



Sustainable Tourism in Colombia and its Potential for the European Market

A Market Scan

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1. Introduction, scope and limitations of the study

The Swiss Import Promotion Programme (SIPPO) is a longstanding, well-established initiative of the Swiss State Secretariat for Economic Affairs (SECO) with the overall vision of sustainable and inclusive economic growth and integration of SIPPO partner countries into world trade. The current phase of SIPPO started in April 2017, has a duration of 4 years and is implemented by a Consortium led by Swisscontact with BHP Bruggler and Partners and Helvetas Swiss Intercooperation as members. SIPPO works in 11 partner countries and 6 different product and service sectors. The programme works through Business Support Organizations (BSOs) in order to increase their export promotion capacity and service provision to export-ready companies.

Sustainable tourism is one of the six SIPPO sectors and Colombia, Peru, Albania and North Macedonia are the four SIPPO countries which work in this sector during the current programme phase. The BSO partners in sustainable tourism comprise a diverse group of organisations ranging from classic government-led tourism authorities (e.g. Albania), to export promotion agencies (e.g. Peru and Colombia), to more private sector led national business associations (e.g. North Macedonia) to dedicated responsible tourism associations (e.g. Colombia). In some countries, SIPPO has more than one formal BSO partner, such as for instance in Colombia.

The present market scan has been commissioned by SIPPO Colombia with the following objectives:

- Provide market intel on current trends in the area of sustainable tourism around the globe in general and in Europe specifically
- Provide market intel with regard to the main European actors (e.g. buyers, associations, networks) in the field of sustainable tourism
- Provide market intel concerning major competitors for Colombia in the area of sustainable tourism
- Bring forward recommendations on how Colombia's offer can make use of above trends and opportunities and match it with the growing demand for more sustainable tourism

The main target audience for this market scan consists of ProColombia¹ and ACOTUR² and will be used to inform their own export promotion strategies. Its results will be shared in connection with preparations for the WTM London 2019 and serve as basis for further development of their own organisational strategies.

The following elements define the scope and limitations of the study:

¹ ProColombia is a government agency of the Executive Branch of the Government of Colombia in charge of promoting Colombian non-traditional exports, international tourism and foreign investment to Colombia by providing domestic companies with support and integral advisory services for their international trade activities, facilitating the design and execution of their internationalization strategies, and by providing foreign companies with trade, legal, and educational information about Colombia's market, products, services and companies. www.procolombia.co

² The Association for Responsible Tourism, ACOTUR, brings together Colombian tour operators and tourism service providers with the specific aim to develop and promote sustainable tourism throughout Colombia. It currently comprises 104 members. www.acotur.co

- **Methodology:** The study is based predominantly on *desk research* and does not comprise primary data collection. It is in this sense reliable on existing data and its quality.³
- **Time:** The study is done with a limited amount of time input and will not be able to delve into a detailed analysis of specific segments. It is in this sense a *market scan* which will need to be backed up by further research, if it is to substantiate decisions for investments. Wherever possible, it will indicate sources for additional information.
- **Content:** The study has to focus on *selected aspects of sustainable tourism* and *selected segments of the European market*, as it would otherwise become too broad. This first process of narrowing down the scope of the study has been done by:
 - a. looking at the current market structure of international tourism arrivals in Colombia
 - b. looking at the key unique selling propositions in particular ACOTUR members can offer
 - c. looking at the main import destination countries covered by the SIPPO mandate (Switzerland and wider Europe)

This led to more focus on adventure, nature and culture tourism, as this is where Colombia and ACOTUR members are particularly well positioned (see Figure 1) and as these are segments which are closest related to sustainable tourism as a whole. It further led to a focus on Switzerland, Germany, France and the UK, as these are countries which are already strongly represented amongst the international tourists in Colombia, have been identified in Colombia's tourism strategies and plans as key focus markets (e.g. Plan de Negocio de Turismo de Naturaleza, 2013), have direct flight access to Colombia (e.g. London – Bogota), show strong growth prospects and a particular openness towards a more sustainable tourism experience. There are other source countries, such as the Nordic Countries, the Netherlands, Eastern European countries and Spain which would also comply with most of the above criteria, but which were excluded in order to reduce the scope of the study. They may be included

in a possible reiteration of the market scan in 2020 or beyond.

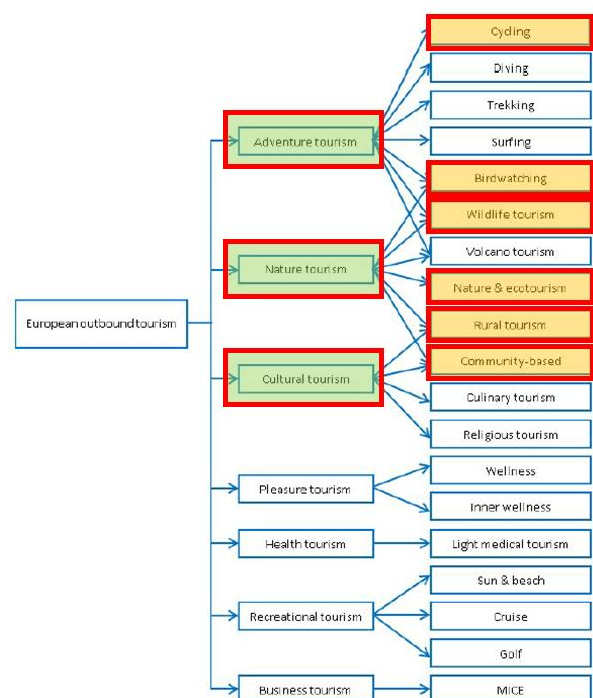


Figure 1: Segmentation of European Outbound Market and focus of market scan (CBI, 2018)

³ The study is able to make use of the results of a similar study carried-out by SIPPO Peru focusing on the French, Swiss and German markets using both desk and primary research methods.

Finally, the following aspects are crucial to put this market scan into the right context:

- Sustainable tourism is not a segment in itself and it makes little sense to treat as one. It refers to an aspirational term which puts a stronger focus on balancing profit, impacts on people and the planet within the travel industry. For this study, the focus is placed on specific segments which are more likely to attract tourists with a comparably stronger interest and awareness in the different aspects of sustainability (e.g. adventure, nature and culture), while sustainability in tourism should in principle be mainstreamed into every tourism segment.
- The majority of tourists are driven by multiple interests and cannot be put into strict segments. A tourist on a beach holiday, for instance, may well be interested to visit a community or do an adventure trip for a couple of days. Any product development and positioning need to be fully aware of this, understand motivations of different visitor flows and appeal to them in the right way.
- The tourism sector is inherently complex and does not function as a linear value chain. There is a variety of ways tourism service providers can reach out to their clients at different points throughout the traveller journey from direct contact through websites and social media, to OTAs and peer to peer platforms, to contact via tour operators. The appropriate channel mix will largely depend on the size and capacity of a service provider. For this study, we look mainly at distribution through Europe based outbound tour operators. It is important to underline, that the majority of travellers inclined to travel more sustainably are not travelling by tour operators but are organising their trips independently. To reach these travellers, tour operators and trade fairs are not likely to be the main tools to use, whereas a strong online and social media presence is.

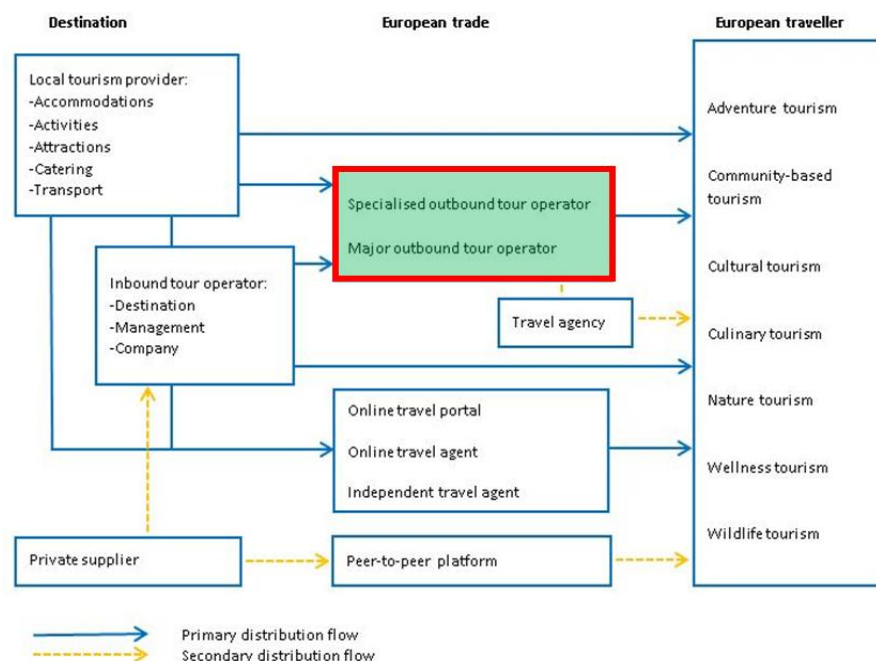


Figure 2: Diversity of distribution channels to reach European customers and focus of market scan (CBI, 2018)

2. Global and European trends in sustainable tourism

To have a tourism trend survey commissioned is almost a trend in itself and the range of organisations publishing their own trends analysis is growing year by year. In general, while there are nuances and differences between them, there are a few trends which are commonly emerging making them likely to be the main industry influencers. This chapter covers global, as well as Europe-specific trends related to sustainable tourism. Many of them are general trends for the industry and do not specifically apply to sustainable tourism only, but it is important to discuss them here, as they are intrinsically connected with each other and need to be discussed jointly, as sustainability increasingly becomes a mainstream topic in travel and tourism.

