as a strategic asset of destinations.**

1. **There is a significant lack of information for sustainable tourism policy, investment and decision-making in Colombia.** Aside from the protected area system, there are no indicators nor baselines to measure the impact of tourism growth on natural capital, nor to inform environmental impact mitigation, control and offsetting processes.
2. **The country does not have an estimate of the industry's environmental footprint,** nor tools for its continuous monitoring, nor specific sectoral studies on tourism's environmental performance.
3. **The main indicators used to measure growth in the industry are based on the number of visitors,** and neglect vital aspects such as the quality of visits, the net socio-economic benefits of tourism, its impact in terms of job creation, and its contribution to social development and the conservation of the natural assets that form the basis of the industry's competitiveness.
4. **The indicators often result in sectoral goals that favor mass tourism,** rather than goals that favor quality tourism that attracts higher foreign investment and is of greater benefit to local communities.
5. **The industry's different agencies and economic sectors manage** highly heterogeneous and isolated data.
6. **There are too few intersectoral and interdisciplinary spaces for dialogue, interaction, forecasting and information analysis** to tackle sustainable tourism problems.
7. **Fourth industrial revolution technologies are not being properly utilized by the tourism industry to process** complex data related to the sustainability of destinations and stakeholders in the value chain, implement supply management strategies, pinpoint demand preferences, identify ecosystem service models, and better understand the relationship between the country's natural capital and tourism.
8. **To date, no official efforts have been made to measure residents' perception of the quality of environmental and tourism resources,** nor to identify their attitudes towards tourism. These metrics are vital components of the industry's decision-making process.

## Roadmap for Strengthening Information for Sustainable Tourism



### Program 1. Information System for Measuring Tourism's Environmental Performance.

This program consists of developing and implementing an information system to measure the environmental impact of stakeholders and activities in the tourism value chain at a national and regional level, with a view to managing impact and sustainably developing activities.

The system must comply with international standards and must be linked with the DANE accounts, the Colombian Environmental Information System (SIAC) and the Biodiversity Information System (SiB). It must also include measuring tools, indicators, statistical methodologies, research and formal studies that serve as the basis for defining strategies to improve environmental performance in tourism. The following projects are part of this program:

- 1. Sustainable tourism indicators.** This project has three main objectives. The first is to adjust the performance indicators and goals used to measure the tourism sector's development and growth, take them beyond just the number of visitors to the country, and focus on aspects favoring quality tourism. This will bring in more foreign investment and provide greater benefits to local communities. The second objective of this project is to design and implement new sustainable tourism indicators that measure the impact of tourism on the natural environment and generate reliable, standardized and pertinent information on environmental performance in the industry, at a national and regional level. Lastly, this project will publish the information in a 'Tourism Viewfinder' (Visor de Turismo) – developed in conjunction with the National Statistics Office (DANE) – and make it available to all stakeholders in the Colombian tourism value chain.

- 2. Research and Institutional Studies on Sustainable Tourism.** This project will fill the gaps in current research and sectoral studies on the environmental impact of stakeholders in the Colombian tourism industry value chain. It will define a baseline for strategies to improve stakeholders' environ-

mental performance, and generate information on people's satisfaction with tourism development and its environmental impact in their regions, as well as on tourists' perception of sustainability within the Colombian tourism industry.



### Program 2. Sustainable InfoTur 4.0.

In line with the growing digitalization of productive sectors, this program will leverage fourth industrial revolution technologies to undertake complex information analyses and facilitate the creation of sustainable development strategies for attractions and destinations. It will also generate specialized knowledge on sustainable tourism by creating collaboration spaces for public agencies, academic institutions, the private sector and social organizations. This will produce innovative proposals to transform the Colombian tourism industry. The program will be implemented through two projects:

- 1. Sustainable Tourism Think-Tank.** This project will create a Sustainable Tourism Think-Tank where the public and private sectors, academic institutions, civil society organizations, local entrepreneurs and innovators and local communities with an interest and stake in the sector can come together for interdisciplinary and intersectoral debate. New technologies will be used for data analysis, and information will be shared and generated collaboratively. Its key objective is to take a long-term view towards developing innovative proposals to use tourism as a tool for conser-

vation and to comprehensively and sustainably manage tourism's environmental impact. The Sustainable Tourism Think-Tank will also be a space for university students to carry out their research degree projects, and in which public interest documents and scientific publications will be created to contribute to Colombia's recognition as a world-class sustainable tourism destination.

- 2. Smart Sustainable Tourism.** This project will leverage fourth industrial revolution technologies to process complex data, and optimize the resources available

for monitoring and evaluating tourism's environmental performance. The project will use artificial intelligence to identify ecosystem service models that illustrate the relationship between tourism and the environment, and help national and local government to strategically develop destinations, implement supply and demand management strategies, and prioritize actions related to the greening of the industry.



José Yeiner Giraldo Loaiza  
Back to town,  
Aguadas, Caldas



| Program  | Project  | Indicative Actions   | Deadline  |
|--|--|--|---|
| Information System for Measuring Tourism's Environmental Performance | Sustainable Tourism Indicators   | Review, adjust and complement the indicators used to measure tourism growth in Colombia, and the national government goals for the sector, and combine them with environmental performance indicators that support the country's objective of becoming a sustainable tourism destination.  |    |
|  |  | Design and implement new indicators that measure tourism's impact on the environment and provide reliable and pertinent information related to environmental performance in the industry at a national, regional, urban and rural level.   |    |
|  |  | Strengthen the DANE Environmental Survey of Hotels, update its indicators, resume its application and broaden its scope to include other tourism sub-sectors.  |    |
|  |  | Create a sustainability module for the DANE Tourism Viewfinder ( <i>Visor de Turismo</i> ) in which indicators can be viewed within Colombian tourism statistics and accessed interactively.   |    |
|  | Research and Institutional Studies on Sustainable Tourism  | Integrate the environmental satellite account research and survey results into the tourism satellite account in order to identify tourism's environmental performance through state, pressure and response indicators that currently measure environmental conservation and protection objectives.   |    |
|  |  | Align the industry's environmental performance indicators with the UNWTO Statistical Framework for Measuring the Sustainability of Tourism, to ensure that the information is comparable, pertinent and homogenous with globally produced information. Use this statistical framework to establish competences for national organizations that measure sustainable tourism indicators. |  |
|  |  | Develop and implement interrelation and interoperation procedures between the statistical sources of tourism information, the Colombian Environmental Information System (SIAC) and the Biodiversity Information System (SiB), in order to effectively measure the conservation and sustainable use of biodiversity and ecosystem services by the tourism industry.                    |  |
| Research and Institutional Studies on Sustainable Tourism            | Develop a diagnostic study of the Colombian tourism industry's environmental footprint that establishes a baseline for: i) GHG emissions; ii) water consumption; iii) energy consumption; iv) solid waste generation; v) wastewater treatment; and vi) deterioration of biodiversity and ecosystem services. The data must be analyzed by subsector or type of tourism service provider, and will serve to set goals for mitigating, controlling and offsetting the sector's environmental impact, and strategies to achieve them. |   |   |
|  | Include self-assessment indicators for business sustainability practices in the National Tourism Register (RNT) renewal survey that all tourism service suppliers must complete.   |   |   |

| Program  | Project   | Indicative Actions   | Deadline  |
|--|---|--|---|
| Information System for Measuring Tourism's Environmental Performance | Research and Institutional Studies on Sustainable Tourism | Create a repository for the results of carrying capacity and limits of acceptable change studies for attractions and tourist destinations, and differentiate between those that have special environmental and cultural values and ecological vulnerabilities. These studies will be made available to interested parties and administrators of tourist attractions that want to replicate them. |    |
|  |   | Include in the evaluation section of the Vice-Ministry's tourism quality certification compliance indicators related to minimum quality standards for destinations and tourism service providers.  |    |
|  |   | Conduct periodic visitor satisfaction surveys in prioritized municipalities via Tourist Information Centers, digital platforms, apps or smart tourism tools.   |    |
|  |   | Implement periodic research and monitoring of local communities' perception with tourism and its environmental impact on their regions.  |    |
| Sustainable Tourism Think-Tank                                       | Sustainable Tourism Think-Tank                            | Develop research areas to generate knowledge and specialized information to inform sustainable tourism development, based on interdisciplinary and intersectoral tools and analyses, and on the implementation of new technologies.  |    |
|  |   | Support the development of sustainable tourism research projects in Colombia, to be carried out by industry stakeholders and interested parties, within science, technology and innovation frameworks.   |  |
| Sustainable InfoTur 4.0  | Smart Sustainable Tourism                                 | Implement tools and platforms that are based on natural capital accounting analyses to determine, quantify and value tourism goods and services in the country, and inform investment decisions in tourism projects with the greatest environmental, social and economic benefits (e.g. the IDB Integrated Economic-Environmental Modeling Platform (IEEM)).                                     |  |
|  |   | Use big data and artificial intelligence to analyze and interpret complex data, and make informed investment and public policy decisions on sustainable tourism.   |  |
| Sustainable InfoTur 4.0  | Smart Sustainable Tourism                                 | Develop pilot projects in destinations (e.g. smart destinations) using 4.0 technologies to capture, process, manage and present sustainable tourism information and contribute to tourism management and stakeholder decision-making.  |  |



## What Problem does it Solve?

Poor incorporation of environmental criteria in tourism planning and management, and low levels of coordination between the tourism sector and environmental authorities.

