

UNWTO/WTOT City Tourism Performance Research Report for Case Study “Bogotá”



Note: This document is a working paper

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Background

As part of the UNWTO-WTCF City Tourism Performance Research Survey, an instrument for evaluating city tourism performance in cities worldwide, data was collected and interviews were conducted in Bogotá, one of the 16 cities worldwide participating in this exercise.

The UNWTO-WTCF City Tourism Performance Research Survey includes *five key performance areas*: Destination Management, Economic Perspective, Social and Cultural Perspective, Environmental Perspective and Technology & New Business Models. Based on initial desk-based research and in consultation with Bogotá IDT (Instituto Distrital de Turismo), the tourism planning, management and marketing organization for Bogotá, two key performance areas were identified for further investigation for the case of Bogotá: (1) Destination Management and (2) Social and Cultural Perspective.

Data under each selected performance criteria were collected from official data sources at the city level. In addition, on-site interviews were conducted with Bogotá IDT (Instituto Distrital de Turismo), municipality officials and other tourism stakeholders to gain further understanding of the tourism performance, challenges and dynamics of the city. This report presents the findings from desk research data analysis and survey undertaken in Bogotá in the month of May 2017

I. Introduction to Bogotá

Bogotá is the largest city of Colombia and the main economic and industrial capital city of the country. It is its political, economic, administrative, industrial, artistic, cultural, creative, and sports center and stands out for its economic strength, financial maturity, attractiveness to global companies and quality of human capital. Bogotá is home to 1,423 multinational companies and has the largest number of universities and research centers of the country. Bogotá ranks 57nd on the AT Kearney 2016¹ Global Cities Index² and 52nd on the Global Cities Outlook³ and currently is an international growing meetings destination. *América Economía Intelligence*⁴ ranks Bogotá among the top 5 cities in Latin America for business in 2015 and 2016⁵.

Situated in the Eastern Cordillera of the Andes on a high plateau known as the Bogotá savanna, it is the third-highest capital in South America (after Quito and Sucre), at an average of 2,640 meters above the sea level. Actually, the current slogan for the city is Bogota: “2.600 meters closer to the stars”. The Eastern Hills frame the city from south to north. In the extreme south of Bogotá, the world's largest continuous paramo ecosystem can be found in the locality of Sumapaz. The western city limit is the Bogotá River. Bogotá has a subtropical highland climate with an average temperature of 14.5 °C. Dry and rainy seasons alternate throughout the year.

¹ A.T. Kearney Inc (2016), *Global cities 2016*. A.T.Kearney Inc. (online), available at: <https://www.atkearney.com/documents/10192/8178456/Global+Cities+2016.pdf/8139cd44-c760-4a93-ad7d-11c5d347451a> (25-08-2017)

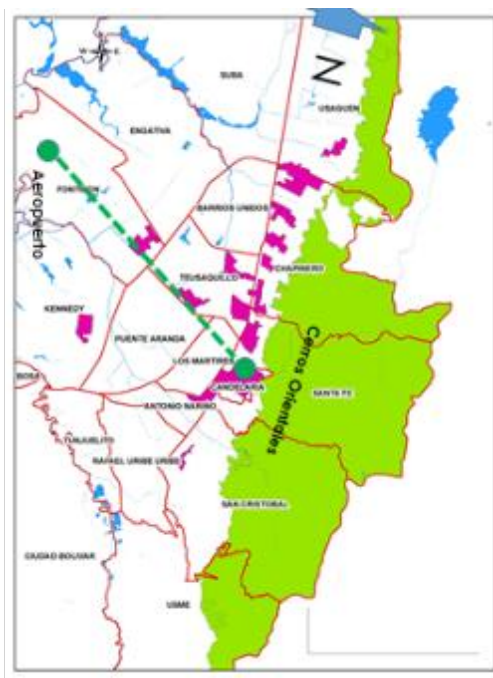
² The A.T. Kearney's Global Cities Index ranks 125 metropolitan areas according to 26 metrics across five dimensions: Business activity (30%), Human capital (30%), Information exchange (15%), Cultural experience (15%), Political engagement (10%).

³ The A.T. Kearney's Cities Outlook ranks 125 metropolitan areas according to their long term potential based on rate of change in 13 indicators across four dimensions: personal well-being (25%), economics (25%), innovation(25%), and governance(25%).

⁴ América Economía Intelligence (2016), *Mejores ciudades para hacer negocios en América Latina*. América Economía. (online), available at: [https://rankings.americaeconomia.com/mejores-ciudades-2016/\(20-07-2017\)](https://rankings.americaeconomia.com/mejores-ciudades-2016/(20-07-2017))

⁵ América Economía Intelligence uses a complex Urban Competitiveness Index (ICUR) to ranks cities according to eight dimensions: social and political (15%), economic performance and evolution (25%), business services (10%), CEO's services (10%), infrastructure and connectivity (10%), human resources (10%), environmental sustainability (5%) and brand power (15%).

Figure 1.1 Urban area of Bogotá



Source: Instituto Distrital de Turismo.

Subdivided into 20 administrative divisions or localities (*localidades*), the district of Bogotá has an area of 1,587 square kilometers and is the capital of the Cundinamarca Department. Bogotá accounts for 34% of total companies/businesses in Colombia and attracts about 35% of the total Foreign Direct Investment in the country. The Bogotá economy represents a quarter (25.7%) of Colombia's GDP and it is the seventh-largest city GDP in Latin America (about USD 99,746 million according to the Bogotá Chamber of Commerce⁶), being larger than the GDP of countries such as Costa Rica, Uruguay or Panamá. Due to the steady economic growth and business development in the last 15 years, it has become one of the most important business poles in Latin America being the 4th Latin American city attracting multinational companies in 2014 and registering one of the lowest unemployment and poverty rates in Colombia⁷.

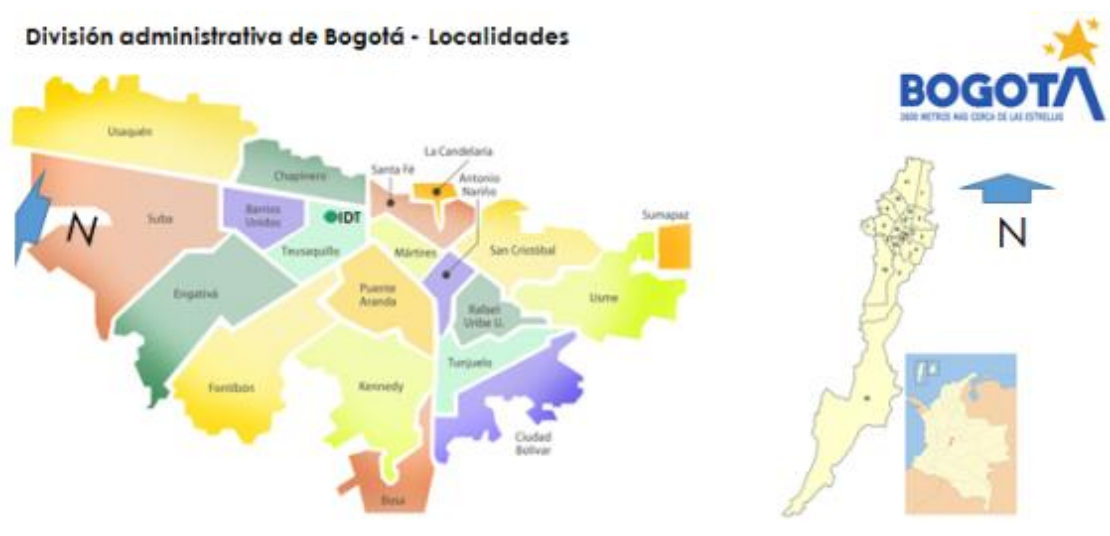
Bogotá is the largest and most populated city in Colombia with 8.1 million (16.4% of the Colombian total) and a population density of approximately 4,310 inhabitants per square kilometer. Even though 70% of the Bogotá district surface is rural (locality of Sumapaz), only 15,810 people are living in these rural areas. Demographically, 47.5% of the population is male

⁶ Cámara de Comercio de Bogotá (2014), *Posicionamiento Competitivo de Bogotá 2014*. Cámara de Comercio de Bogotá, Bogotá

⁷ Cámara de Comercio de Bogotá (2014), *Posicionamiento Competitivo de Bogotá 2014*. Cámara de Comercio de Bogotá, Bogotá

and 52.5% women. In Bogotá urbanization has been accelerated both because industrialization, expanding economy as well as due to political and social reasons such as economic, political and violence related migrations. *Localidades* of higher economic status are located in the north, close to the Eastern Hills while middle class inhabit the central, western and northwestern parts of the city and working-class *localidades* are located in the south. Bogotá's social strata divides the population in 6 levels (*estratos*) which have been extensively used by the government as a reference for public utilities tariffs, taxes, and to develop social welfare programs, statistical information and to some degree for the assignment of lands.

Figure 1.2 Administrative divisions (*localidades*) in the Bogotá district



Source: Instituto Distrital de Turismo.

Bogotá represents almost half (46.8%) of international inbound tourism in Colombia. Tourism is the second export industry of the country after oil (USD 5,688 million in 2016). It is continuously growing in a context of economic improvement and political pacification since 2002. Actually, it has been ranked as the 16th world fastest growing urban destination by the Global Destination Cities Index by MasterCard 2016⁸ and it has been awarded with various international recognitions, reports, and mentions as a revelation tourism destination in recent years⁹.

⁸ Mastercard (2016), *Global Destination Cities Index*. Mastercard. (online), available at: <https://newsroom.mastercard.com/wp-content/uploads/2016/09/FINAL-Global-Destination-Cities-Index-Report.pdf> (10-07-2017)

⁹ See, for instance, <https://www.bloomberg.com/news/features/2017-01-04/where-to-go-in-2017>, or <https://www.forbes.com/sites/forbestravelguide/2017/01/23/forbes-travel-guides-12-top-destinations-of-2017/#280b4a60522c>

The airport of the city, the El Dorado International Airport, has the largest volume of cargo transported in Latin America and is third in number of passengers¹⁰ (31 million in 2016¹¹). It has been a key factor for Bogotá's international attractiveness with 70% of international people arriving in Colombia entering through the El Dorado International Airport. There are 775 weekly frequencies on international routes connecting directly with 27 different countries and 45 destinations. This represents one of the largest international connectivity in Latin America¹². Growth in International Direct Air Connectivity is remarkable: in the last four years it has increased by 40%. Bogotá renewed Airport (2012) has been awarded by Skytrax as the Best Airport in South America for two years in a row, 2016 and 2017¹³. Bogota also has an extensive network of domestic routes with 39 destinations within the country representing 1.991 weekly frequencies. Finally, Bogotá is a hub for domestic and international bus routes. The terminal is the largest in the country. There are international services to Ecuador, Perú and Venezuela.

Despite the city's traffic congestion, transportation cost-effective, efficient and unique solutions have been enacted. Two bus systems are the main means of mass transit: the traditional system and the TransMilenio "express network". The traditional system is operated by several companies on normal streets and avenues and it has been gradually absorbed by the Massive Transportation Integrated System (SITP). TransMilenio has been deployed as a measure to compensate for the lack of a subway or rail system. It combines articulated buses that operate on dedicated bus roads (busways) and smaller buses (feeders) that bring passengers to the main grid from residential areas. Additionally, other mobility schemas are in place: car restrictions during peak hours called *Pico y placa* (rotating according to license plate digits) and the development of pedestrianization plans. In this vein, one important initiative regarding pedestrianization is 7th avenue from 26th street to 6th street that in recent years have been adapted and habilitated just for pedestrian. This is a very vibrant, lively area thru several important landmarks as the Golden Museum, the San Francisco church, Plaza de Bolívar, the

¹⁰ Cámara de Comercio de Bogotá (2014), *Posicionamiento Competitivo de Bogotá 2014*. Cámara de Comercio de Bogotá, Bogotá

¹¹ Candela, C. (2017), *Turismo extranjero y conectividad internacional en Bogotá a primer semestre de 2017*. Instituto Distrital de Turismo, Bogotá. Unpublished report.

¹² Candela, C. (2017), *Turismo extranjero y conectividad internacional en Bogotá a primer semestre de 2017*. Instituto Distrital de Turismo, Bogotá. Unpublished report.

¹³ <http://www.airlinequality.com/review-pages/top-10-airports/>

Cathedral, the Parliament building and the Nariño Palace, the government house in the Candelaria Sector.

Finally and interestingly, with 476 kilometers (as of 2017) of segregated lanes called *ciclorrutas*, Bogotá is the Latin America city with the most extensive and comprehensive network of bike paths. With more than 611,000 daily trips, Bogotá has also the highest number of bicycle users in Latin America. Daily bike trips represent 4.3% of total transportation trips in the city and 8% of citizens use bikes as their main mode of transportation. Additionally, on Sundays and Holydays, 116 kilometers of streets and main avenues close from 7am to 2pm (70 days a year) in order to facilitate biking for recreational purposes. Designated streets to do so are the *Ciclovías*. At the same time, stages are set up in city parks where aerobics instructors, yoga teachers and musicians lead people through various performances. Bogotá's weekly *Ciclovías* program was created about 40 years ago and nowadays is enjoyed by approximately 2 million people (about 30% of the population). Currently, Bogotá has the goal to position itself as one of the most important bike friendly cities in the world and to promote this condition as a tourism attraction.

