



Rutland Bird Fair Tour Operator Report

**Prepared by PromPeru
UK Representative**

30.08.07

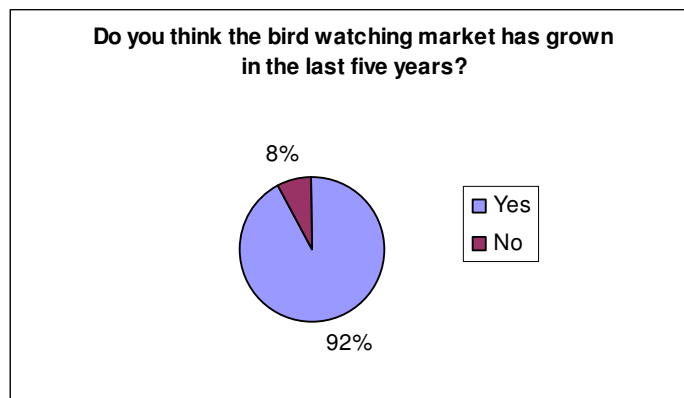
1.0 Overview

The following analysis is based upon the data resulting from a tour operator survey carried out on behalf of PromPeru at the Rutland Bird Fair in August 2007.

The survey results represent the views of 53 of the tour operators who had stands at the bird fair, every tour operator who was willing to participate in the survey. Some tour operators were not willing to participate in the survey and so the results do not represent the views of every tour operator at the fair. The survey questions identified; whether or not tour operators felt the bird watching travel market was growing, which countries and which type of tours showed the most growth potential, which countries were currently the most popular bird watching destinations, from which countries most bird watching travellers originate and how long they spend traveling, the percentage of tour operators selling Peru as a destination, what knowledge the tour operators have about Peru as bird watching destination and finally how they feel PromPeru could work most successfully with them in developing bird watching tours in Peru.

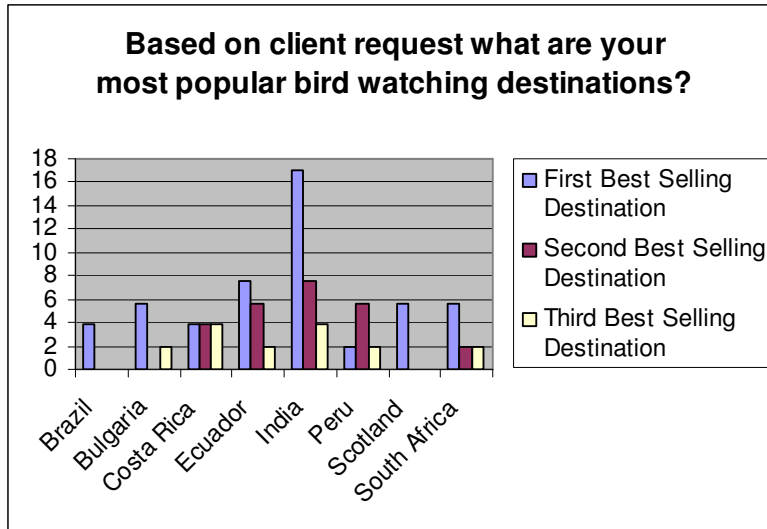
2.0 Findings

Of the tour operators questioned there is almost universal consensus that bird watching is a growing market.

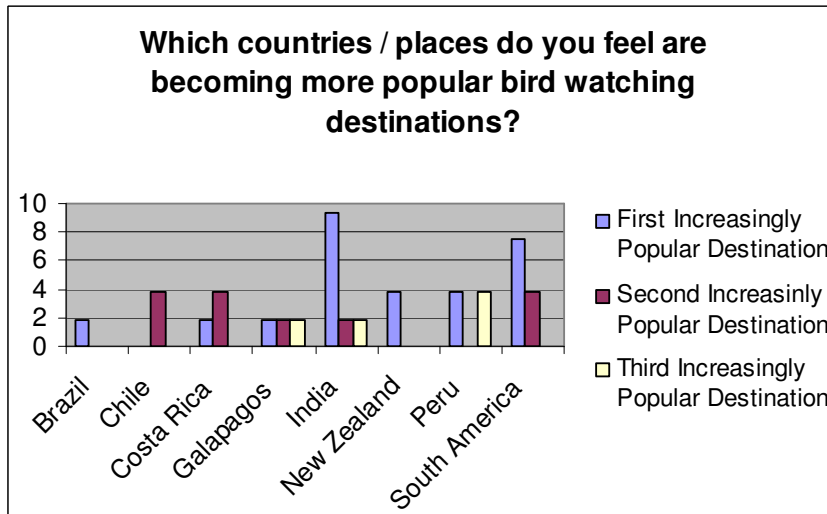


When asked to identify the strongest selling of the countries they offer India, as can be seen from the graph below, is selling best. Brazil, Ecuador and Costa Rica were all named as popular first choices, Ecuador in particular. However, this does not

mean that Peru is not selling as well as Brazil, for example, because Peru was mentioned both as a second and third best selling destination and Brazil was not.

