



Linking Communities
WETLANDS & MIGRATORY BIRDS

Proposed San Blas Birding Route Development Recommendations and Marketing Report Executive Summary



Prepared for *Linking Communities* and
BirdLife International

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Executive Summary

This report outlines a potential plan of action and key aspects for consideration in the development of a "Birding Route" in the greater San Blas area of Nayarit State, Mexico. This study was initiated by the *Linking Communities* project and the Rio Tinto BirdLife International Programme with the intention of creating a viable eco-tourism product for the San Blas area that can act as a tool for developing sustainable livelihoods and creating alternative development options in response to the threat of mass tourism development in the San Blas area, developments which will inevitably have a negative impact in the bio-diversity of the Marismas Nacionales and surrounding areas.

A workshop was held with key stakeholders on the 23rd August 2010 in San Blas, Mexico. The overall response was in favour of developing a tool whereby the San Blas area could effectively market and develop itself as an eco-tourism destination, specifically in contrast to areas to the south of San Blas which have been developed as mass tourism destinations and marketed as such by Riviera Nayarit.

The aims of this report are as follows:

- Outline various aspects of a successful eco-tourism / birding tourism route.
- Identify key success factors and strategy for implementation.
- Observations and recommendations with regards to ensuring the feasibility and success of this community based eco-tourism route.
- Specific marketing strategy focused on the potential San Blas Birding Route.

Eco-tourism is defined by the international eco-tourism society (TIES) as "Responsible travel to natural areas that conserves the environment and improves the well-being of local people."

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."

Birding Routes defined

Tourism "Routes" are tourism management mechanism recognized across the world to:

- Manage and control movement of tourists to areas where you want them to go.
- Link a variety of tourism products in a limited geographical area.
- Facilitate joint marketing and cooperation between a variety of tourism enterprises.

Birding Routes build on this concept with a niche market focus and comprise of four basic pillars, Sites, Resources, Accommodation and Guides. The San Blas area is well placed to harness these various components. A comparative analysis has been undertaken and relevant actions outlined in the full report.

The proposed San Blas Birding Route

The following have been identified as key objectives for the potential San Blas birding route going forward into a full implementation phase:

- Create an effective steering committee and management structure including reporting structures with Pronatura as a management body and other key partners
- Establish network of sites and "products" as well as undertake an audit of these sites to align where feasible to Pronatura conservation priority areas.
- Establish a framework for a membership base to lever private sector support and involvement.
- Develop a portfolio of community related eco-tourism infrastructure development projects.
- Funding strategy (including self generated income activities) in place.
- Training and capacity building plan developed. Formal and informal opportunities should be developed including mentoring.
- Implement marketing plan.
- Develop facilities and structures for the route to provide tourism information, reservations and facilitation services to the town of San Blas.

Outlined below are these objectives within the context of a logical framework with indicators and time frames. These should be considered a short-term plan of action to implement eco-tourism activities in the area.

Objective	Outcomes	Indicators	Time frame
Objective 1: Create an effective steering committee and management structure	An effective steering committee with reporting structures, working structures with Pronatura and <i>Linking Communities</i> to drive the project forward, lever volunteer support and implement actions.	Steering committee established Portfolios of, Chairperson, Vice Chairperson, Marketing, Development, sites and resources, treasurer and finances, membership and secretary secured Structure for meetings and regularity agreed Constitution adopted.	4 weeks from inception
Objectives 2: Establish network of sites and "products"	A complete audit of sites, resources, activities and accommodation within the catchment of the San Blas tourism area. This information will be captured in such a format that it can be exported / used easily for marketing materials, conservation planning as well as development planning	Clear boundaries for focus defined (i.e. what is the exact scope of the area to be included under the project, the entire Nayarit province or areas within a 50 km radius of San Blas?) All birding sites round San Blas documented All birding and eco-tourism related activities linked to	3 months from inception - updated bi annually