## What are its Causes?

-  Poor incorporation of tourism in land-use planning.
-  Failure to incorporate natural capital issues, the supply of environmental goods and services and the availability of public services into regional tourism development plans.
-  Absence and/or deficient application of carrying capacity and limits of acceptable change methodologies in attractions and destinations.
-  Lack of clarity on competences and weak implementation of environmental legislation regarding sustainable tourism planning and management at attractions and destinations.
-  Lack of sustainable tourism management models for destinations and attractions.
-  Poor consideration of environmental risks and the effects of climate change in tourism planning and management.
-  Insufficient attention given to sustainable tourism by existing national coordination committees and within other national sustainability strategies.

## Strategy 2. Building a Strong Governance Framework for Sustainable Tourism

This strategy will strengthen the incorporation of sustainability criteria into destinations' land-use, planning and management processes, and generate partnerships that favor coordination between tourism institutions and the environmental authorities that manage sustainable tourism development.

## Why is it Important?

**Sustainable tourism development requires coordinated government action to ensure that tourism planning and management processes at the regional level incorporate the availability of natural resources, compatible land uses, public service coverage, and infrastructure investment needs so that destinations and communities can sustainably manage growth.**

1. Results from a March 2020 survey conducted by the Vice-Ministry of Tourism show that 22.2% of the 1,597 surveyed tourism service providers **believe their local government gives little importance to sustainability**, and that 50.7% consider it gives it medium importance.
2. The 2019 Colombian Regional Tourism Competitiveness Index (ICTRC) gives environmental criteria an average score of 4.8/10 in the 30 departments surveyed, thus **suggesting that environmental criteria do not significantly contribute to tourism competitiveness in any department in the country**. Compared to the 2018 ICTRC survey, environmental criteria results decreased in 20 departments (64.5% of those surveyed) and only increased in 5.
3. **Only 168 Colombian municipalities have a tourism development plan**. This equates to 15% of the country and represents 59% of the municipalities included in the Tourism Destination Management strategy. In other words, 40% of municipalities with tourism potential have yet to implement structured planning processes that guarantee community wellbeing, dynamize the regional economy and protect the natural environment.
4. **The poor incorporation of tourism into land-use plans has resulted in declining competitiveness** at attractions such as tourist beaches, and disorganized, informal and unsustainable tourism development at emerging destinations.
5. **Local tourism development plans do not sufficiently incorporate environmental criteria**, do not take public service coverage into consideration, or are based on the region's supply of environmental goods and services<sup>4</sup>. A consequence of this is that at some tourist destinations, water, sewage, electricity and solid waste collection services end up covering the tourism sector rather than the local community.
6. **There is a lack of coordination between tourism institutions and environmental authorities** that creates a barrier to governance and effectively developing a sustainable tourism agenda. Collaboration between these two parties is limited to specific projects - mainly related to nature and nautical tourism - or to projects with a limited scope to certain attractions, such as protected areas or beaches. A broader coordination is required to sustainably plan and manage all types of rural and urban tourism.
7. Although the importance of establishing and applying models of carrying capacity and limits of acceptable change to preserve destinations' natural capital has been widely recognized, there are still significant barriers to their effective implementation in the country. **To date, few studies of this type have been conducted versus the number tourist attractions in the country.**
8. Although a number of Colombian destinations are seasonally dependent due to climate or environmental issues, **not enough innovative mechanisms have been implemented to sustainably manage regional seasonal demand.**
9. **In general, industry stakeholders have not developed enough environmental risk management strategies** and the supply of products and services has not been adapted to the consequences of climate change. This is in spite of the fact that these consequences are particularly serious for ecotourism, adventure tourism and sun & beach tourism, all of which strongly depend on climate conditions, landscape and ecosystem integrity, as well as on the state of regional ecosystem services.

<sup>4</sup> **Environmental services** refer to the flow of materials, energy and information that people obtain from natural capital. They also refer to the supply of environmental resources and sanitation, which includes water and sewage systems and waste management.

## Roadmap for Building a Strong Governance Framework for Sustainable Tourism



### Program 3. Sustainable Destination Management.

This program will improve knowledge, resources and competences related to destination management by regional organizations, and reinforce national coordination and intervention mechanisms. It is made up of five projects:

**1. Legal Tools for Sustainable Tourism Development.** This project will strengthen the sustainable tourism legal framework, and develop and manage legal tools that allow the competent authorities to apply the methodologies they deem relevant to determine tourism capacity at attractions and destinations and develop improved visitor management processes. It will also define criteria, requirements and special conditions for sustainable regional development, that focus on comprehensive tourism impact management.

- 2. Technical Tools for Sustainable Tourism Planning and Management.** This project will provide local authorities with technical tools that strengthen their specialized knowledge of sustainable tourism, and allow them to improve regional land-use, planning, management, and public-private coordination processes.
- 3. Technical Assistance for Destinations Sustainability.** This project adapts and strengthens technical assistance for regional sustainable tourism management. It focuses on supporting the definition, execution and monitoring of regional sustainability agendas. The project will also support regional organizations in implementing, evaluating and validating carrying capacity and limits of acceptable change studies.

**4. Deseasonalizing Tourism for Sustainability.** This project will mitigate strong seasonal variations in Colombian tourism by driving changes in supply, demand behavior and preferences, and stimulating new flows of tourism. At a local level, this project will support destinations where seasonal demand is highly dependent on environmental factors, and natural attractions with the highest levels of vulnerability. It will encourage them to diversify the products on offer, and implement demand management models to reduce the tourism variability dynamic and help them preserve regional ecological values.

### Colombia, a Blue Destination.

This project will increase tourism's contribution to protecting marine and land biodiversity in coastal and insular areas, in line with conservation and sustainability objectives for oceans, seas and marine resources. The project will strengthen sustainable tourism in strategic marine and coastal ecosystems by raising awareness among travelers, certifying tourist beaches and developing blue tourism<sup>5</sup> pilot projects, among other initiatives.

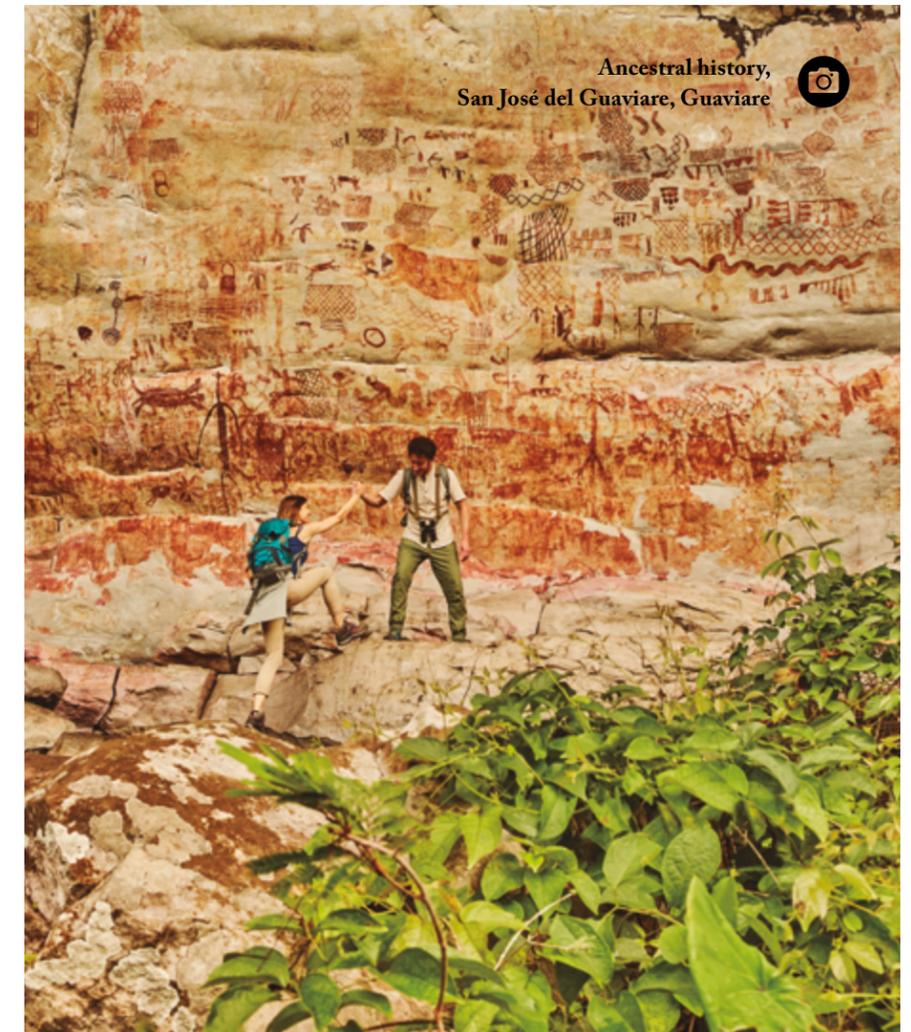
**5. Blue tourism** is linked to nature tourism. It focuses on activities, products, services and experiences in biodiverse marine spaces. It is considered a vital part of the blue economy, which recognizes the importance of seas and oceans as drivers of the economy with great potential for innovation and growth.



