

# **Data Collection Survey on Tourism in Western Region of The Republic of Honduras**

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**Japan International Cooperation Agency  
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◆ Abbreviation ◆

AECID	Agencia Española de Cooperación Internacional para el Desarrollo
CANATURH	Cámara Nacional de Turismo de Honduras
CITEAT	Centro Innovación y Tecnología en Artesanía y Turismo
IHAH	Instituto Hondureño de Antropología e Historia
IHT	Instituto Hondureño de Turismo
JICA	Japan International Cooperation Agency
MANCORSARIC	Mancomunidad de Municipios de Copán Ruinas, Santa Rita, Cabañas y San Jerónimo
NGO	Non-Government Organization
OCDIH	Organismo Cristiano de Desarrollo Integral de Honduras
OIDH	Organización Integral para el Desarrollo de Honduras
SETUR	Secretaría de Turismo
SEPLAN	Secretaría de Planificación y Cooperación Externa

# 1. Summary of Data Collection Survey

## 1.1 Objective of Survey

- ① To collect basic data regarding tourism development in western region.
- ② To indicate a future direction of tourism development based on the result of the above activity.
- ③ To propose “ideas” of cooperation by JICA in order to realize a future direction of tourism development.

## 1.2 Summary of Survey

Duration of Survey : From January 8, 2012 to February 16, 2012

Surveyed Area : Western Region (Mostly in Copan Ruins expanded in three (3) Prefectures such as Copan, Ocotepeque and Lempira, )

Survey Procedure : Data collection, interview, site visit, work shop

# 2. Tourism Situation in Honduras

## 2.1 Tourism Situation in Honduras

### 2.1.1 Summary of National Tourism Plan

Sustainable Tourism Development Strategy was prepared by Secretary of Tourism (SETUR) and Honduras Tourism Institute (IHT) in 2005. According to the above strategy, following components for tourism development are proposed.

#### **【Priority (short term) Development Zone】**

- ① Bay Islands : Preparation of international beach resort considering natural environment.
- ② Maya Ruins Area : Preparation of cultural tourism route between Copan Ruin and the North Coast considering protection of ruins.
- ③ The North Coast : Further expansion of beach resort. Development of eco-tourism utilized the rich natural resources.

#### **【Middle Term Development Zone】**

- ① Yojoa Lake Area : Installation of tourist area to offer eco-tourism, recreation, sports, etc.
- ② Comayagua Area : Installation of tourist area using historical buildings/town, and traditional festival.

#### **【Long Term Development Zone】**

- ① La Moskitia (Puerto Lempira Area) : Frontier with northeastern part of Nicaragua. Development of eco-tourism using heritage of ethnic minority and particular environment of savanna.
- ② La Moskitia (Rio Platano Area) : Protection and promotion of tourist use (eco-tourism) of primitive rainforest.

**2.1.2 Major Tourism Resources**

Major tourist destination and tourism resources in Honduras are classified in three (3) categories as follow; Caribbean islands and beach, pristine nature such as rainforest and Maya Ruins.

Table 2.1 Major Tourism Resources in Honduras

Resources	Description
Nature resources	<ul style="list-style-type: none"> <li>● <b>Natural Park and Protected Area</b> : Biodiversity and particular landscape in rain forest in Moskitia and Celaque National Park are provided.</li> <li>● <b>Fauna and Flora:</b> Various eco-system such as mountains, swamps and lakes are expanded and also diversified nature is provided.</li> </ul>
Historical resources	<ul style="list-style-type: none"> <li>● <b>Ruins and Landmark</b> : Maya Ruins is major tourism resources in Honduras and expanded in western region. Comayagua, Santa Rosa de Copán are known well for colonial town and historical buildings. <b>Heritage</b> : Unique customs kept by indigenous people in Maya Chortí, Lenca, etc. are attractive for tourist.</li> <li>● <b>Museum</b> : History and ethnic museums are placed mainly in Tegucigalpa.</li> <li>● <b>Annual Festival</b> : Various festivals such as Easter in Comayagua and carnival in La Ceiba are celebrated in different area.</li> </ul>
Resorts	<ul style="list-style-type: none"> <li>● <b>Beach</b> : Caribbean islands and coasts such as Tela are known for coral reef, white sand, clear ocean and preferred place for diving.</li> </ul>
Outdoor activities	<ul style="list-style-type: none"> <li>● Various activities such as river rafting, hiking, bird watching, jungle tour, horse riding are offered.</li> </ul>
Handicrafts	<ul style="list-style-type: none"> <li>● Various handicrafts such as pottery, wood carving, textile, jewelry are provided. Also agro tourism such as coffee field tour is offered.</li> </ul>

