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Bureau for Science and Technology
Agency for International Development

Southeastern Center for Forest Economics Research

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Nature-Oriented Tourism in Ecuador: Assessment of Industry Structure and Development Needs

By

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FPEI Working Paper No. 20

FPEI Working Paper Series
June 1987

The SCFER Institutions
USDA Forest Service Southeastern Forest Experiment Station
North Carolina State University Duke University

Wilson, Mystie A. 1987. Nature-Oriented Tourism in Ecuador: Assessment of Industry Structure and Development Needs. Southeastern Center for Forest Economics Research, Research Triangle Park, NC. FPEI Working Paper No. 20, 37 pp.

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March 1987

"The Forestry Private Enterprise Initiative"

Project of the Southeastern Center for Forest Economics Research
with the USDA Forestry Support Program
and AID's Bureau for Science and Technology

The Forestry Support Program is managed jointly by the U.S. Department of Agriculture's Forest Service and Office of International Cooperation and Development with funds provided by the Agency for International Development's Bureau of Science and Technology through its Office of Forestry, Environment, and Natural Resources.

This is one in a series of studies on natural history as a source of tourism income and employment for developing countries. The author acknowledges the assistance she received from the following individuals affiliated with the nature-oriented travel industry without which this study would not have been possible:

Miriam Burneo Calisto,	General Manager of Viajes Orion Travel Agency.
Peter Buhl,	General Manager of Etnotur Travel Agency.
Calaway Dodson,	Owner/Manager of Rio Palenque Science Center.
Daniel Kuperman,	General Manager of Hotel Crespo.
Gorge Hurtado Morales,	General Manager of Hotel Anaconda.
Mariano Proaño,	Director of Tourism for Metropolitan Touring Travel Agency.
Arturo Ponce,	Head of the National Parks and Wildlife Department, Ministry of Agriculture.
Roque Sevilla,	Economist, Tecniseguros.
Gerardo Vasconez,	Economist, DITURIS.

She also would like to express her appreciation for the assistance provided by James Finucane of the U.S.A.I.D Mission in Ecuador and by Jan G.Laarman of the Department of Forestry, North Carolina State University. All views and interpretations expressed within this paper are the sole responsibility of the author.

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1. INTRODUCTION.

I.A. Purpose of Evaluation and Survey.

The following report discloses the results of interviews and surveys conducted in Ecuador from mid-September through mid-December, 1986. The purpose of these evaluations was to determine the quality of nature-oriented tourism available in Ecuador and to identify developmental constraints. Nature-oriented tourism is regarded as a variety of tourism offering one or more special interests related to ecological and natural history attractions.

Ecuador has a number of national parks and wildland reserves offering diverse ecosystems for ecological tourism. Already it is well-known internationally for natural history travel to the Galapagos Islands, receiving upwards of 40,000 visitors in 1986. Of the national parks on the mainland, Cotopaxi receives the most visitors, with a large percentage being Ecuadorian nationals. The remaining national parks are not visited as regularly, and generally lack infrastructure.

A number of privately owned reserves and establishments catering to nature-oriented tourists offer special interest excursions. These include interests such as bird watching, mountain climbing, trekking and other ecological attractions.

I.B. Objectives of This Study.

The specific objectives of this research are as follows:

- to describe representative nature-oriented tours now available;

- to assess the quality of guide services on nature-oriented tours;
- to evaluate the quantity and quality of technical information for nature-oriented tours;
- to determine tourist motivation to travel to Ecuador;
- to determine the overall knowledge tourists have of Ecuador's attractions; and
- to assess the satisfaction levels of tourists' travel through Ecuador.

II. SURVEY PROCEDURES AND RESULTS.

II.A. Questionnaires.

II.A.1. Survey of Operators with Nature-Oriented Establishments.

The first questionnaire surveyed operators of nature-oriented establishments. Some of these establishments and operators were among those previously identified and contacted by Jan G. Laarman in May of 1986 while conducting the preliminary study for research needs for the development of nature-oriented tourism. Furthermore, these operators suggested contacting a number of other establishments catering to nature-oriented tourism. Each operator was asked about: (1) the types and numbers of tourists who visit the establishments; (2) the activities and attractions that are offered; and (3) the business environment of accommodations, services, prices, and future expansions.

II.A.2. Survey of Tourists with Natural History Interests.

The second questionnaire surveyed tourists on nature-oriented tours to determine: (1) travel motivations; (2) satisfaction level of tours; (3) visitor knowledge about Ecuador; and (4) expenditures while traveling.

II.B. Results.

II.B.1. Travel Agencies

Ecuador has a large number of travel agencies that offer travel arrangements with international and domestic airlines. However, the number of agencies offering specialized tours within Ecuador is limited, but growing in number.

II.B.1.a. Metropolitan Touring.