### Program 4. Resilient and Adaptable Tourism Destinations

This program incorporates environmental risk considerations and the consequences of climate change into destination planning and management. The intention is to improve the tourism industry's ability to resist and adapt to the inevitable changes in ecosystems, or to restrictions imposed by natural phenomena or issues such as COVID-19. This program will be executed through the following project:

**1. Sustainable Tourism Risk Management.** This project consists of designing and implementing technical tools that incorporate environmental criteria



into the tourism Risk Management System. It will also develop climate change adaptation strategies that are specific to the industry. It is important to understand adaptation needs in terms of the products that are specific to different types of tourism, and the tourism activities that take place in Colombia's vulnerable ecosystems. This will mitigate potential damage, create tools to manage consequences, and turn risk into opportunity.



### Program 5. 2030 Pact for Sustainable Tourism

In line with SDG 17, on establishing partnerships to achieve goals, the Sustainable Tourism Policy will create national partnerships to define commitments for integration, public-private inter-institutional coordination, and stakeholder and interested party involvement in the tourism industry. This will facilitate governance of sustainable tourism development in Colombia. The program will also develop sector-based agendas that raise awareness of the sustainability challenges facing tourism at a national level, and develop fruitful international partnerships that increase the scope of initiatives and contribute to successfully implementing this policy. This program will be executed through three projects:

- 1. Cross-ministerial Sustainable Tourism Agendas.** This project will coordinate the activities of national organizations with an interest in sustainable tourism that execute actions within this policy. It will recognize tourism as a vital industry for achieving national sustainability goals and fulfilling Colombia's SDGs.
- 2. Sub-sector Sustainable Tourism Agendas.** Specific

cross-sectional or provider-specific agendas will be created to address the unique sustainability challenges facing tourism businesses, and identify progress, contribution and achievement. These agendas must become action plans that ensure business involvement in policy execution and collaboration to tackle barriers on the road to sustainable tourism. This may include voluntary environmental impact offset schemes, carbon calculators, investing in alternative sources of energy, modernizing fleets or tourism infrastructure to reduce environmental impact, and the need

to encourage less energy intensive means of transport, etc.

- 3. International Cooperation and Partnerships for Sustainable Tourism.** This project will dynamize cooperation and strengthen Colombia's participation in international committees, agencies or organizations, and encourage subscription to partnerships, initiatives or coalitions that support the development of sustainable tourism.



 Carlos Mario Parra Ríos  
San Pedro de las Lajas, Leticia, Amazonas

| Program                            | Project   | Indicative Actions  | Deadline  |
|------------------------------------|---|---|---|
| Sustainable Destination Management | Legal Tools for Sustainable Tourism Development                 | Present a proposal to amend the tourism industry's legislative framework and incorporate sustainable development criteria and conditions.   |    |
|                                    |   | Present a regulatory reform proposal allowing competent authorities to apply carrying capacity and limits of acceptable change models, and determine the tourism limits of attractions. This will ensure that tourism develops within conservation criteria.  |    |
|                                    |   | Develop an administrative proposal to adopt basic technical criteria for: i) limits of acceptable change studies, ii) visitor planning and management processes, and iii) monitoring, evaluating and validating the indicators defined by competent local authorities. These guidelines may be applied by tourist attraction administrators and authorities choosing to implement the limits of acceptable change model to determine the capacity of tourist attractions.   |    |
|                                    | Technical Tools for Sustainable Tourism Planning and Management | Update the Technical Assistance Guide for Tourism Planning and the Tourism Industry Toolbox to offer technical guidance to local authorities on incorporating the following components into their tourism development plans: i) the supply of environmental goods and services, availability of public services (water & sewage systems and electricity), basic sanitation guidelines and other key aspects for meeting tourist demand without negatively impacting the environment or local communities; and ii) the need to manage demand at established natural destinations (e.g. encourage lower tourist flows throughout the year, distribute demand across attractions and sites of interest, regulate supply, and limit access and activities). |   |
|                                    |   | Design environmental liability management <sup>6</sup> processes for tourism in accordance with each destination's strategic ecosystems and natural characteristics. These will be incorporated into existing regional management coordination frameworks (Colombian Ocean Commission, Ecotourism Table, Cormagdalena, etc.)  |  |
|                                    |   | Develop and publish step-by-step guides for regional sustainable tourism development, environmental regulatory frameworks, and legislation applicable to developing tourism activities in protected areas.  |  |

**6. Environmental liability management** consists of implementing coordinated actions with regional authorities to strengthen, recover or regenerate ecosystems, landscapes, biodiversity components or natural resources impacted by tourism activities.

-  Long
-  Medium
-  Short

| Program                            | Project   | Indicative Actions  | Deadline   |  |
|------------------------------------|---|---|--|--|
| Sustainable Destination Management | Technical Tools for Sustainable Tourism Planning and Management | Publish a manual on local and national authorities' tourism management competences in different tourist areas (e.g. protected areas, coastal areas, urban areas, etc.). Working groups will be set up with environmental authorities to establish institutional competences and facilitate coordination for tourism planning. |  |  |
|                                    |   | Develop and publish technical guidelines for tourist attraction administrators on voluntary carbon footprint offset schemes for visitors and tourism service providers.   |  |  |
|                                    |   | Develop public awareness actions for local communities and residents on the importance of sustainable tourism to preserving natural capital and improving their quality of life.  |  |  |
|                                    |   | Generate spaces for dialogue with ethnic communities and indigenous groups, that result in strategies to improve sustainability in the regions under their jurisdiction.  |  |  |
|                                    | Technical Assistance Destinations Sustainability                | Develop technical assistance services for regional organizations and other stakeholders to determine the capacity of the tourist attractions by applying carrying capacity and/or limits of acceptable change methodologies, and implement visitor management processes based on these methodologies.                         |  |  |
|                                    |   | Establish and monitor local sustainable tourism agendas for environmentally vulnerable and prioritized destinations.  |  |  |
|                                    |   | Design and execute methodologies that improve regional organizations' ability to interpret and use data in decision-making processes related to tourism planning and management.  |  |  |
|                                    |   | Offer technical assistance for designing, formulating and implementing tourism excellence plans in accordance with Act 2785, 2006.  |  |  |
|                                    |   | Deseasonalizing Tourism for Sustainability  | Develop and implement mechanisms to sustainably promote destinations, and modify the focus of campaigns to diversify demand, attract low-season visitors, promote less busy attractions, encourage long stays and stimulate new tourism routes in partnership with the private sector. |  |
|                                    |   |   | Develop 'rest' guidelines for tourist destinations and attractions with special environmental value or that are part of strategic ecosystems.  |  |
|                                    |   | Develop and publish technical guidelines for diversifying tourism products and experiences in destinations with high seasonality dependent on environmental factors.  |  |  |

| Program                                      | Project                                    | Indicative Actions  | Deadline |
|--|--|---|----------|
| Sustainable Destination Management           | Deseasonalizing Tourism for Sustainability | Develop and implement tourism demand actions to manage seasonality at attractions and destinations, and avoid saturation, mass tourism and pressure that represents risk for the environment, natural resources and tourism infrastructure.   |          |
|  |  | Develop and implement technical support for coastal municipalities to obtain sustainable beach management certifications, such as Blue Flag.  |          |
|  | Colombia, a Blue Destination               | Develop and structure circular economy pilot projects in coastal tourism destinations, in line with the National Circular Economy Strategy and the Regional Coalition on Circular Economy for Latin America and the Caribbean.  |          |
|  |  | Raise awareness on the responsible use of water resources by visitors and communities through blue tourism activities (e.g. nautical tourism, aqua tourism, adventure tourism and sun & beach tourism).   |          |
|  |  | Develop blue tourism pilot schemes at tourist attractions associated with underwater ecosystems in prioritized coastal destinations.  |          |
| Resilient and Adaptable Tourism Destinations | Sustainable Tourism Risk Management        | Incorporate environmental and natural capital damage prevention criteria into the tourism Risk Management System, in order to develop capacities to resolve potential environmental situations that could negatively impact the development of tourism attractions and destinations, service provision and businesses economic sustainability.  |          |
|  |  | Incorporate climate change mitigation and adaptation into Vice-Ministry of Tourism technical assistance processes for planning, tourism security and product design.  |          |
|  |  | Develop and publish guidelines for mitigating and adapting to climate change in: i) tourism planning; ii) the design and diversification of tourism products; iii) tourism security processes; and iv) services and operations in different types of tourism, particularly those most vulnerable to climate change.   |          |
|  |  | Carry out a diagnostic study on the consequences of climate change for tourism supply management, with particular emphasis on strategic ecosystems (high mountain, beach and flood plain) and types of tourism that are highly dependent on climate conditions and ecosystem integrity (e.g. adventure tourism, sun & beach tourism, agritourism, scientific tourism and aqua tourism). |          |