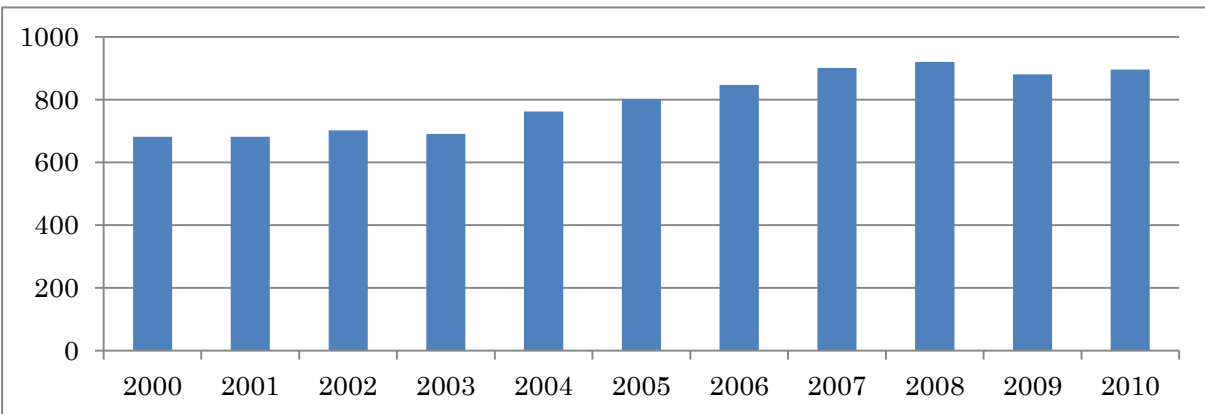
Source: Survey Team

**2.1.3 Number of Tourist and Tourism Situation**

**(1) Situation of Number of Visitors**

Number of annual visitors to Honduras has been increased from 2000 (about 680,000 visitors) to 2008 (920,000 visitors) continuously. It was slightly decreased in 2009 due to instability of political situation and global economic fluctuation. Meanwhile, it was increased again in 2010 and keeps about 900,000 visitors annually.

Figure 2.1 Annual Tourist Arrivals from 2000 to 2010 (in thousands)



Source: Boletín de Estadísticas Turísticas 2005-2009 (SETUR)

**(2) International Competitiveness of National Tourism Honduras**

According Tourism Competitiveness Report, Honduras is ranked in 88th of 139 countries (2011). Comparing among Central America, Costa Rica is the head of the list as 44th, and Honduras is ranked in fourth place of six (6) countries.

Table2.2 International competitiveness of national tourism

	Honduras	Costa Rica	Panama	Guatemala	El Salvador	Nicaragua
2011 (139 countries)	88 <sup>th</sup>	44	56	86	96	100

Source : The Travel & Tourism Competitiveness Report 2011, 2011 World Economic Forum

**2.1.4 Challenges of Tourism**

Challenges of Tourism in Honduras are studied by SETUR and IHT as follow. They are summarized in; 1) coordination and capacity building of organizations, 2) improvement of safety and security, 3) human resources development and 4) development of tourism products and marketing.

**【Challenges of Tourism in Honduras (by SETUR web site)】**

- ① To promote active participation of private sector and local government in program and project development of competitive products including promotion and effective commercialization of priority tourist destination.
- ② To harmonize judicial and institutional framework to improve tourism sector and also to guarantee judicial security.
- ③ To establish planning, control and follow up mechanism in order to determine strategic action courses to maximize sector benefits and also to evaluate the result of tourism policy.
- ④ To promote institutional coordination through formation of tourism cabinet to define sectorial and inter-sectorial policies that give consistency to the public action on tourism issue.
- ⑤ To improve security and service in tourist destination through formation of tourism police and development of facility and information services and tourist support.
- ⑥ To develop programs for capacity building of human resources in tourism sector and also for guarantee a quality of services and actions aiming at improvement of tourism culture diffusion.
- ⑦ To support local/regional tourism development considering value of attraction.
- ⑧ To improve investment in the sector through establishment of promotion fund for tourism.
- ⑨ To develop alternative tourism products considering nature, adventure and rural tourism.
- ⑩ To develop strategic marketing plan to maximize efforts of all related industrial actors, resources and capacity.