The largest of these tour agencies, Metropolitan Touring, has been responsible for promoting the Galapagos Islands and Ecuador for many years, offering a number of special interest tours. Metropolitan Touring was one of the first travel agencies to offer cruise travel around the Galapagos Islands and jungle excursions in the Amazon Basin.

Available Tours.

Metropolitan Touring offers a wide variety of excursions throughout the country. Such excursions include city and shopping tours, a train ride through the "Avenue of Volcanoes", mountaineering and trekking tours in the Sierra region, jungle excursions to the Amazon Basin area, and Galapagos cruises. Other special interest tour itineraries are bird watching tours, Indian culture tours, and agricultural tours. All tours include guide services and the highest quality accommodations available.

Guide Services.

Metropolitan Touring uses trained naturalist guides for their tours. These guides receive intensive training in the Galapagos and the Amazon region with emphasis on natural history, people management, and communications.

Technical Information.

Metropolitan provides a number of different types of technical materials to their tourists. These materials consist of maps, Galapagos bird lists, and pamphlets. The company also shows slide presentations and videos to enhance its tours.

Promotion.

Metropolitan has offices throughout the country and affiliate offices in the United States and Europe. With these agencies they promote Ecuador's attractions and arrange familiarization tours with travel agents. Metropolitan Touring is also one of the few travel agencies of Ecuador to regularly attend travel industry conventions such as El Mercado.

Competition.

Until recently Metropolitan's strength and control of certain travel options had reduced the opportunity for the growth of other competitive agencies. At present there is growing evidence of a wider variety of agencies offering special interest and nature-oriented tourism.

II.B.1.b. Etnotur.

The travel agency Etnotur also has been responsible for the promotion of Ecuador in an international market for a number of years. Its main international affiliations are with Hausen Travel in Germany, and Alpenverein in the United States.

Available Tours.

Etnotur's itineraries of adventure tourism include mountaineering, jungle excursions, train travel to northwestern Ecuador, and relaxing days at the beach. Optional travel includes tours to the Galapagos Islands with accommodations at Etnotur's new hotel on San Cristobal Island, with daily excur-

sions to the surrounding islands. The tour features meals, national air and ground transportation, equipment, and various types of accommodations. Accommodations range from first-class hotels in Quito, to second-class quarters at the beach, to camping in the mountains, and sleeping in hammocks in the Amazon.

Guide Services.

The guides on these trips are experienced in mountain climbing, jungle hikes, and in Ecuadorian history and culture. They receive first-hand training as guide assistants on tours and expeditions. Some are students studying social anthropology at the Catholic University in Quito. Most guides speak several languages, predominantly Spanish, German, and English.

Technical Information.

Available technical information on these excursions is limited. Identification books on birds and plants are made available as references, but no bird or plant lists are given. The guides are familiar with the animal species and their habitats on a general basis. However, their knowledge of scientific names and detailed information is lacking, showing a need for natural history training. The guides point out interesting medicinal and survival techniques of the native people who use the surrounding flora.

Competition.

Etnotur's competition at present is with Nuevo Mundo, which also offers adventure tourism, and with independent agencies from

the United States. These agencies conduct a number of organized tours each year offering adventure tourism. These groups are accompanied by their own guides and have special interests in one or more areas of natural history.

Promotion.

At present Etnotur is in the process of expanding its travel business through new marketing techniques, promotion, and attendance of travel trade conventions such as El Mercado. They also have invested in the construction of a new hotel in the Galapagos Islands to encourage that travel option.

II.B.1.c. Viajes Orion.

Viajes Orion is a new travel agency. It emphasizes nature-oriented tourism specializing in ornithology, anthropology, biology, photography, and mountaineering.

Available Tours.

Viajes Orion offers city tours, Indian market tours, mountain climbing and trekking trips, a variety of jungle excursions, and Galapagos Islands cruises. Special interest excursions include archeological tours and birding tours, to mention only a few.

Guide Services.

Viajes Orion uses Ecuadorian and foreign national naturalist guides on their excursions. These guides are often professionals

having university degrees in fields of ornithology, archeology, and biology.

Promotion.

Being a young firm, Viajes Orion is in the process of building contacts and generating new partnerships nationally and internationally in its promotion of natural history tourism of Ecuador.

II.B.1.d. Hotel Crespo.

Hotel Crespo is located in the colonial city of Cuenca, in the province of Canar. It is one of the only establishments in that region to offer nature-related tourism.

Available Tours.

This firm offers excursions to Cajas National Park, jungle tours to the province of Morona Santiago, trips to Ingapirca (the Inca ruins of Ecuador), mountain lodging and trekking at Albergue de Montana, and several city and shopping tours throughout Cuenca and the surrounding communities.

The travel options to Cajas and Albergue de Montaña include horseback riding, trout fishing in the many glacial lakes of the area, and a chance to see the condor, Ecuador's national bird. The Morona Santiago adventure tour to the Amazon Basin of southern Ecuador includes jungle hikes to observe the flora and fauna, river travel in dugout canoes, and visits to the Shuar Indians.

