

**“HOW CAN BE STRATEGICALLY IMPROVED THE INTERNATIONAL
ATTRACTIVITY OF THE TOURISTIC SECTOR IN COLOMBIA?”**

FERGIE VANESSA PARADA SUÁREZ

**THESIS- BACHELOR HONOURS IN BUSINESS ADMINISTRATION
ÉCOLE SUPERIEURE DE COMMERCE
GROUPE SUP DE CO
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**APPROVED BY UNIVERSIDAD DEL ROSARIO-
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DEDICATORY

This thesis is dedicated to the international people I love the most, and that I wish for them to have the opportunity to visit this amazing country and to discover all its wonders: to my American host family who opened their hearts and let me in as a truly member, to my Mexican friends Andrés and Luis who made of my exchange program an unforgettable experience, to all the other international friends that I have made along my journeys around the world, and especially to the French guy who changed my life and left an indelible mark in my heart: Nicolas.

ACKNOWLEDGEMENTS

TO GOD who has been my biggest inspiration to follow with passion and courage
my deepest dreams,

TO MY PARENTS who have been the best life example I've could ever had, and
the greatest support for me, to whom I owe the opportunity to successfully
conclude this university stage,

TO MY SISTERS because they have been there for me, all along my life,
giving me their unconditional support in every decision I make,

TO MY TEACHERS who have been responsible for planting in me the love for the
administration supported in values, and who have encouraged me to always look
up for a brilliant future,

TO MY FRIENDS because without them this experience wouldn't have been nearly
as amazing as it has been,

TO MY BELOVED CLAUSTRO MAYOR because 5 years ago it welcomed me
within its classrooms to educate me as a person of integrity and worthy of being
called Rosarista.

GLOSSARY

AGRO TOURISM: involves any agriculturally-based operation or activity that brings visitors to a farm or ranch.

ATTRACTIVITY: The quality or degree of attractive power or influence to travel to certain destination.

BUDGET: a sum of money allocated for a particular purpose.

COLOMBIA IS PASSION: is a competitiveness strategy set by the Colombian government in order to strengthen the image of the country.

COMPARATIVE ADVANTAGES: the ability of a party (an individual, a firm, or a country) to produce a particular good or service at a lower opportunity cost than another party.

COMPETITIVENESS STRATEGY: A strategy of a company aimed at increasing its competitiveness by conducting of drafting, implementing and evaluating cross-functional decisions that will enable an organization to achieve its long-term objectives.

DOMESTIC TOURISM: activity of people visiting destinations within their own country's boundaries.

ECO TOURISM: Nature-based tourism that attempts to minimize its environmental impact.

EXCHANGE RATE: The amount of one currency that a person or institution defines as equivalent to another when either buying or selling it at any particular

moment; The rate at which one currency can be exchanged for another, usually expressed as the value of the one in terms of the other.

GROSS DOMESTIC PRODUCT (GDP): The total output of goods and services produced in a given country.

INTERNATIONAL TOURISM: activity of people visiting destinations outside their own country's boundaries.

RECESSION: business cycle contraction, a general slowdown in economic activity over a period of time.

SWOT ANALYSIS: strategic planning method used to evaluate the performance of internal assessments (including an analysis of performance against previous plan) and external assessments (including an analysis of the operating environment); that result in the identification of strengths, weaknesses, opportunities, and threats involved in a project or in a business venture.

WORLD TOURISM ORGANIZATION (UNWTO): is a United Nations agency dealing with questions relating to tourism. The World Tourism Organization is a significant global body, concerned with the collection and collation of statistical information on international tourism.

ABSTRACT

In the development of this work there is described the possibility of strategically increase the potential to attract foreign tourists into the country. Colombia is a place full of biodiversity, culture and beauty; but some circumstances as war, bad international image and the poor touristic infrastructure have stopped the growth of the touristic indicators.

The implementation of different distinctive strategies to position the touristic industry and to accomplish continuous improvements, such as the definition of contingency plans to fight against violence and insecurity, the enhancement of the infrastructure conditions, the better training of all the people involved within this market segment and also the efforts to spread clear and efficient information about Colombia; are some of the main objectives that need to be achieved in order to increase the level of attractivity of the sector for international visitors, and also, these strategies will contribute to the improvement of the performance indicators of the industry and the country in general.

KEY WORDS:

- Strategic potential
- Distinctive strategies
- Level of attractivity
- Performance indicators
- Continuous improvements

RESUMEN

Durante el desarrollo de este trabajo de grado, se describe la posibilidad de incrementar estratégicamente el potencial de atraer visitantes extranjeros al país. Colombia es un lugar lleno de biodiversidad, cultura y belleza; pero algunas circunstancias como la guerra, la mala imagen a nivel internacional y la pobre infraestructura turística, han detenido el crecimiento de los indicadores turísticos.

La implementación de diferentes estrategias distintivas para posicionar la industria turística y para lograr el mejoramiento continuo, como la definición de planes de contingencia para luchar en contra de la violencia y la inseguridad, el mejoramiento de las condiciones de infraestructura, la mejor capacitación y entrenamiento de todas las personas relacionadas con este segmento de mercado y también los esfuerzos por difundir en mayor proporción información clara y eficiente sobre Colombia; son algunos de los principales objetivos que deben ser alcanzados para incrementar el nivel de atractividad del sector para visitantes internacionales, y también, estas estrategias contribuirán al mejoramiento de los indicadores de desempeño del sector y del país en general.

PALABRAS CLAVES:

- Potencial estratégico
- Estrategias distintivas
- Nivel de atractividad
- Indicadores de desempeño
- Mejoramiento continuo

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INTRODUCTION

Colombia is a country with many resources and great opportunities. Although throughout history its fate has been clouded by large inequalities and conflicts that have created a negative image not only domestically but internationally.

Because this country has many natural resources in flora and fauna, as well as a great cultural diversity that constantly enrich it; it is necessary to find an element of social transformation that encourages and motivates the change through a new social security policy, an efficient use of these resources and a renewal of its global image.

Tourism is the element that the country needs to begin its phase of improvement. In recent years Colombia has made great efforts to achieve favorable economic growth. That's why *La Patria* informative portal, said in 2007 that "tourism is the most dynamic sector of today's economy after oil and coal in Colombia, representing 2% of the internal GDP and 12% of GDP at a worldwide level.¹

The country has been developing various touristic policies that help strengthen and increase national and international competitiveness of the products and destinations that it offers, as well as it tries to change the negative image of the country; since the main problems that give Colombia an unattractive image mainly include violence and insecurity, lack of formal education, training and expertise that leads to a poor quality of service, inadequate infrastructure in key destinations, and especially the lack of accurate information for foreign visitors.

