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TOURISM

THE TOURISM OBSERVATORY OF GALAPAGOS: A MONITORING SYSTEM FOR THE NEW MODEL OF ECOTOURISM

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*The **Galapagos National Park Service** has its headquarters in Puerto Ayora, Santa Cruz Island, Galapagos and is the Ecuadorian governmental institution responsible for the administration and management of the protected areas of Galapagos.*

*The **Governing Council of Galapagos** has its headquarters in Puerto Baquerizo Moreno, San Cristóbal Island, and is the Ecuadorian governmental institution responsible for planning and the administration of the province.*

*The **Charles Darwin Foundation**, an international non-profit organization registered in Belgium, operates the Charles Darwin Research Station in Puerto Ayora, Santa Cruz Island, Galapagos.*

***Galapagos Conservancy**, based in Fairfax, Virginia USA, is the only US non-profit organization focused*

exclusively on the long-term protection of the Galapagos Archipelago.



Photograph: © M. Verónica Toral Granda / WWF Galapagos Program

The Tourism Observatory of Galapagos: A monitoring system for the new model of ecotourism

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An effective system for planning and management is necessary for the sustainable development of any tourism destination. In the case of the Galapagos Islands, a protected area with a unique terrestrial ecosystem and one of the most important marine reserves in the world, this system is particularly important. How can the various stakeholders monitor the positive and negative impacts of the tourism industry and make sound decisions to promote the new model of ecotourism in Galapagos? The Tourism Observatory of Galapagos (TOG), one of the four components of the new model of ecotourism (the other components include strengthening governance, reengineering the destination, and market positioning), can play a key role in this regard.

The TOG is a technical tool designed to generate monthly information to be used in planning and managing tourism at both local and regional levels. It was formally established in January 2011, by Resolution No. 3 of the Governing Council of the Galapagos (CGREG, for its initials in Spanish). This resolution also established the Technical Committee on Tourism for Galapagos, whose members include: representatives from the Ministry of Tourism, Galapagos National Park Service (GNPS), CGREG, and the National Secretary of Planning and Development (SENPLADES); a representative from each Galapagos municipality; a delegate for all of the Galapagos parishes, and a delegate from the private sector. The Ministry of Tourism coordinates the Committee, which provides recommendations to the CGREG regarding decision-making, public policy, and regulations for the development of ecotourism in Galapagos.

The Observatory was the first concrete result of the new model of tourism for Galapagos, thanks to the contribution of the Ministry of Tourism, the GNPS and the CGREG, among other institutions, and the support and assistance of WWF. The TOG became operational in June 2011, and since then has collected and analyzed monthly data on indicators of the supply and demand and social and environmental impacts of tourism. One of the main products of the Observatory is a database that facilitates up-to-date analysis of the state of tourism and the identification of trends related to the development of this activity in Galapagos. This system integrates information generated by other monitoring systems, such as the Integrated System of Galapagos Indicators of the CGREG, which contains social and demographic indicators, the Transit Control Cards (TCC), and the database of the Visitor Management System (SIMAVIS) of the GNPS.

Day-to-day activities of the Tourism Observatory of Galapagos

The TOG obtains primary information from a monthly sample consisting of 400 surveys made directly to tourists at the Baltra and San Cristóbal airports at the end of their visit. This information provides demographic and psychographic

profiles of the tourists, and information related to their spending levels in the islands, their expectations upon arrival in Galapagos, and their level of satisfaction as they leave. The survey also covers additional information on the behavior of visitors and the number of nights they spend in Galapagos.

The TOG also collects information through surveys of establishments that offer different tourism services in the towns of Galapagos in order to monitor the behavior of the businesses and the quality of service offered to tourists. The principle indicators measured include commercial activity, types of services and activities offered, details of the customer profile, and information on vendor chains.

Additionally information is collected on other productive activities linked to tourism such as fisheries, agriculture and general commerce.

For hotels, cruise operators, restaurants and bars or nightclubs, the TOG collects data on indicators such as total number of berths/beds/seats and occupancy rate. With this information it is possible to compare the number of berths on cruise boats and the growth in the number of beds in the population centers (Figure 1). The surveys also indicate whether these establishments engaged licensed naturalist guides and document the number of tourists served/attended to during the previous month.

