



*Maloti Drakensberg Transfrontier
Project– Birding Route
(Lesotho)
Feasibility Study and Development Plan
Executive Summary*

*Prepared By BirdLife South Africa
For The Maloti Drakensberg Transfrontier Project (Lesotho)*



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Executive Summary

BirdLife South Africa was contracted in October 2006 to compile a development plan for a "Birding Route" through the Lesotho component of the MDTP as well as provide training for local bird guides and undertake baseline marketing activities to raise the profile of the area within the avitourist market.

The aims of this report will be to examine how a potential 'Maloti - Drakensberg Birding Route', could become a viable sustainable ecotourism option for the area, through the establishment of a support structure that would facilitate training and mentoring of local bird guides, marketing of the area, address avitourism specific infrastructural needs and deliver tangible conservation and socio-economic benefits within the context of a network of birding sites, accommodation resources and community-based environmental education activities.

Birding Routes grow on the "tourism route" and concept comprise four basic pillars, these being Sites, Information and Resources, Accommodation and Guides.

Lesotho boasts 6 Important Bird Areas (IBA's) 5 of which fall within the boundaries of the MDTP. These include¹

- L001 Liqobong
- L002 Upper Senqu River
- L003 Mafika Lisiu / Bokong
- L004 Sehonghong and Matabeng
- L005 Sehlabathebe National Park

Of these only 2 are accessible by tar road and the balance are either inaccessible or only accessible to 4x4 vehicles. Additional well known sites include Sani Pass / Sani Top which is recommended in "Where to watch birds in Southern Africa"²

Resources for avitourists wanting to visit Lesotho are virtually nil. There are no bird lists available at any sites, no websites dedicated to birding, no brochures highlighting birding opportunities or information over and above the odd mention of a particular rare species on awareness / educational materials at some reserve receptions. This is a critical constraint. Communications with the birding fraternity cited "a contact point with up to date information and someone to "advise" as something that would make a positive difference to their birding trips, this facility does not exist in Lesotho in any form and needs to be developed.

Lesotho does not have a high variety of species, only 275 species occur in Lesotho compared to other neighboring areas such as Zululand which has over 600 species. **However, Lesotho does have a very high variety of Southern African endemic species and a high variety of very sought after / rare species** - some of these include:

- Bearded Vulture *Gypaetus barbatus*
- Orange-Breasted (Drakensberg) Rockjumper *Chaetops aurantius*
- Drakensberg Siskin *Pseudochloroptila symonsi*
- Mountain Pipit *Anthus hoeschi*
- Bald Ibis *Geronticus calvus*
- Ground Woodpecker *Geocolaptes olivaceus*
- Cape Vulture *Gyps coprotheres*
- Black Eagle *Aquila verreauxii*

¹ Banes K, ed, 1998

² Chittenden H

Current demand for avitourism in the Lesotho component of the MDTP was calculated through various market surveys and stakeholder interviews. A survey undertaken using birding focused email forums and product owner interviews shows the current expenditure on avitourism activities to be R411 934 per annum. Using the multiplier of 0.3 brings the total current value of avitourism in the MDTP to R1 337 994 per annum.

Calculations into the **potential demand for avitourism**, assuming a birding route and related services were in place and readily available was calculated at R 5 624 328. per annum. Using the multiplier of 0.3, this means that the total potential value of avitourism in the MDTP amounts to R7 311 626 per annum. This represents a significant potential increase in revenue from avitourism were a birding route in place over the coming years.

Although the potential demand of avitourism in the MDTP is currently substantially lower than the more established birding routes in South Africa, the market surveys demonstrate that much higher levels of economic gain can be maintained if avitourism is developed and managed professionally and appropriately.

At present a Maloti Drakensberg Birding Route confined within the boundaries of Lesotho would have a challenge in terms convincing avitourists to drive through the entire route, the primary reason for this is the fact that there is little differentiation between the key birding sites identified – i.e. all sites throughout Lesotho offer a very similar package of species. Birders will want to see species such as Orange-breasted Rockjumper (Drakensberg Rockjumper) and Bearded Vulture BUT would not want to drive through the country from site to site and see the same species repeatedly. For this reason it is recommended that the proposed Maloti Drakensberg Birding Route through Lesotho focuses on harnessing the supply chains from neighbouring areas in South Africa³.

