



Survey Conducted by Pitta Environmental Consulting. Looking for more insight into Ecotourism markets.

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Eco-tourist (Birdwatching and Bird Photography) Destination Survey Results

Conducted - June to August 2020

Report Released - October 2020

Keith Barnes, Ken Behrens, and Charley Hesse

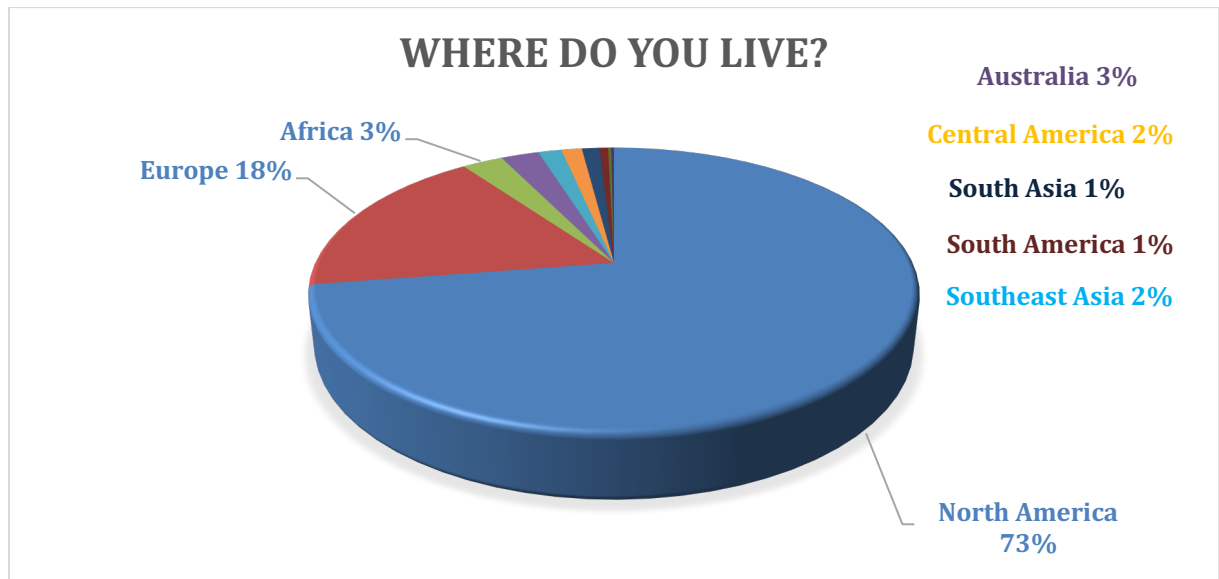
Between June and August (during the peak of the COVID-19 pandemic) we ran an online survey to determine how and where eco-tourists travel. The survey was mostly publicized through social media, and primarily reached groups that identified themselves as birdwatchers and bird photographers (86.6%) vs general naturalist (13.3%); and this bias was evident in the responses. And although the survey did reach some pure photographers, it disproportionately reached photographers who are also birders.

We also posed some timely questions about ecotourists' attitudes towards COVID-19, and its effects on their travel plans.

This survey in the midst of a pandemic provides a fascinating snapshot of the decisions and attitudes of the birding ecotourism market. We received 538 responses to the survey, and the results suggest several clear trends, some of which are discussed below.

Many thanks to all who participated. We hope you have all weathered this pandemic well, and for those of you that enjoy travel, have something planned for 2021.

Where do you live?