¹ ¹ From: "Colombia: El turismo es el nuevo impulsor del PIB". In site online: http://www.adnmundo.com/contenidos/turismo/colombia_turismo_impulsor_pib_200508.html

I decided to work on this subject because I want to analyze the touristic industry in Colombia to understand that this country is much more than war and insecurity, because Colombia is considered as a country full of culture, of friendly people and amazing and paradisiacal places. We have to be aware of the fact that it has lots of problems that need to be solved and that is the reason why I want to base my project on three main questions: What are the most relevant touristic products and places that Colombia should promote in order to satisfy better the customer's needs? How can Colombia motivate international tourism? And finally, what are the main variables that negatively influence the demand for tourism? And how should Colombia deal with them?

Beginning with this I will try to demonstrate that the touristic sector in Colombia has a great potential to succeed but it needs to work hard in improving its international image. It has to implement different strategies to develop a higher appealing from international visitors and to overcome the weaknesses; in order to demonstrate that life in Colombia is not as everybody thinks.

PART I: DESCRIPTION OF THE COUNTRY AND THE SECTOR

1.1 COLOMBIA GENERAL FACTS

The Republic of Colombia, with Bogota as the capital, is strategically located as an intermediate point between North and South America, and it is the only country in South America which has coasts on both the Pacific and the Atlantic oceans.

Due to its geographical location, it possesses a great climatic diversity and is rich in natural resources. Colombia has between 14% and 15% of the world's biodiversity that represents the second place worldwide after Brazil.

It is organized as a democratic decentralized republic divided into thirty-two departments. These departments are grouped into five unique regions: the Andean region, the Caribbean region, the Pacific region, Orinoquia region and the Amazon region; each one has a specified geographical location, gastronomy, activities and customs.

One of Colombia's main assets is its human capital. Colombian labor is considered the best within the Andean Community and among the best qualified in Latin America for management and operational positions. "According to IMD 2009, Colombia is the regional leader in entrepreneurship, highest labor force and is ranked 2nd most flexible labour system in Latin America according to the World Bank 2008"². It is also recognized as one of the most equitable for men and women, along with Argentina and Brazil.³

Colombia has a population of 45.7 million (UN, 2009) within an area of 1.14 million sq km. The major language is Spanish and the most important religion is catholic.

² Based on: "Invest in Colombia" Site online: <http://www.investincolombia.com.co/why-colombia.html>

³ Based on: "Turismo en Colombia: Un sector de oportunidades" Site online: <http://www.mincomercio.gov.co>

The life expectancy is 69 years for men and 77 years for women (UN). The GNI per capita is US \$4,660 according to the World Bank, 2008. In Colombia, the main incomes come from the exports of petroleum, coffee, coal, gold, bananas, cut flowers, chemicals, emeralds, cotton products, sugar, and livestock.⁴ “During the past five years, the Colombian economy grew by 4% per year. In 2008, Colombia’s GDP registered an increase of 2.5%, a positive growth during global recession”.⁵

1.1.1 The Caribbean Region

It is located in the extreme north of Colombia. It is formed by the departments of Atlántico, Bolívar, Cesar, Córdoba, La Guajira, Magdalena, Sucre, San Andrés, and Providencia and Santa Catalina. Most of its territory is flat, but also in Santa Marta can be found La Sierra Nevada in which people can enjoy the highest peaks of the country: the Bolívar and the Cristóbal Colón. In most of the Caribbean region the climate is warm and dry, with spectacular desert landscapes such as La Guajira and humid as the Gulf of Uraba, near the border with Panama.⁶

According to the report of “tourism in Colombia: a sector full of opportunities” published by the ministry of industry, commerce and tourism in 2003, they describe the Caribbean region as “Sun every day of the year, extensive beaches free from the influence of hurricanes, pre-Columbian and colonial cities, ports, industrial production, active night life, ancient cultural events, destinations known for organizing conferences and conventions for world events, and parks and natural sanctuaries that protect exotic biodiversity of the region; all of this, constitute the offer of this region for the implementation of many tourism activities”.

⁴ “Country profile: Colombia”. Site online: http://news.bbc.co.uk/2/hi/americas/country_profiles/1212798.stm

⁵ “Invest in Colombia” Site online: <http://www.investincolombia.com.co/why-colombia.html>

⁶ Taken from: “Caribe”. Site online: <http://www.colombianparadise.com/destinos/caribe.html>

1.1.2 Pacific Region

This region is formed by the only four departments with a coastline on the Pacific Ocean. They are Chocó, Valle del Cauca, Cauca and Nariño. It is a region with beautiful landscapes and exotic places, considered the region with the most biodiversity of the country.⁷

Colombia's Pacific coast is one of the wettest regions of the planet that offers nature lovers, virgin forests, fabulous beaches and exotic islands, all together to practice their flagship product: ecotourism.⁸

1.1.3 Orinoquia Region

This region derives its name from the rivers that originate in the mountains and cross its territory until they get to the Orinoco River, which sets the limits between Colombia and Venezuela. Most of the rivers of the Orinoco in Colombia are navigable, including the Guaviare, Meta, Vichada, Tomo and Arauca. Those rivers also receive the flow of other rivers, creeks and streams; making this region rich in water, flora and fauna. This immense territory shows one of the most beautiful regions in Colombia that has six typical ecosystems and diverse natural landscapes: rain forest with tall trees, rich in oil fields and large tracts of plains that represent 20% Colombian territory.⁹

1.1.4 Andean Region

This region is formed by the departments of Antioquia, Boyacá, Caldas, Cundinamarca, Huila, Norte de Santander, Quindío, Risaralda, Santander and Tolima. This region is named in honor of the chain of mountains called Andes. It presents a variety of altitudes and climates, is the country's most populous area where we can find valleys, canyons, plateaus, and three mountain ranges.

It is possible to find various Indians settlements who still maintain their customs and cultures, and that contribute to the ethnic and cultural richness of Colombia.

