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South America –

a destination wins visitors' hearts

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The global contest to attract more tourism saw South America come runners- up to Central America in 2005. Venezuela and Colombia reported highest growth.

South American joy over high tourism figures in 2005 was marred slightly by little Central America overtaking the huge region stretching from the Caribbean to the Antarctic and from the Atlantic to the Pacific. A **12.7 %** increase in visitors over the results for 2004 placed South America firmly above the 5.5 % forecast by the WTO for worldwide growth in 2005, but landed them runners-up to winners Central America (+14.4 %). A glance at visitor numbers shows that South America's prospects for the future remain good. Last year only **18 million** of the world's 808 million tourists visited the region, some two million less than to Mexico, for example. In South America **Brazil** recorded the highest number of tourists, followed by Argentina and Chile. **Venezuela** (+23 %) and **Colombia** (+21.8 %) reported highest growth.

Tourism trends in South America at a glance:

...by growth in 2005			..by visitors in 2004			2005 ⁴		visitors from Germany ⁴	
1	Venezuela	+23.0 %	1	Brazil	6.138 mio.	6.176 mio.	1	Brazil	
2	Colombia	+21.8 %	2	Argentina	3.353 mio.		2	Venezuela	
3	Suriname	+21.3 % ^{*1}	3	Chile	1.785 mio.		3	Chile	
4	Peru	+15.3 %	4	Uruguay	1.756 mio.	1.917 mio.			
5	Argentina	+12.4 % ^{*2}	5	Peru	1.208 mio.	1.393 mio.			
6	Chile	+11.7 % ^{*2}	6	Colombia ^{*3}	770,000	938,000			
7	Brazil	+11.1 %	7	Ecuador	819,000	860,000			
8	Paraguay	+10.2 %	8	Venezuela	492,000	605,000			
9	Ecuador	+ 5.0 %	9	Bolivia	405,000	423,000			
10	Uruguay	+ 2.5 %	10	Paraguay	309,000	341,000			
11	Bolivia	+ 1.8 %	11	Suriname	138,000				
12	Guyana	- 3.9 % ^{*2}	12	Guyana	122,000				

^{*1} = 1st quarter 2005/04 only ; ^{*2} = 1st to 3rd quarter 2005/04; ^{*3} = incl. short trips; ⁴ = according to existing figures

Germany's South American top ten deviates from this statistic, varying along with flights and services. Thanks to direct charter flights, **Brazil** with 295,000 and **Venezuela** with 60,200 visitors had already topped the list in 2004, and this remained unchanged in 2005. With 58,953 visitors from Germany, **Chile** followed closely on the heels of Venezuela last year. Passengers flew regular airlines such as LanChile.

In 2005, as in 2004, **interest** in South America by the German market in general continued its **decisive upward trend**. Iberia, Germany's market leader for flights to South America, recorded **double-digit growth** on nearly every South American route. "Colourful, exotic and enthralling" commented Heide Linde of TUI. South America has won visitors' hearts, is a "**continente con corazón**". However, only 0.3 % of TUI tourists chose South America as their destination. Experts in custom travel DerTour were critical of **growth limits**; Jörn Krausser, Product Manager, Caribbean and South America: "Flight route quality and passenger capabilities are below par."

According to a poll of members of ARGE Lateinamerika e.V. (www.lateinamerika.org),

expectations in 2006 are low. Founded in 1982, the association grew by 23 % in 2002, and currently embraces 65 members of Germany's and South America's tourism sector. It dedicates itself to the **promotion of tourism** to South America, and together with Messe Berlin is once again organising a South America Forum (10 March, 3.30 – 5.30 p.m., Hall 7.1a, Hall New York 3) at the ITB. Chaired by Head of the Association Andreas M. Gross, discussion will focus on whether Central America's 2005 example of achieving highest growth by **concentrating marketing of tourism destinations** can benefit South America as well.

