

TRAVEL AGENCIES AND TOUR OPERATORS THAT MARKET PAN-AMAZON ECOTOURISM DESTINATIONS: POSITIONING MAMIRAUÁ AND GATHERING INFORMATION FOR AMANÃ

INTERMEDIÁRIOS TURÍSTICOS QUE COMERCIALIZAM O DESTINO PAN-AMAZÔNIA: INSERÇÃO DE MAMIRAUÁ E SUBSÍDIOS PARA AMANÃ

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KEYWORDS:

Tourism distribution channels;
Amazon;
Uakari Lodge;
Amanã Reserve.

ABSTRACT

Travel agencies and tour operators have a role in mediating the marketing of a tourism destination between supplier and end consumer. Knowing the characteristics of such agencies and operators and how they operate is essential for existing community-based tourism (CBT) destinations and for those under planning. Several national and international travel agencies and tour operators market package tours to Uakari Lodge, which is the only place for accommodation and visitation of the Mamirauá Sustainable Development Reserve - SDR Mamirauá. In turn, the neighboring Amanã Sustainable Development Reserve - SDR Amanã is the subject of a study to analyze the feasibility of implementing a community-based ecotourism project. This study investigates the occurrence of Uakari Lodge in tourism distribution channels websites in order to measure how it ranks in these distribution channels, as well as to identify key competitors to Mamirauá. Also were analyzed hereby, the number of guests to Uakari Lodge between 1998 and 2009 as well as the proportion of visitors who bought package tours through travel agencies and operators in this period, thus allowing to identify the most important commercial partners. The 30 most frequent tour operators were considered key informants and they were sent a questionnaire about Amanã. The results thereof will help update Mamirauá's marketing strategy and plan for tourism in Amanã.

PALAVRAS-CHAVES:

Intermediários turísticos;
Amazônia;
Pousada Uacari;
Reserva Amanã.

RESUMO

As agências e operadoras de viagem têm o papel de intermediar a comercialização de um produto turístico entre o seu fornecedor e o comprador final. Conhecer suas características e funcionamento é tarefa essencial para empreendimentos de turismo de base comunitária (TBC) já em funcionamento e em etapa de planejamento. Diversas agências e operadoras nacionais e internacionais comercializam pacotes de viagem para a Pousada Uacari, único meio de hospedagem e visitação da Reserva de Desenvolvimento Sustentável Mamirauá - RDS Mamirauá. Por sua vez, a vizinha Reserva de Desenvolvimento Sustentável Amanã - RDS Amanã é palco de um estudo que visa analisar a viabilidade de se implantar um produto de ecoturismo de base comunitária. Neste trabalho, foi investigada a ocorrência do produto Pousada Uacari em sites de intermediários, a fim de mensurar o seu posicionamento nestes canais de distribuição, bem como identificar os principais concorrentes de Mamirauá. Também foram analisados os números de visitação da Pousada Uacari entre os anos de 1998 e 2009 e a proporção de visitantes que comprou os pacotes através de agências e operadoras de viagens, sendo possível identificar os parceiros comerciais mais importantes. Os 30 intermediários mais assíduos nas vendas foram considerados informantes-chave e para estes foi enviado um questionário sobre Amanã. Os resultados auxiliarão a atualizar a estratégia de marketing de Mamirauá e a planejar o turismo em Amanã.

INTRODUCTION

Travel agencies and tour operators have a role in mediating the marketing of package tours between their supplier, the tourism destination and the end buyer, the tourist. These agencies and operators can also be called Tourism Distribution Channels (LOHMANN, 2006). According to Beni (2007, p. 213-218), "the tour operators, besides marketing tourism destinations, are also producers of tourist services", while the travel agencies "distribute such services indirectly, acting between supplier and customer."

For Knowles and Grabowski (1999 apud LOHMANN 2006, p. 02), "establishing an effective distribution system is critical to the development and marketing of any successful tourist destination". It is vital for community-based ecotourism projects to know the characteristics and operation of distribution channels dealing with the public seeking to travel to protected areas and to be in contact with local culture. However, "research on tourist distribution channels is recent and fragmented" (LOHMANN, 2006: 10), making it difficult to identify and analyze the context of such distribution channels from the commercial standpoint as well as from the perspective of scientific research.

Gountas and Gilbert (1997) suggest that tourism sustainability depends on the strategies both by the destinations and the operators. According to the authors, tour operators are primarily concerned with their own survival and growth, seeking to meet the needs of their customers and not those of the tourism destinations. However, the performance of alternative (or environment and socially concerned) tour operators leads to

more positive economic, social, cultural and environmental impacts (ibidem). For Irving (2009, p. 109), there was "a subtle change in tourist profile, who are increasingly connected to social and environmental responsibility issues, which began to influence international agencies and operators."