- **Continuous growth of tourism:** There is no doubt that travel and tourism will continue to grow on a global scale fuelled by a growing global middle class, an ever growing tourism offer and social media: until 2030 international arrivals are predicted to grow at 3.3% to a total of 1.8 billion and both the total global GDP and total employment contribution are estimated to be above 11% (WTTC, 2017). This will increase pressure on communities, societies and the environment and will give the sustainability aspect of travel much more importance.
- **SDGs, climate change and overtourism top the political and societal agenda:** The 17 Sustainable Development Goals (SDGs) to which all UN member states have agreed to in 2015 are the world's main road map to achieve a more sustainable planet by 2030. Countries are committed and accountable to act as international community and will device policies, funds and efforts to become more sustainable. Climate change in particular has received unprecedented attention in 2018 and 2019. A strong movement of young people appealing to politicians to act in order to save 'their' planet is receiving huge momentum with Europe at the forefront of this. Students demonstrating for climate protection are a common sight throughout Europe and movements like flygskam⁴ are gaining traction with the airline industry reporting to see clear impacts in terms of reduced customers.

More specific to tourism, over-tourism is making headlines throughout Europe and tourism decision makers are innovating towards a better management of visitor flows to diffuse pressure on hot spot destinations. These trends combined will lead to:

- a. A stronger commitment by policy makers and industry leaders to sustainability. It will become less and less possible to not embrace sustainability as an integral part of one's destination or business strategy. This will translate throughout the supply network down to the supplier of tourism services in destination countries. Real proof of sustainability commitments will gain in importance and labels and certification schemes are likely to gain in traction.
- b. A stronger tendency for more regional travel, for slower travel and for authentic experiences
- c. An opportunity for alternative destinations and experiences away from the main tourism hotspot
- **Technology as key industry disruptor:** Technology will remain one of the key disruptors of the travel industry. This affects all aspects of the customer journey from inspiration to booking to sharing of

⁴ Flygskam literally translates as 'flyshaming' and refers to a movement started in Sweden which brings together people who commit to not fly anymore, but use alternative means of transport.

experiences after the journey and will further gain importance with younger, tech savvy travellers continuously increasing their market share. The following graphic illustrates a typical customer journey of a millennial traveller and shows which technologies are key at which step:



Figure 3: Various touchpoint between tourism business and customers along the customer journey (CBI, 2019)

Technology is further influencing the following trends:

- Much more direct interactions between service providers and customers
- Much more complexity in terms of distribution channels (see Figure 2)
- A tendency towards more modular travel with flights being booked in advance, while local experiences are often booked much more instantaneously
- An increase in power of consumers with direct customer feedbacks becoming one of the key influencing factors for travel decision making
- Tendencies like FoMo (the 'Fear of Missing Out') and the need to remain constantly connected to what is going on in the world
- Countertendencies like JoMo (the 'Joy of Missing Out') or a rebirth of the high street travel agent, as customers are overwhelmed by the flood of information and ask for tailor-made tours crafted by their trusted agent

Adding the sustainability aspect to this overarching tech trend implies that customers have various means of looking for and verifying information about your sustainability commitment. What is key that businesses are able to provide honest, transparent and ideally verifiable information without trying to 'green- or sustainability-wash' their work allowing customers to make informed choices.

- **Experiences, not things:** A continuous trend since several years is the fact that travel is mainly about experiences. The top 5 experiences trending for 2019, according to Trekksoft (2019) are:
 1. Unique and once in a lifetime experiences,
 2. Ecological tours
 3. Local experiences
 4. More adventure
 5. History and culture

Destinations which manage to spin their offer around nature, culture, adventure and uniqueness have therefore all the right ingredients to make use of the current market trends.

- **Sustainability is increasingly becoming mainstream:** Influenced by above mentioned trends, the urge to travel more sustainably is becoming a mainstream phenomenon, although sustainability in travel continues to mean many different things to different people. The following are selected statistics from representative surveys which underline the ever-growing importance of sustainability in tourism:

- In 2017, 10% of European travellers considered themselves as booking ethical holidays, with French and German tourists taking the lead (Global Sustainability Survey, TUI, 2017).
- Over half (55%) of global travelers report being more determined to make sustainable travel choices in 2019 than they were a year ago, but barriers include a lack of knowledge and available or appealing options when trying to put this into practice. (Sustainable Travel Report, Booking.com, 2019).
- Almost 70% of European travellers believe that the responsibility for more sustainable travel lies primarily with tour operators and experience providers (Global Sustainability Survey, TUI, 2017).
- Almost half (46%) of global travelers acknowledge that they find it harder to make sustainable choices while on vacation than in everyday life. Almost a third (31%) of global travelers admit their vacation is a special time during which they do not want to think about sustainability (Sustainable Travel Report, Booking.com, 2019).
- Millennials, the fastest growing consumer segment of the industry, are looking for transformational experiences over accumulation of things. They are active, adventurous, connected and socially conscious and want to engage with places they care about; they want to give back (Sustainable Travel International, 2017).

At the same time, it is important to understand that sustainability is hardly ever the major reason for travellers to choose a destination or product. Health and safety, accessibility and the quality of the experience still remain key drivers for decision making of tourists and sustainability alone without meeting these more basic concerns of tourists is not likely to be successful (see Figure 4).



Figure 4: Pyramid of Basic Needs of Tourists (Janer, 2011)

- **Sustainability certification is increasingly becoming industry standard in Europe:** While it appears difficult to maintain the overview amongst more than 150 sustainability labels and certification schemes related to tourism, there is a clear tendency amongst European tour operators to select suppliers based on sustainability certification, in particular so in the UK and Germany (CBI, 2017). For example, the large tour operator TUI has a Sustainability Strategy which states that by 2020 TUI accommodation partner must have obtained GSTC-acknowledged sustainability certification. Interestingly, the tendency to get sustainability certification as tour operators, seems to be stronger established in Germany and Switzerland, whilst the British and French operators seem to rely on own initiatives, projects and policies.
- **Changing booking behaviour:** There is increasing evidence that booking behaviour is changing towards more modular travelling with a delegation of researching, planning and booking of unique experiences

to third parties. This manifests itself by a re-birth of travel organisations, local tourist offices and marketplace-bookings through OTAs (see also CBI study on opportunities and threats on the European market, 2019).

- **Regulatory environment for travel from Europe becoming more demanding:** In July 2018, the European Package Travel Directive came into force with the main aim to protect European travellers when booking travel packages. In essence, it redefines what is considered as a package to comprise almost anything which combines two different kinds of travel, such as for instance transport of passengers and accommodation. The main consequence of this is that European tour operators will put higher demands on suppliers in destination countries and will require for instance liability and insolvency insurance from suppliers (see also CBI study on the European Package Travel Directive, 2018).
- **New segments, new markets:** with sustainability going increasingly mainstream, there is not one specific segment you must appeal to, as there are opportunities in most tourism segments. Also, there are a range of different ways to segment clients, depending for instance on countries of origin, demographics, motivation or lifestyle. How one segments its customers depends very much on individual businesses choice, which is why it is refrained from presenting a specific segmentation here but focus on selected trends throughout all categories. Here are some key trends:
 - a. **Generation X** (8 years to 24 years) and **Generation Y** (24 years to 39 years, also called Millennials) will make up 50% of all travellers in 2025: while both these groups are different, they are keen on personalised travel, will appreciate a clear online and social media presence throughout the different stages of the customer journey, can be influenced by bloggers and vloggers, are keen to travel responsibly and authentically and want to understand what destinations and businesses do about sustainability.
 - b. **Lifestyle of Health and Sustainability (LOHAS):** This group of people – many of them Gen x, Gen y and Baby Boomers - care about themselves, other people and the planet, have higher incomes, are highly educated and want to enjoy while feeling good about it. The global size of this group is over 100 million people, while in Western Europe 20% of all people belong to this group. Authenticity and sustainability are top concerns for this group, and they are willing to pay for it. They expect high quality, honest information, online and offline (e.g. from staff members) ...greenwashing is an absolute No-Go for this group.
 - c. **Above 50s:** with people living longer and being healthier in older age, this age group tends to travel much more, has become more adventurous, with sufficient time and money at their hands. This creates in particular opportunities for the nature, culture and soft adventure segments. Important is to fully understand the higher needs for safety and comfort, as well as a different, less online-savvy behaviour of this group.
 - d. **Multi-generational travel:** A combination of the above which is showing strong growth prospects is multi-generational travel, including kids, parents and grandparents or extended families travelling together. To cater to this segment destinations need to be able to offer larger and comfortable accommodation, diverse activities catering to all family members individually, but also activities which can be enjoyed as a group.

2.1 Trends and opportunities for nature tourism⁵

Nature tourism refers to tourism which is directly related to experiences in nature, flora and fauna and people living in natural environments. It often entails active tourism and soft adventure, as well as community-based tourism experiences. It accounts for about 20% of international travel and has a particularly strong following in Europe. There are various traveller profiles, most of them being well-educated, well-travelled and from higher socio-economic backgrounds. Specifically, there are:

- Older tourists, between 50 – 70 years old, keen on higher levels of comfort and with more time at hand. They often book via specialised tour operators and are less mobile phone savvy.
- Younger people, immersed in busy professional lives, with higher budgets, but rather time poor. They are looking for once-in-lifetime, authentic experiences and either book via specialised tour operators or directly online.
- Younger people with lower budgets and more time at hand (e.g. backpackers), keen in authentic experiences and often ready to do some voluntary work related to their nature tourism experience. They almost exclusively book independently.
- Families with children, often interested in both natural and cultural immersion, including elements of adventure and fun, but with higher demands for safety. They often book through specialised tour operators and are more tied to school holidays.

In general, all nature tourists are keen on sustainability issues and would like to understand what service providers do to protect nature and wildlife and give back to local communities. Health and safety concerns are crucial for this group and it is important that service providers pro-actively communicate about their safety engagement and adhere to voluntary safety standards. In particular for Colombia, it is crucial to be able to show the safety of the product and destination from a political perspective, as many travellers still consider Colombia as a whole as unsafe. It is crucial to look into safety recommendations of the foreign ministries of traveller's home countries, as tour operators and their guests will often not go into areas which are deemed unsafe by their foreign ministries.

