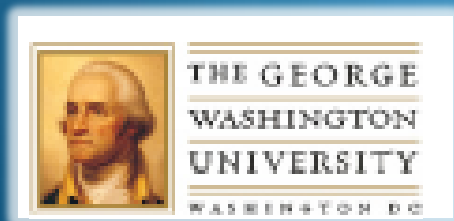


# Perceptions of Bird Watching Tourism in Ethiopia

A Survey of Outbound Tour Operators



**Conducted by:**

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**With assistance from :**

**Solimar International**

**Ethiopia Sustainable  
Tourism Alliance**














# Survey Methodology

Solimar International designed 30-question online survey

Solimar and GWU students identified 46 international bird watching tour operators to contact by e-mail

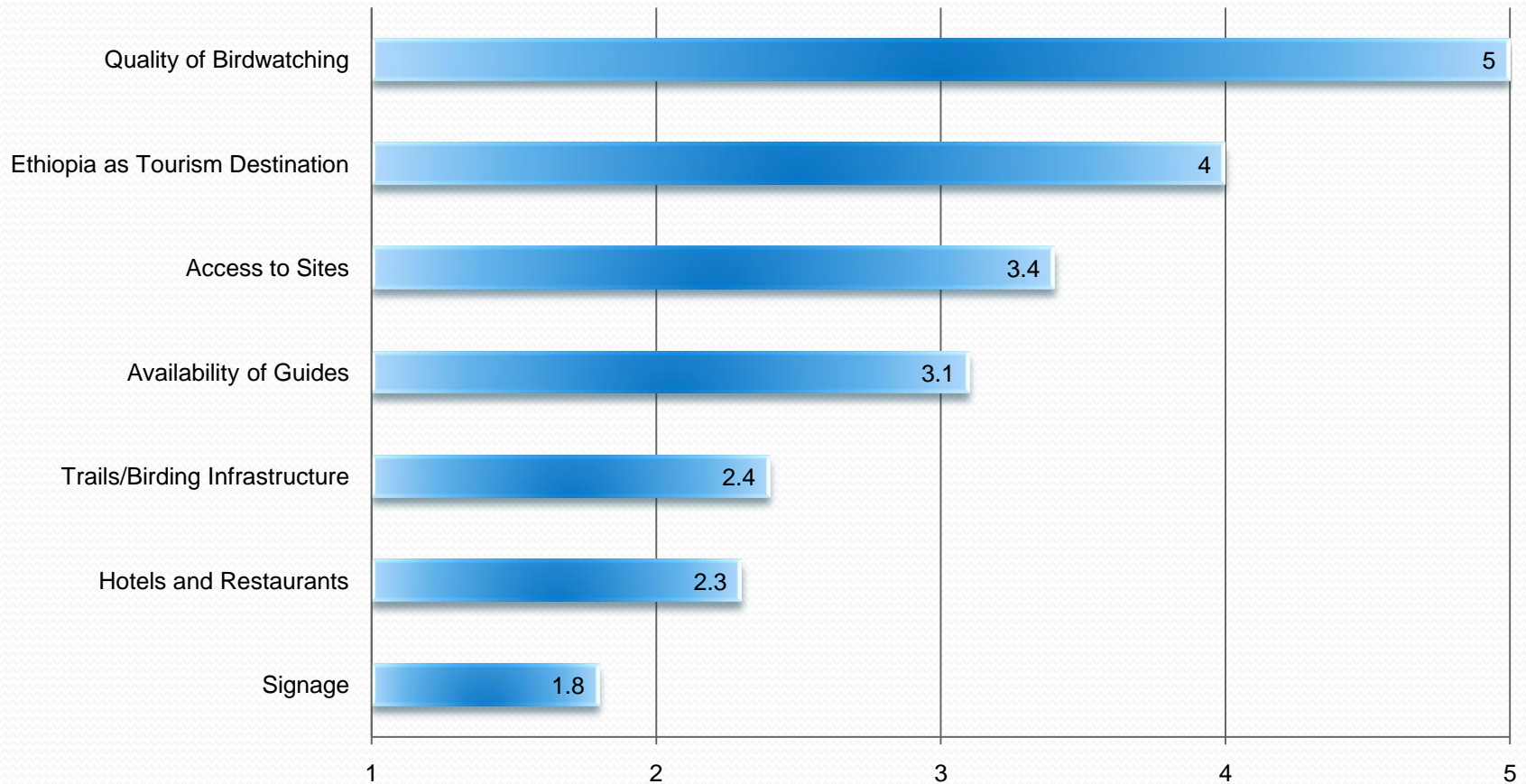
GWU students conducted follow-up by phone with non-responsive operators, receiving a total of 16 responses