Quaresma and Campos (2006, p. 139) say that "currently, efforts are being exerted towards orienting tourism development through sustainable tourism, mainly through tourism in a local basis." Thus, the reality of community-based ecotourism destinations brings about paradigms other than economic benefits.

Ecotourism must use the natural and cultural heritage in a sustainable way, encouraging conservation and the formation of an environmental awareness and promoting the welfare of populations (BRASIL, 2008). According to Coriolano (2001, p. 103) the participation of civil society will help build a new type of tourism development. With respect to community-based tourism, Irving (2009) argues that the destination's stakeholders should be subject and not object to the process.

Ecotourism often takes place in remote, protected regions (WEARING, NEIL, 2001), whereas CBT is recognized by institutions as a means of generating income and improving the living conditions of communities (LIMA; AYRES; BARTHOLO, 2009). Such context includes the SDR Mamirauá, a protected area where the Mamirauá Institute Community-Based Tourism Program acts for the last 13 years. Next to the Amanã Reserve, Mamirauá and other protected areas make up the Central Amazon Corridor, protecting millions of hectares.

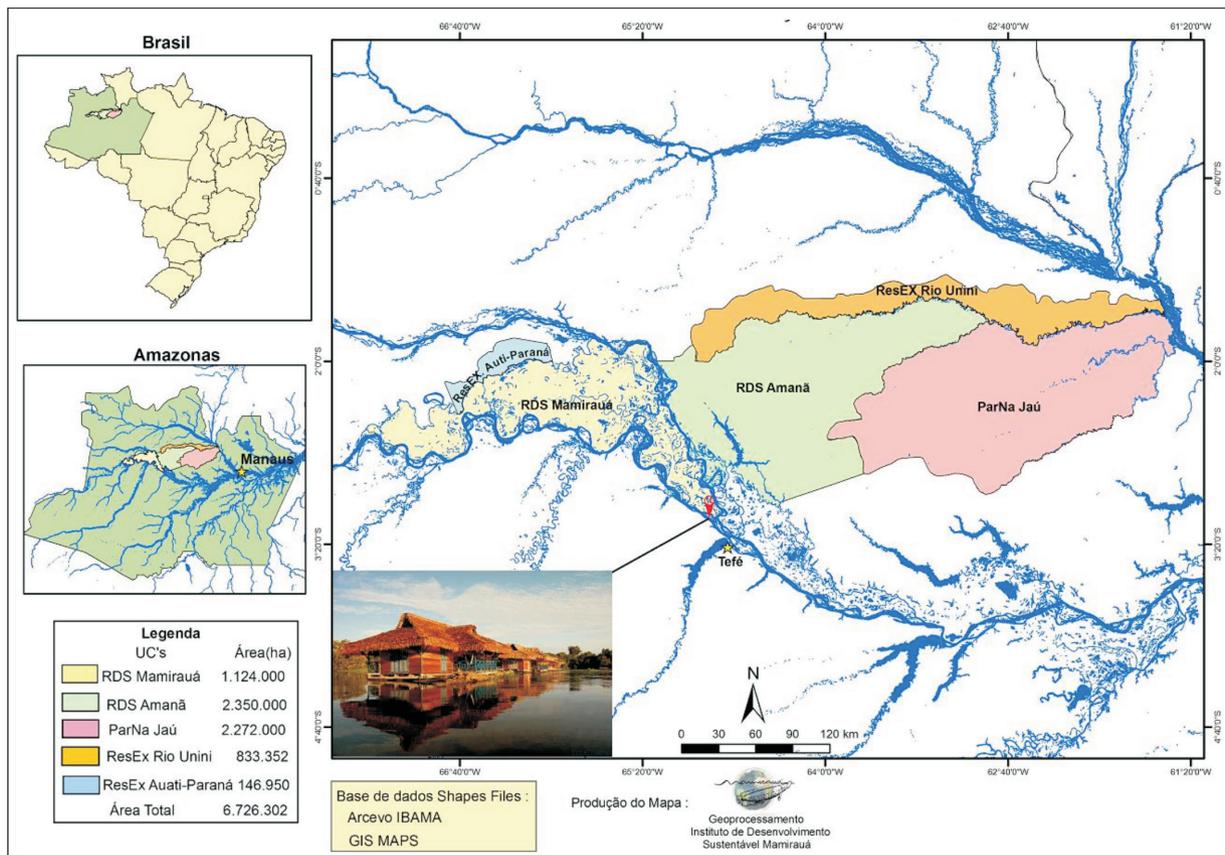


Figure 1 - Area of the Central Corridor, where the Mamirauá and Amanã reserves are located.