Table 1.1 Transportation modes in Bogotá, 2015 (%)

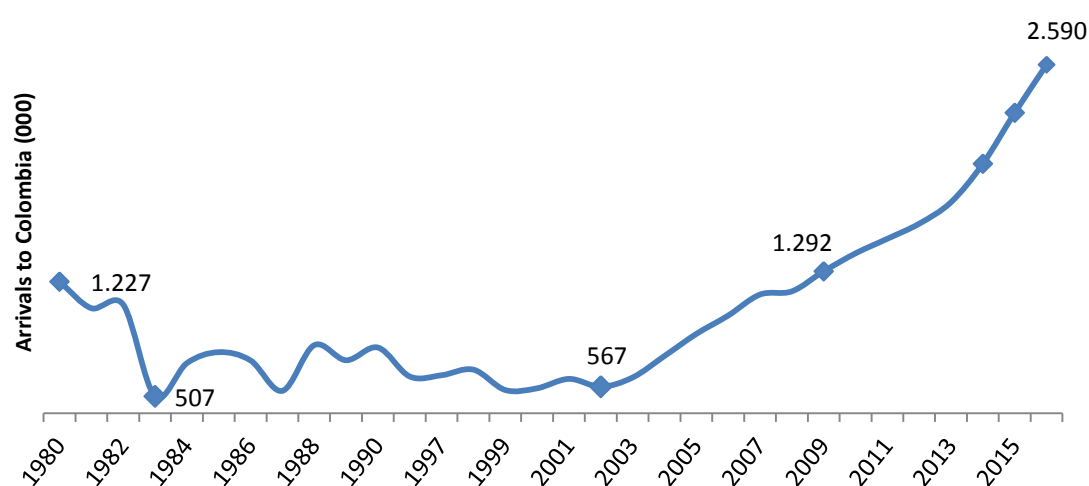
	Trips longer than 3 minutes	Trips longer than 15 minutes
Walking	31	21
Public Transportation (Bus)	38	45
Car	11	13
Moto	5	5
Taxi	5	5
Bike	4	5
Other	6	6

Source: Informe de Calidad de Vida de Bogotá 2016.

II. Bogotá Tourism Trends

Tourism in Colombia and in Bogotá is growing steadily and increasingly since the social and political pacification of the country. Accordingly, Colombia is currently among the top 10 main inbound tourism countries of Latin America with 2,593,070 million of arrivals in 2016 not including Colombian citizens living abroad. Due to drug trafficking, guerillas and general violence climate, Colombia –and Bogotá- were out of the World tourism scene for two decades but since 2002 the growth in International tourism is remarkable

Figura 2.1 Foreign Visitors Arrivals to Colombia 1980-2016 (thousands)



Source: Candela, C. (2017), *Turismo extranjero y conectividad internacional en Bogotá a primer semestre de 2017*. Instituto Distrital de Turismo, Bogotá. Unpublished report.

Tourism products overview

Bogotá has identified 514 attractions and resources including 438 cultural tangible resources, 21 cultural intangible resources, 32 natural resources and 23 event type resources. The main cultural center of the city is the La Candelaria, historic center of the city, with a concentration of museums, universities, heritage buildings, libraries such as the National Library of Colombia and the Biblioteca Luis Angel Arango and the Cultural Centre Gabriel García Marquez. The Teatro Colon (Opera House) has been named by BBC Travel as one of the 8 most breathtaking theatres in the World¹⁴.

¹⁴ <http://www.bbc.com/culture/story/20151118-eight-of-the-worlds-most-breathtaking-theatres>

Table 2.1 Bogotá tourism resources

Type	Subtype	Subtotal	Total
Cultural Tangible			438
	<i>Museums and collections</i>	57	
	<i>Art Galleries</i>	62	
	<i>Library Networks</i>	33	
	<i>Stage Theatres</i>	45	
	<i>Sports and attraction parks</i>	75	
	<i>Monuments</i>	166	
Cultural Intangible			21
Natural Heritage			32
Events			23
	<i>International Interest</i>	9	
	<i>National Interest</i>	8	
	<i>Local Interest</i>	6	
TOTAL			514

Source: Instituto Distrital de Turismo.

Accordingly with the cultural orientation of the city, the Bogotá Destination Management Organization, the Instituto Distrital de Turismo (IDT), considers culture as the main city attraction. In fact, Bogotá is a leading cultural city increasingly recognized worldwide as a hub for arts development. Currently, the 5 types of tourism products marketed by the IDT are:

- a. Cultural Tourism: Complementarily to the cultural tangible resources of the city, Bogotá holds a vibrant cultural dynamics. It has been awarded twice as Ibero America Cultural Capital by the *Unión of Ciudades Capitales de Iberoamérica* in 1991 and 2007¹⁵ In 2007 Bogotá was designated World Book Capital by UNESCO being the first Latin American city to receive this recognition¹⁶. Currently, Bogotá Book Fair is positioning as one of the most relevant in the region. Additionally, every two years Bogotá holds the Iberoamerican Theater Festival, one of the largest in the world. Finally, with more than 600 music live venues, in 2012 it was also designated as member of the UNESCO Creative Cities Network in the field of Music¹⁷ taking into account the complete public and private infrastructure, growth in creation and

¹⁵ <http://ciudadesiberoamericanas.org/galadornes-y-reconocimientos/capital-iberoamericana-de-la-cultura/>

¹⁶ Since 2001, cities designated as UNESCO World Book Capital undertake to promote books and reading and to organize activities over the year. <http://en.unesco.org/world-book-capital-city>

¹⁷ The Creative Cities Network is currently formed by 116 Members from 54 countries covering seven creative fields: Crafts & Folk Art, Design, Film, Gastronomy, Literature, Music and Media Arts. <http://en.unesco.org/creative-cities/home>

promotion of music and large music free festivals such as “Rock al Parque”. Cultural routes, film and music festivals, cultural resources and cultural products are shaping Bogotá as top Latin American cultural destination.

- b. Urban Tourism: Bogotá’s tourism attractions include some other live cultural related activities such as shopping, urban parks, bike paths, gastronomy (see below) night life and social events in public spaces including 62 shopping malls, 2,500 parks ranging from small neighborhood parks to large city parks as Parque Simón Bolívar, and the already introduced 476 kilometers of bike paths.
- c. Nature Tourism: More than the 70% of the Bogotá’s surface is rural or natural including the Eastern Hills, Sumapaz, the world's largest continuous paramo ecosystem¹⁸) with an extension of 333.420 Hectares in the rural part of the city and 15 wetlands¹⁹ in the urban part of the city.. Among the 32 natural identified attractions you find: Parque Sumapaz, Jardín Botánico José Celestino Mutis, Quebrada Las Delicias, Parque Entrenubes or Parque Mirador de Los Nevados. Natural heritage resources are currently being used to develop community based tourism oriented projects such as trekking in the Quebrada La Vieja or birdwatching in the Observatorio de Aves in the Santa María del Lago wetlands of the city run by the Fundación Humedales Bogotá.
- d. Gastronomy Tourism: There is a large number of restaurants in Bogotá that serve typical and international food converting the city in a world class gastronomy destination. Author’s cuisine is also booming in Bogotá. Parque de la 93, Usaquén, Zona T, The G Zone in the Gourmet sector at the 60 street, La Macarena, La

¹⁸ A paramo (moorlands) is a variety of high mountain alpine tundra ecosystem very special and fragile rich in flora and fauna much of them endemic placed in the northern Andes of South America and adjacent southern Central America. The paramo is found between 3,400 and 5,000 meters of altitude above the continuous forest line yet below the permanent snowline. This ecosystem also work as regulator for hydrological resources and as a “factory of water”. In the case of Bogotá, it provides water for around 15 million people, for the capital district and the neighboring region.

¹⁹ According to the Ramsar Convention on Wetlands, www.ramsar.org “...wetlands are areas of marsh, fen, peatland or water, whether natural or artificial, permanent or temporary, with water that is static or flowing, fresh, brackish or salt, including areas of marine water the depth of which at low tide does not exceed six meters”. “Wetlands are vital for human survival. They are among the world’s most productive environments; cradles of biological diversity that provide the water and productivity upon which countless species of plants and animals depend for survival.”

Candelaria and the International Centre are the consolidated restaurant and culinary sectors of the city. 5 city restaurants are among The World 50 Best Restaurants in Latin America. Complementarily to the restaurants supply, the IDT is also developing the “Vamos a la Plaza” program, a tourism initiative with the aim to include the food marketplaces as tourism attractions adapting and remodeling infrastructure and equipment and offering training to vendors.

- e. MICE and business tourism: Economic growth and business development have lead Bogotá to be one of the top business capital cities in Latin America. Bogotá is the 1st MICE destination in Colombia and, with 45 events registered, the 8th in Latin America according to ICCA ranking for 2016 (59 in the world ranking)²⁰. In 2016 Bogotá was accepted by the Best Cities Global Alliance, an organization with 12 global cities with the best standards for international events organization²¹. Towards the end of 2017, Agora Convention Center is going to be inaugurated. This is a state of the art infrastructure with facilities and technology for big international events (4.000 pax) with an area of 64.883 Square meters, with over 18 meetings rooms with different distributions and capacities. The partners of this project are the Bogota Chamber of Commerce, the international business and exhibition center – Corferias-, the Bogota City Administration and the national Government through the National Tourism Fund –Fontur-.

Tourism services structure

Bogotá has a total of 2,682 operating registered tourism companies in 2017. 48.6% of them are located in 3 of the Bogotá's *localidades* (Chapinero, Usaquén and Teusaquillo). These 3 *localidades* also concentrate the 54.4% of the guest accommodations. With La Candelaria and Santa Fe, these 5 *localidades* gather the 73.2% of the total accommodation of the city of Bogotá.

²⁰ International Congress and Convention Association (2016), ICCA Statistics Report. ICCA. (online) Available at: <https://www.iccaworld.org/knowledge/benefit.cfm?benefitid=4036> (20-08-2017)

²¹ <http://www.bestcities.net/>

Table 2.2 Bogotá tourism services, 2017

Type	Total	%
Travel Agencies	1,194	44.5
Guest Accommodations	579	21.6
Restaurants	405	15.1
Conference operators	116	5.1
Tourism representatives	136	5.0
Tour guides	135	4.3
Terrestrial transportation companies	52	1.9
Rent a car	31	1.3
Other	34	1.2
TOTAL	2,682	100

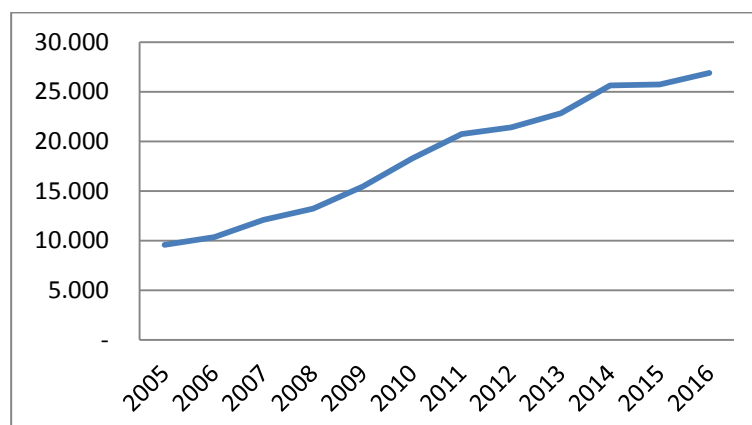
Source: Ministerio de Comercio, Industria y Turismo, Colombia

According to the Colombian Ministerio de Comercio, Industria y Turismo, in 2017 most of guest rooms accommodations are in hotels (84'5%). 3.3% are in hostels, 7.2% in hotel-apartments and 3.7% in tourist apartments. They sum 27,655 rooms²². AirBnB listings include about 6,000 additional beds in May 2017.

Rooms accommodation supply has grown dramatically during the last 15 years thanks to tax investment incentives provided by the Colombian government. The main benefit has been a revenue tax exemption during 30 years to be applied to new, renovated or extended hotel investment between 2003 and 2017. Figure 2.3 shows the guest accommodation room offer evolution since 2005 according to data provided by the Colombian Ministerio de Comercio, Industria y Turismo. Currently most of the international brands such as Hilton, Hyatt, Marriot, Holiday Inn, Best Western, Sheraton, Ibis, Radisson, Sofitel, Tryp, Four Seasons or Wyndham have properties in Bogotá counting around the 30% of the hotel rooms supply (42 hotels are owned or operated by international hotel chain companies). 40 hotels have more than 100 rooms and 18 more than 200.

²² Alcaldía Mayor de Bogotá (2016), *Censo de establecimientos de alojamiento y hospedaje 2015*. Bogotá.

Figure 2.2 Guest accommodation room offer growth in Bogotá (2005-2016, all types of accommodation)



Source: Ministerio de Comercio, Industria y Turismo, Colombia

Key international and domestic markets performance

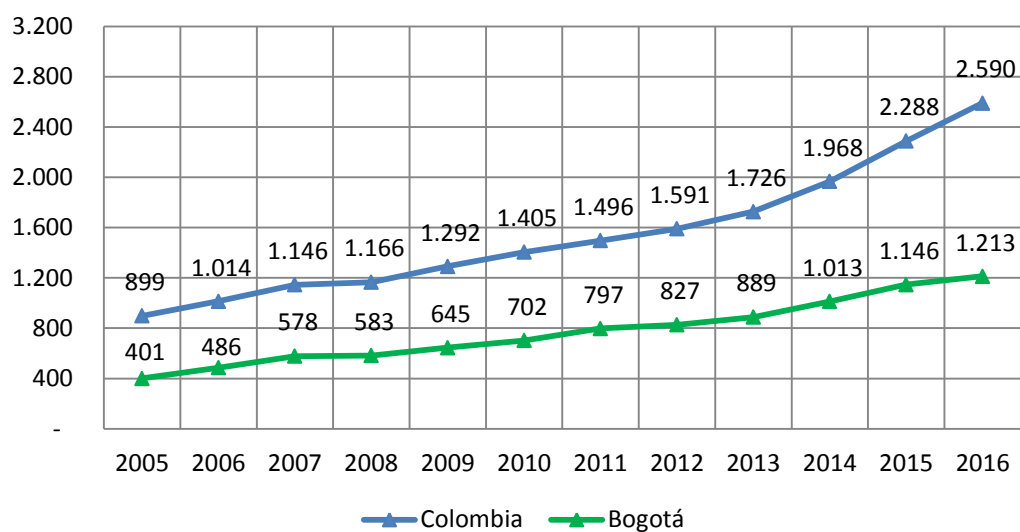
Bogotá is the main Colombian tourism destination. In 2016, 6,451,530²³ domestic tourists and 1,212,843²⁴ international tourists visited the city.

