




**Basic diagnosis of whale shark tour operators performance in Isla Holbox,  
Chiquila and Isla Mujeres for the potential  
eco-certification of the activity by Green Globe 21**




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# Objectives

- ◆ Understand the variability on the tour operators performance for potential voluntary eco-certification of the activity by Green Globe 21
  - ◆ To have an information base line as a tool for the design of improvement measures of current and future activities
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# Methodology

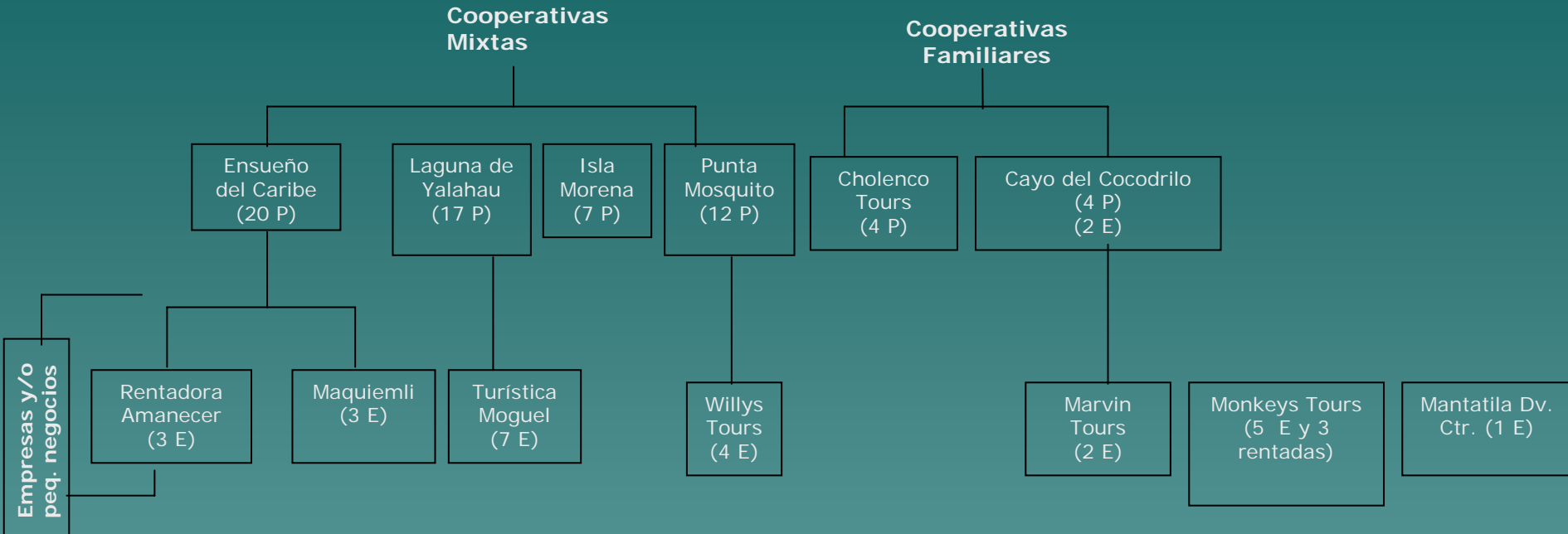
- ◆ Field visits (Isla Holbox, Chiquila and Isla Mujeres)
  - ◆ Surveys to tour operators (boat owners, captains and guides)
  - ◆ Surveys to tourists
  - ◆ Participation in whale shark observation tours
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# Results / Surveys Tour operators

## Types and organizational levels / Work plan for the 2007 season

	Isla Holbox	Chiquilá	Isla Mujeres
Permits	70	13	42
Org.	Mixed Cooperatives Family Cooperatives Small enterprises and empresas	Miramar Cooperative Fraternidad Ambiental Cooperative (family)	Mixed Cooperatives Particulars Empresas
Work plans	78% No 22% Yes	62% No 38% Yes	48% No 52% Yes
Trips in 2006	9 a 200	1 a 15	5 a 180

# Results / Isla Holbox



Cooperative and businesses which offer whale shark tours in Isla Holbox, Quintana Roo