Countries and destinations

An outpost - the Antarctic

Following Luc Jacquet's successful movie "March of the Penguins", the Antarctic on South America's doorstep more than ever before became the 2005 **dream cruise destination** of nature lovers, Germans included. The "**trend is on the up**" is the unanimous comment of German tour operators such as Akzente Reisen, Ikarus Tour, or Windrose Fernreisen. Tourism is limited mainly to the months between November and February . Cruises to the Antarctic start from **Argentina and Chile**.

Argentina (attending the 2006 World Cup)

WTO: 3.353 mio. visitors in 2004; a rise of at least 13 % in 2005

Not long ago South America's second largest country stood on the brink of economic ruin. Argentina's turnaround has been so successful that President Néstor Kirchner intends to banish its "shameful past" by repaying the nation's IMF debts earlier than planned. Lonely Planet recently voted Argentina the "New Zealand of South America", the country most worth visiting in 2006 (followed by China and Nicaragua), and tourism has played a significant part in its economic recover. However, German providers of travel to Argentina lament that the country's sudden turnaround was accompanied by "an unjustified rise in prices". In 2005 Argentina often topped their lists as "most in demand", but at the same time there were reports that bookings were stagnating. Dertour bemoaned an "inability to handle passenger numbers" on inland flights and a lack of 4-star hotels, particularly in tourism centres such as El Calafate, the gateway to the Las Glaciares National Park with its impressive Fitz Roy mountain range. According to Minister of Tourism Enrique Meyer, in future Argentina intends to make a name for itself as a tourism destination of globally outstanding quality

Internet: www.turismo.gov.ar

Bolivia

WTO: 422,902 visitors / + 1.8 % in 2005; slogan: "Natural attractions still exist"

The fact that the country with the **highest share of indigenous populations** is now ruled by a presidente indígena, Evo Morales, is no reason for German tour operators to start worrying, on the contrary. Klaus Buntenkötter, head of the La Paz office of the South America Information and Marketing Agency Comcenter (www.bolivialine.de), founded in 2005: "Bolivia's political situation rather gives us hope." After poor results in 2005 many of Germany's operators to Bolivia see **good opportunities for growth** in 2006. Bolivia itself has been heavily promoting the **Salar de Uyuni** since 2004, and in 2005 a three-year marketing programme to assist the **missions** was started up. New developments include an information office at El Alto Airport, an Ecological Centre in the Avaroa National Park, a 4-star hotel in San Pedro de Quemez (near the Salar region), a hotel made of salt in Tahua near Salar, and a **History Centre** in the former Franciscan monastery of La Paz. The **Madidi National Park** has become the main attraction for nature lovers. Comprehensive programmes organising tours of Bolivia, e.g. by Miller-Reisen (www.miller-reisen.de), also offer excursions to the world's **highest skiing** retreat and to the **Pantanal**.

Internet: www.turismobolivia.bo, www.bolivia.com, www.bolivia.de

Brazil (attending the 2006 World Cup)

WTO: 6.176 mio. visitors/ +11.1 % in 2005; slogan: "Brazil: sensational ! "

In 2005 tourism to South America's largest country fell short of expectations, thwarting its ambitious goal of reaching 9 million foreign visitors by 2007. Nonetheless this giant of the Amazon region consolidated its position as **one of the most important destinations on the map** worldwide. Interest by German holidaymakers remains similarly stable, and among European fans of Brazil they are second only to the Portuguese. According to **TUI** company spokesman Robin Zimmermann, thanks to Condor's chartered flights to Salvador de Bahía the tour operator actually recorded "**a significant increase in bookings**" to Brazil. In terms of numbers to South America this major tour operator also places Brazil top, ahead of Venezuela and Peru. TUI has added the region around **Recife** to its catalogue, and since 2005/2006 has also been booking custom holidays. Currently Brazil is making efforts to improve the rate of success even further. With a budget of 92 million reales, the Brazilian Ministry of Tourism once again intends to spend record amounts on promotion in 2006. The state tourism authority Embratur is pinning high hopes on its **Plano Aquarela**, a marketing plan that puts an even greater focus on the five main tourism areas: sun and beaches, ecotourism, sport, culture and business & events. In October left-wing President Luiz Inácio Lula da Silva, "Lula", will stand for re-election. Creating **new jobs** in tourism has been among his aims, and some 300,000 are said to have materialised in 2005.

