



# Diagnosis of the tourism offer in the province of Imbabura

## Diagnóstico a la oferta turística de la provincia de Imbabura

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**Resumen** — La presente investigación desarrolla una línea base de la oferta turística de la provincia de Imbabura con la finalidad de llevar adelante acciones que mejoren los indicadores actuales. La información proviene de todos (censo) los establecimientos privados registrados en el catastro levantado por el Ministerio de Turismo provincial. Se contó con el apoyo de estudiantes universitarios previamente capacitados quienes aplicaron un cuestionario dirigido a los responsables, propietarios y gestores de los negocios. Los subsectores objeto de estudio fueron: alojamiento, alimentos y bebidas, agencias de viaje o intermediación y transporte turístico de pasajeros. Con esta información se pretende diagnosticar la situación del sector, para fortalecerlo desde la perspectiva administrativa y de marketing, uniendo academia, sector público y privado. En los resultados de la investigación se evidencia que el sector turístico de Imbabura requiere una gestión efectiva en el área de mercadeo para potencializar el sector y posicionar a la provincia como una marca. El turismo debe alinearse al sello Geoparque, proyecto que tiene un enfoque de educación, conservación y geoturismo.

**Palabras clave** — diagnóstico, oferta turística, establecimientos turísticos, marca, proyecto geoparque.

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**Abstract** — This research develops a baseline of the tourism available in Imbabura for the purpose of implementing actions that improve the current indicators. All the data collected come from private businesses registered in the land registry (census) compiled by the Ministry of Tourism in the province of Imbabura. A group of previously trained university students administered a questionnaire to managers and business owners. The subsectors under study were: accommodation, food and beverages, travel agencies or intermediation, and tourist transportation. By using this information, it is intended to diagnose the current situation in the province to strengthen it from an administrative, sustainable and marketing perspective, uniting academia, public and private sectors. The results show that the tourism industry in Imbabura requires effective marketing strategies and environment to enhance the sector and position the province as a brand. Tourism must be aligned with the Geopark initiative, a project that focuses on education, conservation, and geotourism.

**Keywords** — diagnosis, tourism offer, tourist establishments, brand, geopark initiative

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## INTRODUCTION

This research developed a baseline with information from private tourism companies in the province of Imbabura. A theoretical approach was used in the first instance, making reference to the development of rural tourism and taking into account that Imbabura, also known as the province of lakes, possesses impressive natural landscapes and a significant cultural heritage; then, the progress that businesses have had regarding the development of marketing plans was reviewed, in which specific projects related to the incorporation and use of information and communication technologies (ICT) were included.

The strengthening of the sector is integrated into the second axis of “Toda Una Vida” (a lifetime) National Development Plan framework on economy at the service of society (Secretaría Nacional de Planificación y Desarrollo - Senplades, 2017), whose objectives seek to: consolidate sustainability and strengthen dollarization; promote productivity and competitiveness for sustainable economic growth in a redistributive manner; and, develop productive capacities from the environment to achieve sovereignty and comprehensive rural development. In addition, tourism is essential for the development of productive processes in Imbabura, where a long chain of activities involved converges. Imbabura was declared by UNESCO as a World Geopark on April 17, 2019, for which the marketing distinction is being built. In this regard, Imbabura has a special mention in the formation of the Imbabura Geopark brand (Hart, 2015) (Hart Robertson, 2016).

Taking these considerations into account, the objective of this research is to contribute to marketing planning and sustainable-integral management of medium-sized, micro, small companies, and popular economic units which offer tourist products and services in the province; this from a diagnosis or baseline of the current situation in which these business ventures find themselves, and delving into those aspects related to management, promotion, and sales of the products and services that they offer.

In this context, the interaction of physical, natural and social elements of rural tourism makes its management and handling complex (Nyaupane, 2011). Rural tourism, although it is not a business that generates high profitability, it represents an economic and social alternative for important sectors in the province and various localities. Accompanied by significant difficulties due to processes of consolidation in the province, the presence of informality in important areas of tourism is just an example of the challenges the sector has to face. Additionally, it should be highlighted that there are no institutions that, apart from controlling, generate incentives for tourism strengthening.