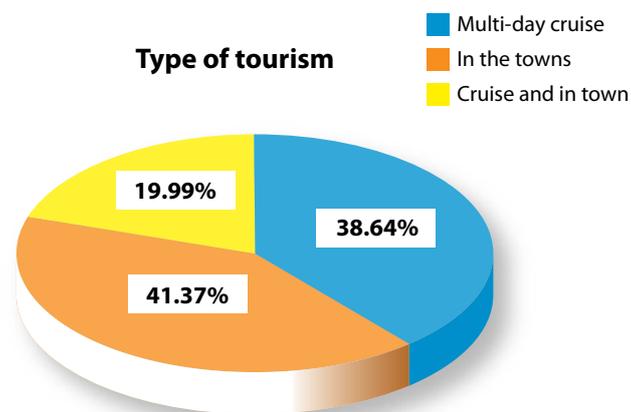


Figure 1. The percentage of visitors doing tourism on multi-day cruises, in the towns, and with a combination of cruise and towns. Source and elaboration: MINTUR, Tourism Observatory of Galapagos.

Using social indicators, the TOG obtains data on the percentage of tourism establishments that hires staff to provide tourist services and the gender ratio of such staff (in order to determine if there is gender equity in employment opportunities). Information is also collected on the level of preparation or training of personnel that serve tourists. Since there is considerable turnover of personnel among Galapagos businesses, this system also measures employee tenure and motives for leaving.

One of the main reasons the TOG was created was to provide monthly monitoring of environmental impacts generated by tourism in the islands. To collect this information, the TOG works with secondary data provided by partner institutions and those belonging to the Technical Group of the Tourism Observatory. The GNPS is the main source of information on the environmental impacts of tourism in the archipelago. Other information sources also exist, such as RELUGAL, a company which recycles used oil and thus can provide monthly data on the number of gallons of lubricating oil collected. Petroecuador also provides information on the amount of gasoline distributed monthly to the various public institutions and commercial sectors of Galapagos. Austrogas, the distributor of propane in Galapagos, provides data regarding the number of gas cylinders distributed by type (domestic vs. industrial use) and by

island. Agrocalidad, another ally, provides information to the TOG on the amount of organic cargo (in kg) inspected prior to its entry into Galapagos and on the controls they conduct associated with inter-island travel.

The municipality of Santa Cruz, through its Environmental Directorate, provides the TOG with data on the amount of solid waste produced and collected on the island, and its classification by type (recyclable, organic, non-recyclable, scrap metal, brush, tires, and cement) and by sector (commercial, residential, tourism, municipal, and other). The GNPS provides monthly visitor numbers at each of the visitor sites and the total number of visitors entering Galapagos by origin (domestic and foreign) and nationality.

In addition to using this information to better understand the profile of tourists, supply considerations, and social and environmental trends, the TOG uses it to develop reliable projections and econometric analyses. An example is the projection and modeling of monthly and annual growth in the number of visitors to the islands (with an accuracy level of 99.5%; Figure 2). It is also possible to project the growth of hotel beds in the towns, to make annual comparisons for all indicators, and to determine how the environmental pressures in both visitor sites and population centers are expected to increase.