Internet: www.turismo.gov.br und <http://institucional.turismo.gov.br>

Chile

WTO: 1,789 mio. visitors /+11,7 % in 2005

In 2005 the **model hosts of South America** attracted more visitors from Europe (+ 8 %) than ever before, among them 58,953 Germans. Counting Austrians and Swiss, the number of German-speaking holidaymakers to Chile equalled numbers to Venezuela by chartered flights. Chile's recipe for success: besides the splendour of its landscapes from Peru to Cape Horn, Chile also has an outstanding infrastructure and "many parallels with the European way of life" (Chile tour operator Akzente Reisen). In cooperation with Fundación EuroChile, a tourism plan for the Europe market aims to draw even more attention to Chile's image as a **clean and safe holiday destination** in 2006. Intensifying efforts to promote wine tourism will add to the numbers of holidaymakers with special interests. And for the **Camino del Inca** a new chapter has begun. Chile has signed a cooperation agreement with Argentina securing the route through Argentina's Corredor de la Puna. In 2005 Chile finally bid farewell to the Pinochet era with a new constitution. The press has already hailed the country's new president Michelle Bachelet as the Angela Merkel of Chile.

Internet: www.sernatur.cl

Ecuador (attending the 2006 World Cup)

WTO: 860,000 visitors / +5.0 % in 2005; slogan: "Ecuador – the true life "

This small country nestling in the Andes began 2005 with a large-scale publicity campaign in Europe, North and South America. In **Germany** (22,000 visitors in 2004), **Ecuador's second most important source of tourists after the UK**, this included opening tourism offices (c/o BZ.comm, www.bz-comm.de). Despite various German operators retrospectively referring to the market as stagnant, due to "unjustified prices" and "pandering to the US market", the publicity drive has left its mark. In Germany both Thomas Cook and Airtours have made Ecuador part of their programme, and in the USA **National Geographic** listed it among the top ten travel destinations of 2006. Currently the Ministry of Tourism has begun a campaign entitled "Ecuador – it's you" to make local inhabitants more aware of their role as hosts. Ecuador wishes to be seen mainly as an **eco destination**. Experts in travel to South America *viventura* (www.viventura.de) have put together two tours. For **beach holidays** they are promoting the coastal region of Salinas to Puerto Cayo, under the heading **ruta del sol** (www.rutadelsol.com.ec). For the **World Cup** a 6-digit figure has been set aside, e.g. for advertising in the media and through German travel agencies. Minister of Tourism María Isabel Salvador Crespo: "If we win the World Cup we'll invite 100 Germans to Ecuador." **Galapagos** (125,000 visitors /+ 16 % in 2005) is a cause for concern, the director's post having remained vacant for almost two years. Comcenter SouthAmerica (www.ecuadorline.de): "The **problems** are mounting. Staff are lacking and illegal fishing is getting out of hand. Tourist numbers and the local population on Galapagos are growing unchecked."

Internet: www.vivecuador.com/

Falkland Islands (Islas Malvinas)

Until now the Falkland Islands were mainly a stopover on Antarctic cruises, but due to the fascinating local **wildlife** operators such as Windrose Fernreisen introduced visits of several days to their tours in 2005. Other tour operators include Duma Naturreisen, Natur-

Studienreisen and Ruppert-Brasil. The islands within reach of **the Antarctic** are home to elephant seals, fur seals and sea lions, and are the breeding ground of Magellanic penguins, gentoo penguins and rockhopper penguins, as well as numerous bird species, including black-browed albatrosses, upland geese and kelp geese. The fact that these birds are so tame reminds many visitors of the Galapagos Islands.

Internet: www.tourism.org.fk

French Guiana

Annually around 65,000 visitors; slogan: "Terre d'Amazonie"

Canoe trips in **national parks** renowned for their biodiversity, visits to the **Maroons**, a tour of the European Space Agency in **Kourou** (launch site of the Ariane rockets), excursions to the **Iles du Salut** (retracing the footsteps of Papillon) or eating creole dishes in Cayenne: in spite of cheap Air France flights **via Paris** taking off from nearly every German airport, offers to see the attractions of France's overseas department 7000 km from the French capital hardly appear on the German market. This is a niche filled by the Swiss operator Antilles Evasions Voyages (www.antilles.ch) which lists numerous discovery tours. According to French Guiana's Chamber of Industry and Commerce (www.guyane.cci.fr) visitors to the overseas department number 65,000 per year.

