THE EVOLUTION, STRUCTURE AND MARKET FOR BIRDING TOURISM IN SOUTH AFRICA

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Abstract

The aim of this study was to define the structure, size and evolution and growth of one of the contributing markets to recent tourism growth in South Africa, bird watching tourism. Regarded as one of the fastest growing niche ecotourism markets both internationally and in South Africa, this report traces the growth patterns and outlines the organisation and structure of the sub-sector in South Africa. The report also provides an estimate of the market's potential contribution to the tourism economy in South Africa.

The findings presented in this report are based on original interviews with 12 individuals in the birding, conservation and government sector. A wide variety of documentary sources including the 2009 Kaiser Associates report on Bird watching in South Africa and the recently published report on the South African birding watching tourism industry report by the Department of Trade and Industry have also informed the findings and content of this report. Again, findings on the demand and supply elements of birding in South Africa were analysed from 68 individually collected and an online based survey conducted amongst birders and specialised birding tour operators.

Amongst the major findings of the study is the fact the growth of birding tourism in South Africa is largely run by BirdLife South Africa through its 80 year old nationwide network of more than 50 community clubs or branches which mobilise and induct new birders and volunteers into bird watching. Most critical about the bird clubs are the several day, weekend

and bird monitoring events and outings that are organised by the each of the clubs. It has been shown that local birders attend approximately 31 birding events and outings and spend R1415 per annum per trip excluding spend on, birding services and equipment per annum. There are between 13000 to 24000 bird watchers in South Africa and that between 8000 and 16000 international birders visit South Africa per annum (the dti, 2010). Based on these numbers, this study has shown that birding tourism industry contributes between R 809 million to R 1.668 billion per annum to South Africa's Gross Domestic Product.

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ACRONYMS AND ABBREVIATIONS

ADU	–	Avian Demography Unit
ASA	–	American Birding Association
BLI	–	BirdLife International
BLSA	–	BirdLife South Africa
DEAT	–	National Department of Environmental Affairs and Tourism
EBA	_	Endemic Bird Areas
GDP	–	Gross Domestic Product
IBA	–	Important Bird Areas
PFIAO	–	Percy Fitzpatrick Institute of African Ornithology
NDT	–	National Department of Tourism
RBM	–	Richards Bay Minerals
RSPB	–	Royal Society for the Protection of Birds
SAT	–	South African Tourism
The dti	–	Department of Trade and Industry
THETA	–	Tourism, Hospitality, Sport Education and Training Authority
ZBR	–	Zululand Birding Route

GLOSSARY

Avitourism	A niche tourism market in which people undertake overnight travel outside their normal environment to watch birds in their natural habitats
Bird watching or birding	The observation and study of birds with a naked eye or through binoculars telescope for recreational reasons
Endemic birds	Bird species restricted to a particular geographic area
Important Bird Areas	Birding sites identified by BirdLife International as priority conservation sites for wild birds
Birding hotspot	An areas which supports or carries sought after bird species amongst birders, the area may have rare, endemic or a mega tick for many birders
Life list	A list of birds observed by a bird watcher over her lifetime
Ornithology	The formal and scientific study of birds and birding
Pelagic birds	Birds that inhabit the open sea and returning to the shore only to breed
Rarity	A bird species that is seldom recorded in a particular region
Twitcher	Birder who travels long distances to go and observe rare birds
Ticker	A birder whose primary aim in bird watching is to put a new species in his(her) life list
Vagrant	An individual species observed in a region outside its known range of occurrence.
Birding route	Is a tourism product which links and promotes various birding sites within a defined geographical area
Local Bird Guide	A trained person who is paid to help birders identify species at a particular site, region or combination of regions.
Field guide	Books and other publications designed to help a birder identify birds in the field or outdoors.
Birder Friendly Establishment	Accommodation facilities suitable for birders which are by recommended BirdLife South Africa

Chapter 1

Introduction and research methods

1.1 Introduction

Since South Africa's democratic transition in 1994, tourism has been one of the fastest growing economic sectors in the country's economy. South African Tourism' 2009 annual tourism report shows that since 1994, foreign arrivals in the country grew by over 100 percent and that tourism's contribution to the Gross Domestic Product (GDP) has by far surpassed that of gold, making tourism "the new gold of the country's economy" (SAT, 2009). 1n 2009, the South African tourism sector contributed over 8% to the GDP and employed close to 1 million people (SAT, 2009). In the same year, 9.7 million international tourists visited South Africa of which 75% were from Africa (SAT, 2009). The domestic tourism market also continued to show its importance to the local tourism economy. The market constituted 77% of all tourism volume in 2009 and its total contribution to GDP was 26% (SAT, 2009).

In addition, whilst tourists come to South Africa for varying purposes including cross- border shopping, Visiting Friends and Family (VFR), business and medical travel, the leisure market constitute the largest purpose for inbound travel (SAT, 2009). The leisure tourism segment includes the wildlife or eco-tourism market which on the international scale, has been regarded as one of the fastest growing tourism segments in the past three decades (Sheard, 1999; Mackoy & Osland 2004; Curtin & Wilkes, 2005). One of the ecotourism segments regarded as the largest generator of ecotourism income is bird watching. This segment consists of the largest group of educated and above average income earners (Ceballos-Lascurain, 1996; Cordell & Herbert, 2002). Cordell & Herbert (2002) argue that bird watching is the most rapidly or fastest growing segment of ecotourism or nature based tourism in the world.

The view that bird watching is one of the fastest growing sub sectors is validated by statistics, literature, local and international events and surveys available on the value of birding in various destinations across the world. In the United States of America (USA), a survey in 2001 revealed that 46 million people (one in five adults) watched birds that year and this activity generated US$ 85 billion in economic output (Boere, 2006) for that country. As a sign of the growth and increasing maturity of this market in the USA, the country has one of the world's foremost and biggest tour operators and travel agencies offering birding trips to almost all continents including Africa, Europe, Asia, Australasia, South America and domestic tours in the USA (www.fieldguides.com). Established in 1985, Field Guides offers birding tours worldwide and had 120 departures to over 100 destinations in 2008 (www.fieldguides.com).

In the United Kingdom, it is estimated that rural English countryside tourism (15% of which is birding tourism) contributes nearly €14 billion and supports 380 000 jobs a year (GFA RACE, 2004). England is also home to the Royal Society for the Protection of Birds, a 110 year old bird conservation movement which was established to stop trade in plumes for women's hats (www.rspb.org.uk). The society owns 200 nature reserves which support almost 80% of England's rarest and protected bird species (www.rspb.org.uk). The organisation has over 1 million members who provide a vast market for birding outings to its reserves and to destinations all over the world (www.rspb.org.uk). The UK and the US are, however, not the only countries where birding tourism has a footprint. International records provide evidence of birding tourism programs in many countries including the Philippines, Australia, Namibia, Peru, Guyana, Canada and Eritrea.

In South Africa, birding tourism has reached a level of growth that has attracted the policy makers at National Government level. As a result of the development of vibrant tourism routes and bird guide training programmes employment opportunities have been created for many young people over the past 10 years. In 2010 the Department of Trade and Industry's Customised Tourism Sector Programme commissioned a study on birding tourism. The study has shown that there are approximately 13000 to 24000 domestic birders and approximately 16000 international birders who both spend between R1, 205 billion and R2, 243 billion on birding trips, support services and equipment annually (the dti, 2010). The annual gross economic input is approximately 400% increment from the 1997 survey done by Turpie & Ryan (1998) which put the annual spend at between R80 million and R170 million. This growth represents the outcome of efforts put mainly by BirdLife South Africa in building the local birding tourism industry.

The genesis and growing popularity of the bird watching pastime and the parallel emergence and growth out of it, of the birding tourism industry into a worldwide and significant tourism sector in South Africa is at the centre of this study. The study seeks to trace the historical development of bird watching tourism and to identify the growth levers that stimulated it to its current size. Bird watching started as a pastime for the wealthy and well-educated and grew via awareness programmes, events, research breakthroughs, bird monitoring and surveys involving citizen scientists, birding publications like field guides, electronic birding forums and the emergence of environmental organisations (Drummond, 2009). As the pastime grew, private entrepreneurs identified a need to commercialise it by adding the tourism elements creating what is now called birding tourism or avitourism (Jones & Buckley, 2001). In tracing the evolution and growth of bird watching tourism (industrialization or commercialisation of bird watching), an analysis of the sector's local structure and current size will be undertaken as well as an in-depth analysis of the levers that contributed in the popularization and growth of the industry.

The aim of this research report is to trace the events and developments that contributed to the growth of the bird watching pastime and how this translated into the commercialisation or industrialisation of the bird watching into one of the fastest growing tourism sub- sectors, internationally and in South Africa in particular (Ceballos – Lascurain 1996; Cordell & Herbert 2002). The report will analyse the global and local circumstances and events that nurtured the growth of the pastime and unpack the current tourism structure and supply and demand elements of this growing eco-tourism sub-sector. In addition, the study will investigate the current share and contribution by the sector to the country's tourism economic output and the size of the market in the country's tourism economy.

1.2 Research Methods

The study was based on a combination of quantitative and qualitative research techniques. After the approval of the research proposal, the research process had three phases namely; design and development of interview questions and questionnaires, conducting of interviews and questionnaire circulation and lastly data collection, interpretation of results and report formulation.

In order to understand the supply side of birding tourism interviews were conducted with key birding tourism industry stakeholders. These included BirdLife South Africa's Avitourism management and staff, local bird guides, leaders of communities involved in avitourism projects, BirdLife Travel Manager, land based bird tour operators, South African Tourism's market research unit, eco-tourism development officials at the National Department Trade and Industry and selected branch chairpersons of BirdLife South Africa (BLSA). A total of 12 interviews were held between 2009 and 2010 with leading birding professionals and operators and the list is provided in appendix A.

For the birding tourism demand side analysis two questionnaires, one for birders (Appendix B) and the other for tour operators (Appendix C), were circulated via email to numerous local and international bird forums including The Big Bird Forum, Malaysia Bird Forum, SA Bird Club Forum, Simply Birding Forum, Birding Pal, Surfbirds Forum and the Bird Forum. Combined, these online birding forums have subscriptions of over 500 000 bird watchers worldwide. Printed questionnaires were also circulated and filled out by individuals at birding events. A total of 48 responses were received on the birder questionnaire and 35 were received from local and international tour operators.

Over the past ten years, birding tourism in South Africa has been marketed through the *Africa Birds and Birding magazine* (launched in 1996) which is widely read both locally and internationally. The magazine circulates over 10 000 copies and includes advertising space and feature stories for key birding tourism projects, birding tours and general birding knowledge articles. An analysis of the adverts and feature stories of *Africa Birds and Birding* as well as the BLSA newsletter (now a supplement of the magazine) was undertaken in order to identify birding areas that were promoted by the magazine and in order to trace the major events and the growth trajectory of the birding tourism industry in South Africa. Assessment of numerous birding internet sites was pursued in order to dissect the various offerings in the market and to identify the myriad forms of birding tourism and birding- related businesses.

Booking records of BirdLife Travel, a birding information and itinerary development agency within BLSA's avitourism division which started operating in 2004, were studied to determine growth trends, where people visit for birding, what birds are most wanted by clients, accommodation preferences, most preferred season, and number of people travelling per trip. The agency has organised itineraries for local and international birders. BirdLife Travel also promotes a Birder Friendly concept in which accommodation establishments and tour operators are assessed against a set criteria to gauge their suitability to host birders and the offered membership at a fee if found suitable. It has over 161 establishments countrywide signed up as members and a map of where these establishments are located has been developed in order to show the spatial layout between important birding areas and hotspots and the supporting accommodation infrastructure.

Lastly, the study will also draw from two recent reports on birding tourism in South Africa. The first is a research analysis report on 'Avitourism' in South Africa by Kaiser Associates, Anchor Environmental and ED/DE Tourism Solutions in November 2009 (Kaiser Associates et, al., 2009). The second is a comprehensive study on Avitourism which was published by the Department of Trade and Tourism in 2010 (the dti, 2010).

1.3 Overview of the research report

Premised by the introduction and research methodology discussed in this chapter, this report continues into four more chapters. Chapter two focuses on the historical development of bird watching pastime and how it translated into a thriving tourism industry. Literature review on the issue of definition of who a birder is and what the concept of avitourism is discussed. A variety of material on what motivates bird watchers is compared and contrasted in an effort to decipher the innate drivers of bird watchers. Drawing from a number of documentary sources, the chapter is concluded by discussing the international overview of the commercialisation of birding into a specialised and sustainable tourism industry.

In Chapter three as in the previous chapter, attention is then placed on the commercialisation of bird watching into a tourism industry in South Africa and the role played by conservation organisations such as BirdLife South Africa. In this chapter, the evolution of major birding events and their contribution to the birding culture is illustrated and discussed. Birding tourism supply elements are discussed including one of the fundamental pillars of the bird watching industry, the natural resources. Results from the 35 questionnaire drawn from tour operators are discussed.

Chapter four presents the research results drawn from the 48 questionnaires survey responses from birders and birding tour operators. The key focus is on the profile of the local birding tourism industry. The results in this chapter will also draw substantial comparisons with the results of the recently published birding report by the Department of Trade and Industry and the Kaiser Associates study.

The final Chapter provides concluding discussion and remarks on the study findings. It will provide a summary of all the previous chapters and briefly explain the main contribution made by the study to the field of bird watching tourism and existing literature and knowledge.

Chapter 2

International review of bird watching tourism

The aim in this chapter is to provide an international review of the development of bird watching and the commercialisation of the hobby into a growing tourism industry. The discussion begins by defining bird watching, provides some understanding for the motives behind people's interest and participation in the hobby, unpacking the various classes or categories available in the bird watching groupings, and traces the evolutionary events that propelled the growth of bird watching in Europe and the United States of America. A brief definition of the concept of bird watching and avitourism or birding tourism will be discussed as well.

2.1 Defining bird watching and avitourism

The international review of the birding tourism industry begins by clarifying the definition of the bird watching activity and the new concept of 'avitourism'. The discussion will provide answers to questions such as; who are bird watchers or who can be classified as a birder and who cannot or what activities constitute bird watching? The discussion on the definition of bird watching is extended by a further discussion on the variety of motivations that drive participation in bird watching at varying degrees of interest.

Overall, it is estimated that there are 10 000 wild bird species in the world (Jones, 1994). Of this total, 1104 are globally threatened, 16 extinct in the wild, the continued survival of 11 species is dependant on conservation efforts and the conservation status of 66 is not known because of insufficient scientific data on their distributions (Jones, 1994). The world wild bird species as shown above form the core natural resource base that underpins the popular global bird watching hobby and the growing commercial tourism around it. This situation particularly makes a thorough understanding of who a bird watcher is and the actual motivations that drive people towards it a compelling one.

Sekerlcioglu (2002) has defined bird watching as the act of identifying birds in their native habitats. Another definition is offered by the United States Fish FHWAR (2001) report which considers an individual who has either taken a mile long trip or more from home for the primary purpose of observing birds and/or closely observed or tried to identify birds around their home as a birder. According to the latter definition, people who watch birds from the comfort of their homes are legitimate garden bird watchers (FHWAR, 2001). The FHWAR (2001) study also made exclusions as to who is regarded as a bird watcher or and who is not. People who happen to notice birds while mowing the lawn or picnicking at the beach or those that take trips to zoos and observe captive birds are not regarded as bird watchers according to the FHWAR study.

In its analysis of the economic impact of bird watching in the USA, the FHWAR was able to categorise birders in their various levels of engagement (FHWAR, 2001). It indicated that of the 46 million birding population in the United States of America in 2001, 88 percent were garden birders and 18 million birders traveled away from home for birding purposes (FHWAR, 2001). Other activities that are undertaken by birdwatchers include half, full or multi-day tours, camping, guided tours, birding photography, bird walks, identification of birds, bird surveys and counts, bird ringing, biological species research and other related activities (Tourism Queensland, 2002). It could be conclusively articulated that there seems to be a consensus opinion amongst authors about who should be referred to as a bird watcher and the fact that birding entails the observation of birds in their natural habitats (Kaiser Associates et. al., 2009; the dti, 2010).

The United Nations World Tourism Organization defines a tourist as a person, who travels away from their normal place of residence for at least a 24 hour period and is willing to spend money for the trip (UNWTO, 2008). The UNWTO's (2008) definition of tourism therefore implies that a birder can only be regarded as tourist if he is willing to travel away from his normal place of residence to get to a location suitable for bird watching and spend money in the process. The new concept of avitourism takes from the definition of a tourist as it refers to travel outside one's usual environment with the sole purpose of watching birds in their natural environment (Kaiser Associates et. al., 2009; the dti, 2010). This does not include bird hunting travel, continues the dti report (the dti, 2010).

2.2 Categories of bird watchers

There are three different reasons qualifying Hottola's (2008) view that bird watchers are not a homogenous group of people but could be categorised along a continuum from casual to committed birders. The casual to committed continuum represents the range within which Decker et al (1987) argues that participants in the bird watching recreation grow based on their knowledge and experience. As a result, it could be assumed that it would be easier to satisfy a casual birder and increasingly difficult to satisfy a committed one depending on their level of commitment.