⁷ Taken from: "Pacífico" Site online: <http://www.colombianparadise.com/destinos/pacifico.html>

⁸ "Turismo en Colombia: Un sector de oportunidades" Site online: <http://www.mincomercio.gov.co>

⁹ Taken from: "Orinoquia". Site online: <http://www.colombianparadise.com/destinos/orinoquia.html>

The Andean Region has all the thermal layers and because it is located within the tropical region, it has helped to provide ideal habitats that have led Colombia to become one of the countries that offers the greater diversity of flora and fauna worldwide.¹⁰

1.1.5 Amazon Region

This region is formed by the departments of Amazonas, Caquetá, Guainía, Guaviare, Putumayo and Vaupés, located in the southeast part of the country. It presents a variety of plant and animal species, different for example from those that can be found in the Andean region. In fact, the Amazon region covers an extensive part of the territory of Colombia, about 40% of the total and it is the least populated region of the country.

In the Amazon region, as in the Andean region, Colombia has nine national parks “exotic places such as Amacayacu National Park, lakes, Tarapoto, and towns such as St. Martin and Puerto Nariño”¹¹ created to preserve its rich biodiversity and to establish sanctuaries for them within the various plant and animal species that inhabit them. So, the Amazon is an ideal destination for lovers of ecotourism, because there are still many undiscovered natural beauties.¹²

¹⁰ Taken from: “Andina”. Site online: <http://www.colombianparadise.com/destinos/andes.html>

¹¹ “Turismo en Colombia: Un sector de oportunidades” Site online: <http://www.mincomercio.gov.co>

¹² Taken from: “Amazonas”. Site online: <http://www.colombianparadise.com/destinos/amazonas.html>

1.2 THE TOURISTIC SECTOR

Tourism is described according to the Department of industry, commerce and tourism of Colombia as “the phenomenon resulting from a network of socio-economic, cultural and environmental impacts, generated by the displacement and temporary stay of people who have among other things, recreation and leisure, visiting places that offer goods and services to perform particular acts of consumption”.¹³

Also, in 2003 the Department of industry, commerce and tourism published a report where they stand that “tourism is for Colombia, given its potential and comparative advantages, a source of business and investment as well as oil and its derivatives but wide better in terms of sharing of its benefits and its dynamic effect on the rest of the economy”¹⁴

One of the main reasons to support that tourism has a great potential is because Colombia is a country characterized by its unbelievable diversity and it can offer different activities and environments to the visitors. It is divided into five well differentiated regions each one with its own weather, customs, biodiversity and attractiveness; that allow tourists to enjoy the richness of the traditions, the festivals and the nature.

Nowadays Colombia counts with seven main products to offer, those are: sun and beach especially for sunny places as the Caribbean region, history and culture, agro tourism that is very important in the Andean region, eco tourism that is being well exploited in the Amazon, sports and adventures, ferias and festivals and finally

¹³ Taken from: “Definición del sector turismo en Colombia”. Site online: <http://www.mincomercio.gov.co/eContent/NewsDetail.asp?ID=6911&IDCompany=14>

¹⁴ “Turismo en Colombia: Un sector de oportunidades” Site online: <http://www.mincomercio.gov.co>

capital cities which also help to develop the economy through shopping, health, congress, conventions and incentives sup-products.¹⁵

According to these definitions we can start to approach to an evaluation of the importance of the tourism for the economy and the culture of Colombia. Given that it is a developing country that has been improving its economic performance over the past few years through different international agreements, incentives and with the help of governmental entities as "Proexport". This entity is involved in the promotion of the Colombian exportations, the foreign investment and the tourism inside Colombia in order to improve the positioning of this country worldwide.

Proexport describes the situation of the touristic sector in Colombia as follows: "In general terms, the inbound tourism in Colombia has had a significant increase during the last 5 years with an annual compound growth of 15% (2002-2007). But in 2008 a slowdown was seen and a 9.7% growth: travelers reported by the DAS (Security Administrative Department), increased by 2.3% while those arriving on cruise ships increased by almost 80%. During 2008 the global tourism industry, affected by the Global financial crisis presented a growth of just 2% and the growth in the Americas was of a 4%.

According to the provisional final figures of 2008, travelers entering Colombia through different control points of the DAS, increased by 27000 people compared to 2007, closing 2008 with the arrival of 1.222.966 international travelers. It presented a growth of 2.3%, well below the 13.5% recorded in 2007 and the lowest in the last 4 years. Even with this low growth in 2008, reported travelers were more than double of those recorded in 2002.

The cruise industry has also had a positive development. While in 2003 the number of passengers and arrived ships decreased by more than 50% compared

¹⁵ According to: "Turismo en Colombia: Un sector de oportunidades" Site online: <http://www.mincomercio.gov.co>

to 2002, it has been increasing gradually and finally in 2007, it met and exceeded the levels of year 2002 (94 thousand passengers) with about 127 thousand passengers and mainly thanks to the work of Proexport with companies such as Mediterranean Shipping Cruise, Princess Cruise, Holland America and Royal Caribbean.

The dynamic of 2008 has been particularly favorable when compared to 2007. The number of ships grew by 63% reaching 161 boats, while passengers increased over 80% reaching 230 thousand cruise passengers. The number of people per boat also increased from 1282 to 1418 people. So, compared to 2002, cruise tourists increased by 142%".¹⁶

1.2.1 Statistics

To evaluate the impact of the touristic sector on the whole economy, we are going to analyze some statistics based on the three main elements. First, we will see some charts of the last 4 years for the arrival of foreign visitors by nationality; in order to determine which countries have a greater appealing for Colombia; second, we will see the analysis from a different point of view by determining the cities that are the most visited by foreign visitors and finally we must take into account that an important income of international travelers come from the cruises.

Arrival of foreign visitors by nationality

In 2006 there was a great concurrence of travelers coming from the United States on the first place with a 24.55% over the total of travelers (1.063.348). Also there is a high level of visitors that come from borderlines as Venezuela and Equator. One of the countries that make the top five is Spain, the only non-American country. The tourism grew a 12, 42% from 2006 to 2007.