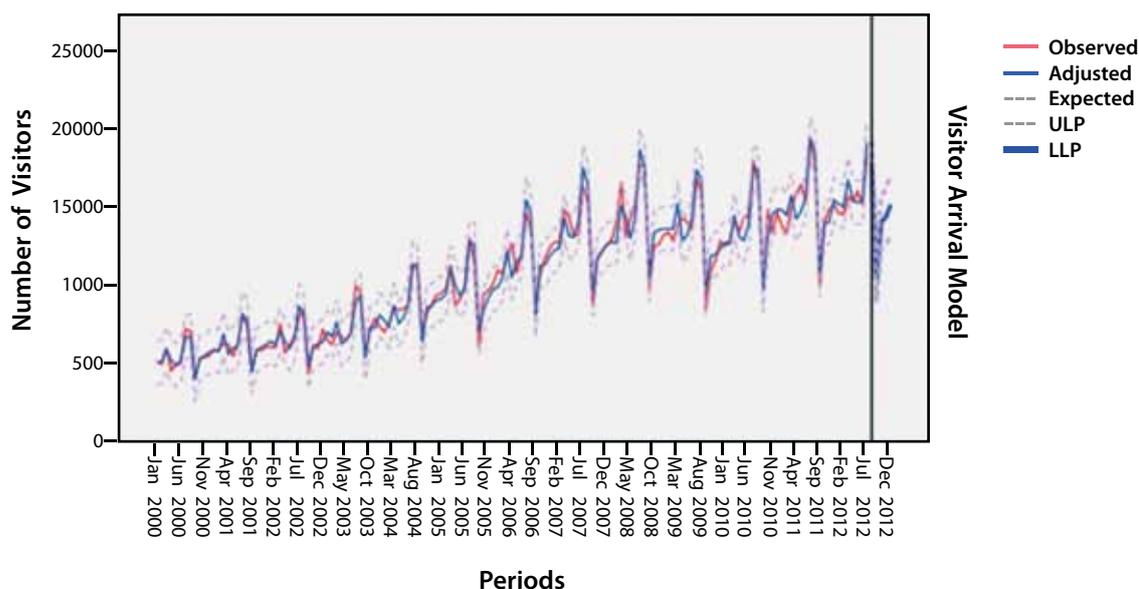


Figure 2. Projections on the number of tourists arriving in Galapagos according to data generated by an application of the Tourism Observatory of Galapagos. **Observed** = the actual number of visitors that entered for the period for which data were used to make the projection; **Adjusted** = curve generated from the projection model (Winter's Model), where the projection is adjusted to real data; **Expected** = projection of visitor numbers for 2012 (the projection is indicated beyond the vertical black line); **ULP** = upper limit of the projection (i.e., the projected value can be given a higher value - the upper limit for a projection interval); and **LLP** = lower limit of the projection (i.e., projected value can be given a lower value - the lower limit for a projection interval). Source and preparation: MINTUR, Tourism Observatory

The TOG gradually has become an important source of information and consultation for private and community stakeholders of local tourism and members of the Technical Group, as well as other institutions, universities and individuals who are doing research in the islands. The TOG database allows for the creation of personalized products and analyses required by each institution.

Dissemination of results

Information from the TOG is currently summarized via monthly, quarterly and annual reports and is available to businesses and organizations in Galapagos and mainland Ecuador, at the offices of the Regional Directorate of the Ministry of Tourism.

The first quarterly newsletter was printed in June 2011 and in 2012 such information will be available on a website that is currently under development. In the future, greater collaboration is needed with other institutions in Galapagos that possess important secondary information on economic, social or environmental issues that will facilitate additional analyses, projections and econometric studies.

The TOG is the first tourism monitoring system in Ecuador. Other important tourism areas in Ecuador, such as the Ecuadorian Amazon, have expressed interest in replicating it. Thanks to this system, for the first time updated information on the impact of tourism in Galapagos is being monitored, analyzed and disseminated. It has also gradually generated greater participation of the public and private sectors and civil society in decision-making processes.

Conclusions and recommendations

To optimize the impact of the Tourism Observatory as a tool for effective tourism planning in Galapagos, it is essential to operationalize the Technical Committee on Tourism for Galapagos. This will allow for greater analysis of information, the identification of critical indicators of tourism impact (both positive and negative), and decision-making at the level of public policies, programs and projects, and timely activities.

The information collected and analyzed to date identifies several challenges for the implementation of the new model of ecotourism in Galapagos. The information shows that Galapagos is not currently recognized (or positioned) as an ecotourism destination, but rather as a more traditional destination offering sun and beach. This issue should be raised with decision-makers so that policies are adopted that will lead to the development of ecotourism in Galapagos.

It is recommended that the following key actions be taken to strengthen the Tourism Observatory:

- Operationalize the TOG website. The TOG generates a large amount of monthly information that is impossible to summarize in print and in online reports. An online information platform is being developed that will allow tourism stakeholders to access information efficiently and each member institution of the Technical Committee on Tourism for Galapagos to perform its own analyses according to need. It remains to be determined if this requires strengthening the TOG or strengthening the capacity



Photograph: Zorica Kovacevic

of each member of the Technical Committee on Tourism.

- Disseminate the principle results of the TOG in the media, especially those related to key indicators related to supply and demand and social and environmental aspects of tourism. This is needed to generate greater awareness about the reality of tourism in Galapagos.
- Prepare specialized information for institutions and authorities according to their specific requirements.
- Use the information generated to create tourism development scenarios, as well as growth projections based on key indicators.
- Develop articles, reports and other research papers based on the information obtained by the TOG.
- Use the information generated to create tourism development scenarios, as well as growth projections based on key indicators.
- Convert the TOG into the main resource for technical information to support decision-making regarding tourism in Galapagos.
- Position the TOG as the first national observatory and collaborate to develop other tourism observatories within the country. This will require sharing information generated by the TOG with organizations on the mainland.
- Based on the results obtained, improve methodologies and incorporate new monitoring indicators on the four inhabited islands to help understand the real impacts (positive and negative) of tourism in each island.