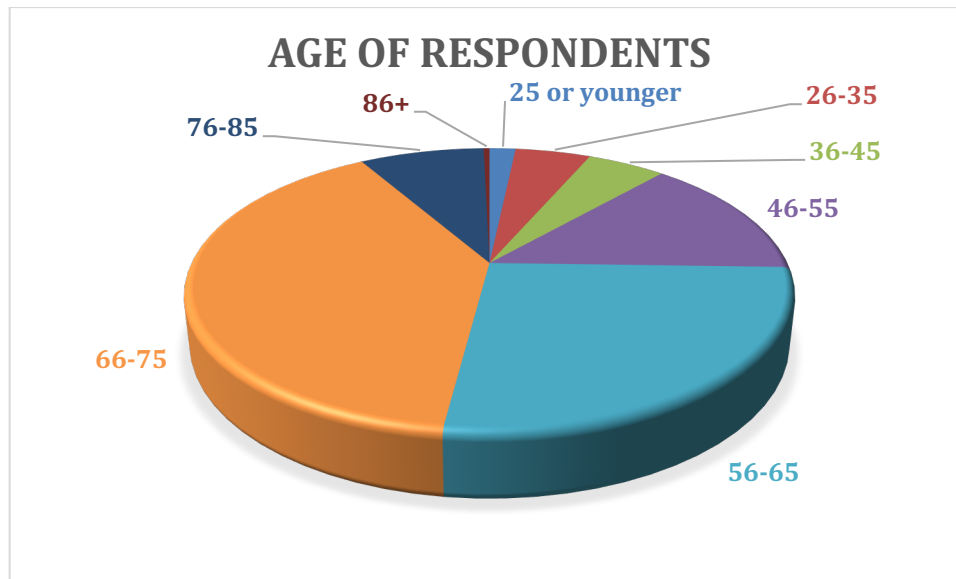


There was a heavy bias towards respondents from North America and Europe. Most other regions, including Central America, Southeast Asia, East Asia, South Asia, South America, and the Middle East, had fewer than 2% of respondents.

As the survey was conducted in English and popularized primarily through channels that reflected a northern hemisphere bias, this may have resulted in additional participation from these regions. However, the demographic above quite accurately reflects the number of 'western' international tourists that participate in birding and photography trips worldwide, and these results can still be accurately interpreted given the underlying survey demographics.

Both the Far East and South Asia have segments of the market that were not well targeted in this survey, especially the pure photographers mentioned in the introduction. Rerunning this survey targeting different language or user groups would be helpful in understanding the attitudes held there, and to create different snapshots for different parts of the world. But we do think that this survey accurately reflects the attitudes of North American and European markets.

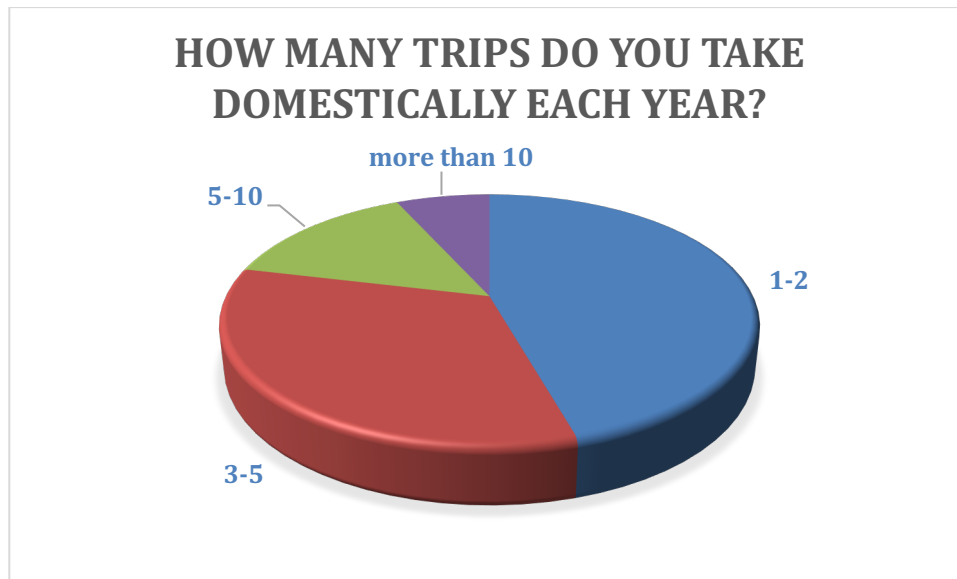
Age of Respondents and How They Travel



The vast majority of respondents were in the age groups 46-75 (over 80%), with much smaller numbers younger or older. This demographic very accurately reflects the portion of the population that has both the resources and time to engage in travel (especially international travel), specifically for the purposes of nature observation. Most people younger than this are either building careers or families and those older than this may find some of the activities are overly exertive or adventurous. The fact that these core age groups were attracted to the survey probably is a good indicator that they are also the core demographic travelling for the purposes of nature observation.