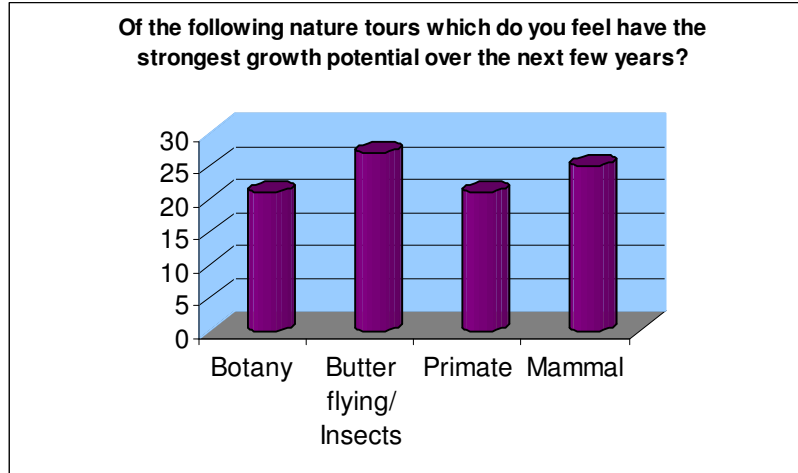


The next graph indicates that the entire South America bird watching market is seen as becoming a more popular choice. This is very positive feedback particularly as Peru was named most frequently, over Brazil and Chile for example, as an increasingly popular destination.

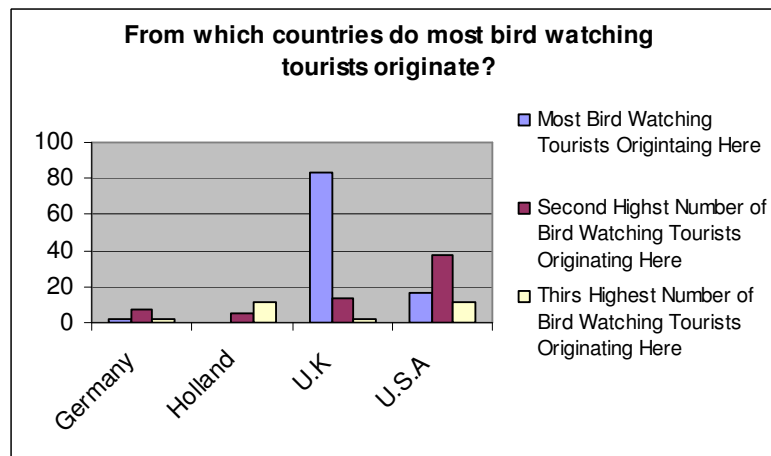


From looking at the Consumer Rutland Bird Fair Report most bird watching tourists do not only bird watch on their holidays, they prefer to combine bird watching with other tours. The majority of the tour operators identified Butterflying and Insect tours as the fastest growing nature tour. In particular Dragonfly watching, which came up a

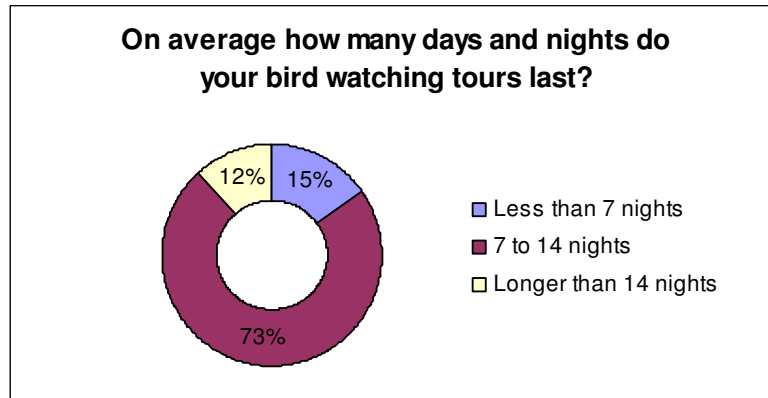
number of times in the 'Other' category of this question, was mentioned because Dragonfly's share a number of characteristics with birds in the way you identify different species and the habitat they can be found in etc.



Most of the tourists going on these tours originate from the U.K, which is not surprising as the Rutland Bird fair, although one of the biggest birds fairs in Europe, is a U.K based event. The U.S.A was the next main source of bird watching tourists, far ahead of any other country.