Guide Services.

At this time the manager of Hotel Crespo, D. Kuperman, is the only guide offering nature-oriented tourism in Cuenca. He is a local guide who acquires his natural history information from the visiting scientists and national parks studies, allowing for a relatively high-quality tour.

Technical Information.

The technical information on these excursions is available through the guide. However, at present printed material is rare. A number of biologists, ecologists, and scientists have studied and are continuing to study in this area. As interest mounts and investments are made, this information is slowly filtering out in the form of pamphlets, books, slide shows and flora and fauna lists.

Promotion

Hotel Crespo is expanding its hotel and seeking new contacts with international travel agencies. At present its major form of international promotion is through Etnotur and its mention in the South American Handbook. New contacts with travel operators at the travel trade convention, El Mercado, were made to increase promotion and travel to the Cuenca area.

II.B.1.f. Frigata.

Frigata is a recently formed travel firm offering natural history and cultural journeys throughout Ecuador.

Available Tours.

Frigata offers Andean mountain travel, Galapagos Islands tours, and birding expeditions. Frigata also arranges tours throughout Ecuador to accommodate individuals with special interests.

Two excursions are available for the Galapagos Islands and Andes itineraries. The first includes a chartered yacht to tour the islands. The second offers stationary accommodations at the Hotel Galapagos, with day trips to the islands, and hikes and horseback riding excursions on Santa Cruz Island. Each of these trips is followed by Andean mountain travel from Cotopaxi (the highest active volcano in the world) through Otovalo (noted for its indigenous people and handicrafts) to Tinalandia Lodge (noted for its subtropical forest avifauna).

A third itinerary is a birding excursion of Ecuador. This bird watching trip offers travel through the Sierra highlands, subtropical forests, coastal area, Amazon Basin, and the Galapagos Islands. The trip covers a wide variety of habitats for the more than 1,400 bird species found in the country.

Guide Services.

These trips are accompanied by Peter Hurley, naturalist guide and bird watcher. Other contracted professionals offer specific expeditions with Frigata, such as a special 1987 venture led by National Geographic staff photographer Sam Abell on a photographic expedition of Ecuador.

Technical Information

Frigata sends reading lists and a variety of technical information to each traveler, enabling the individual time for personal research to prepare for the Ecuadorian excursion. Bird lists, plant lists, reference books, and maps are made available to the individual while touring the country.

Promotion.

At the present time Frigata is in the process of promoting its Ecuador tours by making contacts with travel operators from the United States and Canada.

II.B.2. Nature-Oriented Establishments.

II.B.2.a. Hotel Anaconda.

Hotel Anaconda is located on the Rio Napo near Misahualli in Napo province. The hotel draws visitors to its rustic jungle cabins by offering jungle excursions. The grounds on the island surrounding the hotel are very well manicured and host several species of tame monkeys, wildpigs, deer, ocelots, and parrots.

Available Tours.

Tours offered at the hotel include visits to the surrounding indigenous and colonizer families, and treks through heavily cut rain forests. Other excursions include the use and construction of balsa rafts, visits to the local doctor who uses plants to treat the ill, and special trips to attempt sightings of alligators and the Hoatzin, a bird having prehistoric characteristics as a juvenile.

Guide Services.

The local guides for these excursions speak Quechua and Spanish, creating some language difficulties with international travelers. Yet these guides are able to point out the medicinal values as well as construction uses of local plants.

Technical Information.

The Hotel Anaconda presently does not offer its guests informational brochures, pamphlets, flora and fauna lists, or references.

Visitation.

Most visitors to the Hotel Anaconda have never been to the jungle. Many are there primarily to visit colonizers and indigenous communities. Scientists and special interest travelers with a desire to see primary forests and wildlife travel further into the Amazon Basin. The reason for this is that the colonizers and indigenous people have depleted much of the wildlife and forests to plant agricultural crops and raise cattle.

Promotion.

Promotion of the Hotel Anaconda is through an office in Quito, and through national travel agencies dealing with international wholesalers. The hotel draws a mixture of international visitors (approximately 55%) and Ecuadorians (45%). A number of international groups are accompanied by their own guides.

II.B.2.b. Flotel Francisco de Orellana.

The Flotel Francisco de Orellana is located on the Rio Napo at the town of Puerto Francisco de Orellana (Coca) in Napo province of the Amazon region. The Flotel Orellana is a flat-bottomed floating hotel operated by Metropolitan Touring. It has a bar and sundeck on the upper deck, offering good views of the river, its shores, and the inhabitants as it traverses the Rio Napo's shallow waters. Because of the river's shallowness it is necessary to travel in dugout canoes to reach designated tour stops that the Flotel Orellana cannot reach.

Available Tours.

The Flotel Orellana has two itineraries, each offering hikes into the jungle, visits to the Catholic Mission on Pompeya Island, an overnight stay at Limoncocha Lodge, lunch at Hacienda Primavera, and an excursion to Monkey Island. The Monday through Friday itinerary includes an extra day to visit Taracoo lake to observe large kapok trees in the tropical rainforest.