## Results

### Duration, fees, opinion of their trips

	<b>Isla Holbox</b>	<b>Chiquilá</b>	<b>Isla Mujeres</b>
Duration	3 - 7 hours	4 - 6 hours	6 hours
Special trips	35% No 65% Yes	89% No 11% Yes	12% No 88% Yes
Fees	\$800.00 pesos per person	\$800.00 pesos per person	\$70.00 a \$150.00 dollars per person

# Results

## Environmental plans

### Politics

	Isla Holbox	Chiquilá	Isla Mujeres
Internal rules	11% No 89% Yes	100% Yes	6% No 94% Yes
Periodical evaluations	45% No 55% Yes	100% Yes	6% No 94% Yes
Continued training	54% No 46% Yes	Yes	24% No 76% Yes

# Results

## Environmental Plans

### Efficiency in energy consumption

	<b>Isla Holbox</b>	<b>Chiquilá</b>	<b>Isla Mujeres</b>
Fuel consumption	60 - 150 lts per trip	60 - 130 lts per trip	60 - 300 lts per trip
2006 Season	900 lts - 22,000 lts	80 lts - 1,290 lts	500 - 27,000 lts
Daily registry	No	No	83% No 17% Si

# Results

## Comercialization

	<b>Isla Holbox</b>	<b>Chiquilá</b>	<b>Isla Mujeres</b>
Promotion	40% signs, 14% brochures, 82% personal cards, 71% mouth to mouth, 9% Internet, 11% agreements with taxi drivers	Miramar Cooperative, information module, brochures, sign	52% signs, 58% brochures, 70% cards, 41% Internet, 100% mouth to mouth
Client follow up	77% have no data bases of their clients	100% have no data bases of their clients	23% have data bases of their clients
Evaluation by clients	62% asks opinion of clients	38% asks opinion of clients	76% asks opinion of the clients

# Results

## Benefits to local communities and knowledge of laws and regulations

	Isla Holbox	Chiquilá	Isla Mujeres
Local personnel	100% Yes	100% Yes	100% Yes
Number of employees	1 - 22	Miramar Cooperative: 20 Fraternidad Ambiental: 4	1 - 9
General Wildlife Law	65% No	100% No	52% Yes
Whale shark management plan	77% Yes	75% Yes	94% Yes
Permits	100% Yes	100% Yes	100% Yes

# Results / Surveys to captains and guides (non-owners)

	Isla Holbox	Isla Mujeres
Experience	1 - 6 years	2 - 6 years
Trips in 2006	20 - 80	1 - 40
Personal plan for wht 2007 whale shark season	65% No 22% Yes. According to group they work with 13% Yes. Learn languages  (Of 73 guides, only 10% speak english or other languages)	44% Yes. Offer a better service, follow the rules and train prior to the season
Work exclusively for a tour operator or business	73% Yes 27% No	100% Yes
Organization	70% Good. Because they have weekly meetings, their family and work closely together, good coordination and service	78% good. Good service 22% regular
Knowledge and experience	17% excellent, 74% good, 8% regular	89% good, 11% regular
Courses	Given by CONANP and other institutions  Whale shark biology and ecology Aquatic rescue Snorkel for activity First aid Specialized guide for whale shark interaction  Some tour guides look for other courses: languages, bird watching	Given by CONANP and other institutions  Whale shark biology and ecology First aid Rescue and survival in the sea Group management in Natural Protected Areas and Non Protected Areas Libreta de mar

## Results / Opinion of management

	Isla Holbox	Chiquilá	Isla Mujeres
Highest risk	Increase in the number of permits (51%), irregular activities from tour operators of Isla Mujeres and Cancun (30%)	Current excess in permits (75%), irregular activities from tour operators of Cancun (25%)	Too many permits (35%), irregular activities from tour operators of Cancun (29%)
Changes they would make	Constant inspection and surveillance (37%), limit number of permits to current number (31%), one entry point to sell tours (9%)	Have less permits (37%), constant inspection and surveillance (25%), detailed evaluation of all tour operators (12%)	Constant inspection and surveillance (58%), no more permits (17%), more training (18%)

## Results / Opinion of management

	Isla Holbox	Chiquilá	Isla Mujeres
Equitative system for all	42% Yes 58% No	80% Yes 20% No (preference to Holbox tour operators)	47% Yes 53% No. "Bad" competition
Current system protects whale sharks	34% No. Excess of boats and irregular activities	50% No. Lack of inspection and surveillance	58% No. Lack of inspection and surveillance, not enough training
New rules	Less boats when there are few animals, regulate size of boats, charge capacity study to determine number of boats	100% thought rules are clear and need no changes	35% Yes. Limit size of motors to 100 HP, one more passenger for tour guide who comes from travel agency