While the global international tourism grew to an average annual rate of 4.0% in the last ten years (2006-2016), in Colombia it grew at 10.2% and in Bogotá at 10.7% annual average rate in the same period. Due of this evolution, foreign tourism in Bogotá have multiplied by a factor of 2,5 between 2005 and 2016. In 2016 practically 46.8% of the foreign travelers arriving in the country reported Bogotá as their main destination followed to considerable distance by Cartagena with 14.1 % and Medellín with 12.8 %. The main inbound markets in 2016 were United States (16.6 %), Venezuela (13.6 %) and México (8.3). The fastest growing inbound markets in the last five years have been: The Netherlands, Germany, Panama, Mexico and Chile with average annual growth rates above 15%. In 2016 higher increases (over 20%) were from Panamá, Brazil and The Netherlands.

²³ Domestic arrivals data are from the Observatory of Tourism of the Instituto Distrital de Turismo

²⁴ International arrivals data are from Migración Colombia.

Figure 2.3 International tourist arrivals to Colombia and Bogotá (2005-16, in thousands)



Source: Candela, C. (2017), *Turismo extranjero y conectividad internacional en Bogotá a primer semestre de 2017*. Instituto Distrital de Turismo, Bogotá. Unpublished report.

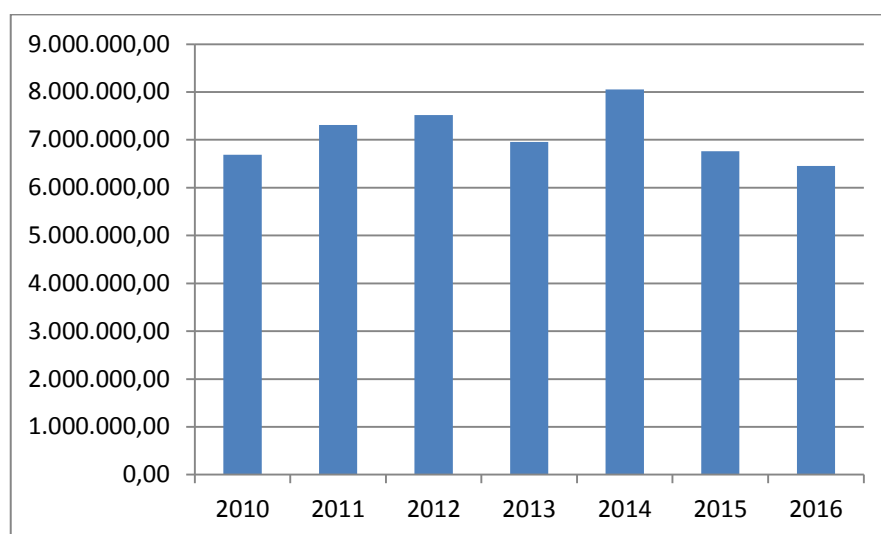
Table 2.3 Share of international tourist arrivals to Bogotá by origin (2016, in %)

Country	2016	Change 2016/2015
USA	16.6	3.2
Venezuela	13.6	-5.7
México	8.3	4.5
Brazil	5.8	22.5
Ecuador	5.7	0.8
Peru	5.6	-2.4
Spain	5.1	3.2
Argentina	4.6	11.5
Chile	4.0	7.3
Germany	3.0	2.0
France	2.8	12.5
Panamá	2.7	38.4
United Kingdom	2.0	9.2
Canada	1.7	7.8
Netherlands	1.5	21.4
Other	20.1	9.0

Source: Candela, C. (2017), *Turismo extranjero y conectividad internacional en Bogotá a primer semestre de 2017*. Instituto Distrital de Turismo, Bogotá. Unpublished report.

Regarding the domestic tourism, Figure 2.3 illustrates the trend observed since 2010. In 2016, 49.9 % of the domestic tourists came from neighboring departments to Bogotá including the surrounding Cundinamarca's department (to which the city belongs) as well as Tolima and Antioquia.

Figure 2.4 Domestic tourist arrivals to Bogotá (2010-16)



Source: Observatorio de Turismo. Instituto Distrital de Turismo.

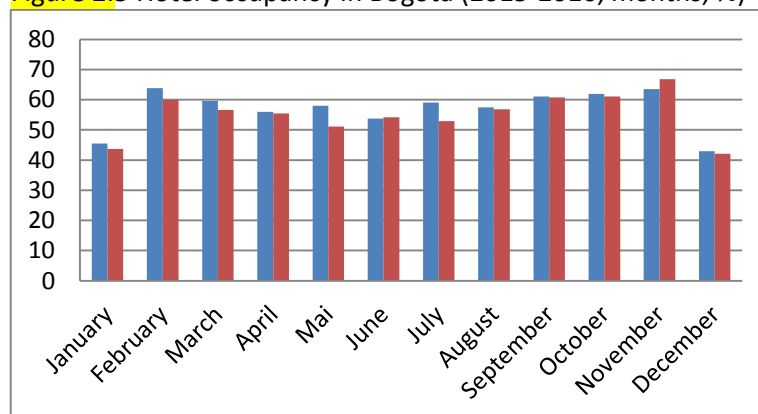
Table 2.4 Share of domestic tourist arrivals to Bogotá by origin (2000-16, in %)

Department	2010	2012	2014	2016
Tolima	11.8	12.4	18.2	19.6
Cundinamarca	18.2	17.1	15.3	16.3
Antioquia	7.6	7.2	7.6	14.0
Valle	8.6	6.2	11.6	5.5
Huila	6.4	6.2	9.5	5.5
Meta	11.2	11.1	3.6	5.4
Santander	5.6	5.0	3.4	5.2
Bocaya	8.9	9.7	2.7	4.5
Other	21.8	25.0	28.0	24.1

Source: Observatorio de Turismo. Instituto Distrital de Turismo.

During the last two years hotel occupation has been lower than 50 % in December and January and superior to 60% in February, September, October and November. Such variations are due to the seasonality of the tourist activity in the city. Just a third (34%) of international tourists and 11% of domestic tourists stays in hotels.

Figure 2.5 Hotel occupancy in Bogotá (2015-2016, months, %)



Source: Observatorio de Turismo. Instituto Distrital de Turismo.

According to the Observatory of Tourism data, for domestic tourists the principal motivation of tourists in Bogotá is "visit relatives and friends". "Business/work" is the third motive. Vacation/recreation is the main purpose of trip for international tourists in Bogota, followed by Business/work.

Table 2.5 Domestic tourism motivations for visiting Bogotá (2016, in %)

Domestic

Motivations	2016
VFR	39.1
Business/Work	21.4
Vacation/Recreation	15.6
Medical services	11.6
Events	3.2
Others	9.1

Source: Observatorio de Turismo. Instituto Distrital de Turismo.

Table 2.6 International tourism motivations for visiting Bogotá (2016, in %)

International

Motivations	2016
Business/Work	21.3
Vacation/Recreation	60.0
Events	6.1
Others	12.6

Source: Candela, C. (2017), *Turismo extranjero y conectividad internacional en Bogotá a primer semestre de 2017*. Instituto Distrital de Turismo, Bogotá. Unpublished report.

According to complementary information of the Observatory of Tourism of the Instituto Distrital de Turismo, the "activities" and "attractions" of the city are the main attractors for visiting Bogotá both for domestic and international tourists. "Shopping", "Night life" and

"Language" are less cited, being these latent opportunities and niches that are still to be exploited.

As for the way as the tourists found out on Bogotá, the principal one is "family and friends" with 43.6%. "I already knew the city" is the second way, whereas thirdly there is the "Internet". This is a position given basically by the international tourists. A high percentage of tourists are not visiting tourist attractions (near to the two third parts: 61.2%). In case of domestic tourists the figure rises furthermore up to 75.7 %.

III. Bogotá Tourism performance Research Survey Findings

Table3.1. Bogota's Tourism Performance Research Survey Findings Summary

Objectives	Performance criteria	
A1. Destination growth strategy	• Existence of a DMO at the destination	Yes
	• Clear vision and governance structure for destination in place	Yes
	• Sustainable tourism policy and regulations within the overall development strategy of the city	Yes
	• Differentiation of the destination (USP and/or UEP)	Yes
	• Public and private sectors commitment/involvement	Some
	• Collaboration with the stakeholders within and across sectors	Vision
	• Regular update of the strategy & action plan	Yes, every 4 years
	• Performance management tools in place	Some
A2. Visitor satisfaction	• Repeat visitation (within 5 years)/recommendation	Some
	• Analysis of the visitor satisfaction with different elements of destination	Some
	• Analysis of the visitor satisfaction with their overall experience at the destination	Some

A. Destination Management

A.1 Destination Growth Strategy

Governance/management organization

Tourism in Bogotá is managed by the Instituto Distrital de Turismo (IDT), a public tourism marketing and management organization chartered by the district government in 2007, whose core functions include destination planning and policy making, tourism regulations, tourism product development, tourism awareness dissemination, tourism capacity building, tourism marketing, visitor services and tourism monitoring. The IDT has a specific legal status, administrative and financial autonomy and own assets assigned to the District Department of Economic Development. The principal aim of the IDT is “to stimulate the economic development of Bogotá across the promotion of the tourism activity of the City and to achieve

the best conditions of competitiveness and sustainability of the destination²⁵. It is the will of the Bogotá District Municipality to convert the IDT in a leading and innovative organization able to transform Bogotá in the first sustainable and accessible destination of Latin America in 2026 through the deployment of policies, plans and projects and with a clear contribution to the economic development, trust and citizens and visitor happiness²⁶. The District entities participating in the IDT are the following:

- Mayor's Office
- General Secretary
 - ❖ Communications Office
 - ❖ International Relations Office
- Secretary of Economic Development
- Secretary of Planning
- Secretary of Governance
- Secretary of Culture Recreation and Sports
 - ❖ Institute for Recreation and Sports
 - ❖ Institute for Arts (IDARTES)
 - ❖ Institute for Cultural Heritage
- Secretary of Environment
- Secretary of Mobility
- Localities Zonal (Local) Mayors

Additionally, private stakeholders collaborate with the IDT even though they do not have budgetary participation. Current cooperating organizations in 2017 are industry associations such as Cotelco (hotels), Anato (travel agents) Asobares (bars), Acodrés (gastronomy), Acoltés (transportation), Acolap (attractions), Fenalco (commerce) and other organizations such as Invest in Bogotá, Greater Bogotá Convention Bureau, Bogotá Chamber of Commerce, Fontur, Procolombia and Gobernación de Cundinamarca. Additional collaborating organizations are stakeholders clusters such as MICE and Business Tourism Cluster, Gastronomy Cluster, Music Cluster, Clothing Cluster, Historic Centre Candelaria District Cluster, community and neighborhood associations, the Tourism Police, Migración Colombia and the Bogotá's airport private concessionary company.

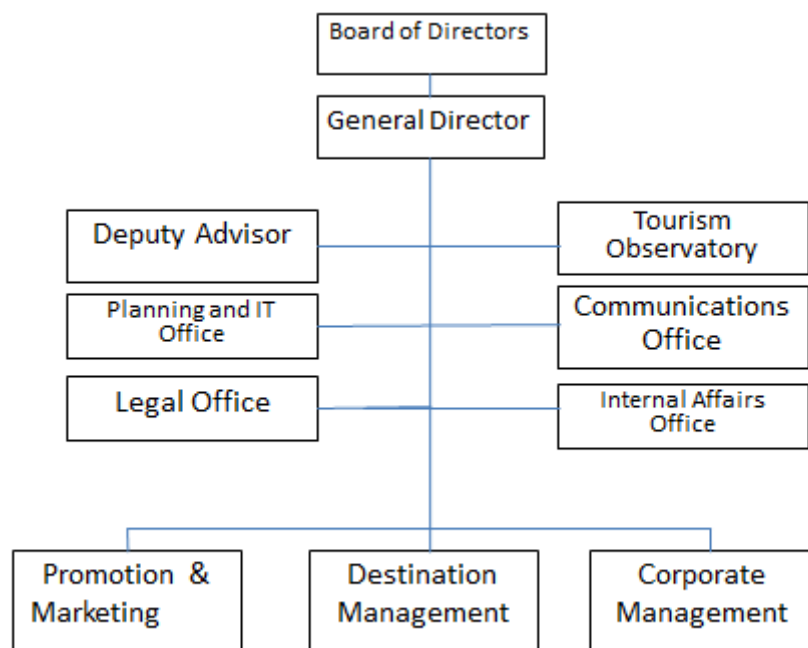
The IDT activities are approved by a Board of Directors. It is constituted by the City Mayor, or his delegate which is The District Secretary of Economic Development who lead the Board, the District Secretary of Culture, Recreation and Sports or his delegate, the District Secretary of

²⁵ Secretaría Distrital de Desarrollo Económico, Instituto Distrital de Turismo y Centro Interdisciplinario de Estudios para el Desarrollo, Universidad de los Andes (2017), *Lineamientos de la Política, el Plan Estratégico y el Plan de Acción para el sector Turismo en Bogotá 2017-2020*. Bogotá.

