

Current situation of tourism in Ecuador: challenges and opportunities

Alex Gavilanes Montoya ^{1,3} , Danny Castillo Vizuete ^{1,2}  ✉, Fernando Esparza Parra ^{1,2} , Renato Chávez Velásquez ^{1,2} , Eduardo Muñoz Jácome ^{1,2} , Flor Quinchuela Pozo ^{1,2}  & Gabriela Román Santamaría ¹ 

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² Faculty of Natural Resources, Escuela Superior Politécnica de Chimborazo, Panamericana Sur km 1½, Riobamba, EC-060155, Ecuador

³ Escuela Superior Politécnica de Chimborazo, Sede Orellana, El Coca EC220001, Ecuador

✉ Correspondence: danny.castillo@esPOCH.edu.ec  + 593 98 771 2497

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Abstract: Before the health crisis, one of the most important sectors for the national economy was tourism, therefore to guarantee the economic development it is necessary to reactivate and boost this sector. The objective of this research was to identify challenges and opportunities for tourism in Ecuador through the analysis of information collected through bibliographic review. A socio-demographic tourist profile was described in periods before and after COVID-19, and changes were identified in terms of travel, interests and needs. The results obtained refer that the health crisis modifies the preferences related to the company, destinations and number of nights, thus, tourists currently prefer to travel as a couple or alone, they choose large places to avoid contagion and spend fewer nights at their destination. Finally, the study concluded that the current situation represents a challenge for the country in terms of the improvement and diversification of tourist attractions, that if carried out and managed properly, it could generate a positive economic impact in a medium or long term.

Keywords: Tourism; challenges; COVID-19; development; sustainability.

1. Introduction

Tourism contributes to economic growth and development due to the generation of employment and monetary flow (economic income from the sale of goods and services) [1,2]. World Tourism Organization reports [3] refer to an exceptional growth in the tourism sector between 2017 and 2018 (7 and 6% respectively), and normal growth in 2019 (4%), a figure that was expected to continue in 2020. However, the COVID-19 pandemic changed drastically this scenario due to border closures, mobility restrictions and confinement. Thus, globally, the number of international tourists in May 2020 was reduced by 98% compared to 2019; between January and May 2020 there was a year-on-year

decrease of 56% in tourist arrival [4]. According to data from Internal Rent Service, in Ecuador between January and March 2020, the tourism sector generated an income of 664 million dollars, 21% less than the value registered in the same period in 2019 [5]. Tourism incomes from January – March 2020 are broken down as follows: accommodation – 13.96% (equivalent to 92.7 million dollars), food service – 64.37% (427.5 million dollars), travel agency and tour operation – 20.34% (135.1 millions), and other booking services – 1.24% (8.8 million dollars) [5]. In terms of employment, until December 2019 there were around 477,382 jobs in activities related to accommodation and food service, 3.03% more than 2018 [6]. Regarding the impact of COVID-19 in this sector, Ecuadorian Ministry of Tourism (MINTUR) estimates that the income from tourism activities for the current year will be reduced by 70% compared to 2019 [7].

Tourism is based on the existence of natural and cultural resources (manifestations – customs, heritage assets, etc.) that generate value through its promotion and commercialization [1]; in this understanding, tourist resources become attractive as long as they are known and can be visited (access and infrastructure conditions) [8]. The geographic location of Ecuador associated to other factors like the presence of Andes mountain range and the marine currents have resulted in a climatic and biological variability (4 regions: Costa, Sierra, Amazon and Galapagos), so a diversity of ecosystems combines with a compact geography and adequate connectivity (road network) contribute to the enjoyment of tourists [9]. At the national level, the tourist offer is heterogeneous, the main categories being: ecotourism or nature tourism (national parks, reserves, water sources, flora and fauna observation), cultural (cultural heritage, markets and crafts, gastronomy, shamanism, popular festivals, archaeological tourism, urban tourism, etc.), and sports or adventure (river, land, air and water activities) [10,11].