| Program   | Project  | Indicative Actions  | Deadline |
|---|--|---|----------|
| <b>Resilient and Adaptable Tourism Destinations</b> | <b>Sustainable Tourism Risk Management</b>           | Develop guidelines to incorporate risk management strategies into general municipal risk management plans, in line with the risk management component of land-use regulations.  |          |
|   |  | Implement climate change adaptation pilot projects, with special emphasis on tourist attractions and destinations located in the following ecosystems: high mountain, paramo, wetland, beach, insular and coral reef.   |          |
| <b>2030 Pact for Sustainable Tourism</b>            | <b>Cross-ministerial Sustainable Tourism Agendas</b> | Establish working relationships with organizations responsible for national sustainability initiatives and strategies and present a proposal to integrate tourism into their lines of action.   |          |
|   |  | Present a work agenda proposal to the Superior Tourism Council and the Tourism Advisory Council for analyzing sustainable tourism needs and developing and implementing strategies to improve the environmental performance of the industry value chain.  |          |
|   |  | Develop and implement a cross-ministerial agenda that allows the Vice-Ministry of Tourism and the Ministry of Environment to agree and coordinate actions that develop sustainable tourism.   |          |
|   |  | Develop and implement a cross-ministerial agenda for the Vice-Ministry of Tourism and the Ministry of Energy to develop joint activities that improve energy efficiency in the tourism industry, encourage a move towards renewable energy and decrease long-term dependence on fossil fuels.   |          |
|   |  | Propose actions to improve Colombia's sustainability position on the World Economic Forum Travel & Tourism Competitiveness Report, and similar indexes that measure environmental sustainability policies in the tourism industry.  |          |
|   |  | Formulate and execute a national strategy to strengthen sustainable tourism in regions with emblematic natural, landscape and cultural attractions, protected areas, archeological areas and other tourism-worthy spaces, in line with the Tourism Sector Plan 2018-2022.   |          |
|   |  | Establish national guidelines and/or recommendations on how tourism should be incorporated into land-use plans to identify areas where tourism will benefit local communities and the environment, and establish conditions under which tourism and infrastructure projects can be developed to favor sustainable regional development. |          |

| Program   | Project  | Indicative Actions   | Deadline |
|---|--|--|----------|
| <b>2030 Pact for Sustainable Tourism</b>                                  | <b>Cross-ministerial Sustainable Tourism Agendas</b> | Develop and implement a cross-ministerial agenda for the Vice-Ministry of Tourism and the Ministries of Science and Technology to include technology and digital transformation tools in sustainable tourism objectives, and develop technology nodes along tourism corridors and routes.  |          |
|   |  | Incorporate indicators into the Colombian Regional Tourism Competitiveness Report (ICTRC) that measure how well the country's departments have adopted sustainable tourism guidelines.   |          |
|   | <b>Sub-sector Sustainable Tourism Agendas</b>        | Develop cross-sectional or subsector public-private sustainability initiatives that are aligned with the Tourism Advisory Council's agenda. These should be led by trade associations, and include microentrepreneurs, community tourism associations and other non-unionized parties. They should include a work plan geared towards comprehensively managing environmental impact in all subsectors. |          |
| <b>International Cooperation and Partnerships for Sustainable Tourism</b> |  | Subscribe to coalitions and actively participate in global public and private organization activities (UNWTO, OECD, UNEP, etc.) that share the mission of implementing transformative solutions for sustainable tourism growth.  |          |
|   |  | Establish partnerships with international councils to increase recognition of Colombia's efforts in sustainable tourism.   |          |

Long    Medium    Short



### What Problem does it Solve?

Insufficient conditions and incentives related to the use of natural capital in tourism's added value proposition.

### What are its Causes?

-  A lack of specialized tourism products based on regional biodiversity.
-  A lack of high-value tourism supply chains supported by regional natural values.
-  Insufficient mechanisms for integrating local communities into the tourism value chain in regions of special environmental and ecological value.
-  Limited diffusion, application and development of incentives promoting tourism as a conservation factor for natural capital.
-  Limited allocation and use of financial resources for developing sustainable projects, products and activities.

## Strategy 3. Promoting Investment and Innovation in Sustainable Tourism

This strategy will promote tourism with the greatest added value by generating conditions, incentives and financing mechanisms for innovation and the greening of the industry, through the responsible use of natural capital as a competitive advantage.

### Why is it Important?

**Governments must create a competitive environment that is aligned with other domestic strategies, and a framework of incentives that support the private sector in creating differentiated products, constructing supply chains and developing sustainable tourism projects that contribute to local economic growth.**

1. In remote areas of the country, such as the Amazon forest and the eastern plains, **tourism is concentrated in the Departments of Amazonas, Guaviare and Vaupes, and contributes 12.3% to regional GDP** but only 0.1% to national GDP. These departments have enormous potential for developing tourism products and services based around knowledge and use of biodiversity, but to date this has not happened.
2. **Tourism businesses represent just 16.6% of the country's green businesses.** This suggests that more green businesses could be developed in the tourism industry to diversify regional economies and create jobs by increasing comparative and competitive regional advantages.
3. **Although Payments for Ecosystem Services (PES)<sup>7</sup> have benefits in conserving and protecting natural capital, currently just 65,000 hectares use this mechanism.** This figure is low when compared to other similar initiatives in Latin America, such as *Socio Bosque* in Ecuador (1,271,299 hectares), the PES program in Costa Rica (1,052,867 hectares) and the PES program in Mexico (3,232,000 hectares).
4. Use of *Bancoldex* sustainability credit lines and energy efficiency schemes by tourism businesses is in its infancy. **Between 2018 and 2019, only 24 loans were given to tourism businesses.**
5. Although there are a growing number of tourism clusters in Colombia, **the supply chains they create are not coalescing enough to create tourism business initiatives based on regional natural capital**, that contribute to increasing the financial benefit of tourism for local communities and generate appropriation of their natural value.
6. **There are insufficient business partnerships between tourism service providers and supply chains in other trade sectors** that also rely on regional natural capital. These links are especially relevant in rural areas, where they have the potential to reduce the number of intermediaries, contribute to formalization, build social capital and generate economic growth.
7. Although tourism is recognized as the principal sustainable economic activity in the face of deforestation and the degradation of ecosystems by other extractive activities, **there are currently no incentives for converting these activities into tourism** and preserving strategic environmental areas.
8. Both a lack of public communication and legislative limitations restricting tax benefits mean that **investment incentives are being underused by tourism stakeholders for environmental control and enhancement**, non-conventional and renewable energy, and research, technological development and innovation.
9. **There are not enough incentives for incorporating sustainability criteria into tourism promotion**, infrastructure and competitiveness projects submitted to the Tourism Development Fund (Fontur).
10. **Colombia is yet to develop strategies that integrate sustainability** guidelines into tourism infrastructure life-cycles. Nor has it implemented incentives that encourage investment in sustainable tourism infrastructure.

<sup>7</sup> Article 4, Act 870: 2017 states that **Payments for Ecosystem Services** are the economic incentives, expressed in money or kind, used by the beneficiaries of environmental services to reward the owners, holders or occupants of lands, for their preservation and restoration efforts in strategic areas and ecosystems.

## Roadmap for Promoting Investment and Innovation in Sustainable Tourism



### Program 6. Colombia, a Biodiverse Tourism Powerhouse.

Colombia's mega-biodiversity represents a world-class potential for tourism, and this program will highlight, manage and consolidate the role of its natural and environmental assets in the industry's value proposition. This will be achieved by developing innovative, competitive and differentiated tourism products that involve communities as service providers and create opportunities in tourism markets. These products will be linked to emblematic regional tourist routes of great environmental value that create competitive chains and increase Colombia's recognition within South American natural capital routes. This program will be executed via two projects:

**1. Innovative and Sustainable Tourism Products.** This project sees biodiversity as a strategic asset that generates innovation in tourism and transforms the

way Colombia presents itself to potential visitors. Innovation in tourism products must be unique to the opportunities of each region, its communities, biodiversity, culture and ancestral customs.

**2. Natural Capital Routes of Colombia.** This project will join destinations to form routes that highlight quality, sustainability, biodiversity and natural resources, and generate high-value tourism supply chains based around regions' natural assets. This regional portfolio will position the country internationally and generate a more solid business network for tourism.



### Program 7. Incentives for Sustainable Tourism Development

This program has two objectives related to financing and investment schemes for sustainability. The first consists of informing, developing and facilitating industry value chain stakeholder access to incentives that promote tourism as a way of preserving Colombia's natural capital. The second con-

sists of allocating more funds to developing sustainable tourism projects, products and activities. To this end, three large projects will be carried out:

**1. Easier Access to Sustainability Incentives.** This project will create the legal conditions necessary to offer tourism industry tax incentives for investing in tourism activities and products that meet conservation criteria and implement technologies that preserve and restore biodiversity and renewable natural resources. Furthermore, mechanisms will be developed to inform tourism service providers and businesses about the incentives.

**2. Conserving and Restoring Biodiversity Through Tourism.** This project will facilitate tourism with a positive effect on natural capital protection, restoring ecosystem services, conserving valuable natural resources, and mitigating climate change. Compensation schemes and environmental service payments will be developed so that tourism becomes a driver of conservation and regional added value.