Internet: www.tourisme-guyane.com

Guyana

WTO: 117,000 visitors / -3.9 % in 2005

Despite the Guyana Tourism Authority (GTA) working with the highest budget to date in 2005 the country known to Guyanans as the **land of many waters** failed to match its 2004 visitor record of 122,000. During the first nine months tourist numbers dropped by 3.9 % over the previous year. However, since instituting a plan for **sustainable ecotourism** in the late nineties the country has succeeded in increasing tourism sixfold. Hopes are concentrated on a new 5-star hotel and on ecotourism to the **Iwokrama rain forest** (www.iwokrama.org), home to the indigenous Makushi peoples and an area where as yet there is little tourism. The legendary Mount Roraima (2810 m) is on the tripartite border between Guyana, Brazil and Venezuela. Inland, the 226-metre **Kaieteur Falls** are a must-see highlight.

Internet: www.guyana-tourism.com und www.mintic.gov.gy

Colombia

WTO: 938,000 visitors / +21.8 % in 2005; slogan: "Vive Colombia – viaja por ella"

"Colombia lives – go there" – last year the campaign which the government, the Ministry of Tourism and the Fondo de Promoción Turística started in 2002 attracted 167,860 more visitors (short trips included) to this crisis-ridden country than in 2004. The general feeling is one of **optimism**. The era when police and the military were needed to accompany excursions seems to belong to the past. Guerrilla factions and the government have begun

talks. According to comments made to the press by ELN commander Antonio García, now that leftwing presidents rule Venezuela, Brazil und Bolivia “the global situation has calmed down”, enabling **a process of change**. In 2005 more tour operators in Germany were offering travel to Colombia than ever before. However **bookings were low**, since the Foreign Office continues to advise against travel to Colombia (particularly in 2006, with presidential elections coming up). “Many are sceptical at first, but in the end are completely won over”, says André Kiwitz of viventura- Reisen. Currently he is putting together a website ([www.ist- Colombia-sicher.de](http://www.ist-Colombia-sicher.de)) where travellers can relate their experiences. Among Colombia’s highlights are stunning beaches on the Caribbean coastline, nature reserves and a rich tradition in (music) folklore.

Internet: www.turismocolombia.com, www.mincomercio.gov.co

Paraguay (attending the 2006 World Cup)

WTO: 341,000 visitors / +10.2 % in 2005; slogan: “Mundo Guaraní ”

The only country in South America to have two official languages, **Spanish and Guaraní**, in 2005 Paraguay once again recorded double- digit growth in visitors, even if the figures were slightly down on 2004. **Closer cooperation** between the tourism board Senatur and the private tourism sector had a marked effect on visitor numbers from **Germany (+14.6%)**. Friedhelm Angersbach, owner of the hotel Westfalenhaus in Asunción noted “a huge increase in the number of guests”, in particular from mid- 2005 onwards. The tours mostly in demand were those to the Gran Chaco, to the region around San Bernadino/Altos, to the South East around Encarnación, and ones combining the waterfalls and Itaipú. For the first time in 2005 the Ministry of Tourism held its own international travel trade fair in Asunción. Together with neighbouring Brazil it has also set up a project called **Caminos integrados de turismo** to make fishing tours to the **Lago Itaipú** more attractive to tourists. Work on a plan to gradually open up the Paso Bravo National Park to tourism is also underway . Since January potential visitors may inquire at the **Centro Guaraní** in Castilla de La Mancha.