¹⁶ Taken from: "Evolucion turismo 2002-2008". In site online:
<http://www.proexport.com.co/vbecontent/library/documents/DocNewsNo10136DocumentNo8302.pdf>

Tabla 1: Arrivals of foreign visitors by nationality, not included border points, 2006-2007

	NATIONALITY	2006	2007	DIFFERENCE	VARIATION	PART. 2007
1	United States	258 579	265 632	7 073	2,7%	22,2%
2	Venezuela	141 596	196 863	55 267	39,0%	16,5%
3	Equator	100 222	110 508	10 286	10,3%	9,2%
4	Spain	66 422	67 117	695	1,0%	5,6%
5	Mexico	52 037	60 340	8 303	16,0%	5,0%
6	Peru	47 706	58 332	10 626	22,3%	4,9%
7	Argentina	40 254	50 632	10 378	25,8%	4,2%
8	Brazil	31 712	41 145	9 433	29,7%	3,4%
9	Panama	31 177	31 459	282	0,9%	2,6%
10	Chile	23 765	29 371	5 606	23,6%	2,5%
11	Canada	27 115	28 279	1 164	4,3%	2,4%
12	France	24 815	27 611	2 796	11,3%	2,3%
13	Italy	22 487	24 620	2 133	9,5%	2,1%
14	Germany	19 000	21 668	2 668	13,7%	1,8%
15	Costa Rica	25 138	21 327	-3 811	-15,2%	1,8%
16	United Kingdom	17 707	17 291	-416	-2,3%	1,4%
17	Netherlands	17 056	15 731	-1 325	-7,8%	1,3%
18	Switzerland	8 008	8 036	28	0,3%	0,7%
19	Guatemala	8 215	7 837	-378	-4,6%	0,7%
20	Israel	6 012	7 743	1 731	28,8%	0,6%
21	Others	94 275	103 878	9 603	10,2%	8,7%
	TOTAL	1 053 348	1 195 440	142 092	13,5%	100%

Source: DAS-Vice Ministry of tourism estimates.

In this chart we can see that the United States, Venezuela, Equator and Spain remain constant in their positions; but Mexico reduces the number of incoming travelers and Peru raises a position. There is a slowdown in the level of travelers coming both from the United States and Equator between 2007 and 2008. This behavior may be attributed to the financial crisis that suffered the housing market in USA, because this caused instability to the markets and created an uncertain environment with limited resources.

Tabla 2: Arrivals of foreign visitors by nationality, not included border points, accumulated from January to December 2007-2008

	NATIONALITY	JAN-DEC 2007	JAN-DEC 2008	DIFFERENCE	VARIATION	PART. 2007	PART. 2008
1	United States	265.651	264.278	-1.373	-0,5%	22,2%	21,6%
2	Venezuela	196.863	237.056	40.193	20,4%	16,5%	19,4%
3	Equator	110.508	93.426	-17.082	-15,5%	9,2%	7,6%
4	Spain	66.748	67.350	602	0,9%	5,6%	5,5%
5	Peru	58.332	66.283	7.951	13,6%	4,9%	5,4%
6	Mexico	60.340	59.084	-1.256	-2,1%	5,0%	4,8%
7	Argentina	50.632	51.039	407	0,8%	4,2%	4,2%
8	Brazil	41.145	45.489	4.344	10,6%	3,4%	3,7%
9	Chile	29.371	29.704	333	1,1%	2,5%	2,4%
10	Panama	31.459	28.337	-3.122	-9,9%	2,6%	2,3%
11	Canada	28.279	27.606	-673	-2,4%	2,4%	2,3%
12	France	27.611	27.377	-234	-0,8%	2,3%	2,2%
13	Italy	24.620	24.315	-305	-1,2%	2,1%	2,0%
14	Germany	21.668	22.128	460	2,1%	1,8%	1,8%
15	Costa Rica	21.326	21.080	-246	-1,2%	1,8%	1,7%
16	Holland	14.711	12.750	-1.961	-13,3%	1,2%	1,0%
17	United Kingdom	14.071	11.961	-2.110	-15,0%	1,2%	1,0%
18	Netherlands	2.393	7.820	5.427	226,8%	0,2%	0,6%
19	Switzerland	8.036	7.727	-309	-3,8%	0,7%	0,6%
20	Others	121.679	117.292	-4.387	-3,6%	10,2%	9,6%
	TOTAL	1.195.443	1.222.102	26.659	2,2%	100,0%	100,0%

Source: DAS- Vice Ministry of tourism estimates.

After the crisis happened, the markets started again to stabilize and to grow. The incoming visitors from United States grew 19. 1% in 2008-2009. The total amount of visitor grew from 1.222.966 in 2008 to 1.353.700 in 2009; which represents a growth of 10. 7% that is low compared to 2007 (13, 5%) but high if we compared with 2008 when the crisis occurred and when there was only a growth of 2.2%.

Tabla 3: Arrivals of foreign visitors excluding border lines and cruises, participation by nationality 2008-2009

	NATIONALITY	2008	2009	DIFFERENCE	VARIATION
1	United States	264.453	314.858	50.405	19,1
2	Venezuela	237.329	238.078	749	0,3
3	Equator	93.452	101.820	8.368	9,0
4	Peru	66.313	77.733	11.420	17,2
5	Spain	69.774	77.913	8.139	11,7
6	Argentina	59.107	61.358	2.251	3,8
7	Mexico	51.057	57.474	6.417	12,6
8	Brazil	45.506	47.493	1.987	4,4
9	Chile	29.716	36.168	6.452	21,7
10	Panama	28.379	30.956	2.577	9,1
11	France	27.381	30.366	2.985	10,9
12	Canada	27.632	28.157	525	1,9
13	Italy	22.133	26.138	4.005	18,1
14	Germany	24.320	26.054	1.734	7,1
15	Costa Rica	21.179	20.184	-995	-4,7
16	United Kingdom	17.112	18.947	1.835	10,7
17	Others	138.123	160.003	21.880	15,8
	TOTAL	1.222.966	1.353.700	130.734	10,7

Source: DAS- Vice Ministry of tourism estimates.

Arrival of foreign visitors by city of destination

In this chart we can observe that Bogota, the capital of Colombia is the maximum center of attraction for external visitors. Other cities as Cartagena, Medellin, Cali and San Andres represent a high portion of the tourists.