Tefé is the gateway for tourists visiting the Uakari Lodge, which is located near the confluence of Solimões and Japurá rivers, on a “várzea” (flooded forest) ecosystem. “Ecotourism has been developed in the SDR Mamirauá as an economic alternative for the populations living in the area, so as to reduce the pressure on the natural resources, to encourage conservation and to improve their quality of life” (PERALTA, 2008, p. 29). Currently, eight communities take an active part in the planning, management and rendering of tourist services.

At SDR Amanã, a tourism planning research has been in place since 2008. It involves nine communities of the Amanã lake, a black water lake on a “terra firme” ecosystem (higher grounds not affected by annual flooding) with many social, environmental and historical characteristics, which are different from those of Mamirauá. The unique elements of the landscape, fauna and flora, and human populations and their historical and contemporary interactions with the environment make Amanã a destination with a potential for developing ecotourism (Ozorio, 2009).

This study analyzes the relationship between the SDR Mamirauá and tourism distribution channels that market Uakari Lodge. It also surveys data to adjust the marketing strategies of Uakari Lodge and to plan for the tourism in the Amanã Reserve.

Material and Methods

The methodology adopted herein was based on the analysis of various data that relate Mamirauá tourism destination to tourism distribution channels that sell packages to the Pan-Amazon region.

Based on surveys of databases of national and international travel agency and tour operators associations such as Abeta, Ustoa, Aito, Braztoa, amongst others, were selected tourism distribution channels that sell ecotourism destinations and community-based tourism, both in the Pan-Amazon and throughout Brazil. Also, a survey was conducted on Google with keywords related to tourism destinations in the Amazon or ecotourism destinations in general such as “ecoturismo + Amazônia” or “South America + ecotourism”. Once such distribution channels were found, a search was conducted on the occurrence of Uakari Lodge in their websites. Overall, 80 domestic and 74 international agencies and/or operators had their websites investigated and the data concerning Pan-Amazon destinations were recorded. Thus, an analysis of the Mamirauá’s occurrence amongst agencies and tour operators was conducted and their main competitors in the Pan-Amazon tourist market were indicated.

In addition to this type of research, the data regarding the number of visitors to Uakari Lodge between 1998 and 2009 were analyzed.

Additionally, it was possible to assess the variation in the proportion of tourists who bought the packages through distribution channels between 2004 and 2009 and to identify them. Based on this information, it was possible to select those selling the most packages to the lodge. These major commercial partners were considered key informants, and were sent a questionnaire to gather information on the potential for tourism development in the Amanã Reserve.

Results and Discussion

The search in the websites of tour operators and travel agencies identified 154 (80 domestic and 74 international) agents who market ecotourism and community-based tourism destinations in the Pan-Amazon. Mamirauá appeared 18 times, or 11.7%, with 11 occurrences among the international distribution channels, or 14.8%, and seven among the national ones, or 8.7%. This is a relatively low figure, especially among domestic tour operators, but, when comparing that figure to Amazon competitors¹ Uakari Lodge has a good position in the market. Were identified 15 destinations in the Amazon that compete with Mamirauá, nine of which being located in the Brazilian Amazon in six in the Hispanic Amazon, between Peru, Ecuador and Bolivia. Figure 2 shows how Mamirauá ranks in relation to these competitors, as based on the frequency of occurrences in the websites that were investigated.

¹ Some of the jungle lodges mentioned as competitors do not fit in as a destination for neither ecotourism nor community-based tourism, but tourism as jungle tourism. However, these are important destinations in the Amazon, with a tourist flow that might be much larger than that of the Mamirauá.