To promote products and services to nature tourists, it is crucial to have a strong online presence with clear and transparent communication about sustainability commitment. There are specialised portals, such as for instance the European Ecotourism Club (<https://ecoclub.com/>) through which nature products can be promoted. Besides that, and as indicated above, working with specialised, smaller European tour operators or operators specialised in your specific destination, offers great opportunities. You can identify them through your own local DMOs, European trade associations, events and specialised data bases (see Chapter 4 and Annex 1). It is also important to be aware, that many nature tourists have done and seen many things already and they are not interested to see 'yet another waterfall'. It is crucial that destinations and businesses are able to show the uniqueness of the experience on offer. This uniqueness does not necessarily have to lie in the natural assets only, but it could very well lie in the combination of a natural asset with cultural, adventure or other tourism experiences (e.g. a day trip away from a beach holiday).

⁵ Most information in this chapter is summarised from a separate market study done by CBI. For more information access: <https://www.cbi.eu/market-information/tourism/nature-tourism/nature-eco-tourism-europe/>

A great niche with particular potential for Colombia is bird watching. A dedicated market assessment for this segment can be accessed via: <https://www.cbi.eu/market-information/tourism/birdwatching-tourism/>.

2.2 Trends and opportunities for culture tourism⁶

At the heart of cultural tourism is the experience of local arts, cultural heritage, landscapes, traditions and lifestyles. It comprises a broad range of segments from rural tourism and community-based tourism to city breaks and culinary trips and is again highly popular amongst European tourists. In terms of traveller profiles, characteristics are similar to the nature tourists, including higher educational background, well-travelled and higher economic background. There are tourists which travel only or mainly for culture reasons and others who are interested in culture, but do not have it as their main motivation. The following segments are specifically interesting:

- Older tourists, between 50 – 70 years old, more demanding in terms of comfort and with more time at hand. Many people in this group have culture as their main travel motivation, often travel in groups and are keen in high quality information and experiences.
- The young and hip, often single and earlier in their career, are keen to experience culture as an add on of a trip with other elements, such as for instance a sun and beach holiday. This group can best be reached through flexible offers booked in the destination itself.
- Middle aged travellers, further advanced in their career with more disposable income often belong to a group which mainly travels for culture reasons. Again, this group is demanding, either travels independently or in specialised and organised groups
- Families with children are keen to experience culture, whereas it is hardly ever the only reason to travel. A combination of beach, culture, nature and adventure is often well sought after by this group, ideally if it can be done from within the same destination.

Important for culture tourists is the authenticity of the experience (e.g. interactions with locals), both political and physical safety, as well as flexibility of offerings, while sustainability issues are slightly less important compared to nature tourists. Cultural heritage and historic sites are key attractors for this group and specialised study tours are showing a growth trend (see for instance European market leader www.studiosus.com).

Promotion and sales are best done through a combination of direct sales and specialised tour operators, depending on the specific target group to be attracted. For the former, platforms like www.gonomad.com, www.theculturetrip.com or www.wanderlust.co.uk offer great opportunities, while tour operators for the later can be identified as explained in Chapter 4 and Annex 1.

An interesting niche combining both culture and nature tourism which has particular potential for long-haul destinations from Europe with a strong community and cultural heritage is community-based tourism. A detailed assessment of this segment can be found here: <https://www.cbi.eu/market-information/tourism/community-based-tourism/community-based-tourism-europe/>.

⁶ Most information in this chapter is summarised from a separate market study done by CBI. For more information access: <https://www.cbi.eu/market-information/tourism/cultural-tourism/cultural-tourism-europe/>

2.3 Trends and opportunities for adventure tourism⁷

An element of adventure forms part of the majority of trips of European travellers. ATTA defines adventure travel as “trips that provide experiences (both mental and physical) to places that are novel or unique to the traveller, emphasise the natural environment, and provide challenge through experiences of culture, activities that promote physical health, and excitement/fun”. The main differentiation within the segment is made between soft and hard adventure, the latter referring to activities which imply a higher level of fitness, skills and risk (e.g. kitesurfing, caving). The ATTA estimates the international adventure travel market can be valued conservatively at €580 billion in 2017, with an average annual growth rate of 21% since 2012. Adventure tourists can be found amongst all age groups with a particular growth amongst older travellers for soft adventure holidays.

Crucial for a focus on adventure tourism are safety concerns, in particular physical safety standards, but also overall political safety of an area. Adventure tourists are often keen on flexible travel options which can be booked for instance in the destination itself in combination to nature and culture experiences or on adventure experiences which can be combined with wellness and transformative experiences. Sustainability concerns rank high amongst adventure tourists and travellers are keen to understand in what way they are contributing to the protection of the environment and supporting local communities. An important measure to track for European tour operators in the adventure tourism segment is the Adventure Tourism Development Index (ATDI), which assesses a country’s potential for adventure tourism based on ten criteria, including sustainable development, health, safety, natural and cultural resources, tourism infrastructure and others. Colombia currently ranks in the middle tier at rank 58 of a total of 163 countries (ADTI 2018) – top tier regional competitors are for instance Brazil, Chile and Peru -, but shows strong improvements from year to year. Main challenges for Colombia relate to health and safety measures.

For the promotion of adventure tourism, a strong online presence is key. Specialised sites, such as for instance <http://reviewing.co.uk/outdoors/links.htm> are great channels to place products and services on the adventure market. On the other hand, adventure travellers are more likely to use professional, often certified services, as health and safety concerns are of high importance. Tour operators remain therefore the main trade channel. The ATTA, the Adventure Travel Show (<https://www.adventureshow.com/>) and the Adventure Travel World Summit (<https://www.adventuretravel.biz/events/summit/>) are great platforms to find specialised tour operators tailored to your offer.

⁷ Most information in this chapter is summarised from a separate market study done by CBI. For more information access: <https://www.cbi.eu/market-information/tourism/adventure-tourism/adventure-tourism-europe/>

3. Colombia’s Tourism Offer: A Snapshot

Colombia’s tourism sector has experienced an impressive transformation from 1 million international arrivals in 2006 to almost 4 million in 2017 (UNWTO, 2018) and a growth of 9.4% between 2017 and 2018⁸. Its total contribution to GDP and to employment stands at 5.8% in 2017 (WTTC, 2019) and it has become the third most important GDP contributor after financial services and manufacturing with further growth prospects for the years to come. While this growth is certainly very welcome in a country which has struggled for decades to attract tourist partly due to its violent past, it poses risks to the sustainability of tourism and in particular to communities and the environment.

More than 80% of tourists travel for leisure to Colombia, with the US and other Latin American countries topping the list of source countries. In terms of Europe, Spain, France, Germany and the UK top the international arrivals (MinCIT, 2019) with strong double-digit growth from Spain, Germany and the UK. In particular Germany, UK and France belong to the main focus markets for the Colombian government for nature and culture tourism, as identified in the country’s business plan for nature tourism (2013).

Estrategia y Priorización de Mercados

Prioridad	Estado Actual	Mercados Clave	Estrategia de crecimiento
Estable	Crecimiento Estabilizado	USA España	Mayor penetración con nichos especializados
Estrella	Mercados Estrella	Brasil Argentina	Reforzar y aumentar promoción
Expansión	Oportunidad	Reino Unido Chile Alemania Australia	Desarrollo de mercado
Nuevo	Introducción al mercado	Italia Canadá Francia	Dar a conocer

Figure 5: Market Prioritization for Nature Tourism (Government of Colombia, 2013)

3.1 SWOT for Colombia and Sustainable Tourism

Colombia’s main strength lies undoubtedly in the **diversity of its offer**: from culture highlights, including 7 UNESCO World Heritage Sites, ancient cultures and traditions to contemporary food, music and dance culture to a great variety of natural assets, ranging from magnificent beaches, deserts to rainforests and high mountain ranges, **Colombia has everything**. It is in particular gaining a strong reputation as one of the most biodiverse countries in the world with huge potential for bird watching. At the same time, it is developing a reputation for a great place in the adventure space with cycling tourism, trekking, diving and

⁸ The statistics are nevertheless slightly misleading, as a significant part of the growth in international arrivals is made up of cruise ship tourism, not adding much value per tourist per day to the country, while having considerably negative social and environmental impacts.

surfing gaining in importance. It is further still perceived as more exotic and undiscovered compared to its South American peers, which can be used as great advantage for further promotion of authentic and unique experiences. In the words of a UK tour operator: *‘Colombia doesn’t usually first spring to mind when thinking of a holiday in Latin America but forget what you think you know and be prepared to be amazed.’*



Figure 6: Colombia’s strengths in terms of tourism attributes (Colombian Tourism Strategy, 2011)

According to the WTTC 2019 report, it is in the **nature and culture space, where Colombia is currently most competitive**. In particular, the possibility to combine nature and culture tourism with a variety of other tourism segments, such as for instance business tourism, cruise tourism, etc. may give it a competitive edge compared to other competitors within the region.



Figure 7: Travel and Tourism Competitiveness in Latin American Comparison (WTTC, 2019)

On the weakness side, a non-enabling business environment in combination with concerns for safety and security are amongst the factors which curb investment and growth of the tourism sector (WTTC, 2019). On the positive side, sustainable tourism is a topic in Colombia and the government has established its own sustainable tourism certification programme for both tourism businesses and destinations. It remains, though, a niche or side topic, which has yet to find its way into the mainstream of tourism. The prioritization of travel and tourism within the national agenda remains below a South American average, as Figure 7 above illustrates.

