



Linking Communities
WETLANDS & MIGRATORY BIRDS

Linking Communities Marketing and Eco-tourism Recommendations Report

Executive Summary



Prepared for *Linking Communities* and BirdLife
International

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EXECUTIVE SUMMARY

"*Linking Communities*" works to connect people living along the shorebird migration Flyway and to conserve the associated birds throughout their range, using science, education and eco-tourism. The recommendations proposed within the context of this document are on creating alternative livelihood opportunities, additional awareness and giving birds direct economic value through eco-tourism activities.

Initial discussions held in June 2010 facilitated by Jonathan Stacey, Manager of the Rio Tinto BirdLife International Partnership sought to engage ETC-Africa in developing a plan of action for implementing eco-tourism activities through the "*Linking Communities*" project.

Subsequent desktop research as well as site visits and workshops were held in Canada, the USA and Mexico in August 2010. This document outlines subsequent recommended actions and interventions for *Linking Communities* to facilitate and strengthen eco-tourism activities and marketing at project sites.

The positive link between eco-tourism and conservation has been well documented and forms the rationale for *Linking Communities*' involvement in eco-tourism. Research undertaken at various levels has proven the positive conservation benefits from providing socio-economic benefits to communities through eco tourism. Conclusions from the report "Impacts of birdwatching on human and avian communities" (Sekercioglu C, 2002) highlight this:

"Birdwatching is a most promising branch of eco-tourism because birdwatchers comprise a large and increasing pool of educated and wealthy individuals who desire to observe birds in their native habitats and whose activities have relatively low environmental impact. Among various kinds of eco-tourism, birdwatching has the highest potential to contribute to local communities, educate locals about the value of biodiversity, and create local and national incentives for successful protection and preservation of natural areas. The governments of less-developed nations, local and international NGOs, and birdwatching companies should give priority to birdwatching promotion and education. These organizations should also strive to increase the contribution of birdwatching to rural communities and local grass-root organizations since birdwatching has a significant potential to generate income through the protection and promotion of natural areas."

Recommendations have been made with regards to each *Linking Communities* project site and the partnership as a whole. The key considerations for Mexico have been included as a separate document (Proposed San Blas Birding Route Development Recommendations and Marketing Report)

CANADA: LAKE CHAPLIN AND QUILL LAKES INTERNATIONAL BIRD AREA

The Question of Quill Lakes International Bird Area

There appears to be an uncertainty as to Quill-Lakes international bird areas involvement in the *Linking Communities* project. The stakeholders at Quill Lakes are unaware of the *Linking Communities* project and information at Quill Lakes does not provide information on the *Linking Communities* project or other project sites. Quill Lakes is referred to in *Linking Communities* literature inconsistently and at a local level, their involvement in the project is uncertain.

Strengthening the relationship between the two sites of Quill Lake and Lake Chaplin will add value. Particularly for the Quill Lakes area that is lacking in resources and marketing know how to harness the full potential of the investments made into birding tourism in the past. Linking these sites on a more official basis would add significant value, especially to the Quill Lake area.

The Saskatchewan Birding Trail:

The Saskatchewan Birding Trail (see: www.publications.gov.sk.ca/details.cfm?p=11114) was developed in 2007 with funding from the Saskatchewan Watershed Authority. This is a key output from the Saskatchewan Birding Trail Strategy (Saskatchewan Wetland Conservation Corporation; 1998) although this document is over 10 years old, its findings and recommendations remain valid.

The Saskatchewan Birding Trail is in its present form a missed opportunity. This trail exists only as a downloadable PDF document with information on key birding sites in the province.

The Saskatchewan Birding Trail document does represent a significant effort in information gathering, we have avoided a full critique of this project due to many potential mitigating factors, however it could be significantly strengthened through the following actions:

- Develop a local Birding Route Steering Committee that could implement further activities and actions outlined in the Saskatchewan Birding Trail Strategy.
- The information needs to be made available online as a website tool and include the following components:
 - Details on accommodation options
 - Details on guides and itinerary recommendations
 - Traveling information and detailed maps
 - Getting there, local culture and related travel information relevant to first time visitor to Canada

Birding Weekends and other self generated income opportunities

Several opportunities have also been unpacked whereby the local committees on the ground in Saskatchewan can harness additional income through various eco-tourism activities including, implementing an annual "mega birding weekend", membership schemes and potentially providing basic accommodation facilities at the lakes.

UTAH AND THE GREAT SALT LAKE CITY AREA

The areas around the Great Salt Lake area have very well developed industries, tourism and other. This results in a scenario where "livelihoods" based interventions or small-scale eco-tourism activities are unlikely to make a resounding impact on the economy and as a result unlikely to have a major impact on preventing destructive development. However, the combined eco-tourism value of the Great Salt Lake and surrounding areas is likely to be of significant value as a lobbying tool.