Tabla 4: Arrival of foreign visitors not included border points, by city of destination 2006-2007

	CITY	2006	2007	DIFFERENCE	% VARIATION	PART JAN.2007
1	BOGOTA	517.643	616.771	99.128	19.1%	51.6%
2	CARTAGENA	126.973	133.172	6.199	3.3%	11.1%
3	MEDELLIN	95.069	104.445	9.376	9.8%	8.7%
4	CALI	86.879	102.296	15.417	17.6%	8.6%
5	SAN ANDRES	61.870	59.082	-2.788	-4.5%	4.9%
6	BARRANQUILLA	44.802	48.882	4.080	9.1%	4.1%
7	CUCUTA	15.128	17.895	2.767	18.3%	1.5%
8	PEREIRA	14.074	14.452	378	2.7%	1.2%
9	BUCARAMANGA	12.413	17.564	5.151	41.5%	1.5%
10	SANTA MARTA	11.923	14.000	2.077	17.4%	1.2%
11	IPALES	6.740	7.593	853	12.7%	0.6%
12	MAICAO	4.875	5.282	407	8.3%	0.4%
13	ARMENIA	4.828	4.735	-93	-1.9%	0.4%
14	MANIZALES	3.929	4.499	570	14.5%	0.4%
15	PALMIRA	2.889	2.017	-872	-30.2%	0.2%
16	IBAGUE	2.277	2.467	190	8.3%	0.2%
17	LETICIA	1.787	2.217	430	24.1%	0.2%
18	VALLEDUPAR	1.764	2.513	749	42.5%	0.2%
19	VILLAVICENCIO	1.265	1.731	466	36.8%	0.1%
20	BOHACHA	918	2.083	1.165	126.9%	0.2%
21	RESTO	31.942	31.724	-218	-0.7%	2.3%
	TOTAL	1.653.348	1.196.440	-456.908	-27.6%	100%

Source: DAS- Vice Ministry of tourism estimates.

Between 2007 and 2008 the positions remained the same. The five major cities represent a great part of the volume of tourists but there was a negative growth both to Cali and San Andres, maybe because travelers had other priorities during the time of crisis.

Tabla 5: Arrivals of foreign visitors by city of destination, not including border points, accumulated from January to December 2007-2008.

	CITY	JAN-DEC 07	JAN-DEC 08	DIFFERENCE	VARIATION	PART. 07	PART. 08
1	BOGOTA	616.771	626.965	10.194	1.7%	51.6%	51.3%
2	CARTAGENA	133.172	141.357	8.185	6.1%	11.1%	11.6%
3	MEDELLIN	104.445	107.592	3.147	3.0%	8.7%	8.8%
4	CALI	102.296	99.047	-3.249	-3.2%	8.6%	8.1%
5	SAN ANDRES	59.105	57.737	-1.368	-2.3%	4.9%	4.7%
6	BARRANQUILLA	48.882	47.974	-908	-1.9%	4.1%	3.9%
7	BUCARAMANGA	17.564	24.673	7.109	40.5%	1.5%	2.0%
8	CUCUTA	17.895	22.257	4.362	24.4%	1.5%	1.8%
9	SANTA MARTA	14.000	14.885	885	6.3%	1.2%	1.2%
10	PEREIRA	14.452	12.660	-1.792	-12.4%	1.2%	1.0%
11	IPALES	7.593	6.893	-700	-9.2%	0.6%	0.6%
12	ARMENIA	4.735	4.903	168	3.5%	0.4%	0.4%
13	MANIZALES	4.499	4.362	-137	-3.0%	0.4%	0.4%
14	MAICAO	5.282	4.300	-982	-18.6%	0.4%	0.4%
15	VALLEDUPAR	2.513	2.977	464	18.5%	0.2%	0.2%
16	BOHACHA	2.083	2.464	381	18.3%	0.2%	0.2%
17	IBAGUE	2.467	2.311	-156	-6.3%	0.2%	0.2%
18	LETICIA	2.217	2.179	-38	-1.7%	0.2%	0.2%
19	VILLAVICENCIO	1.731	1.783	52	3.0%	0.1%	0.1%
20	NEIVA	1.416	1.325	-91	-6.4%	0.1%	0.1%
21	RESTO	32.305	33.408	1.103	3.4%	2.3%	2.3%
	TOTAL	1.195.443	1.222.192	26.749	2.2%	100.0%	100.0%

Source: DAS- Vice Ministry of tourism estimates.

Tabla 6: Arrivals of foreign visitors excluding border lines and cruises, participation by city of destiny 2008-2009

	CITY	2008	2009	DIFFERENCE	VARIATION
1	Bogotá D. C.	627.056	692.800	65.744	10,5
2	Cartagena de Indias	141.367	155.259	13.892	9,8
3	Medellín	107.841	143.084	35.243	32,7
4	Cali	99.149	98.056	-1.093	-1,1
5	Barranquilla	57.941	50.870	-7.071	-12,2
6	San Andrés	48.020	47.526	-494	-1,0
7	Bucaramanga	24.738	23.005	-1.733	-7,0
8	Santa Marta	22.342	17.078	-5.264	-23,6
9	Cúcuta	14.695	15.928	1.233	8,4
10	Pereira	12.662	15.878	3.216	25,4
11	Ipiales	6.898	6.511	-387	-5,6
12	Armenia	4.903	5.936	1.033	21,1
13	Manizales	4.363	5.004	641	14,7
14	Valledupar	2.978	3.484	506	17,0
15	Maicao	4.350	3.164	-1.186	-27,3
16	Resto	43.663	70.117	26.454	60,6
17	Total	1.222.966	1.353.700	130.734	10,7

Source: DAS- Vice Ministry of tourism estimates.

Arrival of foreign visitors by cruises

Cruises are becoming the new tendency in the touristic sector. Colombia has three main ports that have the right infrastructure to receive these international boats in its limits: Cartagena, Santa Marta and San Andres. Cartagena is the main receptor, followed by Santa Marta and finally San Andres. In only three years, the number of ships that landed in Cartagena was more than multiplied by four; it passed from 38 ships in 2006 to 168 in 2009 what demonstrates that Colombia is becoming more and more competitive worldwide.