In a bird watching tourism market analysis undertaken by Tourism Queensland (2002), birders were classified into four market segments within the casual to committed range that Hottola (2008) alluded to. The first market segment is general birdwatchers – which are regarded as casual and low motivation birdwatchers that are equally interested in pursing other forms of nature tourism and travel in family groups (Tourism Queensland, 2002). Second are specialist birdwatchers with restricted budgets including moderately to highly motivated birders, young single or coupled travelling independently and are constrained by their activities by financial resources (Tourism Queensland, 2002).

The third category is specialist birders that are willing to pay in order to see more. These are time efficient birders who are less interested in non-birding activities, focussed on seeing more birds and have no budget constraints to do so. Finally, there is a calibre of birders that require packaged, efficient birding experiences under the guidance of professional and specialised guides (Tourism Queensland, 2002). This last category expects high standards of accommodation and travel comfort along with some personalised treatment (Tourism Queensland, 2002). Some of the activities that the birders across these categories embark on are, half day birding outings, full day birding tours, guided tours or camping tours, birding photographic tours, birding while hiking or bird walks, general identification of bird species (bird watching), customised tours bird monitoring and bird ringing (Turpie & Ryan, 1998; Tourism Queensland, 2002). It appears from the birder categories or classes discussed above, that something motivates or pushes birders to be interested in birding and whatever it is, it does not motivate or influence people at the same rate hence the various categories.

2.3 Motivations for bird watching

Besides defining who a birder or bird watcher is, another important question that is critical to ask is, are people driven by the same desire for bird watching and is this desire at the same level of intensity and how this phenomenon can be explained. Academic research on these questions indicates that there are psychological inclinations that lead people into birding. Both Sekerlcioglu (2002) and Hottola (2008) concur that bird watchers are people who observe birds in their natural environments.

Three reasons that explain why people choose to pursue the activity of bird watching have been identified by Decker & Cornelly (1989). The first is the affiliation-oriented grouping, where participants undertake bird watching to accompany a person in order to strengthen relationships (Decker & Cornelly, 1989). The second reason is the achievement-oriented motive (where involvement is aimed at meeting a standard performance) and lastly the appreciations-oriented motive participation in which the participant seeks a sense of peace, belonging, familiarity and stress reduction (Decker & Cornelly, 1989). The reasons include bird watching for the appreciation of bird's aesthetic appeal, for learning and study purposes, for the enjoyment and authenticity of experiences with wildlife and for competition amongst participants

Hottola (2008) provides some light on the various embedded motivations that encourage people to embark on this recreational activity. Again, Hottola (2008) further indicates that there are various reasons birders partake in bird watching. In his analysis of specialisations and motivations of birdwatchers, McFarlane (1994) introduced a psychological concept for understanding the motivations of bird watchers. He contends that there are typically several satisfactions or goals that are sought by participants in consumptive and non-consumptive recreational activities (McFarlane, 1994). As recreational activities are a mixture of consumptive and non- consumptive dimensions and fall within the continuum of the two depending on their nature, Applegate & Clarke (1987) conclude that bird watching is a consumptive sport because birders keep a 'life list' where an observed species is ticked once in a lifetime. On this basis Applegate & Clarke (1987) further argue that satisfaction ratings in bird watching is similar to hunting where a hunter is satisfied by putting a 'buck on the table' and for a birder a list of observed species in his birding life.

In their final analysis, Applegate & Clarke (1987) conclude that more experienced and competent (enthusiastic and fanatic) birders would report lower ratings of satisfaction than less competent (beginner or casual) birders. This is so because experienced birders plan their trip before they leave, they have a list of targeted species they want to see, prefer species richness and rarity than volumes and they know where to find the birds (Applegate & Clarke, 1987). Failure by fanatic birder to locate and observe species therefore leads to poor satisfaction levels and disappointment whereas a beginner birder will be happy to spot any available birds at a location regardless of their rarity, speciality and conventional sighting value due to a small life list and poor bird identification skills. This analysis is critical for the marketing strategy development for bird watching tourism companies from tour planning, operations, accommodation, guide services and itinerary development.

Another dimension to the debate on motivations for bird watching is offered by Decker et al (1987) who maintain that involvement in wildlife recreation is a dynamic process with the goal orientation changing with increased experience and specialisation. In this context, this assertion means that a participant in the activity of birding can be put in a particular category based on their original motive for participation and that the motive changes as they become more and more involved into the sport. In other words somebody might start birding as a way to affiliate with a certain grouping and through more birding knowledge and experience grow to a level where s(he) does it for appreciation and support for conservation due to improved knowledge and understanding of birds and conservation issues. Similarly, such persons would at the beginning of their birding activity be easy to please and would, according to Applegate & Clarke (1987)'s theory of specialisation and motivations for birdwatchers, grow increasingly difficult to satisfy in line with their increasing knowledge and experience of birds.

Having discussed some of the key birding concepts and terminology like bird watching and avitourism and the underlying drivers that push people towards the bird watching hobby, the study will now briefly trace and give a global perspective of the development and growth of bird watching across the world.

2.4 The rise of bird watching, a global perspective

The question of when bird watching or birding became formally considered as a pastime, a hobby or sport is difficult to determine. Lee (2009) suggests that there is no true date or event that marks the demoralization of birding as a sport. Indeed, Lee (2009) believes that the release of the first birding publication "The Bird Watcher's Digest'' played a major role in popularising birding in the United States of America. The event could be regarded as a launch pad for the bird watching industry. The assertion that the publication popularised birding is supported by the growth in numbers of the American Birding Association (sponsor and owner of publication). Membership of the association grew from 123 members in 1969, to 1972 members by 1974 (Lee, 2009). By 1992, the American Birding Association had 10200 members. At this time "Birding", the new name of the Bird Watchers Digest publication had expanded from being a 5 page newsletter to a 400 page reputable magazine with high resolution pictures, quality avian reports and was offering exciting birding news, events and articles (Lee, 2009).

Besides the existence of birding publications prior to the American "Birders Digest" of 1968, there is historical material that casts some light to the knowledge of birding during the

“Victorian Era” (1837 to 1901) via the collection of animal skins (Lee, 2009). All evidence of birding popularity, however, points to the period of the early 1900’s when bird watching as a hobby grew substantially. This was linked to the rise of environmental activism, the emergence of natural history print and television publications, the advancements in technology and transport which improved people’s mobility and the creation of birding events (Lee, 2009). In the United States, the first organised bird tours are said to have taken place in the late 1930’s when the National Audubon Society arranged trips to Florida and the first trans- Atlantic trip to Europe was organised in 1961 (Hvenegaard, 1995; Peterson, 1991). As stated earlier, the birth of the membership growth of the American Birding Association seems to have indeed played a key role in lobbying populations into bird watching, at least in the USA.

In the recent past, the American Birding Association led the popularisation of birding through advocacy, newsletter publication and awareness creation. In Mississippi, several annual birding festivals are hosted throughout the year including the annual Mississippi River Festival and the Hummingbird Festival (Lindsay, 2006). Both of these events had an attendance of 7970 people yielding a combined total annual economic impact estimated to be US$ 107, 685 in 2006 (Lindsay, 2006).

Besides attracting inward birding arrivals, the USA is identified by several studies as one of the major source markets for international birding arrivals (Kaiser Associates et. al., 2009; the dti, 2009). It is in the USA where the world’s leading specialised bird tour operator, Victor Emmanuel Nature Tours (Vent), was founded in 1975 (www.vent.com). This tour operator currently offers birding tours to over 120 destinations worldwide. Another tour operating company started in 1985 in the USA is Field Guides which offers birding tours to about 100 destinations worldwide (fieldguides.com).

In the United Kingdom (UK), the Royal Society for the Protection of Birds (RSPB), which was established in 1889, and now has over 1 million members (www.rspb.org.uk), owns 200 nature reserves where important bird species are conserved and in which its members and the general public conduct their birding and other outdoor activities (www.rspb.org.uk). One of the activities that have set the popularity of birding in an upward swing is events. Conservation organisations like the RSBP have created 24 hour, evening, weekend, weeklong and even longer events. These centred around different birding activities such as bird ringing, wetland bird counts, day outings, bird counting competitions, Bird Fairs, awareness public and advocacy events, lectures for beginner or specialised ones, birding route or specific promotional tours and national bird censuses or surveys (www.rsbp.org.uk). The RSBP hosts an annual Big Garden Birdwatch where citizens compete on counting species that are most common visitors on UK gardens (www.rsbp.org.uk). In 2007, some 400 000 people participated in the survey and six million birds in 236 000 gardens were counted (www.rsbp.org.uk).

Apart from the garden bird count event, the worldwide growing popularity of bird watching has encouraged two UK birders (Martin Davies and Tim Appleton) to initiate the British Bird Watching Fair, the largest and first ever international bird watching expo and conference in the world (www.rsbp.org.uk). The event encompasses the whole spectrum of the bird watching industry whilst at the same time supporting global bird conservation programs. At this expo there are numerous bird watching and tourism product owners selling the latest products for wildlife enthusiasts, from scopes to sculptures, binoculars to bird food, e-Guides to eco-holidays (www.birdfair.org.uk). The British Bird Watching Fair held at Rutland Water every August, started in 1989 with a small number of birdwatchers and wildlife enthusiasts attending (www.birdfair.org.uk). In 2009, the British Bird Watching Fair had raised nearly £2 .5 million (US $3 .9 million) for conservation of the world's most threatened birds and places (www.birdfair.org.uk).

Bird watching has not yet been widely recognised by United Nations World Tourism Organisation. There are fragmented pieces of research worldwide which attest to the growing importance of bird watching in tourism arrivals and receipts. In Australia, significant numbers of international arrivals are drawn primarily for bird watching tourism as the country has several annual birding festivals and specialised birding accommodation establishments that contribute over US$ 70 million to local communities (Daryl & Buckley, 2001). Other examples of bird watching presence are in Guyana where the Guyana Tourism Authority, the Guyana Trade and Investment Commission sponsored by the United States Agency for International Development (USAID) developed a birding promotion program in 2006. The program ensured that marketing materials were developed and afforded Guyana representation at International Birding Trade Shows and sponsored familiarisation tours for media groups into Guyana (James 2007). This leaves open whether the development of a birding tourism program in Guyana mirrors the way bird watching grew into a thriving avitourism in other parts of the world. This question is valid and will be answered by the next section which will discuss the state of birding tourism globally, identifying the countries that have grown the sector, the key drivers for success and discuss the supply elements for the industry.

2.5 International birding tourism; a global overview

Available research shows that the ever-growing and popular bird watching is supporting a growing birding tourism industry. The industry includes travel for birding purposes, birding technological gadgets, ground travel operations and travel agency, accommodation businesses, events and festivals, entrepreneurship and a wide variety of hospitality amenities. One indicator that bird watching is a growing global tourism business industry is the launch of a publication containing background information about the birding market and birders by the Mississippi State University in the USA (www.naturalresources,msstate.edu). The publication includes statistics regarding the economics of the birding market such as participation trends, demographics and statistics on the characteristics of birders and information on how to begin a birding business (www.naturalresources.msstate.edu/resources/bird-watching.html).

Worldwide, several countries and private entrepreneurs have identified the need for birding related services and have set up operations to capitalise on the growing participation in tourism by the market. One US survey on recreation and the environment concluded that a number of outdoor, nature based, non-consumptive recreation activities, experienced significant growth in participation between 1983 and 1995 and that the most significant increase was in bird watching, which increased by 155% (The Saskatchewan Environment Society, 2006). Another survey by the Fishing, Hunting and Wildlife- Associated Recreation

(2001) revealed that bird watching was a popular form of outdoor recreation and growing at a fast rate with an estimated 60-76 million birders in the USA alone.

Apart from the USA, smaller states also exploiting birding based tourism. The recent introduction of a new birding tourism program by Guyana is one example (Endicott, 2006). The Guyana birding program is attracting inbound tour operators through familiarisation tours and public relations (Endicott, 2006). In 1999 the Costa Rican Tourism Institute estimated that 41% of its $1 US billion tourism income for that year was from bird watchers (Sekercioglu, 2002). In Northern Peru regional governments and tourism committees have initiated the Northern Peru Birding Route (Williams, 2004). In USA the Texas Parks and Wildlife Department launched The Great Texas Birding Trail which is a 500 mile trail linking users and landowners (Lindsay, 2006). In other parts of the world, Western Alaska is also growing in popularity as a birding destination and the concept is also growing in the UK fuelled by the British Birding Fair in Rutland (Endicott; 2006. Gorman; 2006. Lindsay; 2006. Williams; 2006). A key question to ask regarding the mushrooming of birding tourism across the world is what are the destinations doing to ensure success in this markets and what are the birding tourism supply elements that a destination is supposed to sort out. The discussion of the supply of birding tourism at an international level will seek to answer this question.

2.5.1 International birding tourism Supply

The section on the supply-side situation of the international birding tourism will briefly look at the international landscape of birding tourism attractions and products, the availability of services in the sector and the role of governments in supporting and developing birding tourism. The international landscape of birding products and attractions is very difficult to accurately illustrate as the sector is dominated by countries aligned to BirdLife International (BLI) which have discovered their birding natural resources through the organisation's global and country programs on birding conservation and research birds and their habitats. There are isolated cases of destinations across the globe that is exploiting the market of birding tourism.

Bird watching and birding tourism is dependant primarily on natural resources in the form of habitats and vegetation which provide a home for bird species. Other resources like water, shelter and food are critical for sustaining the daily living of species. It is estimated that there are 10 000 species in the world, a number which fluctuates due to new species being discovered and known ones becoming extinct (the dti, 2010). It has also been confirmed that 18% of the world total are endemic to Africa and that the continent hosts 23% of world species which comprises 28 out of 142 bird families (the dti, 2010). This species availability and richness is part of the core resource birding tourism resource base asset. Behind it are networks of natural habitats that support their sustainability and livelihoods.

Tourism is a service-oriented industry and one of the main birding tourism services available in the sector are specialised bird tour operators. Sekercioglu (2002) states that there were 127 tour operating companies offering bird watching tours in the world in 2002. An earlier report by Allan (1995), however, found that there were 350 part and full time professional tour operators in the USA and 62 in Britain in 1995. Evidence of the emergence of birding tour operators shows that the first such operators started in the mid 1970's and the USA's Victor Emmanuel Nature Tours (Vent) is the world's foremost international birding tour operator. Established in 1975, Vent is currently offering birding tours to over 120 destinations worldwide (www.vent.com). To date there are also ground tour operators who handle southern African tours for Victor Emmanuel Nature Tours such as Mr Geoff Lockwood which is an indication of one of the linkages between international and southern Africa based operations (Marais, 2009). Another USA tour operator that started operating in 1985 is Field Guides (fieldguides.com). The operator offers birding tours to over 100 destinations worldwide and is a second example that illustrates the width and depth of the global reach and size of the birding tourism market (fieldguides.com).

The numerous International birding tourism tour operators also play a key role in information dissemination as they package routes and information on various international destinations and communicate via websites and information booklets. The international birding community is critical for information dissemination. The community is organised according to birding internet based forums such as the Big Bird Forum, birding pal, Malaysia Bird Forum and Fat birder portals to mention just a few. These forums share first hand information on rare and interesting bird sightings, newly published field guides and books, newly discovered birding sites and general sharing of information on bird watching enhancing technology, trip reports and new products.

In Europe and the Americas, the bulk of birding tourism development initiatives receive support and funding from the State, Provincial and Federal agencies, community foundations, local businesses, non-profit organisations and individual contributions (www.americanbirding.org). The pioneering Great Texas Coastal Birding Trail (GTCBT) was established in 1993 by The Texas Parks and Wildlife Department in the US as an entirely State initiative (Lindsay, 2006). Its aim was to link users and stakeholders for sustainable conservation and birding based tourism (Lindsay, 2006). Similar regional governments and tourism committees have been established in Peru (Williams, 2006). The Northern Peru Birding Route gives birders access to over 1400 bird species in the region, 8% of which are endemic species, 137 restricted ranges, 65 globally threatened and 29 near threatened species (Williams, 2006).

In addition, there is a mixture of state collaboration with local tourism agencies and international donor foundations. One such example is the United States Agency for International Development which sponsored the launch of a new birding tourism program in Guyana in conjunction with the Guyana Ministry of Tourism and its local tourism agency (Endicott, 2006). In the UK, the Royal Society for the Protection of Birds (RSPB) assumes a leading role in both the supply of infrastructure and demand creation for birding tourism as it owns over 200 nature reserves in which the birding public and its members can visit for birding and other wildlife viewing purposes (www.rspb.org.uk). This organisation is a leading non-profit organisation in the UK with over a million members (www.rspb.org.uk).

2.6 Conclusion

The discussion in this Chapter sought to contextualise and build consensus on the definition and description of the concepts of bird watching and the newly coined noun, avitourism. In addition the chapter gave a synopsis of the historical development of bird watching as a pastime at a global perspective. This included a description of the global natural resource base assets for birding and a landscape of the existence of birding tourism activities internationally.

The next chapter is a move from general to specific in that it will have an in-depth analysis of bird watching and birding tourism in South Africa. It will trace the evolution of bird watching and birding tourism in South Africa focussing both on the supply and demand side analysis of this niche market.