The primary recommendations for strengthening eco-tourism activities at the *Linking Communities* project in Utah would be around the value it could add to the sites in Mexico and Canada from a perspective of being able to access the market.

Utah, Quantify State level market research

Protection of a site where threats are from economic activity with extremely high financial value requires an extremely valuable economic alternative. The current tourism market value in Utah is \$6.2 billion per annum with 66% of that spend being on the leisure market (Kohler S; 2009)

It is recommended to partner with the Utah office of tourism in order to engage and request them to include research into market segments such as eco-tourism and birding tourism

Tracy Aviary as a marketing node

Tracy aviary; with 70 000 plus annual visitors, could play a pivotal role in promoting and marketing the *Linking Communities* Projects, especially eco-tourism activities in Mexico and Canada. The Utah based *Linking Communities* project has a major benefit from an eco-tourism perspective and that is its proximity to the market and the ability to reach this market on behalf of the other *Linking Communities* projects in Canada and Mexico.

LINKING COMMUNITIES GENERAL RECOMMENDATIONS

Bird festivals

The *Linking Communities* Bird Festivals all play a very valuable role in terms of education and awareness. From an eco-tourism perspective the festivals could play a far larger role if these festivals could address the following:

- Become income-generating activities for *Linking Communities'* conservation work.
- Improve profile through branding and communication regarding *Linking Communities* projects on all festival websites and printed materials.
- Encourage broader base of eco-tourism related exhibitors, lodges, tour operators etc...This could also be incentivized as a tool to encourage tour operators to include *Linking Communities* project sites on their itineraries.
- Encourage and develop frameworks to encourage more out of state visitors through offering "packages" and broader marketing.
- Aggressively profile and promote eco-tourism activities at all sites across all festivals.
- The basic strategy should be to turn festival attendees into eco-tourists to other sites; this is where real value could be harnessed.

Eco-tourism committees

The *Linking Communities'* eco-tourism committee needs to be structured to include various portfolios on each area; a critical portfolio to develop would be that of marketing and branding to implement recommendations set out in the *Linking Communities* marketing strategy.

The following actions should also be considered to strengthen the eco-tourism committee and interactions between sites

- Membership portfolio: Private sector involvement: Engaging the private sector is an important action to encourage and play a role in eco-tourism at all three sites.
- Sites and Information portfolio: In Utah, partner with Wasatch Audubon. Wasatch Audubon appears to have developed a good database of eco-tourism / birding sites and related information for the project sites.
- Marketing portfolio: Establishment of marketing sub committees within the eco-tourism committee, this group (or individuals) would be responsible purely for marketing activities such as website updates, marketing co-ordination, brand management and other activities outlined in the marketing plan.

MARKETING

There are a large number of birding tourists who travel in pursuit of their hobby, and in the USA just over 18 million of the 46 million birders travel away from home to watch birds (US Fish & Wildlife Service 2001). In the Canadian Context 30% of adult Canadians go on outings specifically to watch birds, and 20% describe themselves to Statistics Canada as "studying birds" (Saskatchewan Wetland Conservation Corporation, 1998). Annual expenditure on birdwatching in the United States in 2001 was estimated at US\$ 32 Billion (US Fish & Wildlife Service 2001). This type of substantial economic impact from birding is not restricted to developed countries, and in 1999 Costa Rica received over US\$ 400 million in revenue from birders (Sekercioglu 2002).

Of further note for the *Linking Communities* projects is the fact that 77% of birders surveyed in the United States specifically listed watching "waterbirds" as a key activity / favoured

birding activity. (US Fish & Wildlife Service 2001) this bodes well for the *Linking Communities* project's focal area; wetlands.

Linking Communities Brand

The current *Linking Communities*' logo is effective, easy on the eye and overall attractive. However from a tourism and multi-stakeholder ownership perspective, it does not reflect the nature of the organization's work or multiple country scope. Recommendations on inclusions / changes that could be made to the brand / logo to enhance a sense of ownership as well as reinforce conservation message / eco-tourism opportunities have been put forward.

Discussions need to be held and agree on wording / strap line that brings in key elements of the partnership's work and other elements for adjusting. Once agreed, *Linking Communities* can supply ETC-Africa with high-resolution logo for editing into several look and feel options for consideration. A draft option for a logo, which includes some key recommended elements, is included in the full report.

Enhancing Brand Value

Regardless of the potential changes or look and feel to the *Linking Communities* project, guidelines and requirements with regards to use of the logo and mention of the project is an important action to follow up.