Guide Services.

The guides on these excursions are trained naturalist bilingual guides. They are knowledgeable about the avifauna, wildlife, and flora, stressing the importance of conservation for the region. A number of these guides are biology students at the University Catolica.

Each evening the guides present information for the next day's program, showing slides and giving brief lectures to enhance the visitors' understanding and knowledge of the Rio Napo area.

Technical Information.

Maps of the Rio Napo area are supplied. However, brochures, pamphlets, bird lists and plant lists are not yet available. Identification and reference materials may be borrowed from the naturalist guides. An anthropology book, written in Quechua and Spanish, may be purchased at Pompeya Island's Catholic Mission museum.

Visitation.

Visitors to the Flotel Orellana are mainly Ecuadorian nationals, comprising 68% of the travelers. Guides have noted that national tourists often show very little interest in the natural history attractions and conservation needs of the region. The Ecuadorian nationals vacationing on the Flotel are often disappointed with the rigid time schedules of the jungle excursions, preferring vacations that are more relaxing.

International visitors make up the other one-third of the Flotel Orellana's clientele. Of these travelers a large majority (95%) are from the United States. The remaining small percentage is mainly European, e.g., German and French. These international travelers include many groups of retirees, mainly couples, on sight-seeing trips. A few special interest groups,

such as bird watchers and alligator specialists, arrange trips on the Flotel Orellana. The majority of international tourists express a great deal of interest in the nature and its need for preservation.

Promotion.

Metropolitan Touring promotes the Flotel Orellana's jungle excursion nationally and internationally.

II.B.2.c. Limoncocha Lodge.

Limoncocha Lodge, visited by the Flotel Orellana clients, is also operated by Metropolitan Touring. It is reached by dugout canoe on the Rio Napo and then up Jivino River to a transport "jungle bus." The 15-minute ride ends at the two lodges, native in style with thatched roofs and bamboo walls. The rooms are dormitory-style and accommodate 50 visitors. The rooms have four to six beds and are lit by lanterns in the evening hours. The main lodge has cold water baths for every four people, while the other lodge has showers and toilets below the house. The screened in dining area overlooks the lake and serves excellent food prepared by the local people of Limoncocha village.

II.B.2.d. Rio Palenque Science Center.

Rio Palenque Science Center is located in the province of Los Rios on the road from Santo Domingo de los Colcrados to Quevedo. The center is owned and managed by Dr. Calaway Dodson, and consists of 100 hectares of primary forest with an additional

80 hectares in production of African oil palm, macademia, and other agricultural crops.

Rio Palenque has a field-station lodge with six dormitory rooms, two having private baths. Presently it has accommodations for as many as 26 people. Dining is in a community room with bench tables, and food preparation is overseen by Dr. Dodson. A small library of technical books is located in the dining hall for reference and research.

Infrastructure.

The 100 hectares of Rio Palenque's primary forest offers a criss-cross of nature trails, which feature a wide variety of flora and fauna species and habitats at elevations from 150 - 220 meters.

Technical Information.

Maps are provided to the guests indicating the road system, trail system, creek system, planted areas, primary forest area, lodge and private house and property boundaries. Also provided are bird lists (of over 360 species), butterfly lists (including 350 species), and herpetology and mammal lists. These lists were compiled by visiting scientists and the Dodson's. Additionally, the 1978 published identification reference, the Flora of Rio Palenque Science Center, written by biologists Dr. Dodson and Dr. Gentry, includes 1112 species of vascular plants. Also worth noting is the presence of one of the world's ten most endangered species of plants (declared by IUCN), the Rio Palenque mahogany (Persea theobromifolia).

Visitation.

Visitation consists of university groups, scientists, museum tours, and birding tours. University groups are from the Catholic Universities in Quito and Guayaquil. A number of tours are from St. Louis Botanical Gardens and Philadelphia's Natural History Museum. Several bird-watching tour guides use the center for short visits (including Peter Hurley of Frigata, and Paul Greenfield, who is presently writing a book on the birds of Ecuador).

Promotion.

Promotion of Rio Palenque Science Center is non-existent, except by word of mouth. Possible improvements and expansions being considered include remodeling of the lodge, hiring of a guide/manager for the center, and international promotion efforts.

Expansion and Improvements.

Improvements being considered for the lodge include the connection of electricity and the remodeling of the six rooms into first-class accommodations with private baths. The downstairs area will be closed in and made into field station lodging. This allows for dual accommodations, with lower rates for students and low-budget travelers.

Upon the completion of such improvements, the Dodsons are considering the hiring of a guide to also act as lodge manager

and tour guide. One possibility would be the hiring of a graduate student interested in conducting research at the center.

II.B.2.e. Tinalandia.