Although the biophysical and cultural conditions in the national territory are conducive to the development of tourism, there are adverse factors, such as: inefficient tourism management and administration, a disjointed tourism offer [11] and little control in matters of care and conservation [12]. April (2012) indicates that the appearance of other tourist destinations depends on a structured offer, in other words, a potential destination must have a set of complementary tourist products or places [13]. The diversification of tourism must be based on social and institutional conditions, and on territory planning, so that several options for innovative activities or sites with natural or cultural potential can be considered to generate interest in national and foreign tourists [14].

Since tourism contributes directly or indirectly to the Sustainable Development Goals (SDGs): 8 – promote continued and sustained economic growth, 12 – guarantee sustainable consumption and production patterns, and 14 – sustainably use the oceans and marine resources [15], it is necessary to establish a baseline around the tourist and the activity they carry out. The objective of this article is to analyze the pre and COVID-19 situation of tourism in Ecuador. For this, an extensive bibliographic review of statistical data from official sources, reports, scientific articles and tourist reactivation agenda was carried out. The implemented strategy comprised two phases: 1) information research using keywords, such as: tourism in Ecuador, tourism use, post-COVID tourism, and tourism in figures, and 2) selection of

bibliographic content based on the authors' knowledge and experience. When these phases were completed, the main tourist sociodemographic characteristics were exposed: interests, motivations, destination preferences and satisfaction levels. These elements are necessary to establish the weaknesses and strengths of this economic sector within the current context, and constitute the most relevant input to define strategies within the framework of tourist reactivation and development.

2. Results

The national tourism activity is carried out by two strategic groups: a) national tourists (domestic tourism) and b) foreign tourists (inbound tourism); the first group is linked to the movement of Ecuadorian citizens in the national territory, while the second refers to the entry of foreigners (excluding those whose reason for travel corresponds to other interests). According to the INEC (2019), the main reason for the entry of foreigners during 2018 corresponded to tourism (71.1%), registering 1,928,612 entries to the country out of a total of 2,428,000 [16]. In 2019, this figure decreased relatively, obtaining 1,375,859 tourism entries out of a total of 2,043,993 – equivalent to 67.0% [17]. In January 2020 there were 150,426 arrivals of foreign visitors, -21% compared to January 2019 [18].

There is little information about domestic tourism in Ecuador, despite the fact that it is greater than inbound tourism and therefore its economic impact is considerable [19]. Currently, given the incidence of COVID-19 and mobility restrictions (airport closures), cities like Quito have prioritized domestic tourism within their territory.

Based on statistics and bulletins from official sources, the following data was obtained:

2.1. Sociodemographic profile of the tourist

The statistics for January 2020 indicate that the nationality of foreigners who entered the country for tourism in decreasing order are: United States, Spain, Canada, Germany and France. If the figures for January 2019 are compared with January 2020, a positive variability can be seen for each of the countries of origin, the largest increase being for French tourists (+ 20.7%), followed by Spanish (+ 19.4%), Canadians (+ 17.7%), Americans (+ 11.4%) and Germans (+ 9.1%) – *Figure 1*. Most foreign tourists are 36 years old and males, their average stay corresponds to 8 nights (for tourists from the region this figure decreases) and their average spending is around USD 1,283.70, an amount that is higher for Australian, American and French tourists [20]. Data from MINTUR refer that the characteristics of tourists who entered to Ecuador in 2019 are: gender (males – 53.44% and females – 46.55%) and age (majority groups: from 20 to 29 years – 21.36% and from 30 to 39 years – 19.55%); while in 2020 (until October) the registered statistics are: gender (males – 51.11% and females – 41.49%) and age (majority groups: from 30 to 39 years – 19.88%, from 20 to 29 years – 19.20% and from 40 to 49 years – 18,25%) [21].