²⁶ Secretaría Distrital de Desarrollo Económico, Instituto Distrital de Turismo y Centro Interdisciplinario de Estudios para el Desarrollo, Universidad de los Andes (2017), *Lineamientos de la Política, el Plan Estratégico y el Plan de Acción para el sector Turismo en Bogotá 2017-2020*. Bogotá.

Planning or his delegate, the General Director of the Instituto Distrital de Turismo (he attends all Board of Directors Sessions with voice but not vote and also acts as Secretary of the Board) and two representatives from the private sector. The General Director is in charge of the development and achievement of the objectives decided by the Board of Directors. In 2017 the IDT has a staff of s 30 direct (payroll) employees and about 120 additional collaborators and manages a total budget of EUR 5 million. This budget is fully provided by the Colombian government. The organization consists of 2 main sections (*áreas misionales*): Destination Management and Marketing and Promotion, an administration area (Corporate Management) and 6 internal services areas: Planning and IT, Communication, Legal, Internal Affairs, Advising and Observatory.

Figure 3.1 IDT Organigram



Source: Instituto Distrital de Turismo.

In the last 10 years the IDT has undertaken several innovative and creative initiatives to benefit the industry, visitors, the community and the city as a whole. The IDT is at the forefront of innovative community based tourism product development, sustainable, inclusive and responsible tourism initiatives, resources environmental protection and preservation and the integration of tourism policies within the urban strategy. More particularly, the Destination Management section at the IDT has been in charge of the following:

1. Tourism Product Development: IDT develops tourism products related to Urban, Cultural, Natural, Gastronomy, and MICE Markets and provide planning, management, community engagement, networking, brochures, regulations definition and advisement to private and public stakeholders involved in each initiative.
2. Tourism Culture Enhancement programs: IDT focusses on promoting tourism as a strategic activity among local population educating about the economic, social and environmental importance of tourism in the city, boosting a warm hosting of visitors through high quality contact moments with guests, disseminating the principles of the UNWTO Global Code of Ethics for Tourism²⁷ and stimulating sustainable tourism practices among locals.
3. Tourism Competitiveness: The strategy of the IDT related to tourism competitiveness is to lead joint actions with different actors in order to promote tourism development at local level. Four local round tables for tourist conciliation are currently in place. They replace the round tables for tourist competitiveness created in 2007 in the 20 *localidades* of Bogotá. The aim of the current four local round tables is to facilitate the active participation of all the actors and prevent some difficulties derived from the fragmentation of the management process. The four existing round tables are both geographically and product wise defined :
 - Eastern Hills Round Table: cultural, gastronomy, urban and nature tourism
 - Rural Zone Round Table: nature and rural tourism
 - Río Bogotá Round Table: nature (wetlands and Bogotá river) and urban tourism (colonial squares and indigenous communities)
 - Production Centre Round Table: urban, business and MICE tourism

The IDT Tourism Marketing section focuses on promoting the city's iconic attractions and offerings as well as on the lesser explored sites to both domestic and international markets. To do so, IDT participates in a number of trade fairs and exhibitions worldwide and in selected target markets. Tourism marketing and promotion is undertaken within the framework of the Bogotá Strategic and Tourism Action Plan, 2017-2020²⁸. Additionally, at the city level, the IDT

²⁷ UNWTO (2001), Global Code of Ethics for Tourism. UNWTO, Madrid. (online), available at: <http://cf.cdn.unwto.org/sites/all/files/docpdf/gcetbrochureglobalcodeen.pdf> (20-07-2017)

²⁸ Secretaría Distrital de Desarrollo Económico, Instituto Distrital de Turismo y Centro Interdisciplinario de Estudios para el Desarrollo, Universidad de los Andes (2017), *Lineamientos de la Política, el Plan Estratégico y el Plan de Acción para el sector Turismo en Bogotá 2017-2020*. Bogotá.

has 9 Visitor Information Centers situated at strategic locations across the city (Aeropuerto El Dorado, Terminal de Transporte Sur, Terminal de Transporte Salitre, Corferias, Centro Histórico, Centro Internacional, Parque de la Independencia, Monserrate, Centro Comercial Unicentro) in order to offer visitors local information as well as to provide products such as city maps and visitor services. 161,141 visitors used the visitor information centers in 2016 and 7,273 enjoyed the city center guided pedestrian routes offered by the Visitor Information Centers. 53% of the visitors in 2016 were international tourists, 24% of domestic origin and 23% citizen of Bogotá eager to know more about their city.

Planning for tourism development

Bogotá has a strong policy for the development of tourism as a tool for job creation, entrepreneurship and economic growth. The vision of the Bogotá Strategic and Action Tourism Plan 2017-2020 is:

“To strengthen the identity of Bogotá as tourism destination of national and global scope, offering to the tourist and to the visitor cultural creative, innovative, authentic and diverse experiences, as a knowledge city, in a heritage memorable environment and with a management oriented towards the happiness of its inhabitants and of the tourists who visit it”.

At national level, the current Bogotá Strategic and Action Tourism Plan 2017-2020 is aligned with the Colombian Government Tourism Plan 2014-2018 “Tourism as a Tool for Peace”²⁹. The main objective of this plan is to position Colombia as a sustainable multicultural, megadiverse and competitive tourism destination. The four pillars of the plan are regional development, competitive connectivity, promotion and efficient management and governance.

The current Bogotá Strategic and Action Tourism Plan 2017-2020 has an antecedent in the Master Plan of Tourism³⁰ adopted by the District with the approval of the Decree 664 in 2011

²⁹ Ministerio de Comercio, Industria y Turismo y Departamento Nacional de Planeación (2014), *Plan sectorial de Turismo, 2014-2018. “Turismo para la construcción de la paz”*. Bogotá. (online), available at: http://www.mincit.gov.co/minturismo/loader.php?lServicio=Documentos&lFuncion=verPdf&id=71713&name=PLAN_SECTORIAL_DE_TURISMO_2014-2018_16_DE_SEPTIEMBRE_DE_2014.pdf&prefijo=file (17-07-2017)

³⁰ Alcaldía Mayor de Bogotá (2011), *Plan Maestro de Turismo para Bogotá DC*. Decreto Distrital 664 de 2011. Bogotá

and is aligned with the current Bogotá District Tourism Policy 2017-2030³¹. The Plan also follows indications from the Economic, Social, Environmental and Infrastructural Development Plan for Bogotá 2016-2020 “*Bogotá mejor para todos*” approved in 2016³².

Finally, the Bogotá tourism plan also takes in consideration the Bogotá Urban and Regional Development Plan (*Plan de Ordenamiento Territorial -POT*) approved in 2000 and the following amendments approved in 2004 (Decree 190)³³. This plan is currently under a revision process with the active participation and involvement of the IDT experts. The forthcoming POT will define the urban development strategy for the capital district of Bogotá from the social, economic, environmental, spatial and infrastructural perspectives. IDT representatives consider that it will recognize tourism and tourism related activities as key for the economic growth and cultural development of the city. The Plan also takes in consideration indications from other planning schemes related to rural areas, the Eastern Hills and the neighboring departments.

The Bogotá Strategic and Action Tourism Plan 2017-2020³⁴ has been designed in cooperation with the Universidad de Los Andes (one of the leading private universities in Colombia) and outlines guiding principles, strategic areas and key actions and projects for tourism development in the city in the context of the emerging global trends and local urban strategies and the opportunities and challenges that are shaping the evolution of the tourism activity. It will be updated every 4 years. Importantly, the IDT has had a collaborative approach to tourism policy development with inputs sought within and across diverse tourism sectors, government organizations as well as local community representatives. It is also of utmost importance to indicate that the plan is an operational tool for the forthcoming 4 years but it

³¹ Alcaldía Mayor de Bogotá (2016), Proyecto de Acuerdo 520 de 2016 por el cual se ordena actualizar la política distrital de turismo en Bogotá-Región, se dictan otras disposiciones y se deroga en Acuerdo 305 de 2007. Bogotá (online), available at: <http://www.alcaldiabogota.gov.co/sisjur/normas/Norma1.jsp?i=67373> (20-08-2017)

³² Alcaldía Mayor de Bogotá y Secretaría Distrital de Planeación (2016), Plan Distrital de Desarrollo 2016-2020. “Bogotá mejor para todos”. Bogotá. (online), available at: http://www.sdp.gov.co/portal/page/portal/PortalSDP/PlanDistritalDesarrollo/Documentos/20160429_proyecto_PD D.pdf (30-06-2017)

³³ Alcaldía Mayor de Bogotá (2004), Decreto 190 de 2004 (Derogado por el art. 565, Decreto Distrital 364 de 2013) por medio del cual se compilan las disposiciones contenidas en los Decretos Distritales 619 de 2000 y 469 de 2003. Bogotá. (online), available at: <http://www.alcaldiabogota.gov.co/sisjur/normas/Norma1.jsp?i=13935> (20-08-2017)

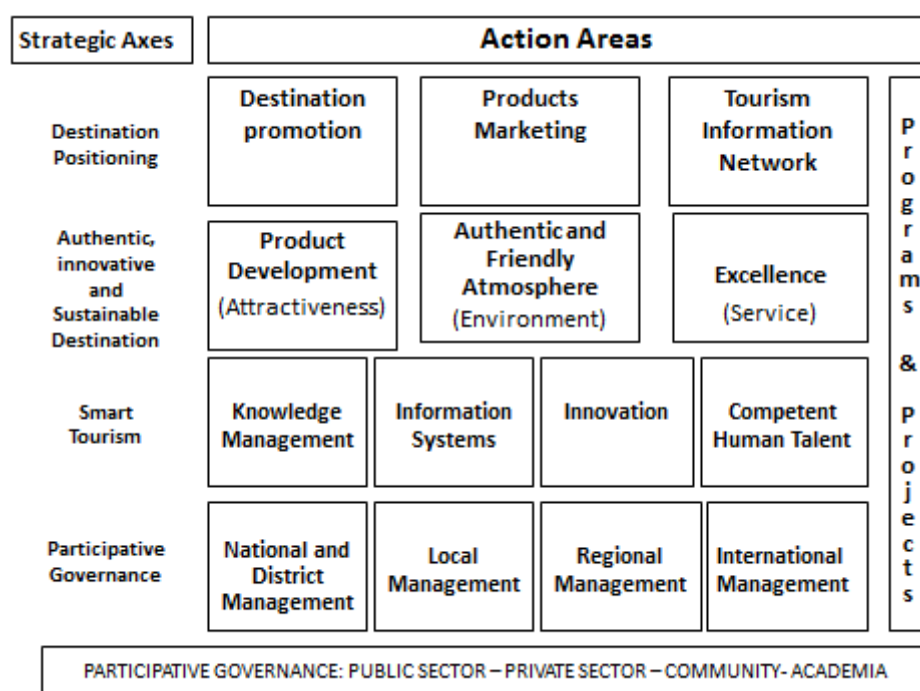
³⁴ Secretaría Distrital de Desarrollo Económico, Instituto Distrital de Turismo y Centro Interdisciplinario de Estudios para el Desarrollo, Universidad de los Andes (2017), *Lineamientos de la Política, el Plan Estratégico y el Plan de Acción para el sector Turismo en Bogotá 2017-2020*. Bogotá.

has been designed under a medium-long term framework vision for tourism in the Bogotá city and region covering the 2017-2038.

The Bogotá Strategic and Action Tourism Plan 2017-2020 distinguishes 3 geographical areas of application: the District area of Bogotá (including both its urban and rural environments, the surrounding area of Bogotá (including the Eastern Hills and the Bogotá paramo ecosystem in a maximum range of 2 hours), and the Bogotá Region including some municipalities located in neighboring departments such as Meta, Boyacá, Tolima as well as Cundinamarca in a range of distance between 2 and 4 hours from the capital city. At the city level, the plan reviews the 19 Tourist Interest Zones (ZIT) defined by the Master Plan of Tourism in 2011 according with their density and characteristics of their tourism attractions, public space availability and tourism facilities and outlines perceptions, opportunities and challenges for the 20 neighborhoods (*localidades*) that conform the Bogotá district at local level.

The Bogotá Strategic and Action Tourism Plan 2017-2020 vision is to consolidate the city as the leading and creative tourist destination of South America taking advantage of the richness and diversity of the city's heritage and cultural practices through the development of innovative, sustainable and excellent products, experiences and services. The final intangible objective is to improve the happiness of local residents and visitors to the city. To do so, the plan defines the strategic axes (participative governance, smart tourism, authenticity, innovation and sustainability, and destination positioning) and the related areas of action (see Figure 3.2) A measurable objective is to increase the number of international tourism arrivals to Bogotá in 2020 to 2.4 million. This means a 12% annual growth rate since 2015.

Figure 3.2 The Bogotá Strategic and Action Tourism Plan 2017-2020



Source: Instituto Distrital de Turismo.