Tabla 7: Arrival of Cruises to Colombia 2006-2007

NUMBER OF SHIPS	Cartagena		Santa Marta		San Andrés		Total	
	2007	2006	2007	2006	2007	2006	2007	2006
	January	5	6	2	0	1	5	8
February	10	6	2	0	0	3	12	9
March	6	7	2	0	1	0	9	7
April	9	6	1	0	1	2	11	8
May	1	1	0	0	0	0	1	1
June	0	0	0	0	0	0	0	0
July	0	0	0	0	0	0	0	0
August	1	0	0	0	0	0	1	0
September	1	1	0	0	0	1	1	2
October	10	2	1	1	2	0	13	3
November	14	4	2	1	2	0	18	5
December	19	5	3	1	3	1	25	7
ACUMULATE	76	38	13	3	10	12	99	53

NUMBER OF PASSENGERS	Cartagena		Santa Marta		San Andrés		Total	
	2007	2006	2007	2006	2007	2006	2007	2006
	January	6.282	6.967	2.847	0	634	2.869	9.763
February	11.078	5.759	2.523	0	0	1.648	13.601	7.407
March	5.192	6.380	3.284	0	658	0	9.134	6.380
April	12.470	6.457	148	0	384	1.219	13.002	7.676
May	1.329	1.365	0	0	0	0	1.329	1.365
June	0	0	0	0	0	0	0	0
July	0	0	0	0	0	0	0	0
August	999	0	0	0	0	0	999	0
September	1.945	580	0	0	0	342	1.945	922
October	19.336	3.154	1.890	350	421	0	21.647	3.504
November	19.504	4.948	1.440	400	1.280	0	22.224	5.348
December	30.757	6.414	1.300	1.800	1.189	294	33.246	8.508
ACUMULATE	108.892	42.024	13.432	2.550	4.585	6.372	126.890	50.946

Source: SPRC, SPSM, San Andres Island Port

Tabla 8: Arrival of Cruises to Colombia 2008-2009

NUMBER OF SHIPS									
	Cartagena		Santa Marta			San Andrés		Total	
	2008	2009	2008	2009*	2008	2009	2008	2009	
January	24	26	2	(4) 2	0	0	26	32	
February	18	24	0	(4) 0	2	1	20	29	
March	19	23	3	(5) 1	1	2	23	31	
April	22	24	3	(4) 2	1	0	26	30	
May	3	1	0	1	0	0	3	2	
June	0	0	0	0	0	0	0	0	
July	0	0	0	0	0	0	0	0	
August	1	1	0	0	0	0	1	1	
September	1	1	0	0	0	0	1	1	
October	10	19	0	(4) 2	0	0	10	25	
November	18	20	3	(5) 0	1	0	22	25	
December	21	29	6	(8) 4	2	1	29	42	
ACUMULATE	137	168	17	(34) 12	7	4	161	218	

NUMBER OF PASSANGERS									
	Cartagena		Santa Marta			San Andrés		Total	
	2008	2009	2008	2009*	2008	2009	2008	2009	
January	26.653	37.076	663	(9.500) 881	0	0	27.516	47.517	
February	28.710	40.412	0	(9.900) 0	910	561	29.620	50.873	
March	25.220	38.363	2.445	(12.300) 598	667	313	28.332	51.574	
April	37.792	42.784	2.995	(7.268) 2.003	209	0	40.996	52.055	
May	1.046	1.240	0	1.268	0	0	1.046	2.508	
June	0	0	0	0	0	0	0	0	
July	0	0	0	0	0	0	0	0	
August	2.532	1.931	0	0	0	0	2.532	1.931	
September	1.979	1.913	0	0	0	0	1.979	1.913	
October	19.655	27.838	0	(4.066) 3.692	0	0	19.655	35.596	
November	27.303	32.853	2.208	(4.670) 0	1.137	0	30.648	37.523	
December	35.801	45.847	8.913	(14.202) 5.122	1.163	32	45.897	65.203	
ACUMULATE	206.691	270.257	17.424	(75.530) 4.106	906	228.221	346.693		

Source: SPRC, SPSM, San Andres Island Port

*In 2009 are included in parenthesis for Santa Marta, cruises with origin in Cartagena.

PART II: ANALYSIS OF THE TOURISTIC POTENTIAL

2.1 EVALUATION OF THE MOST POPULAR PLACES

In order to approach to a solution to the question about what the most relevant touristic products and places that Colombia should promote are, in order to satisfy better the visitors; we should define according to the statics of incoming visitants and the potential of each city the best places and the main products that they should reinforce depending of what customers want when they travel to another country. This may be culture, weather or biodiversity. It depends on each person and everybody should be satisfied.

2.1.1 Caribbean Region:

In this region there are three main touristic places: Cartagena which was been declared human patrimony by UNESCO and that is the main port to receive Caribbean cruises, it occupied the second position in the last year with a total of 155.259 visitors and 270.257 cruise passengers. Barranquilla with its traditional "Barranquilla's festival" had 50.870 visitors and occupied the fifth position in the popularity ranking. San Andres Island that has virgin beaches and amazing landscapes and it is in the 6 position with 47.526 visitors in 2009 and 906 cruise passengers. And finally, Santa Marta that is well known for the Tayrona park and for the snow mountain that rises a few meters from the coast and it gets the 8 position in the chart with 17.078 visitors and 75.530 cruise passengers in the last year.

The main products of this region are sun and beach, ecotourism and history and culture because it also counts with some of the most important celebrations in Colombia like the Barranquilla's carnival and the beach festivals.

2.1.2 Pacific Region:

The main attractive of this region is the ecotourism. It counts with a great biodiversity of flora and fauna due to its climate richness. The pacific coast is famous because it receives once per year the sea turtles that come to spawn and also tourist are delighted every year when they listen to the beautiful symphonies emitted by the whales during the mating process.¹⁷

2.1.3 Orinoquian Region:

This is a small region where agro tourism, ecotourism and fairs and festivals are the main touristic products. Usually people visit this place to be involved in the festivals of “Coleo” or to visit the natural national parks as the Macarena in Meta or Tupamarro in Vichada.

2.1.4 Andean Region:

Capitals cities as Bogota D.C. Medellin and Bucaramanga are situated in the top levels of the visitors chart. The main reason is because this cities offer a mix of history, entertainment and development. Also places like Armenia where you can find one of the most important parks for the agroturism: the Coffee National park and ecotourism: Natural National park of Snow Mountains has been in a stable position in the last few years.

2.1.5 Amazon Region:

This is a new touristic destination for visitors to come. In recent years the government has supported the creation of 9 natural parks to preserve the wildlife and to intimate tourists with the magnificence of the jungle. People usually visit this region in order to enjoy ecotourism.