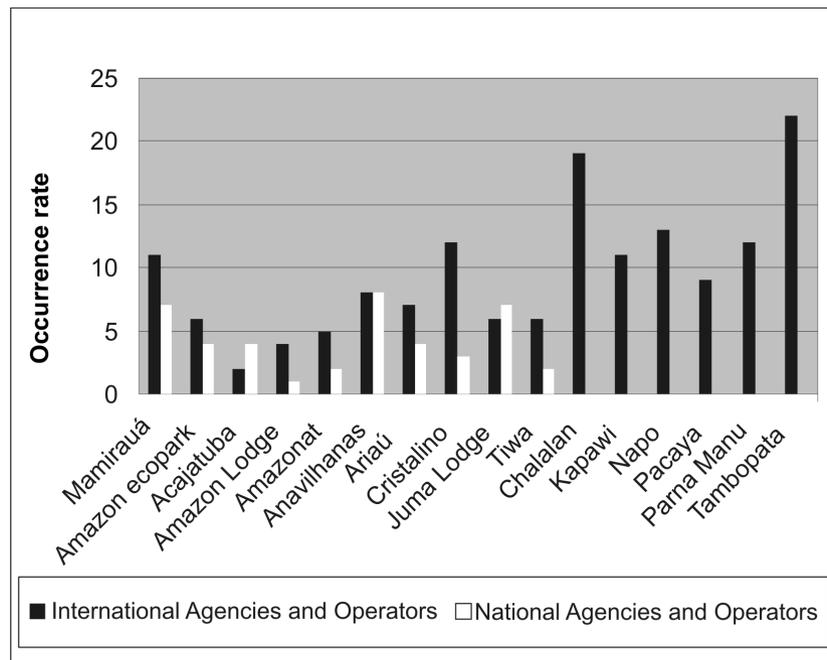


Figure 2 - Destinations in the Amazon featured in specialized travel agencies' websites.

Amongst the domestic and international travel agencies and operators, Mamirauá was the second most common destination in Brazil, ranking in the same position among the domestic agencies (which only offered destinations in the Brazilian Amazon). However, Uakari Lodge was the most referenced Brazilian destination, along with Anavilhanas (18 occurrences), when adding up the occurrences in the websites of domestic and international tour operators. This indicates that among the distribution channels of ecotourism destinations, Mamirauá reserve is well positioned, especially due to the international agencies and operators.

When compared to the international destinations in the Amazon, Mamirauá, with 11 occurrences, ranks next to four of them (with 9 to 13 occurrences), being significantly surpassed by two of them

only, which are mentioned 19 and 23 times. This also demonstrates a good market position against competitors from countries such as Peru and Ecuador, which are seen as major competitors to the Brazilian Amazon (MTUR; MMA, 2010) and have competitive advantages such as being able to reconcile mountain, sea and jungle destinations and more logistics amenities and consequently lower prices. Furthermore, access to the Brazilian Amazon is still expensive, even from major centers in Brazil such as São Paulo and Rio de Janeiro.

The higher occurrence of Mamirauá among the international travel agencies also explains the greater presence of foreign tourists in Uakari Lodge. Figure 3 shows that between 2003 and 2009 foreigners account for an average of 75% of the guests to Uakari Lodge. Between 1999 and 2002 this figure was lower, reaching the highest

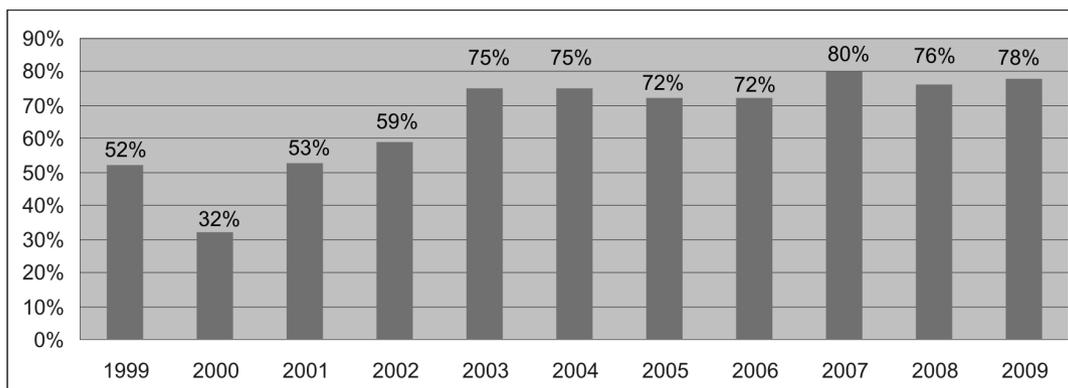


Figure 3: Percentage of foreign visitors to Uakari Lodge.

proportion of Brazilian tourists in 2000, when they accounted for 68% of guests. No data is available for the year 1998. Even with the low percentage of Brazilians, these still account for the highest share per country of guests to the Lodge because of the diversity of foreign guests.

North Americans, British and German tourists are the most frequent guests to Uakari Lodge. Not coincidentally, the USA, Britain and Germany are the three countries identified by the studies of the Ministries of Tourism and Environment (2010) as those with the highest priority for potential tourists to the Brazilian Amazon. In another study by the Brasil. Ministério do Turismo (2010a), tourists from these three countries, along with the French, stand out as the most frequent tourists that landed in the city of Manaus between 2004 and 2008. Among those traveling for leisure, contact with nature and ecotourism accounted for up to 72% of their motivation to travel.