Chapter 3

Bird watching tourism in South Africa

Since the 1994 democratic dispensation in South Africa, the growth trajectory of the country's tourism industry changed positively and continues to do so today. International arrivals in the country have grown over 100% since 1994 (SAT, 2009). As shown in the introduction Chapter, leisure (which includes ecotourism/ bird watching) is the biggest motive for people travelling into South Africa from two leading international markets, Europe and the Americas (SAT, 2009). These two markets have been shown to be the largest source markets for South Africa's birding international arrivals (the dti, 2009). The Chapter will endeavour to understand the evolutionary events around bird watching in South Africa and the parallel industrialisation or commercialisation of this sporting activity into one of South Africa's 'watch list' tourism markets.

In this Chapter the historical developments and events that have shaped birding tourism to its current form in South Africa will be discussed. In discussing the historical development or building blocks of birding in the country, the central role of BirdLife South Africa, a non-profit wild bird conservation organisation, in advancing the development and growth of the sector is discussed. Since most of BirdLife South Africa's work is on birding tourism supply issues, it is difficult to separate the history and the supply analysis. These two elements, the historical development of birding and the supply side elements of birding tourism in South Africa, will therefore be presented in this chapter.

Lastly, the discussions on the history and supply side analysis will be based on interviews which were held with key industry participants and literature review. The supply-side analysis is as well based on a survey conducted between July and August 2010 via interviews and an online questionnaire to which 35 tour operators responded.

3.1 Historical development of bird watching in South Africa

As in the UK and USA, there is little clear evidence on the initial emergence of birding tourism in South Africa. The establishment of the Southern African Ornithological Society (SAOS) in 1930 provides some indication of the rise of the study of birds and of birding in South Africa (Drummond, 2008). From the formation of the SAOS in 1930 to date, there are numerous events and development programmes that have played a significant role in the growth of bird watching and the resultant tourism component as shown in Figure 3.1. The SAOS, now called BirdLife South Africa, has played a catalytic role in increasing bird watching awareness and development of the birding tourism industry in South Africa. Its contribution ranges from;

- Formation and growth of a network of BirdLife branches/ clubs countrywide,
- club/branch birding outings,
- organising of birding lectures and courses,
- organisation of bird monitoring surveys,
- species and habitat research and conservation,

- publication of birding knowledge and promotion of birding locations,
- formation of global partnerships by the SAOS and BLSA,
- bird guide training programme development,
- birding routes development,
- public and private sector resource mobilisation for bird watching development and
- the promotion of South Africa as a birding destination locally and internationally.

3.1.1 The formation of bird clubs

The core support structure for the growth of bird watching in South Africa was the formation of bird clubs and volunteers aligned to the Southern African Ornithological Society (SAOS), currently known as BirdLife South Africa. Known as branches or bird clubs, the first one to be established on 8 March 1947 was the Witwatersrand Bird Club (Gush, 1995). The Wits Bird Club was not the only branch of BLSA to be formed in 1947; another branch called the Pretoria Bird Club was set up (Askew, 2009). Currently, there are over 50 such branches of BirdLife South and over 8 000 members nationwide (the dti, 2009). The branches play an important role in the South African birding tourism development in several respects. Bird clubs are the orientation ground for new entrants into the bird watching hobby through the birding courses and birding tours they organise for members. The first volume of Bokmakieire, the Wits Bird Club membership newsletter publication explains about how the famous bird author, Dr Austin Roberts, excited participants at the first meeting of Wits Branch of BLSA in June 1947 (Gush, 1995). This is a clear indication that bird clubs or branches of the SAOS were and continue to be the magnets that attract and induct people into bird watching.

3.1.2 Club activities and events

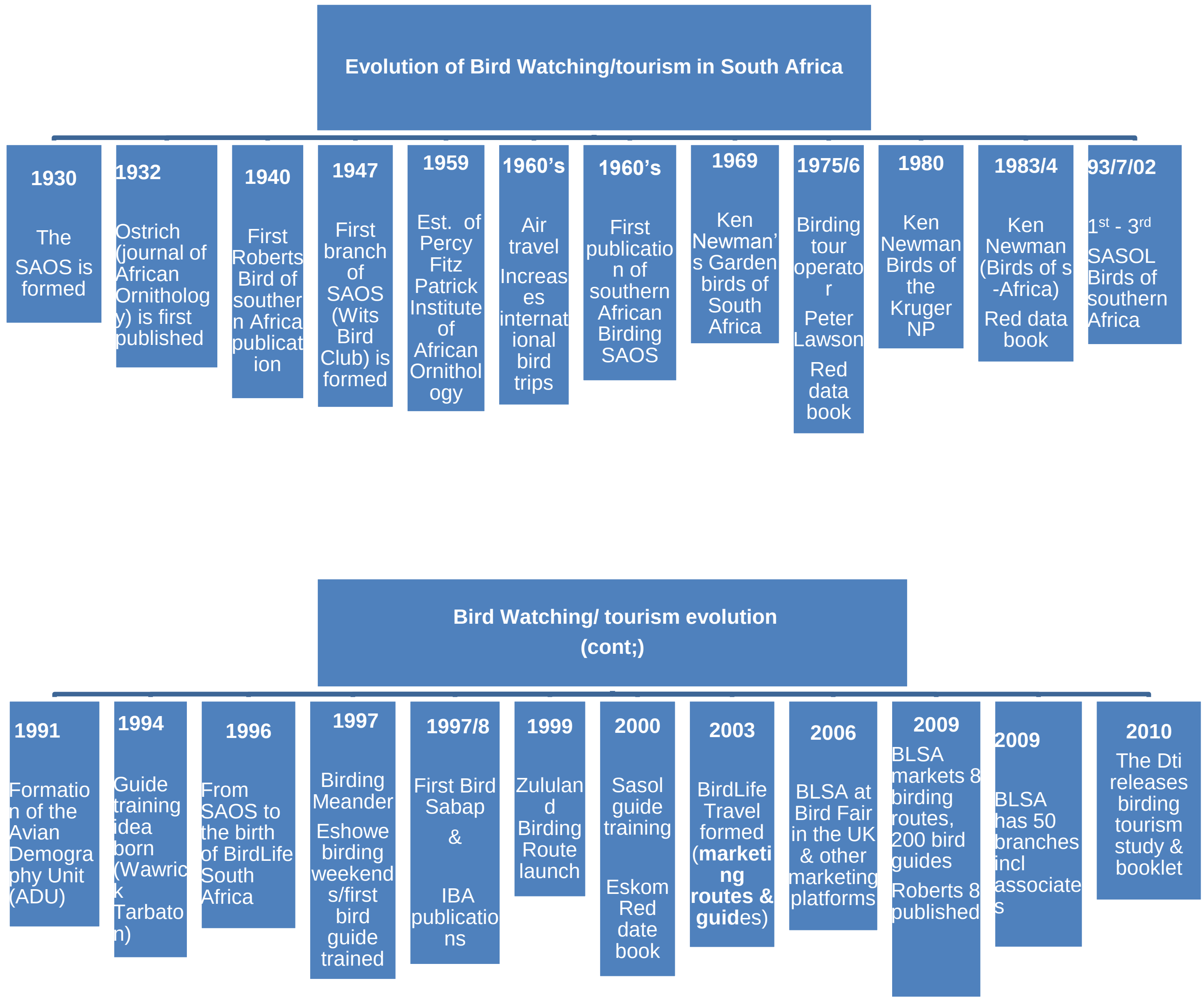
Linked to the growth of bird clubs was the initiation by clubs of activities and events which played a pivotal role in growing the popularity of bird watching in South Africa. These events led to the increase in the number of people embarking on bird watching activities, tours and bird monitoring excursions. The events played a critical role in growing the bird watching culture amongst South Africans. Birdlife South Africa, whose mission is to ensure the study, enjoyment and conservation of wild birds and their habitats, has been at the forefront of the creation of some of the key birding events that have played a leading role in popularising birding (Drummond, 2009). Figure 3.1 illustrates some of the major events premised by the formation of the SAOS in the 1930's followed by the formation of its first subsidiary or associate branches in the 1940's. The 1950's saw the establishment of the Percy Fitz Patrick Institute of African Ornithology (a birding scientific study unit of the University of Cape Town). The 1960's saw the increase in international travel and the first birding field guides in South Africa and like in the US, the first South African birding tour operator emerged in the 1970's (Ricketts, 2010).

Amongst the most important events is Birding Big Day, which was launched over twenty years ago, and involves a competitive bird counts within a 24 hour period (Halbhuber, 2009).

The event is used to raise funds for conservation by BLSA. In this event, birders compete in teams counting birds in gardens and the wild. Other birding promotional events created by BLSA include the annual National Birding Week, which is aimed at educating the public and school children about the relationship between the environment, birds and people. Organised by BirdLife South Africa, the event occurs alongside the National Bird Fair and showcases all birding related services and products (Halbhuber, 2009).

In addition, birding events are also organised by non- BLSA aligned groupings like the Honorary Rangers. This group of wildlife volunteers organises the honorary birding weekend at the Kruger National Park each year (Halbhuber, 2009).

Apart from events organised by bird clubs and free standing volunteer groups like the Honorary Rangers, there are many additional promotional events that are organised throughout the year under the banner of the 8 BLSA established birding routes (Halbhuber, 2009). These include the Glendower 4x4 birding in Limpopo, Standford Glendower Bird Fair, Glendower Garden Bash and the Save the Seabirds Festival amongst others (the dti, 2009). The culture of BirdLife South Africa branches to plan and organise birding outings, events and ornithological travel lectures is an important aspect and increases the value of birders and birding tourism to domestic tourism spend and geographic spread.



Source: designed by the author; based on literature review

Figure: 3.1 Major birding evolutionary events/ timeline in South Africa

3.1.3 Conservation research

The third most important contribution of club members to the growth of bird watching and tourism is the generation of scientific knowledge and conservation efforts of birds and their habitats. Bird club members volunteer their time and money on bird ringing tours, bird atlasing errands and several other bird monitoring surveys which generate knowledge on the conservation status and distribution of species. This is again a valuable BLSA culture that contributes significantly to South Africa's tourism economy through geographic spread; stay and expenditure spend at depressed rural communities of South Africa.

Apart from the mobilisation of citizen scientists by the SAOS, this organisation also runs a number of ornithological research programs. The one programme that played a significant role in terms of galvanising support for the organisation and growth in bird watching interest was the first southern African Bird Atlas Project (SABAP 1) which took place between 1990 and 1995 (Halbhuber, 2009). The aim of the program was to understand the geographical distribution of all bird species in southern Africa and involved field surveys by birders, otherwise called 'citizen scientists'. Halbhuber (2009) claims that BirdLife South Africa's membership rose considerably during the period of the atlas project. BirdLife South Africa and the Avian Demography Unit (ADU) are currently running a second southern African Bird Atlas project (SABAP 11) which may create new interest amongst non-birders (Halbhuber, 2009).

Bird watching continued to grow between the 1960's and 1990's through several other conservation or bird monitoring programs of BirdLife South Africa and its International partnership (BirdLife International). Some of the programs include the Coordinated Avifaunal bird road Counts (CAR), the Coordinated Water bird Counts (CWAC), Birds in Reserves Project (BIRP) and bird ringing activities (Askew, 2009). These bird monitoring activities are a component of recreational birding programs of BirdLife South Africa's more 50 core and associated branches and clubs and as a result introduce more and more people into bird watching (Askew, 2009).

3.1.4 Publication of research work

Bird watching in South Africa was further promoted as a result of knowledge creation, research and publishing of research results which was led by the SAOS and by individual ornithologists and private authors. The publication in 1940 of the famous Roberts Birds of southern Africa reference bird book has, according to Marais (2009), played a very crucial role in popularising birds and bird watching. Other birder-focussed publications include a newsletter called "southern Birding" whose name changed from Southern Birding to Bokmakierie and to Indaba Inyoni (Halbhuber, 2009). Now called BirdLife Bulletin, the newsletter is a supplement of *Africa Birds and Birding* magazine (Halbhuber, 2009). The newsletter covers SAOS and BLSA news, bird sightings, birding outings and trip reports and advertising of birding services and products and is circulated to over 200 000 people both locally and internationally.

Another publication that continues to play a critical role in the promotion of the growing popularity of birding is *Africa Birds & Birding*, which was first published by Black Eagle Publishing in 1992 (Halbhuber, 2009). The magazine currently has a readership of 200 000 in South Africa and abroad. This is a significant birding tourism news media covering local and international birding trip reports, advertising for birding services and products such as bird tour operators, accommodation, guiding service, birding equipment and vehicles suitable for birding trips. Other publications that have contributed to advancing birding conservation efforts and tourism are the Important Bird Areas publication, the Eskom Red Data Book and the first Bird Atlas Project 1 & 11 (Halbhuber, 2009).

3.1.5 Training and development

In further advancing and deepening the popularity of bird watching, the creation of knowledge and publication of such on the birds and birding science and distribution facilitated the development of training programs for both scientific learning and awareness programs. Training played an important role in creating awareness around the value of birds to people and on introducing bird watching to non- birders (Drummond, 2009). Drummond (2009), a past Chairman of BirdLife South Africa and now a well-known birding personality, started bird watching after attending one of Monti Brett's beginner bird watching courses. BLSA branches use birding courses for beginners as a way of attracting new members into their organisation and to keep the existing members motivated (Halbhuber, 2009). The branches of BLSA also offer evening and weekend field and classroom specialist birding courses and outings which are led by seasoned birders. Sasol and BirdLife South Africa's introduction of a level 2

National Qualification Framework bird guiding training course in 2000 marked the beginning of a significant number of black youth's entry into bird watching primarily as an employment opportunity (Indaba Inyoni, 2000).

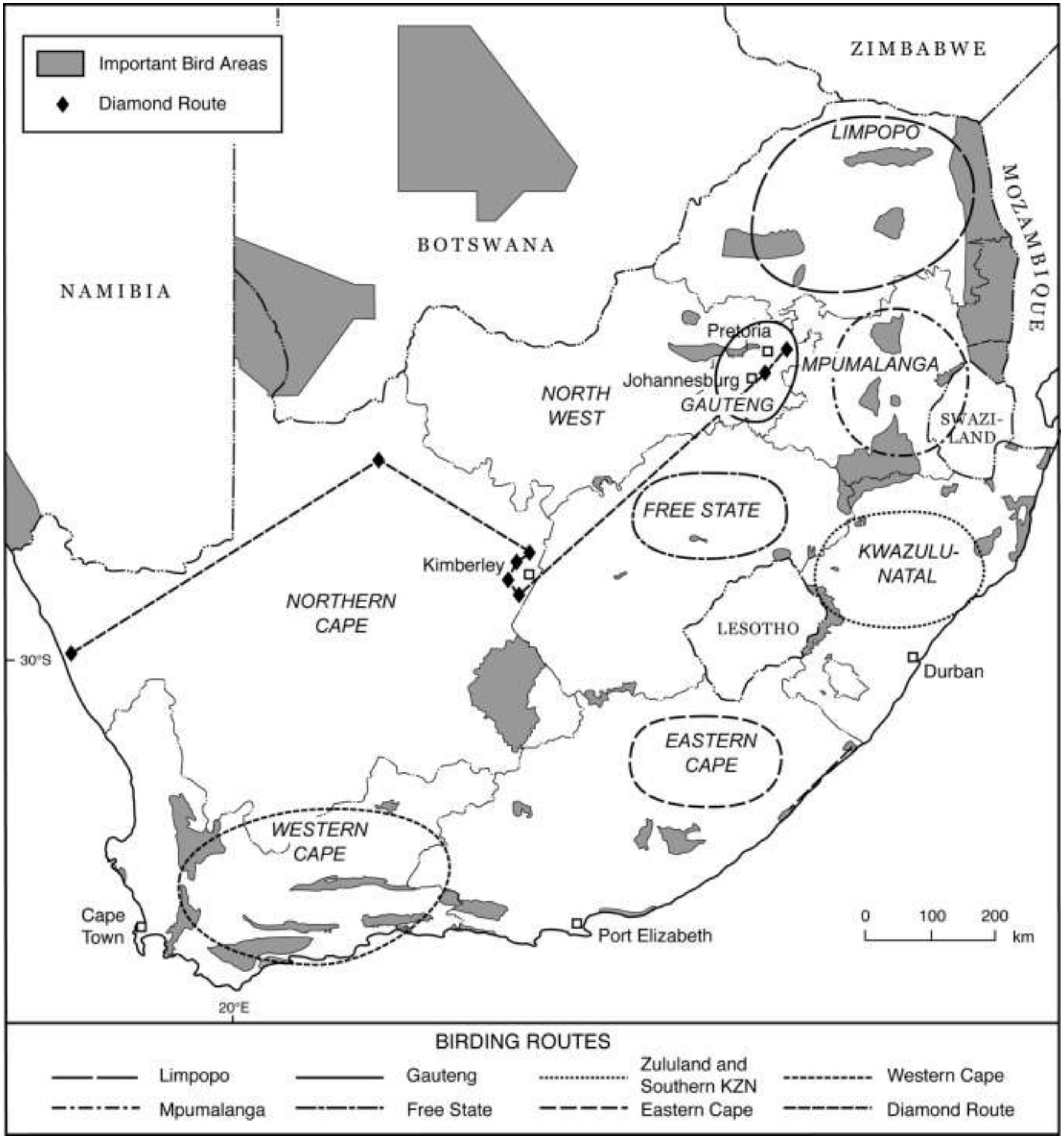
3.1.6 Transformation of the SAOS to BLSA

Of all the contributing factors to the growth of bird watching in South Africa, among the most critical was the transformation of the Southern African Ornithological Society from an organisation that was more interested on the scientific study of birds and birding to a people-centred organisation that embraced communities and involved them in its conservation activities (Drummond, 2009). This change started in 1996 when the SAOS joined the global partnership in bird conservation under BirdLife international partnership, (Drummond, 2009). The change in approach influenced BLSA to align its brand identity with that of BirdLife International. The partnership opened opportunities for collaboration on the Important Bird Areas Programme (Drummond, 2009).

