Re-establishment of annual movement trends for a reintroduced long-lived avian species

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## 0.1 Abstract

## 0.2 Introduction

### 0.2.1 Biological intro to migration in long-lived avian species

Migration is a common behavioral mechanism widely used by all major vertebrate groups (e.g. birds, fish, mammal, herpetofauna) that allows individuals to optimize seasonal availability of resources, thereby increasing long-term fitness ([Fryxell et al. 1988](#ref-fryxell1988), [Milner-Gulland et al. 2011](#ref-milner-gulland2011), [Barker et al. 2022](#ref-barker2022)). Despite its prevalence as an ecological process and a large amount of research studies involving migration, the establishment of population-level migratory traditions is not well understood ([Abrahms et al. 2021](#ref-abrahms2021b)). Reasons for this discrepancy include the challenges of making population-level inference from observations of individuals, quantifying migratory movements along a continuum of variability, and the relative scarcity of successful reintroductions of formerly endangered migratory species ([Mueller et al. 2011](#ref-mueller2011a), [Senner et al. 2020](#ref-senner2020a)).

Similar to other large, long-lived avian species such as geese, cranes and storks, adult swans take care of their young for the first year of life, providing food, protections, and guiding them on their first migration cycle ([Chernetsov et al. 2004](#ref-chernetsov2004a), [Mueller et al. 2013](#ref-mueller2013a)). As a consequence, cultural transmission during the first year is thought to be the primary mechanism that dictates the learned migration patterns used in subsequent years ([Sutherland 1998](#ref-sutherland1998)).

Although this transfer of information is an effective mechanism for preserving migratory patterns through generations, it is unclear how these trends become established when a formerly extirpated population has been reintroduced on a landscape. Jesmer et al. ([2018](#ref-jesmer2018)) found that newly translocated populations initially lost their migratory tendencies and that it took many generations to re-establish such patterns.

### 0.2.2 History of IP TRUS decline in NA

Trumpeter swans (*Cygnus buccinator*), the largest waterfowl species in North America, were widespread throughout the continent prior to European colonization during the century ([Alison 1975](#ref-alison1975)). Due to widespread hunting for meat, skins for powder puffs, and feather quills for writing, trumpeter swans were nearly extirpated in the lower 48 states and reached an estimated low of 70 individuals in the 1930s ([Banko 1960](#ref-banko1960)). Critically low numbers of trumpeter swans led to the establishment of Red Rock Lakes National Wildlife Refuge (RRLNWR) in the confluence of Montana, Wyoming, and Idaho in 1935, which was the last vestige of a sizable breeding swan population in the lower 48 states ([Shea et al. 2002](#ref-shea2002)).

### 0.2.3 History of IP TRUS comeback in NA

As trumpeter swan numbers at RRLNWR started to rise, this flock was used as a source population for reintroduction efforts in other parts of the historical breeding range. Many states translocated trumpeter swans from RRLNWR to augment and boost the abundance and distribution of the diminished Rocky Mountain Population (RMP) or to restore the Interior Population (IP), which had been completely extirpated ([Shea et al. 2002](#ref-shea2002)). As reintroduction programs further expanded, demand for trumpeter swans outpaced the number available at RRLNWR, and forced managers to search for an alternative source. In 1959, initial aerial surveys in Alaska discovered over a thousand Pacific Coast Population (PCP) swans ([Hansen et al. 1971](#ref-hansen1971)). Additional surveys in 1968 tallied 2,848 swans, confirming that the population was growing, and that there were sufficient abundance to provide swans for translocations, including to states conducting reintroduction efforts within the IP ([Matteson et al. 1988](#ref-matteson1988)). An important distinction between these source populations is that PCP swans breeding in Alaska migrate to British Columbia and the northwestern United States each winter, but RMP swans from the Tri-State area have lost their migratory tradition ([Baskin 1993](#ref-baskin1993), [Oyler-McCance et al. 2007](#ref-oyler-mccance2007)).