Despite the tourism potential of the Brazilian Amazon being pointed as a few million foreign tourists (BRASIL. MTUR; BRASIL. MMA, 2010),

the reality is still very far from that. Data from the Tourism Ministry (2010b) indicate that 37,135 tourists came to the state of Amazonas in 2009, out of an approximate total amount of 60,000 to the Brazilian Amazon.

Janér and Peralta (2003) also emphasize that the target market set to Mamirauá are the ecotourists seeking for a genuine experience in the Amazon and to discover its fascinating flora and fauna. This is a narrower market than the total number of tourists who just want to see the Amazon.

Figure 4 shows the number of tourists who have visited the Reserve since the first activities of Uakari Lodge, in 1998. The low occupancy rates over the first four years were due to the fact that the project ran in a soft opening mode until 2001, when the construction of 10 lodging units was completed. The Business Plan of Uakari Lodge considered an occupancy rate of 1,000 tourists per year, with an average of three overnight stays, within six years from the construction of the lodge.

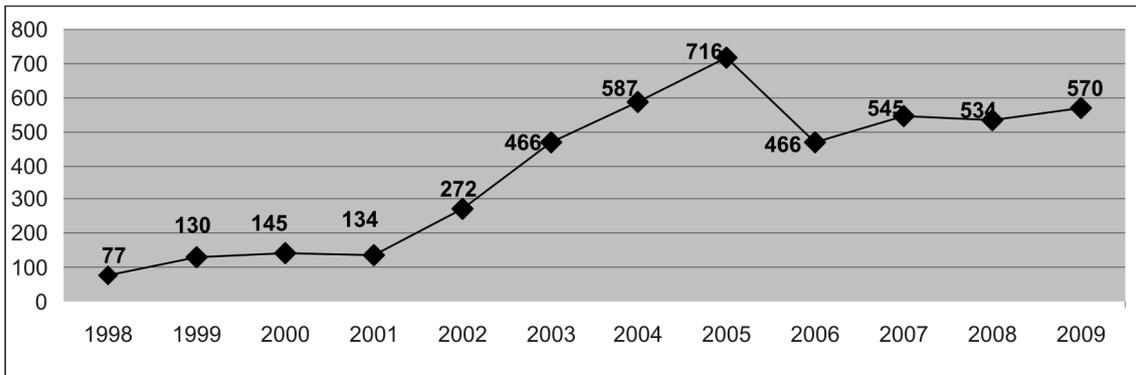


Figure 4 - Number of visitors per year to the Mamirauá Reserve.

Janér and Peralta (2003) point out that, since the construction took longer than expected, the year 2001 should be considered Year 1 for the Business Plan.

Figure 4 shows a strong trend of growth between 2001 and 2005, suggesting that the 1,000-tourist/year target could have been achieved between 2006 and 2007 if that trend had been maintained.

Table 1 - Appreciation of the Real against the Dollar and Euro.

	2005	2009	Variation
R\$ 100.00	US\$ 39.00	US\$ 56.00	+44%
	€ 33.00	€ 41.00	+24%

However, between 2006 and 2007, the airport of Tefé was closed on two occasions (eight months overall) due to safety issues identified by ANAC (the National Civil Aviation Agency). This limited significantly the access to the region and had a considerable impact on the number of visitors

to Uakari Lodge. From May 2007, the airport resumed its regular operations; however, the visitation numbers indicate that the destination is still experiencing a recovery phase. This fact can also be explained by variations in exchange rates.

The year 2005 had a favorable exchange rate to foreign tourism; however, the Real has been gaining strength against the Dollar (mainly) and the Euro, thus causing trips to get more expensive for foreign tourists (that represent approximately 80% of occupancy at Uakari Lodge).

Figure 5 shows the same number of guests as Figure 4 between the years 2004 and 2009, highlighting the proportion of tourists who came to the Reserve through travel agencies and tour operators

It is clear to see the difference in the proportion of visitors getting to Mamirauá through travel agencies and tour operators in 2004 and 2005 and as from 2006. In 2006, the number of tourists dropped by 35% in relation to the previous year

and it was also the year in which the number of tourists using distribution channels was higher than that of tourists who traveled on their own.