Strengths	Weaknesses
<ul style="list-style-type: none"> - Diversity of the offer: culture, nature, adventure, beach, cities, events, cruises - World class reputation for its biodiversity (1st country in the world in biodiversity per km²) - Good accessibility, to Colombia and to sub-national destinations - Good infrastructure in main tourism hubs - Still a rather new country destination → exotic factor - Existing government programme for sustainable tourism destination/businesses, including certification - Tourism numbers are already there in main hubs → spread the numbers - Selected strong private sector actors which can support the advancement of the industry - Strong human capacity in terms of sustainable tourism within country 	<ul style="list-style-type: none"> - Security reputation: many do not consider Colombia as safe and many foreign ministries have very conservative travel warnings for many areas in Colombia - Infrastructure rather weak, mainly in rural areas - Lack of English language skills - Shortage of formal and specialized tourism guides - No clear high-level commitment to sustainability as part of the mainstream - Limited institutional capacity for destination development and management, in particular at sub-national level - Many regions try to focus on similar niche offers, such as for instance 'bird watching' - Limited coordination and longer-term strategic planning between key actors - Multi-country travel over land not considered safe (border with Venezuela and Ecuador) - Health and safety concerns, in particular related to adventure tourism
Opportunities	Threats
<ul style="list-style-type: none"> - Position Colombia much stronger as an emerging, sustainable destination through its strong nature and culture assets, in collaboration with key strategic partners (e.g. GSTC, ATTA, World Tourism Organization UNWTO) - ACOTUR: association dedicated specifically to the cause of responsible tourism can advocate for the importance of the topic 	<ul style="list-style-type: none"> - Collapse of the peace process may lead to a strong reduction in international arrivals and domestic travel - ACOTUR: 'outsourcing' of sustainable tourism to ACOTUR may lead to a lack of integration of the topic into the mainstream - Politicization of tourism and focus on international arrival numbers, rather than clear commitment towards local value addition

Figure 8: Colombia's SWOT in terms of sustainable tourism (Source: Author)

3.2 Regional Competition in terms of Sustainable Tourism

There are several global surveys and studies on the most sustainable country destinations. While all of these surveys can give valuable insights on what makes a country more sustainable compared to a peer according to the criteria and methodology used for the specific survey, it is most insightful to look at the

perception in the target market. SIPPO Peru has carried out a survey⁹ assessing the regional competition of Peru in terms of sustainable tourism and has asked 20 Swiss, German and French tour operators about the perception of their customers in terms of what they consider to be the most sustainable tourism destinations a.) in the world and b.) within Latin America. The two graphics below illustrate these results, while the following findings are interesting for Colombia:

- Latin America has a strong reputation globally for sustainable tourism destinations, much more so than other regions¹⁰
- Sustainability is more strongly associated with environmental, rather than cultural issues, which is why destinations with a particularly strong environmental performance (e.g. Costa Rica) are perceived as more sustainable
- The number one global reference destination in terms of sustainable tourism is Costa Rica
- Colombia does not yet have a strong image in terms of sustainable tourism compared to its regional competitors. This may be correlated to the fact that Colombia is in general less well known as a tourist destination.



⁹ [Reference to survey document](#)

¹⁰ There may be a certain bias towards Latin America due to the fact that all consulted tour operators have a strong Latin American portfolio.

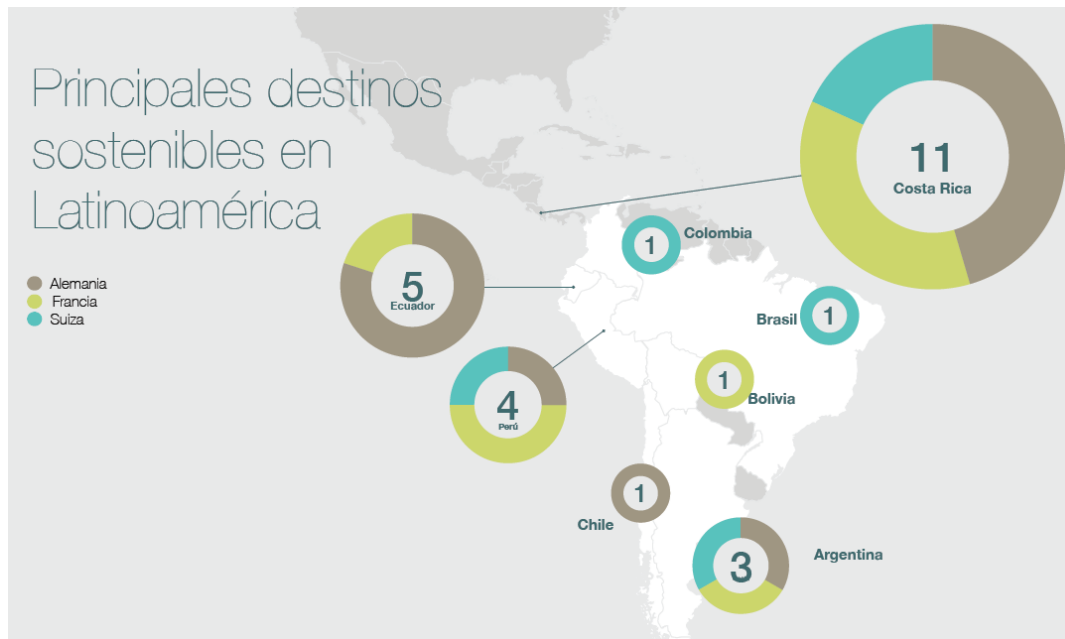


Figure 9: Perception about Sustainable Tourism Destinations globally and in Latin America (Source: SIPPO Peru, 2019)

While the market may not yet fully recognise Colombia's potential for sustainable tourism, Figure 7 above illustrates that Colombia has all the right ingredients to further strengthen its image: it is above average competitive in terms of its cultural and natural assets and ranks top in terms of environmental sustainability, international openness and price competitiveness in a South American comparison.

It is also important to be aware of the fact that sustainable tourism promotion does not mainly happen at national level. In fact, more often than not, it is sub-national destinations which manage to establish a strong reputation in terms of sustainability (e.g. Galapagos Islands in Ecuador, la Macarena in Colombia, the historic centre of Cartagena in Colombia), which is also the reason why the majority of certification schemes for destinations focus on this level.

In summary: Colombia is very well positioned to establish a much stronger reputation as a country committed to sustainable tourism. The diversity of its offer allows for a range of creative options of combining different market segments with more sustainable tourism, rather than trying to build up sustainable tourism as a niche segment only. In order to do so, it needs to maintain its core markets and hubs with high quality services and products but should focus further tourism development and promotion on its nature and culture assets. By strengthening specific niches like birdwatching, community-based tourism or cycling the overall sustainable tourism image can further be boosted. A stronger national, high level commitment towards the mainstreaming of sustainable tourism, reflected in key policies and strategies will be important to carry the image of a sustainable destination towards the rest of the world and to provide incentives and leadership for the local tourism industry. A well targeted marketing and promotion strategy fully integrating sustainability as core principle will be important to make full use of the inherent potential of the country and bring together the already existing, valuable initiatives aiming to make tourism more sustainable (e.g. sustainable tourism certification programme of the government, blue flag certification, specialised association focussed on responsible tourism). Further

investments into infrastructure development, a more enabling business environment and a better safety and security reputation will be crucial to attract further investment into the sector, in particular also for adventure tourism, for which Colombia has great potential. The key to success will be to mainstream sustainable tourism into all aspects of tourism promotion, invest in education and product quality and talk about it, inside Colombia and beyond.

4. Key players in Europe for the promotion of sustainable tourism to Colombia

Awareness for sustainable tourism has been constantly rising in Europe, both amongst customers and industry stakeholders alike. Almost all tour operators from small to large will have something to say about their sustainability commitment and many of them have internalised these commitments into their way of doing business. Identifying key players to collaborate with for Colombian service providers and their BSOs will depend very much on the products and experiences one has to offer and the target markets one wants to focus on. If one offers eco-lodges, for instance, tour operators specialising on eco-tourism are likely to be most suitable.

This chapter will shortly introduce the European key actors, including trade associations, sustainable tourism networks, certification bodies and key trade fairs in order to guide readers towards where best to search for potential partners suitable for their specific offer. Annex 1 will present a list of selected tour operators, which may be in particular interesting for Colombian suppliers interested in offering nature, culture and adventure products and services. Chapter 5 is outlining a process on how to best match a specific Colombian offer with European demand from tour operators

4.1 Trade Associations

There are a range of important trade associations in Europe and in the respective target markets subject of this market scan.

The European Travel Agents' and Tour Operators' Association (ECTAA)

ECTAA is the Group of national travel agents' and tour operators' associations within the EU. It actively cooperates with European Union institutions and international organizations to ensure that their interests and special requirements are taken into consideration. ECTAA now represents the national associations of travel agents and tour operators of 27 EU Member States, as well Switzerland and Norway, and 4 international Members. More information can be accessed via: www.ectaa.org.

Switzerland: Schweizer Reise-Verband (SRV)

The SRV is the main Swiss association for the travel and tourism industry, comprising almost 700 tour operators and travel agencies in Switzerland and neighboring Liechtenstein. It represents the interests of its members on a national and international level and can be found via: www.srv.ch (only in French and German). Most qualified tour operators will be members of the SRV.

Germany: Deutscher Reise-Verband (DRV)

The German Travel Association (DRV) is the main German association for the travel and tourism industry, comprising the majority of tour operators and travel agencies in Germany. Similar to its Swiss peer association, it represents the interests of the German travel industry and engages as a whole for more sustainability in travel. Its main webpage can be accessed via: www.driv.de (German only).

France: Les Entreprises du Voyage (EDV)

In France, the main industry representation body is called Les Entreprises du Voyage and comprises more than 1600 members. More information is available on: <https://www.entreprisesduvoyage.org> (French only) and most tour operators will again be members of EDV.