As some authors point out:

“... the rural tourism sector does not only focus on supply and demand volumes achieved, but also on its capacity to contribute to the sustainable development of economies and, specifically, to the sustainable development of rural areas...” (Del Barrio García, Moreno, & Jamilena, 2012, p. 104).

Rural tourism, although it suffers from important limitations, it has become a relevant sustainable



alternative compared to other extractive sectors such as mining, oil, even agriculture whose economic viability has been questioned. Regarding rural tourism, Muñoz makes reference to the following:

“... a very important sustainable alternative to mining and oil that threaten conservation... tourist services offered by local communities have low quality standards... Informal activities are often the norm... unregistered houses that offer accommodation, unlicensed tour guides, among others. This situation entails... the decline of the tourist destination in terms of sustainability. There are... limitations in the institutions responsible for the control and management of tourism activity”. (Muñoz A., 2017, p. 111)

Rural tourism continues to be an alternative for many households that have seen in this activity the possibility for employment and more income that allows them to mobilize socially. The role of the State in promoting the sector is important for the communities directly linked or not to tourism activity, since it represents a source of income for the State. In this regard, Barlybaev (2009) affirms that:

“Today in many countries, the tourist industry falls into the category of state priorities which ...projects and programs providing various stimuli... tax benefits,... and the creation of conditions favorable to investment...” (Barlybaev et al., 2009, p. 639)

According to Muñoz (2017), The main modalities of rural tourism are adventure tourism, community tourism and bird watching. Additionally, other authors take into account, as a criterion for study, the difference in the stages of evolution of tourism according to Butler's life cycle.(1980).

A tourist destination is a complex product, including a number of resources that outline tangible and intangible heritage (Carballo, Fraiz Brea, Araújo Vila, & Rivo López, 2016, p. 370). What is commercialized in the market is the tourist experience which is synthesized in the destinations. Commercializing the territory implies a process in which all socioeconomic agents are involved: residents, public managers, small and micro-enterprises, popular economic units, non-governmental organizations, and others. The tourist experience includes intangible matters such as the interaction between visitors and residents; in other words, local communities are part of what tourists want to experience (Meiriño et al., 2016).

In this context, the use of ICTs in daily life is continuously increasing, being also present in tourism ventures, although not with such intensity. Regarding the introduction of ICT in tourism, several studies have been conducted, among which are: Caro (2008), Duffy (2010), Scholochow (2010), Santillán -Nuñez (2015), Seric (2011), Campora (2013), Cruz (2014), Leal (2015), who use different approaches in each geographical area.



## MATERIALS AND METHODS

This is a descriptive, qualitative and quantitative research. The instrument to gather the information was a questionnaire administered to the sampling frame (census), that is, to all the 413 private tourist businesses registered in the land registry of the Ministry of Tourism, which included companies and enterprises from urban and rural areas; that is to say, all those subsectors that provide accommodation, food and beverages, travel agencies or intermediation and tourist transportation. The questionnaire was administered in June 2018 and it was divided into seven blocks: general data, degree of access to financing and insurance, degree of compliance with obligations, degree of implementation of marketing activities, technological equipment, training and perception to international tourism. The questions used in the questionnaire were open and multiple-choice type questions. The information was processed with the SPSS statistical software, which allowed to conduct a descriptive analysis based on measures of central tendency and correlations in order to determine the association between variables that influence tourism in the province.

## RESULTS

In general terms, it was observed that tourist services offered by local communities in the province of Imbabura have low quality standards; however, the activity seems to be profitable for those who are involved in offering goods or services in the sector. Small businesses engaged in tourist activities in the province as well as enterprises belonging to the popular and solidarity economy were found to be at an initial or incipient level of development. Other large-scale companies, coexisting with these small businesses, generate employment in the formal sector, so they were also part of our study.