Respondents were also asked if they travel: (1) on their own; (2) with local guides and local tour companies; and (3) with international tour companies. All three categories received more than 50% positive response, suggesting that respondents are flexible and willing to use a variety of ways to travel, often choosing companies in areas with tricky logistics, difficult-to-find wildlife, or added value vs travelling alone.

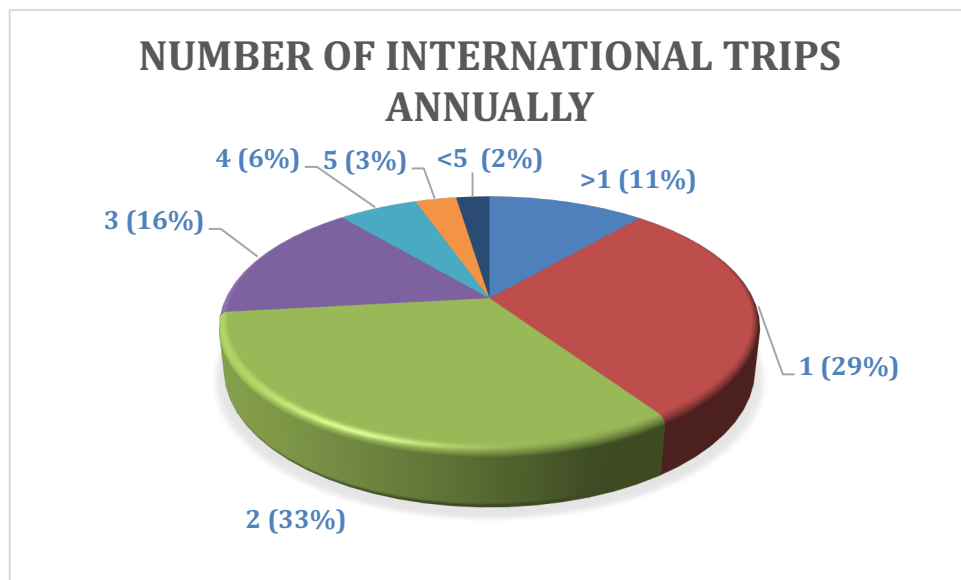
Number of Domestic Trips per Year



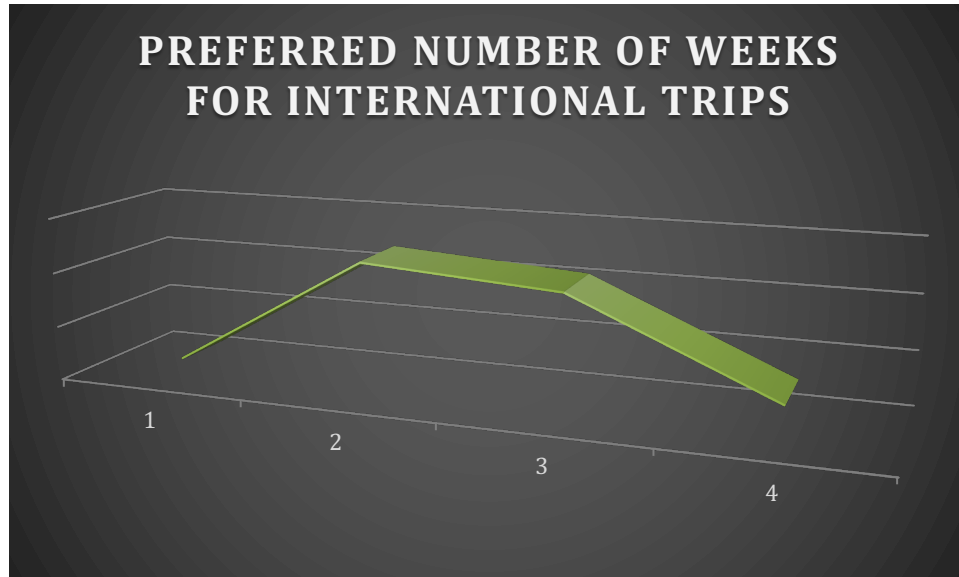
Survey respondents tended to be fairly regular domestic travelers with almost all of them making at least one domestic trip with overnight stays each year for the specific purpose of nature observation. More than half the respondents made more than three such trips with nearly 20% making five or more, placing them firmly in the avid category of people taking a trip roughly every couple of months specifically to go wildlife-watching.