United Kingdom:

The UK has two major associations and many tour operators are members in both.

a. ABTA, the Travel Association (ABTA)

With more than 4300 members, ABTA (see www.abta.com) is the UK's biggest industry representation body working on industry standards and sustainability issues, providing financial protection schemes and lobbying industry interests towards the government.

b. AITO, the Specialist Travel Association

AITO (see www.aito.com) is the other larger British-based travel industry trade group representing around 120 specialist and independent tour operators. To become a member, AITO tour operators must have full consumer protection in place. Through this requirement, its quality charter and promotion of sustainable tourism initiatives, AITO upholds high standards within the travel industry. Many of the smaller tour operators which may be interesting for Colombian businesses are likely to be members of AITO.

Global: The Adventure Travel Trade Association (ATTA)

The ATTA is a privately held, for-profit industry trade group that serves to network, educate, professionalize and promote the adventure travel industry. It has a very strong sustainable tourism ethos and is one of the key actors in this field. Its current membership comprises more than 1300 members representing more than 100 countries worldwide, including many tour operators in Europe. ATTA offers advisory and consultancy services to tourism boards, BSOs and individual members and is highly experienced in supporting market access interventions. More information about ATTA can be found here: www.adventuretravel.biz

4.2 Sustainable Tourism Networks, Organisations and Platforms

There are a wide range of networks, organizations and sites which are making sustainability in tourism as one of their main objectives. This chapter refers only to a selection of them and excludes for instance major players like UNWTO, which have a much broader mandate, but are obviously strongly committed to sustainable tourism. Also - despite their increasing importance when reaching out to European travelers - bloggers are not part of this chapter, as this would go beyond the scope of this market scan.

The International Ecotourism Society (TIES)

TIES (<https://ecotourism.org/>) is an international non-profit organization focusing on the promotion and awareness creation around eco-tourism and sustainable tourism. It has more than 15'000 individual and organizational members in more than 190 countries and is an excellent platform for positioning products, getting visibility and networking activities.

The Travel Foundation (TF)

TF is a UK charity working together with businesses and government to promote more sustainability in tourism. It offers training, stakeholder engagement, market research, project design and advisory services and has an excellent network not only into the British, but also the global tourism sector. It is a great

resource for information, expertise and connections to the European market and can be accessed through: www.thetravelfoundation.org.uk/

Forum Anders Reisen (FAR)

FAR is a Germany-based not for profit network which brings together more than 100 German, Swiss and Austrian tour operators. The main commonality is a strong commitment to sustainable tourism and most members are at the same time certified by a GSTC accredited certification body, such as TourCert. Through its webpage www.forumandersreisen.de (German only) tour operators which offer Latin America and Colombia can be found and contacted for the promotion of specific products and services. Many of the tour operators with potential as partners for Colombian businesses will be members of FAR.

Swiss Working Group on Tourism and Development (AKTE)

AKTE is a non-profit organization concerned with the social, cultural, economic and ecological impacts of tourism on development. It aims to promote the cause of the disadvantaged population in tourist destinations by raising public awareness, by advocating fair trade in tourism in a critical dialogue with the travel industry, and by encouraging travelers to be informed consumers. It is an interesting resource hub and place for showcasing interesting experiences in sustainable travel and tourism (see also: www.fairunterwegs.org).

German Institute for Tourism and Development (Studienkreis)

The Institute for Tourism and Development is the German equivalent of AKTE and is registered as a non-profit organization. Its website www.studienkreis.org boasts a broad range of information on sustainable tourism and it allows to showcase destinations and products with a special commitment to sustainable tourism.

Agir Pour un Tourisme Responsable (ATR)

ATR is an association of French tour operators strongly committed to sustainable and responsible travel. It has its own certification scheme called ATR. It has around 40 members, mainly from the adventure and nature segment, which are ATR certified and actively promote sustainability in the French tourism industry. It is a good source of information to find French Tour Operators interested in Latin America, Colombia and Sustainable Tourism: www.tourisme-responsable.org

Centre for the Promotion of Imports from Developing Countries (CBI)

CBI is part of a Dutch Government Agency and mainly funded by the Dutch Ministry of Foreign Affairs. CBI is probably the best source for any information related to (sustainable) tourism and import promotion into Europe and has a broad range of studies available on its webpage: www.cbi.eu

The Green Global Travel

The Green Global Travel is a website (<https://greenglobaltravel.com>) with more than 300'000 followers focusing on sustainable travel blogging. It is a great source of information and an excellent way to promote destinations and products.

Online Travel Agencies (OTAs)

OTAs are not Europe-specific, but certainly belong to the major players influencing the European tourism market. The likes of Booking, Expedia, Agoda and Tripadvisor have their specialised programmes to showcase their own sustainability initiatives, but also allowing you to profile your work in the area of

sustainable tourism. It is worth reviewing the TripAdvisor Green Leaders programme (www.tripadvisor.co.uk/GreenLeaders), the Booking Cares (<https://bookingcares.com/>) and the Expedia Cares (www.expediacares.com) websites for this purpose.

4.3 Certification Bodies¹¹

The use of certification and labels in tourism has received continuous attention over the past decade. For some operators, in particular on the Western European market (e.g. TUI), a sustainability certificate has almost become a pre-condition for collaboration with service providers. Being certified can therefore be useful to get into the portfolio of Europe based tour operators. At the same time, a proliferation of new programmes and certification bodies – there are currently more than 150 labels in use globally - has made it difficult for consumers to understand the importance of specific labels and the processes behind certification. It is therefore fair to say that certification has probably limited strength from a B2C marketing perspective. But the decision to go for any specific certification should also not be predominantly driven by a marketing and sales logic, but by an overall conviction that it will improve overall business management in the medium and longer-term.

The main labels, accreditation and certification bodies which cover all sustainability aspects, are most relevant for the European market, have an international scope and are GSTC approved or recognized are presented in the following section:

The Global Sustainable Tourism Council (GSTC)

The GSTC (www.gstcouncil.org) is not a certification body itself, but the global accreditation organisation for sustainable tourism certification. It manages quality standards in sustainable tourism certification and has a crucial role in global awareness creation on sustainable tourism. It sets the global sustainable tourism criteria which serve as guidance for all certification bodies and labels. A sustainable tourism certification body can either get GSTC approved, meaning that its criteria and the process for applying the criteria have been accredited by GSTC or they can get GSTC recognized only, which means that the criteria are aligned to the GSTC criteria without GSTC being having gone through an accreditation process.

Biosphere Responsible Tourism

The Biosphere Sustainable Tourism label (www.biospheretourism.com) certifies tourism businesses and destinations. It has more than 100 businesses certified and an international reach, including Germany, UK and several South American countries. It is both GSTC recognized and approved. Biosphere has its own representation office in Colombia, although here are not yet many businesses or destinations certified in the country.

Earth Check

Earthcheck (www.earthcheck.org) certifies both tourism businesses and destinations taking a holistic approach to sustainability. It has an international scope and more than 1200 businesses certified all over the globe and is GSTC recognised. It has a limited presence in Colombia for the time being.

¹¹ Much of the information for this chapter stems from: https://www.fairunterwegs.org/fileadmin/user_upload/Dokumente/PDF/Dokumente_intern/PDF-Labelguide_Dritte_Auflage_DE_2016.pdf

Green Globe

The Green Globe certification (www.greenglobe.com) is a structured assessment of the sustainability performance of travel and tourism businesses and their supply chain partners. Businesses can monitor improvements and document achievements leading to certification of their enterprises' sustainable operation and management. It has a global reach with more than 600 businesses certified till date and is GSTC recognized. For the time being it has limited spread throughout Colombia.

Travelife

The Travelife (www.travelife.org) label uses different standards and verification procedures for accommodation and tour operators. Travelife for hotels and accommodations is managed by AVBTA, while Travelife for tour operators and travel agencies is run by ECEAT. It has a global reach with over 700 hotels and 220 tour operators certified. Travelife is GSTC recognised and has a certain recognition throughout Colombia.

TourCert

The TourCert label (www.tourcert.org) is awarded to tour operators, travel agencies, accommodations and destinations as a whole. It has a strong representation in Germany, Switzerland and Latin America with more than 100 businesses and destinations certified till date. It is also GSTC recognized and has quite some recognition throughout Colombia and Latin America with own offices in Ecuador and Peru.

4.4 Key Trade Fairs

The list of tourism trade fairs is long and the right choice of trade fair very much depends on your product and target market. In this chapter, we are specifically referring to trade fairs, which have a strong following and presence in the area of sustainable tourism.

ITB Berlin

The largest global tourism fair (www.itb-berlin.com) taking place every year in March is almost a must for anybody wanting to promote its products and destinations in the European market. ITB has a special conference programme focusing on CSR and responsible tourism and brings together many exhibitors and buyers with a strong focus on sustainable tourism.

WTM London

The second largest global fair (www.london.wtm.com) also has sustainable tourism as a key topic in its conference programme and brings together all key industry players each November in London. It has a Latin American chapter taking place each year end of March/early April.

Adventure travel trade fairs

ATTA organizes a range of adventure focused industry events (www.adventuretravel.biz/events), amongst others the Adventure World Summit, the Adventure Next and the Adventure Connect Events. Destinations can apply to co-host these events to position themselves within the adventure tourism space. There is also the Adventure Travel Show (www.adventureshow.com) taking place each January in London which is a consumer trade show offering a live sales and marketing platform to the industry.

Specific niche market fairs in the adventure space with potential for Colombia could be:

- **The Annual Bird Fair:** this is the main global birdwatching tourism fair taking place each year in August in the UK (www.birdfair.org.uk)
- **The Annual Bike Fair:** Eurobike takes place each September in Germany (<https://www.eurobike.com/en/>) and is the go to event for anybody interested in cycling tourism. Both WTM and ITB also host special events for cycling tourism.
- **Tour Natur:** Düsseldorf in Germany hosts each year in September a trademark travel trade fair (www.tournatur.com) focusing on outdoor tourism, namely trekking, hiking, climbing and cycling.