## 2.2 Tourism Situation in Western Region

### 2.2.1 Number of Tourist and Tourism Situation

#### (1) Number of Annual Visitors to Copan Ruins

Copan Ruins received around 150,000 visitors annually from 2003 to 2008. Then number was decreased until 100,000 in 2009 and 2010. Half of visitors are from Honduras, followed by Europe and North America. It shows that history and culture of Maya Ruins are attractive for foreigners.

Table 2.3 Number of Tourist by Country

	2002	2003	2004	2005	2006	2007	2008	2009	2010
Honduras	71,935	71,978	79,232	75,272	-	70,013	64,461	41,757	52,231
Guatemala	9,304	10,421	11,487	10,773	-	7,405	7,007	5,060	3,711
El Salvador	5,243	6,623	8,422	8,884	-	10,432	8,205	4,719	4,435
Other Central America Countries	1,167	1,207	1,644	1,109	-	1,380	1,340	1,067	821
South America Countries	2,539	2,871	3,316	3,437	-	4,175	4,300	3,056	3,035
North America Countries	16,354	17,522	18,269	20,209	-	24,280	25,619	19,685	17,354
European Countries	26,283	30,884	33,495	28,037	-	29,584	31,150	22,380	20,564
Others	2,715	2,539	3,765	4,751	-	3,223	3,953	2,523	2,622
Total	135,540	144,045	159,630	152,472	171,591	150,492	146,035	100,247	104,773

Source : IHAH

#### 2.2.2 Major Tourism Resources

Major tourism resources in western region are Maya Ruins, three (3) national parks, local industry such as coffee and heritage of indigenous.

Table 2.4 Major Tourism Resources in Western Region

Resources	Description
Nature resources	Celaque National Park, Cerro Azul Copan National Park, Montecristo El Trifinio National Park
Historical resources	Maya Ruins: Copan, El Puente, Rio Amarillo Colonial Town: Santa Rosa de Copán, Gracias, Copan Ruins Heritage: Maya Chortí, Lenca
Local Industry	Cigar, Coffee, Stock farm
Cultural Facility	Copan Ruins Site Museum, El Puente Visitor Center, Copan Ruins Children's Museum
Festival and Event	Feria de Copan Ruinas, Religious Processions in Santa Rosa de Copán
Tourism Facility	Bard park, Butterfly Garden, Spa, Picnic Ground etc.
Handicrafts	Pottery, Jewelry, Stone Carving, Textile, Corn Doll, Dyeing etc.

Source: Survey Team



### 2.2.3 Activities for Tourism Development

Following activities are implemented by each tourism organizations in western region.

Table 2.5 Tourism Activities of each institution in the Western Region

Organization	Description
SETUR	<ul style="list-style-type: none"> <li>● Maya tourism route envisions connecting Mexico, Belize, Guatemala, Honduras</li> </ul>
SEPLAN	<ul style="list-style-type: none"> <li>● Improving services for small and medium-sized hotels</li> <li>● Natural and archaeological park management improvement and tourism product development</li> <li>● Training Program for Tourism Industry</li> </ul>
CANATURH	<ul style="list-style-type: none"> <li>● Implementation of Urban Management Project (2008~2013)</li> </ul>
MANCORSARIC	<ul style="list-style-type: none"> <li>● PROTOUR (Cross-Border tourism route in three countries about Maya Culture, Honduras, Guatemala, and El Salvador)</li> </ul>
Copan Ruins	<ul style="list-style-type: none"> <li>● City Beautification</li> </ul>
COLOSUCA	<ul style="list-style-type: none"> <li>● Lenca Tourist Route Development</li> <li>● Historical architecture renovation in Gracias</li> <li>● COLUSUCA Circuit Project (2003-2009)</li> <li>● Training Program for Cooking and Guiding</li> </ul>
CITEAT	<ul style="list-style-type: none"> <li>● Handicraft improvement project</li> </ul>
AECID	<ul style="list-style-type: none"> <li>● Project for visitor service improvement in Copan Ruins (2012~)</li> </ul>
OCDIH	<ul style="list-style-type: none"> <li>● Open-air market of vegetables every Sunday in Copan Ruins</li> <li>● Craft fair in the main square two to three times a year</li> </ul>

Source: Survey Team

### 2.2.4 Challenges of Tourism Development in Western Region

Challenges of tourism development in western region, especially in Copan Ruins, a center of attraction, are as follow based on the result of interview, field survey and workshop.