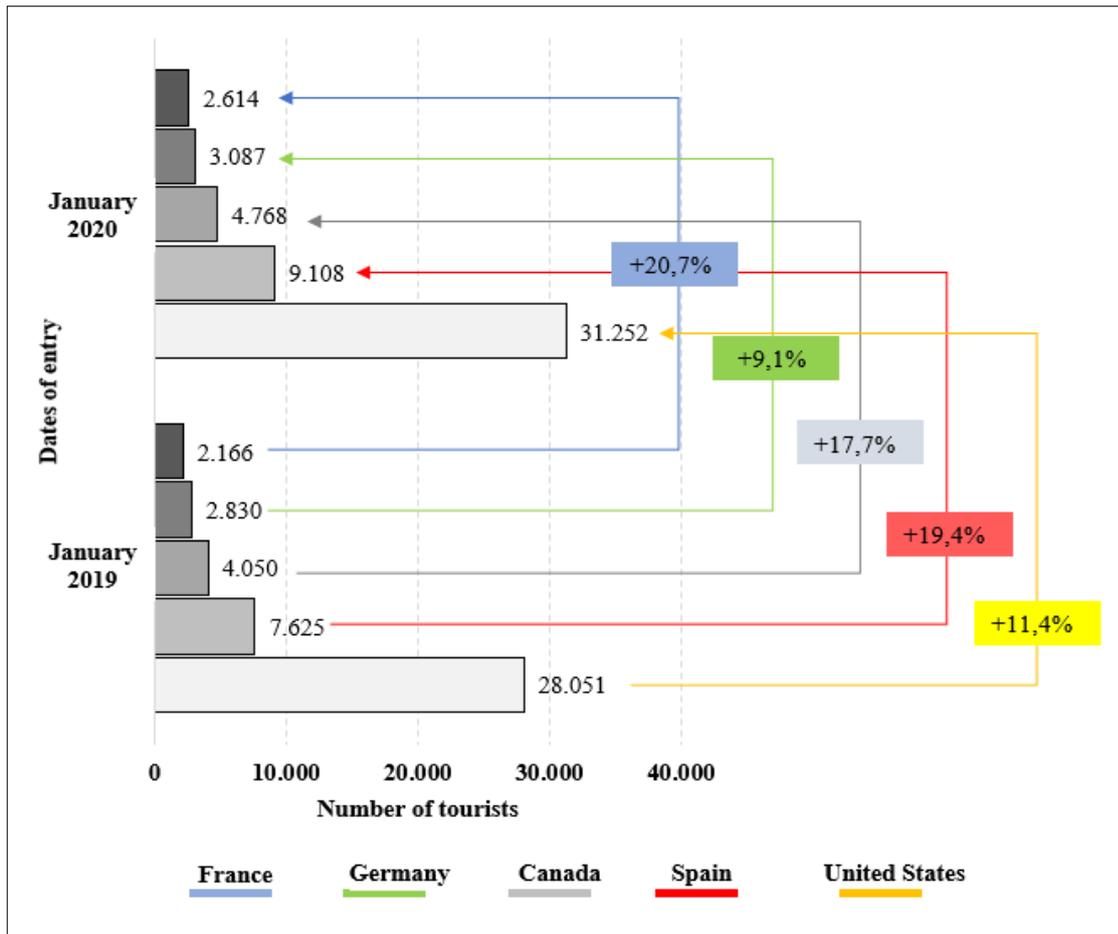


Figure 1. Country of origin of foreign tourists / January 2019-2020 [21].

National statistics indicate that during 2017 and 2018 domestic tourists came from the following cities (descending order): Quito, Guayaquil, Cuenca, Duran, Daule, Rumiñahui, Mejia, Ibarra, Ambato, Latacunga, and others [22]. A national report regarding domestic tourism under the new normal analyzed a sample of 8,329 tourists and obtained the following results for each sociodemographic variable - Table 1 [23].

Table 1. Sociodemographic characteristics of domestic tourists under the new normal [18].

Variable	Groups	Percentage (%)
Age	Young boys	46
	Young adults	21
	Adults	32
	Older adults	1
Occupation	Employee	54.39
	student	40.10
	Unemployed	1.55
	Retired	1.08
	Others	2.88
Marital status	Single	62.30
	Married	25.51
	Divorced	5.32
	Free Union	6.27
	Widower	0.60
Gender	Female	58.25
	Male	41.75

Table 1 shows that the majority groups are: age – young people (46%), occupation – employees (54.39%), marital status – single (62.3%) and gender – women (58.25%). Ecuadorian tourists usually travel twice or three times per year, their travel dates correspond to holidays and their mean of transport is mainly: bus (48.34%) and car (43.49%) [24]. This trend is similar to the diagnosis made in Quito, which reported an increase of 68.21% for domestic tourist in 2020 compared to 2016. Its results were: a) 79.5% corresponds to visitors up to 45 years old, grouped into the following ranges: under 25 years old (26.9%) , from 26 to 35 years old (33.1%) and from 36 to 45 years old (19.5%); b) regarding the marital status of tourists, two statuses or categories can be differentiated: single (single, widowed and divorced) and as a couple (married and common law union), which registered 55.8% and 44.2% respectively; c) the main segment of the economically active population is located in private sector (36.2%); d) the level of education of tourists was: higher (41.8%), secondary (32.7%), technical (17%), primary (4.4%), postgraduate (4%)) and without study (0.1%) [25].