Number of International Trips per Year

Survey respondents were also avid international travelers for the purpose of wildlife observation and seemed to prioritize international travel over domestic travel. Only 11% traveled internationally less than once a year and of those that did travel, most preferred to enjoy two or three trips each year, and 11% were able to take four or more trips each year. It is mildly surprising that participants travel domestically only slightly more frequently than internationally. But this makes sense when you consider that many of these respondents have already travelled extensively within their own country, and are seeking novelty in new, international destinations. The respondents therefore were committed international travelers that had both the resources and desire to visit international destinations multiple times each year. Understanding the means and motivations of respondents helps interpret the responses to the remainder of the survey questions.



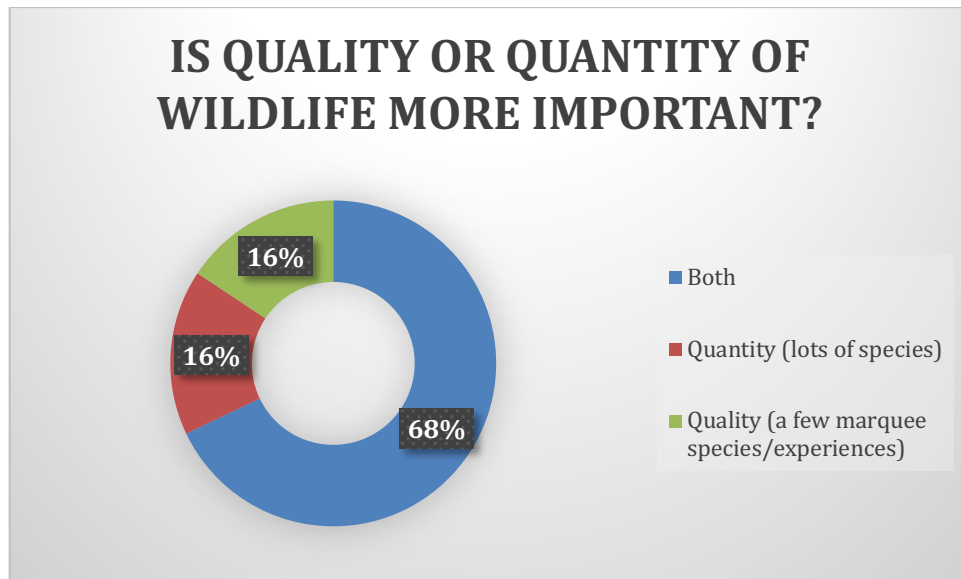
Trip Length



Most respondents preferred to travel for between 8-21 days, with 14 days being the median sweet spot that suited most people. Fewer than 10% preferred short trips of less than a week, and over 10% preferred trips lasting 22 days or longer. With international travel, this makes sense from several perspectives. For trips farther away from home, the cost of the air ticket is a significant expense, and therefore the desire is to get the most of this expenditure. Travel time and jetlag were also factors making respondents want to spend more time away on a trip to justify the exhaustion of the travel. So longer trips were more appealing for destinations that were farther away from home. Being able to explore without the sense of feeling rushed was another motivation for longer trips. Other factors that influenced trip length were if the destination was cheap enough to make it more affordable, or if it offered unique and spectacular wildlife viewing that required a longer stay, then a longer trip would be considered.