- ① Redevelopment of downtown in Copan Ruins as tourist destination
- ② Improvement of touristic attraction of Copan Ruins
- ③ Increasing of income and expansion of employment through tourism
- ④ Development of tourism products and events to promote visitors' stay
- ⑤ Improvement of coordination among tourism organization
- ⑥ Improvement and enlightenment of local residence for environment and esthetic consciousness

Table 2.6 Strength and weakness of Copan Ruins tourism indicated at workshop

Strength	Weakness
International presence of Maya Ruins	Vulnerability of infrastructure
Hospitality (spirit of good service, good personality)	Difficulties of accessing (road pavement of main road)
Safety	Disordered of the town (traffic, some townscape)
Ample tourist facilities (accommodation, restaurant)	Poor coordination among organizations
	Low moral standard (waste dumping)
	Poor tourism infrastructure (public restroom, information center)

## 2.3 Situation of Tourism Organizations in Western Region

Following organizations work for tourism promotion in western region, especially in Copan Ruins.

Table 2.7 Situation of Tourism Organizations (Copan Ruins)

Organization	Mission/ Activity
Copan Ruins Management Office	<ul style="list-style-type: none"> <li>● Management of Copan Ruins</li> <li>● Survey and investigation of ruins</li> </ul>
Copan Ruins City	<ul style="list-style-type: none"> <li>● Preparation of tourism strategy and plan</li> <li>● Development of tourist destination</li> <li>● Coordination</li> </ul>
Tourism Association of Copan Ruins (Chamber of Commerce)	<ul style="list-style-type: none"> <li>● Providing tourism information services</li> <li>● Preparation of tourism statistic</li> <li>● Information provision to members</li> <li>● Promotion</li> </ul>
CITEAT	<ul style="list-style-type: none"> <li>● Development and improvement of souvenir and handicraft</li> <li>● Implementation of job training on tourist business</li> </ul>
MANCORSARIC	<ul style="list-style-type: none"> <li>● Support for regional tourism beyond the cities</li> </ul>
NGO	<ul style="list-style-type: none"> <li>● Copan Association : Management of infantile museum, implementation of educative program</li> <li>● OCDIH : Support for community development and handicraft development in the community</li> <li>● OIDH : Investigation of history and ruins</li> </ul>
Private Association	<ul style="list-style-type: none"> <li>● Hotel Association : Promotion of friendship among members, information exchange, coordination</li> <li>● Guide Association : Promotion of friendship among members, information exchange, coordination</li> <li>● Language School : Teaching Spanish</li> </ul>
Private Firms	<ul style="list-style-type: none"> <li>● Providing tourist business through Hotel (35 places)、 Restaurant (25 places)、 Tour operator (7 places) 、 Souvenir shops</li> </ul>

Source: Survey Team

## 3. Consideration Points for Tourism Development in Western Region

Basic direction for tourism development in western region is proposed as follow based on the result of survey described above in Chapter 1 and 2.

### **【Improvement of touristic attraction and function in Copan Ruins】**

- Copan Ruins, including Maya Ruins, is major tourism resources in Honduras. It is placed as priority tourism development zone in “Sustainable Tourism Development Strategy (2005)”.
- Only reference destination has historical and cultural character in three (3) priority tourism development zone. In this connection, tourism development to exploit this particular character shall be important factor to improve diversity and attractiveness of national tourism.
- It is required to improve touristic attraction and function in order to call visitors to go to other tourist destination in the region.

### **【Establishment of regional tourism route】**

- El Puente Ruins and Rio Amarillo Ruins are located along the highway from Copan Ruins to San Pedro Sula. Also colonial town such as Santa Rosa de Copán and Gracias is located to the east from La Entrada on the way.
- Regional tourism route shall be established beginning at Copan Ruins as visit or staying point and also contribute to tourism development in whole western region.

### **【Allocation of touristic benefits to the community】**

- Allocation of tourist benefits to the community through handicraft development and job training has been implemented but not sustained in Copan Ruins. It is required to expand tourist benefits to the community sustaining the reference activities.