As the consumer report suggested bird watching tourists tend to prefer longer holidays, this is supported by the tours offered by tour operators. It is important to note that whilst most tour operators did give seven to fourteen nights as an approximate time scale a number of operators offer tailor made tours, the length of which can vary widely.



The tour operators were also asked which services they provided and offered a choice of; Accommodation, Restaurants, Domestic Transportation, International Transportation and Specialized Gear. The majority offered all these things, with the only exception being International Transportation which only 31 out of the 53 companies questioned provided. It is also worth noting that whilst most companies could provide specialized gear many did not feel called upon to do so as in their experience serious bird watchers normally owned their own equipment. The tour operators were also asked to number in order of importance from 1 to 5 (with 1 being the most important and 5 the least) the following destination characteristics; Safety, Infrastructure, Flight Access, Local Tour Guides and Specialized Information. On average these characteristics ranked as follows:

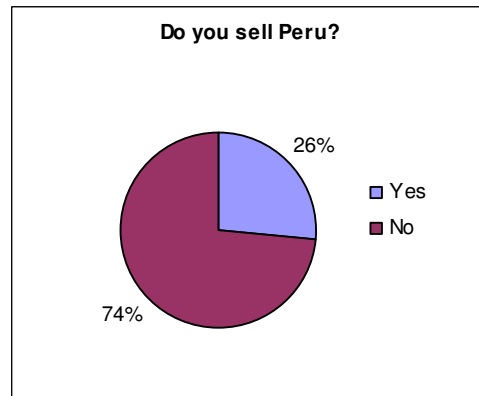
Most Important	2.5	Local Tour Guides
	2.5	Specialized Information
	2.8	Safety
	3.1	Infrastructure
Least Important	3.7	Flight Access

The tour operators seemed to feel that it was the quality of information available from local tour guides that really distinguished a destination.

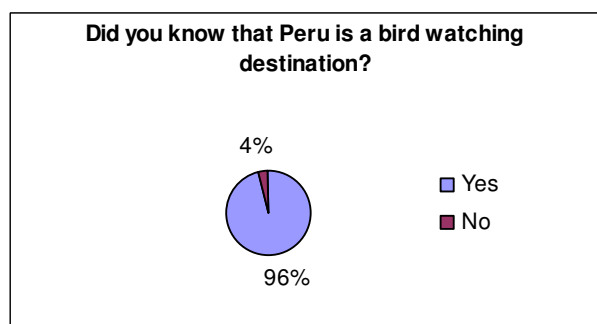
At present the majority of bird tour operators do not offer Peru as a destination. There could be many reasons for this. A number of the tour operators interviewed only

operated in certain areas such as the U.K or Africa for example or even in just one country like South Africa.

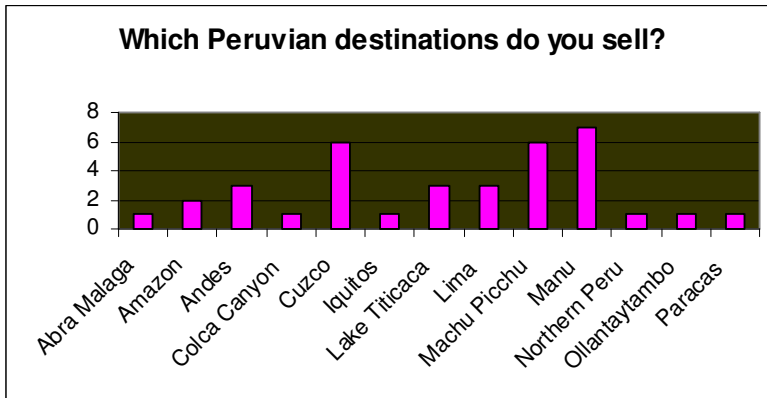
Tour operators also said that they liked to change their destinations on a regular basis in order to cater for repeat clients. This means that whilst they may have answered in the negative to this question this year they have run tours to Peru in the past and / or intend to run them in the future.



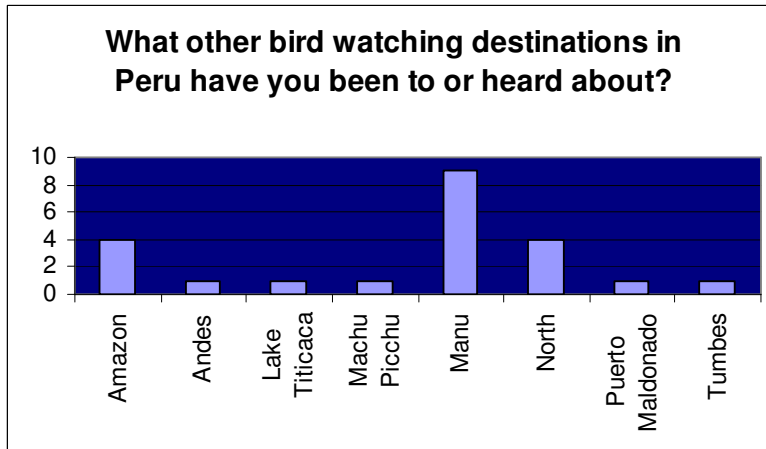
Given the continued possibility of tours to Peru being offered in the future it is very positive feedback to learn that almost all of the tour operators were aware that Peru was a bird watching destination.