Measures to ensure sustainability

The IDT has a strong sustainable tourism policy and regulations within the overall development strategy for the city. In fact, Bogotá is in the forefront of sustainable policy implementation in Latin America. The IDT, as governing entity of the tourist development in Bogotá, formulated in 2008 the District Tourism Policy adopted by means of the Decree 327/2008³⁵, incorporating sustainability as a founding principle of its strategy. The aim of this policy is:

"Create a model of sustainable and competitive tourism development for the city and his zone of influence – the Capital region - offering to the industry an institutional and transversal support according with his own characteristics, advocating for the positioning of the city in the domestic and international markets as an attractive destination under criteria of differentiation, specialization and suitable management, of such form that allows to increase the levels of satisfaction of the current visitor, to increase the travelers' volume and his expense in the city, affecting positively the

³⁵ Alcaldía Mayor de Bogotá (2004), Decreto 327 de 208 por el cual se adopta la Política Distrital de Turismo para Bogotá, D.C. y su zona de influencia Región Capital. Bogotá. (online), available at <http://www.alcaldiabogota.gov.co/sisjur/normas/Norma1.jsp?i=33044> (20-08-2017)

economic development by means of the generation of collective wealth and the distribution of the revenue".³⁶

Also in this vein, the medium-long term District Tourism Policy vision proposed for the period 2017-2038 raises as strategic aim to position Bogotá as an "authentic, innovative and sustainable destination" and, as a consequence, the IDT supports tourism service providers with personalized consultancy for the implementation of the NTS-TS and spreads between them free projects of certification offered by the Ministry of Trade, Industry and Tourism. The IDT considers sustainability as a key point for the improvement of the quality and competitiveness of tourism in Bogotá.

From a practical perspective, the IDT has adopted the sustainability vision and procedures established by the Sectorial Unit of Normalization in Sustainable Tourism of the Universidad Externado de Colombia (one of the leading private universities in Colombia) defining two areas of action:

- Design and diffusion of the technical sectorial procedures of sustainable tourism, NTS-TS for destinations.
- Design and diffusion of the technical sectorial procedures of sustainable tourism NTS-TS for tourist services providers.

The IDT has also led alliances with other entities and institutions as the University Antonio Nariño, the Ministry of Trade, Industry and Tourism, FONTUR -Tourism National Fund, among others, managing resources for the implementation of the NTS-TS in the private sector and being Bogotá the first city in the country in having tourist services providers certified under the NTS-TS since the year 2010.

Nowadays, the City of Bogotá has 269 tourism service providers certified in tourist quality, of which 152 have been certified across the fulfillment of the procedure NTS-TS:

³⁶ Secretaría Distrital de Desarrollo Económico, Instituto Distrital de Turismo y Centro Interdisciplinario de Estudios para el Desarrollo, Universidad de los Andes (2017), *Lineamientos de la Política, el Plan Estratégico y el Plan de Acción para el sector Turismo en Bogotá 2017-2020*. Bogotá.

Table 3.2 Tourism service providers certified with the NTS-TS procedure

Sustainable Accommodations	Sustainable Restaurants	Sustainable Travel agents	Sustainable Terrestrial transportation	Events, Congresses, Fairs and conventions venues	TOTAL
45	9	92	5	1	152

Source: Instituto Distrital de Turismo.

Only a small number of tourism service providers have chosen this certification. This is mainly due to difficulties in the implementation of requirements (the sustainability management system) and to the exigency of the fulfillment of 100 % of them from the first time that they decide to apply them. In addition, the annual cost to maintain the certification is another limitation because it is about EUR 425 for small and medium companies.

A summary of sustainability requirements established in the NTS-TS besides the legal requirements is listed below:

- **Sustainability management system:** Sustainability policy, Leadership, Identification and valuation of environmental, sociocultural and economic impacts, Sustainability Programs including Aims, Goals, Indicators, Activities, Timings of execution and Persons in charge, Programs of information and awareness (good practices of sustainability), Training, Documentation, Monitoring and follow-up, Continuous improvement.
- **Environmental requirements:** Protection of the biodiversity, Promotion of natural attractions, Suitable management of water, energy, solid and dangerous waste, Greenhouse effect minimization, Management of emission of substances impacting the ozone layer, Chemical products management, Management of the air, acoustic and visual pollution, Support to environmental programs.
- **Sociocultural requirements:** Prevention and management of social risks (Sexual commercial exploitation of children, girls and teenagers, drug addiction, mendicity, prostitution), Support to local communities, Satisfaction of the local community, Recognition, appropriation and promotion of the tangible and intangible cultural heritage, Promotion of cultural attractions, Support to cultural programs.
- **Economic requirements:** Sustainable providers management, Promotion of sustainable products and services, Generation of local fair and equitable employment,

Support to local communities offering products or sustainable services, Training to employees and to local community, Customer satisfaction

Proposed Bogotá's key selling point

Bogotá is an emerging destination that surprises visitors. The city astonishes, first, because of the presence of green spaces, parks, wetlands and hills and, specially, for the integration of these natural spaces within the urban area. Bogotá surprises also for the deep contrast between the historical center with unique museums as the Museum of Gold in La Candelaria and urban sophisticated areas such as the Park of 93 or the Pink Zone with a top-notch gastronomic offer, the presence of international brands for a global shopping experience and a vibrant night life with bars, discotheques and casinos. So, Bogotá's cultural and natural landscape, tangible and intangible heritage, entertainment and leisure infrastructure give a unique character to the city attracting a growing number of domestic and international visitors. Art circuits, a creative economy (92% of creative services in Colombia are in Bogotá according to a Chamber of Commerce Report³⁷), local marketplaces, the internationally recognized gastronomic areas, it's strategic location in Latin America, the leisure oriented tourism activities, the birth place of the *Ciclovía*, and the largest hotel room offer in Colombia are the convincing features of Bogotá. That allows for promoting the destination as center of creativity and orange economy³⁸, as the epicenter of the gastronomic fusion between local and international food, as the leading tourism destination in Colombia with a wide range of big events, as a vibrant business and investment city, and as a sustainable mobility city.

Furthermore, the ability of Bogotá to ensure that visitors could experience the destination "as locals do" creates an emotional connection between visitors and the city, a fact that has been clearly identified by Bogotá's tourism officials. This is a key factor related to authenticity and with the will of Bogotano people to create the best emotional and unique moment to visitor. In this vein, the Bogotá Strategic and Action Tourism Plan 2017-2020 draws the vision to consolidate the city as the great tourist creative destination of South America under the

³⁷ Centro de Estudios sobre Desarrollo Económico, Universidad de Los Andes (2010), Caracterización del sector de industrias culturales y creativas en Bogotá y Cundinamarca. Cámara de Comercio de Bogotá, Bogotá. (online), available at: <http://emprendimientocultural.mincultura.gov.co/observatorio/wp-content/uploads/2017/05/Caracterizaci%C3%B3n-del-sector-de-industrias-culturales-y-creativas-en-Bogot%C3%A1-y-Cundinamarca.pdf> (27-07-2017)

³⁸ The orange economy includes sectors whose goods and services are based on intellectual property combining the creation, production and commercialization of creative contents (usually protected by copyright) that are intangible and of a cultural nature. See: Buitrago, F. & Duque, I. (2013), The orange economy. An infinite opportunity. Inter American Development Bank, Washington DC. (online), available at: https://publications.iadb.org/bitstream/handle/11319/3659/BID_The_Orange_Economy%20Final.pdf (20-07-2017)

attributes of genuineness, diversity and innovation. So, permanent surprise (concerts, street culture, people connection, among others), the multiplicity of simultaneously micro storytelling and the aptitude to offer experiences "off the beaten track" form the Unique Selling Proposition of Bogotá.

Performance management tools in place

The IDT Observatory of Tourism has a number of tools in place for tourism performance measurement and monitoring in Bogotá. Annual performance reports are generated as well as travelers profile analysis, visitor satisfaction studies, market profiles and inventories of the tourism supply have been developed. Additionally, many of the main city events have been also analyzed through the design of specific statistical operations. Market intelligence, demand demographics, industry studies and annual basic occupancy surveys are the main issues monitored by the Observatory of Tourism of the city. New developments such as the use of Big Data to have "real time" market, booking, satisfaction or reputation trends or the permanent monitoring of the economic, social and environmental impact of the tourism activity in the city are under discussion. Long term trends analysis, forecasting and benchmarking are only occasionally considered.

A.2 Visitor satisfaction criteria

The Observatory of Tourism of the IDT conducts a Visitor Satisfaction Survey among the demand that includes the monitoring of different city components of the tourist experience. The survey captures the level of visitor satisfaction with Bogotá since 2014 in a monthly basis. The analyzed components are:

- Attractions quality
- Attractions variety
- Tourism Services
- Hospitality Services
- Visitor Information Centers Attention
- Cleanliness
- Security and Safety
- Mobility

None of the items are specifically related to a single attraction or commercial activity and some of them are related to the city as a whole. Even though data collection done by the

Observatory of Tourism is huge and flexible, information about frequency of visitation (first time versus repeat visit or repetition within 5 years), intent to return to Bogotá and intent to recommend Bogotá as destination is not available. In order to enhance its tourism market intelligence, besides including new performance indicators, the IDT would introduce new market segmentation criteria, focus on specific attractions/areas of the city and introduce the satisfaction of visitors related to the activities/products consumed/visited. The use of Big Data sources is also recommended.

Regarding current satisfaction of visitors in Bogotá it can be highlighted the high values obtained by the "attractions quality" (9.3), the "tourism services" (9.2) and the "attractions variety" (8.6). The assessment of these aspects is very similar between international and national tourists. Another positive aspect is the very high value obtained by the "visitor information centers attention" (9.01) and by the "hospitality services" with 8.50. More than half of the national tourists (60.5%) perceived the destination as "costly" or "expensive". In contrast, 77.3% of the international tourists perceived it as "cheap" or "just".

Table 3.3. Visitors Satisfaction in Bogotá, 2015

Component	Domestic	International	Mean
Attractions quality	8.90	8.55	8.64
Attractions variety	8.08	8.62	8.50
Tourism Services	8.43	8.19	8.26
Hospitality Services	7.79	9.07	8.50
Visitor Information Centers Attention	7.08	9.35	9.01
Cleanliness	6.45	7.27	6.93
Security and Safety	6.30	8.06	7.28
Mobility	4.13	6.38	5.61

Source: Observatorio de Turismo. Instituto Distrital de Turismo.

B. Social and Cultural Perspective

B.1 Attractions

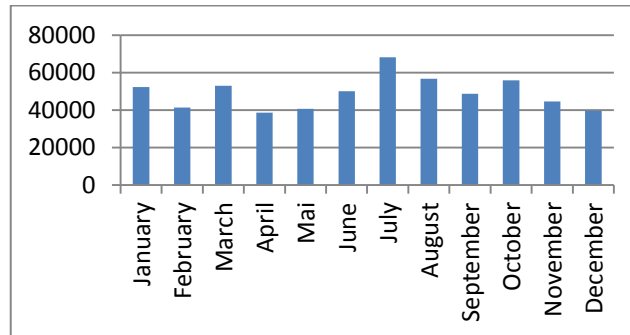
Table 3.4 Bogotá's Attractions Survey Findings Summary

Performance criteria	Value/Definition/Comment	Source
1. Number of cultural resources/attractions (i.e. theme parks, museums, operas, theatres, fairs & local traditions)	438 cultural attractions including 57 museums and collections, 62 art galleries, 33 library networks, 45 stage theatres, 75 sports and attraction parks, and over 150 monuments.	IDT, 2017
2. % of municipal budget allocated to culture	EUR 188 million in Culture, Recreation and Sports (7.6% of the total Bogotá District budget)	Bogotá Culture, Recreation and Sports Department, 2017
3. conservation/enhancement of the cultural infrastructure (investment into refurbishing and/or building new attractions)	A major sustainability plan is currently on going in the historic city center district of La Candelaria	IDT, 2017
4. % of local heritage in need of improvement	N/A	-

Often referred to as the “Athens of South América” since the colonial period, Bogotá has worked heavily in recent years to position itself as leader in cultural offerings in South America. The city has been awarded as IberoAmerica Cultural Capital by the *Unión of Ciudades Capitales de Iberoamérica* in 1991 and 2007 and World Book Capital by the UNESCO in 2007 and hosts many international cultural related events in the domain of theater, art, books and music. In 2012 it was awarded as Music Creative City by the UNESCO. Supporting this strong cultural orientation, Bogotá has many cultural venues including 57 museums and collections, 62 art galleries, 33 library networks, 45 stage theatres, 75 sports and attraction parks, and over 150 national monuments including 28 religious buildings of interest.

Many of the city's museums are renowned globally, for instance the Gold Museum, with 35,000 pieces of tumbaga gold, representing the largest collection of pre-Columbian gold in the world; the Colombian National Museum, one of the oldest in the Americas (1823) with collections in art, history, archeology and ethnography; the Botero Museum, with 123 works of Fernando Botero and 87 works by international artists; the Archeological Museum, which has about 30,000 pieces of pre-Columbian art or the Instituto de Ciencias Naturales. Bogotá has also historical museums like the Jorge Eliecer Gaitan Museum, the Museum of Independence, the Quinta de Bolívar and the Casa Museo Francisco José de Caldas, as well as the headquarters of Maloka and the Children's Museum of Bogotá. More recent museums include the Art Deco. The Gold Museum, one of the most representatives of the City of Bogotá received in 2016 589,620 visitors.

Figure 3.3 Visitors to Gold Museum, Bogotá (2016, monthly)



Source: Observatorio de Turismo. Instituto Distrital de Turismo.

The city also has 45 theaters. The principal ones are the Colon Theater, the newly built Teatro Mayor Julio Mario Santo Domingo, the National Theater, the traditional TPB Hall, the Theater of La Candelaria, the Camarin del Carmen (over 400 years old, formerly a convent), the Colsubsidio, and the renovated Teatro Jorge Eliecer Gaitan (with the highest capacity currently in South America), León de Greiff Auditorium (home of the Bogotá Philharmonic Orchestra), and the Open Air Theater "La Media Torta", where musical events are also held.