¹⁷ Based on: “Pacifico” Site online: <http://www.colombianparadise.com/destinos/pacifico.html>

2.2 VARIABLES THAT AFFECT THE TOURISTIC BEHAVIOR

These elements are essential to understand some of the main constrains for travelers. They worry about money, time, and comfort; and a good definition and knowledge of those factors may increase the possibility of visiting a country or not.

2.2.1 Exchange Rate:

When deciding where to travel, people are usually concerned about the budget. They need to know how much money in average could be spent in a trip. That is the reason why exchange rate is so important when making decisions. In Colombia, the currency is the Colombian Peso COP. To March 13 2010, It is worth 1USD= 1892, 99 COP and 1 EUR= 2603.81 COP.¹⁸ The quality of life is cheaper in Colombia if compared to most North American and European residents that have a stronger currency; that is why a trip to Colombia will usually be very accessible for international visitors. Regarding neighbor countries, the difference is not as obvious, however Colombia is a great destination that don't necessarily requires a lot of investment.

2.2.2 Seasonal Destinations:

According to the research made by the Ministry of Industry, Commerce and Tourism; the domestic touristic behavior in Colombia is based in the 17 patriotic and national religious festivities in the annual work calendar and in school holiday seasons in the middle and at the end of the year.¹⁹ On the other hand, the international tourism is based on different activities such as business, pleasure, conventions, health and others. In this category, in 2009 business is the most representative figure with a 58.6% of the total; followed by pleasure with a 31,4% based on information given by the DANE. If we take in consideration these results, we might understand that Colombia is

¹⁸ According to: "Portafolio" In site online: www.portafolio.com.co

¹⁹ According to: "Turismo en Colombia: Un sector de oportunidades" Site online: <http://www.mincomercio.gov.co>

being chosen as an intermediate point to do business and that there is a need to promote the tourism not only on vacation time but to incentive the flow of tourist during the whole year.

2.2.3 Hotels:

The location of a nice place to stay during the vacation time is another important factor when traveling. Nowadays, Colombia is trying to improve the infrastructure and the services of its hotels in order to welcome all the incoming visitors at different levels. Tourist can find from cheap hostels to 5 to 6 stars hotels. There are even many international hotel chains that offer great service such as Accor, Days Inn, Sol Melia, Radisson, Intercontinental, Hilton International, forte Travelodge, Sheraton, Suites Jones, and Chateau Relais.

2.3. GOVERNMENTAL INITIATIVES

During the last few years, the Colombian government has developed different alternatives in order to increase the security levels and the confidence in the touristic places of Colombia. They have worked hard to improve the image of Colombia not only among its citizens but all around the world. Since the years of Pablo Escobar and the drug cartels in the late 80's, the global image of Colombia was been always related to narcotrafic, insecurity and war. Many people were scared of visiting Colombia because they thought they were going to be involved in some of the internal conflicts and that represented a high level risk.

Knowing the importance of tourism for the economy of a country and for the enrichment of the culture, Colombia decided to work hard in two main programs called "Vive Colombia, viaja por ella" in english it will be "Live Colombia, Travel around it"; and "Colombia es pasión" in english "Colombia is passion". The main objectives of these two programs are to motivate people to visit Colombia with no

fear and to demonstrate that Colombia is an amazing country full of magic, peace and beauty.

2.3.1. Colombia Is Passion

Since 2005 the government developed a new strategy to position Colombia worldwide. This initiative is called “Colombia is Passion” and according to the official web site it is a competitiveness strategy that strives to strengthen the image of our country abroad by generating trust among foreign investors and audiences with the aim of obtaining more and better opportunities in the fields of trade culture, investment, and tourism [...]works hand in hand with local and international media to promote Colombia overseas by disseminating positive information and news about the country.²⁰

The main idea is to motivate foreign people to come to Colombia, to enjoy its wonders and to tell their stories to others. Many business people, investors, media and Colombians are working hard to support this cause.

2.3.2. Live Colombia, Travel It

“Vive Colombia, viaja por ella” in english “live Colombia, travel it” was one of the programs that were implemented by the president Alvaro Uribe Velez (2002-2010) as part of his democratic decisions. His idea was to create and to promote touristic caravans to different places with cultural or recreational appealing but specially with the help of the national police department to ensure that every person that leaves the house will safely enjoy the trip and will comfortably get well back home. This incentive was mainly developed for domestic tourism; however, the increase in the national security is a plus to motivate international trips as well. This program incentives residents and visitors to assist to more than 94 fests, 110 festivals, 46 ferias, 32 beauty pageants, 5 carnivals y 44 exposition and events every year.

²⁰ Taken from: “Colombia is passion”. In site online: <http://www.colombia.travel/en/international-tourist/colombia/colombia-is-passion>

Every year the presidency of the Republic with the collaboration of public entities like the Ministry of Tourism design the routes that will be escorted by the national police in order to visit some specific attraction depending on regional needs and promotion.

There are other initiatives that may be taken into account, like the membership to the World Tourism Organization in order to benefit from conventions and incentives, and the participation in important world ferias as the ANATO (Colombian Association of Travel Agencies and Tourism) where they invite countries to participate in different stands and that gives them an opportunity to show what they are and to improve its image.²¹

²¹ According to: "Turismo" In site online:
"http://feriasturisticas.diariomadrid.eu/___n1193450__Uribe_inaugura_feria_colombiana_de_turismo_Anato__dedicada_este_ano_a_Francia.html"

PART III: STRATEGIC PROPOSITION

3.1. Main threats for international tourism

WEAKNESS	STRENGTH
Lack of information about the touristic places	Member of the World Tourism Organization (UNWTO)
Social insecurity and violence	It has many human and natural resources
Poor infrastructure (transportation)	Government initiatives (Colombia is passion)
lack of formal education, training and expertise	
OPPORTUNITIES	THREAT
It is consider as an exotic destination/Position as 2010 destination.	Other countries are well positioned as main destinations.
Exchange rate is favorable for foreign visitors.	Inaccurate international perception

Based on Porter's book "competitive strategy" the SWOT analysis helps us to do an external analyze of the companies and the sectors by evaluating opportunities and threats. And also it includes an internal analysis of weakness and strengths. According to the chart there are two main threats that Colombia has to face, first the fact that other countries are well positioned as main destination, because not only in Europe or in Asian countries, but also in Latin America there are countries as Mexico and Argentina that have a well positioned image. Colombia has to continue to promote their flag products as beaches, ecotourism and capital cities in order to gain a higher market share.