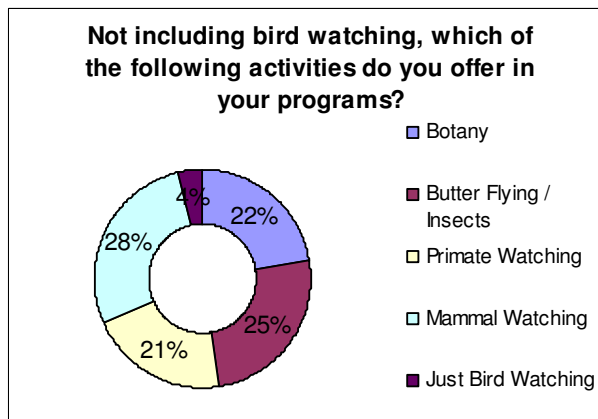
Of those tour operators that did offer Peru as a destination Manu proved to be one of their preferred tour destinations though as they try and incorporate key tourist attractions into their tours it is not surprising that Cuzco and Machu Picchu were almost as popular as Manu.



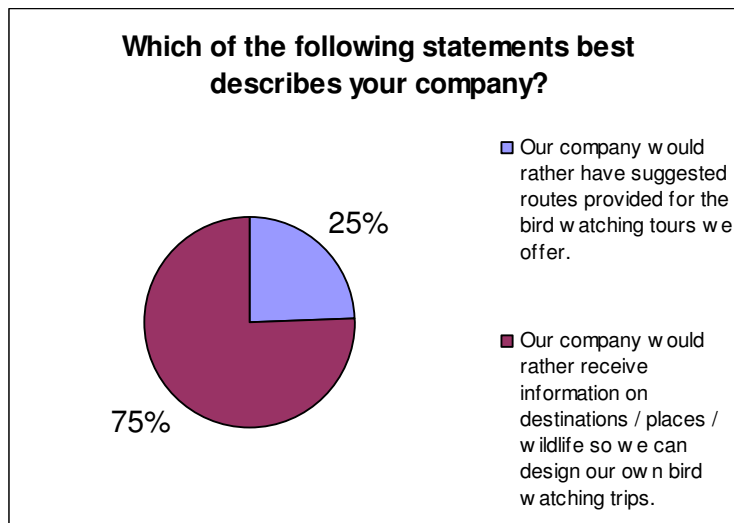
Of the bird watching destinations that the tour operators knew about, even if they did not offer tours there, Manu, Northern Peru and the Amazon were most well known.



Outside of bird watching the other tours offered was evenly split with only a very small number of operators catering to solely bird tours.



The final question put to the tour operators endeavored to discover how tour operators felt tourist boards could be most helpful to them and their development of bird watching tours. An overwhelming majority felt that receiving updates from tourists boards about; hotels available, new transport links and good bird watching areas would be helpful rather than suggested routes. Often the reason for this preference was that the tour operators preferred to develop their own tours so that they could ensure they were original and not over crowded by other visitors.



3.0 Conclusion

From 53 tour operators interviewed, an overwhelming 92% agreed that the bird watching market was growing.

Three countries outside of South America were rated as the most popular, India, South Africa and Scotland. However, several South American countries were recognized as popular, led by Ecuador.

Factors relating to the planning of a birding holiday showed that the average length of stay was between 7 – 14 nights and other areas are growing in popularity, in particular butterflying.

Tour operators interviewed, rate a local guide as one of the most important services which should be offered. Flight access was not an overwhelming important factor.

Whilst 74% of the tour operators did not sell Peru themselves, several tour operators present at the bird fair were specialized in particular continents, for example, Africa. However, 96% of the operators were aware of Peru as a birding destination.

Within Peru, the operators selling the destination focused particularly on Manu, Cusco and the Amazon. Combined visits to Machu Picchu were also popular. Most operators sell birding tours in conjunction with other activities, botany, primate and mammal watching were rated in almost equal importance.

75% of tour operators prefer to design their own routes but receive the information and options from suppliers.

It can therefore be concluded that in the lucrative market of bird watching, Peru has the potential to grow its business through the UK travel trade. In terms of local competitor destinations, Ecuador is the most popular.

With continued promotion of Peru's opportunities for bird watching, there is a potential for Peru's market share to grow.