### 0.2.4 Current IP conditions

Estimates of IP abundance have increased dramatically since reintroductions began in the 1960s, and both population size and distribution has expanded significantly ([Groves 2017](#ref-groves2017)). Trumpeter swans currently breed throughout most of the western Great Lakes region, including in Minnesota, Wisconsin, Michigan, Iowa, Manitoba, Ontario, and Ohio. However, beyond estimates of population size and trends, there is relatively little recent information about their ecology, including seasonal movements and migration patterns, therefore hindering conservation decision-making. Current knowledge gaps include the proportion of the IP that remains resident on their breeding range during the winter, the extent (i.e. distance) of movement for those swans that do leave their territories, the timing of the migratory periods (onset in the fall, settlement during winter, arrival in the spring), and how much intra- and inter-individual variability there is in the population.

### 0.2.5 Drivers/Why to migrate (or not)

Many factors may influence the decision to leave the breeding territory during the non-breeding season, and how far to migrate for those that leave, and why there may be high among-individual variability even for those breeding at similar locations, including energetics of flight, life history requirements, and knowledge transfer of migratory traditions Chapman et al. ([2011](#ref-chapman2011)). The energetic cost of migration for a given distance traveled increases non-linearly with the overall weight of the bird, and therefore swans, one of the heaviest avian species to migrate, do so at considerable expense ([Pennycuick 1989](#ref-pennycuick1989), [Berthold 2001](#ref-berthold2001), [Newton 2010](#ref-newton2010)). Conversely, according to the ‘Thermal Tolerance’ or ‘Body Size’ hypothesis, greater body mass conveys both a higher basal metabolic rate ability to fast, therefore better withstanding harsh winter conditions, and the tendency to migration should decrease with increasing body size ([Ketterson and Nolan Jr. 1976](#ref-ketterson1976), [Fudickar et al. 2013](#ref-fudickar2013)). Additionally, due to the novelty of persisting in relatively unfamiliar landscapes and the high energetic demand of migration, the non-breeding period typically has the lowest survival rates throughout the annual cycle ([Sillett and Holmes 2002](#ref-sillett2002), [Rushing et al. 2017](#ref-rushing2017)). Alternatively, migrating to a more temperate area during the wintering period can provide access to food and other resources that allow trumpeter swans to avoid the harshness of winter in the breeding territory ([Somveille et al. 2015](#ref-somveille2015)).

Differences in migratory habits may also be due to breeding status, which conveys unique life history requirements, such as early arrival in the spring to defend a breeding territory, lay and incubate eggs, and to stay on the territory late enough in the fall that cygnets learn to fly and develop sufficient fat reserves to migrate south for the winter; all requirements that non-breeding swans will not experience.

It is also likely that the drivers of migration vary within the IP based the location of a swan’s breeding territory. Cues for migration can include declines in available food resources, which may also be affected by density-dependent intra-specific competition ([Rappole 2013](#ref-rappole2013)). Swans that spend the summer at different latitudes will experience varying environmental conditions, such as timing of vegetative greenness or the freeze-up of water on shallow wetlands, which blocks access to submerged vegetation. The ‘push’ to avoid the harsh elements of winter will vary substantially throughout different portions of the IP breeding range, and we’d expect the consequences on movement trends to vary concurrently.

### 0.2.6 Objectives

To address current information needs, we marked a sample of IP swans with GPS-GSM transmitters to evaluate their movement throughout the annual cycle. Specifically, we will quantify 1) the proportion of IP that is migratory and the extent of those movements, 2) migration phenology, 3) the role of breeding status and breeding location on annual movement patterns, and 4) the degree of individual and population variability in migration patterns. Ours is primarily a descriptive study of how a re-established population of trumpeter swans uses a novel landscape.

## 0.3 Methods

### 0.3.1 Study Area

Our study area for swan captures is approximately the current breeding and wintering distribution of IP trumpeter swans (Groves 2017). We captured all swans on their breeding range except for 4 swans captured on their wintering grounds in Arkansas (Fig. 1) . We deployed transmitters on IP trumpeter swans as far north and west as southern Manitoba (51.1° N, 99.7° W), as far south as central Arkansas (35.5° N, 91.9° W), and as far east as central Ohio (40.6° N, 82.7° W). Capture locations occurred in a mix of Laurentian Mixed Forest, Prairie Parkland, Eastern Broadleaf Forest, and Aspen Parklands ([Cleland et al. 1997](#ref-cleland1997)).