All partners need to display the *Linking Communities* Logo on their printed materials and website. Implementing detailed brand use guidelines (brand manual) will probably be met with a relative level of disdain. As a first step, a simple request to use the logo, link between websites and provide information on the projects should suffice.

Important is to communicate the rationale for this, this is not "corporatize" the *Linking Communities* projects but in order to enhance the value of the sites. This creates the conceptual link between the sites in the eyes of the public. The cross marketing benefits of someone visiting Canada for example and being made aware, even at a very subtle brand level of the links to Mexico and potentially the conservation issues carries significant value for the *Linking Communities* Projects and downstream marketing.

A full audit of *Linking Communities* related partner websites and brochures should be undertaken and requests submitted to place branding, links and other key information on these sites or printed materials.

Similarly, a punchy twenty-word description of the *Linking Communities* initiative should be developed and circulated for use on any newsletters, websites and press releases by project partners.

Coordination of marketing activities

Coordination of marketing activities between the three countries should be considered. This does not imply that all marketing activities are undertaken centrally nor does it imply a top down approach to marketing, it merely implies a working together for a consistent approach to marketing as well as "marketing each other" - Coordination of marketing activities would carry value for the following reasons:

- Cost savings, printing brochures or creating electronic media will likely be more cost effective for all parties if costs are shared and coordinated centrally.
- Improved branding and linkages between projects through a consistent look and feel as well as content.
- From an eco-tourist's perspective, constant reinforcement of the conceptual link between the three countries will be crucial for "joining" the products.
- Coordinated marketing efforts will increase the reach and value of marketing activities across the project sites.

Website

The current website (www.utahlinking.org) has a very appealing look, feel and layout and suggested that this remains. The website does however need some modifications and inclusions, these include:

- New landing page with the option to view the website in English or Spanish
- Each menu item, Eco-tourism, Education, and Conservation should have drop down menus for each country in order for content to be more specific to a particular site.
- It is important that the website has content on all pages, pages with little or no content are better off kept hidden until they are populated. Pages such as "links" and "partners" are critical areas for creating a sense of ownership amongst partners as well as improving search engine rankings; both these pages are currently unpopulated.

Other Marketing initiatives

Recommendations have been made on the following additional key marketing actions:

- Printed materials: What printed materials are required and how can they be used to reach the market?
- Trade shows: Using trade shows and direct interaction for marketing and networking.
- Events / word of mouth: Getting birders to use the route, harness the full value of the Bird Festivals and get the project areas into the minds of eco-tourists.
- Ambassadors: Concepts for developing market credibility.
- Trip reports: Harnessing the full value of trip reports and birders visits to the area, especially through social media and e-mail forums
- Developing an ongoing media plan to keep information flowing and consistent.

Specific efforts were made to ensure that the San Blas Birding Route marketing strategy integrates with the proposed *Linking Communities* Marketing Strategy. We have deliberately tried to keep them as aligned as possible as the recommendation is that a joint marketing effort will reach broader markets and strengthen the *Linking Communities* Project as a whole. Should central marketing not be agreed on or not seen as a viable option from a logistical and capacity perspective, the plan could be exported as is (with exception of branding suggestions) to any other project site.

CONCLUSION

The variances across the project's sites in terms of eco-tourism opportunities, market potential and capacity are incredibly varied and require specific interventions at a specific site level to harness the full potential.

From a central *Linking Communities* perspective, the value that can be added is to strengthen and develop the partnership brand, which will in turn create higher levels of awareness and downstream marketing benefits for the *Linking Communities* projects.

Eco-tourism is primarily a service-based industry; the principal products provided by eco-tourism businesses are recreational experiences and hospitality.

These are intangible products and more difficult to market than tangible products such as automobiles or similar. This also makes it more difficult for potential customers to evaluate and compare service offerings. In addition, instead of moving the product to the customer, the customer must travel to the product (area/community). Travel is a significant portion of the time and money spent in association with recreational and eco-tourism experiences and is a major factor in people's decisions on whether or not to visit your business or community.

As an industry, eco-tourism has many components comprising the overall "travel experience." Along with transportation, it includes such things as accommodations, food and beverage services, guides, entertainment, aesthetics and special events. This adds to the difficulty of maintaining and controlling the quality of the experience. To overcome this hurdle, eco-tourism related businesses, and organizations need to work together to package and promote eco-tourism opportunities in their areas and align their efforts to assure consistency in product quality. This is the key role that the *Linking Communities* Partnership can play, facilitating the linking of opportunities to the market (marketing) and linking the private sector to the opportunities (birding sites)