The Lesotho section of the Maloti Drakensberg Birding Route consists of a maximum of 8 self standing birding sites. This is not a very robust “route” product, exacerbated by the fact that most sites share common bird species / birding activities. A positive option would be combining the route with the South Africa section of the Maloti Drakensberg Transfrontier Park to create a fully integrated Maloti Drakensberg Transfrontier Park Birding Route.

Birders visiting the MDTP would access the area via three main points

- Caledon’s Poort (see map 2)
- Sani Pass (see map 3)
- Qacha’s Nek (see map 4)

The important aspect to take into account is that the access points would likely feed specific sites rather than the “route” as a whole. ***Harnessing the supply chain from South Africa into specific sites from specific access points would be the most advantageous way forward in terms of generating economic opportunities for local bird guides.***

Marketing is the single biggest need for developing tourism effectively in the MDTP area marketing efforts should focus on the competitive advantages of the region which include:

- High number of rare, endangered and highly localised species
- Build on the brand value of the Maloti Drakensberg Transfrontier Park
- Sense of place / wilderness without the crowds
- Adventurous, unique experience not available elsewhere
- Flagship species such as Bearded Vulture

³ This has also been highlighted in Lesotho’s Draft Strategic Framework

Four primary avitourism markets have been identified, all of which offer varying levels of potential for benefiting the MDTP

- Specialist Tour Operators
- Local Birders and General Naturalist Market
- International “Twitcher” Market
- South African “Twitcher” market

The “twitcher”⁴ market is and would potentially be the MDTP’s largest market segment. The entire MDTP area holds species that are highly restricted in their range or generally considered very rare, which this group specifically targets.

The feasibility study found that the area could sustainably support up to a maximum of 10 guides⁵ – this is however dependent on a well established support structure (birding route) Guides operating in some areas are more likely to be self sustaining than in other areas, this would also be highly dependent on marketing and support received via the Birding Route. These freelance guides should be based around the following areas⁶

- Bokong Nature Reserve – 2 Bird Guides
- Ts’ehlanyane National Park – 1 bird / nature guide
- Mokhotlong – 1 bird / nature guide
- Sani Top – 2 Bird Guides
- Sehlabathebe National Park – 1 Bird Guide
- 3 guides who can be roaming / accompany birders from an access point to several sites on an itinerary

Ensuring the correct human resources are available on the ground dedicated to implementing the project is the most essential success factor.

A dedicated project manager / coordinator would be needed as a contact point for information, liaising with BirdLife Travel, mentoring guides, developing infrastructure projects and managing marketing efforts. This person would ideally also be responsible for rolling out a longer term vision of combining the Lesotho and South Africa components of the MDTP.

The short term need for marketing and support could be sub contracted to a neighbouring Birding Route, such as the Southern KZN Birding Route which has the structures and human resources in place to support avitourism in Lesotho. This would make the entire process significantly more cost effective due to economies of scale for sharing marketing costs to attend shows, communications etc.....consideration must be given to and agreements put in place to ensure the Lesotho / MDTP brand integrity is not compromised if this option is undertaken

Two budget options have been laid out, a shared costs option where an established neighbouring birding Route could undertake the marketing and support services for the MDTP Birding Route at a cost of approximately R1 183400 over a three year period (recommended for short term). A longer term integrated birding route which would operate as a self standing project would carry a development cost of approximately R3 254631 over 6 years. The income forecasts for this scenario show the project to be self sustaining by year 5.

The development of avitourism and a birding route in the MDTP clearly has tremendous potential as shown by the values in the market research report. It is critical that adequate resources and funding are secured to ensure that the long term support that is required to achieve success and

⁴ Twitchers are birders who seek out new species to add to their “list” of birds seen

⁵With a bias to the 2 identified high potential sites and based on income expectations in the range of ZAR 12 000 / annum

⁶ These sites are based on short term need and high potential for immediate business

sustainability. A key finding of the market surveys has been that general ecotourists and specifically South African-based companies that lead tours for general ecotourists into Lesotho represent a major source of potential for the infrastructure and services of a birding route. It is critical that strategies be put into place to ensure that this demand can be harnessed effectively as the MDTP Birding Route develops.

Integrating the Lesotho component of the MDTP into a wider fully integrated birding route has potential to create one of the most exciting avitourism products in Southern Africa.

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