### **【Sells promotion of local industry】**

- Pottery, clay work, jewelry, stone carving, dyeing, textile, corn doll as artifacts and coffee as agricultural products are specialty of the region.
- It is required to promote sales of these products and to increase income of local residents.

### **【Coordination and capacity building of organizations for tourism development】**

- Lack of communication among tourism organizations was pointed out at workshop. In this connection, it is required to establish meeting opportunity and consultation among city, NGO, agricultural, artifact and tourist business operator, guide, transport and education sectors.

### **【Promotion of job training on tourism industry】**

- Promotion of employment is one of the important aims of tourism development. In this connection, it is required to improve program contents of job training, such as cooking and service.

### **【Further development and promotion of tourism products】**

- Various one-day tours are offered at Copan Ruins already. It is required to promote such tourism products through further development of unique tour and events.

### **【Improvement of exhibition and guide content of Maya Ruins】**

- Copan, El Puente, and Rio Amarillo placed along the river from Copan Ruins and La Entrada as Maya Ruins has various issues such as deterioration of visitor centers. In this connection, it is required to improve a situation and touristic attractiveness.

## 4 Project Ideas

### 4.1 Possibility of Cooperation by JICA

Concrete project ideas are proposed as follow based on consideration above mentioned.

#### Possibility of Cooperation 1 : Improvement of Touristic Area in Copan Ruins

- Downtown of Copan Ruins is visited as a base place of tours. Meanwhile, chaotic traffic, bumpy road, unfriendly sidewalk around Central Park is issues to be resolved. In this connection, it is proposed to improve tourist area of downtown in Copan Ruins, especially around Central Park to where many visitors come.

##### 【Possible Cooperation Activities】

- ◆ Enlightenment for esthetic consciousness, planning and implementation of traffic system (traffic regulation and control, promenade, planning for parking place), planning and implementation of landscape improvement (rehabilitation of cobbled pavement, landscape control, installation of public restroom), waste management, installation and management support of tourism information center

#### Possibility of Cooperation 2 : Establishment and Promotion of Regional Tourism Route in Western Region

- Western region has basis resources to establish unique tourism route. In this connection, it is examined to support establishment and promotion of tourism route such as Maya Route and Colonial Town Route coordinating with Lenca Route already existed.

##### 【Possible Cooperation Activities】

- ◆ Establishment and management of consultation of regional tourism, preparation of planning by consultation, promotion and publicity of routes, preparation of promotion tool (brochure, map, etc.), preparation of signing (including common logo), planning and implementation of tour ideas (common coupon, etc.), development of tourism products and event

#### Possibility of Cooperation 3 : Development of Local Industry Promotion Center

- Production and sales of artifacts (souvenir) is effective measure to allocate touristic benefits to the region. In this connection, it is expected to continue development of artifacts previously implemented.

##### 【Possible Cooperation Activities】

- ◆ Establishment of organization (consultation) , preparation of work plan and selection of priority project by consultation, development and training of concrete products, marketing, development of sales channel and sales

#### Possibility of Cooperation 4 : Promotion of Job Training on Tourism Industry

- Tourism is important industry to provide employment in western region. In this connection, it is examined to establish job training courses of such as cooking in order to provide human resources to tourism industry.

##### 【Possible Cooperation Activities】

- ◆ Formation of organization, demand survey, study for contents and schedule of courses, preparation of action plan, providing of instructors, implementation of courses

#### Possibility of Cooperation 5 : Development of Software to promote Tourism in Copan Ruins

- Local tour operators offer and implement various tourism products. Meanwhile, it is still possible to develop other products and events. In this connection, it is required to develop tourism software to call more visitors.

##### 【Possible Cooperation Activities】

- ◆ Coordination and capacity building of organizations, planning, selection and implementation of priority project (marketing, promotion, tourism products development, events development, study and preparation of advertising media), improvement of tourism information center

#### Possibility of Cooperation 6 : Improvement of Exhibition and Guide Contents in Maya Ruins

- As mentioned above, Copan Ruins, El Puente, Rio Amarillo need to improve exhibition facility. In this connection, it is proposed to support for exhibition improvement aiming at tourism promotion of the ruins.