Figure 1: Insert caption for capture location map here…

Figure 1: Insert caption for capture location map here…

### 0.3.2 Capture and Handling

We captured all swans (except for 4 captured using snares during the winter) during the definitive prebasic molt period when adult swans replace remiges, and are therefore flightless, using a combination of jon boats, airboats, step deck transom boats, square-stern canoes, and kayaks. We primarily used long-tail mud motors (Powell Performance Fab, Hutchinson, Minnesota, USA) to navigate shallow wetlands where swans were located although some swans were captured using surface-drive motors (Gator-Tail, Loreauville, Louisiana, USA). We hand-captured swans using a shepherd’s crook pole ([Eltringham 1978](#ref-eltringham1978), [Hindman et al. 2016](#ref-hindman2016)). We predominantly targeted adult swans, which have higher survival rates than juveniles, to maximize the longevity of telemetry data collection ([Lockman 1990](#ref-lockman1990)).

We marked swans with two types of neck collars; 55-g neck collars with GPS-GSM transmitters incorporated into the collar housing (Model OrniTrack-N62 3G, Ornitela, Vilnius, Lithuania) and 140-g GPS transmitters (Model CTT-ES400, Cellular Tracking Technologies, [CTT], Rio Grande, New Jersey, USA) that were adhered to 64-mm neck collars (Haggie Engraving, Crumpton, Maryland, USA). Both types of neck collars contained a unique alpha-numeric code for visual identification. Swans captured in Michigan were fit with CTT collars and all other swans in the study were fit with Ornitela collars. All transmitters were programmed to collect GPS locations at 15-min intervals throughout the 24-hr daily period. We leg-banded each swan with a U.S. Geological Survey butt-end aluminum band.

Protocols for capturing and marking trumpeter swans in U.S. states were approved by the University of Minnesota Animal Care and Use Committee (protocol no. 1905-37072A), the Minnesota Department of Natural Resources (Special Permit no. 19017), the Michigan Department of Natural Resources (Threatened and Endangered Species Permit TE 175), the U.S. Fish and Wildlife Service (Research & Monitoring Special Use Permit no. K-10-001), and the U.S. Geological Survey Bird Banding Laboratory (Federal Bird Banding Permit no. 21631). All capture and marking of trumpeter swans in Manitoba was conducted under Federal Scientific Permit to Capture and Band Migratory Birds (no. 10271), Federal Animal Care Committee approval (project 20FB02), Provincial Species at Risk Permit (no. SAR20012), and Provincial Park Permit (no. PP-PHQ-20-016).**Need permit info from WI, IA, AR, and OH?**

### 0.3.3 Migration Phenology Classification

To quantify migration phenology throughout the annual cycle, we first calculated yearly time-series of Net-Squared Displacement (NSD) values for each swan, using July 1 as a cutoff date between years for individuals with multiple years of GPS data, and then condensed the dataset to a single average NSD value per day. After excluding swan-year datasets with less than 30 days of data, we iteratively fit a series of 7 intercept-only piecewise regression models to each time-series ([Wolfson et al. 2022](#ref-wolfson2022)). The syntax of each model corresponded to an increasing number of intercepts included (1-7) for average NSD values throughout the time series separated by breakpoints in time where the intercept values transitioned, therefore intercepts represent stationary segments in time corresponding to periods of the annual cycle, and breakpoints are the transitions between these segments. We fit all piecewise regression models in JAGS ([Plummer 2003](#ref-plummer2003)) using the mcp package ([Lindeløv 2020](#ref-lindelov2020)) in Program R version 4.0.2 ([Team 2022](#ref-rcoredevelopmentteam2022)), using 15,000 iterations and a burn-in period of 10,000. We ran all scripts in parallel using the future package on a partition of the Minnesota Supercomputing Institute (MSI) with 48 cores and 50GB RAM per core ([Bengtsson 2021](#ref-bengtsson2021)). We evaluated MCMC chain convergence via the Gelman-Rubin convergence diagnostic and excluded any model containing a parameter with a value of >1.1 from further analyses ([Brooks and Gelman 1998](#ref-brooks1998)). If all parameters in a model passed the threshold, we evaluated model fit and predictive performance using leave-one-out cross-validation (LOO-CV) with Pareto smoothed importance sampling to estimate the Expected Log Predictive Density (ELPD), using the loo package ([Gelman et al. 2014](#ref-gelman2014), [Vehtari et al. 2017](#ref-vehtari2017)). The ELPD values reflect the ability of the model to predict the posterior density of withheld data. We used LOO-CV to choose the ideal number of breakpoints (and thereby segments that correspond to migratory periods) for each swan-year dataset by selecting the model with the best ELPD value.