**3. Promoting Investment in Sustainable Tourism.** This project will develop and publicize sustainable investment opportunities on behalf of

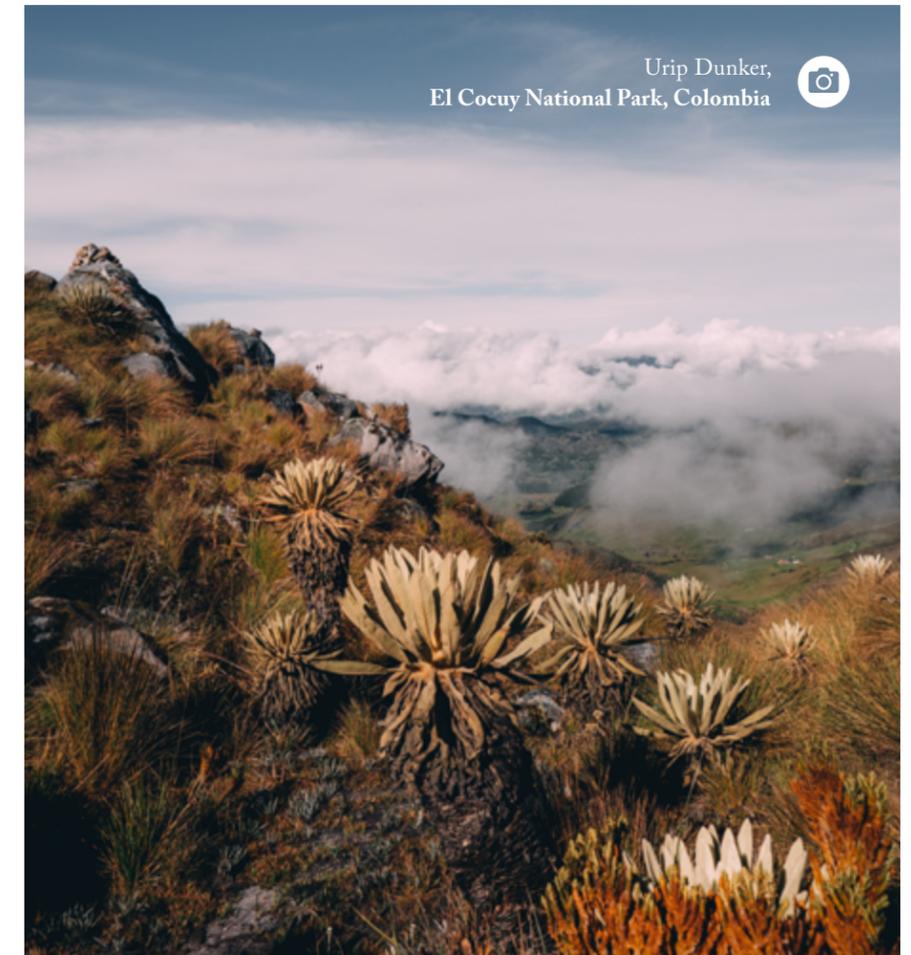
the tourism value chain. It will create incentives to ensure that projects submitted to the Tourism Fund (Fontur) incorporate sustainability criteria, and develop financial instruments for investments in comprehensively managing the industry's environmental footprint.



### Program 8. Stimulating Innovation in Sustainable Tourism

This program will increase innovation in the tourism industry by developing activities that promote creativity and competitiveness in businesses and destinations. Two projects will be implemented:

**1. Innovative Destinations and Businesses.** This project will stimulate innovation, renovation and creativity in businesses and companies that have an impact on sustainable tourism, encourage the development of initiatives promoting sustainability within the tourism industry and its supply chain, and implement social innovation processes that help overcome the main sustainability challenges faced by destinations and local communities.



Urip Dunker,  
El Cocuy National Park, Colombia



**2. Sustainable Infrastructure.** This project will implement strategic guidelines for green<sup>8</sup> and blue<sup>9</sup> tourism infrastructure that significantly reduce tourism's environmental footprint and contribute to climate change adaptation. Various types, technologies, means of construction and operation will be developed for sustainable tourism infrastructure that are multi-functional, generate a variety of ecosystem services and can adapt to different regional and socio-environmental dynamics.

**8.** According to the European Commission, "green infrastructure aims to enhance nature's ability to deliver multiple valuable ecosystem goods and services, such as clean air or water."

**9.** Blue infrastructures considers water supply, efficiency and management in its operation, and seeks to counteract the effects of climate change.

| Program  | Project  | Indicative Actions  | Deadline  |
|--|--|---|---|
| <b>Colombia, a Biodiverse Tourism Powerhouse</b> | <b>Innovative and Sustainable Tourism Products</b> | Diversify and develop tourism products based on regional biodiversity by identifying bioregions and defining biogeographic and ecosystem aspects of sites with great tourism potential.   |   |
|  |  | Develop unique tourism products that are linked to endemic components of biodiversity, geography and landscape, and focus on their conservation.  |   |
|  |  | Formulate and implement a program to create productive chains for high-value tourism based on regional biodiversity. This program may also create connections between tourism businesses and other non-industry green businesses that reduce commercial mediation between businesspeople and small rural producers and suppliers. |   |
|  | <b>Natural Capital Routes of Colombia</b>          | Design tourism narratives that explain each region's unique environmental value and natural richness, and develop technical assistance strategies to integrate them into tourism marketing.   |   |
|  |  | Create, diversify and improve tourism routes designed around Colombia's natural capital that contribute to conserving regional ecological value.  |   |
|  |  | Create a community ecosystem monitoring network for destinations that identifies potential changes and decides mitigating actions.  |   |
|  |  | Create opportunities for communities and citizens to participate in productive chains, product diversification and route development processes based on regional natural capital.   |   |
|  |  | Design and implement tourist routes in regions with Denomination of Origin certifications, recognizable certified brands, etc., that emphasize understanding, appropriation, promotion and the sustainable use of natural capital.  |   |
|  |  | Present a proposal to modify the tourism industry's regulatory framework and adjust existing tax benefits for investing in preserving and efficiently using natural resources, and in environmental improvements that meet the needs of the tourism sector and its stakeholders.  |   |
|  |  | <b>Easier Access to Sustainability Incentives</b>   | Design a plan to promote access to the tax benefits available to businesses and stakeholders for investments in: i) renewable and non-conventional energy sources; ii) environmental control and improvement (e.g. better disposal strategies, efficient use of energy and water); and iii) science, technology and innovation. |

| Program   | Project  | Indicative Actions   | Deadline |
|---|--|--|----------|
| <b>Incentives for Sustainable Tourism Development</b> | <b>Conserving and Restoring Biodiversity Through Tourism</b> | Develop an environmental services offsetting and payment scheme that promotes, manages and incentivizes climate change mitigation, water conservation and protecting natural capital.  |          |
|   |  | Create and share with environmental authorities a register of nature tourism areas available for compensation schemes for any loss of biodiversity (forestry use permits and environmental licenses).  |          |
|   |  | Design and implement a communications strategy for tourism service provider initiatives related to conserving, restoring and preserving threatened species and ecosystems.   |          |
|   | <b>Promoting Investment in Sustainable Tourism</b>           | Develop a support mechanism for environmental compensation for loss of biodiversity caused by tourism, using regional and local portfolios.  |          |
|   |  | Develop pilot projects for environmental and landscape restoration of emblematic tourist attractions.  |          |
|   |  | Develop and implement incentives for incorporating environmental sustainability criteria (e.g. "bonus points" scheme, modified evaluation criteria with greater weighting on sustainability in the analysis of project relevance) into promotion, infrastructure and competitiveness projects submitted to Fontur.   |          |
|   |  | Create a special line of green credit in the <i>Bancoldex</i> productivity portfolio for tourism businesses that want to implement technology, renovate or repair facilities, purchase specific equipment and/or modernize their infrastructure to improve sustainability or environmental efficiency (e.g. installing low-flow showerheads, water filtering systems, solar panels, efficient lighting systems, etc.). |          |
|   |  | Develop a strategy to disseminate the options available to tourism companies for investing in cost-effective renewable energy sources and close gaps between stakeholders in relation to energy efficiency (e.g. Power Purchase Agreements).   |          |

| Program  | Project                                     | Indicative Actions  | Deadline |
|--|---|---|----------|
| Incentives for Sustainable Tourism Development | Promoting Investment in Sustainable Tourism | Identify and disseminate information on compensation schemes, green bonds and project portfolios for tourism service providers and investors.   | ●        |
|  |   | Develop and implement mechanisms so that green businesses applying for the Ministry of Commerce, Industry and Tourism's programs get priority access and/or have additional points added to their evaluation.   | ●        |
| Innovative Destinations and Businesses         |   | Launch a challenge competition to finance innovation projects in solid waste management through circular economy models in the tourism value chain and/or eco-design projects associated with products and supplies used by tourism businesses.   | ●        |
|  |   | Implement intellectual property tools in the tourism industry with the purpose of improving innovation and sustainability in attractions, companies, destinations and organizations linked to the industry value chain.   | ●        |
|  |   | Develop social innovation processes that emphasize solutions to destination sustainability problems and mitigate the impact of tourism on local communities.  | ●        |
| Stimulating Innovation in Sustainable Tourism  |   | Incorporate social innovation strategies and environmental sustainability principles into community tourism, rural tourism and nature tourism programs.   | ●        |
|  |   | Develop a manual for integrating tourism infrastructure into surrounding natural systems during tourism planning and management that respects regional and traditional uses. The manual must include information on how tourism infrastructure can contribute to natural disaster prevention and mitigation, and adaptation to climate change.  | ●        |
| Sustainable Infrastructure                     |   | Develop and disseminate sustainable infrastructure guidelines for implementing existing legislation (e.g. National Economic and Social Policy Council (CONPES) document 3919 and Resolution 0549, 2015) to different subsectors of tourism and incorporate best practice in: i) reducing construction waste, sustainably purchasing supplies and materials and minimizing carbon footprints; ii) adequately treating wastewater; iii) saving water and energy; and iv) protecting nearby strategic ecosystems (oceans, paramos, forests, etc.). | ●        |

● Long      ● Medium      ● Short

*This project will stimulate, innovation, renovation and creativity in businesses and organisations working in the sustainable tourism supply chain.*





## Strategy 4.

### Advancing the Business Sector's **Sustainable and Responsible** Management of Natural Capital

This strategy will develop and implement tools that build awareness of the need for tourism businesses and service providers to mitigate, control and offset their negative environmental impact. Actions to address environmental impact are specifically related to:

- **Water** conservation.
- **Energy** efficiency and investment in renewable energy.
- **Solid waste** management.
- Sewage and **wastewater treatment**.
- Reduction of **carbon emissions**.
- Protection of critical **ecosystems and biodiversity**.