3.1.7 New birding conservation approach by BLSA

The change from Southern African Ornithological Society (SAOS) to BirdLife South Africa (BLSA) introduced a paradigm shift for the SAOS to focus on the development and promotion of bird watching and its tourism component (Drummond, 2009). BirdLife South Africa's partnership with BirdLife International opened access to donor funding and assistance from the United Kingdom on community based projects such as *'the learning for sustainable* *school environmental education material'* (Drummond, 2008). Bird watching tourism activities became one of the critical focus areas of the new organisation. BLSA was involved in the BirdLife Meander and Zululand birding development which led to the launch of the first birding tourism route in South Africa, the Zululand Birding Route (Biggs, 2007).

From 1997 when the Amajuba birding Meander was established to date, 8 birding routes that cover almost all South African Provinces have been developed and they are all promoted by BirdLife South Africa. As shown in Figure 3.2, the birding routes include the Western Cape, Mpumalanga, Gauteng, Greater Limpopo, Diamond, Southern KZN, Zululand and the Free State birding route (the dti, 2010). Although not all IBA's fall within regions that have active birding routes, Figure 3.2 shows a strong bias towards already identified Important Bird Areas (IBA's) more especially in regions such as the Western Cape, Mpumalanga and Limpopo.



Source: The Important Bird Areas of southern Africa

Figure: 3.2 Locations of Birding Routes

This section discusses the historical development of bird watching and the resultant tourism element in South Africa and provides the fundamental basis against which tourism as conservation tool was prioritised by BirdLife South Africa. The next sub section will discuss the birding tourism supply components and begins by defining South Africa's core birding tourism asset base and then provides a discussion of the structure of the local industry.

3.2 Birding tourism supply in South Africa

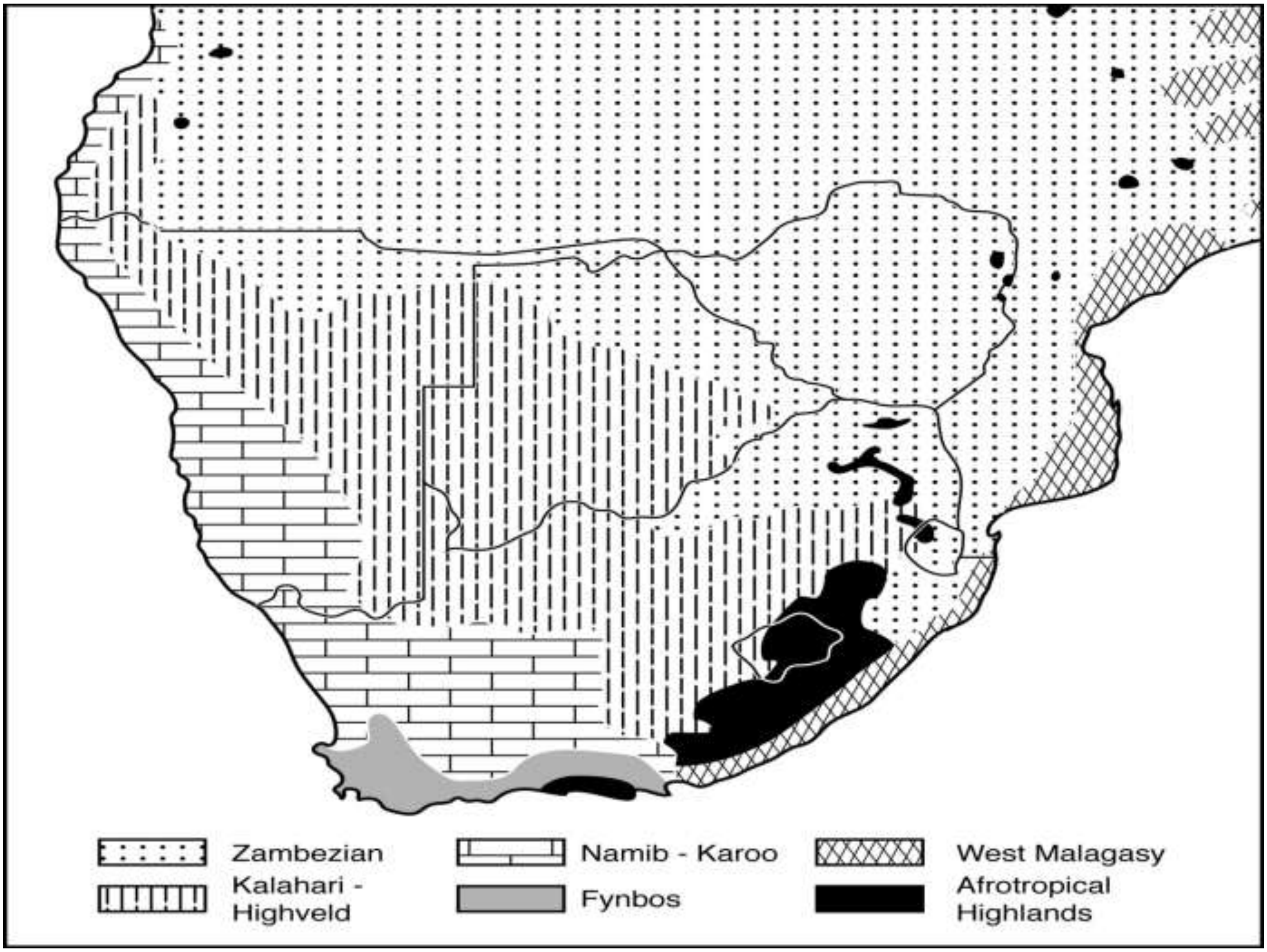
The discussion on the supply side of birding tourism in South Africa will substantiate a number of elements on destination management issues. In his description of tourism supply, Nelwamondo (2009) mentions that natural and man-made resources, telecommunication infrastructure, accommodation facilities, tourist guides, transportation provision, travel agency services, tourism information bureau and service provision are the main tourism resources that are necessary for tourism supply. Nelwamondo (2009) further acknowledges that the rise in environmental awareness and sustainable development has introduced opportunities on ecotourism and that elements like landforms, water quality, flora, fauna, air quality and the physiography of areas constitute the core components of ecotourism supply.

The supply side elements that will be discussed in this chapter will be in line with Nelwamondo's (2009) categorisation of tourism supply components. These include the definition of the core natural resource base that supports the diversity of bird species in South Africa, the structure of the sector in the country, the financiers of development efforts, marketing and promotion of the birding tourism offering, the packaging of the information on the offering and the regulation of the industry. In conclusion, results on the demand side analysis for the local birding tourism will be discussed. Again, these are elements through which BLSA has contributed to birding tourism development as indicated above. The discussion in this sub section further indicates BLSA's major role in facilitating the development of the core birding tourism destination supply components against which the bird watching tourism is currently thriving.

3.2.1 Natural resource base

As in the international review, the discussion in this chapter will begin by looking at the base assets of the birding tourism industry. Birding tourism in South Africa is based on the rich and diverse natural habitats and vegetation across the southern African region. According to Cohen et., al. (2006), finding bird species links to understanding the habitats where such species occur. The vegetation map of southern Africa shown in Figure 3.3 comprises 8 broad vegetation or habitat types ranging from the Namib Desert in Namibia, the Namib Karoo covering most of the Western Cape except for the endemic fynbos habitat from Cape Town towards Port Elizabeth. The dominant vegetation in South Africa is the arid savanna (Kalahari Highveld) which covers part of the Eastern Cape, Kwazulu Natal, Northwest Province, almost all of Limpopo and Mpumalanga. The Afromontane (Afrotropical highlands) biome is dotted along the Drakensberg and the tip of the Soutpansberg in the Vhembe region of Limpopo. The Atlantic east coast of South Africa from Port Elizabeth through Maputo upwards is covered by the lowland forest (West Malagasy) while the northern Transvaal, the Free State Province, Lesotho and parts of Swaziland are home to the grassland or Zambezian biome (Cohen et.,al., 2006). This habitat diversity is said to be a strategic advantage for southern

Africa as compared to continental Africa (Cohen et., al., 2006). This habitat richness is critical for birding tourism as it supports the birding diversity that the country possesses.

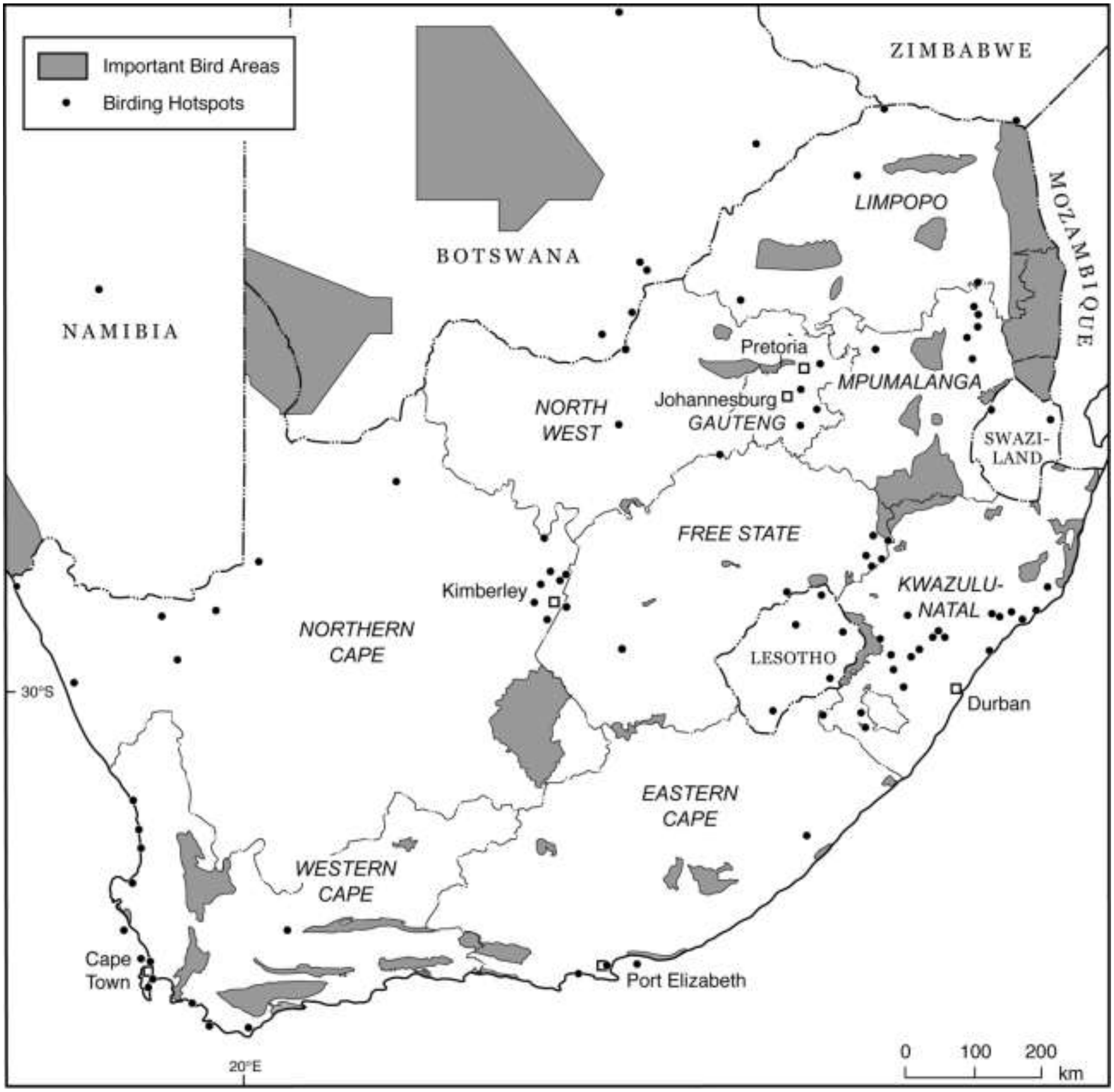


Source: The Important Bird Areas of southern Africa

Figure 3.3 Birding habitats map; southern Africa

In its efforts to conserve birding habitats, BLSA in conjunction with the BirdLife International's Important Bird Areas (IBA) Programme conducted research to determine which natural habitats support particular bird species in the country. The study identified 122 sites or natural habitats across in South Africa which are classified as 'Important Bird Areas' (the dti, 2010). Some of the requirements that qualify a site to be classified as an Important Bird Area are; ability of a site to support endemic species, rare species, to have a diversity of species and for supporting high volume of species in a single location. Figure 3.4 shows the location of these sites in the country. Concurrently, these sites form the core birding sites that anchor most of the established birding routes in South Africa.

Apart from the Important Bird Areas that were identified by the IBA publication, there are many other birding areas available in the country. Figure 3.4 shows the numerous other birding sites that have been discovered by experienced birders and ornithologists throughout the years. These are significant and frequented birding hotspots for various reasons. Some sites have vegetation which allows for normally elusive species to be sighted with ease, have a rare species, are visited by vagrant species or species which normally do not occur at a particular geographic area and others are paths for migratory species. Figure 3.4 also identifies these sites dotted alongside the IBA's. It is important to note that most of the identified birding hotspots are not necessarily IBA's. These are normally sites on privately owned land, communal lands and government nature reserves. According to the dti (2010), most domestic and international birders spent most their time birding in Kwa Zulu Natal, Western Cape, Mpumalanga, Limpopo and Gauteng Provinces in order of importance. Mpumalanga records the highest time spent amongst international birders to South Africa.



Source: From Important Bird Areas of southern Africa publication and southern African Bird Finder

Figure: 3.4 Location of Important Bird Areas and birding hotspots in RSA

Birding habitats have a direct link to species diversity as different biomes support various species. In terms of species diversity, there are over 900 bird species recorded in southern Africa and 820 of them are resident or regular visitors to the region (the dti, 2009). Southern

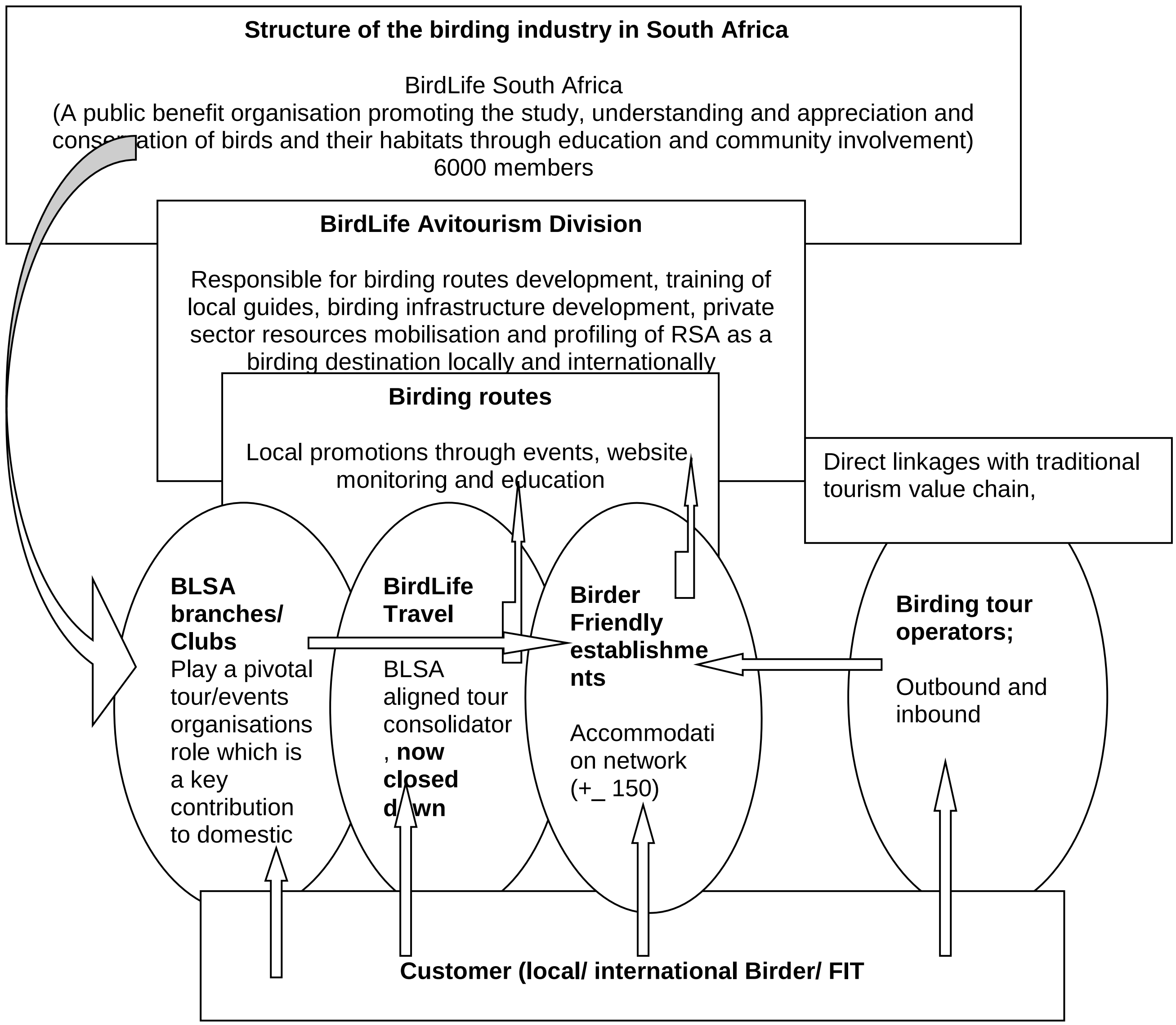
Africa hosts up to 35% of Africa's total species and 134 species are endemic to the region (Barnes, 1998; the dti, 2010). The dti study found that it is impossible to distinguish South African bird species (which are estimated at 725) from those of the southern African region because the region's field guides (books) give a species account for southern African not South Africa and also because far fewer species are endemic to South Africa alone (the dti, 2010).