We qualitatively inspected the visual fit of each model chosen by ELPD for each swan-year dataset and removed 11 (out of 241 total datasets) that were obvious poor fits such that information from the breakpoints and intercepts would not be able to describe the annual migration phenology (link to Supplemental Materials). For models that passed visual inspection (230 out of 241), we extracted parameter values to represent the movement metrics of interest **(reference all of these metrics in a table?)** after first applying a series of criteria thresholds to strengthen the biological connection of the breakpoints and intercept values from the fitted models. **(include these in the supplemental as well?)**.

### 0.3.4 Summary of Migratory Trends

We devised a flexible workflow that could accommodate a wide breadth of variability in annual movements (because we’re fitting to individual years of data from each swan instead of a bigger pooled dataset) but still allow for population-level inference. For all swan-year datasets that had >30 points and had the best-fitting model pass visual inspection for **biological relevance**, we derived a number of movement metrics to describe annual movement trends by creating an algorithm to exclude erroneous segments and changepoints that didn’t represent biologically meaningful transitions between different segments of the annual movement cycle. (link to Supp Materials for rulesets)

**Include all the summary parameters in a table?**

**Include a supplemental file that shows the thresholds for each rule in the script that pulls out the movement summary information. In the main text, briefly allude to the ruleset without laying everything out in a lot of detail?**

## 0.4 Results

### 0.4.1 Capture/deployment/data stuff

We deployed 113 collars with GPS-GSM transmitters on 126 trumpeter swans (including 13 redeployments using collars recovered from mortalities). Of these, 78 were female and 48 were male; 73 were breeding adults (cygnets present), 22 were adults with mates present but not cygnets at time of capture, 24 were non-breeding adults captured while in large groups, and 6 were cygnets at the time of capture.

We collected 252 unique ‘swan-year’ telemetry datasets. We excluded 19 datasets due to insufficient temporal data coverage and 11 datasets due to a lack of piecewise regression model convergence.

### 0.4.2 Main text of results

Proportion of IP that is migratory, and the extent of migratory distance:  
Annual movements of IP trumpeter swans were highly variable. For swans that underwent long-distance migration (**add in x out of x went >xx km?**), there was a strong correlation between breeding/capture latitude (mostly between 43 and 53 degrees latitude) and the extent of migration during the non-breeding season (Fig. 3). However, many swans with breeding/capture sites between 40 and 48 degrees latitude showed minimal movement during the non-breeding season and can be considered resident or exhibiting short-distance regional movements.

Migration phenology, relationships to breeding and latitude, and variability:  
Dates of departure from breeding territories in the fall by long-distance migrants (>100km) were variable, with the overall average departure date across years on November 1st with a standard deviation of 20 days (Table 1), and yearly averages ranged from October 26 to November 7 (Table 3). We found little to no evidence of a relationship between breeding latitude and date of fall departure (Fig. 4), but breeders and cygnets left later, on average, than non-breeders or paired swans, and non-breeders had much higher variability in timing than the other breeding categories (s.d.=30 for non-breeders and s.d.=10 for each other category) (Fig. 5, Table 5). The level of individual variability between years was **xxxxx**. **John, we should dig a little deeper into what you mentioned with Anne Hertel’s methods for quantifying individual variability that you mentioned if it’s relevant**

Swans arriving back on their territory in the spring had relatively low levels of individual variability within years, and arrival dates correlated highly with their breeding/capture latitude. There was also a much greater difference between breeding classes, with successful breeders arriving much earlier on average than non-breeders or paired swans. The level of individual variability between years was xxxxx.