## Results / Opinion of tourists

	Isla Holbox	Isla Mujeres
Recieved information on whale sharks	60% Yes 40% No. (18% language barrier, the rest just didn't recieve info.)	52% Yes 48% No. Provided by external tour guide
Recieved information on the code of conduct and it was followed	96% Yes 4% No. Very flexible guide (if whale shark is bothered it will let you know)	95% Yes. 5% No. More than two tourists went into the water, or external tour guide went into the water
Recommendations to improve the trips	21% Yes. More information, training in languages, better organization at the docks	43% Yes. Smaller groups
Recommendations for whale shark protection	23% Yes. Limit the number of boats and days when there is interraction with the species, exclusive use of ecological motors	Too many boats for only one whale shark (4 to 5)

## Results / Opinion of tourists

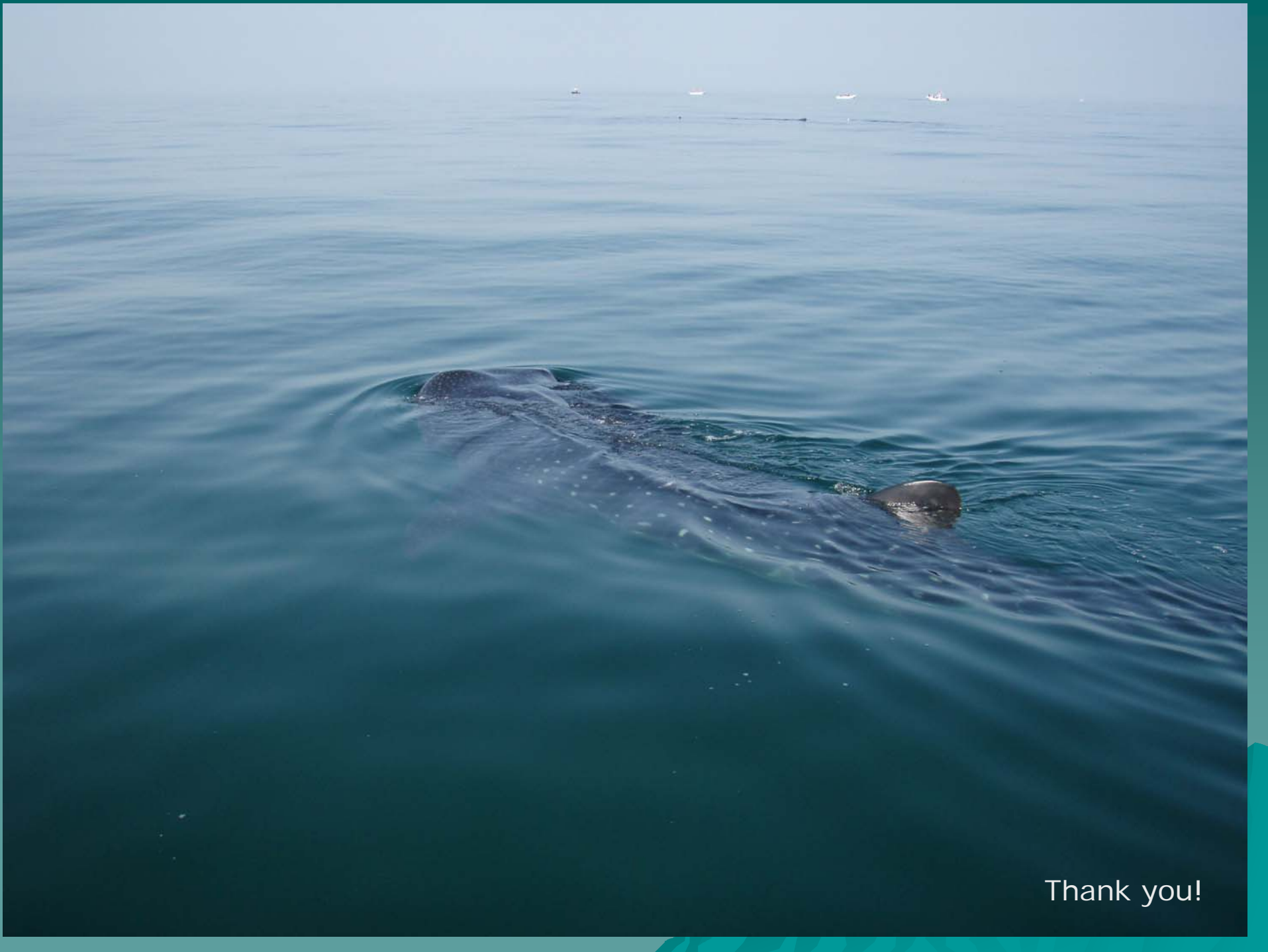
	Isla Holbox	Isla Mujeres
Fee payed	<p>\$500.00 - \$2,000.00 pesos per person</p> <p>Locally: 37% \$800.00, 30% \$700.00, 8% %600.00 (less proportions \$900.00, \$750.00, \$650.00, \$550.00 and \$500.00)</p>	<p>\$90.00 - \$260.00 dollars</p> <p>5% \$90.00, 56% \$200.00 (lesse proportions \$100.00, \$165.00, \$185.00, \$230.00 and \$260.00)</p>
Hired directly the tour operator	<p>54% No 46% Yes</p> <p>84% of tourists who hired through travel agencies or hotels commented they have no knowledge who they went out with</p>	<p>90% No 10% Si</p>