2.2. Travel motivation, type of tourism and how you have learned about this destination

According to the Coordination of Statistics and Research of MINTUR (2019), the main reasons for travel for domestic tourists are: visiting family and friends (47%), recreation and leisure (32%), others (16%) and religion (5%) [20]. While, the motivations of foreign tourists are: vacation and leisure (56.9%), business (17.1%) and visiting family and friends (18%) [24]. Regarding the Metropolitan District of Quito, a survey carried out in 2016 and 2019 suggests that the motivations for travel and types of tourism that coincide in the years of study are: visiting family and friends, gastronomy, urban tourism, tourism of congresses and events, bird watching, community tourism and LGBTI tourism.

Among the sources of information used by domestic tourists, the following stand out: references from friends or family (42.16%), social networks and web pages (27.17%), and television (10.33%) [25]. It is generally identified that word-of-mouth advertising and media are tools for promoting the country's tourist attractions [26]. In contrast, the internet (websites: MINTUR, Trip advisor) is the most important source of information for foreign tourists [24].

2.3. Means that tourists currently use to organize their vacations and leisure

The largest proportion of domestic tourists travels by their own means (86%), therefore, they did not hire an operator or intermediary [25]. Regarding foreign tourists, two spending profiles are distinguished: a) high, who hire an intermediation service and is generally linked to nature tourism, and b) low, which refers to young tourists who generally organize the trip on their own, and choose as destinations: coastal areas, national parks or other destinations in the Highland Region [27].

The tourist cadaster (2018) includes around 24,720 establishments, of which 9% is linked to operation and intermediation activities [24]. Tourism operators and travel agencies generated around 167.9 million dollars from January to March 2019, amount that decreased for same period in 2020 (135.1 million dollars) [5]. Due to the pandemic, projections suggest a decrease in clients in the intermediation sector.

2.4. Main places of visit

The main places of visit (Table 2) for both tourist segments are detailed below:

Table 2. Destinations for inbound and domestic tourist.

<i>Inbound tourist: The visited provinces are [21,24]:</i>	<i>Domestic tourist: The top ten of cities considered like destinations are [22]:</i>
1. Pichincha*	1. Quito
2. Guayas *	2. Guayaquil
3. Santa Elena	3. Cuenca
4. Manabí	4. Ambato
5. Galápagos	5. Rumiñahui
	6. Latacunga
* Pichincha and Guayas have a large influx of foreign tourist due to the location of the airports.	7. Riobamba
	8. Manta
	9. Ibarra
	10. Santo Domingo

Quito, Guayaquil and Cuenca are considered as preferred destinations, because they have a greater tourist offer (accommodation services, food, operators or intermediaries, among others) [20]. In Quito, the main tourist attractions are: the Panecillo, the Middle of the World, the Ronda, the Cable Car, as well as the parks, churches, museums and other sites [25]. In Guayaquil, the most prominent tourist sites are: the boardwalk, the historical park or park of the iguanas, the stairway to Santa Ana hill, the museums, and others [28]. And, in Cuenca, the most visited places by tourists are: museums, churches, archaeological sites (ruins of Pumango and All Saints) and heritage buildings [29].

2.5. Satisfaction of the tourist in the country

The level of tourist satisfaction is related to the following variables: diversity and quality of tourist products, security, price, tourist infrastructure, proximity, advertising, distribution channels and climate [30]. Many studies indicate that the declared satisfaction of tourists in Ecuador is high – Table 3.

Table 3. Satisfaction of the tourist in Ecuador.