Tinalandia Lodge is located in the subtropical forests of Pichincha Province on the road from Quito to Santo Domingo de los Colorados. Tinalandia is well-known by bird watchers and lepidopterist groups for its 60 acres of jungle adjacent to a golf course, creating an edge effect and good viewing of birds and butterflies.

Accommodations.

Tinalandia has 25 rooms with hot water baths, and accommodates up to 50 people. A number of the rooms offer separate offices or desks as work areas.

Infrastructure.

A lounge for conferences and meetings is located off the golf course. Dining room, table tennis, and swimming pool are located near the main house. Several nature trails take the visitors through the varying habitats for bird watching.

Technical Information.

All technical information available has been compiled by past visitors who have left drawings of the trails, bird lists, and other information. Tinalandia does not provide any type of printed materials. However, reference books and literature are found in the lounge area.

Visitation.

The proportion of Ecuadorian visitors is low, perhaps only 20%. International visitors are mostly Americans (about 60%), the others coming mainly from Germany and elsewhere in Europe.

II.B.3. Conservation Organizations

II.B.3.a. Fundacion Natura.

For a number of years Fundacion Natura, a non-profit organization, has been working to promote the rational management of natural resources and environmental education on the Ecuador mainland. Fundacion Natura offers technical assistance and designs research projects for conservation management and conservation education.

The Pasachoa Protected Forest, managed by Fundacion Natura, is a model of conservation management, research, and application of environmental education. The protected forest has a wide variety of flora and fauna of the highland species native to the area. Students from the Catholic University of Quito conduct a variety of investigative research on the ecosystems at Pasachoa. To complement the nature-trails, Fundacion Natura also provides slide presentations, pamphlets, workbooks, and lectures for school children visiting the center.

II.B.3.b. Charles Darwin Foundation.

The Charles Darwin Foundation of the Galapagos Islands encourages scientific investigation and the development of

conservation programs. The Charles Darwin Station, located on Santa Cruz Island, also seeks funding for conservation programs, advises and gives technical assistance to the national parks on matters of conservation, and conducts training for the naturalist guides.

The station has played an important part in creating model conservation management schemes for the delicate ecosystems of the islands. A number of research studies are presently underway to determine the effects of tourism upon the wildlife species of the islands.

II.B.3.c. Tierra Viva.

Other conservation organizations, such as Tierra Viva in Cuenca, have been very effective in preserving certain areas such as Protected Watershed Matzan. These groups maintain a strong desire to preserve watersheds, forests, plant life, and wildlife. Tierra Viva also encourages environmental education and investigative research.

II.C. Survey of Tourists on Nature-Oriented Tours.

Some 62 tourists were surveyed during the three-month period from mid-September through mid-December of 1986. Of these tourists, 55% were visiting the Galapagos, 24% traveling on the Flotel Orellana, 10% visiting the Hotel Anaconda, and 11% touring the country with Etnotur.

II.C.1. Tourist Profile.

Of the tourists surveyed, 54% were North Americans, 35% Europeans, and 11% Ecuadorians. The international travelers stayed in Ecuador an average of 15 nights, with approximately 85% visiting the country for the first time. The male/female ratio was 52% to 48%, and the mean average age was 42. Approximately 60% of those surveyed indicated that they were married, the rest being single, divorced or separated.

The majority of travelers were employed full-time in a wide variety of occupations. Of these, 27% earned a family income between U.S. \$30,000 to \$60,000, before taxes, annually. Approximately one-quarter earned more than \$90,000 per year. About 30% had bachelors degrees, and a little over 10% had doctoral degrees. Only 16% had pursued education directly related to natural history.

II.C.2. Motivation of Tourists to Travel to Ecuador.

In descending order of importance the surveyed tourists' motivations for travel to Ecuador included: (1) recreation, entertainment, and sight-seeing; (2) visiting friends and relatives; (3) business; and (4) other. Concerning the decision to come to Ecuador, most (42%) made their own decisions, while others (34%) came because of recommendations made by friends. Only 5% stated that advertisements influenced their decision.

II.C.3. Satisfaction Levels.

The tourists indicated they liked the abundance of wildlife and the environment, the courtesy of the guides and, in a number of cases, the accommodations. Their dislikes included the lack of technical information such as bird lists, plant lists, maps, etc., in different languages. A few travelers indicated they were disappointed in the lack of professional lectures given by guides. A number of tourists on mountaineering trips stated their concern about the lack of adequate first-aid available on climbing and trekking tours.

II.C.4. Tourists' Knowledge of Ecuador.

Tourist knowledge of Ecuador's nature-oriented establishments, national parks and reserves is deficient. Approximately 78% of the tourists surveyed were not familiar with the names of the national parks and reserves on the mainland of Ecuador. About 71% of those surveyed did not recognize the names of the main establishments catering to nature-oriented tourism. These relatively high percentages are partially explained by the lack of available information at the destinations, and partially by the lack of promotional campaigns advertising Ecuador's tourist attractions.