Figure 2: Insert caption for data deployment figure here…

Figure 2: Insert caption for data deployment figure here…

**Include some/all of the figures for the most important summaries of annual movement. And also include a reference to the full table of all parameter output.**

1. the proportion of IP that is migratory and the extent of those movements

Figure 3: Insert caption for breedng lat vs mig extent figure here…

Figure 3: Insert caption for breedng lat vs mig extent figure here…

, 2) migration phenology, 3) the role of breeding status and breeding location on annual movement patterns

Figure 4: Insert caption for timing vs latitude status figure here…

Figure 4: Insert caption for timing vs latitude status figure here…

Figure 5: Insert caption for timing vs breeding status figure here…

Figure 5: Insert caption for timing vs breeding status figure here…

Figure 6: Insert caption for duration vs breeding status figure here…

Figure 6: Insert caption for duration vs breeding status figure here…

1. the degree of individual and population variability in migration patterns

### 0.4.3 Summary tables of migration phenology

Table 1: Migration phenology of fall departures by long-distance migrants

| **Number of Swans** | **Number of Swan-Years** | **Average Fall Departure** | **Standard Deviation (in days)** | **Earliest Departure** | **Latest Departure** |
| --- | --- | --- | --- | --- | --- |
| 64 | 91 | November 01 | 20 | September 01 | December 04 |

Table 2: Migration phenology of spring arrivals by long-distance migrants

| **Number of Swans** | **Number of Swan-Years** | **Average Spring Arrival** | **Standard Deviation (in days)** | **Earliest Arrival** | **Latest Arrival** |
| --- | --- | --- | --- | --- | --- |
| 42 | 63 | March 06 | 10 | February 06 | April 11 |

Table 3: Fall departures of long-distance migrants by year

| **Year** | **Number of Swans** | **Average Fall Departure** | **Standard Deviation (in days)** | **Earliest Departure** | **Latest Departure** |
| --- | --- | --- | --- | --- | --- |
| 2019 | 7 | October 31 | 7 | October 21 | November 08 |
| 2020 | 38 | October 26 | 20 | September 01 | November 24 |
| 2021 | 30 | November 06 | 20 | September 22 | December 04 |
| 2022 | 16 | November 07 | 10 | October 07 | November 16 |

Table 4: Spring arrivals of long-distance migrants by year

| **Year** | **Number of Swans** | **Average Spring Arrival** | **Standard Deviation (in days)** | **Earliest Arrival** | **Latest Arrival** |
| --- | --- | --- | --- | --- | --- |
| 2020 | 4 | March 02 | 20 | February 08 | March 23 |
| 2021 | 27 | March 05 | 7 | February 26 | March 23 |
| 2022 | 24 | March 07 | 20 | February 07 | April 11 |
| 2023 | 8 | March 06 | 20 | February 06 | April 08 |

Table 5: Fall departures of long-distance migrants by breeding status

| **Breeding Status** | **Number of Swans** | **Number of Swan-Years** | **Average Fall Departure** | **Standard Deviation (in days)** | **Earliest Departure** | **Latest Departure** |
| --- | --- | --- | --- | --- | --- | --- |
| breeder | 33 | 50 | November 05 | 10 | September 30 | December 04 |
| non\_breeder | 12 | 19 | October 24 | 30 | September 01 | November 24 |
| paired | 13 | 16 | October 28 | 10 | September 30 | November 20 |

Table 6: Spring arrivals of long-distance migrants by breeding status

| **breeding\_status** | **Number of Swans** | **Number of Swan-Years** | **Average Spring Arrival** | **Standard Deviation (in days)** | **Earliest Arrival** | **Latest Arrival** |
| --- | --- | --- | --- | --- | --- | --- |
| breeder | 29 | 45 | March 02 | 10 | February 06 | April 11 |
| non\_breeder | 6 | 8 | March 15 | 7 | March 05 | March 27 |
| paired | 7 | 10 | March 14 | 10 | March 01 | April 08 |

## 0.5 Discussion

### 0.5.1 Summarize main take-aways and the bigger relevance

1. the proportion of IP that is migratory and the extent of those movements,
2. migration phenology,
3. the role of breeding status and breeding location on annual movement patterns, and
4. the degree of individual and population variability in migration patterns.