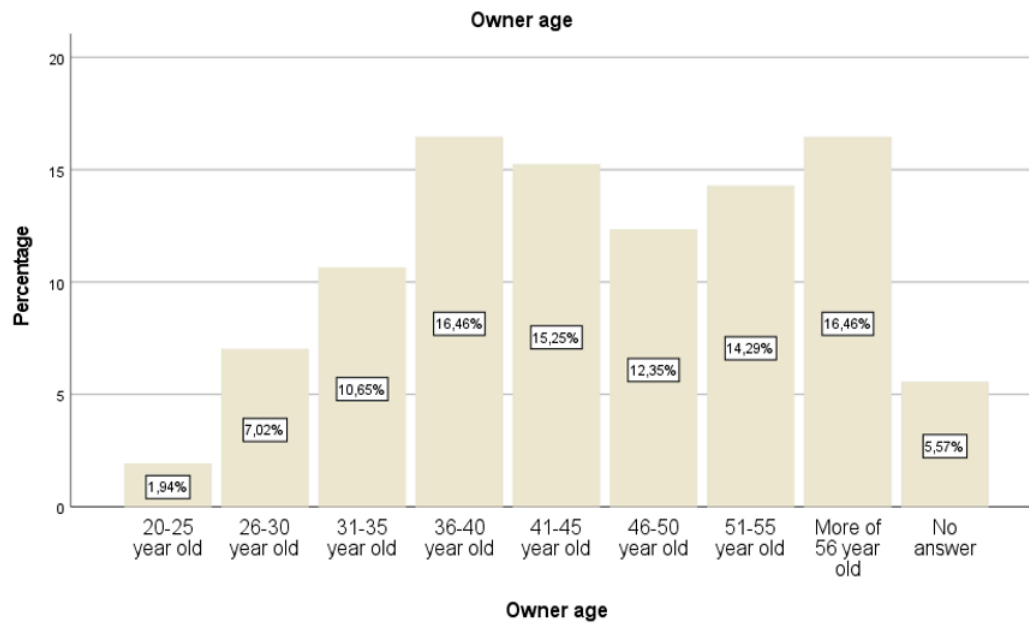
This research highlights the importance of an organizational structure within the province of Imbabura seen from a different perspective. An organization as such should not be considered as a simple division of labor or limited to independent production units that generate different products for self-consumption or urban markets; on the contrary, it is a modality in which within a limited geographical area, in this case the province of Imbabura, such units are articulated with rural or urban businesses that take advantage of natural and cultural resources as territorial public goods to develop a varied and diverse range of goods and services, including tourism (Loterio, J., Ardila M., Gómez, A. 2008).

The information gathered in this research comes from representatives of tourist establishments registered in the Ministry of Tourism of Imbabura. The most important aspects of this data are analyzed below.



**Figure 1.**

Age of the business owner.



Source: Data collected by the authors.

More than 51% of tourist business owners in Imbabura range between the ages of 20 and 45 years old, 43% are between the ages of 46 and over 56 years old; however, 5.57 % did not respond to this query.

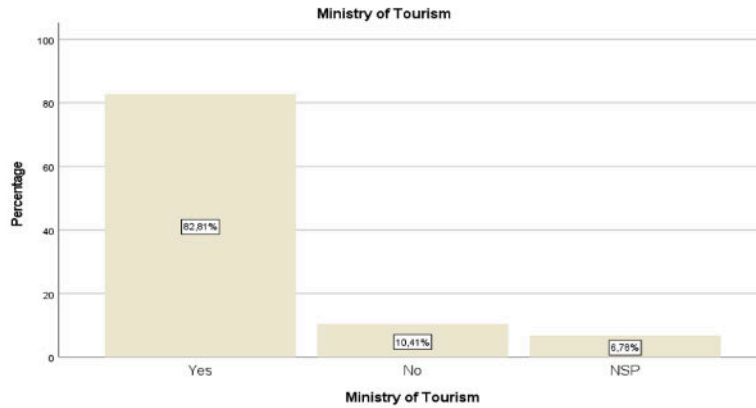
The data suggested that there is an important presence of new business owners in the tourist sector in our province, as well as those people who have already had their establishments for many years.