II.C.5. Tourists' Expenditures.

Expenditures on lodging, transportation, personal expenses, and tour excursions averaged about U.S. \$1540 for a tour of 3-4 days. For tours of 5-9 days expenditures were approximately

\$2100. For stays longer than 10 days, expenditures exceeded \$3000. In a number of cases these figures reached \$4000 to \$5000 when Galapagos tours were combined with mainland tours.

III. SPECIAL PROBLEMS OF NATURAL HISTORY TOURISM IN ECUADOR.

Ecuador offers a wide variety for potential nature-related tourism. It has a moderate number of privately owned establishments catering to this line of enterprise. A large number of national parks and wildland reserves exist in the highly diversified regions of the country. An increasing number of travel agencies and operators offer nature-related tours.

However, Ecuador confronts a number of special problems in the development of ecological tourism. These include lack of nature-related information about the country, limited infrastructure at the nature-oriented establishments, management problems in national parks and wildland reserves, and deficient transportation and guide services.

III.A. Nature-Related Information About Ecuador.

The availability of useful literature about Ecuador's natural areas is limited. A variety of books do exist on the different regions, natural history, and indigenous communities of the country. However, these are often out of print; unavailable in different languages, or not suitable for traveling tourists. Technical references such as bird books, flora books, guides to natural areas do exist, but their availability to the general public is limited. This type of literature is very important to tourists with special interests in natural history, and enhances the traveler's perception of the country.

III.A.1. Tour Agencies and Operators.

III.A.1.a. Information Packets.

Tour agencies and operators send out informational packets to international agencies and wholesalers, indicating the different tour itineraries available. The quality of these range from full-color pamphlets (with itinerary information, transportation, and general travel information) to typed itineraries of offered tours.

Metropolitan Touring distributes full-color pamphlets to travel agents invited on familiarization tours. The firm also gives lectures and shows promotional videos about the different regions of Ecuador. This uniquely detailed presentation of the available tours is the most comprehensive yet offered in Ecuador. It gives facts about traveling to Ecuador, along with maps and information about each region of the country. A manual indicates the specific tours offered throughout the country. One section on special interest tourism focuses on archeology, agriculture, folklore, bird-watching, fishing, trekking and mountain climbing.

The majority of agencies provide information packets below the quality of those offered by Metropolitan Touring. They do indicate specific tours available in each region and travel facts. Yet most are not in the form of color pamphlets, nor do they supply maps of the areas to be visited.

III.A.2. Nature-Oriented Establishments' Availability of Technical Information.

Few establishments catering to nature-oriented travelers

supply technical information (Table I.). Of the many establishments visited, only the Galapagos Island cruises and Rio Palenque Science Center supplied maps, bird lists, plant lists and identification references. The Flotel Orellana supplies maps, and naturalist guides make their bird books available for reference. Tinalandia has reference materials such as maps and bird lists which have been drawn up by the visitors.

Table I . Available Technical Information at Nature-Oriented Establishments.

NATURE-ORIENTED ESTABLISHMENT	TECHNICAL INFORMATION					
	Maps	Fauna Lists	Bird Lists	Plant Lists	Slide Shows	Books
Flotel Orellana	X	-	-	-	-	X
Hotel Anaconda	-	-	-	-	-	-
Hotel Crespo	X	X	-	-	-	-
Rio Palenque	X	X	X	X	-	X
Tinalandia	X	X	-	-	-	-

III.A.3. Distribution of Technical Information by DITURIS.

DITURIS, the national tourism authority, plays an important part in distributing and producing many of the promotional materials about Ecuador. However, these materials are limited in quantity due to very low budgets.

III.B. Infrastructure of Nature-Oriented Establishments, Wildland Reserves and National Parks.

Nature-oriented establishments vary in the degree of their infrastructure and maintenance. Infrastructure in parks and wildland reserves, with a few exceptions, is generally unmaintained or non-existent. In both cases infrastructure refers to the development and improvement of access roads, visitor centers,

mountain cabins, visitor and preservation areas, nature trails, and active control and management programs.

III.B.1. Accessibility.

Accessibility to a number of regions is difficult and time-consuming. Roads are often hazardous and impassible during the rainy seasons. The main roads of the Sierra region are all quite good, offering relatively easy access to the various national parks and reserves there. In the Amazon region the roads are often impassible because of landslides. Sometimes access simply does not exist except through rivers using dugout canoes. The coastal region's road system offers relatively easy access to parks, reserves, and sport fishing.

Most national parks are limited to one or two access routes (Table II.). At the present time this has both a positive and a negative effect on control of the parks. Positively, it reduces the number of people deforesting and colonizing the area. Negatively, it limits the ability of park personnel to control the area.

III.B.2. Visitor Centers.