### 0.5.2 More background on how migration is learned/passed along

Once established, the mechanisms that underlie transmission of migratory information between generations can be influenced both genetically and through social learning ([Åkesson and Helm 2020](#ref-akesson2020)). For some species with short lifespans (e.g. songbirds), migration is considered innate and primarily due to genetics based on observations of individuals that complete their first migrations independently without parents or other conspecifics to guide them ([Berthold 1991](#ref-berthold1991)). For many species with long generation times and high levels of parental care, migration behavior is considered to be primarily passed on through social learning, although the amount of time required for information transfer is not well understood across species ([**mueller2013?**](#ref-mueller2013)). Collective knowledge has been shown to accumulate over generations to drive migration patterns and improve efficiency in flocking species with socially learned migration behaviors, ([Sasaki and Biro 2017](#ref-sasaki2017)) although in reintroduced populations of Whooping Cranes (Grus americana) that were initially trained (i.e., learned) to migrate by following aircraft, migratory efficiency of flocks rapidly increased when older individuals were present ([**mueller2013?**](#ref-mueller2013)).

### 0.5.3 Broader significance of IP partial migration

Potential contributing reasons for partial migration: - Spectrum of environmental conditions along the latitudinal gradient of IP breeding range  
- Anthropogenic interferences (feeding, artificial open water) - Potential delays due to initiation of migration trends for the first time in reintroduced areas being limited by intergenerational transfer of knowledge? - Potential “lag effects” of genetic lineage from RMP vs PCP?

### 0.5.4 Migration Segmentation methods

What others have done: – Threshold-based (Rely on arbitrary choices, not generalizable to other species) - Date-based time threshold, distance-based spatial threshold, a combination of both – Model-based (objective, but may not be very accurate) - traditional NSD Bunnefeld curve-fitting approach (and the Spitz migrateR package with slightly more flexibility) – Hybrid approaches - Visual ID based on k-means clustering of distance and elevation ([Lowrey et al. 2020](#ref-lowrey2020), [Zuckerman et al. 2023](#ref-zuckerman2023))

How our methods are different from others:

Our attempt at semi-automated analyses; if there is no human component there is an inevitable level of bias, but this can be reduced with a minimalist human component such as visually inspecting model fits and kicking out obviously bad fits. By adopting a compromise between a purely automated and objective approach that may present more bias if asked to accommodate too much biological variability and a more Trying to consider migration as more of a continuum.

Net-Squared Displacement has been most commonly used to categorize migration by fitting a small number of non-linear theoretic movement models that represent traditional types of migration and choosing the movement model with the lowest AIC value ([Bunnefeld et al. 2011](#ref-bunnefeld2011), [Spitz et al. 2017](#ref-spitz2017)), a relatively straightforward approach, although some studies have shown that it often does not reliably identify migration at an individual level ([Cagnacci et al. 2016](#ref-cagnacci2016)).

Despite the prevalence of this approach, increasing evidence has been provided to suggest that the majority of migration doesn’t fit into these restrictive categories and that migration should instead be considered along a continuous behavioral gradient ([Ball et al. 2001](#ref-ball2001), [**dingle2007a?**](#ref-dingle2007a)). **Add comparison of our approach with (**[**van de Kerk et al. 2021**](#ref-vandekerk2021)**)**

## 0.6 Acknowledgements

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2. Michigan Department of Natural Resources [↑](#footnote-ref-21)
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5. Minnesota Department of Natural Resources [↑](#footnote-ref-24)
6. Ohio Department of Natural Resources [↑](#footnote-ref-25)
7. Iowa Department of Natural Resources [↑](#footnote-ref-26)
8. Wisconsin Department of Natural Resources [↑](#footnote-ref-27)
9. Wisconsin Department of Natural Resources [↑](#footnote-ref-28)
10. Cleveland Metroparks Zoo [↑](#footnote-ref-29)
11. Manitoba Wildlife and Fisheries Branch [↑](#footnote-ref-30)
12. Three Rivers Park District [↑](#footnote-ref-31)
13. Trumpeter Swan Society [↑](#footnote-ref-32)
14. Minnesota Department of Natural Resources [↑](#footnote-ref-33)
15. U.S. Geological Survey, Louisiana Cooperative Fish and Wildlife Research Unit [↑](#footnote-ref-34)
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18. U.S. Geological Survey, Minnesota Cooperative Fish and Wildlife Research Unit [↑](#footnote-ref-37)