In another account, Barnes (1998) indicates that there are 600 terrestrial species that breed within the country and 62 that are either endemic or near endemic to South Africa (Barnes, 2000). Endemic species are critical for birders to decide on where to go birding as such species are restricted to a particular geographical area in a country. Apart from endemic species, other bird species are range-restricted which means they are only found within a particular geographical area and habitat in a country. This condition plays an important role in determining birding locations or sites.

Besides endemic species that are classified as extinct in the wild on the southern African bird list. Barnes (2000) further estimates that 125 southern African species of bird species are listed as threatened with extinction. Some of the underlying major causes of environmental problems are human population growth, habitat loss and the rate of urbanisation (Barnes, 1998). Barnes (1998) maintains that unlike in the 1970's and 1980's when most efforts on biological diversity preservation focused on particularly Red Data Species, a new 'paradigm shift' is beginning to focus towards ecosystem preservation as the way to conserve processes vital to the long-term survival of systems. Crowe et., al., (1994) caution that the conservation of Africa’s biodiversity is about the wise use of natural resources and the ability of the resources to contribute to socio-economic challenges. It is this view across the international conservation fraternity that has inspired the recognition of bird-based ecotourism (commonly referred to as Avitourism) as a potential niche tourism sub-sector (Allan, 1994).

3.2.2 The structure of birding tourism in South Africa

As indicated previously, birding tourism in South Africa is led by the non-government sector and in particular by BirdLife South Africa. The primary role that BLSA plays is sustainability of the bird watching sector by ensuring the continued survival of bird species through its species and habitat conservation programmes (as described above) which form the core product of the country’s birding tourism industry. The organisation’s conservation and research programmes work towards reversing species from the brink of extinction. Figure 3.5 illustrates the existing birding tourism supply elements, its structure, major players, institutional arrangements and the backward and forward linkages in the birding tourism trade. Driven by BLSA’s club events, local tour operators involved in inbound and outbound operations, birder friendly accommodation establishments catering mainly for birders and product packaging and promotions through the 8 birding routes, BLSA is indeed the main driver of supply and demand mechanisms in the market.



Source: created by author; based on interviews and literature review

Figure: 3.5 Structure of bird watching tourism; South Africa

In the structure of birding in the industry BLSA is not only the custodian of the core birding offering but it also assumes a key role by driving bird watching development efforts through spatial and business planning for birding route development, training and skills development, organisation of local clubs and information sharing on where to watch rare and special species.

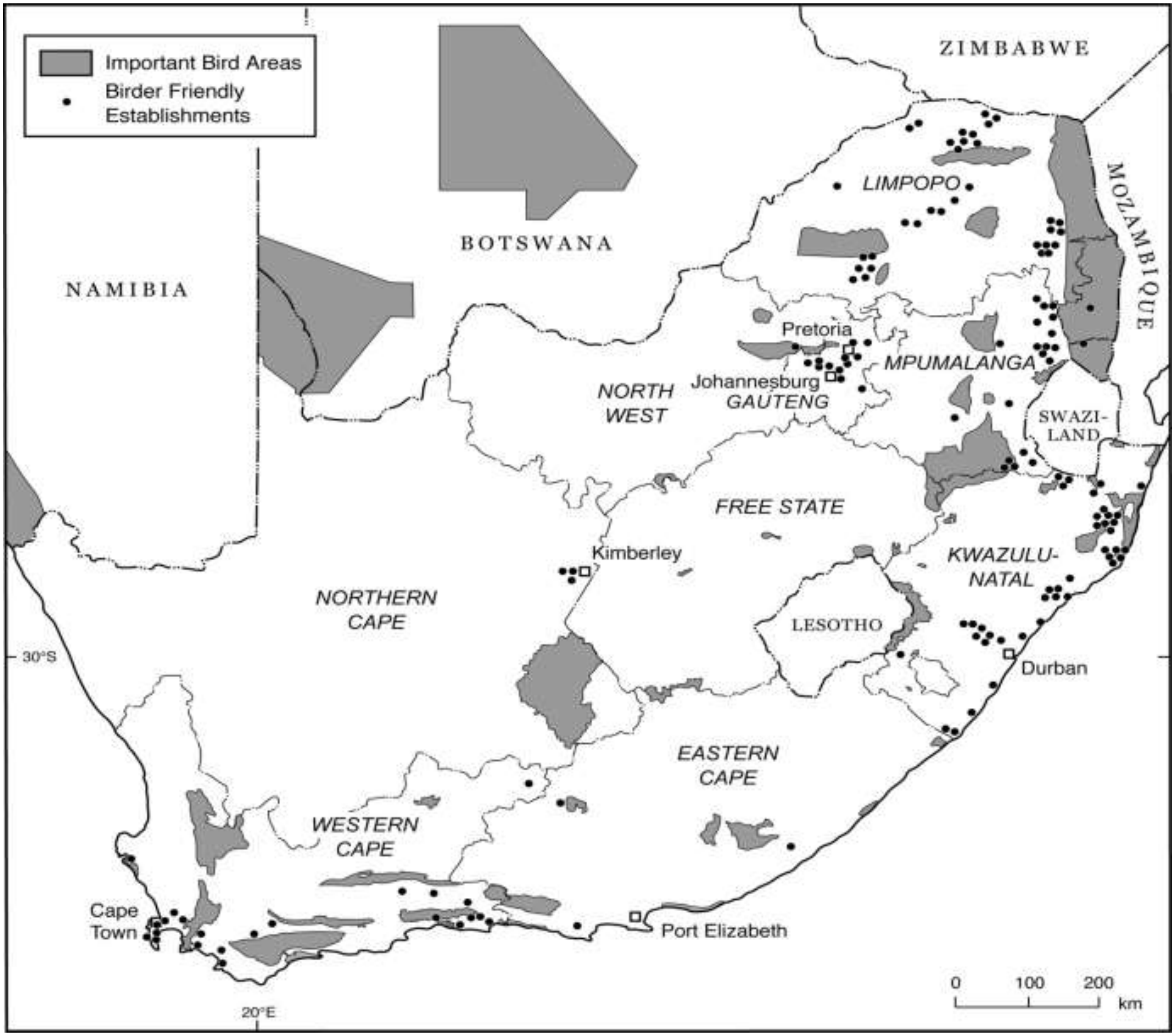
3.2.3 Resource and partner mobilisation for avitourism

Since the establishment of the first bird guide training program in 1997, which was sponsored by the United Distillers, BirdLife South Africa has worked with companies and several organisations to develop birding tourism programmes (Biggs, 2007). Some of the organisations include Sasol, which sponsored the development of government accredited local bird guiding programme, Rio Tinto and Richards Bay Minerals, which has funded the development and marketing of the Zululand Birding Route, Phalaborwa Foundation which continues to support the introduction of birding awareness in school curricula, De Beers Consolidate Mines and E Oppenheimer & Son which funded the development of their conservation areas in the Northern Cape, Gauteng and Limpopo into a birding route and a German counterpart to BLSA, NABU, which supported the development of the Mpumalanga Birding Route (Halbhuber, 2009). BLSA initiated several other relationships with corporate South Africa and Government to generate funds for the development of bird watching tourism in the past 10 to 15 years. Among other partners are the National Lottery, BirdLife International, SAPPI and local municipalities in Kwa Zulu-Natal (Pritchard, 2010).

Again, in furtherance of birding tourism development, BirdLife South Africa established a fully fledged avitourism division in its structure and operates a specialised website for tourism promotions (Taylor, 2010). Recently, the Department of Trade and Industry partnered with BLSA to commission a national birding study and niche sector development strategy in 2009 (Taylor, 2010). This comprehensive sector scoping is complete and the Department has produced, launched and distributed promotional booklets which are meant to guide the development of the sub-sector (Meyer, 2010). The BLSA is clearly a major influence and driver in birding tourism development in the country.

3.2.4 Hospitality/accommodation

Following the recent proliferation of birding routes in the country, the need arose for accommodation and specialised tourist care for this market. Once more BLSA took leadership and initiated the “Birder Friendly Establishments” program. This program developed a set of criteria for accommodation establishments and tour operators that serve the birding market (McCartney, 2009). Establishments are assessed against a set criteria and signed up and promoted amongst travelling birders if found compliant (Kaiser Associates et., al., 2009). The accommodation establishments play a critical role in the birding tourism supply chain because birders are able to visit areas they otherwise wouldn’t prefer due to lack of suitable accommodation and other amenities. Figure 3.6 shows some of the over 150 BirdLife South Africa accredited birder friendly establishments (McCartney, 2009). The base map of IBA’s has again been used to illustrate the relationship between IBA’s and the birder friendly accommodation facilities. It is clear that the majority of the facilities are adjacent to the identified Important Birding Areas and that Kwa Zulu Natal and Limpopo Province are the leading regions with such facilities.



Source: The Important Bird Areas of southern Africa and Birdlife South Africa website

Figure: 3.6 Locations of Birder Friendly Establishments in South Africa

3.2.5 Tourist guides

Provision of services is identified as one of the key components needed by tourists when visiting a particular tourist destination (Nelwamondo, 2009). One of the core services is tourist guiding. The local birding tourism industry has addressed the provision of the tourist guiding service through the local bird guide training and development programme. In his timeline of avitourism development in South Africa, Biggs (2007) traces the idea of training of local bird guides to the famous ornithologist and birder, Warwick Tarboton, who is said to have discussed the concept with other birders in 1994. The first local bird guides to be trained were the Bell's bird guides. The training programme took place in Wakkerstroom, Mpumalanga in 1997 under the sponsorship of Patrick Cardwell (an enthusiastic birdwatcher) from United Distillers (Biggs, 2007).

The local guide training program is sustained by the birding tourism route model as used by BirdLife South Africa (BLSA) to develop birding in the country. Youth residing in communities close to sites of birding importance are identified and trained as local bird guides. In order to align this program with national regulations, BLSA secured accreditation with the Tourism Hospitality, Education, Training and Sports Authority (THETA) to train the National Qualification level 2 training program for site bird guiding (Pritchard, 2009). Since the inception of the guide training program in 2000, over 200 local site bird guides have been trained and approximately 80 of them still operate on sites identified and linked to the eight established birding routes across the country (Taylor, 2010). BirdLife South Africa ensures that these guides obtain regular customers by linking them with local and international birders who plan their trips using birding routes websites (Elliot, 2009).

3.2.6 Tour operations

Another service that birders need in order to make arrangements for their birding trips are tour operators and travel agency services. In South Africa, the first tour operating company specialising on bird watching, Lawson's Birding tour operations was launched in 1975 Lawson's Birding tours (Ricketts, 2009). This organisation played a key role in attracting inbound arrivals and influenced the establishment of supporting birding related businesses, such as birder friendly accommodation, birding technology gadgets and freelance bird guides.

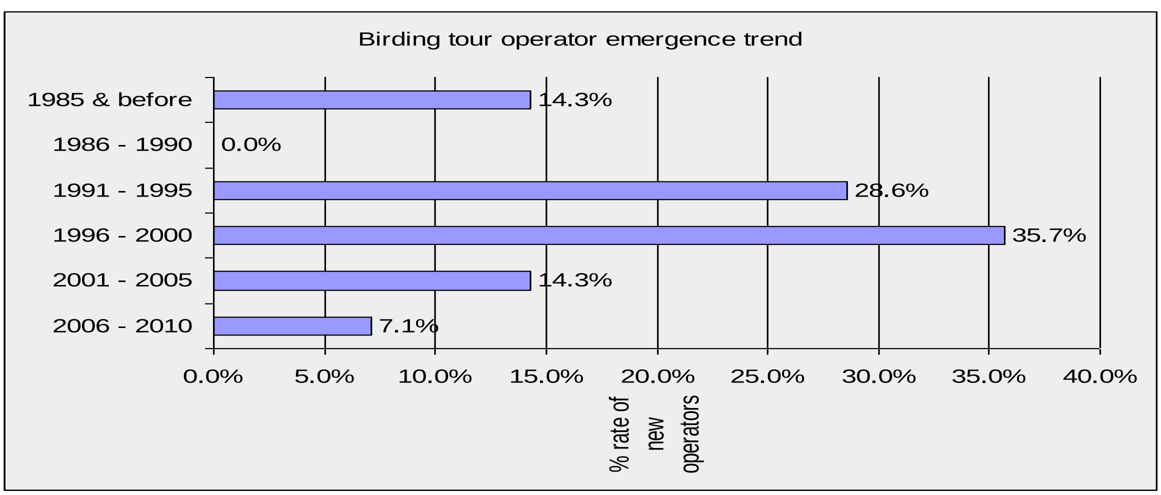
In 1997, South Africa had 10 tour operating companies according to Turpie and Ryan (1998). The recent study by Kaiser Associates et., al., (2009), however, indicates that there are now 20 ground birding operators based in South Africa including two (Birding Eco tours and Rock Jumper) that offer birding tours to destinations across the world. The growth of tour operators was confirmed by the more recent study by the Department of Trade and Industry which showed that there are now over 30 birding tour operators in the country (the dti, 2010).

In addition, there are also Wildlife and bird photographic tour operators in South Africa which offer photographic tours in the country and abroad (Drummond, 2009). These operators organise tours to prime birding and photography locations for the birders to take quality pictures on birdlife and the natural environment (Drummond, 2009). This segment is a fast growing sub-sector of avitourism businesses involving birds and birding as the core product offering (Drummond, 2008). According to Drummond (2009), there are many freelance tour operators in the country who are unregistered and are used by international birding operators to conduct local and regional tours on behalf of the parent company. It is believed that a thorough audit of smaller and unregistered operators could result in an even higher number of tour operators in South Africa (Drummond, 2009).

Besides the privately run bird tour operators, in 2005 BirdLife South Africa established a birding travel information agency called BirdLife Travel (Elliot, 2010). The purpose of Birdlife Travel is to offer information on birding sites, to link birders to Birdlife South Africa trained local bird guides and to help birders package and book travel arrangements into South Africa. As shown on Figure 3.5, BirdLife Travel is not a private company but a branch of BirdLife South Africa's Avitourism division set up to help channel birders to its birding routes and to market the birding routes at local and international travel trade shows and exhibitions (Elliot, 2009). BirdLife Travel has since closed down following a restructuring and new strategic approach taken by BirdLife South Africa's Avitourism division (Taylor, 2010). The services that were offered by BirdLife Travel continue to be fulfilled through the avitourism website and by BirdLife South Africa's tourism complement (Taylor, 2010).