Many of the most important heritage landmarks are in La Candelaria, the historical district of the city, currently under a special destination management framework as it is explained in the next section. It is a showcase of colonial architecture as well as the place for government and representative buildings such as the presidential palace, the National Capitol and the Palace of Justice. A visitor route has been designed for this area including:

- Parks and squares (Bolívar, Chorro de Quevedo, Las Aguas, Santander, Los Periodistas, Germania, Rosario, La Pola and Rufino José Cuervo, Paseo de la Avenida Jiménez de Quesada)
- Museums and attractions (Observatorio Astronómico, Casa de la Moneda, Arte colonial, Museo de la Independencia, Botero, Museo del Oro, Quinta de Bolívar)
- Cultural sites (Balcón Palacio de San Carlos, Biblioteca Luis Ángel Arango, Casa de los Comuneros, Casa de Poesía Silva, Centro Cultural García Márquez, Colegio Mayor San Bartolomé, Palacio de San Carlos, teatro Cristóbal Colón)
- Churches and religious buildings (Iglesia de Santa Clara, Capilla del Sagrario, Casa del Cabildo, Iglesia de San Ignacio, Palacio Cardenalicio, Catedral Primada, Montserrate)
- Administration buildings (Capitolio Nacional, Palacio de Justicia, Palacio Liévano, Palacio de Nariño)

Additionally, other Bogotá *localidades* have also designed cultural routes which combine some tangible heritage resources with contemporary urban life and practices:

- The **Chapinero Norte** route includes parks and squares (El Virrey, El Retiro and 93) and also shopping and gastronomy icons and districts (Centro comercial Andino, Atlantis, El Retiro and Zona T and Zona Rosa)
- The **Chapinero Lourdes** route includes parks and squares (Lourdes, Giordano Bruno, Calle 70), churches (Lourdes) and shopping and gastronomy districts (Chapinero, Zona G)
- The **Centro Internacional - Parque Nacional** route includes parks and squares (Nacional, Independencia, Bicentenario, San Martín), museums (Nacional de Colombia, Planetario, Arte Moderno de Bogotá), modern buildings (Colpatria, Torres del Parque, Hotel Tequenmada) and gastronomy districts (Macarena)
- The **Usaquén** route, designed in a colonial landmark greatly appreciated by visitors and residents, also includes parks and squares (Usaquén, CR8 & CL113) with shopping and gastronomy areas (casa Hacienda Santa Bárbara, Usaquén).

In addition to the resources listed above, Bogotá has other iconic attractions such as the Montserrate shrine and mountain, that rises to 3,152 meters in the city center of Bogotá, and attracted in 2016 1,192,297 visitors with a peak in January (132,749) and a low in April (59,964) being one of the most visited attraction in Colombia according to the Instituto Distrital de Turismo. Two amusement parks are also located in the city: Mundo Aventura (1.2 million visitors per year ranked #8 among the top 10 Latin American theme parks in 2016³⁹) and Salitre Mágico. A third one, Parque Jaime Duque, is located in the municipality of Tocancipá, north of the city. Finally, the Bogotá region includes a very popular Colombian attraction: the Salt Cathedral in Zipaquirá (49 kilometers north of Bogotá), which is one of the most renowned attractions of the country. It is part of a larger complex including *Parque de la Sal* (Salt Park), and a museum of mining, mineralogy, geology and natural resources.

³⁹ AECOM & TEA (2017), *Global attractions attendance report 2016*. (online), available: http://www.teaconnect.org/images/files/TEA_235_103719_170601.pdf (20-06-2017)

Complementarily to tangible heritage cultural supply, Bogotá is also developing tourism projects and products based in the intangible cultural richness of the city. Some of them are explained below:

- **El Dorado Legend:** this is an ongoing product development project designed with the cooperation between a number of institutions including the IDT, the Gobernación of Boyacá, the Region Central, the Fundación Universitaria Cafam and the IDECUT, trying to combine the experience of the indigenous intangible culture of the native Muisca people of the Bogotá region with visits to some archeological sites and contemporary indigenous communities.
- **Following Gabo's footsteps in Bogotá:** this is a cultural route trying to explore the traces left by Gabriel García Márquez in the city during his stay in the 1940's. The includes suggestive and attractive themes such as visiting coffee shops in search of Macondo, remembering the Gabo's Bogotá or following the professional history of García Márquez as journalist in the city.
- **Vamos a la Plaza de Mercado:** a joint initiative of the IDT together with the IPES (Instituto para la Economía Social) and the Fundación Escuela Taller de Bogotá with the aim to preserve the traditional culture of food marketplaces, to identify it as part of the Colombian identity and to integrate it within the cultural tourism and economic development strategy of the city. This project has started in 3 marketplaces: La Perseverancia, el 12 de Octubre and 20 de Julio

B.2 Events


Table 3.5 Bogotá's Events Survey Findings Summary

Performance criteria	Value/Definition/Comment	Source
1. % of business events (conferences, corporate meetings, etc.)	Bogotá is a leading city in Latin America hosting business events with 45 ICCA events per year	IDT, 2017
2. % of leisure events (festivals, sporting activities, etc.)	The events inventory of the Observatory of Tourism of the IDT includes 23 leisure regular events: nine of them are ranked as of international interest, eight as of national and only six as of local interest.	IDT, 2017
3. The percentage of growth in terms of interest for hosting the events in the city – trend over the past 5 years	Bogotá aims to position itself as the events capital of Latin America and events organization is part of the Bogotá Strategic and Action Tourism Plan 2017-2020	-
4. The percentage of growth in terms of event visitation	Aggregate growth attendance of Festivals in the park has been 3.37% comparing 2013 (360,172	IDT, 2017

	attendees) and 2106 (372,313 attendees)	
5. % of the events that are focused on traditional/local culture and heritage	N/A	-

Bogotá has over 50 years of experience in hosting exhibitions/fair events and currently ranks 59th in the world's MICE events location city, #14 in the Americas and #8 in Latin America according to the ICCA ranking. Since 2016 The city is member of the "Best Cities Global Alliance" and will enjoy soon a new state of the art Convention Center "Agora" with 65,000 m² of space and a capacity to host events for 4,000 people. Additionally, Bogotá has over 60 traditional and non-traditional venues for hosting events in the city. The Greater Bogota Convention Bureau is the entity responsible for the promotion of Bogota and Cundinamarca to hold world-class events such as congresses, conventions and incentive trips. The Bureau joints public and private city partners. Among them, strategic partners are the Chamber of Commerce of Bogota, Cundinamarca, Bogota City Hall, ProColombia. The Bureau gathers more than 100 members, including restaurants, hotel chains, airlines, travel agencies, professional event organizers and BTL agencies, among other actors.

Figure 3.4 Agora Convention Center Factsheet



FACTSHEET

Design: DANIELBERMÚDEZ
Herrerrosarquitectos

CONSTRUCTION LOT: 19.273 SQM
CONSTRUCTION FOOTPRINT: 7.240,81 SQM
TOTAL AREA ÁGORA: 64.883 SQM

PARTNERS
BOGOTÁ CHAMBER OF COMMERCE
INTERNATIONAL BUSINESS AND EXHIBITION
CENTER - CORFERIAS
NATIONAL GOVERNMENT - FONTUR

GENERAL DESCRIPTION
Building design inspired in principles of
transparency, luminosity, integration with
the surroundings and respect towards
green areas

Over 18 meetings rooms with different
distributions and capacities

10 additional support rooms, VIP and
Board meeting rooms

Multifunctional and flexible spaces;
distributed in 5 floors

DANIELBERMÚDEZ
Herrerrosarquitectos

Source: <https://agora-bogota.com/index.cfm>

Apart from professional and business events, Bogotá is well known as one of the most exciting cities in Latin America staging cultural, music and artistic events. See, for instance, the role of arts, music, photography, literature, theatre, gastronomy and handcrafts in the events programming of the city for 2017. They account the 50% of the main events scheduled. Among them, there is the Ibero-American Theater Festival. This is one of the largest of its kind in the world enjoying over 450 performances across theaters and off-stage in the streets. The city is also hosting a Book Fair which is increasingly acknowledged in Latin America. Bogotá is home as well to film festivals, such as the Bogotá International Film Festival or IndieBo and of the largest free open air music festival in South America, Festivales al Parque (Festivals in the Park) as well as other music festivals. A recent research by the Bogotá Chamber of Commerce highlights that between 2012 and 2015, the city hosted 2.303 music events (the half of the entire country)⁴⁰. Music is, in fact, the driver of the award of Bogotá as UNESCO Creative City⁴¹.

Among cultural events, Festivales Al Parque (Festivals in the Park), an open air music festival created as part of a public strategy intended to generate cultural transformations, to stimulate citizens' appropriation of public space and to reinforce identity and diversity, today gather more than 350.000 participants every year allowing citizens from different social and economic conditions, ages and education levels, to congregate in public parks and open air spaces to enjoy different musical expressions. Since the first Rock al Parque festival in 1995, concerts have also included Jazz, Salsa, Hip Hop, Opera and Colombian traditional music programming international guests along with the local musicians. The event includes:

- Artistic Programming – Bogotano groups are selected through open competitions and national and international bands are invited to the event.
- Academic Programming – Participating artists, researchers and celebrities of the music industry become involved with the purpose of strengthening the technical and production levels of the national groups and audiences.
- Entrepreneurship – Festivals include conferences and information for participating musicians regarding circulation practices and possibilities and a Fair for exhibition and sales of products and services related to the different genres.

⁴⁰ Cámara de Comercio de Bogotá (2016), Economía de la Música en Bogotá. Bogotá. (online), available at: <http://www.ccb.org.co/Clusters/Cluster-de-Musica/Sobre-el-Cluster/Economia-de-la-musica-en-Bogota> (03-08-2017)

⁴¹ <http://en.unesco.org/creative-cities/home>

- Internationalization - Festivals favor the cooperation between Bogotá bands and similar festivals in other cities and countries.
- Social Events - The festivals allow the national and international guests to know the city from a touristic perspective.
- Line of Memory - Supports the publication of books, catalogues, documentaries, exhibitions, videos, postcards and the musical compilation as forms of creating social memory from the events.

Table 3.6 Main Events in Bogotá, 2017

Month	Event	Type
February	International Foot and Leather Show	Trade Fair
	PGA web.com	Golf Tournament
March	Bogota Design Festival	Arts
	Stereo Picnic Festival	Music Festival
	5K Race	Sports
April	Fotografika	Photography Event
	FilBo	Bogota Book Fair
	Iberoamerican Theater Festival	One of the largest in the world
	Bogota Fashion Week	Fashion
	5K Race	Sports
	10K Race	Sports
	Holy Week in Bogota	Religious Season
May	10K Race	Sports
	Free Zone World Congress	Congress
July	ArtBo	International Art Fair Bogota
	Indie Bo	Independent Film Festival Bogota
	Rock al Parque	Rock Festival (Free)
	Bogota Audiovisual Market (BAM)	Arts
	AgroExpo	Agroindustry Fair
	Bogota Marathon	Sports
August	LIT Bogota	Lights Festival in Public Spaces
	Colombia al Parque	Open air Colombia regions festival
	Gospel Festival	Arts
	Jamming Festival	Arts
	Alimentarte	Food Festival-Gastronomy
	Bogota Food and Wine Festival	Gastronomy
	10K Race	Sports
	Bogota Summer Festival	10 days of culture and sports activities to commemorate Bogota Birthday in Parque Simon Bolivar
September	Pope's Francis Visit	Religious
	International Design Festival	Arts
	Jazz al Parque	Jazz Festival (Free)
	Davis Cup Colombia vs. Croacia	Sports. In bullfight ring
	Sacred Music Festival	Arts
	5K Race	Sports
	10K Race	Sports
	Cirque du Soleil	Arts
	Feria del Hogar	Household Fair in Corferias
October	Barcu	International Art and Culture Fair
	Art and Fashion Circuit	Arts
	Bogota International Film Festival (BIFF)	Arts

	Bycicle Week	Sports/Recreation (1st edition)
	Hip Hop al Parque	Hip Hop Festival (Free)
	Mestizaje	Gastronomy
	Ajiaco Day (Bogota Typical Soup)	Gastronomy
	Bogota Music Market (BOMM)	Arts
	International Bogota Fair	Trade Fair
	5K Race	Sports
	One Young World Congress	Brightest Young Leaders Summit
	U2 in Concert	Joshua Tree 30 years Tour
November	Bogota Dance Festival	Arts
	Green Day in Concert	Concert
	Salsa al Parque	Salsa Festival (Free)
	TCI Global Conference "The future of Clusters"	Congress
	Detonante Festival	Music Festival
Diciembre	Expoartesanas	Handcrafts Fair
	Christmas in Bogota	Lights and cultural activities

Source: Instituto Distrital de Turismo

According to IDT, Bogotá aims to position itself as the event capital of Latin America, especially now that after the signing of long pending peace agreements between the Central Government and various guerilla groups have created an atmosphere of peace and prosperity. So, the interest in hosting events is increasing (in fact, in the second half of 2017, Bogotá will host a Pope visit to the city) and the city is supporting the organization of both business and leisure events at local, national and international level. Events organization is also part of the Bogotá Strategic and Action Tourism Plan 2017-2020 and from the perspective of the tourism city managers is a key component of the creativity condition of the city.

B.3 Community Attitude

Table 3.7 Bogotá's Community Attitude Survey Findings Summary

Performance criteria	Value/Definition/Comment	Source
1. % of residents that are satisfied with tourism at the destination	N/A	-
2. % of residents that are satisfied with the impact of tourism on the destination's identity	N/A	-
3. number of tourists/visitors per 100 residents	19.84 international tourists/100 residents 79.83 domestic tourists/100 residents	IDT, 2017
4. number of beds available in commercial accommodation establishments per 100 residents	0.38 without Airbnb 0.46 with Airbnb	IDT, 2017

The city of Bogotá has not available data about community satisfaction of tourism dynamics, performance and impacts of the city in terms of population.