Internet: www.senatur.gov.py

Peru

WTO: 1.393 mio. visitors / +15.3 % in 2005; slogan: “un destino privilegiado”

The slogan “Peru – a privileged destination” is a reference to the singular treasures of archaeology and nature to be found in this country high up in the Andes, but once again flight availability from Germany in 2005 told a different story . However, according to Sünje Fischer, head of the Lima office of Comcenter SouthAmerica (www.peruline.de), **local airlines** Starperu and Aerocondor have increased their flights. Booking numbers to Peru with German operators were **high to very high, and the trend was on the up**. Trekking tour organiser Wikinger Erlebnisreisen reported an increase of 30 %. There was praise all round for good advertising. German marketing activities in 2005 included a press conference, during which Peru for the first time introduced itself as **a destination for gourmets**. Peru’s Ministry of Tourism has also signed a sponsorship deal with the current world surfing champion Sofia Mulanovich (22), who will promote the

country as a **destination for surfers** (Punta Hermosa, Manora Punta Sal, Chicama). For **bird watchers** a brochure on Peruvian bird species was published in 2005 entitled: "Perú: lo ultimo en destino de observación de aves" (Peru: The Bird Watchers' Paradise). Peru's National Culture Institute has put forward a **10-year master plan** to avoid Unesco putting **Machu Picchu**, now overrun by tourists, on the list of endangered world heritage sites. It calls for returning the Holy Valley of the Incas at Cuzco to its original state during the Inca period, and for diverting tourists away from Machu Picchu by showing natural cults.

Internet: www.peru.org.pe

Suriname

WTO: +21 % (1st quarter 2005); slogan: "The beating heart of the Amazon"

There has been a surge in demand to visit this multi-ethnic paradise of the Amazon basin, a country eager to point out that it has the **lowest crime rate** in Caricom. According to Suriname expert Claudia Langer of S.T.O. Swiss & Suriname Travel Organisation (www.Surinam.ch) some 1200 Germans travelled to Suriname in 2005, an increase of 120 % over 2004. Paramaribo, capital of the former Dutch crown colony which gained independence in 1975 is a **Unesco world heritage site**, as is the Raleighvallen Nature Reserve in central Suriname. This **rain forest with its exceptional biodiversity** is considered the world's largest region of its kind. Tours include expeditions to observe nature, visits to the Trio, Wayana and Akurio Amerindians, and to various groups of Maroons. For anyone interested, Suriname can also be explored by bicycle. Promoting ecotourism inland is one of the aims of the new Minister of Tourism Alice Amafo.

Internet: www1.sr.net/t100956/, www.parbo.com/tourism

Uruguay

WTO: 1.917 mio. visitors / +2.5 % in 2005; slogan: "Uruguay Natural "

Despite being the **smallest country** in this large region, a stream of visitors from its local neighbours meant that Argentina's favourite bathing destination was well placed in South America's visitor rankings once again. Uruguay expert Michael Hahn of touruguay (www.tourugua.de) says that "European demand for travel to Uruguay has been high for some time now". Last year **stunning beaches on the Atlantic coastline**, e.g. in Punta del Este, the **Unesco world heritage site** Colonia del Sacramento, holidays on Estancias or relaxing in thermal baths were responsible for attracting **15.5 % more visitors from Europe**. Montevideo is the headquarters of the Mercosur trade pact.

Internet: www.turismo.gub.uy

Venezuela

WTO: 605,160 visitors / +23 % in 2005; Slogan: "The best of both worlds"

At the same time as President Chávez was enjoying growing support throughout South America last year, and joining Mercosur, tourism to Venezuela was thriving. The **biggest proportional increase in visitors** (+23 %) handed the country South America's top spot in 2005. In Germany, according to DerTour, cooperation with the Venezuelan Tourist Board was "outstanding". As in 2004, Venezuela came second to Brazil as the country attracting the highest number of German holidaymakers to South America, thanks to charter flights to Porlamar on **Isla Margarita**. Whereas some tour operators feared that Venezuela's support for low-budget tourism could wreck its **appeal as a nature retreat**, the country went on the offensive to promote quality, e.g. by **transforming Isla Tortuga** into an upmarket bathing resort. Cooperation with Cuba has among other things resulted in the opening of Cuban hotels.

Internet: www.visit-venezuela.com , www.mintur.gob.ve