3.2.6.1 The services of birding tour operators

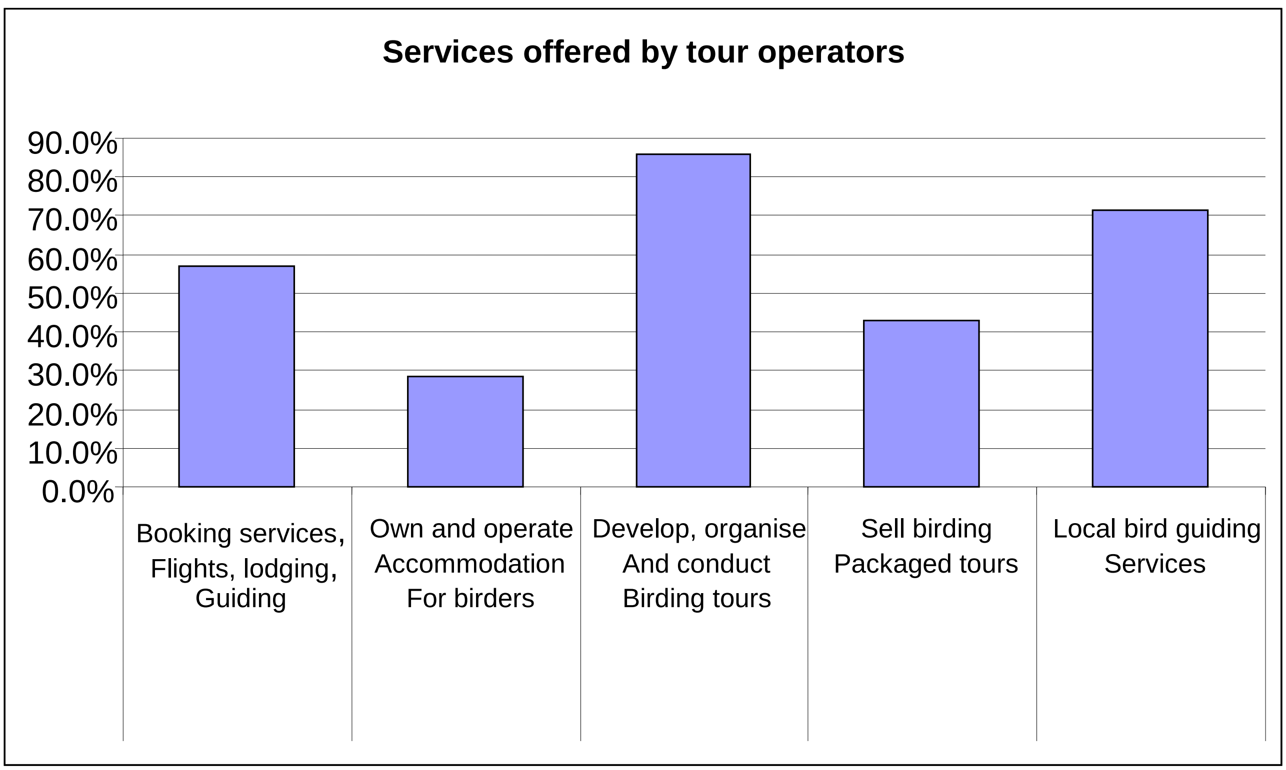
The section draws together findings from a comprehensive survey conducted amongst local tour operators in July and August 2010. The electronic survey captured 35 responses primarily from South Africa birding tour operators. Information regarding the actual beginning of the industrialisation of birding tourism either in South Africa through the establishment of the first specialised birding tour operator, lodge or any form of travel related business that specifically serves the needs of travelling birders is hard to find. According to this survey, only 14 percent of the surveyed operators were established 26 years and beyond whilst 29% between 16 to 20 years ago. According to Figure 3.7 more birding tour operators started operating 11 to 15 years ago (36%) and 8% have been established in the last 5 to 10 years indicating a decline in the establishment of new birding tour operators and possibly the maturing nature of the sector based on its existing marketing effort.



Source: survey

Figure: 3.7 Emergence of birding tour operators in South Africa

The birding tour operating companies offer specific travel services within the value chain. The largest service is outbound birding travel (35%), inbound travel services (34%), ground operations (22%) and the least offered service is travel agency at just 9%. Figure 3.8 indicates that over 80 % of operators in the sector develop, organise and conduct birding tours, 70% even offer local bird guiding services whereas 57% offer booking services, flights, accommodation and guiding services. It appears that companies offer one, two or all of these services with varying degrees of emphasis.



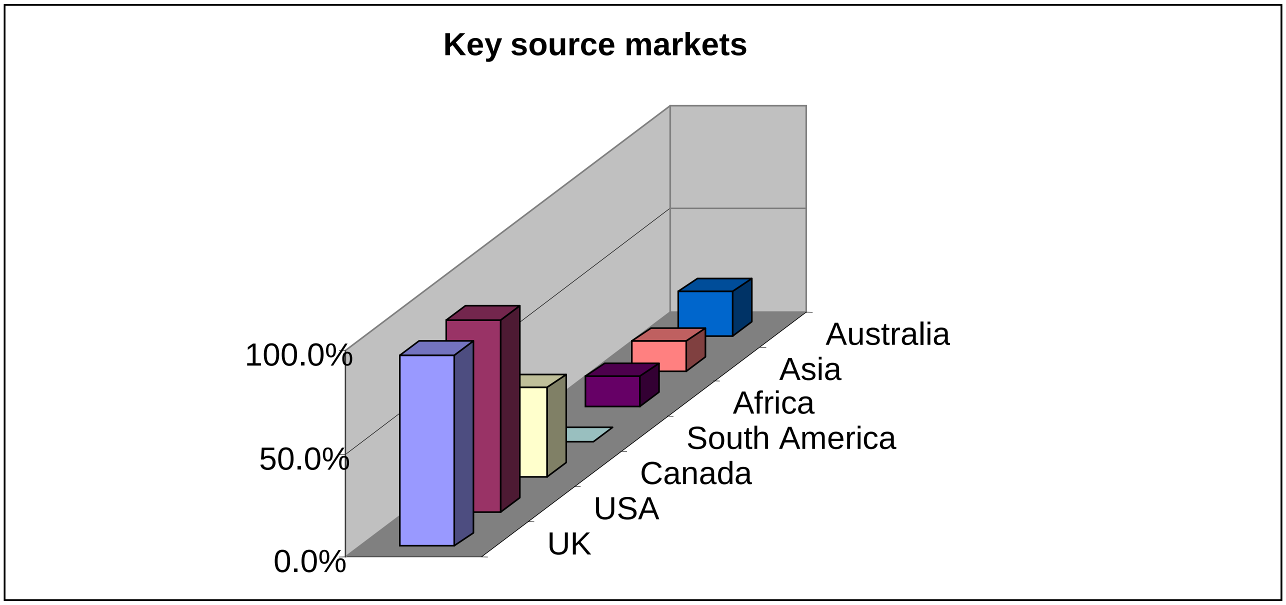
Source: survey

Figure: 3.8 Tour operator services

On the services offered by the tour operators, it appears that operators offer a variety of services depending on capacity and scale of operations, Figure 3.8 indicates that over 80% of tour operators develop, organise and conduct their own birding tours. Seventy one percent (71%) of bird guiding services and 57% flights and accommodation bookings.

None of the respondents have any form of horizontal or vertical linkages with a multi-national tourism global chain. This finding does not mean that none of the companies are global operators as there are local tour operators like Rock Jumper that offer tours in several countries worldwide (Marais, 2009). Based on interviews conducted, strategic linkages in tour companies shows that tour companies identify and contract local specialist bird guides at a particular destination (Marais, 2009). The guides primarily work as company staff on a tour remuneration basis and not on a company-to-company contractual basis (Marais, 2009).

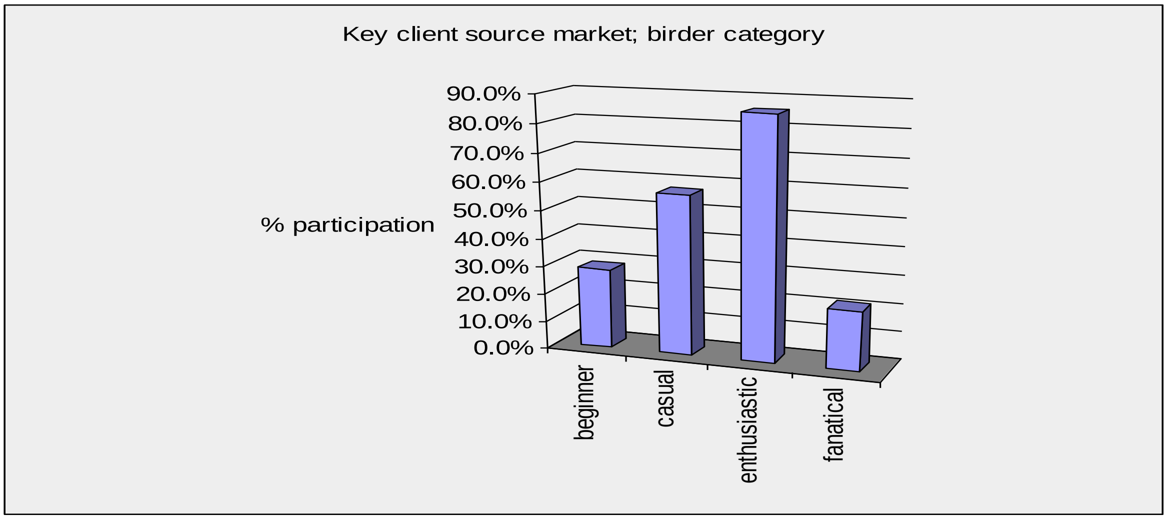
On the question of who the key source markets for bird watchers are, the United States of America, the United Kingdom and Canada in order of importance are the leading client base for the South African tour operators. According to Figure 3.9, Australia is significant with Asia and Africa at the bottom of the list.



Source: survey

Figure: 3.9 Key source markets

Previous surveys on the South African birders have shown that most local birders are committed or enthusiastic which concurs with that of local tour operators (Kaiser Associates et., al., 2009; the dti, 2010). Figure 3.10 indicates almost 80% of birding tour operator's clients is drawn from the enthusiastic or committed birder category. Surveyed tour operators confirmed that 78% of their client base is committed birders followed by casual birders at 45%. Since committed or enthusiastic birders are knowledgeable of species they want to see and the distribution of such species, it can be deduced that this segment requires advanced bird guiding skills from a specialist guide.



Source: survey

Figure: 3.10 major birding market category

3.3 Conclusion

It has been shown throughout the discussion in this chapter that for any form of birding tourism to emerge and grow, a well structured and sound institution that will champion the sector is critical. In this case, BirdLife South Africa through its network of communities of bird clubs and international partnerships is the champion for birding tourism development in South Africa. It has driven a range of activities and events that have popularised and inducted many into the bird watching hobby and created a critical mass that has nurtured sufficient demand for products and services for birders in South Africa. Birder Friendly Establishments, field guide publications, local bird guides and tour operators are some of the examples of businesses created through bird watching driven demand.

The next chapter will turns to the presentation on the profile of South African birders, their consumption patterns, preferences, participation at birding events, the resultant expenditure patterns of their involvement in the local birding industry and birding tourism's impact on the local tourism economy.

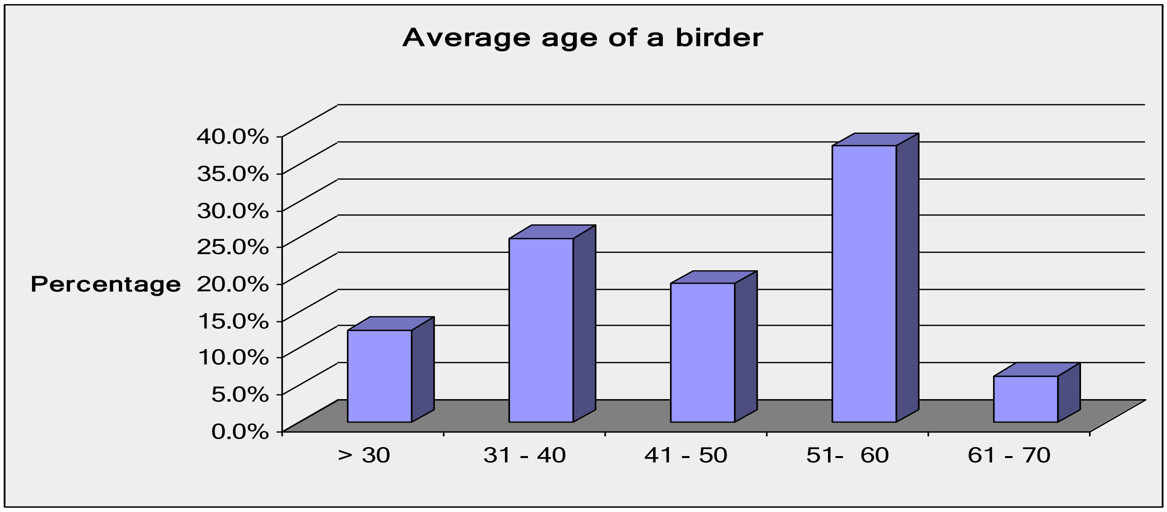
Chapter 4:

Profile of South African birders

This chapter presents the profile of local birders which includes their demographic profile, buying behaviour and patterns, participation at birding events, and the estimated economic impact of the birders involvement in the industry. The results that will be presented are based on a comprehensive survey on local bird watchers which was conducted between July and August 2010. The electronic survey was sent to various local online birding forums including the SA Bird Club Forum, Simply Birding Forum, Surfbirds Forum and the Bird Forum. Together these birding forums have over 100 000 members who communicate about birding related news, trip reports and other issues. A total of 48 responses were received and form the basis for this presentation. The results will also be compared to the recent birding studies conducted by Kaiser Associates et. al., (2009) and by the Department of Trade and Industry (the dti, 2010).

4.1 Demographic profile of South African bird watchers

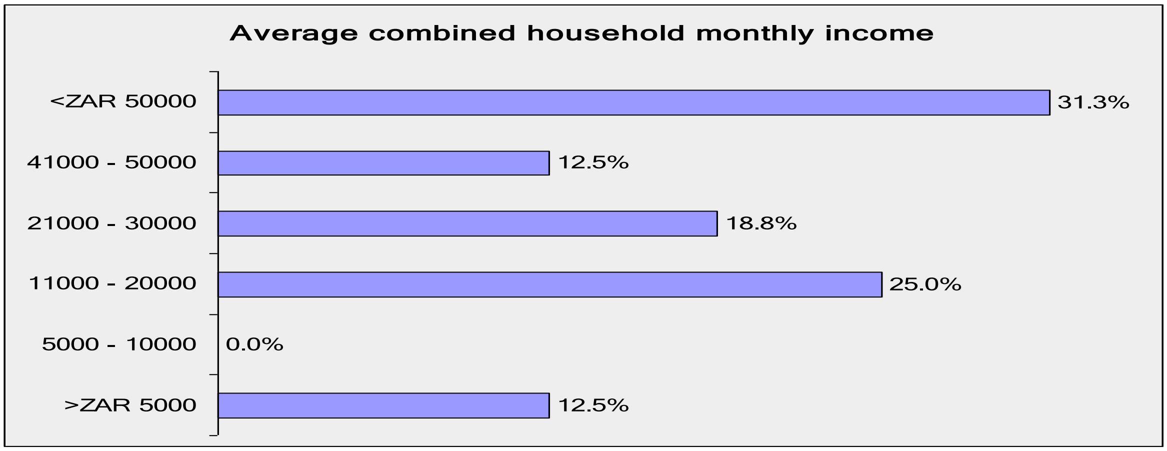
The average age of birder as shown in Figure 4.1 is in the range of 30 to mid 60's. There is a steep decline in numbers from 65 upwards due to the physical ability of the persons concerned given the hardship of hunting for birds in the wild. The low participation by people thirty and younger could be linked to the poor active bird watching youth programmes by BirdLife South Africa, family constraints and the lack of spare time and disposable income within the age group.



Source: survey

Figure: 4.1 Average age of a birder

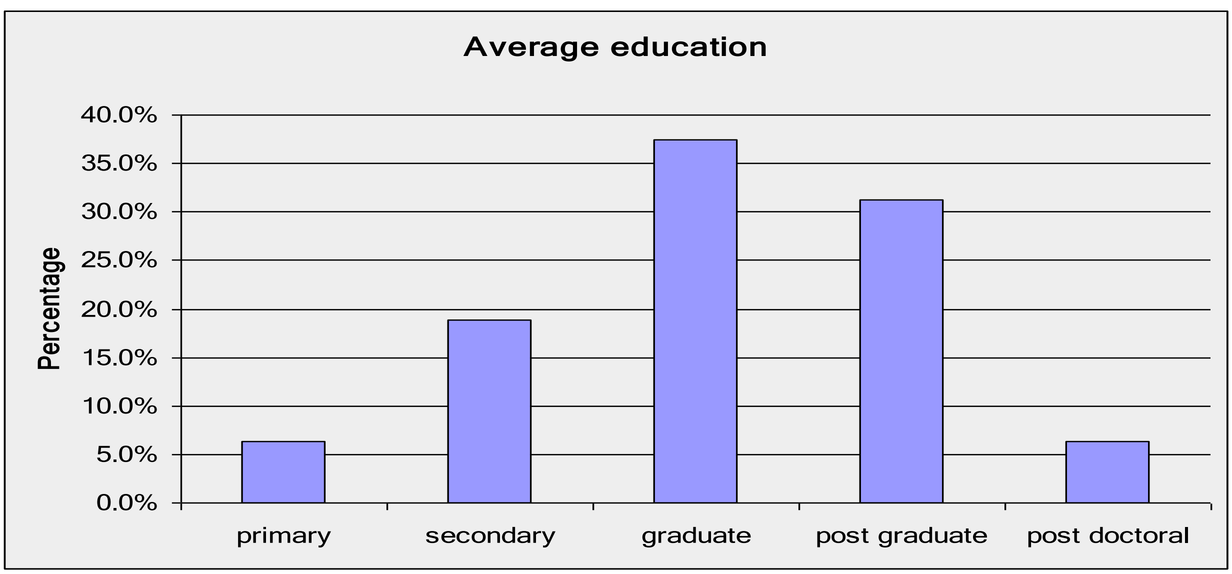
The survey has confirmed that birding is a sport for the wealthy with over 31% birders earning R50 000 and above per month. This result could explain why the mid fifties to sixties age group is the largest group of participating bird watchers as they have money, time and independence to pursue birding. The average combined household income for birders as shown in Figure 4.2 is between R20.000 and R50 000 per month with over 31% of surveyed birders earning above R50 000 per month.