Solidarissimo: Solidarissimo is a specialized sustainable tourism sub-fair organized as part of the Salon International Du Tourisme et des Voyages (www.sitvcolmar.com) in Eastern France’s Kolmar each November. It is organized by socially responsible tourism experts and has over 60 specialist exhibitors. Similarly, Fair Handeln, organized annually in April in Stuttgart (Germany) is a trade fair focusing on the topic of fair trade. Sustainable tourism forms an important part of the fair and selected exhibitors – selected based on TourCert criteria compliance -, get an excellent platform to position themselves to industry and customers alike.

The following table illustrates the trade fairs which are most interesting for tour operators from the four target markets and related to sustainable tourism and the core aspects assessed as part of this study.

Tade Fair	Sustainable Tourism	Nature	Culture	Adventure	Switzerland	Germany	France	UK
ITB (Berlin)	***	***	***	**	***	***	**	**
WTM (London)	***	***	***	**	**	**	**	***
WTM Latin America (Sao Paolo)	***	***	***	**	**	**	**	**
ATTA trade fairs (various)	**	**	*	***	**	**	*	**
Adventure Travel Show (London)	**	**	*	***				***
IFTM Top Resa (Paris)	**	***	***	**	*		***	
B-Travel (Barcelona)	**	**	***	**	*	*	*	*
Annual Bird Fair (UK)	**	***		**	*	*	*	***
Annual Bike Fair (Germany)	**	***	*	**	**	***	*	*
Tour Natur Nature Fair (Germany)	***	***	*	*	**	***	*	*
Solidarissimo (France)	***	***	***	**	**	*	***	
Fair Handeln (Germany)	***	**	***	**	**	***	*	*

Figure 10: Main Tourism Fairs in Europe for Nature, Culture, Adventure and Sustainability in Tourism (Source: Author)

5. Linking Demand and Supply for Sustainable Tourism in Colombia

This chapter proposes a process on how Colombia's offer in terms of sustainable tourism can be better linked with the demand from Germany, France, Switzerland and the UK. The focus is not on specific products and destinations within Colombia, but rather on a generic process, which BSOs and their members can tailor to their own needs. It also important to reiterate, that:

- While international tourism can certainly offer interesting opportunities to promote sustainable tourism, the **importance of domestic and regional tourism** should not be underestimated, as this is where lower entry barriers can be found, more cost-effective promotion can be done, seasonality issues can be better bridged and the overall sustainability performance can be improved, as international travel is minimised.
- There are multiple ways of linking demand and supply and it is paramount, that BSOs and businesses run **multiple strategies** catering to the needs of different target segments. In general, this includes at least:
 1. a strong online and social media presence and strategy (direct sales, returning customers, niche segments);
 2. work through OTAs (indirect sales);
 3. working through tour operators (indirect sales).

The process described hereafter is mainly focussing on the third channel mentioned above of selling through European tour operators. This channel again is most relevant for medium-sized and larger tour operators and DMCs, whereas smaller operators are often best off by focusing on selling through national level DMCs. Annex 2 further illustrates a variety of distribution channels and their potential in supporting the promotion of sustainable tourism products.

- **Step 1: Understand your destination and its diverse visitor flows:** One of the first steps necessary and unfortunately all too often a step which is not given the appropriate priority level, is an appropriate understanding of the visitors which are already in the destination or in nearby destinations. Only by fully understanding what motivates visitors to come, how they behave along the customer journey and what they do in the destination, it will be possible to drive product development and promotion in a targeted manner. This step will also help to identify one's unique selling point and bring clarity to where one stands compared to competitors. It will further illustrate, which segments may have further development potential.
- **Step 2: Understand trends and opportunities in your target markets:** Once you are clear about the visitor flows in your destination and you have decided on your priority markets/segments, assess trends and growth potential for these visitor groups. There are a range of organisations which publish the most recent trends on an annual basis, such as for instance Treksoft, Euromonitor, Booking.com, as well as ITB and WTM. CBI has specific studies analysing trends for a variety of sustainable tourism related segments.
- **Step 3: Identify tour operators which cater to your target market and are on top of the trends:** Through national travel trade associations in Colombia and associations in your source markets (see Chapter 4.1) identify tour operators which offer nature, culture and adventure tourism and which have

Colombia and/or South-America in their portfolio. At the same time, study the trade fairs which cater to nature, culture and adventure tourism and have a strong sustainability reputation (see Chapter 4.4). Establish a long list of tour operators which match with your overall offer. Besides tour operators, there are interesting match making organisations, such as for instance www.responsibletravel.com, which do not run their own tours, but link sustainable suppliers and operators. Colombia, for instance, still remains underrepresented in the portfolio of responsibletravel.com

- **Step 4: Identify those tour operators, which have a strong sustainability commitment:** Through specialised networks (see Chapter 4.2) or certification bodies (see Chapter 4.3) you will be able to find those tour operators, which have a strong sustainability commitment either through memberships in those networks or certification they may have received. Assess costs and benefits for your destination/business to go through a certification process, as this may help to differentiate yourself from your competition and bring you closer to partnerships with European tour operators. Shorten the long list to those which have a strong sustainability commitment.
- **Step 5: Visit the tour operators webpage and study their profile:** Study the tour operator's web presence and assess their fit with your offer. Decide about the best way to contact them. Review as well the buyers list of the main trade fairs, such as ITB and WTM. Also, be aware that tour operators which already have Colombia in their portfolio most likely work with local partner DMCs. Find out what they offer to the tour operator and assess your own profile based on that and whether direct sales to Europe based tour operators is the right strategy for your business. If so, in general, it will be easier to work with smaller, more specialised tour operators, rather than working with larger operators, which mainly compete on price. For the smaller tour operators, it is crucial to establish a strong relationship of trust over time, as well as being able to comply with regulations imposed through the new European Travel Directive (e.g. Liability Insurance).
- **Step 6: Establish contact to best matching tour operators:** Identify the best person to contact within the tour operator identified as suitable for your offer. This is likely going to be the person in charge of your country on the tour operator's side or a dedicated sustainability manager. Contact them by e-mail first in upbeat, high quality language, which is adapted to the profile of the operator. Assess mutual interest, needs and conditions for collaboration and identify potential further meeting opportunities, such as for instance at a trade fair (see Chapter 4.4).
- **Step 7: Develop and curate relationship with tour operators:** Meet in person during a roadshow or a trade show and help to organise a familiarization trip to your own destination. Keep tour operators updated with high quality newsletters and e-mail communication.
- **Step 8: Deliver on your promise and continuously improve:** Once relationships are established and your offer has become part of the portfolio of a tour operator, ensure that you deliver on your promise and improve based on inputs from customers and tour operators.

Annex 1 provides a list of French, German, Swiss and British tour operators which match the general characteristics identified in step 3 and 4 above. This is not an exhaustive list but will offer good entry points for potential new partnerships for Colombian BSOs and their members.

6. Conclusions

The following main conclusions can be derived from this market scan assessing the potential of sustainable tourism in Colombia for the European market.

1. **Global trends:** There is no doubt that tourism will continue to grow for the future to come and, along with it, the pressure on environment and communities. **Sustainability will increasingly become mainstream** and destinations and businesses must embrace sustainability as part of their core strategies, if they want to remain competitive. **Culture, nature and adventure related authentic experiences are trending amongst European travellers** and will do so for the future to come. Technology will stay one of the main disruptors along all aspects of the customer journey...it is paramount to embrace it in all its facets.
2. **Colombia's offer:** Colombia's main strength lies in the **diversity of its offer**, a very strong **competitive edge in terms of natural and cultural assets** and the fact that it is one of the emerging destinations in Latin America. While it currently lacks a stronger national level commitment to sustainability which guides all aspects of travel and tourism in the country, while it lacks certain infrastructure and struggles with a reputation of not being safe for tourism, it has clear potential to develop a much stronger reputation as a more sustainable travel destination. It **needs a high-level commitment** followed by the necessary investments and a strong concerted effort from all industry stakeholders in national and sub-national destinations alike. It will also need to become much better integrated into the overall promotion of the country's tourism brand towards the outside world (e.g. at Trade Fairs).
3. **Key players in Europe:** Key players for work on sustainable tourism in Europe are either national trade associations, specialised tourism networks and organisations, certification bodies, selected trade fairs and a broad range of influencers. ABTA and AITO are the first entry points to the UK market, the **Adventure Travel Trade Association (ATTA)** is the go to organisation for a strengthening of the adventure segment, the **Forum Anders Reisen (FAR)** is likely to be the best contact point to find tour operators with a strong sustainability commitment in the German speaking market and **TourCert, Travelife or Biosphere** are amongst the best recognised certification bodies in Europe and Latin America alike. The **Global Sustainable Tourism Council (GSTC)** is one of the best partners to work with in terms of establishing and strengthening an international sustainable tourism reputation. In terms of trade fairs, ITB in Berlin and WTM in London are among the best platforms to showcase your products to a broader audience of sustainability interested customers.
4. **Linking Demand and Supply:** Aligned to the reality of the complexity of the tourism sector, the key to linking demand and supply for sustainable tourism from Colombia is **diversification of distribution channels**. There is no doubt that a **strong online and social media presence is a must**, working through OTAs can offer great advantages and collaboration with specialised, smaller tour operators can complement a strong portfolio. For the latter in particular, it is paramount to understand the destination and its USP, the present visitor profiles and potential target markets and the demands and needs of potential tour operators (e.g. liability insurance, sustainability certification).