Place	Result (Level of satisfaction)	Source
Santay Island - Guayas	8 out of 10 respondents indicated a high degree of satisfaction. The level of satisfaction depends on the image of Santay Island as a natural destination.	[26]
General Villamil beach - Guayas	45.2% of respondents was satisfied, and the 36.4% mentioned that was "very satisfied". The destination has a high satisfaction due To a sun and beach tourism, many tourist attractions and a varied gastronomy.	[31]
Historical Center - Pichincha	76.9% of respondents considered that they were satisfied with the visit, while the 2.1% mentioned that they were moderately satisfied. In this study the satisfaction was related to the characteristics and conservation of Historical Center, as well as associated services (like transport, accommodation, etc.).	[32]
Galápagos Islands	The evaluation realized by the visitors refers that the tourist service in Galapagos Islands is excellent or satisfactory. The analyzed activities were accommodation, food service, access to parks, security, etc.	[33]

2.6. Variation of scenarios: Pre-COVID vs New Normal

When comparing the pre-COVID period vs the new normal, in Table 4, it can be seen that the number of people who will travel alone or with their partner increases, in contrast to trips with friends or family. The average stay at the destination decreases with the new normal (by at least one night). And in relation to tourist destinations, preferences are directed towards wide and open spaces such as: mountains, protected areas and other natural environments (mainly linked to the Amazon and Galapagos). Basically, these changes are due to distancing and prevention measures against the virus, as well as the decrease in economic income during the pandemic.

Table 4. Tourism trends in the scenarios: pre-COVID and the new normal [18].

Variable	Pre COVID (%)	New Normal (%)	
<i>Company on the trip</i>	Friends	19.23	18.47
	Family	59.83	53.26
	Did not travel	4.19	0.6
	Others	0.62	0.58
	Couple	11.33	17.95
	Alone	4.8	8.98
	Does not know	-	0.14
	<i>Number of nights at the destination</i>	None	7.72
At least 1		9.65	39.93
From 2 to 4		54.36	33.33
More than 4		28.26	8.69
<i>Touristic destinations</i>	Costa region	51.69	45.34
	Sierra region	28.33	-
	Amazon region	5.58	8.16
	Galapagos	0.97	4.07
	Foreign	2.75	
	Did not travel	0.9	0.56
	None in specific	3.46	-
	Others	6.32	0.9
	Adventure	-	7.78
	Of Mountain	-	12.01
	Protected areas	-	9.27
	Rural destination	-	5.07
	Urban destination	-	6.84

The identification of needs, tastes and interests (characterization of demand) is the starting point for the design of tourism products [34], as well as the directing of strategies for the promotion, improvement and diversification of attractions. In general, the perception of the environment's capacity to provide cultural services such as recreation is affected by variables such as gender, occupation, and income [35]. The research by Yumisaca et al (2017) suggests that the tendency to enjoy tourist places in the company of couples, family or friends involves the creation of environments that can be used according to their interests. Furthermore, tourist establishments and products that consider variables such as age and academic level can satisfy the needs of each social group [36].

2.7. Challenges and opportunities of the tourism sector in Ecuador

The new normal has led to a readjustment in the preferences of tourists in relation to destinations and their average stay. Social distancing measures and the search for open spaces in order to avoid the virus are a way to promote natural tourism or ecotourism, however, an adequate tourist offer, infrastructure and promotion is required to guarantee enjoyment and satisfaction of national and foreign tourists. On the other hand, the economic recession caused by the stoppage of work activities has caused the average stay and other expenses associated with travel to decrease, causing a significant reduction in income from tourist services.

The sustainable development of the tourism sector is based on the territorial potentialities (resources and tourist attractions), supply, demand, as well as an adequate management model that allows articulating and combining different levels of control, administration and local participation [34]. Regarding management and handling, the National Government of Ecuador seeks to implement two lines of post-COVID action: a) strategic: to identify the facilities that the country has in terms of road and tourist infrastructure, as well as the advantages derived from seasonality and b) tactics: covering promotional activities focusing on the advantage of short distances [37,38]. The UNWTO (2020a) suggests that to mitigate the impact generated by the pandemic and stimulate the growth of tourism, it is necessary to manage and reduce the risk, consequently it is recommended: to have protocols and other biosafety measures, to define responsibilities for the different levels of government, to coordinate the progressive opening of borders, implement protocols for detection of possible infections, and to promote innovation by introducing applications that allow the improvement of transport services, accommodation, etc. [39-40].