# Participating Tour Operators

Operators Offering Tours in Ethiopia	Operators Not Offering Tours in Ethiopia
Pangeans Safari 	Journeys, Intl. 
Birding Ecotours 	Letaka Safaris 
Rockjumper Birding Tours 	Distant Horizons 
Ecotours 	Africa Adventure Consultants 
Sunbird 	Aim 4 Africa Ltd. 
Birdwatching Breaks 	Close Encounters 
Bird Quest 	
AviFauna Nature Tours 	
Footloose 	

# Operators Currently Offering Tours in Ethiopia

# What is your impression of the following in Ethiopia?

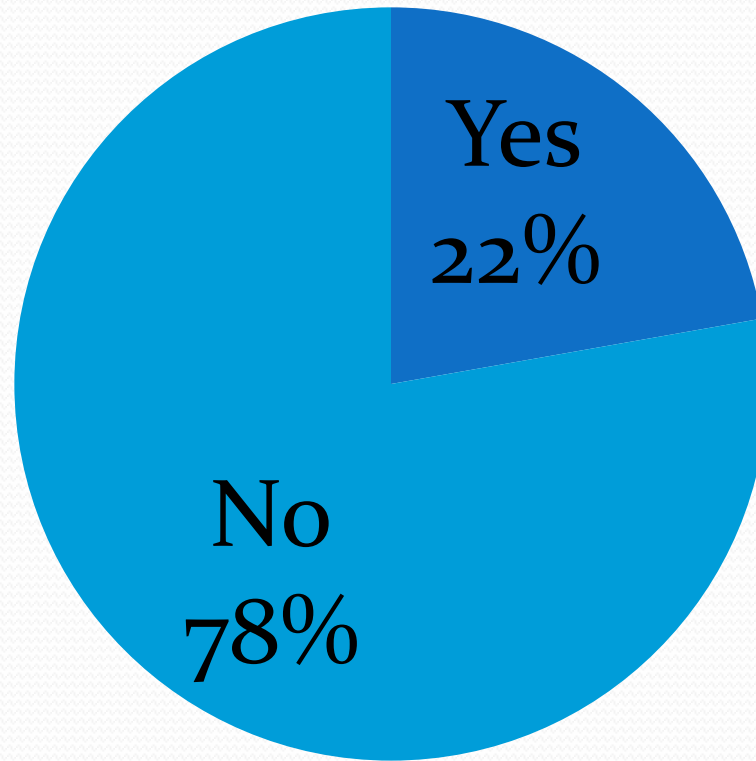


Excludes "Don't Know" responses

Have you noticed an increase or decrease in demand for tours to Ethiopia over the past 3 years?

30% Increase	5% Decrease	No Change
3	2	2

# Is Ethiopia realizing its potential for the bird watching market?





# What can be done to help Ethiopia better reach its potential?

More conservation efforts in sustaining and protecting the general ecosystem of bird life, and educating the local community of the importance of conservation of wildlife and the land.

Accommodation is shocking but birding is absolutely incredible

I believe that tour operators like ourselves should help train local guides whilst on tour and sponsor verifiable organizations that aim to develop birding in Ethiopia.

Designated protected areas should have personnel with equipment, because most areas are without any real protection. Locals use protected areas for agriculture, grazing, logging and habitats are vanishing rapidly.

# What can be done to help Ethiopia better reach its potential? (cont.)

A training program for local guides. More attention paid to nature conservation in general. More basic lodges in remote places

More publicity - magazines, articles on birds, advertising, info on other animals

Train more local guides and operators.

Better accommodations, tourist quality, camping facilities in Simian mtn.

# How can Ethiopia as a destination better market its bird watching opportunities to help support tour operators like yourself?

Understand the great potential of bird watching destination and attract investment in these areas as opposed to focusing on allocating important areas for farming.

It's already extremely well-known as a birding destination but most of our clients find it very rough infrastructure-wise (awful roads and accommodation)

Ethiopian tourism should be involved in more marketing, especially at the British Birding Fair and from 2011 onwards, the American Birding Association is operating a similar Fair to the one mentioned above.

Putting emphasis on nature conservation and promoting it on a national level. Maintaining existing hotels, supporting the construction of hotels in the Negele region.

# How can Ethiopia as a destination better market its bird watching opportunities to help support tour operators like yourself? (cont.)