Respondents were asked about the business registration in the Ministry of Tourism (see figure 2). It was verified that 17,19% of the tourist establishments operating in the province of Imbabura are not registered. This reveals that there is not a regular updating of cadastral information.



**Figure 2.**

*Establishments registered in the Ministry of Tourism.*

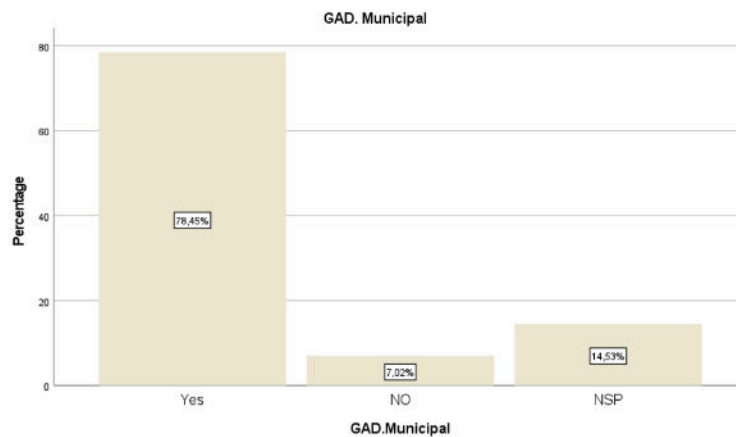


Source: Data collected by the authors.

When asked about their businesses being registered in the Municipal Decentralized Autonomous Government (GAD) of their jurisdiction (see figure 3), there are 22% of tourist establishments in operation that are not registered.

**Figure 3.**

*Establishments registered in a Municipal GAD.*

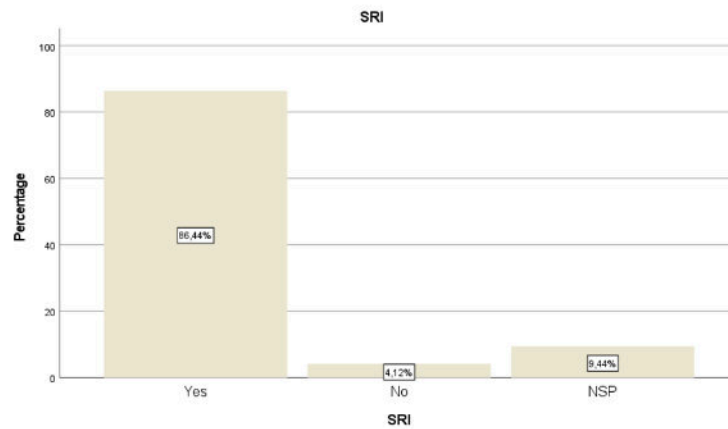


Source: Data collected by the authors.



When asked about the registration of all economic activities required by the Internal Revenue Service (IRS) (see figure 4), 86.44% of the establishments are registered, but there is a percentage of 13% that is not. This shows a better tax culture achieved within the sector.

**Figure 4.**  
*Establishments registered at the IRS.*



Source: Data collected by the authors.

Concerning geographical location in which tourism businesses in Imbabura are operating, figure 5 shows the following:

**Figure 5**  
*Establishment location*



Source: Data collected by the authors.

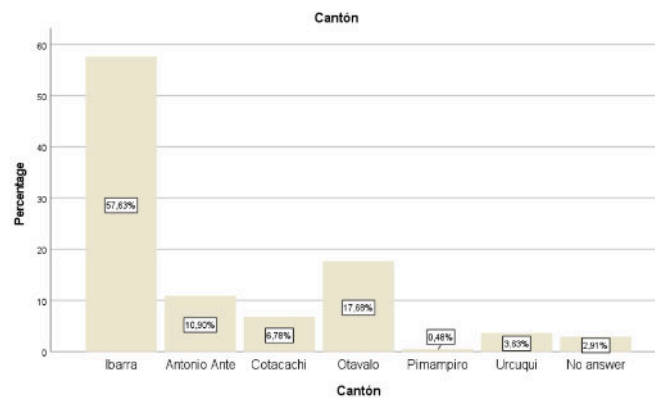


80% of the surveyed businesses are operating in the urban area of the province, while 20% of them are developing tourism enterprises in rural areas, especially in the cantons of Urcuquí, Pimampiro and Cotacachi.