In order to move forward on the recommendations outlined as part of this market scan, it is proposed to follow a two-pronged strategy which can be implemented in parallel:

- a. **'Top-down'**: in order to strengthen the overall focus on sustainable tourism in Colombia, it is paramount that the government takes a stronger high-level commitment, reflected in national policies and strategies. It is not recommended to develop a separate strategy for sustainable tourism but make it a core topic of the overall national strategy. In particular ProColombia and MCIT should take the lead for this and in collaboration with SIPPO and ACOTUR bring other key stakeholders on board. GSTC could be an important strategic partner to allow Colombia access to a more global network and reputation in sustainable tourism. The strategy should work on strengthening the overall sustainable tourism product and destinations, as well as the overall marketing and promotion within the country and beyond.
- b. **'Bottom-up'**: in order to improve market access of Colombia's market ready products in the area of adventure, nature and culture tourism, in particular ACOTUR could take the lead to build the capacity of its members in collaborating with European tour operators (e.g. through trade fairs, buyer missions, fam trips), with OTAs and directly with customers through an improved online presence. SIPPO can support ACOTUR in organisational development and strengthening activities.

Annexures:

- Annex 1: List of SME-sized, selected tour operators (France, Switzerland, Germany, UK) interested in sustainable tourism products and experiences from Colombia
- Annex 2: Different distribution channels and their strengths to promote sustainable tourism

Annex 1: List of selected, SME sized tour operators (France, Switzerland, Germany, UK) interested in sustainable tourism products and experiences from Colombia

Name and contact detail of buyer		Main features of company	Colombian portfolio (Nature, Culture, Adventure)	Sustainability commitment
Switzerland				
1	Dreamtime Travels: www.dreamtime.ch	Swiss based, small specialised tour operator with a global portfolio; mainly German speaking Swiss market	Several trips from 4 – 24 days with different thematic features, such as coffee región, Carribbean, history and including destinations like Medellin, Nuqui, Salamina, Girardot, Bogota, Villa de Leyva, Barichara, Santander, Mompox, Mucura Island, Cartagena	<ul style="list-style-type: none"> • TourCert certified • Has a specialised CSR manager
2	Dorado Latin Tours: www.dorado-latintours.ch	Swiss based, small tour operator specialised in central and south America; mainly German speaking Swiss market	A variety of different group and individual trips from 3 days to longer trips; typical example of a 5 day group our to Nuqui	<ul style="list-style-type: none"> • TourCert certified (sustainability certificate) • Myclimate partner (climate compensation scheme) • The Code supporter (child protection network)
3	Hotelplan Group (Globus Reisen: www.globusreisen.ch , Hotelplan: www.hotelplan.ch , Travelhouse: www.travelhouse.ch)	Large Swiss based tour operator group with several brands; mainly German speaking Swiss market	Only Travelhouse has Colombia in its current portfolio with three thematic trips: Coffee, Colonial History and Llanos Wildlife Safari; most trips are shorter trips up to 4 days; Globus Reisen has the Colombian Caribbean Islands and Carthage as part of its cruise portfolio	<ul style="list-style-type: none"> • Myclimate partner (climate compensation scheme) • The Code supporter (child protection network) • Various other sustainability initiatives, e.g. works with Travelife certified accommodation providers and is member of fairunterwegs.ch
4	Tourisme pour tous: www.tourismepourtous.ch	Part of the Hotelplan group, specialised for the Swiss French speaking market; focus on families, culture and active holidays	Currently offers mainly an 8-day circuit from Bogota – Villa de Leyva – Armenia – Carthage – Bogota focussed on culture and nature	See Hotelplan

5	Baumeler: www.baumeler.ch	Larger Swiss based tour operator with a global portfolio; mainly catering to the Swiss German market with specialization in biking and hiking	Colombia coming into the portfolio in 2020 only; collaboration with 1 Acotur member already established for the local management of the trips	<ul style="list-style-type: none"> • Myclimate partner (climate compensation scheme) • Support to various sustainability projects
6	Globetrotter: www.globetrotter.ch	Larger Swiss based tour operator with a global portfolio; all kinds of specialisations are available	Colombia is part of the current portfolio with bike trips, coffee trips and Caribbean trips as part of the proposed itineraries	<ul style="list-style-type: none"> • Myclimate partner (climate compensation scheme) • The Code supporter (child protection network) • Member of fairunterwegs.ch
7	www.kolumbientdecke.n.ch	Very small travel agency specialised in Colombia	Only sells Colombia and has a strong established network into the country; works through other operators in order to organise tailor-made trips	Own social engagement mainly using sports as means for peace building and development
8	www.latinotravel.ch	Specialised brand of the large Swiss Knecht Travel Group	Sells all kinds of Colombia trips, including coffee, Caribbean, history, etc. from shorter to longer durations	Variety of social and environmental engagements, but no formal sustainability certification
9	Voegele Reisen: www.voegele-reisen.ch	One of the larger Swiss tour operators with a global portfolio	Colombia is part of its portfolio with a classic Bogota – San Agustin – Armenia – Medellin – Santa Marta – Cartagena round trip, but a variety of options for tailor-made trips	<ul style="list-style-type: none"> • Myclimate partner (climate compensation scheme) • The Code supporter (child protection network) • Variety of own projects
Germany				
Name and contact detail of buyer		Main features of company	Colombian portfolio (Nature, Culture, Adventure)	Sustainability commitment
1	Boomerang Reisen: www.boomerang-reisen.de	Medium sized German tour operators specialised on individual and group tours; global portfolio	Colombia is part of its portfolio with a variety of different components from coffee tours, to Amazon tours, to beach holidays, to trekking tours	<ul style="list-style-type: none"> • Member in the Forum Anders Reisen
2	Fairaway Travel GmBH: www.fairaway.de	Small, German tour operator specialised in individual and smaller group travel; global portfolio	Colombia is part of its portfolio with a variety of options, including family holidays, active holidays, etc.	<ul style="list-style-type: none"> • Member in the Forum Anders Reisen • TourCert certified
3	Viventura Alemania: www.viventura.de	Medium-sized German tour operator specialised in Latin America	Colombia is an important part of its portfolio with a variety of options for individual and group trips	<ul style="list-style-type: none"> • Member in the Forum Anders Reisen • TourCert certified • Variety of other initiatives related to fair travel, such as fairwaerts und fairaway • Winner of sustainability awards

4	Diamir: www.diamir.de	Medium-sized German based tour operators specialised in experiential smaller group travel	Colombia is part of Diamir's portfolio with a variety of options	<ul style="list-style-type: none"> • Strong sustainability commitment with its own dedicated management team member • Member in the Forum Anders Reisen • Various other initiatives for sustainability and ecology
5	Aventoura: www.aventoura.de	Medium-sized Latin America specialist for individual and small group travel	Colombia part of the portfolio with a variety of options	<ul style="list-style-type: none"> • Member in the Forum Anders Reisen • TourCert certified • Variety of other initiatives related to fair travel, such as the code, the golden palm tree
6	Hauser Reisen: www.hauser-exkursionen.de	Larger German based tour operators with offices in all German speaking countries of Europe with a global portfolio and a variety of different specialisations	Diverse Colombia portfolio with options for a variety of different experiences; specifically also active and soft adventure holidays involving trekking or biking	<ul style="list-style-type: none"> • Member in the Forum Anders Reisen • TourCert certified • Winner of sustainability awards • Other strong sustainability commitments
7	Papaya Tours: www.papayatours.de	Smaller German based tour operators specialised in individual and smaller group travels in Latin America	Diverse Colombia portfolio for a variety of different experiences	<ul style="list-style-type: none"> • Member in the Forum Anders Reisen • TourCert certified • Winner of sustainability awards • Other strong sustainability commitments
8	Studiosus: www.studiosus.de	Studiosus is the European market leader in the segment of study tours and has a global portfolio	Colombia is part of its portfolio with a variety of nature and culture-oriented study tours for smaller to larger groups, normally from 10 – 20 days	<ul style="list-style-type: none"> • Member in the Forum Anders Reisen • Winner of a variety of sustainability awards <p>Strong sustainability management throughout its whole business model</p>
9	America Andina GmBH & Co KG: www.america-andina.de	<ul style="list-style-type: none"> • Strong focus on group and individual travel with a focus on sustainability • Multi-country tours • Has a sub-brand specialised on biking tourism called pedalito 	<ul style="list-style-type: none"> • Nature, culture and soft adventure in focus • Group and individual travels between 10 – 15 days at 100 – 250 Euros/day (excluding flights) • E-bike as specific product 	<ul style="list-style-type: none"> • TourCert • Forum Anders Reisen • Atmosfair • Winner of sustainability awards
10	INTI Tours EK: www.inti-tours.de	Small German based Latin America specialist tour operator	Colombia in portfolio with a variety of options for tailor made tours	<ul style="list-style-type: none"> • TourCert • Forum Anders Reisen • Atmosfair

11	Auf und Davon Reisen: https://auf-und-davon-reisen.de	Small German tour operators with a global portfolio	Colombia is currently only on offer with a 15-day trip focussed on San Agustin	<ul style="list-style-type: none"> • Forum Anders Reisen
12	Biketeam Radreisen: www.biketeam-radreisen.de	Small German based specialised bike tour operator with a global portfolio	Colombia is currently in the portfolio with a 15-day bike trip from Bogota to Medellin	<ul style="list-style-type: none"> • Forum Anders Reisen • Tourcert certified • Atmosfair
13	SKR Reisen: www.skr.de	Medium-Sized German based tour operators with a global portfolio, specialised on smaller group travel	Colombia in portfolio with a variety of options for tailor made tours, normally small groups between 2 – 14 people	<ul style="list-style-type: none"> • Forum Anders Reisen • Tourcert certified • Atmosfair • Has an own socially oriented foundation
14	Travel to Nature GmbH: www.travel-to-nature.de	Small German tour operator specialised in Latin America	Colombia in portfolio with a variety of options for tailor made tours, normally small groups between 2 – 14 people	<ul style="list-style-type: none"> • Forum Anders Reisen • Tourcert certified • Received a variety of awards for sustainability engagement
15	Neptuno Colombia Travel: www.neptunocolombia.travel	Specialised German – Colombian Tour operators based in Bogota	Offers all kinds of holidays which can be tailored to individual needs	<ul style="list-style-type: none"> • TourCert certified • Variety of other local project engagements • Member of Acotur
France				
Name and contact detail of buyer		Main features of company	Colombian portfolio (Nature, Culture, Adventure)	Sustainability commitment
1	Viventura France: www.viventura.fr	Medium-sized German tour operator specialised in Latin America, but with strong presence in French market	Colombia is an important part of its portfolio with a variety of options for individual and group trips	<ul style="list-style-type: none"> • Member in the Forum Anders Reisen • TourCert certified • Variety of other initiatives related to fair travel, such as fairwaerts und fairaway • Winner of sustainability awards
2	Terres des Andes: www.terresdesandes.org	Small French based tour operators specialised on South America; focus on smaller group travels	Colombia is part of the portfolio with typical trips of around 12 – 15 days; but possibility to tailor to personal interest	<ul style="list-style-type: none"> • Holder of a French sustainability certificate (ATR) • Winner of several sustainability awards