Visitor Centers at park entrances and wildland reserves exist on a very basic level, with a few notable exceptions (Table II.). The Galapagos Islands, Cotopaxi Park, and Pasachoa Protected Forest have visitor centers providing maps and information on the flora and fauna of the area, special features and attractions, nature trails, and other points of interest. Both

the Galapagos Islands and Cotopaxi National Parks have natural history museums.

III.B.3. Cabins.

Cabins for mountain climbers are basic, and do not have food or fuel supplies. Cabins in national parks generally do not exist (Table II.). However, in Cotopaxi National Park two A-frame cabins are available for park personnel, researching scientists, and by special arrangement. If more of these accommodations were constructed and made available to tourists, they might possibly increase park visitation and income.

III.B.4. Nature Trails.

Most existing nature trails in national parks and reserves, are self-guided. There is little written material describing the flora, fauna, and points of interest for users of the trails. An example of one reserve that has environmental education programs (Pasachoa Protected Forest) shows increased visitation by the families of the school children who have attended these programs.

Visitation areas in the national parks and reserves rarely feature anything other than nature trails. They lack designated camping and picnic areas.

Table II. Infrastructure within National Parks and Reserves.

NATIONAL PARKS/ RESERVES	INFRASTRUCTURE					
	Access Roads	Visitor Center	Cabins	Nature Trails	C a m p - ing Areas	Picnic Areas
El Boliche	X	X	-	X	-	X
Cajas	X	-	-	X	-	-
Cayambe-Coca	-	-	-	-	-	-
Churute	-	-	-	-	-	-
Cotacachi-Cayapas	X	X	-	X	-	X
Cotopaxi	X	X	X	X	X	X
Cuyabeno	X*	-	X	X	-	-
Galapagos Islands	X**	X	X	X	-	-
Machalilla	X	-	-	X	-	-
Pasachoa	X	X	-	X	-	X
Pichincha	X	-	-	X	-	-
Podocarpus	X	-	-	-	-	-
Pululahua	X	-	-	X	-	-
Sanguay	X	-	-	X	X	-
Yasuni	X*	-	X	X	-	-

* River Access (dugout canoe travel).

** Daily Cruises and Yacht Cruises.

III.C. Guide Services.

Establishments and tour operators offering nature-oriented tours generally supply guide services. The guides used on these tours vary from local indigenous guides to trained naturalist and professional guides.

III.C.1. Local Guides.

Hotels and establishments offering nature-related tourism often use local indigenous guides on excursions. These guides present the customs of the native people, and indicate plants used for medicine and for construction purposes. Even with this interesting depiction of the culture, the guides lack the scien-

tific knowledge of the flora and fauna, knowing only the Quechua names for the species. Language is also a problem with visitors who do not speak Spanish. A number of tour agencies compensate for this problem by sending bi-lingual guides on these excursions.

III.C.2. Naturalist Guides.

Several tour operators and agencies supply trained naturalist guides on their mainland tours. These guides, and the Galapagos guides, are capable of presenting natural history aspects of the areas visited. In many cases the guides are students who do not continue guiding as a profession. This causes a high turnover rate and reduction in the number of qualified guides. This high turnover rate and reduction causes the agencies to hire foreign nationals as guides.

III.C.3. Professional Guides.

The number of professional guides in Ecuador is rising due to the increasing demand for high-quality special interest tourism. These guides are highly specialized in areas such as mountain climbing, bird watching, archeology, fishing, etc. Many if not most are self-employed, but work for a number of tour agencies with special interest tourism.

III.D. Air Transportation.

The ease or difficulty experienced in which travelers experience to get to and from their destinations affects overall satisfaction levels. Air transportation, especially to the

Amazon region, has proven to be highly irregular and uncomfortable. The airline, Tame, which services Coca and Lago Agrio, is often hours late or simply does not arrive.

III.F. Promotion.

One of the foremost problems in Ecuador's tourism industry is the absence of promotional campaigns. Ecuador is famous for the Galapagos Islands, but nature-oriented tourists visiting the islands often do not realize that Ecuador's mainland has a number of natural history attractions. These attractions could be used as add-on excursions or used to draw repeat visitation to Ecuador.

III.F.1. National Level.

On a national level, promotion of natural history tourism by tour operators is relatively low. This reflects, in part, the moderate level of national interest in this type of tourism. Until the Ecuadorian public becomes more cognizant of disappearing wildland areas through environmental education, domestic tourism will remain low.

III.F.2. International Level.

International promotion of tourism has been only superficially touched by tour agencies and operators. Promotion of Ecuador's attractions has been mainly through wholesalers and contacts made at the travel industry convention, El Mercado. A few travel agencies such as Metropolitan Touring, have associate

offices in the United States and Europe, promoting Ecuadorian travel.

Travel Industry Conventions.

El Mercado, held in Guatamala this past year, allows attending tour operators the opportunity to make new contacts. These contacts generate increased business between countries, and in a few cases lead to new marketing and promotional partnerships. However, the number of attending tour operators and agencies from Ecuador remains relatively low.

Airlines.