Intensity of tourism in the city both from the demand (tourist/visitors per 100 residents) and supply (beds available per 100 residents) side is low. By administrative divisions (*localidades*), guest accommodations are concentrated in Teusaquillo (23.1%), Chapinero (21.8%), Santa Fe (10.5%), Usaquén (9.5%) and Candelaria (8.3%).

B.4 Community Engagement

Table 3.8 Bogotá's Community Engagement Survey Findings Summary

Performance criteria	Value/Definition/Comment	Source
1. % of population that participates in the community engagement programs (civic pride, volunteers, ambassadors, local buddies, etc.)	29 schools are participating in the Friends of Tourism Program Schools. Two other programs are set up for Taxi Drivers and general population.	IDT, 2017
2. % of the employees in direct tourism employment who are local	10,505 jobs (9,262 direct, 1,242 contracted)	Observatory of Tourism, 2017

Although data on the percentage of population that participates in community engagement programs in Bogotá is not available, it is noteworthy that several engagement programs on “Cultura Turística” have been set up by the municipality and participation is also significant when the city invites residents to comment and give feedback about policies, plans, actions and projects. Some innovative examples of ODT initiatives in this domain are highlighted below:

- **The City “hosts” program.** The “*Anfitriones de ciudad. Nuestra casa es Bogotá*” program introduces the destination to the residents. This is a program of city appropriation directed to providers of tourist services, civil servants and local community in the City of Bogotá. It includes tourism basic concepts and global trends, facts and figures about tourism in Bogotá and city tourism attractions information. It also share information about how to be and act as hosts to visitors in Bogotá as destination.
- **The taxi driver capacity building program.** The “*Soy un Ciudadano Amarillo. Soy un anfitrión de Bogotá*” is a capacity building program for taxi drivers that includes human relation skills, Bogotá tourism information, basic English and road traffic safety tips.
- **The Bogotá tourism security and safety program.** The Bogotá Tourism Security and Safety program aims at health, urban, environmental and consumer security and

safety issues as part of the Bogotá Integral Safety and Security Tourism Plan (PIST, 2011⁴²).

- **Friends of Tourism Schools program.** The “*Colegios Amigos del Turismo*” program is one of the most successful Tourism culture programs developed by the IDT. Promoted by the Ministry of Commerce, Industry and Tourism in 2005, it was adopted by the IDT in Bogotá in 2010. The main goal of the program is to introduce to students in the schools the values of tourism. To do so, the IDT together with the University Foundation Los Libertadores has developed two educational programs to train teachers in tourism culture. The first program was “Local management of tourism” and secondly “*Education and Didactics in the Tourism Trainign in Schools*”. To do so, educational programs are developed in cooperation with primary and secondary schools. They mainly provide tourism culture program content and Bogotá tourism information but also links between social sciences and tourism development, methodological and practical tools segmented according with different levels and courses and information about the developments undertaken by the 29 schools participating in the program.

While data on the percentage of employees in direct tourism employment who are local is not available, it is understood that in 2017 there are about 10,500 people employed in the local hotel sector (1,242 of them not directly by hotel and other accommodation companies but through intermediate firms).

B.5 Gender Equality

Table 3.9 Bogotá’s Gender Equality Survey Findings Summary

Performance criteria	Value/Definition/Comment	Source
1. % of men and women employed in the tourism sector	44% men and 56% women	Observatory of Tourism, 2017
2. % of tourism enterprises where the general manager position is held by a woman	N/A	-

Data on gender distribution of employees in the tourism sector in Bogotá is only available for hotel and accommodation companies. Neither is it available on positions occupied by men or

⁴² Alcaldía Mayor de Bogotá e Instituto Distrital de turismo (2011), *Plan Integral de Seguridad Turística de Bogotá*. Bogotá. (online), available at: https://issuu.com/idthbogota/docs/plan_integral_de_seguridad_turistica (12-07-2017)

women in the industry. Significantly, more jobs are occupied by women in the hotel industry than by men.

B.6 Inclusion

Table 3.10 Bogotá's Inclusion Survey Findings Summary

Performance criteria	Value/Definition/Comment	Source
1. % of businesses that have a budget for accessibility improvements	42.5% of hotels have access ramps 64.9% have corridors and common areas suitable for disabled 42.7% have accessible public toilets 23.2% have documents for guests written in Braille 3.3% have personnel that dominate the language of signs	Observatory of Tourism, 2017
2. % of rooms in commercial accommodation establishments accessible for people with disabilities	43% rooms adapted for persons with limited mobility 17.6% have rooms adapted for deaf - blind persons	Observatory of Tourism, 2017
3. % of commercial accommodation establishments participating in recognized accessibility information schemes	IDT has developed a guideline manual for disabled people " <i>Protocolos de servicio para el turismo accesible de turistas y visitantes jóvenes, adultos mayores y personas en situación de discapacidad</i> " to be applied in hotels, travel agencies, tour guides, transportation firms, restaurants and conference and conventions venues.	IDT, 2017
4. % of public transport that is accessible to people with disabilities and specific access requirements	N/A	-
5. % of tourist attractions that are accessible to people with disabilities and/or participating in recognized accessibility information schemes	44.7% of attractions have some components accessible to people with disabilities 9.4% of attractions have 3 or more components accessible	Observatory of Tourism, 2017

Inclusion has been a key point of the tourism strategy promoted by the IDT in Bogotá during the last 10 years and a number of actions have been set up in order to ensure accessibility for all including permanent and temporary disabled people, elders, families with kids, obese people and people with small stature. The IDT strategy deals with the suppression of physical, social, economic and geographic barriers. Following this purpose, between 2008 and 2011, the IDT started a process of demand and supply analysis to improve the inclusiveness of Bogotá's tourism portfolio including the definition of guidelines for tourism companies, the planning of accessible routes in the city and the making of a directory of disabled friendly tourism providers. As a result, a guideline manual for disabled people was published "*Protocolos de servicio para el turismo accesible de turistas y visitantes jóvenes, adultos mayores y personas*

en situación de discapacidad”⁴³. It can be applied in hotels, travel agencies, tour guides, transportation firms, restaurants and conference and conventions venues. IDT also includes accessibility indicators as part of the program of sustainability certification.

B.7 Safety and Security

Table 3.11 Bogotá’s Safety and Security Survey Findings Summary

Performance criteria	Value/Definition/Comment	Source
1. Comparison of the crime rates between the high and the low season periods	Higher incidence in high season, but data not available	IDT
2. comparison of the crime rates between the tourist centers and remaining parts of the city	Tourist centers are well protected but specific data not available	IDT
3. % of tourists who register a complaint with the police	According with the National Police, in 2016 there was a total of 26 complaints from foreign tourists for the crime of theft in the city of Bogotá. 12 of them were made by women and 14 by men. four were from US citizens and from France, three from Canadians, two were made by citizens from Germany, Switzerland and Venezuela and one by citizens from Brazil, China, Spain, United Kingdom, Netherlands, Ireland, México and Norway. One has not nationality information	IDT, 2017

Safety and security are issues of great importance in Bogotá. Not only in connection with tourism development but also as part of the vision of the city as an engine for peace in a period of post-conflict in Colombia. Public safety measures have been bolstered and even a Safety and Security Tourism Plan (PIST) was launched in 2011 including not only urban crime against visitors but also health, environmental and consumption safety issues⁴⁴.

The PIST is an innovative framework designed to facilitate the tourism development in the city through the creation of a friendly city based on the interpersonal engagement of citizens. The main objective of the Plan is to strengthen the safety conditions of the touristic zones of the city. Through public private strategies it aims at improving the capacity of the sector to ensure the integral protection of attractions and services as well as to favor its enjoyment and

⁴³ Alcaldía Mayor de Bogotá, Instituto Distrital de Turismo y Universidad de Colombia (2011), *Protocolos de servicio para el turismo accesible de turistas y visitantes jóvenes, adultos mayores y personas en situación de discapacidad*. Bogotá. (online), available at: http://www.bogotaturismo.gov.co/sites/default/files/Adultos_Mayores.pdf (18-07-2017)

⁴⁴ Alcaldía Mayor de Bogotá e Instituto Distrital de turismo (2011), *Plan Integral de Seguridad Turística de Bogotá*. Bogotá. (online), available at: https://issuu.com/idthogota/docs/plan_integral_de_seguridad_turistica (12-07-2017)

positioning by residents and tourists coming to Bogotá. The PIST draws a number of strategies in order to enhance both objective and subjective (perceived) security and safety related to the Security and Safety Information, Bogotá's positioning as safe destination, interinstitutional coordination and stakeholders co-responsibility. The plan also includes programs about information systems development, security and safety networks, monitoring, risk and emergency plans and health recommendations, among others. It also has special focus in the prevention of commercial sexual exploitation of children including specific participatory strategies for *localidades* of La Candelaria, Chapinero and Teusaquillo. Finally, the program has developed educational certificates in Tourism Safety and Security addressed to tour guides, police, civil servants and entrepreneurs and in Hotel Safety and Security addressed to safety personnel in hotels jointly developed with the Colombian Hotel Association (COTELCO).

B.8 Authenticity

Table 3.12 Bogotá's authenticity Survey Findings Summary

Performance criteria	Value/Definition/Comment	Source
1. Is your destination learning towards neighborhood tourism or built artificial tourist quarters "touristification"?	The two more "touristified" administrative divisions in Bogotá are La Candelaria and Usaquén. In both cases, local population and activities done by residents in the city (also academics, students and civil servants in the case of La Candelaria) are the main drivers of the economic and social dynamics of the place	IDT
2. Tourism product authenticity at the destination (e.g. gastronomy, local culture & traditions)	Local culture and traditions, gastronomy, intangible heritage and contemporary urban practices including night life, shopping, music and street entertainment are not only part of the tourism experience that visitors can enjoy in the city but also drivers of the current strategy for the development of tourism in Bogotá.	IDT

In spite of the continuous tourist growth in Bogotá during the last decade, "turistification" is a phenomenon that still does not significantly impact the city. The most tourist place of the city, the historical center of La Candelaria, is a vibrant and authentic place; where the local community, tourists, transients and thousands of students from all the corners of the country meet and where still traditional residents shape the picture in the street and prevail the atmosphere and spirit in the public space.

Even though some neighborhoods concentrate a higher part of the tourism related activity, Bogotá's tourism officials are aware of the importance of promoting tourism across the city and, as it has been previously summarized, the Bogotá's cultural and natural heritage as well as the man made attractions and the dynamics of the city itself provides a rich and diverse array of resources to create authentic tourist experiences for all. Authenticity is precisely one

of the differentiating factors of Bogotá. It can be found in Usaquén and his Sunday market flea, in the *Ciclovía* and the *ciclorrutas* where visitors can find people from all the social classes enjoying urban spaces, doing sports and promoting the use of bicycle in Latin America or in the Festivals at the Park. One of the challenges and opportunities of the city is, in fact, to promote all these spaces and diverse and inclusive activities initially planned for the citizen enjoyment also for the tourism experience. This vision can be an opportunity to face the growing global trend of “traveling like a local” or visiting places “off the beaten track”. To do so, Bogotá has a tourism administration framework which includes a local level of policy implementation. In fact, the 20 administrative divisions (*localidades*) of the district have even defined their strengths, opportunities and challenges. Additionally, a range of Zones of Tourist Interest have been identified in the past and a number of new touristic products (including environmental and rural offerings) have been created in different areas of the city. Some initiatives like “Vamos a la Plaza de Mercado” are also clearly oriented to relate the tourism experience with the local way of life.

Bogotá’s tourism possibilities include street culture, music, indigenous and colonial heritage, community activities, environmental unique ecosystems and multicultural gastronomy. In fact, the capital city of Colombia can be well known and appreciated by providing a range of opportunities to dive into local culture through immersive tourism products but also through the ability of sharing common spaces, activities and experiences with the resident population and being involved with local communities/families in the current post conflict context of the Colombian politics and economy.

IV. Showcase: Best Practice Examples

- **Promoting La Candelaria certification as sustainable destination**



On 15 February 2017 with the participation of the Faculty of Tourism and Hotel Business Administration of the Universidad Externado, Bogotá's IDT, the Colombia Ministry of Commerce, Industry and Tourism, FONTUR and with the supervision by the Colombian firm, Silva Carreño Administración e Ingeniería SAS, a project to implement the Sectoral Technical Standard (NTS – TS 001-01 “Tourist Destinations in Colombia – Sustainable Tourism Area. Sustainability Requirements”)⁴⁵ in La Candelaria, the most iconic area of Bogotá, was launched. The process will finish after 16 months. The expected outcome of the project is the establishment of a model for sustainable development involving environmental, economic, social, and cultural aspects with the participation and engagement of the different actors of the destination such as tourism firms, local government and the community.