#### What Problem does it Solve?

A lack of mitigation, control and offsetting measures for negative environmental impact by the private sector.

#### What are its Causes?

-  High generation of solid waste that is inadequately managed and disposed of by businesses and value chain stakeholders.
-  Inefficient and irresponsible water use by businesses and value chain stakeholders.
-  Intensive energy use and lack of clean, renewable and non-conventional energies by businesses and value chain stakeholders.
-  Rising greenhouse gas emissions produced by the tourism industry.
-  High volume of wastewater generated by the tourism industry that is not treated properly and/or is discharged to the ground or bodies of water.
-  Inadequate application of quality and sustainability standards and policies.
-  Lack of ownership and knowledge of natural capital by businesses and value chain stakeholders.
-  Business and stakeholder practices that threaten biodiversity and ecosystems.

#### Why is it Important?

**To guarantee tourism's competitiveness in the long run, tourism businesses must incorporate sustainability criteria into their business models. These criteria must improve their environmental performance and preserve the natural capital on which their products and services depend.**

1. A March 2020 Vice-Ministry of Tourism survey found that:
    - **86.5% of respondents (tourism service providers) state that they lack knowledge related to implementing sustainable practices in their businesses.**
    - Although 92.9% of respondents state that they have implemented a strategy to reduce their energy consumption, **only 16.7% have seen a significant reduction over the past year.** In addition, only 20% of respondents use renewable or non-conventional energy.
    - 88.4% of respondents state that they have implemented a strategy to reduce water consumption. However, **only 23.2% have actually significantly reduced consumption over the past year.** In addition, 41.1% reported experiencing water problems or shortages, either constantly or seasonally.
    - **74.7% of respondents do not record their GHG emissions.** Less than half (43.8%) have set emissions reduction goals for their businesses, and of this number just 29.3% report that their emissions have decreased over the past year.
  2. The most recent DANE Environmental Survey of Hotels (2015) determined that:
    - **Only 49.3% of accommodation establishments treated their wastewater in some way.**
- Hotel investment in solid waste management fell by 28.7% compared to 2014, **but expenditure grew by 22.4% in the same period and the volume of solid waste reused, donated, recycled or sold decreased by 7.9%.**
3. **Involvement of tourism businesses in institutional programs designed to improve productive sector sustainability is low.** Just 39 tourism companies have applied to join the 'Factories of Productivity' program (only one chose the energy efficiency line and none chose sustainability).
  4. **Of 160 companies that have become a 'Collective Benefit and Interest Company', (promoting a better relationship with the environment), only 5 are tourism companies (3%).**
  5. According to a technical verification report on the implementation of Sectoral Technical Standards for Sustainable Tourism (NTS-TS in Spanish), **only 7% of verified tourism service providers meet all requirements of the standards.**
  6. A Vice-Ministry of Tourism analysis of the NTS-TS found that **73% of tourism service providers gave medium, to low-medium priority to the environmental impact of their activities.** This indicates that they do not believe they need to execute short-term actions that reduce their environmental footprint.
  7. Environmental penalties imposed on tourism service providers are evidence that **many of them do not comply with the regulations.**
  8. **Some tourism businesses continue to pose a threat to biodiversity** by following practices such as selling banned or protected meat or fish, selling handicrafts and souvenirs made with animal parts and using animals as tourist attractions, among others.

## Roadmap for Advancing the Business Sector's Sustainable and Responsible Management of Natural Capital



### Program 9. Foundations for Sustainable Tourism

This program will lay the foundations for a sustainable tourism business culture that incorporates sustainability criteria into its business models. It consists of raising awareness, providing training and encouraging the adoption of sustainability criteria and content by entrepreneurs and businesspeople. It will also develop technical tools to establish guidelines and conditions that improve businesses' environmental performance. To fulfill this goal, three projects will be implemented:

- 1. Technical Tools for Sustainable Tourism Businesses.** This project consists of designing, implementing and disseminating technical tools and support instruments that establish concrete guidelines for comprehensively managing negative

externalities in tourism and implementing sustainable planning, consumption, production and operational business practices.

- 2. Raising Awareness of Sustainable Tourism.** This project focuses on raising awareness of the need for businesses to improve environmental performance to preserve the integrity of tourism destinations and attractions, and ensure the wellbeing of local communities, the competitiveness of their businesses and the long-term growth of tourism. To achieve this a number of awareness efforts will be carried out, such as support strategies and communications campaigns.
- 3. Training in Sustainable Tourism.** This project will improve the sustainability component of current industry training programs for tourism entrepreneurs and businesspeople, tour guides, and the School Friends of Tourism program, all of which play a crucial role in closing the gap between academia and professional tourism experience.



### Program 10. Roadmap for a Green Tourism Industry

This program builds on the above and will go one step further in

developing and implementing transformative solutions for sustainability. These strategies seek to generate structural change to ensure tourism business and supply chain sustainability, and to consolidate low carbon tourism that takes responsibility for its environmental footprint with circular production cycles and a commitment to mitigating and offsetting negative impact. The following projects will be implemented:

- 1. Mitigating Tourism's Environmental Footprint.** This project seeks to consolidate the transition towards sustainable business operations, contribute to the responsible use of natural resources, conserve biodiversity and the environment where tourism takes place, and responsibly manage solid waste and wastewater. The project includes actions designed to generate structural change in tourism subsector operations according to their environmental performance needs, capacities and goals.
- 2. Colombia, a Plastic-Free Destination.** This project will ensure that Colombia joins the Global Tourism Plastics Initiative, led by the UNWTO and the United Nations Environment Program (UNEP), in collaboration with the Ellen MacArthur Foundation. The objective is to inspire change and eliminate the unnecessary use of plastics



Paola Sánchez Gómez  
Owl Frailejon, Nevados  
Park, Risaralda



at destinations and by tourism businesses. It will implement innovative actions to reuse or recycle any unavoidable plastics, and circulate solid waste so that it remains in the economy and is not returned to the environment. This responds to an understanding of the challenges that plastic contamina-

tion brings to Colombia's water richness.

- 3. Caring and Regenerative Tourism.** This project responds to new trends that use tourism as a medium to actively restore, rehabilitate or recover ecosystems and the regions where they are located. It proposes a

series of innovative initiatives that involve the business sector personnel in transforming tourism businesses into agents of change and promote environmental reparation in the areas they operate.



**Program 11. Sustainable Tourism Quality Standards**

This program will overcome barriers resulting from inadequately implementing sustainability standards and norms, and promote certification to improve environmental performance. The program will be executed via two projects.

**1. New Regulations and Standardization for Sustainable Tourism Quality Standards.**

This project will improve standardization and technical regulations for sustainable tourism. Additionally, and in line with the Tourism Sector Plan, it will integrate Colombian Environmental Seal initiatives and tourism quality and sustainability certifications for businesses.

**2. Promotion of Sustainable Tourism Quality Standards.**

This project will encourage

tourism service providers to take ownership of quality and sustainability processes, promote sustainability certifications as a differentiating factor among tourism businesses and encourage recognition of certified service providers by domestic and international tourists. Specialized promotion, dissemination and communications actions will be carried out to achieve this.



Ecoplanet Foundation  
Zona Cuzco, Desierto de la Tatacoa, Huila

| Program                             | Project  | Indicative Actions   | Deadline |
|-------------------------------------|--|--|----------|
| Foundations for Sustainable Tourism | Technical Tools for Sustainable Tourism Businesses | Design and disseminate a best practice handbook, practical guide or checklist that tourism businesses (accommodation facilities, food establishments, air transport, land transport, travel agencies, tour operators, cruises, etc.) can adopt to reduce their environmental footprint by: i) reducing the volume of solid waste they produce and disposing of it properly; ii) conserving and using water efficiently; iii) managing energy and investing in renewable energy sources; iv) reducing greenhouse gas emissions; v) treating wastewater; and vi) protecting biodiversity and ecosystems. |          |
|                                     |  | Update and disseminate best practice guides for nature tourism that incorporate specific guidelines for protecting biodiversity and strategic ecosystems. Include a chapter for tour guides on the advice they should give visitors on how to avoid negatively impacting natural capital.  |          |
|                                     |  | Launch a call for proposals from tourism businesses that want to implement systems to measure their environmental footprint or adopt standards such as the Global Reporting Initiative - GRI.  |          |
|                                     |  | Develop and publish a handbook on wildlife protection in the tourism industry that includes: i) guidelines for viewing and interacting with wildlife (e.g. birds, whales, pink river dolphins); ii) recommendations for purchasing souvenirs and avoiding products made from parts of threatened animals (e.g. skin, bone, shell); iii) gastronomic advice to avoid dishes made with protected fauna or threatened species (e.g. iguana, turtle); and v) sanctions and restrictions on selling handicrafts and foods made using wildlife and/or threatened species.                                    |          |
|                                     |  | Design a sustainable gastronomy guide for tourism businesses (e.g. restaurants, hotels and cruises) that promotes sustainability in food purchasing and production, the continuous monitoring of food waste, proper waste disposal, and supporting local food production.  |          |
|                                     |  | Produce and disseminate case studies highlighting tourism businesses that have implemented initiatives related to water conservation, energy management, solid waste management, wastewater treatment, reducing GHG emission, and protecting biodiversity and ecosystems. The studies must explain how these practices are reflected on the company balance sheet.   |          |

