



Green Honeycreeper
Alvaro Jaramillo

Bird Tourism Market for Guatemala

Economic and Market Snapshot of the Bird-Based Tourism Sector

Economics of Bird Tourism in Guatemala

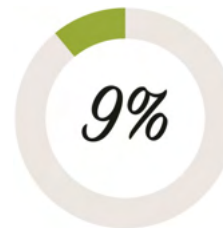
Guatemala, the largest country in Central America with nearly 15 million people, is a “biodiversity hotspot”¹ - officially designated as a Megadiverse Country- with three distinct regions: the Atlantic slope lowlands, central and northern highlands, and Pacific slope lowlands. Over the last 20 years, Guatemala has experienced a boom in tourist infrastructure and a rise in international arrivals.² Tourism remains, however, a relatively modest economic activity. In 2014, tourism contributed GTQ 40 billion (US \$5.2 billion) to the economy or 8.8% in total GDP. Tourism is projected to remain at about 8.8% of total GDP through 2025. Tourism generated 489,000 jobs or 3.8% of total employment in 2014 and this percentage is projected to remain flat through 2025.³

Guatemala’s Tourism Board describes the bird watching market as an “important segment that contributes to the protection of the natural and cultural heritage as it motivates the formation and assistance to the protected areas and the development of community-based tourism projects.”⁴ Over half of international birders to Guatemala come from the US, Canada, and Mexico. The number of birding groups coming to Guatemala as reported by the Guatemala Birdwatching Roundtable (ANA)- made up of private businesses, communities, and government agencies- tripled from 2008 (45) to 2011 (123). Some 88% of birders spend 1 – 7 days in Guatemala, with an average stay of 3.7 days, according to 2014 government statistics. Other sources report an average trip length of 11-14 days.⁵ [The shorter trip length may be attributed to individuals who travel over the border from Belize and only visit the Peten region.]

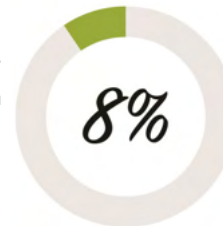
Government and private sector sources show that around half of birders travel with tour companies, and half travel independently.⁶ Average daily spending varies from \$69 (government statistics) to \$155 (2012 report by ANA)⁷. The ANA estimates hard core birders are on average 50yr, where soft birders are on average 45yr. Government statistics show even younger figures: 51% of birders are 26–35yr and 82% are under 45yr.⁸ **Government statistics suggest that birders in Guatemala are younger and have a lower budget than those in some other countries.**⁹ **However, further data needs to be collected to better estimate the birder’s profile, especially with regard to average daily spending.**

The Destination

Guatemala has more than 700 bird species, 150 of which are regional endemics¹⁰ to southern Mexico and northern Central America.¹¹ Birding in Guatemala is good all year round and birders can see on average 219 birds. The richest birding area is the Atlantic slope lowlands, holding more than 500 species. However, most endemics occur in Guatemala’s highland forests, and Tikal is the most popular birding area.¹² Guatemala has 21 IBAs (Important Bird and Biodiversity Areas),¹³ covering 47% of the country.

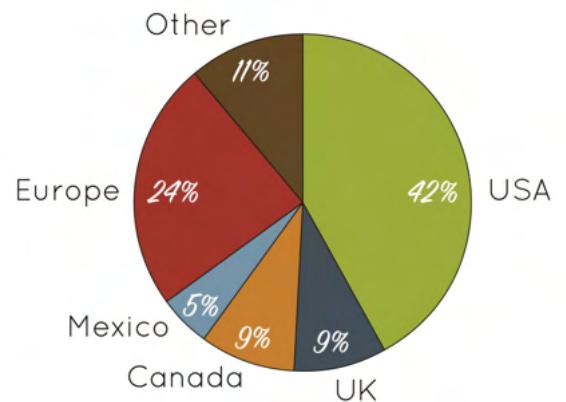


Total contribution of Travel & Tourism to GDP in 2014.

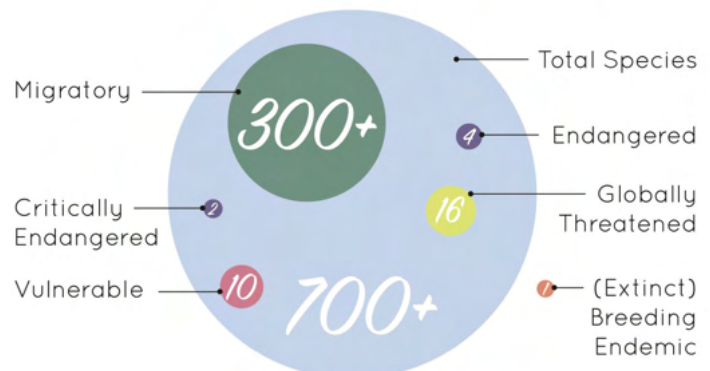


Total contribution of Travel & Tourism to employment in 2014.

Guatemala Tourist Arrivals



Guatemala Bird Snapshot



Of these IBAs, 11 (listed in the map below) have tourist destinations of international standards, with access roads, birding trails, viewpoints, lodges, restaurants, and local guides.¹⁴ There are a total of 42 destinations with bird-watching facilities. **Several are described as “world-class birding sites” and new birding destinations are under development.**¹⁵ Guatemala has developed five bird watching tourist routes: Central Highlands, Pacific-Coast line, Caribbean-West, the Verapaces, and the Peten.