		<p>sites documented</p> <p>All surrounding infrastructure, threats and opportunities documented for use in future planning</p>	
<p>Objective 3: Establish framework for membership base</p>	<p>Membership system developed whereby private sector stakeholders can play an active role in the route, generate benefits and support the project.</p>	<p>Membership benefits and costs agreed</p> <p>Membership application documentation developed.</p> <p>Service charter and minimum membership requirements implemented.</p> <p>Membership drive initiated with public meetings for all private stakeholders.</p> <p>Route generating income from marketing and listing members.</p>	<p>2 months from inception and ongoing</p>
<p>Objective 4: Project development</p>	<p>Concepts and business plans developed for infrastructure and other development projects that will add value to conservation and eco-tourism efforts.</p>	<p>Communities at key sites for potential eco-tourism development engaged and project plans developed.</p> <p>Business plans and proposals for financing opportunities drawn up.</p>	<p>Ongoing</p>
<p>Objective 5 Funding strategy in place</p>	<p>Strategy in place to finance the project over the short to long term, this includes self generated and grant funding</p>	<p>Business plan for the route developed with intention of becoming self-sustaining in 5 years.</p> <p>Self generated income sources harnessed.</p>	<p>Ongoing - basic draft within 6 months of inception</p>
<p>Objective 6: Training and capacity building</p>	<p>Community members along the route receive training and capacity building opportunities as a result of the route. These trainees also receive ongoing</p>	<p>Skills audit undertaken for the route area. Have a clear understanding of training requirements.</p> <p>Course developed</p>	<p>Ongoing. Developing plan of action and sourcing partnerships with training providers within 6 months of inception</p>

	<p>support and mentorship from the route</p>	<p>which can provide basic eco-tourism guiding training to interested candidates.</p> <p>Partnerships developed with suitable institutions or training providers where feasible.</p> <p>Mentorship programme developed where private sector guides and accommodation establishments offer hands on experiential training.</p>	
<p>Objective 7: Implement Marketing plan</p>	<p>The route is marketed nationally and internationally. The San Blas Birding Route is able to quantify socio-economic benefits from eco-tourism in the region.</p>	<p>Route makes positive impact on occupancy rates at local establishments.</p> <p>Increased tourism revenue to sites along the route.</p> <p>Route profiled electronically and in printed media nationally and internationally.</p> <p>Route sustaining ongoing presence in birding market through variety of email forums, newsletters and media</p>	<p>Ongoing. Immediate actions outlined in marketing plan to be implemented within 6 months of inception</p>
<p>Objective 8: Route providing tourism information, reservations and facilitation services to the town of San Blas</p>	<p>Route has established office in San Blas which acts as central tourism information office, booking office and central point of contact for eco-tourists visiting the region</p>	<p>Route office established.</p> <p>Tourism information centre established at route office.</p> <p>Office providing local tourism functions to further support eco-tourism</p>	<p>12 months from inception</p>

Market size

Significant market research has been undertaken into the eco-tourism and birding tourism market size in the United States and Canada, less so for Mexico however the assumption can safely be made that Mexico's core target markets would be from the United States.

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). 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 (Sekerciouglu 2002).

An analysis of Birding Tour operators that included San Blas on their itineraries was undertaken. Estimates were extrapolated to quantify the direct economic value for San Blas (excluding any multipliers). This was estimated to be at least \$67 200 per annum for the San Blas economy. Assuming organized tours make up 40% of the market and the balance of self drive birders make up 60% of the local market (Pers comms M Stackhouse, 2010) then the value of self drive birders is in the region of \$100 800. The direct total economic value from just organized tours and self-drive birders (excluding general eco-tourists and other experiential travelers) is potentially \$168 000 per annum.

We believe this figure to be extremely conservative as it does not count multiple departure tours, smaller companies that did not respond to questionnaire, tailor made tours or generalist birders which may not be "noticed".

Marketing actions

To harness this market effectively a focused marketing strategy needs to be implemented. Actions included in this strategy are:

- Branding and logo: How will the route position and brand itself?
- Target markets and market mix. Who should the route target and how can they be reached?
- Website: What information is required and how should the website should be structured?
- 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 San Blas Birding Festival and get the area into the mind's 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.

Conclusions

Considering the potential market size within a relative close proximity (compared to competing products such as Costa Rica, Brazil etc...) The San Blas Birding Route has high potential for success. The area has the tourism infrastructure, the established reputation and the product. In addition to this the area has high levels of threat from mass tourism and unsightly development that would detract from the area's sense of place and certainly have a negative impact on the area's bio-diversity. This project could have the potential to provide direct and quantifiable benefits to the local economy and downstream indirect positive

impacts on conservation and attitudes towards conservation by providing livelihood opportunities to communities through eco-tourism.

Key to the success of this project will be increasing the human resource capacity on the ground for at least three to four years during the project's implementation phase. Eco-tourism is based on a highly competitive market; tourist's expectations in terms of service and delivery are high. Managing expectations and ensuring delivery on the ground will be critical to ensuring long-term support for the project (and ultimately its sustainability) - all of this is reliant on focused human resource capacity and committed coordination and delivery in the early stages, actions which would only realistically be feasible with a paid, accountable project manager.

Dr. Cox