Respondents with work and family commitments could mostly not commit to more than 14 days away from home as a maximum. Retired people unsurprisingly reported greater flexibility in the length of trip, and the desire to stay away for longer periods and do back-to-back trips spending as much as 6-8 weeks away from home, though many of them cited travel fatigue as another consideration for the maximum amount of time they could spend away from home, especially once they were older than 75 years of age.

Quality versus Quantity in Choosing Trips



Many wildlife travelers, especially birders enjoy seeing as many species as possible and so the goal of their trips is often to maximize the diversity of habitats and therefore species encountered. These people also often chose specific trips with endemic or specialty wildlife that cannot be found elsewhere on Earth such as lemurs and chameleons in Madagascar, or the 250+ endemic birds in the Philippines. Simultaneously, amazing spectacles such as the wildebeest migrations in Kenya and Tanzania or spending time with habituated apes in Uganda were major drawcards unrelated to the overall diversity of species seen on a trip. Respondents seemed to pretty much value these as equally appealing when choosing a destination, without any bias other than they preferred trips that ticked both the quality and quantity boxes simultaneously.

Importance of Food

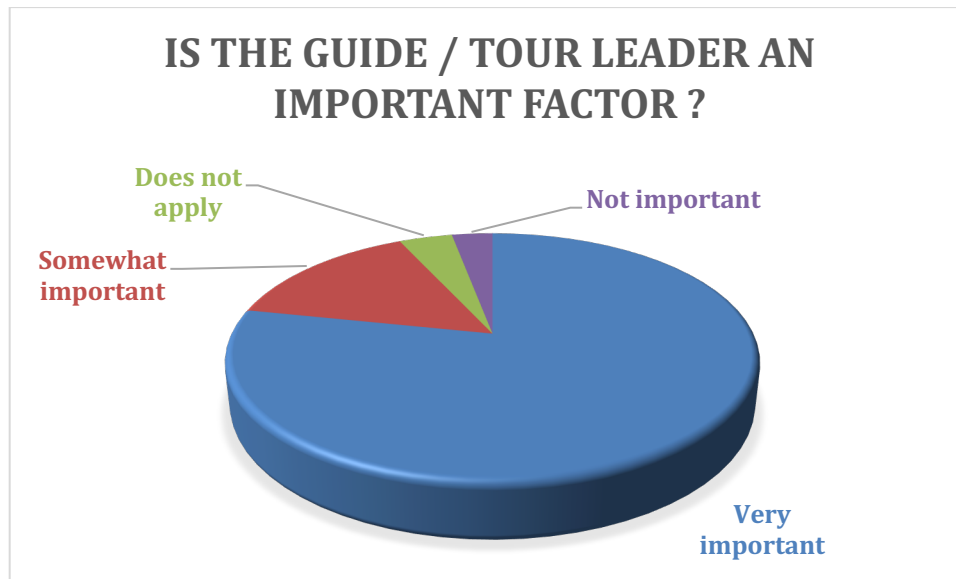
Around 17% of respondents said that the quality and tastiness of food was not a factor, 60% said it was somewhat important and 23% said it was very important. So food and cultures with interesting and tasty cuisine remain a useful incentive to create alluring travel experiences even for dedicated nature-based travelers.

The food did seem much more important than visiting cultural antiquities sites, such as temples or engaging in an activity with a local community. These ranked quite low and most participants preferred to be searching for or photographing wildlife with their trip time. Unless of course the antiquity was a major global icon such as the Taj Mahal, or Angkor Wat, then there was a desire to see these structures, but most preferred a brief 2-3 hour visit rather than a long in-depth exploration.