3. Conclusion

This research presents a brief analysis of tourism current situation in the country, through the compilation of data referring to two key aspects within tourism management: a) the socio-demographic profile of the tourist and their travel motivations, and b) tourist destinations and its level of satisfaction generated for tourists. The main destinations at national level are Quito and Guayaquil, cities that have many tourist attractions and a large offer (services); currently, other places that are becoming preferred destination are those that allow to develop a natural or rural tourism. The level of satisfaction of tourists is higher, and it depends on the perception about the conditions of the place and the services.

The restrictions derived from the COVID-19 pandemic have meant for the country a series of structural and conceptual changes in the tourism field, since the promotion and sale of products or tourist attractions must be directed under biosecurity standards and framed in two terms: spaciousness and open air.

The new normal implies a challenge for the country in terms of infrastructure, application of biosecurity measures and promotion. The implementation of the three aforementioned aspects requires human, technological and economic resources, management and organization by governing bodies, and cooperation of tourism service providers. In this context, actors of tourism sector should persuade to customer (tourist) to visit multiple destinations through health guarantees (prevent COVID -19 contagion).

On the other hand, geographical, climatic and biological diversity makes it an attractive country for both inbound and domestic tourism, this last became more relevant as a segment

that has made it possible to relatively rescue the national economy during the pandemic. Natural and cultural resources of Ecuador constitute a valuable opportunity to promote different types of tourism and destinations. As a follow-up to this study is recommended, addressing in a different approach the two priority groups within the tourism demand: inbound and domestic tourism; this approach should include and analysis in two moments: new normal vs post-COVID-19, in order to determine if the health emergency generated a long- or medium-term effect in this economic sector.

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Author Reviews:



Alex Gavilanes Montoya, Research Professor at ESPOCH – Sede Orellana. Environmental Engineer, Master in Economics and Agricultural Administration. Ph.D in Forestry at the Transylvania University of Brasov – Romania. National and international lectures. He has written books and scientific articles in high impact journals.



Danny Castillo Vizuet, Research Professor ESPOCH – Faculty of Natural Resources. Ecotourism Engineer, Master in Formulation, Evaluation and Management of Development Projects. Ph.D in Forestry at the Transylvania University of Brasov – Romania. Trainer in local development. Lectures in national and international level. He has published books and scientific articles in high impact journals.



Fernando Esparza Parra, Research Professor ESPOCH – Faculty of Natural Resources. Engineer in Computer Systems, Master in Computer Management. Experience as a Professor at the State University of Bolivar, Chief of Systems of the company Tubasec C.A, Systems Operator in the TVCable Group, Business Intelligence in Setel. Scientific articles published.



Renato Chavez Valásquez, Research Professor ESPOCH – Faculty of Natural Resources. Engineer in Ecotourism, Master in Ecotourism projects. Trainer in planning processes in hotel companies, strategic alliances, customer service techniques, personnel management. Manager of training courses for administrative and operational staff. Books and scientific articles published.



Eduardo Muñoz Jácome, Research Professor at ESPOCH – Faculty of Natural Resources Agricultural Engineer, Master in Business Administration, mention in Projects, Master in Teaching and Educational Research. Doctorate studies in Economics and Administrative Sciences. Studies conducted in USA, Italy, Colombia. Project Director. Consultant of several public and private entities. Books, scientific articles published.



Flor Quinchuela Pozo, Research Professor ESPOCH – Faculty of Natural Resources. Economist. Magister in University Teaching and Educational Research, Magister in Business Management, Projects Mention, Higher Diploma in Projects and Technology Transfer, English Language Proficiency Approval. Consultant in the Evaluation Process FAO. Books and scientific articles published.



Gabriela Román Santamaría, Researcher at ESPOCH – Research Institute (IDI). Ecotourism Engineer. Participation in research and outreach projects. Experience in the collection and systematization of primary and secondary information, database generation, statistical analysis, GIS and project formulation. Lectures in the national field. Published scientific articles.



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