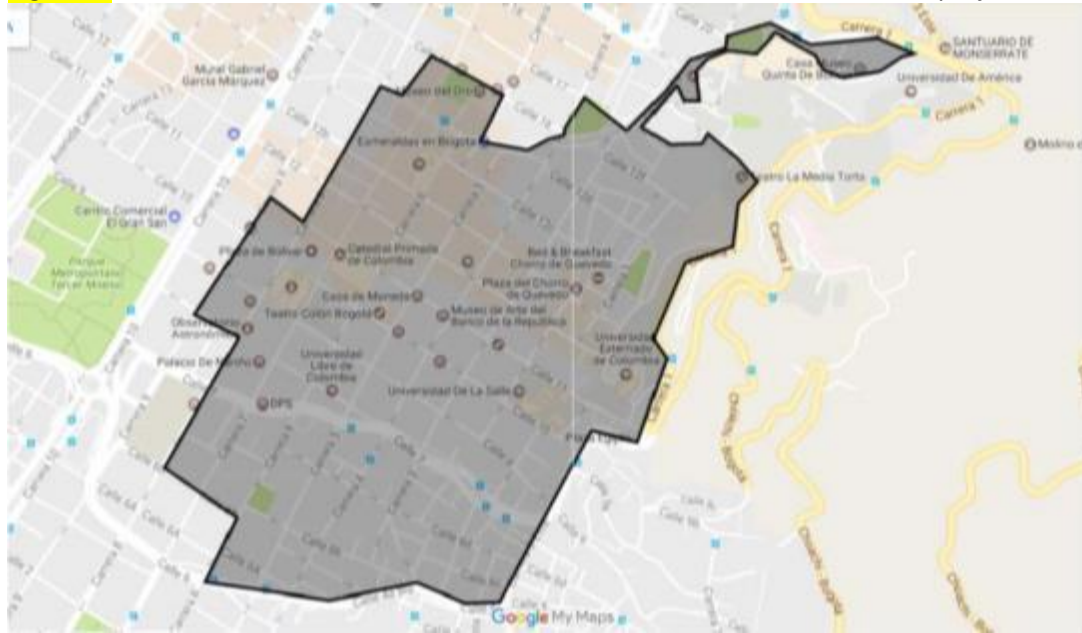
Technical sectorial procedures for sustainable tourism, NTS-TS in Colombia have a long tradition going back to 2006 when the Instituto Colombiano de Normas Técnicas y Certificación, ICONTEC, launched the first NTS-TS. The Faculty of Tourism and Hotel Business Administration of the Universidad Externado is the Sectorial Unit of Normalization in Sustainable Tourism designing and disseminating technical sectorial procedures of sustainable tourism, NTS-TS, for destination and for tourist services providers. Technical sectorial procedures include legal requirements, a sustainability management system, environmental, sociocultural and economic requirements and other complementary requirements adapted to each sector, industry or activity.

⁴⁵ ICONTEC (2006), Norma técnica sectorial colombiana NTS-TS 001-1. Destinos turísticos de Colombia. Requisitos de Sostenibilidad. Bogotá.(online), available at: https://www.fontur.com.co/aym_document/aym_normatividad/2006/NTS_TS001_1.pdf (17-07-2017)

The Colombian NTS-TS 001-1 for tourism destinations specifies requirements of management, as well as those related to the environmental, sociocultural and economic sustainability, applicable to a tourist destination or to a tourist area inside a tourist destination. It is an instrument that promotes the adoption of an approach based on product procedures, allowing the destination or tourist area permanently demonstrate that it is doing as requirements establish. The technical procedure defines a tourist area as a geographical unit spatially delimited with tourist vocation, with minor size than a tourist destination and with administrative aptitude to develop common instruments of management focused to achieving his sustainability. It is characterized by the presence of some of the following components: attractions, services or facilities, basic infrastructures, public, private actors or tourist demand, as a set of goods and services offered to visitors or tourists, in the zone and by a number of human groups, including the resident population.

Technical procedures NTS-TS 001-1 are used to promote the certification of La Candelaria as sustainable tourism destination. As stated previously in this report, La Candelaria is the most iconic tourism area of the city of Bogotá as well as the most visited locality. It concentrates about the 50% of the tourism attractions of the city and about 950 tourism service providers. Tourism is and should continue be a key driver of economic, social and personal development but risks associated to the progressive potential “touristification” of the place such as gentrification, loss of authenticity, growth of informal economic activities or human exploitation should be avoided. In the same vein, environmental impacts, especially those related to the consumption of resources, the management of waste and the deterioration of the urban landscape should be minimized. To this end, the sustainability certification of the area (see Figure 10) has been understood as the best opportunity to both ensure that tourism is the best engine to continuously develop the area and increase its cultural, heritage and creative value as well as to promote sustainability as a fundamental condition for tourism in the city.

Figure 4.1 Area included in La Candelaria Sustainable Destination certification project



Source: IDT

To achieve the certification as sustainable destination, a participatory process has been launched in La Candelaria. This process includes the organization of a number of workshops with local stakeholders from the tourism and hospitality sectors but also from educational, cultural and public services institutions and organizations as well as from the community in order to provide insights to the technical advisors about environmental, sociocultural and economic problems in the area, potential criteria and actions to solve them and procedures to include them in the process of certification. The main issues under discussion are:

- Environmental: sustainable use and management of natural resources, preservation of essential ecological processes and use of tourism to preserve the biodiversity
- Sociocultural: host community cultural authenticity preservation, use of tourism as a tool for the cultural heritage conservation and prevention of social risks associated to tourism.
- Economic: ensure fair and equitable economic activities for local people and support entrepreneurship and local value chains

- **Developing sustainable natural, rural and community based tourism projects**



The IDT is promoting and participating in tourism development initiatives that, taking advantage of the uniqueness of the rural and environmental resources existing within the city administrative boundaries, use landscapes, traditional rural activities and practices, intangible culture and contemporary community life to develop natural, rural and community based tourism projects. The IDT has even created practical toolkits for the involved agents such as the *“Protocolos de Operación Turística en Atractivos Naturales de Bogotá”* and *“Manual de Buenas Prácticas en Turismo Rural Comunitario”*.

Vision

One of the most important Colombian tourist products is nature. This is due to the quantity, uniqueness and diversity of Colombian natural resources. It is usually acknowledged that in this type of tourism the principal motivation is the observation and appraisal of the biodiversity. Nevertheless this can be also achieved together with the enjoyment of the traditional culture of the local populations living around natural areas and doing rural activities. So, natural attractions can be important elements for the social, cultural, environmental and economic development of rural zones around them. This can be applied to cities with attractive rural and natural areas in its surroundings as it is the case of Bogotá. The IDT identifies the following strengths and opportunities for Bogotá in this domain:

- The Bogotá district area is mostly rural (70%)
- 34 Resources/Tourists Attractions have been identified in this domain
- Bogotá counts more than 4,500 parks within the city, the hills and the Botanic Garden Jardín Botánico José Celestino Mutis

- Bogotá has a diverse natural heritage. Water is constitutive of this diversity with more than 190 gullies (*quebradas*) 15 wetlands and the Sumapaz paramo, the largest in the world
- Bogotá and Cundinamarca is one of the world capital city with largest number of bird species (699, of which 10 are endemics)
- There are additional natural areas of special interest in the region surrounding Bogotá such as the Parque Nacional Natural Chingaza, Suesca rocks, Tominé, the Guatavita lagoon, the Sabrinski desert, Neusa, Fúquene lagoon, the Sumapaz paramo and Chicaque park, among others.

Product development

The process of nature product development leaded by the IDT is based on the following procedures: planning and design work with local communities involved, adequacy of relevant attraction, signposting, market research and analysis, definition of a service guideline (guided tours, travel agents, local operators), branding, product test. Two examples already in place are the District ecological park of the Humedal Santa María del Lago and the Quebrada Las Delicias itinerary.

Interestingly, in cases such as the Quebrada La Vieja path (developed under an agreement between the IDT and the local branch of a conservationist association named Amigos de la Montaña - CONVENIO 226 –948 / 2016EAB), the project has been useful in order to strength the community appropriation of the public and natural space, to develop a management model to be applied in other initiatives such as the San Francisco river -Quebrada Roosevelt, to reinforce the community capacity building and, obviously, to improve the adequacy of the place for visitors –both residents and tourists-.

Figure 4.2 Ecological itineraries in Bogotá



When product development includes community rural activities, the process of design led by the IDT includes the following phases:

- Participative planning: work with local and rural communities in order to involve them in the product operation
- Design of the tourist product: attractions identification, carrying capacity estimation, signposting, creation of the interpretative scripts, enrollment of product providers.
- Promotion, marketing and commercialization: Nowadays, 2 routes (La Requilina and El Tunjuelo) are already in operation with local operators local, travel agencies commercialization, web page and promotional brochures.

In the case of La Requilina, the project involves 13 rural properties, 10 agro tourism local interpreters, route signposting, transportation, local gastronomy and souvenirs. In the case of the El Tunjuelo, agro tourism route, the number of rural properties involved is 9. The project includes 3 natural paths and 8 agro tourism local interpreters as well as route signposting, transportation, local gastronomy and souvenirs.

V. Summary of major challenges for Bogotá as tourism destination

Bogotá is the leading tourism destination in Colombia. It hosts almost half of international inbound tourism and has the largest number of cultural heritage, festivities and nature attractions and the largest hotel room supply (from backpacker hostels to luxury high end international chains) in the country. It also has the largest international air connectivity in Latin America. Bogotá is a safe, diverse, inclusive and sustainable city, a center for multinational and innovative business and for creative industries and an educational, technological and knowledge hub. Bogota is also a model for creative solutions related to mobility problems. 60% of international tourists come to Bogota for leisure purposes

Bogotá has optimal conditions to enhance and enlarge tourist activity with the only requirement that it improves the city economic and social development, their urban and territorial balance and the citizens living conditions. The strategy to achieve this is quality, sustainability and social responsibility.

As part of the UNWTO-WTCF City Tourism Performance Research Survey, the Bogotá Case Study Report evaluates the city tourism performance in two key areas: (1) Destination Management and (2) Social and Cultural Perspective. The report monitors the city tourism performance, provides a detailed description of the situation and helps to identify areas for improvement.

Current Bogotá's tourism strategy emerges from a long term policy and from a medium term plan that defines potential, expected and preferred development trajectories. This is the result of a formal process of planning development, public policy implementation, business investment, stakeholder involvement and community engagement. Given the heterogeneous nature of Bogotá's actual and potential tourism products, services and experiences this grand strategy is implemented through specialized plans for selected strategic initiatives tied to a limited set of visitors and specific business networks. In this context, some major challenges have been already identified:

- 1) **The relationship between urban planning, tourism development and local/place management:** The forthcoming Bogotá *Plan de Ordenación Territorial* will define the urban development strategy for the capital district from social, economic,

environmental, spatial and infrastructural perspectives. Recognition of tourism and tourism related activities is key for economic growth, community development, social equality improvement, environmental preservation and cultural positioning of the city. Detailed plans and strategies at local/place level adapting past and current tools such as the so called *Zonas de Interés Turístico* (ZIT) and *localidades* and local competitiveness round tables to the new urban planning schemes have to be sought as convenient tools for policy implementation, product development and community engagement. This will ensure the coherence between urban strategy, economic, social and living objectives for citizens and tourism business development.

- 2) **The design of a community based, responsible, inclusive and safe tourism development model:** The Instituto Distrital de Turismo is promoting responsible tourism development initiatives that, taking advantage of the uniqueness of the existing resources, use of rural and urban landscapes, live culture, citizen activities and practices, intangible heritage and contemporary life to develop community based projects. This means citizen engagement in policies, plans, actions and projects as it has been successfully occurring through several *Cultura Turística* programs. Inclusion has also been a key point of the tourism strategy promoted by the IDT in Bogotá during the last 10 years. Finally, social, health, environmental and consumption safety are not only current issues of great importance in Bogotá but also part of a vision where tourism in the city can be understood as an engine for peace in a period of post-conflict in Colombia.
- 3) **The participation of stakeholders in the tourism governance of the city:** Current emerging destination management organization processes and projects, challenges in visitors experience design, active sales promotion and destination life-cycle management arise concerns about how should be and how should be funded the future organization in charge of the destination management. Private public partnerships with decision making and budgetary involvement of the different stakeholders have been increasingly adopted by many leading and successful urban tourism destinations around the world as a convenient response to the management needs of destinations. The challenge is not to focus only on administration, public relations and marketing campaign management but also in place making and management at micro-local, local and regional level. In this sense, is worthy to remember that the Bogotá's Strategic and Action Tourism Plan 2017-2020

distinguishes 3 geographical areas of application: the District area, the Bogotá Region and *localidades* within the District.

4) The diversification of the tourism attractiveness of the city beyond cultural heritage:

Bogota has the priority to improve the quality of life of the citizens prioritizing the creation of public space, parks and sports facilities, enlargement of cultural offer in general and the promotion and the development of new mobility schemes. The city has prioritized as well the preservation of the environment of the hills and the privileged natural landscapes attached to the urban spaces. These actions are in perfect coherence with the development of new tourist products and match the current trend among visitors to explore places beyond the cultural heritage in order to experience common life urban activities ranging from walking to shopping or living the night life. This is also an opportunity to expand tourism along the city. In Bogotá, for instance, the Pink Zone (*Zona Rosa*), the most cosmopolitan neighborhood of Bogota and one of the zones attracting more national and foreign tourists, can have the opportunity to play an important role contrasting with other zones with heritage values, cultural attractions and historical traditions as La Candelaria or with environmental appeal as the Eastern Hills. Also in this vein, at the beginning of July, 2017 with the presence of the Major Mayor, neighbors and commercial firms a new initiative was launched "*Me la juego por la Zona Rosa*", a project with the aim to recover 83,000 square meters of public space and to reinforcing cleanliness, safety and mobility in the area benefiting residents and visitors.

5) The creation of new tourism products related to the city mobility solutions:

Bike tourism development is a challenge for the city of Bogotá. Nowadays, the network bike path allows to connect the main centers with the main visitor and tourist oriented areas (where most part of hotels are located) and to receive flows from secondary networks with complementary attractions. So, it offers a great opportunity to develop tourism initiatives clearly oriented to the new experiential expectations of the demand combining physical activity, "doing as a local" and sharing emotions with people of all social condition in Bogotá. Challenges are related to the storytelling of the product, to the design of complementary services for visitors, to the management of the product and to the intermodality with other transportation systems. Joint work with other institutions such as police, education, government, recreation and transportation is needed. Training the *Ciclovía* staff for tourism purposes has also to be done.

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