Quality versus Value in Choosing Trips

There was a strong bias towards respondents choosing quality (34%) over value (6%) in isolation as a driving factor when choosing a trip, however the vast majority selected both together (60%) as a factor. It does seem clear that the finest possible natural history and travel experiences are worth paying extra for and therefore price point is less of an issue. Respondents are not looking for bargains if it compromises the overall quality of their experiences, and in particular are likely to be seeking small group size as a way of improving the 'quality' of their experience. Mass-market tourism is avoided by this demographic, and more sustainable travel to areas with unique natural resources preferred.

Importance of Guide or Tour Leader

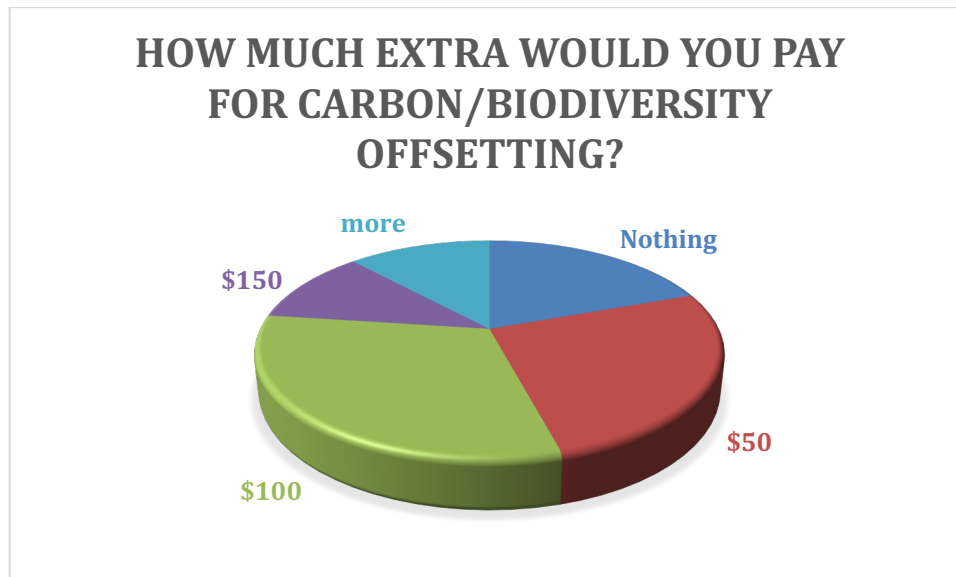


The overwhelming majority (over 78%) of respondents felt that the guide or tour leader that they were likely to travel with was a very important factor in deciding if they would do the trip. Clearly, the good leadership, knowledge of wildlife, and communication skills of professional guides remain a key ingredient to having a successful nature-based operation, and indeed satisfying the general 'nature-based' traveler. So, whether you are a hotel, small tour operator, or engaged in the ecotourism industry in any way, probably the single most important thing to achieve is training guides to the highest possible standards.

Good training for guides comes in several different and equally important modules: (1) understanding and interpreting wildlife; (2) client communication and interaction facilitation; (3) ethics, etiquette, personal attitude and service delivery; (4) leadership, planning, logistics and safety; (5) team-building and collaboration with colleagues; (6) promotion and marketing. There are many different facets that can lead to low satisfaction with guiding, and because most nature-based travelers tend to spend an intensive amount of time (normally 12-16 hours a day) in the company of their guides/tour leaders, that often becomes the single most important decision of their trip.

Good training is not easy to find, but at Pitta Consulting we have hundreds of years of collective experience in the field, so if you need a guide training program, don't hesitate to ask us more about what we offer on that front.