After the airport reopened, in May 2007, the number of guests increased again - albeit at lower rates than in the period between 2001 and 2005 - and, in turn, the involvement of agencies and operators in sending tourists increased considerably. In 2008, for example, the number of tourist from agencies accounted for 64% of all guests to Mamirauá. Based on this information, it is possible to say that the destination relied upon the higher participation of tourism distribution channels as a strategy to overcome the setback prompted by the time the airport was closed.

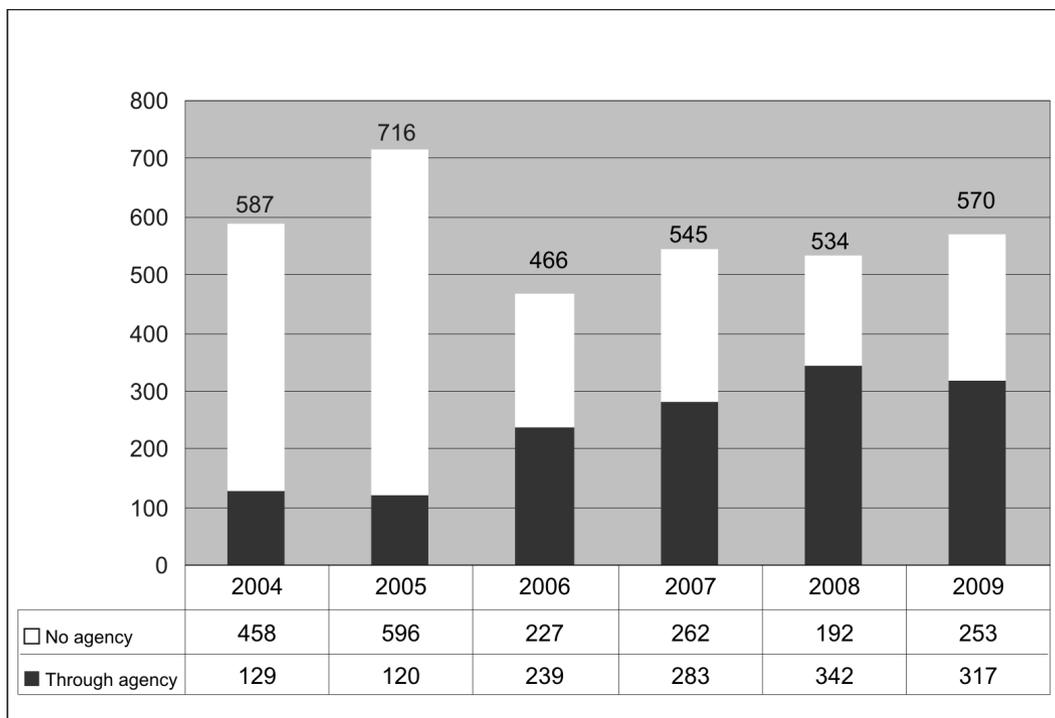


Figure 5 - Amount of tourists who used, or not, tourism distribution channels.

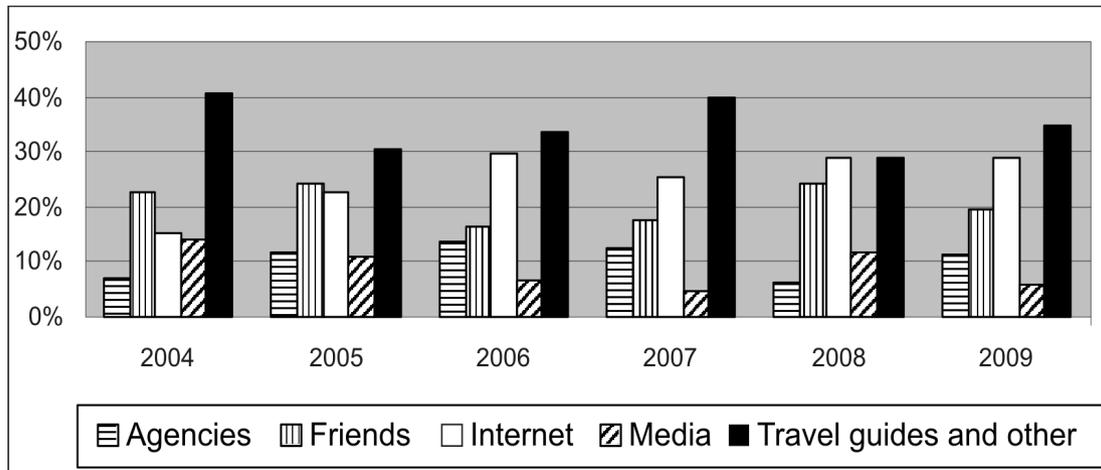


Figure 6: How the tourists heard about Mamirauá.