Regarding the inaccurate international perception, the main fact is to promote good news on the media to let people know that Colombia is a safe and interesting destination. Things like updating the data bases, to create internet portals to give right information, to promote exchange programs with worldwide students to improve the perception letting people know a bit about this culture, will help the country to be seen as attractive.

3.2. INTERNATIONAL POSITIONING STRATEGIES

We already saw the main problems that the country has in the tourism industry, and now it is necessary to formulate some solutions that will boost the performance and the perception of the touristic sector in Colombia.

3.2.1 Violence And Insecurity Problems:

This is the main issue that Colombia has to deal with, because it has created the worst image of the country generating fear worldwide. Even though Colombia has done many efforts to attack aggressors and to increase the security on the streets, it is necessary to strengthen this aspect in order to improve the global perception.

1. Increase the security levels in the cities and zones with higher affluence of tourists: that means that the country needs to work together with the national police in order to design a plan of action to get a better coverage and to try to trace criminal gangs that attack visitors.
2. Promotion of pedagogic programs against weapons: Colombia has to keep promoting these kinds of programs that inspire criminals to give up war. It is a positive element to highlight because it doesn't only improve the quality of life internally, but it also improves the statistics of violence that are known around the world, and it starts to change the bad image of the country abroad.

3. Invest in education and offer better job opportunities: Colombia has to make a great effort to educate every year more people. A part of the taxes should be invested in improving the quality of education, in opening new schools and public universities to offer more opportunities to the lowest income population. Education motivates people to aspire for a better quality of life, and at the same time it gives them the possibility of achieve better qualified jobs, in that way, not everybody will have to find a job in the least qualified activities generating a excess of job offer, that at the end creates unemployment and in the future one of the consequence is the violence.
4. Use of international media links: internet is nowadays one of the main sources of information of the humanity. It shows the world the good as the bad things of every single place. That is why Colombia should beneficiate from this source and try to spread a renew idea of what Colombia is. The reinforcement of *Colombia is passion* for example, is one idea, because it promotes the country as a touristic destination, with potential for external investment and for business.

3.2.2. Lack of Formal Education, Training and Expertise:

In this point the main objective is to offer touristic formation and formalization. In Colombia there are many institutions in this field. There are university training, and technologic and technical trainings in hotel and tourism.

1. Quality certification: Colombia is now offering programs that promote the certification in sector technical standards in order to improve customer service. It should motivate hotels and the entire participant in this sector to get the certification in order to ensure a good quality service.
2. Enhance of new academic programs: Some education center are developing training in innovation and tourism development and tourist

information system. Colombia should support these programs and invest to offer public training and specialization because that helps to attract more customers.

3.3.3 Inadequate Infrastructure:

Colombia may have a high potential but it is missing enough investment in the infrastructure to attract foreign visitors.

1. Adequacy of streets and infrastructure: public investment is necessary to improve facades and streets in order to avoid that tourist find holes, ruins and uncovered routes. Also, regional planning should work with cleaning companies with the intention of maintaining cities clean and attractive.
2. Improvement of Access and transportation: Private enterprises should focus deeper in offering better and more extensive renting cars services. Colombia has a disorganized transportation system made up of taxis, urban buses and two or three wagon articulated buses. There is not a unified system and that can confuse the foreign visitors. That's why; renting a car may be a better and more comfortable solution for them.
3. Better hotel offer: even though Colombia is working hard to improve the quality of the hotels and the customer service, it should motivate international chains to invest in the sector, because it reactivates the economy as well as it positions the touristic places when they are backed up by international companies.
4. Adaptation of a free wifi system: create a platform that will allow visitors to use free internet on the street.

3.3.4 Lack of accurate information for foreign visitors

One of the main problems to attract foreign tourists is that they are not well aware about Colombia. They don't know that it is considered as an exotic destination, that is has an extensive offer of touristic activities and that it is not nearly as unsafe as it was 10 years ago.

1. Divulcation and touristic promotion: creation of more organized and complete internet portals where people can find interesting information about Colombia: interest facts, more popular touristic places, activities to do, hotels, restaurants, gastronomy, weather, etc.
2. Implementation of local information centers: usually visitors don't find enough information when they arrive to the Country; so it is necessary to design tourism offices where tourist could get information about touristic places and where they can get maps and instructions. Also it is necessary to set big posters of "You are here" in visible places to help visitors and to show them where the interest points are located.

CONCLUSIONS

According to the research project made about “How to improve the international attractiveness of the touristic sector in Colombia”, there are many things that can be said in order to make best use of the resources of the Colombian economy, with the intention of improving the touristic appealing of the international visitors.

First, we need to say that Colombia has a great potential to develop this industry gratefully. It has the natural resources and the human talent; but it needs to use a strategy of promotion and qualification. It requires creating data bases to give enough information to the foreign visitors prior to their arrival about the country profile, the touristic places, things to do, gastronomy and suggestions; and it has to set physical solutions for informational problems; like posters, touristic offices and internet availability. Also it has to have more social investment in public spaces and it has to work with the media to sell a better image internationally. Regarding the human talent, better specialization and professionalism in customer service is a must to develop the attractiveness of this sector.

Second, we can say that Cartagena and Bogotá are the two cities with the highest potential to grow and develop. In the last few years, they have been located in the two first places of the charts of destinations. It means that capital cities and sun and beach are the two main products attracting abroad customers; as well as the reception of international visitors through additional alternatives like the cruises, that is growing at a high speed level. Colombia has to motivate every year more and more touristic products in the places with higher affluence of visitors; it has to promote the culture, the history, the visit to natural reserves; everything that incentives a bigger expenditure from international tourists and that reactivates the local economies.

Third, after analyzing the information and comparing the results, we can see that the Amazon region doesn't appear in the chart of destinations; this is because Colombia has just started to promote this part of the country. But I think that the Amazon has a huge potential to be developed, because this is the biggest territory of the country, it occupies 40% of the land and it is almost inhabited. It counts with 9 natural parks and a huge biodiversity. Nowadays that the "green" tendency is starting to grow more and more people will like to have an encounter with nature; and Colombia could profit so well from this enormous virgin jungle.

Finally, we can say that Colombia needs to be very proactive in terms of tourism, because there are many countries that are already well recognized as touristic destination, and this country needs to fight against the poor international image in order to show that Colombia is an amazing country that is worth to visit and love.

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