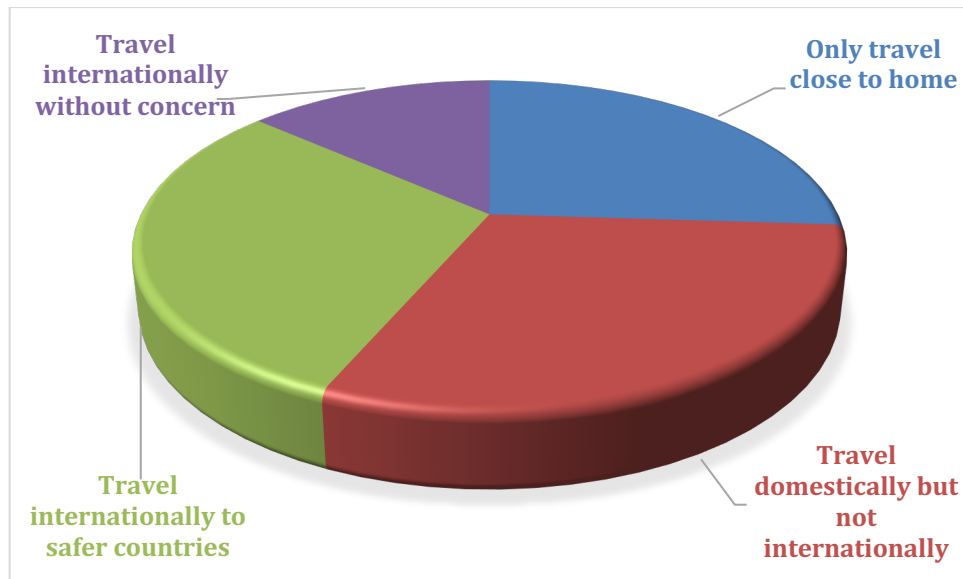
Carbon or Biodiversity Offset



This was perhaps the most surprising result of the survey. It seems most respondents were reluctant to spend much money on ensuring that their travel was carbon or biodiversity neutral or positive. However, reading through the additional commentary gave a fuller understanding of respondents' attitudes. Many felt that many carbon offsetting schemes were fraudulent, and that NGOs and corporations that claimed they were doing valuable things with the money were simply not to be trusted. Respondents also felt that their presence as sustainable ecotourists in high biodiversity areas was a proxy for biodiversity offsetting, as without them deciding to spend their money in these biodiversity hotspots they might already be a lot worse off.

Clearly, there needs to be more transparency from NGOs or corporation that want to convince consumers that their offset programs are both valuable and trustworthy, and that any contributions that are made do end up supporting nature in the intended ways. This hesitancy to trust offset schemes may be the single most important finding of this study. And the net positive biodiversity impact of low-density nature tourism also needs to be quantified and accounted as a positive contribution to those participants, rather than simply being ignored as a non-contribution, which is what happens at the moment. Undoubtedly, sustainable ecotourism dollars have preserved high-biodiversity zones in key megadiversity countries like Madagascar. And yet there is no quantification of the net positive impact each sustainable ecotourist makes, and certainly little value attributed to that individual for making choices that have a net positive impact on biodiversity protection.

In light of COVID-19, Where Will Respondents Travel in the Near Future?