3	La Route des Voyages: www.laroutedesvoyages.com	Medium-sized French based tour operator with a global portfolio with a broad portfolio; also represented in French speaking Switzerland	Colombia is part of the portfolio with typical 9 – 15-day trips focussed around nature and culture	Strong commitment to sustainability, but not formal certification, awards or membership
4	Nomade Aventure: www.nomade-aventure.com	Medium-sized French based tour operator with a global portfolio with a broad portfolio	Strong Colombia portfolio with 11 trips proposed between 10 – 15 days; strong focus on soft adventure, in particular trekking	<ul style="list-style-type: none"> • ATR (agir pour un tourisme responsable) certified • Strong organisational commitment towards sustainability
5	Huwans: www.huwans-clubaventure.fr	Medium sized French tour operator with a global portfolio and specialised on soft adventure and nature tourism (trekking); also represented in French speaking Switzerland	Strong Colombia portfolio with trips between 10 – 20 days, mainly focussed around trekking, nature and culture	<ul style="list-style-type: none"> • Several engagement and projects for responsible travel • Member in a variety of networks focussed on sustainable tourism
6	Voyager Autrement: www.voyager-autrement.fr	Small sized French tour operator with a limited global portfolio, but a specialisation in niche travel linking tourism and development (doing good while travelling)	Colombia is currently only represented with one specific 15-day tour linking Bogota, the coffee region and the Carribean	No formal sustainability certification, but strong commitment to giving back to communities; several projects and development organisations as partners
7	Evaneos: www.evaneos.fr	Larger French tour operators with representations throughout Europe and beyond with a specialisation on tailor-made holidays	Colombia is part of the portfolio with a variety of trips between 10 – 20 days centred around nature, culture and adventure	No formal sustainability certification, but strong commitment to giving back to communities
8	Terres d’Aventure: www.terdav.com	Medium-sized French tour operators with a global portfolio and specialised in soft adventure travels (bike, trekking, etc.)	Colombia is part of its portfolio with 7 proposed trips between 12 – 20 days, also involving trekking and biking; Colombia does not yet rank amongst the top destinations for the agency	<ul style="list-style-type: none"> • ATR (agir pour un tourisme responsable) certified • Strong organisational commitment towards sustainability
United Kingdom				
Name and contact detail of buyer		Main features of company	Colombian portfolio (Nature, Culture, Adventure)	Sustainability commitment
1	Discover Adventure: www.discoveradventure.com	Medium-sized UK based adventure travel company offering challenges all around the world, often in collaboration with charities; strong cycling, trekking and hiking portfolio	Currently one challenge on offer in Colombia: 10-day trekking trip to the ciudad perdida	ABTA and AITO members and collaboration with various charities, but no formal certification for sustainability

2	Dragoman: www.dragoman.com	Medium sized, UK based tour operator specialised on overland trips in smaller trucks; strong adventure element	Colombia part of its portfolio, mainly with overland options to Ecuador, Peru and other places in South America	<ul style="list-style-type: none"> • ABTA and AITO members • Strong commitment to responsible travel with various own projects
3	Imaginative Traveller: https://www.imaginative-traveller.com/	Smaller UK based tour operators with a global portfolio and a focus on experiential travel, particularly focussed on smaller groups	Currently, there are 6 trips on offer in Colombia, from coffee themed, trekking or biking focused between 10 – 20 days	<ul style="list-style-type: none"> • ABTA and AITO members • Strong commitment to responsible travel with various own projects
4	Journey Latin America: https://www.journeylatinamerica.co.uk/	Smaller UK based tour operators specialised in Latin America; also specialised in bird watching	Colombia part of its portfolio with 4 – 6 propose trips between 12 – 16 days, focussed around culture and nature; including birdwatching trip	<ul style="list-style-type: none"> • ABTA and AITO members • Strong commitment to responsible travel with various own projects
5	Llama Travel: www.llamatravel.com	Small UK based tour operator specialised on Africa and Latin America, praising itself with quality at affordable cost	Colombia is currently part of the portfolio with 3 12 – 15-day trips including the usual coffee, Villa de Leyva, Caribbean route	<ul style="list-style-type: none"> • ABTA and AITO members • Winner of a variety of awards, but not sustainability specific • Strong sustainability commitment, collaboration with international NGOs to support local projects
6	On the Go Tours: https://www.onthegotours.com/	Medium-sized UK based tour operator with a global portfolio	Colombia is part of the portfolio with three 12 – 15-day tours, but many options for tailor-made trips; also smaller half day to full day trips in the portfolio	<ul style="list-style-type: none"> • ABTA and AITO members • Winner of a variety of awards, but not sustainability specific • Strong sustainability commitment, collaboration with international NGOs to support local projects
7	Travel the Unknown: www.traveltheunknown.com	Small UK-based tour operator with a global portfolio; focus on experiences and adventure	Colombia portfolio with several 10 – 20-day trips from classic to adventure to birdwatching	<ul style="list-style-type: none"> • AITO member • Winner of a variety of awards, but not sustainability specific • Strong sustainability commitment • Member of responsible travel
8	Tucan Travel: https://www.tucantravel.com/	Small UK-based our operators with a global portfolio and specialisation in adventure travel; offices in Peru, Australia and Canada, as well	Colombia in portfolio with more classic tours of 12 – 15 days	<ul style="list-style-type: none"> • ABTA and AITO members • Winner of a variety of awards, but not sustainability specific • Strong sustainability commitment with a variety of projects on animal welfare, environmental support and social responsibility

9	Undiscovered Destinations: https://www.undiscovered-destinations.com/	Small UK-based tour operators with a global portfolio, specialised on small group travel	Colombia only in portfolio with one 12-day, classic trip	<ul style="list-style-type: none"> • ABTA and AITO members • Winner of a variety of awards, but not sustainability specific • Strong sustainability commitment
10	Sunvil Holidays: www.sunvil.co.uk	Medium-sized UK based tour operator with a global portfolio and specialised on small group travels	Colombia currently in portfolio with only two 12 – 14-day trips, but options for tailor-made travels	<ul style="list-style-type: none"> • ABTA and AITO members • Winner of a variety of awards, but not sustainability specific • Foreign Office Travel Aware partner
11	Responsible Travel: www.responsibletravel.com (Best contact: suzanne@responsibletravel.com)	Medium-sized UK based match making service working with other, smaller sized and specialized tour companies	Strong Colombia portfolio with more than 20 trips from 8 days to 30 days, including biking tours, salsa tours, overland South America tours, etc.	<ul style="list-style-type: none"> • ABTA and AITO members • Very strong sustainability commitment as part of the core philosophy of the organisation with a variety of sustainability campaigns • Founders of the WTM responsible tourism awards • Several other tour operators in the UK are members of the responsible travel network

Annex 2: Different Distribution Channels and their Strengths in Promoting Sustainable Tourism

This Annex illustrates the summary recommendations of UNEP 2005 publication on Marketing of Sustainable Tourism Products. While the publication seems to be outdated to a certain extent, in particular taking into account the huge effects of disruption through technology in the tourism and travel space, many of the recommendations remain valid and interesting. In summary, the publication tried to analyze different distribution channels, such as working through tour operators, using guide books, going to trade fairs, etc. in terms of the potential in providing:

- a. supplier equity (allowing equal access to all different kinds of companies)
- b. market penetration potential (power of reaching as many different markets and people as possible)
- c. cost-benefit (whether or not the channel is cost effective in terms of results in produces, e.g. direct sales)
- d. normalization potential (effectiveness of each channel in supporting the move of sustainable tourism from niche to mainstream)

	Supplier equity	Market penetration potential	Cost-benefit analysis	Normalisation potential	Industry recommendation	Policy recommendation
DMOs & tourist boards	High	Varied	Varied	Strong	Destination brand Sales portal	Strengthen. Provide training
Tour operators	Varied	Varied	Positive	Weak	Volume at lower price	Industry driven standards
Guidebooks	High	Strong	Positive	Strong	Mid term investment	Criteria for inclusion
Media	Low	Varied	Positive	Weak	Education consumer	Public relations clearinghouse
Certification schemes	Low	Varied	Varied	Varied	B2B lobbying	Experiment
Travel fairs	Low	Weak	Negative	Strong	Education supplier	Evaluate effectiveness
Internet retailers	Varied	Strong	Varied	Strong	Risk mgmt or commission	Regulate
Consumer organisations	Low	Varied	Positive	Weak	Mid term investment	Sustainability criteria

It shows for instance:

...that working through tour operators allows varied supplier equity, as larger and more professional suppliers are often better in meeting the criteria of operators. For smaller suppliers it may therefore often be better to partner with larger local DMCs, rather than trying to get directly into the portfolio of European tour operators.

...that travel trade fairs are offering limited supplier equity, as participation fees are often exclusive for smaller suppliers and cost-benefits for suppliers are often negative, as the number of actual deals made at fairs is often limited.

...that certification schemes are often exclusive for smaller suppliers due to time, cost and management investments necessary. They are also considered mainly a tool for B2B lobbying, rather than a B2C tool.