Challenges and Threats

While Guatemala has gained significant traction in recent years as a top bird watching destination, safety and security concerns remain a challenge. Guatemala’s main regional rivals, Costa Rica and Panama, are well established, safe birding destinations.

Birds in Guatemala are threatened by habitat loss, poaching and illegal trafficking. According to the University of Maryland’s Global Forest Change (2000-2012), Guatemala has the 2nd highest deforestation rate in Latin America (after Paraguay) and the 4th highest in the world. Protecting bird habitat is challenging, as the human population is expected to double between 2010 and 2050, increasing pressure on natural habitats.¹⁶

The Future

Low impact birding can provide “particularly valuable economic support”, especially for private reserves which comprise the majority of Guatemala’s protected areas and are considered “of key importance for bird conservation.”¹⁸

Tour operators and the Guatemalan Tourism Board predict that the bird tourism market will grow modestly in coming years. Tour operators indicate the need for more awareness of the country’s natural heritage; more specialized, bilingual guides; updated promotional materials; and quality standards for birding infrastructure and services.¹⁹ INGUAT and the ANA have created a wealth of information on the birding market and bird-watching in Guatemala—more than some other countries that receive larger number of birders. The government and private sector should: 1) prioritize this higher value market segment using the existing wealth of information and by engaging informed stakeholders; 2) view and position it as a sector that- although smaller- yields higher value than traditional tourism; and, finally, 3) reach out more directly to birders via media that they use to make travel decisions.

Endnotes

¹ Visit Guatemala (2015). “What to do in Guatemala”. <http://www.visitguatemala.com/en/planning/what-to-do-in-guatemala#.VSwVQJPA3fc>.

² Knut Eisermann and Claudia Avendaño (2009). “Important Bird Areas of the Neotropics: Guatemala.” *Neotropical Birding* 5. http://www.cavaya-birding.com/Eisermann_Avendaño_2009_IBA_Guatemala.pdf.

³ WTTC (2014). *Travel & Tourism Economic Impacts 2014: Guatemala*. <http://www.wttc.org/-/media/files/reports/economic%20impact%20research/country%20reports/guatemala2014.pdf>.

⁴ Visit Guatemala (2015).

⁵ Cloudbirders (2013). “Trip reports for Guatemala.” <http://www.cloudbirders.com/tripreport/>; Interview with Irene Rodriguez (April 2015). Operador Latino.

⁶ Cloudbirders (2013). And email from market research dept. INGUAT.

⁷ “Profile of the Visitor – Birdwatching” (2014). Preliminary Data. Investigación de Mercados. Sección Estadística. Instituto Guatemalteco de Turismo – INGUAT.

⁸ Ibid. And “Informe de Logros y Avances 2008-2011” Mesa Nacional de Aviturismo. 2012.

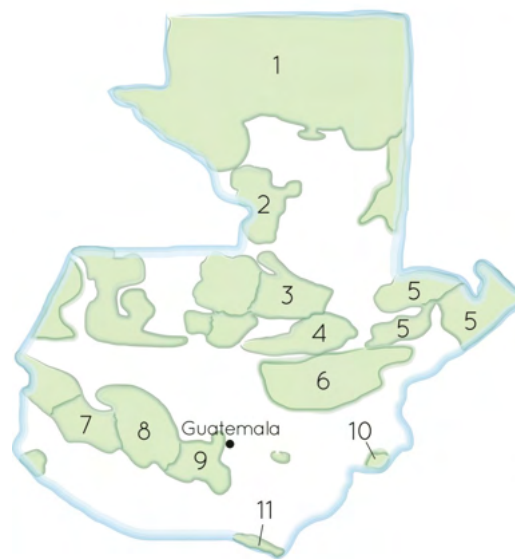
⁹ Ibid.



Profile of a U.S. Birder in Guatemala

- Highly educated
- Mostly (58%) female
- Relatively young
- Travel in small groups
- Organize their own trips
- Stay an average of 3.7 days
- Spend relatively little: \$69 per day
- Sight average of 219 birds

Important Bird and Biodiversity Areas in Guatemala



1. Maya-Lecandón
2. Rio La Pasión
3. Candelaria-Campur
4. Yalijux
5. Caribe de Guatemala
6. Sierra de las Minas-Motagua
7. Volcán Santiaguito
8. Atitlán
9. Antigua Guatemala
10. Montecristo
11. Monterrico-Rio La Paz

¹⁰ Visit Guatemala (2015).

¹¹ Mike Nelson (May 20, 2013). “Birding in Guatemala: An Overview.” Nature Travel Network. <http://naturetravelnetwork.com/intro-to-guatemala/>.

¹² Knut Eisermann and Claudia Avendaño (2009).

¹³ BirdLife International (2015). Country profile: Guatemala. <http://www.birdlife.org/database/country/guatemala>.

¹⁴ Ibid.

¹⁵ Ibid.

¹⁶ Ibid.

¹⁷ Ibid.

¹⁸ Email interviews. (April - May 2015). Jorge Mario Samayoa, Natural Heritage Section Chief, Department of Planning, Product Development Division, INGUAT; Irene Rodriguez, Operador Latino, Guatemala; Lileana Martinez, Martsam Travel, Guatemala; Silvia King, Market Research and Analysis, INGUAT; Richard Fray, Fund Birding Tours, Arizona; and Marlon Calderon, Viva Atitlan, Guatemala.