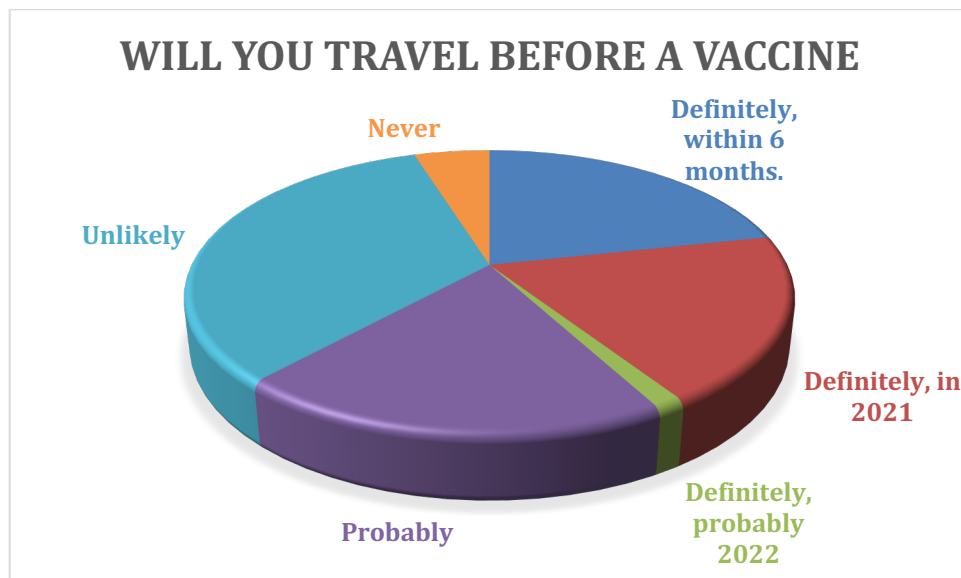


Although many respondents were concerned about healthcare if they were to become infected with COVID, most were keen to keep travelling in one form or another, both domestically and to countries they deemed as having good health care. Many regarded government restrictions to international travel as the primary concern moving forward. Many are ready to travel as soon as restrictions are lifted, though most were looking to Nov-Dec 2020 or 2021 to make concrete plans.

Another interesting perspective was that over 96% of participants said they would travel more frequently, or as frequently, as prior to the pandemic, once there was an effective vaccine or treatment for COVID. Only 4% said they would travel less often. Many said the pandemic had changed their perspective on travel and 46.6% said they would find and make travel more meaningful once the pandemic was over versus 25% that said that the pandemic had not changed their views.

Airplane Travel Before a COVID-19 Vaccine

This was one of the more interesting questions with perhaps the most complex answers. It's important to remember that the survey was conducted in the midst of the pandemic, and long before there was much positive news about potential vaccine candidates or improved treatments. The survey was probably conducted during the 'scariest' time with highest transmission rates in the countries with the key respondents (USA and Europe). Despite that, fewer than 5% said that they would never travel before a vaccine was available. Just under 33% of respondents said it was unlikely that they would travel before a vaccine, but 62% said they would probably or definitely travel again before a vaccine. This fits with the information coming from travel companies like Tropical Birding (www.tropicalbirding.com/birding-reimagined) that are already running tours again, primarily domestically in the USA, but are also receiving bookings for international trips for 2021 despite the known factors. Partially this renewed enthusiasm may be as a result of improved hygiene and stricter protocols at airports and on flights, or because of the development of strategic guidelines by organizations such as the Adventure Travel Trade Association in collaboration with the Cleveland Clinic that have specifically focused on wildlife-watching and created guidelines that make sense and are safer than many mandated activities.



Conclusions

Birdwatchers and photographers are an interesting subset of the sustainable ecotourism market. They are quite different from other ecotourists. Often, they are pioneers, visiting countries long before there is infrastructure and logistical capabilities to host standard ecotourists. Due to their desire to experience exotic and unique wildlife in the most far-flung of the world's destinations, they are amongst the most widely travelled and experienced of ecotourists. Many countries have had much of their ecotourism infrastructure first supported and developed to cater for birders. Our survey has shown that this remains the case, with many respondents being avid global travelers enjoying multiple international trips each year, preferably 2-3 weeks in length. Quality of the trip is more important than value, and they place massive importance on the quality of the guiding of the trip by professional leaders, who essentially determine whether a trip is a success or not. Most do not trust the carbon/biodiversity offsetting programs run by NGOs and corporates and want more transparency in where this money goes before they are prepared to contribute. Their reactions to the pandemic suggest that most are not willing to give up their hobby long-term and expect to resume travelling in 2021, whether there is a vaccine or not. Many are likely to begin with domestic travel, before heading to countries perceived to be safer. It's likely that birders will be amongst the first ecotourists to 'get back on their bikes' and head into the field as international ecotourists. They have long been pioneers in adventure and nature travel and its likely that they will be among the first to begin travelling again post-pandemic.

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If you would like to communicate with us about the results of this survey, please get in touch:

ken.behrens@pittaconsulting.com

keith.barnes@pittaconsulting.com