When analyzing the concentration of the businesses in the sector at a cantonal level, this is what it was possible to verify.

**Figure 6**

*Establishment location at a cantonal level*

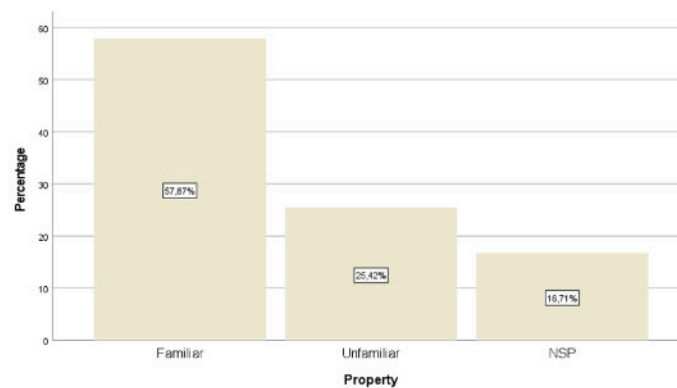


Source: Data collected by the authors.

Most of the tourism offer is concentrated in Ibarra with a 57.63%, and Otavalo with a 17.68%. The other percentages show the presence of new ventures and investments in the tourism sector in other cantons, like Antonio Ante, Cotacachi, Pimampiro and Urcuquí. Regarding tourism business ownership (figure 7), 58% of them are family-owned and 25% are institutions with legal status.

**Figure 7**

*Business ownership type*



Source: Data collected by the authors.

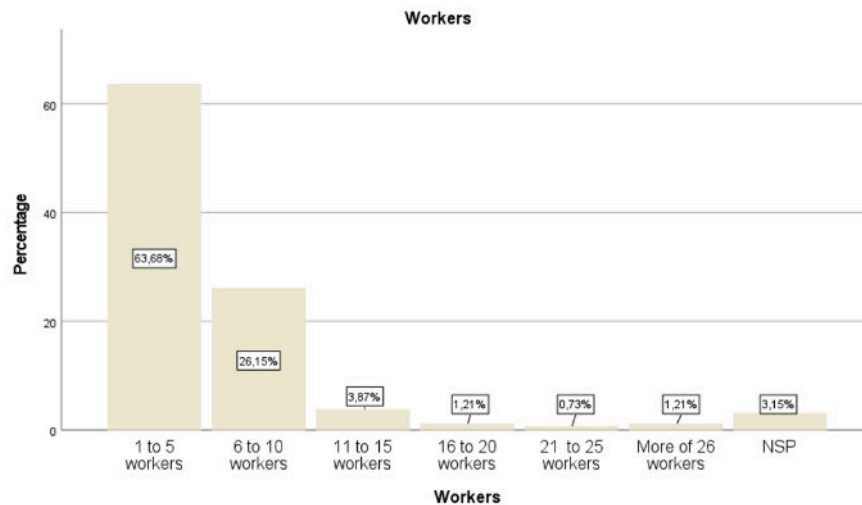




Concerning the number of employees that tourist businesses have, the following was verified (figure 8).

**Figure 8.**

*Number of workers*



Source: Data collected by the authors.

The majority of businesses, specifically 63.68%, have between 1 and 5 workers, followed by a 31.23% of establishments that employ between 6 and 10 workers. These percentages show that most of the establishments are small businesses in a growth process.

When asked about the type of activity workers perform in tourism businesses, 69.25% (up to 5 employees) carry out multiple activities. In other words, the smaller the establishment, the greater the percentage of workers who perform multiple tasks.

