



# Bird Tourism Market for Paraguay

Economic and Market Snapshot of the Bird-Based Tourism Sector

## Economics of Bird Tourism in Paraguay

Paraguay, a land-locked and until relatively recently, an isolated country with an economy centered on cattle, is known as "South America's Forgotten Corner."<sup>1</sup> Its small tourism industry contributed, in 2014, a modest PYG 5.7 trillion (US\$ 1.1 billion) to total GDP and 113,500 jobs to total employment. By 2025, the total contribution is projected to reach PYG 8.2 trillion (US \$ 1.6 billion) and to be generating a total of 141,000 jobs.<sup>2</sup>

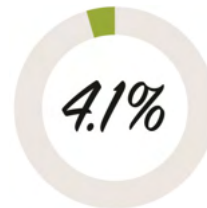
Although underdeveloped, **tourism has been growing steadily**, from 465,000 arrivals in 2010 to 648,982 in 2014.<sup>3</sup> In 2014, over 80% of the international overnight arrivals came from Paraguay's two largest neighbors: Argentina with 308,367 and Brazil with 183,322. U.S. arrivals were 19,204, followed by Spain with 11,740 arrivals and Germany with 9,862. Arrival numbers from Argentina have been growing most rapidly, from 30% in 2008 to 45% in 2013 to just over 50% in 2014.<sup>4</sup>

In 2014, total tourism revenue was US\$283 million, including both overnight and day visitors. The 648,962 overnight visitors spent on average \$351 per trip, generating a total of \$228 million, while 2.8 million day visitors spent on average only \$20 per visit, generating a total of \$56 million from day visitors.<sup>5</sup> Interestingly, the number of international visitors who report coming for "vacations" is only 16% for overnight visitors and 35% for day visitors; two-thirds of overnight tourists come to visit friends and family, while one-third of day visitors come for business.

Although not specific to bird tourism, the government's airport surveys report that **54% of overnight tourists and 13% of day visitors chose Paraguay for its natural attractions— a useful indicator of potential interest in bird tourism.** On the government's official tourism website, bird watching is one of its featured nature-based activities.<sup>6</sup> Tourism has grown about 35% over the past five years, and in 2014, **Paraguay was named one of "the most outstanding exhibitors" at the FITUR International Tourism Trade Fair, where it effectively displayed "its potential as a nature tourism destination."**<sup>7</sup>

## The Destination

Although a relatively unknown birding destination, **Paraguay offers a variety of ecosystems with many regional endemic species, opportunities to see mammals, and compatibility with major tourism attractions.** Paraguay has "a high avian diversity"<sup>8</sup> with 712 species recorded.<sup>9</sup> BirdLife International delineates 57 Important Bird Areas (IBAs), covering 8% of Paraguay,<sup>15</sup> of which around 10 receive more tourism than the others.<sup>16</sup> The San Rafael Reserve and Bosque Mbaracayú (Paraguay's first UNESCO Biosphere Reserve) are each home to over 400 species of birds.<sup>17</sup>

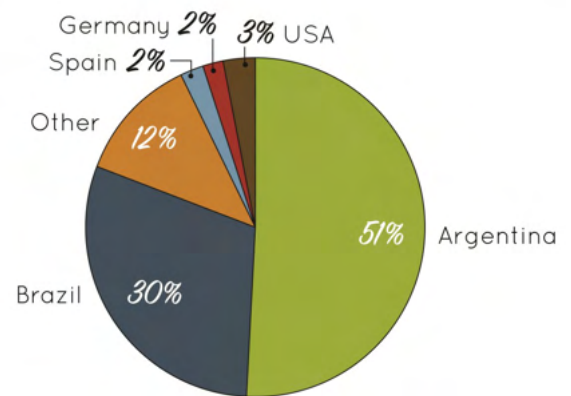


Total contribution of Travel & Tourism to GDP in 2014.



Total contribution of Travel & Tourism to employment in 2014.

Paraguay Tourist Arrivals, 2012



Paraguay Bird Snapshot





### Profile of a U.S. Birder in Paraguay

- Highly educated
- Higher annual income
- Middle-aged and elderly
- Equally men and women
- Usually travel solo or with a partner, rather than in large groups
- Many are members of local bird clubs
- Two-thirds travel with bird tour company
- Seeking threatened & regionally endemic species
- Looking for "off the beaten path" experiences

The best time for birdwatching is August through November, although birding can be done year round.<sup>13</sup> Birders who stay around 20 days could see close to 400 species. Two-thirds of birders travel with tour companies and one-third use local travel agents.<sup>14</sup> Most birdwatchers come to see ecoregion endemics and threatened species; some combine bird watching with other ecotourism and cultural activities.

### The Threats

Many species can be dependent on a single ecoregion.<sup>11</sup> In Paraguay, 146 species are in categories showing they are under threat.<sup>10</sup> According to IUCN's Red List, "between 2005 and 2011 there was a steady and continuous deterioration in the status of birds in Paraguay."<sup>12</sup> In addition, Paraguay's bird population is threatened by development, deforestation, and climate change, among other factors. **BirdLife International predicts that unless immediate conservation actions are taken, "in the near future only 88% of Paraguay's bird species will survive."**<sup>18</sup>

Bird-based tourism can generate revenue and thus be an incentive to conserve natural habitats and species.