Although the percentage of tourists from agencies was higher than that for non-agency tourists, Figure 6 shows that a small number of tourists from agencies first knew about Mamirauá through these distribution channels. In 2009, for example, when 56% of visitors came through agencies, only 11% heard about Mamirauá from them.

Therefore, it can be stated that with regard to the efforts to attract customers, the behavior of the distribution channels has been more passive than active. That is, when the customers look for agencies and operators, they already know about Mamirauá. It is important for Uakari Lodge that the reasons for such behavior on the part of the customer be investigated, as it may be related to difficulties in buying tour packages directly from the project driven by failures in communication / passing on information, by the need for a more advanced web-based marketing and sales strategy (such as website improvements) or by other difficulties the customers might come across,

such as buying airline tickets, hotel reservations, obtaining tourist information in the state of Amazonas, amongst others.

The increased participation of distributors was not just due to the increased number of visitors that got to Mamirauá through these agencies, but also by expanding the total number of agencies that came to market the Mamirauá destination. As shown in Figure 7, in 2005, the year with highest attendance and least involvement of distribution channels, only 11 agencies or operators sent tourists to Uakari Lodge. However, as of 2006 the number of agencies has been growing, with a fivefold expansion from 2005 to 2009.

This increase in the number of tourism distribution channels indicates a good positioning of Mamirauá in the ecotourism market, but it has associated challenges. Working with a large number of agencies and operators limits the capabilities of the project to establish closer ties with the agent/operator in a daily basis. Such proximity is of

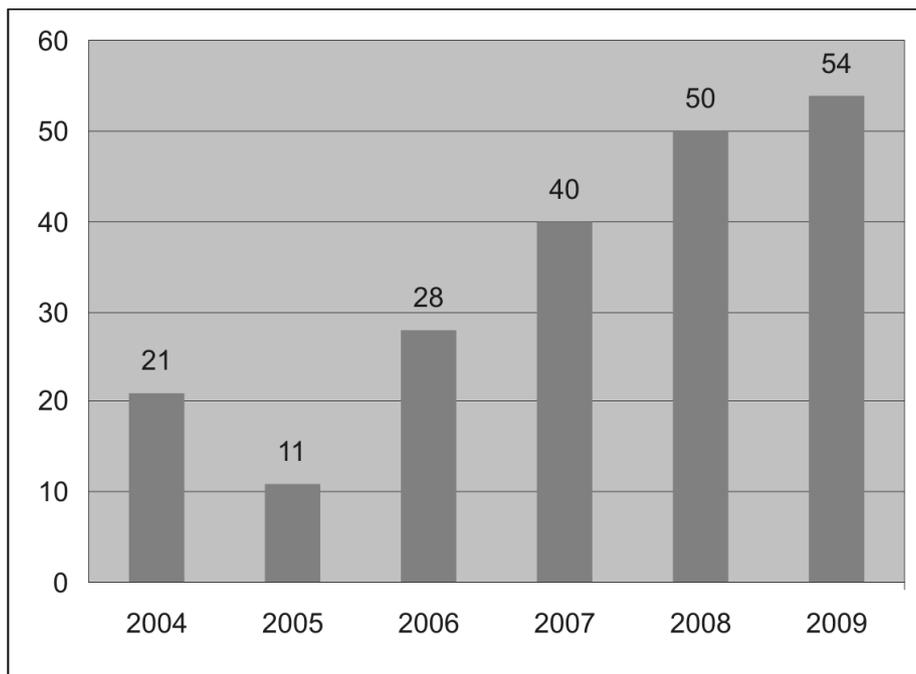


Figure 7 – Number of travel agencies and tour operators marketing Mamirauá.

great importance, for acquiring customers through distributors requires a mutual understanding between the destination and the agent, so that the product (in this case, Uakari Lodge) is sold in the best way possible to an end customer with an appropriate profile for such destination. It is therefore important to monitor the level of visitor satisfaction in order to assess whether the strategy of increasing the number of distribution channels compensates.

Over these six years, 107 different travel agencies and tour operators have sent tourists to Uakari Lodge. By looking into the frequency of each of them over these years and the number of visitors they have provided, it was possible to identify 30 distribution channels that account for 83.5% of

sales by agencies and operators and for sending 35% of the 3,418 tourists who visited Mamirauá between 2004 and 2009.

Those 30 distribution channels were selected as key informants to assist in the research and planning of tourism in the Amanã Reserve. They were sent a questionnaire that focused on their perceptions on the tourism gaps in the Amazon and in Mamirauá and on the highest potential for the development and marketing of the possible Amanã tourism destination. Out of the 30 questionnaires that were forwarded, 11 were answered and provided a diversity of information, which is presented next.