| Program                             | Project  | Indicative Actions   | Deadline  |  |
|-------------------------------------|--|--|---|--|
| Foundations for Sustainable Tourism | Technical Tools for Sustainable Tourism Businesses | Identify best practice in corporate social responsibility for sustainable tourism, promote the inclusion of other stakeholders and interested parties and highlight and incentivize success stories, with the purpose of comprehensively managing the industry's environmental footprint.  |   |  |
|                                     |  | Publish a guidebook on protecting natural capital based on the local knowledge of community tourism, rural tourism and ecotourism service providers in different regions of the country.   |   |  |
|                                     |  | Publish a handbook for sustainably developing emblematic natural attractions and landscapes included in UNESCO's Representative List of the Material and Intangible Cultural Heritage of Humanity, National Archeological Parks and National Nature Parks, with an emphasis on cultural practices and expressions related to Colombia's natural capital. |   |  |
|                                     | Raising Awareness of Sustainable Tourism           | Foundations for Sustainable Tourism  | Present a proposal to adjust the sanctions that can be imposed on tourism service providers and related value chain stakeholders for environmental violations.  |  |
|                                     |  |  | Increase the scope of the 'Clean Colombia' campaign to ensure greater impact in the regions by encouraging tourism value chain stakeholders to implement comprehensive solid waste management strategies and keep attractions and destinations clean.                             |  |
|                                     |  | Raising Awareness of Sustainable Tourism   | Develop a campaign linked to the 'Buy Local' platform that encourages the purchase and acquisition of local products and supplies (zero-kilometer products) by the tourism sector, with a view to reducing product supply chain emissions (Buy Local, Buy Zero Km).               |  |
|                                     |  |  | Develop an awareness campaign for environmental impact, differentiated by type of business, principal source of pollution or use of resources (e.g. for hotels: Did you know that for every water bottle you do not use you get 3 hours of energy from a 60-Watt light bulb?).    |  |
|                                     |  |  | Schedule and carry out verification and control visits to check compliance with carrying capacity and limits of acceptable change studies at tourism destinations and attractions. The visits must be conducted jointly with the responsible authorities and the local community. |  |
|                                     |  |  | Schedule and carry out awareness and control activities at tourist attractions to identify illegal possession of wildlife, the sale of handicrafts made with animal products and the sale of foods made from wild animals.  |  |
|                                     |  |  | Training for Sustainable Tourism  | Include content on environmental sustainability in the School Friends of Tourism program's institutional education projects. |

| Program                             | Project                              | Indicative Actions  | Deadline   |  |
|-------------------------------------|--------------------------------------|---|--|--|
| Foundations for Sustainable Tourism | Training for Sustainable Tourism     | Include content or units on sustainable tourism in the syllabus of the SENA technical tour guide program and other training courses for tour guides.  |  |  |
|                                     |                                      | Design and execute specialized training actions for national and local tourism authorities, trade unions, businesspeople and tourist attraction administrators around basic concepts related to environmental regulations in tourism, the Framework Convention on Tourism Ethics and the 2030 Development Agenda. |  |  |
|                                     |                                      | Improve the sustainability content of the Tourism Export Training Program and include units on sustainability practices that can be employed in different tourism segments.   |  |  |
|                                     | Roadmap for a Green Tourism Industry | Mitigating Tourism's Environmental Footprint  | Develop, together with SENA and academia, guidelines for the basic legal and environmental management content that must be included in higher education tourism training programs, the SENA technical degree program for tour guides, and employee training programs.  |  |
|                                     |                                      |   | Adapt and implement the UNEP Roadmap for Low Carbon and Resource-Efficient Tourism <sup>10</sup> to the Colombian tourism value chain.   |  |
|                                     |                                      | Mitigating Tourism's Environmental Footprint  | Work with the Civil Aviation Authority to develop guidelines that help airlines reduce their carbon footprint in air and land operations. This includes the measures contained in the CORSIA agreement, optimized air routes that avoid unnecessary stops, the need to focus promotional efforts on nearby markets, offsetting schemes for travelers, etc. |  |
|                                     |                                      |   | Design and launch a circular economy connections program for the tourism value chain and its suppliers, in which the participation of local small and medium businesses is encouraged.   |  |
|                                     |                                      |   | Implement dissemination actions for tourism businesses to apply for the sustainability and circular economy lines of the 'Factories of Productivity' program.  |  |



<sup>10</sup>. The objective of this roadmap is the development of low-carbon and resource-efficient tourism. It has been applied and developed jointly with the tourism industry in the Philippines, Dominican Republic, Saint Lucia and the Republic of Mauritius, mainly for accommodation services.

- Long
- Medium
- Short

| Program                              | Project                                      | Indicative Actions  | Deadline  |  |
|--------------------------------------|--|---|---|--|
| Roadmap for a Green Tourism Industry | Mitigating Tourism's Environmental Footprint | Develop plans that promote water conservation by tourism value chain stakeholders in destinations where water is scarce (in high season or across the entire year). These plans must encourage responsible water use practices and include specific goals that ensure tourism does not interfere with the supply or availability of water to residents. |   |  |
|                                      |  | Implement a carbon calculator that allows tourism businesses to regularly monitor progress (individually and by subsector) in relation to mitigating the contribution of tourism to climate change.   |   |  |
|                                      |  | Develop an eco-labels program for tourism products and supplies that introduces environmental responsibility criteria into the industry supply chain.   |   |  |
|                                      |  | Support the design of a specialized micro-mobility framework for tourism in capital cities.   |   |  |
|                                      | Colombia, a Plastic-Free Destination         | Subscribe to the Global Tourism Plastics Initiative, and develop a support system for tourism service providers that also want to subscribe to the initiative and eliminate, innovate and circulate the solid waste produced by their businesses.   |   |  |
|                                      |  | Open discussion forums between environmental authorities and regional organizations to design regulatory restrictions for single-use plastics at tourist beaches and in other strategic ecosystems (e.g. paramos).  |   |  |
|                                      | Caring and Regenerative Tourism              | Implement a 'Sustainable Brigades' program for industry staff in which they can volunteer to look after strategic ecosystems (e.g. cleaning nearby beaches, planting trees in surrounding forests, etc.).   |   |  |
|                                      |  | Launch regenerative tourism campaigns (e.g. tree-planting marathons) that restore, rehabilitate or recover affected regional ecosystems.  |   |  |
|                                      | Sustainable Tourism Quality Standards        | New Regulations and Standardization for Sustainable Tourism Quality Standards   | Review and update the NTS-TS (Sectoral Technical Standards for Sustainable Tourism) to simplify their application, adapt environmental requirements to the characteristics of destinations and tourism service providers, define minimum requirements, align the rules with international standards and elevate them within the national standardization process. |  |

| Program                               | Project   | Indicative Actions  | Deadline |
|---------------------------------------|---|---|----------|
| Sustainable Tourism Quality Standards | New Regulations and Standardization for Sustainable Tourism Quality Standards | Review and update the minimum requirements for tourism destinations to receive NTS-TS sustainability certification to align them with the guidelines of this Policy.  |          |
|                                       |   | Integrate the requirements for receiving the Ministry of Environment's Colombian Environmental Seal for accommodation and lodging into the NTS-TS for accommodation service providers so that there is just one national certificate.                 |          |
|                                       | Promoting Sustainable Tourism Quality Standards                               | Implement communications actions that position NTS-TS certification as a differentiating factor in the market and recognize the efforts made by certified tourism service providers to achieve compliance with environmental requirements.            |          |
|                                       |   | Develop an awareness campaign for travelers explaining Colombia's sustainability seals and their differentiating values, with a view to creating a preference for using certified companies and destinations.   |          |
|                                       |   | Partner with organizations in the National Quality Subsystem and encourage companies in the tourism value chain to certify products, processes and services in sustainable tourism technical standards, and in private sustainability certifications. |          |

Long    Medium    Short



## Strategy 5. Creating a Sustainable Travel Culture in Colombia

This strategy will promote responsible behavior and sustainable consumption practices among travelers and provide them with transforming experiences based on Colombia's environmental assets.

### What problem does it solve?

Irresponsible behavior and consumption by travelers (especially domestic tourism).

### What are its causes?



Insufficient environmental awareness programs for travelers.



Negative impact on natural capital caused by tourist behavior and consumption habits.

### Why is it important?

**Encouraging sustainable tourism includes raising tourists' awareness of their role in preserving the environmental and ecological value of the destinations they visit.**

1. Tourism's growth has proportionally raised travelers environmental footprint **both directly**, through anthropic actions affecting the natural environment, and indirectly, through the consumption of resources like water and energy.
2. In general, negative impact on natural capital caused by traveler behavior and consumption habits is linked to **inadequate use of resources and public services, increased solid waste and wastewater**
3. **A significant number of travelers are unaware of their environmental footprint, and an even greater number do not know how to offset it.** Those who do possess this knowledge may resist voluntarily offsetting their footprint because they see it as an extra cost.
4. **Colombia must make a sustained effort to raise awareness of sustainability in travel culture**, and implement strategies that raise awareness of the consequences of irresponsible travel practices and the role tourists play in sustainable tourism.