With reference to financing, the information obtained shows that tourism entrepreneurs work with self-financing (32.45%), family loans (11.38%), formal private financing (16.22%), public (4.12%), informal financing (0.24%), and no financing. 35.59%. In order to obtain formal financing, owners grant a mortgage and personal guarantees, with established terms and conditions of up to five years, supported by banking institutions, credit unions, and the National Financial Corporation. Financial administrative management is carried out through a financial advisor, specialist in the areas of accounting, taxes and labor.

With respect to the marketing area, the tourism sector uses few marketing strategies. The information indicates that owners do not have a marketing plan (53.03%), while 31.96% do have a marketing plan and 15.01% of them did not give any comment in that regard. There is evidence of high interest in promoting contact between the market and customers through technological means such as the Internet and social networks, to position the image of Imbabura as a tourist destination. Tourists get in contact with establishments through various means such as specialized



search engines (19.85%), tourism digital databases (16.46%), through travel agencies (8.23%), from referrals (18.4%) and no tourism reference at all (37.05%).

Regarding international tourism, language and cultural differences were found to be the main barriers. 56.90% of tourists indicated that they had problems with the language while 39.71% of them said they didn't. 3.39% did not respond to this query.

The study determined that 68.45% of the respondents who provide tourist services, think that they should be trained in marketing matters, 15.53% think that it is not necessary and 16.02% did not make any comment on it. 48.67% of the tourist demand think that the information provided in social networks is very reliable, and 35.59% said it was reliable.

Carnival was found to be the most visited holiday with a 34.87%, followed by Christmas with 11.38% and then Easter and New Year's Eve with 5.8%, respectively. Businesses do not receive any feedback from their clients, they do not work with tour operators, they lack a marketing plan, managers know the competition, accommodation is the most demanded product, associativity is considered an important strategy, although they do not participate in joint activities, the State (central and regional governments) does not support tourism industry, and ordinances are not beneficial for the tourism sector.

The sector requires training for personnel in accounting, administrative, financial, language and marketing areas to professionalize and improve quality standards according to the demands of new generations and current trends. It is necessary to take advantage of human potential by creating strong and solid tourist companies in the Province of Imbabura.

## CONCLUSIONS

The objective of this research was to analyze the tourism offer in the province of Imbabura. The importance of a study of such characteristics stems from the limited theoretical and empirical contributions that have analyzed the tourism market in the province.

When considering tourism offer as an activity in development, it is evident that there is still much to be done, since control institutions at present, both public and private, are becoming more demanding in compliance with legal, accounting, tax, municipal and health obligations.

The results led us to identify: tourist profile and their characteristics, degree of access to financing and insurance, degree of compliance with obligations, degree of marketing activities implementation, technological equipment, training and perception of international tourists.

The majority of tourist business concentrations are found in the urban area. They are considered as a family-type business with a payroll between one and five employees, registered as natural persons, with national investment, and run mostly by men with higher education. A low number of tourism companies work with travel agencies.



The baseline described in this study is related to activities carried out by establishments. Internet accounts handle inappropriate content and their presence on the web is very poor, thus making feedback with customers difficult. It is important to innovate tourism products by improving: customer service, promotion, use of digital media, investment in advertising, among other aspects.

The use of technological and computer equipment and machinery to perform tourist activities is acceptable. Hotel infrastructure presents a remarkable improvement, the work processes implemented meet quality parameters, foreign investment is available in tourism businesses, some establishments present international standards and indicators, recycling has become a regular practice, and finally, certifications for quality and environmental standards are available. However, owners do not use all existing marketing techniques and strategies efficiently; therefore, specialized marketing services should be hired.

To monitor the sector and provide timely indicators for decision-making in both the public and private sectors, it is recommended to manage a comprehensive tourism information system in the province. It is advisable to strengthen the "Imbabura" brand as a tourist destination and develop, promote and improve digital platforms through digital media. The tourism sector must align itself with the Geopark initiative in its focus on education, conservation and geotourism. In short, the information obtained from this study could potentially help promote the sector, facilitating an adequate tourism offer that covers the needs and desires of a national and international demand.

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