The questionnaire addressed such issues as: gaps in tourism destinations in the Amazon in general and

specifically at Mamirauá; the activities that most interest tourists; type of accommodation suitable for Amanã; and the price range appropriate of a four-night package, amongst others.

Amongst the issues identified as gaps in Amazon destinations, the following were highlighted: the difficulties of access, either by price, inadequacy or amount of time spent, and the low quality of facilities and services provided by the lodges, which are not in keeping with the high prices. The lack of bilingual guides emerged as a problem of Amazon destinations and of Uakari Lodge². Difficult access to Tefé (about 500 km west of Manaus) was emphasized as the main gap for Mamirauá. The lack of publicity material, inflexibility regarding the start date of the tour packages (which, due to logistical challenges, begin on Mondays or Fridays) and the accommodation and food also stand out as items to be enhanced in Mamirauá.

Regarding Amanã, the answers helped identify some important issues. Even though the customers from these agencies are mainly tourists interested in observing wildlife, other activities were also highlighted as being of high importance in the development of tour itineraries for Amanã. The activities highlighted thereof included: animal watching, with 13 occurrences (including fauna in general and birds specifically), but the interaction with communities and their traditional populations, and participating on their traditional and cultural activities, came in second with eight

occurrences. It was said that “in their spare time, the customer is very interested in meeting with the local community” (agent 1), and that “our customers are curious about the life in the Amazon rainforest and want to experience this way of life” (agent 3).

Interacting with local populations was also emphasized when the possibility of accommodation in community houses as an optional item to the packages was suggested. The structure of the possible lodge in Amanã was suggested by most to be built on “terra firme”. Secondly, a floating structure, such as the one in Mamirauá, was suggested. The possibility of using a boat with cabins was not significantly suggested, and overnight camping in the woods also appeared as an option to the package.

Regarding the price of a 4-day/4-night tour package, the options in the questionnaire ranged between R\$ 1,200 and R\$ 2,100. Based on the activities that were highlighted by the agents in the questionnaire, no significant difference was observed from the rates of Uakari Lodge. Considering that the logistical challenges of Amanã are greater than those of Mamirauá, the slightly higher price, as indicated by respondents as marketable, may be appropriate. Some chose lower rate levels, perhaps insufficient to fund the operation, while others suggested higher prices, but which may allow for investments in improving the quality of both infrastructure and services, identified as gaps in Amazon destinations.

² Even the lodge having a naturalist guide, fluent in English, in all its tour packages. That employee is the only one who does not live in the communities in the Mamirauá Reserve.

Finally, most said it was interesting to think of an itinerary coupled with Mamirauá and Amanã, mainly because of the peculiar characteristics of each ecosystem, the first destination being the “várzea” (flooded forest) and the second being a dark water lake on “terra firme”. Those who said this possibility is not feasible justified by stating that the time to be spent in the Amazon, especially by foreign tourists, would be excessive. This demonstrates that the logistics for a coupled tour should be well planned in order to provide an enriching experience for both communities and tourists.

FINAL CONSIDERATIONS

The low occurrence of Mamirauá among the distribution channels specialized in ecotourism and community-based tourism destinations demonstrates that it is necessary to enhance the dissemination strategies for these specialized distribution channels that operate with the tourists with the visitor profile for the Mamirauá Reserve. Although well positioned among competitors, this situation is most relevant among the national travel agencies and tour operators, as evidenced by the majority of foreign tourists to the lodge and by the questionnaires, which indicate poor dissemination as a gap.

The high percentage of tourists coming to Uakari Lodge through agencies and tour operators also demonstrates the need for increased dissemination to the general public seeking ecotourism and CBT destinations, thus also improving this direct

attracting of tourists. The large number of agents who send tourists to Mamirauá demonstrates that the network of contacts is increasing. However, it is necessary to keep everyone up to date, encouraging them to be more proactively in attracting customers, identifying those main ones that may act as partners. An example of that is what occurs with Brazilian destinations, including Mamirauá, and travel agencies members of Rede Turisol, which is the Brazilian Network of Community-based Tourism.

As for Amanã, it was important to receive these replies while planning is still being drafted. Crucial research stages are still to be performed mainly to obtain the views from the community members about the activity and also from the tourists themselves about the potentials of Amanã. But, knowing what the possibilities are, which are pointed out by those who will sell the destination, helps to draft the planning, thus avoiding mistakes.

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