Many people already know Ethiopia is a good place to watch birds. They are put off by concerns of safety and stories of poor infrastructure

Sufficient support already offered

Propose more bird watching trip packages.

More active marketing, better operator engagement from government

**Operators Not Currently  
Offering Tours in Ethiopia**

# Is there a reason for your company not offering tours to Ethiopia?

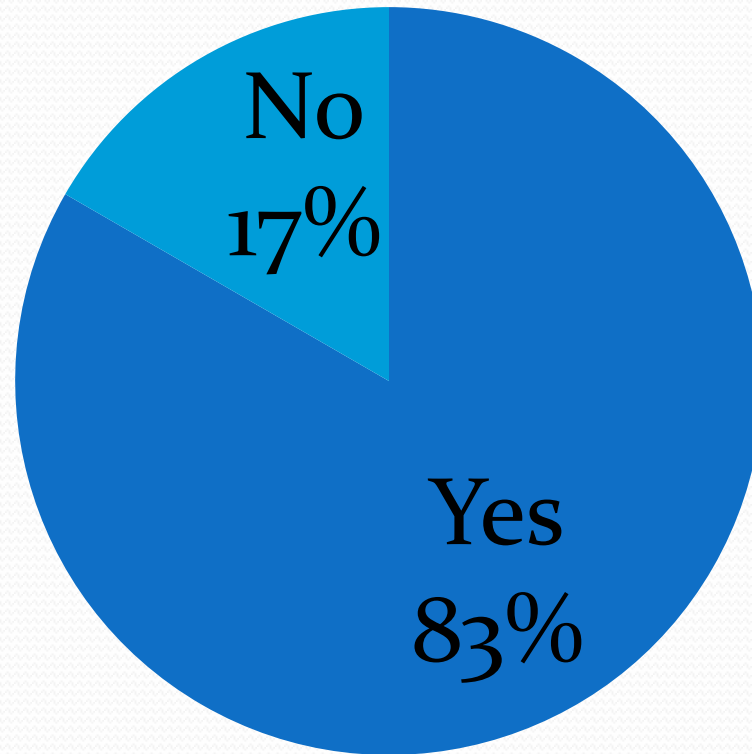
Irregular quality of services

We haven't yet established links with local tour operators. Company staff haven't visited Ethiopia yet - this is essential if we are to offer our services to the general public.

We offer tours to Ethiopia, though not targeted at the bird watching market

We have not yet visited Ethiopia

# Would you consider offering tours to Ethiopia in the future?



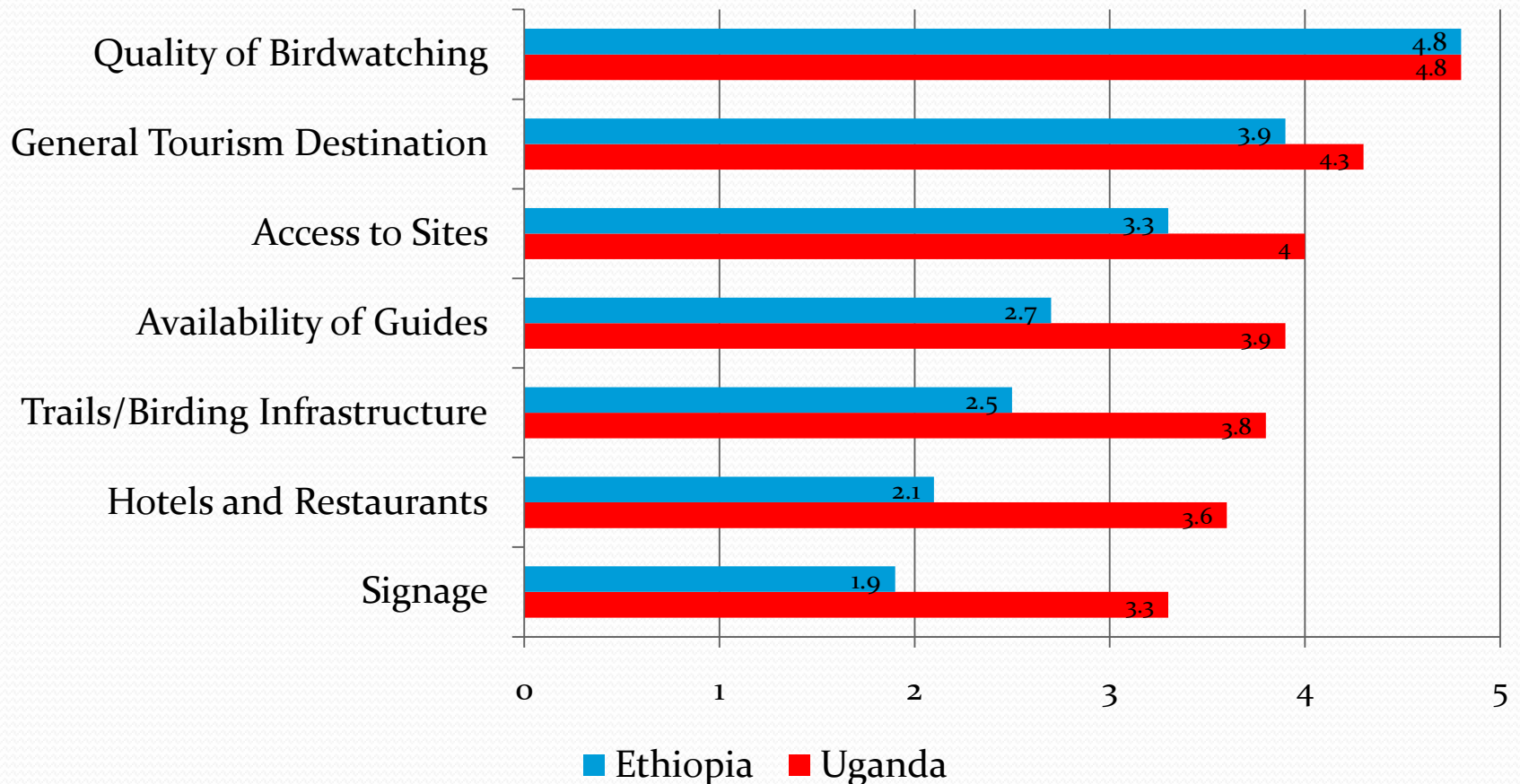
What specifically would need to take place for you to begin sending tours?