Source: Survey

Figure: 4.2 Household income

As in the United States of America and the UK, the survey shows that South African birders are highly educated. Over 80% of local birders have a combined graduate (37%), post-graduate (32%) and post-doctoral education (7%). The education levels in South Africa are similar to global averages. The number of birders with graduate education is, however, the highest at 38% as shown in Figure 4.3 below.



Source: survey

Figure: 4.3 Highest education

In terms of gender split in participation in bird watching, the survey showed that there are more male birders (62%) than females 38% in South Africa. This is in line with a recent survey by the Department of Trade and Industry South Africa which found that 69% of active domestic birders are men and contrary to a 2001 survey in the United States of America which showed that women constituted the largest number of birders at 54% (FHWAR, 2001).

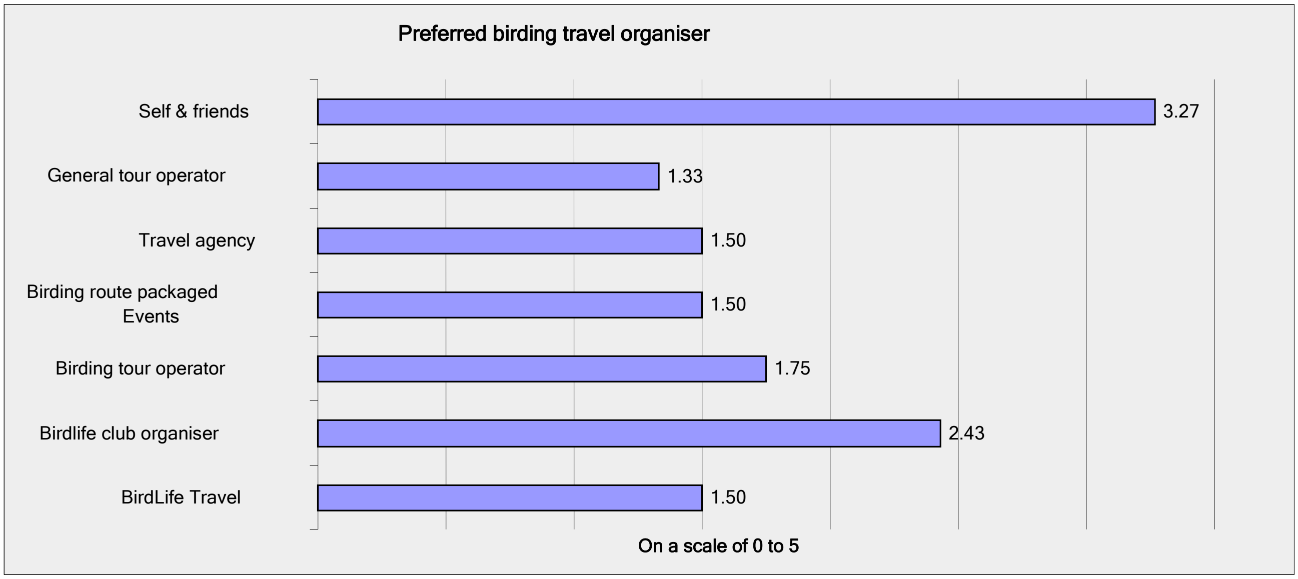
As discussed in Chapter 2, birders are classified according to four categories namely beginner, casual, committed and fanatic. In South African over 70% of birders classify themselves as enthusiastic or committed birders according to this survey. Casual birders hold second place with 12% followed by the beginner and fanatic categories of bird watchers with 7% each. The fact that the majority of local birders classify themselves as committed suggests that the existing birding community comprises of people who have been birding for over 10 years. These people's knowledge of birds is advanced and they know what birds they are looking for when out on a birding tour.

Unlike US birders who prefer to go birding with a spouse (FHWAR, 2001), South African birders prefer birding in groups. Local birders frequently go birding with fellow bird club members which are usually in a group of 5 to 20 people. There are very few birders who go birding alone and they usually go with a spouse and sometimes with smaller groups of 5 to 9 people. The culture of going out birding in groups is very important for tourism as it ensures that more domestic trips are taken often to less visited destinations and this increases tourism spend and geographic spread. This situation could explain the reason the local industry is said to be contributing about R2.2 billion per annum whilst there is only between 13 000 and 24000 local birders and even fewer international arrivals (the dti, 2010).

4.2 Birder purchasing preferences

As shown on Figure 4.4, local birders use a combination of travel organisers when planning a birding tour. Over 40 percent local birders organise their own birding travel outings whereas 25 percent attend birding outings organised by BirdLife South Africa Branch events organisers. Again this demonstrates the role BLSA plays in creating demand for the industry. Fifteen percent use bird tour operators and 10 percent rely on BirdLife Travel Agency services, travel agencies, birding route events packages and general tour operators.

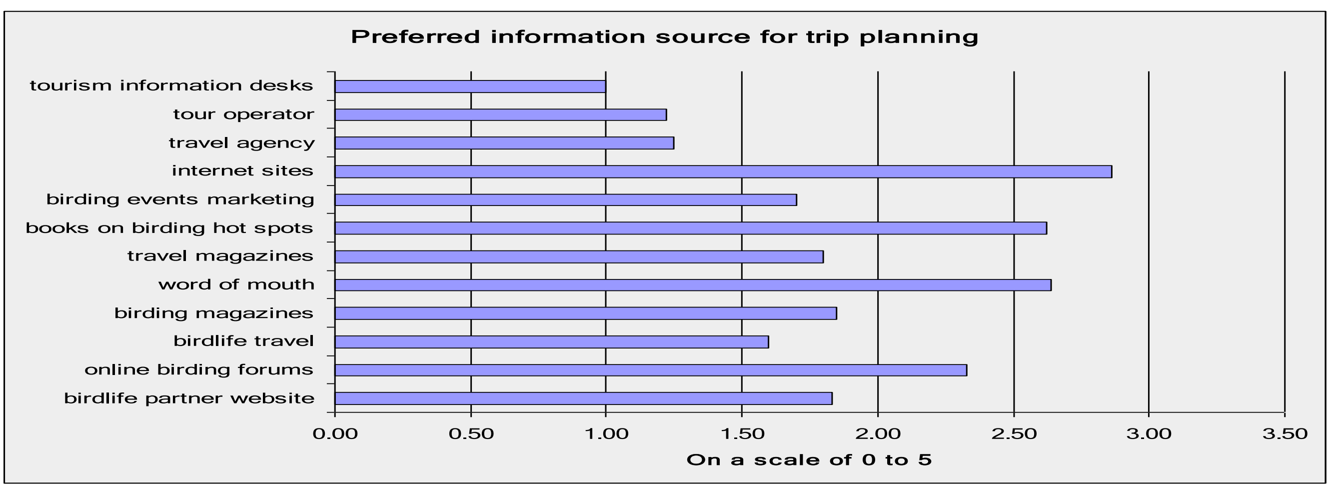
The finding that 40% of local birders organise their own birding trips shows a gap that exists in quantifying the most accurate number of trips taken by birders, spend and thus the overall economic input the industry makes in the economy. This is so because it not easy to trace individual organised birding trips but much easier to trace those which are organised by bird clubs and tour operators.



Source: Survey

Figure: 4.4 Preferred trip organiser

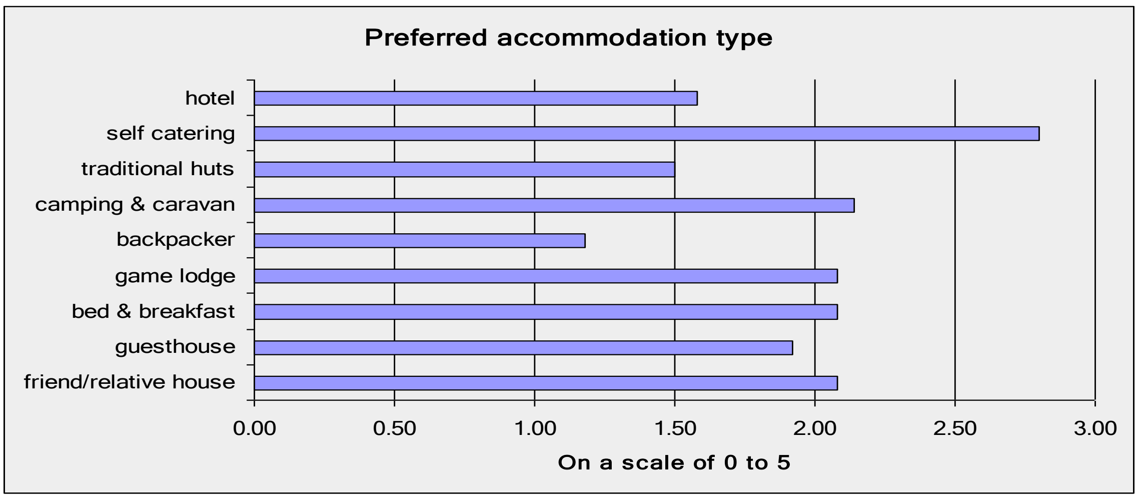
When organising birding trips, birders rely on a number of sources. Figure 4.5 shows the internet as the leading information source for local birders. This is followed by word of mouth from fellow birders, books and field guides on where to find bird species and online bird forums.



Source: Survey

Figure 4.5 Preferred birding information source

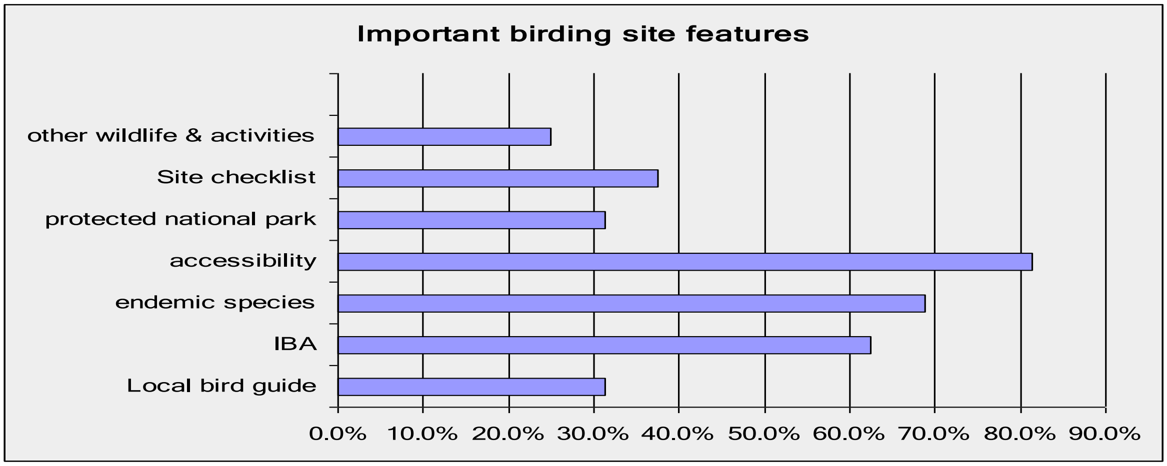
South African birders are generally low/budget accommodation users as indicated in Figure 4.6. Self-catering accommodation, camping and caravan, relative/friend house, bed & breakfast and game lodge facilities are, in order of preference, the most used by South African birders.



Source: survey

Figure: 4.6 Accommodation preferences

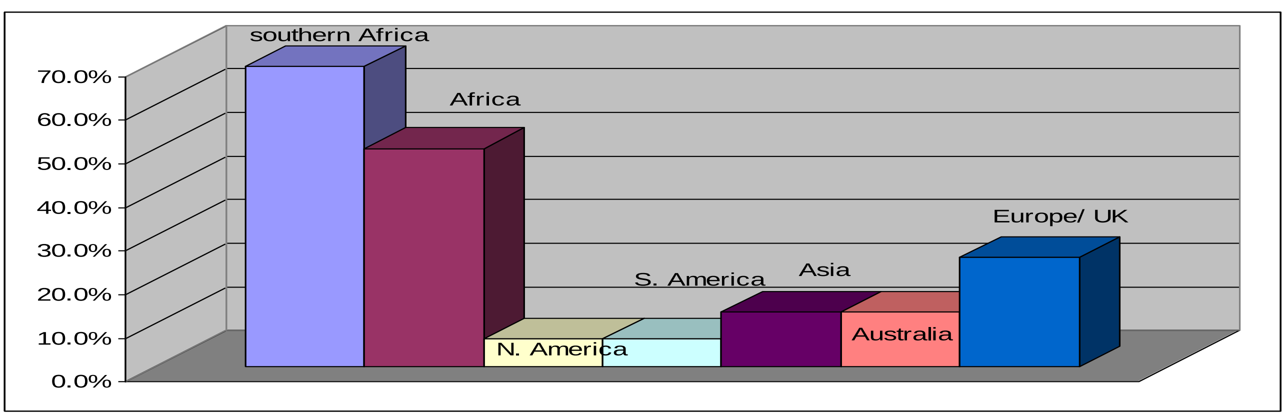
Accessibility of birding sites is a key enabling and top requirement for South African birders to choose a particular destination (Figure 4.7). Birders want to visit sites where there are good chances of seeing an endemic species and Important Bird Areas as they are in search of the uniqueness of the habitats and the species such places carry.



Source: survey

Figure: 4.7 Deciding features; birding location

Over 70% of South African birders have undertaken birding travel in southern Africa. The survey as depicted in Figure 4.8 shows that 52% of local birders have undertaken birding in the rest of Africa. Europe and the UK, Australia, Asia, South and North America have also been visited by some local birders. This is a clear indication that local birders are an important market for other birding destinations particularly in Africa and South America.



Source: survey

Figure: 4.8 Regions visited for birding purposes

The survey results show that the top five features that travelling birders look for when choosing a tour package are, proximity to a medical facility and airport, local arts and craft items, availability of tarred roads and picnic facilities. It is important to note that for the enthusiastic birding market, birding enrichment features such as game drives, bird hides, diverse fauna and flora rare endemic species scored considerably higher as compared to the five features mentioned above pointing to the market's fixation with listing of new species.

The most important technological items needed by travelling birders are personal digital Assistant with birding software to help with identification, a global positioning system (GPS), video recorder, cell phone and digital camera. Other items such as portable computers, ipod and digital scope are secondary but desirable. This finding is again a further indication of the market's emphasis on seeing more and more species than holidaying.

4. 3 Birder expenditure patterns

Bird watchers spend money on a variety of services and products in order to enhance their bird watching experience. These services range from gate fees for access at private and government run birding sites, accommodation, food and drinks, local bird guide fees, vehicle maintenance, fuel costs for transport to birding sites, birding equipment and a variety of other enabling services and products. Table 4.1 shows the average spend on these items per annum.

Category	Average spend per trip	Average trips per annum	Average total spend per annum
Gate entrance fees	R 15	23	R 350
Accommodation	R 400	11	R 4400
Local Bird Guide fees	R 300	17	R 5100
Transport costs	R 350	23	R 8050
Food and beverages	R 350	23	R 8050
Total	R 1415	31	R 25950

Source: survey

Table: 4.1 Average spend on birding trip services

Average accommodation spend per trip is at R400 with few birders spending R700 and above. This further confirms the birding community's preference for budget and self-catering accommodation as shown in Figure 4.6. Local bird guide fees per trip are R300 as shown in Table 4.1. Few people are willing to spend above R300 but there are birders that are willing to spend up to R700 for bird guiding services. The survey also disclosed that 44% of birders who do not spend on guide fees are independent (usually experienced birders) and prefer to go birding alone or to take a knowledgeable friend on a birding excursion.

In addition, active birding involves moving from one place to a site where the species occur. For fanatic birders, it has been shown that the distance between their place of residence and the birding location is not prohibitive as long as rare and special species occur there (Kaiser Associates et., al. 2009). Transport is a key enabler for away from home birding to take place. The survey has shown that birders spend an average of R350 on transport on a single birding trip. There was no kilometer or distance indicated by the survey question, this range is applicable to visits to local birding sites or sites within a 100 - 150 km return radius. There are also about 31% of surveyed birders who spend R700 transport costs for a return birding trip. This amount is for a weekend away birding at a destination 250 km away from place of residence. As indicated in Table 4.1, 48 percent of surveyed birders spend R350 on food and drinks on a weekend birding outing and 36 percent, R400 and 18 percent, R650. On average a birder spends R400 on food and beverages on a 3 day or weekend birding outing or roughly R135 per day.

Table 4.2 illustrates how much birders spend on other birding products and services such as binoculars, telescopes, video camera and bird feeders. The survey question asked birders to give estimate expenditure on certain items over a 3 year period. Average spend on a 3 year period by local birders on various birding products are shown in Table 4.2.