### The Future

Although Paraguay's current birding market, especially for US birders, is small, perhaps due to basic infrastructure or lack of information, it is one of South America's most affordable destinations and access to the country is improving. Paraguay's competition for the bird tourism market among first time visitors to South America includes Argentina, Brazil, and Colombia. Paul Smith of Fauna Paraguay writes, "Only in the last 20 years are we beginning to realize just how special this country is and today it is one of the most exciting places to study wildlife in South America." But Smith adds, **Paraguay's bird market needs "more visibility" and better marketing.**<sup>19</sup> **Paraguay should position itself to tap into the U.S. birding market, whose overnight, week-long (or more) visitors will provide more tourism revenue per capita.**

### Endnotes

<sup>1</sup> "Wildlife in Paraguay" (2015). Fauna Paraguay. <http://www.faunaparaguay.com/wildlife.html>.  
<sup>2</sup> WTTC (2014). *Travel & Tourism Economic Impacts 2014: Paraguay*. <http://www.wttc.org/-/media/files/reports/economic%20impact%20research/country%20reports/paraguay2014.pdf>  
<sup>3</sup> World Bank. International tourism arrivals, number of arrivals. <http://data.worldbank.org/indicator/ST.INT.ARVL>.  
<sup>4</sup> SENATUR Paraguay. Department of Statistics and Market Research. (2014). Statistical report of inbound tourism 2014. [http://www.senatur.gov.py/images/stories/pdf/Estadisticas/marzo2015/Informe\\_Estadistico\\_de\\_Turismo\\_Receptivo\\_2014.pdf](http://www.senatur.gov.py/images/stories/pdf/Estadisticas/marzo2015/Informe_Estadistico_de_Turismo_Receptivo_2014.pdf).  
<sup>5</sup> "Cálculo de los ingresos por Turismo Receptivo de Enero a Diciembre 2014" (2015). Statistics of SENATUR-Paraguay. [http://www.senatur.gov.py/images/stories/pdf/Estadisticas/marzo2015/Informe\\_Estadistico\\_de\\_Turismo\\_Receptivo\\_2014.pdf](http://www.senatur.gov.py/images/stories/pdf/Estadisticas/marzo2015/Informe_Estadistico_de_Turismo_Receptivo_2014.pdf).  
<sup>6</sup> SENATUR Paraguay. Presidente de la Republica (2015). "Avistaje de Aves." [http://www.senatur.gov.py/index.php?option=com\\_content&view=article&id=59&Itemid=245](http://www.senatur.gov.py/index.php?option=com_content&view=article&id=59&Itemid=245).  
<sup>7</sup> FITUR (2014). *Nature-Based Tourism: More Prominent than ever at FITUR 2014*. [http://www.ifema.es/Institucional\\_01/noticias/NoticiasdeFerias/ferial/INS\\_031709](http://www.ifema.es/Institucional_01/noticias/NoticiasdeFerias/ferial/INS_031709)  
<sup>8</sup> Jose L. Cartes & Rob P. Clay (2009). "Important Bird Areas Americas: Paraguay." Bird Life International.  
<sup>9</sup> L. Lopez (2011). *State of Paraguay's Birds: Indicators of Changing Times*. Guyra Paraguay & BirdLife International. Asuncion, Paraguay. [http://www.birdlife.org/datazone/userfiles/file/sowb/pubs/Paraguay\\_en.pdf](http://www.birdlife.org/datazone/userfiles/file/sowb/pubs/Paraguay_en.pdf)  
<sup>10</sup> Where to Watch Birds and Other Wildlife in the World (April 2015). *Destinations A-Z: Para-*

## Important Bird and Biodiversity Areas in Paraguay



*guay*. <http://www.wheretowatchbirdsandotherwildlifeintheworld.co.uk/ourtop50destinations.html>

<sup>11</sup> Guyra Paraguay (2012). *State of Paraguay's Birds*. [http://www.birdlife.org/datazone/userfiles/file/sowb/pubs/Paraguay\\_en.pdf](http://www.birdlife.org/datazone/userfiles/file/sowb/pubs/Paraguay_en.pdf)

<sup>12</sup> L. Lopez (2011). *State of Paraguay's Birds: Indicators of Changing Times*. Guyra Paraguay & BirdLife International. Asuncion, Paraguay. [http://www.birdlife.org/datazone/userfiles/file/sowb/pubs/Paraguay\\_en.pdf](http://www.birdlife.org/datazone/userfiles/file/sowb/pubs/Paraguay_en.pdf)

<sup>13</sup> Where to Watch Birds and Other Wildlife in the World (April 2015). *Destinations A-Z: Paraguay*. <http://www.wheretowatchbirdsandotherwildlifeintheworld.co.uk/ourtop50destinations.html>

<sup>14</sup> Trip reports for Paraguay (2013). Cloudbirders. <http://www.cloudbirders.com/tripreport/statistics/area>

<sup>15</sup> Guyra Paraguay (2012). *State of Paraguay's Birds*. [http://www.birdlife.org/datazone/userfiles/file/sowb/pubs/Paraguay\\_en.pdf](http://www.birdlife.org/datazone/userfiles/file/sowb/pubs/Paraguay_en.pdf)

<sup>16</sup> Email surveys and interviews with Nathalia Aguilar Avalos, Guyra Paraguay; Alberto Esquivel, Wildlife Paraguay; Paul Smith, Fauna Paraguay; and Oscar Rodriguez, DTP Paraguay, April – May 2015

<sup>17</sup> Fauna Paraguay. *Fauna Paraguay Eco-Tours*. <http://www.faunaparaguay.com/ecotours.html>

<sup>18</sup> Lopez, L. (2011). *State of Paraguay's Birds: Indicators of Changing Times*. Guyra Paraguay & BirdLife International. Asuncion, Paraguay. [http://www.birdlife.org/datazone/userfiles/file/sowb/pubs/Paraguay\\_en.pdf](http://www.birdlife.org/datazone/userfiles/file/sowb/pubs/Paraguay_en.pdf)

<sup>19</sup> Interview with Paul Smith, Fauna Paraguay and "Wildlife in Paraguay" (2015). Fauna Paraguay. <http://www.faunaparaguay.com/wildlife.html>.