Need 100% reliable operator with knowledgeable guides.

Knowledge about Ethiopia in general, bird watching sites and other national parks/heritage sites, knowledge of accommodations, general infrastructure, ground operator information (guides and services), ornithological information to relay to our clients, etc









# Perception of birding services Ethiopia vs. Uganda



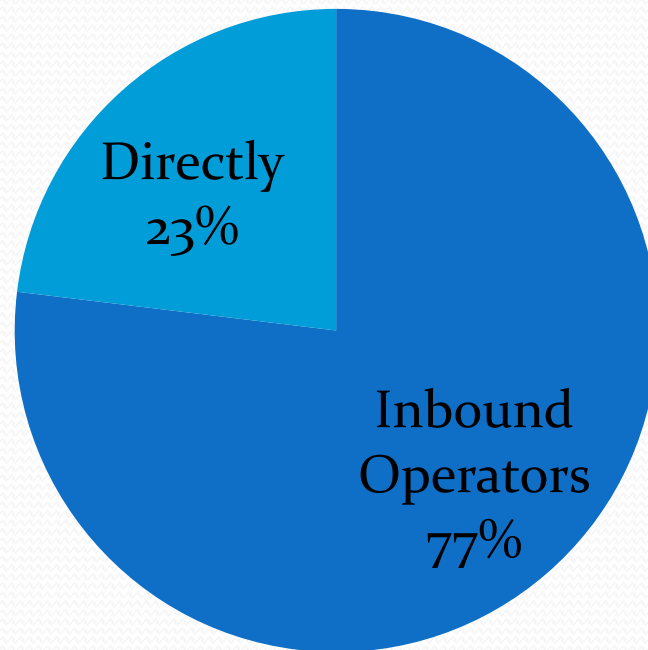
Includes all surveyed operators. Excludes "Don't Know" responses

# What countries are your clients from? (list up to 3)

UK 	13
USA 	9
Europe 	4
Australia 	3
Spain 	2
Sweden 	2

N. America 	2
Canada 	1
Denmark 	1
Germany 	1
Netherlands 	1
Norway 	1

Do you primarily run your tours directly or through inbound operators?



# How does your business identify new products to include in its offering?

Field visits, trade shows, direct approach from local operators

We always visits and make a study of new areas before offering to our customers

We keep our fingers on the global pulse of birding destination hotspots and usually introduce at least 2 new destinations annually.

Through requests of our customers, through own market research and through information obtained at the British Birdwatching Fair.

# How does your business identify new products to include in its offering? (cont.)

Email communications, trade shows, site visits

Internet research

Research, networking, visits, exhibitions

Research into markets, destinations, customer feedback, travel exhibitions