Promotion of Ecuador's natural history attractions by Eastern and Ecuatoriana Airlines is almost non-existent. A number of articles are written about the Galapagos and presented in in-flight magazines. However, at the present time these airlines do not promote natural history tourism as marketing strategies.

IV. SUMMARY AND CONCLUSIONS.

IV.A. Recommendations for Nature-Oriented Tourism Development.

Due to the recent analysis of the tourism industry in Ecuador, the Strategic Tourism Market Plan for Ecuador (December, 1986) by Chuck Gee and Edward Coe, the following recommendations are targeted at the development of natural history and special interest tourism.

IV.A.1. Formation of Public/Private Sector Committee to Aid in the Development of Nature-Related Tourism.

The formation of a national public and private sector committee is recommended to assist in the development of nature-related tourism. This committee will generate ideas, propose short and long-range goals, and seek funding for implementation of specific projects. This committee will be representative of tour operators, conservation organizations, national tourist authorities, and national park administrators. The committee's primary functions include the following:

IV.A.1.a. Promotion of Ecological Tourism.

The promotion of ecological tourism to governmental committees and councils involved in tourism development is necessary to direct interest towards the development of parks and reserves. This political and private sector involvement in the development of national parks and reserves could increase promotion nationally and internationally. Such promotional encouragement should lead to the development of infrastructure

such as nature trails, camping and picnic facilities, visitor centers, and private sector involvement through the operation of restaurants and concessions.

IV.A.1.b. Development and Implementation of Pilot Projects.

The committee will also organize pilot projects and the appoint task groups to plan, conduct, and manage the projects. An example would be the draft of an infrastructure project for Protected Forest Pichincha, including cabin construction, implementation of concessions, visitor centers and nature trails.

IV.A.1.c. Solicitation of Funds for Model Projects.

The committee should seek ways to fund the development of pilot projects. Possibilities range from university research grants to donations by conservation organizations.

IV.A.1.d. Development of Publications and Useful Technical Information.

The committee will encourage the production and distribution of maps and publications for promotion and technical information, to be used at nature-oriented establishments, national parks and reserves, and by tour agencies and operators.

IV.B. Development of Infrastructure in Nature-Oriented Establishments, Wildland Reserves, and National Parks.

Until recently the national parks have discouraged visitation and development of infrastructure in parks. The government now is changing its views on this matter, and sees the importance

of visitation, promotion, and park development. The introduction of the private sector to operate concessions, restaurants, cabins, and horseback riding will increase park visitation and revenue, allowing for further infrastructural development and increased resource management.

IV.B.1. Environmental Education.

Environmental education programs, such as those used at Pasachoa Protected Forest by Fundacion Natura, could usefully be broadened on a national level. These programs should be used not only with school children, but also with land owners and the general public.

IV.B.2. Guide Training.

Training for tour guides is essential to the tourism industry. Tour guides, in many cases, determine the quality and satisfaction levels of tourists. Only the Galapagos guides and a number of Amazon guides receive intensive training and are licensed. A large number of local guides, who are not licensed, lack scientific knowledge, people management skills, and language capabilities. A program is recommended to train guides in areas such as natural history, people management, and communications. This program could be headed by DITURIS and the Catholic University, both of which are already active in guide training programs. In conjunction with the guide training program, conservation organizations should also play an important part in the program to stress the importance of conservation to the guides. The cost for the training program could be included in the course

price, to be paid by those attending the course. Those passing the course should receive guide licensing, with follow-up training required in order to retain the license. Such program would greatly improve the quality of guides within the country.

This obviously raises a problem with local guides who cannot afford to attend courses. These guides should still receive training in conservation. This cannot be stressed enough, due to evidence that some local guides in the Amazon region take tourists into national parks on hunting trips without permits.

IV.B.3. Patrol of National Parks and Wildland Reserves.

Due to low budgets the national parks system has difficulty adequately patrolling lands within its jurisdiction. It has been suggested that the military become involved. However, in many cases, this could present a negative image and experience for tourists. An alternative solution is control of the quality of guides by licensing, and eventual budgeting increases to provide for increased park and reserve control and management.

IV.B.4. Technical Information.

The importance of technical information cannot be stressed enough. Experts in natural sciences, photography and graphic design are needed to develop colorful brochures, pamphlets and reference lists. These written and visual aids should be produced for particular regions, establishments, reserves and parks. The costs of production and distribution could be

included in tour costs, or recovered at modest prices for the materials.

IV.B.5. Promotional Efforts.

Promotion of Ecuador and its natural history should be directed at capturing special interest travelers. Such promotion could include articles published in specialty magazines and journals, brochures and announcements sent to conservation societies and associations, and the promotion of educational travel such as conferences and study tours.

One recommendation is that travel writers and photographers be given an adequate orientation to the natural history aspects of the country, including destinations in addition to the Galapagos Islands. DITURIS and the private tour operators should later ensure that articles and photographs are published.