**production**, alteration of ecosystems, illegal trade in wildlife, loss of biodiversity, alteration to natural attractions and inadequate or excessive use of infrastructure, among others.

## Roadmap to Creating a Sustainable Travel Culture in Colombia



### Program 12. Sustainable Tourism Culture

This program will generate a sense of joint responsibility for preserving natural assets at tourism destinations.

It will help change traveler behavior and consumption habits related to the use of natural resources and public services, production of solid waste and wastewater, alteration of ecosystems and natural attractions, use of infrastructure and interaction with biodiversity. Tools will be designed that allow tourists to take ownership of sustainability and positively impact the places they visit. Two projects will be used to implement this program:

- 1. Creating Awareness of Responsible Tourism.** This project will oversee initiatives that encourage awareness of sustainable travel culture by sensitizing travelers to the environmental impact of their behavior and consumption habits

on the places they visit. Travelers will stop seeing themselves as being detached from destinations and better understand the role they play in conserving ecological value.

- 2. Colombia, a Sustainable and Transformative Tourism Experience.** This project will make tourist activity a visible agent of environmental protection and restoration. Travelers will be offered tourism products that allow them to become agents of change and give something back to the destinations and local communities they visit while enjoying authentic, local and transformative experiences.



Coffee culture

| Program   | Project                                     | Indicative Actions  | Deadline |
|---|---|---|----------|
| Sustainable<br>Tourism Culture                                      | Creating Awareness of<br>Responsible Travel | Include a new 'Responsible Traveler' category in the Tourism Awards for bloggers, Instagramers and YouTubers that encourage sustainable tourism in Colombia on their social media accounts.   |          |
|   |   | Improve the tourism ethics, sustainable appropriation of biodiversity and responsible behavior and consumption contents of the School Friends of Tourism program.   |          |
|   |   | Establish an online academy with short tutorials on travel culture and responsible tourist behavior that are delivered on social media by Instagram and YouTube influencers.  |          |
|   |   | Adopt the Responsible Traveler Manifesto and design a mass communications strategy to disseminate its principles to help tourists travel responsibly and sustainably around the country.  |          |
|   |   | Get local authority support for asking visitors to sign a symbolic ecological declaration on entry to Colombia's emblematic tourism sites that incentivizes them to be environmentally responsible.   |          |
| Colombia, a Sustainable<br>and Transformative<br>Tourism Experience |   | Design a tourism volunteer program for Civil Society Nature Reserves - private lands open to the public - located in areas of high touristic importance, where travelers can carry out environmental sustainability work that contributes to developing tourism. The program will establish the criteria, requirements and benefits for participating reserves. |          |
|   |   | Design innovative tourism products and experiences that allow travelers to contribute to preserving environmental value and act as agents of change in the places and communities they visit.   |          |
|   |   | Create incentives and special campaigns for reducing travelers' carbon footprints and implement 'Leave No Trace' practices and offsetting schemes.  |          |



Long



Medium



Short



## Strategy 6. Positioning Colombia as a Sustainable Tourism Destination

This strategy will develop specialized marketing and promotional strategies that highlight Colombia's commitment to natural capital protection, and strengthen its standing and reputation in sustainable tourism strategic markets.

### What problem does it solve?

Colombia's low recognition in sustainable tourism strategic markets.

### What are its causes?

-  A lack of market intelligence studies that guide the development of specialized tourism products for specific segments with an interest in sustainability.
-  A lack of strategic focus to market and promote Colombia as a value generating destination for biodiversity.
-  Insufficient focus on sustainability in marketing and promotion activities.

### Why is it important?

**One of the country's main competitive advantages is its natural capital, and greater emphasis must be placed on promoting Colombia in strategic markets for sustainable tourism and strengthening its reputation as a destination offering transformative experiences that create added value for the environment and local communities.**

1. Surveys by Booking show that globally, 87% of tourists want to travel more responsibly and 72% consider that it is necessary to act now by choosing more sustainable travel options that contribute to protecting natural capital. However, **this trend has not yet established itself as a clear preference in Colombia and has not been properly analyzed.**
  2. The Tourism Fund's (Fontur) research (2012) into source markets in the Americas found that international wholesalers think of Colombia as offering mainly budget sun & beach products. **This suggests a lack of specialized and viable supply to meet new demand trends, and poor leverage of distribution channels to promote the alternatives on offer.**
  3. According to Fontur (2011), **only 36% of domestic travelers can identify natural heritage destinations, and only 19.2% of domestic tourism demand is for nature (8.8%), rural (7.4%) and adventure (3.0%) tourism activities that cause minimal impact to the local natural and sociocultural environment.**
  4. **The country does not have updated market intelligence studies to identify demand segments with**
- an interest in sustainability and strategically orientate promotion.
5. **Attracting specialized demand segments is relevant because it raises awareness by way of example, and contributes to sensitizing tourists with less awareness of their environmental footprint** by showing them how their travel choices impact biodiversity and communities. It also has the capacity to elevate tourism business sustainability standards and tip the market balance towards preferring environmentally responsible products and practices and demanding high standards in service provision.
  6. According to the World Economic Forum Country Brand Ranking 2019-2020, sustainability is a determining factor for consumers when it comes to travel options. Costa Rica, for example, has managed to establish itself as the leader in sustainable travel in the Americas, **while Colombia is still unknown in this segment.**
  7. **In many instances, traditional tools used to market and promote tourism in the public and private sectors do not take into account their own environmental impact.** An example of this is the excessive use of paper and brochures, and even promotional plastics, which are highly polluting.
  8. A study carried out by SIPPO in 2019 **recommended that Colombia improve its sustainability ranking** by creating partnerships with internationally renowned travel agencies and certifying bodies with the highest global reputation.

Roadmap for Positioning Colombia as a Sustainable Tourism Destination



**Program 13. Colombia, a New Sustainable Destination in South America**

This program will implement marketing, communications and promotional activities to position Colombia as a destination with unique natural capital assets that sustainably manages its diverse and valuable attractions, products, services and experiences, and where local communities are the principal exponents of their own customs and cultures. These positioning actions will ensure that on the main traveler marketplaces Colombia is associated with sustainability and new dynamic and authentic tourism opportunities. This program will be executed via the following project:

**1. Sustainability: The Differentiating Factor of Tourism in Colombia.** The sustainability of destinations is a key competitiveness factor within their reference markets. This project will ensure that sustainability criteria are included in Colombia's added value communications strategy for tourism. Sustainability criteria will also be included in promotional and positioning campaigns to improve Colombia's image among potential visitors and its own residents as a sustainable travel destination that takes responsibility for its communities and biodiversity.



**Program 14. Sustainability Focused Tourism Marketing and Promotion**

This program will ensure that the transition towards sustainable tourism is reflected in tourism marketing, promotion, communications, sales and distribution techniques used by businesses and destinations. This will mean rethinking how these techniques are used in the marketplace, and with clients and employees, and incorporating additional variables related to environmental impact and value creation for communities and others. The program will be executed via one specific project:

**1. Tools for Sustainability Focused Tourism Marketing and Promotion.** This project will adapt regional, national and international tourism marketing and promotion strategies to meet the needs of new sustainability objectives and requirements in the industry. It will incentivize the design, execution and evaluation of marketing and promotion strategies that place sustainability at the center of market intelligence and segmentation activities; generating supply information; traveler communications; the distribution and sale of products, services and experiences; and brand reputation and value, among others.

| Program  | Project   | Indicative Actions   | Deadline |
|--|---|--|----------|
| Colombia, a New Sustainable Destination in South America | Sustainability: The Differentiating Factor of Tourism in Colombia | Integrate sustainability into domestic and international promotional campaigns that position Colombia as a sustainable tourism destination that takes responsibility for its communities and biodiversity.   |          |
|  |   | Nominate sustainable Colombian attractions, destinations, activities and experiences for international awards that recognize responsible and sustainable destinations and tourism practices, and highlight success stories.  |          |
|  |   | Develop specialized marketing, promotion and communications activities that improve Colombia's brand position, association and recall as a biodiverse destination that can be enjoyed responsibly and with a high degree of sustainability.  |          |
|  |   | Design a tool to monitor brand recall and position in strategic markets and principal source countries.  |          |
| Sustainability Focused Tourism Marketing and Promotion   | Tools for Sustainability Focused Tourism Marketing and Promotion  | Develop marketing and promotion activities (e.g. press and familiarization trips, participation in fairs, sponsorship) that focus on Colombia's sustainable urban and rural destinations, and better position Colombia in strategic source markets.  |          |
|  |   | Design and execute a marketing plan for sustainable tourism in Colombia that focuses on high-value tourism products, and client segments that take responsibility for the environment.   |          |
|  |   | Include sustainability criteria in domestic and international marketing and promotion tools and materials for attractions, services, activities, experiences and destinations (e.g. paperless practices).  |          |
|  |   | Improve sustainable tourism data and contents in the existing tourism apps and official web pages for the country's marketing and promotion.   |          |
|  |   | Conduct and disseminate market intelligence studies that guide the development of specialized tourism products for specific segments with a special interest in enjoying and preserving natural capital (e.g. sustainable tourists).   |          |
|  |   | Establish partnerships and agreements with domestic and international market channels to access information on trends, potential markets, strategic segments and sustainable tourism preferences. This includes national trade associations, networks and organizations specializing in sustainable tourism, certifying bodies and selected trade fairs. |          |