# Conclusions

- ◆ Organization in Holbox in four levels (mixed cooperatives, family cooperatives, small operators and “empresas” who have infrastructure and move more tourists)
- ◆ Evident the effort authorities have made (specially CONANP) to manage the activity and give facilities to tour operators (Eg. Training)
- ◆ Organization in Chiquila divided in two cooperatives
- ◆ Organization in Isla Mujeres can be classified as heterogeneous
- ◆ On the general level (three communities) there is a lack of long term planning
- ◆ In Holbox and Isla Mujeres the Cooperatives have “desintegrated” giving way to new groups
- ◆ Concentration of the activity on those who are better prepared (infrastructure, commercialization channels, not necessarily in training or knowledge of the species)
- ◆ Clear evidence in the three communities of unloyal competition and “intermediarismo”
- ◆ Training has been offered in an equal basis but performance is not homogeneous (need of punctual evaluation of all those involved in the activity)

# Conclusions

- ◆ Lack of inspection and surveillance affects perception and credibility of tour operators in the authorities and questions the viability of the activity in the future
- ◆ Questions about viability of the activity in the future from a commercial and economical standpoint
- ◆ Basic diagnosis gives a general idea of the variability in the whale shark interaction activity
- ◆ Inherent variability of tour operators performance, given the characteristics of the communities
- ◆ The extended application of the Code of Conduct is the main strenght of the activity
- ◆ Any plan for improvement needs to be accompanied by efforts at other levels to solve problems such as: (1) unloyal competition and conflicts amongst tour operators; (2) increment on the number of permits without considering the charge capacity of the ecosystem and/or the species; (3) lack of organization and lack of consolidation in service comercialization processes (which Conduct is the main strenght of the activity)
- ◆ Efforts for certification of the activity could improve tour operators performance and reinforce basic aspects of the operation (continued training, implementation of environmental management systems, cost generates loss of economical revenew to external operators)



Thank you!

# Resultados / Isla Mujeres

Distribución de permisos para la observación y nado con tiburón ballena en Isla Mujeres

Organización	Nombre	Número de permisos	Formalmente constituida
Cooperativa	Isla Mujeres	10	Si
Cooperativa	Isla Bonita	12	Si
Empresa	Rentadora Sol	3	Persona física
	Aqua Adventures	1	Si
	Sea Hawk	1	Persona física
	Caribbean Connection	2	Si
	Boat Adventure Isla Mujeres	3	Si
	Exal	2	Persona física
	Cuchipirry Tours	1	Persona física

**Nota:** cabe destacar que una de las embarcaciones de una de las cooperativas, es utilizada por una de las empresas. Solo se encuestó a uno o dos prestadores de servicios turísticos por cooperativa. Lo anterior con el fin de encuestar a la mayor parte de particulares y empresas (no se logró encuestar a todos los que cuentan con permisos, por ello la discrepancia entre los 42 permisos oficiales y los marcados en la tabla)