##### 【Possible Cooperation Activities】

- ◆ Copan Ruins : Support for exhibition of excavated materials (exhibition of relatively small materials)
- ◆ El Puente : Updating of exhibition
- ◆ Rio Amarillo : Support for new exhibition (building already constructed)

## 4.2 Project Ideas

### 4.2.1 Individual Project

#### Project Idea 1: Project for Improvement of Touristic Area in Copan Ruins

##### 【Outline of Cooperation】

- ◆ Formation of tourism promotion consultation composed of Copan Ruins City and relevant players and establishment of working group (WG) by themes in the consultation.
- ◆ Preparation of plan and implementation of pilot project.

##### 【Involved Organizations】

- ◆ SETUR and/or CANATURH, Copan Ruins City, Copan Ruins Management Office, Copan Ruins Tourism Association, Copan Association (NGO), Hotel Association, Guide Association, Representative of tour operators and artisans, etc.

#### Project Idea 2: Project for Improvement of Exhibition and Guide Contents in Maya Ruins

##### 【Outline of Cooperation】

- ◆ Improvement of exhibition and tourist information service in following three (3) ruins as tourist destination.
  - Copan Ruins : Construction of exhibition pavilion
  - El Puente : Updating of exhibition
  - Rio Amarillo : Support for new exhibition (building already constructed)

##### 【Involved Organizations】

- ◆ IHAH

## 4.2.2 Complex or Comprehensive Project

### Project Idea 3: Project for Tourism Promotion in Copan Ruins

#### 【Outline of Cooperation】

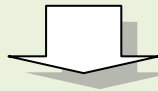
- ◆ Comprehensive support for improvement of attractiveness as tourist destination, promotion of visitors, contribution to local economy and employment aiming at positive impact of tourism.

#### 【Components】

- ① Whole contents of Possibility of Cooperation 1 and 5 above mentioned
- ② Large Part of content regarding marketing, products development and expansion of sales route proposed at Possibility of Cooperation 3 above mentioned

#### 【Involved Organizations】

- ◆ SETUR and/or CANATURH, Copan Ruins Municipality, Ruins Management Office, Tourism Association, Copan Association (NGO), Hotel Association, Guide Association, Representative of tour operators, craft artists, farmers, and souvenir shops



~To develop the above contents as comprehensive project through adding more elements~

- ◆ ”Construction of Complex Facility with Local Industry Promotion Center and Tourism Information Center (described bellows)” and “Construction of Copan Ruins exhibition room” shall contribute to establish a core of local industry promotion and also to improve attractiveness and number of visitors.

### Project Idea 4: Project for Establishment and Promotion of Maya Ruins Tourism Route (Corridor)

#### 【Outline of Cooperation. 】

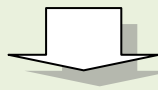
- ◆ Improvement of route using promotion and exhibition contents in Maya Ruins as described at Possibility of Cooperation 2.

#### 【Components】

- ① Improvement of Maya Route described at Possibility of Cooperation 2 above mentioned
- ② Improvement of exhibition and guide contents in Maya Ruins described at Possibility of Cooperation 6 above mentioned

#### 【Involved Organizations】

- ◆ SETUR, CANATURH, IHAH, Rerated municipalities, Rerated Tourism Association, Road management offices, etc.



~To develop the above contents as comprehensive project through adding more elements~

- ◆ ”Construction of Complex Facility with Local Industry Promotion Center and Tourism Information Center (described bellows)” to improve attractiveness of the route and to promote local industry shall contribute to expand benefits in tourist destination.

## Project Idea 5: Project for Development of Complex Facility with Local Industry Promotion Center and Tourism Information Center

### 【Outline of Cooperation】

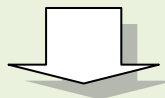
- ◆ Development of complex facility aiming at promotion of local industry, improvement of tourist Information service and receiving more visitors.

### 【Components】

Combination among Possibility of Cooperation 3 and 5 above mentioned

### 【Involved Organizations】

- ◆ Copan Ruins Municipality, MANCORSARIC(Cities Federation), Tourism Association, Representatives of craft artists and farmers, Ruins management office, Hotel Association, Guide Association, Representatives of tour operators, Road management offices, etc.



~To develop the above contents as comprehensive project through adding more elements~

- ◆ Installation of restaurant to the center and implementation of cooking and service training courses shall contribute to practice components of Possibility of Cooperation 4.