Category	Average spend per annum	Average total spend in 3 years
Binoculars	R 2000	R 6000
Bird feeders	R 500	R 1500
Club/society membership	R 425	R 1400
Video camera	R 2350	R 7000
Field & reference guides	R 425	R 1400
Magazines	R 425	R 1400
Total	R 6200	R 18600

Source: survey

Table: 4.2 Average spend on birding products

4.4 Birding events culture in South Africa

Table 4.3 shows the average number of times that South African birders attend certain birding events within a calendar year. The participation by South African birders on local birding events is the biggest demonstration of the value this niche market contributes to the tourism economy. As shown in Table 4.1 and 2, events create a lot of demand for other products and services which generate a lot of income for local businesses. On average a South African birder attends 31 birding events. These events range from 8 evening birding lectures, 7 day birding excursions, 5 weekend outing, 5 monitoring events, 5 organised birding tours and 1 promotional event on average. Each of the events has its own cost implications and according to the survey and as revealed on Table 4.3, a birder spends an average of R 20500 per annum on birding events.

Birding events	Average events attendance per annum	Average spend per annum
Evening birding lecture	8	R 2000
Day birding outings	7	R 2000
Weekend birding outings	5	R 3500
Bird monitoring outings	5	R 7000
Organised birding tours	5	R 4000
Birding Big Day	1	R 2000
Total	31	R 20500

Source: survey

Table: 4.3 Birding events attendance

4.4 Conclusion

The results from this investigation serve to confirm broadly the very findings which emerged from the dti (2010) and Kaiser Associates et. al., (2009). A number of key findings were, however, presented in this Chapter. First is the fact that of the estimated 40 000 active and potential birders in the country, a substantial population, 40%, organize their own birding tours. This result is critical because often the trips taken by these people are not included in economic calculations of the birding tourism's contribution to the economy meanwhile it contribute significantly local tourism industry economy. This factor needs to be considered when calculations for the overall value of birding tourism are made.

Secondly, linked to the organization of birding trips, the study has revealed that local birders prefer to go out birding in groups of between 5 to 20 people and these events are usually organized by a local bird club trip organizer. Besides making local bird clubs important tourism demand creators through planned annual birding outing schedules, the phenomenon of birding in groups increases the volumes of domestic trips and proportionally of much needed spend.

The third most important finding is the amount of events that are on average attended by birders per annum, estimated at 30 by the dti (2010) and by Kaiser Associates et. al., (2010). This survey with the dti (2010) and Kaiser Associate et., al., (2009) on the average number of events attended by a local birder in a year. The two studies have put attendance at 30 and the findings of this study are a total of 31 events attended. The study has gone further to separate non-traveling birding events and the ones that need travel. It has been found that a local birder attends 23 away from home birding events in a year. Such events are critical economically as they imply that expenditure will accrue on fuel, gate fees, accommodation, and local bird guiding fees as well as food and drinks. Average spend on each item per trip has been determined and shown as potentially important. By contrast there are events that need little travel like evening lectures and day local outings are often free and inject little into the economy.

Overall, the results presented in this chapter can inform a better understanding of birding tourism and of the estimation of the local birding industry contribution to the tourism economy, which is one of the fundamental research questions for this study. The concluding discussion in Chapter 5 will summarize all the chapters and offer analysis of key findings in line with the key research questions which form the context for this investigation.

Chapter 5:

Discussion and conclusion

The discussion in this chapter will focus and review key findings of the survey, interviews and the literature as they relate to the main research questions. The purpose of this study was to understand the evolution, structure and current supply and demand for birding tourism in South Africa. The aim was to trace the emergence or evolution of bird watching as a pastime and to unpack how this hobby was translated into an attractive birding or avitourism opportunity. The study further sought to define bird watching and avitourism, to understand the structure and organisation of the local birding industry and to determine the economic value made the birding industry to South Africa's tourism economy.

Three broad questions were asked; namely,

- What is birding tourism and who bird watchers or birders are?
- How is birding tourism organised or structured internationally and in South Africa; and
- What is the current value of this segment in the South African leisure market?

This concluding discussion will thus be structured according to the research questions starting with the profile of surveyed birders and comparisons to previous and international birders. The second component will briefly review the structure of birding tourism industry globally and in South Africa. Lastly, a summary of economic output by the birding tourism industry into the local economy will be undertaken.

5.1 Defining bird watching and avitourism

There is consensus amongst several analysts on the definition of bird watching and the avitourism concept. Overall, it is agreed that bird watching refers to the activity of observing wild birds in their natural environment (Kaiser Associates et. al., 2010). This activity includes watching birds in the garden but excludes watching captive birds. In line with the World Tourism Organisation's definition of a tourist, avitourism has been defined as travel away from usual place of residence to watch birds in their natural environment (the dti, 2010). This excludes travel for bird hunting.

5.2 Profile of South African birders

As regards the profile of birders, the study has revealed similar findings to other local and international studies. The majority of South African birders are highly educated with graduate, post- graduate and doctoral education. Most active birders are between the age of 51 and 60 years of age. It has also been confirmed that birding is an activity for the wealthy with over 32% birders earning above R50 000 per month. It is argued that this could explain why the mid fifties to sixties age group is the largest group of bird watchers as they have money and time to pursue this activity. In terms of accommodation preferences, local birders use mainly self- catering, camping and caravan accommodation, a finding similar to that discussed in the study by the dti (2010) and Kaiser Associates et. al., (2009).

Some important findings of the study are that unlike US birders who mainly go birding with a spouse (FHWAR, 2001), South African birders choose go out birding with fellow bird club members. The usual birding groups are 5 to 20 people. This finding has an important economic implication because it means more people go out birding implying increased spend.

Another significant finding is that in contrast to the US birders, there are more male birders (62) than females (38) in South Africa. Similarly, the dti (2010) study has found that there are more males than female birders with varying percentages, 71% males and 29% females. Again, the dti study (2010) has found that 84% of visiting international birders are males suggesting that even though there are more female (54) than males (46) in some international birding communities such as the USA (the second highest yield market for South Africa). The finding suggests that for some reasons, female birders do not travel overseas for birding as often as males do (FHWAR, 2001).

5.3 The Structure of bird watching in South Africa

The literature review and interview results have linked the emergence and growth of bird watching and the resultant birding or avitourism industry to a single organisation in South Africa which is, the southern African Ornithological Society (SAOS). Established in 1930 to undertake scientific study of wild birds and their habitats, the organisation increased birding awareness by building a network of over 50 birding communities across the country. The organisation was restructured and its name changed to Birdlife South Africa.

Over the years, the BirdLife South Africa has mobilised resources from the 1990's to date to build a network of birding sites. Importantly, this has resulted in eight birding routes which cover the largest part of South Africa established.

Bird watching and birding tourism is based on the generation of basic knowledge of birds, distribution across the country, and the development and distribution of such information to birders. BirdLife South Africa's various species and habitats research programmes have played a critical role as its nationwide network of birding routes provides a conduit for birding information distribution as well its website and online forums.

Another critical contribution of BirdLife South Africa to the bird watching and tourism industry is the initiation of birding events which are organised by its network of clubs and the eight birding routes' specific promotional events. The clubs and birding routes develop an annual schedule of events which are attended by birders in groups. These birders go away over weekends for birding purposes which generates tourism income through gate fees, local bird guide fees, accommodation and food and drinks. This practice has created a unique and important culture of local travel which is driven by the need to see new bird species.

5.4 The economic impact of bird watching to the tourism economy

The last research question for this study sought to determine the contribution of birding tourism to the local tourism economy. For the purposes of gauging the economic input of birding tourism, data was gathered through surveys that shows the birding activities and events which birders embark on in a year, their spend on accommodation, transport, lectures, guide fees, gate fees, birding services and equipment, and other birding related direct trip costs.

The analysis disclosed that a local birder attends an average of 31 events per year. If this number of events is multiplied by the estimated number of birders in South Africa (which is between 13000 and 24000), it amounts to approximately 403000 to 744000 domestic birding trips. Local birders spend an average of R 1415 per trip and when this amount is multiplied by the number of trips per birder per annum, it amounts to between R 570 million and R 1.050 billion in direct expenditure excluding indirect and induced input. Similar avitourism's expenditure estimates by the dti have put the size of the birding industry at between R927 million to R1, 725 billion annually. This includes birding trips, support services and equipment (the dti, 2009). Spend by International birders is estimated to be between R309 million and R618 million per annum in South Africa (the dti, 2010). In the final analysis the dti study also applied a conservative tourism multiplier effect of 1.3 and noted that avitourism contributes in the range of R1, 205 billion to R2, 243 billion to South Africa's GDP per annum (the dti, 2009). This makes birding tourism a valuable form of niche tourism for the South African economy.

A further economic input by birders is spending on birding services and products that enable birder to undertake bird watching comfortably. The survey has shown that a local birder spends an average of R 6200 per annum of birding field guides, camera and video, binoculars and other. This spend is on durable items and therefore do not happen every year for all birders. This figure could, therefore, be regarded as the average cost that a committed birder spends in order to become a birder.

5.5 Conclusion

In the final analysis, this research study has revealed that local birders spend in birding trips and services is between R570 million and R 1.050 billion (excluding equipment) and if this amount added with the international birding spend of between R 309 million and R618 million (the dti, 2010), the total local and international birding spend per annum ranges from R 809 million to R 1. 668 billion. This figure is within the spend range (R927 million to R1, 725 billion) released by the dti study (2009). It is therefore concluded that the dti study’s finding that local and international birding tourism contributes about R2.2 billion to the local economy is acceptable and in line with the findings of this study. As the national tourism industry contributed R195 billion in 2009, it is concluded that the local birding tourism contributes approximately 2% to the Gross Domestic Product. The promotion of birding tourism as an element of niche tourism development in South Africa is therefore justified.

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Appendix: A

List of people interviewed:

Name of interviewee	Position	Date of interview
Michael Blose	Manager; Zululand Birding Route	12 May 2009
Malcolm Drummond	Publisher and former Chairman of BirdLife South Africa	12 September 2009
Elliot Hazel	Manager; BirdLfe Travel	12 May 2009
Sadie Halbhuber	Manager; Events at BirdLife South Africa	24 September 2009
Etienne Marais	Owner Manager; Indicator Birding tour operator	4 March 2009
Nickki McCartney	Manager; Birder Friendly Establishments	11 May 2010
Bernhard Meyer	Director; Tourism Customised Sector Programme, Department of Trade and Industry	16 June 2010
Moeketsi Mosola	Former CEO; South African Tourism	12 October 2008
Duncan Pritchard	Former Divisional Manager; Avitourism, BLSA	9 May 2010
Sandra Ricketts	Admin manager; Lawson's Birding Tours	12 May 2009
L.A. Segura	Senior Guide; Indri Ultimate Mammal Voyages	11 May 2009
Martin Taylor	Head; Avitourism, BLSA	11 May 2010
Sakamuzi Mhlongo	Former manager; Zululand Birding Route	12 May 2009

Appendix: B

Questionnaire 1 : Birder Survey

A 1997 survey on birding in South Africa found that bird watching was contributing between R170 and R200 million to the country's economy (Turpie. J & Ryan, P. 1997). Thirteen years on, the supply side of the birding market has grown tremendously with over 5 functional birding routes across the country, over 200 trained local bird guides, a dedicated birding travel agency (Birdlife Travel) and over 50 "Birder Friendly Accommodation Establishments". Your participation in this survey will assist us to measure the demand side of bird watching by quantifying the current size of the local and international birding market and understanding the impact that birds and birding currently have on the South African economy. An MA student with the University of Witwatersrand's School of Geography, Archaeology and Environmental studies is conducting the survey.

A. About your birding activities

1. For how long ago did you start bird watching? ___________________
2. Do you keep bird lists? ______________________
3. What is your life list? _______________________
4. Where do you classify yourself amongst the following categories of birders? Tick the relevant box.

☐ Beginner ☐ Casual ☐ Enthusiastic ☐ Fanatical

5. Beside birding in your country/ continent, which other region/s of the world did you go to primarily for birding purposes?

Southern Africa ____________
USA ____________
South America ____________
North America ____________
Australia ____________
Asia ____________
Africa ____________
Europe/UK ____________

6. With how many people do usually go out birding? Tick relevant box/es.

Alone ☐ partner/spouse ☐ group of 4/5 ☐ group of 8

9 to 15 ☐ 15+ ☐ with bird club fellows ☐

7. How much have do you spend on average on each of the categories on a birding trip?

	R00 - R280	R350 – R450	R550 – R 650	R750 – R 850	>R1000
Gate fees	☐	☐	☐	☐	☐
Lodging	☐	☐	☐	☐	☐
Guide fees	☐	☐	☐	☐	☐
Transport	☐	☐	☐	☐	☐
Food & beverage	☐	☐	☐	☐	☐

8. How much have you spend in the following birding equipment in the past 3 years?

	R00 – R1400	R3500	R7000	R10500
Binoculars	☐	☐	☐	☐
Telescopes tripods	☐	☐	☐	☐
Recorders	☐	☐	☐	☐
Camera equipment	☐	☐	☐	☐
Bird books	☐	☐	☐	☐
Bird feeders	☐	☐	☐	☐
Magazines	☐	☐	☐	☐
Membership	☐	☐	☐	☐
Computer software	☐	☐	☐	☐
Video & tapes	☐	☐	☐	☐

9. What is your average trip spending on the following events and equipment?

	R00 – R2100	R2100 - 4500
Evening lecture	☐	☐
Day outing	☐	☐
Weekend outing	☐	☐
Ringing outing	☐	☐
Bird monitoring	☐	☐
organised tour	☐	☐
Bird ID course	☐	☐
Birding Big Day	☐	☐
Bird Fair	☐	☐

10. How many times in year do you attend the following birding activities?

	0 – 5 times	5 – 10 times	10 – 15 times	15+
Evening lecture	☐	☐	☐	☐
Day outing	☐	☐	☐	☐
Weekend outing	☐	☐	☐	☐
Ringing outing	☐	☐	☐	☐
Monitoring outing	☐	☐	☐	☐
Organised tour	☐	☐	☐	☐
Bird ID course	☐	☐	☐	☐
	☐	☐	☐	☐

Birding Big Day				
Bird Fair	☐	☐	☐	☐

11. What is your accommodation preference when out birding overnight?

	Never	Sometimes	Frequently	Always
Friends/relative	☐	☐	☐	☐
Guesthouse	☐	☐	☐	☐
B & B	☐	☐	☐	☐
Game Lodge	☐	☐	☐	☐
Self catering	☐	☐	☐	☐
Backpacker establishment	☐	☐	☐	☐
Camping & caravan	☐	☐	☐	☐
Village huts	☐	☐	☐	☐
Hotel	☐	☐	☐	☐

12. What are the most elements to you when selecting accommodation in a birding trip? 4 for extremely important and 1 least.

	1	2	3	4
Birder Friend establishment	☐	☐	☐	☐
Price	☐	☐	☐	☐
Star Graded establishment	☐	☐	☐	☐
On site bird guide	☐	☐	☐	☐
Self catering facility	☐	☐	☐	☐
Proximity to birding site	☐	☐	☐	☐

Flexible meals	☐	☐	☐	☐
Other (please specify)	☐	☐	☐	☐

13. How do you prefer to organize your birding outing and trips' travel and accommodation?

	Rarely	Sometimes	Frequently	Always
Birdlife Travel	☐	☐	☐	☐
Birdlife club organizer	☐	☐	☐	☐
Birding tour operator	☐	☐	☐	☐
Birding route package events	☐	☐	☐	☐
Travel agency	☐	☐	☐	☐
General tour operator	☐	☐	☐	☐
Other (please specify)	☐	☐	☐	☐

14. To what extent do you use the following sources of information when planning a birding trip locally or internationally?

	Never/rarely	Sometimes	Frequently	Always
BirdLife website	☐	☐	☐	☐
Online birding forums	☐	☐	☐	☐
BirdLife Travel	☐	☐	☐	☐
Birding magazines	☐	☐	☐	☐
Word of mouth	☐	☐	☐	☐
Travel magazines	☐	☐	☐	☐
Birding hot spots guides	☐	☐	☐	☐

Birding routes marketing	☐	☐	☐	☐
Sasol birding map	☐	☐	☐	☐
Internet sites	☐	☐	☐	☐
Tourism information desks	☐	☐	☐	☐

15. When selecting an overnight birding destination, how would you rate the following variables? 4 for extremely critical choice factor and 1 for the least,

	1	2	3	4
Number of species available	☐	☐	☐	☐
On site bird guide	☐	☐	☐	☐
High number of specials/rare	☐	☐	☐	☐
High number of endemics	☐	☐	☐	☐
Other wildlife/attractions	☐	☐	☐	☐
Possibility of birding on foot	☐	☐	☐	☐
Birding facilities, hides, information	☐	☐	☐	☐
Other (please specify)	☐	☐	☐	☐

16. Are you a member of BirdLife South Africa?

Yes ☐ No ☐

B. Personal information

17. How old are you? ………………..

18. What is your gender?

Male ☐ ☐ Female

19. Where do you normally live in?

Physical address ……………………………………………………………

Town…………………………. Province/state ………………………………
Country…………………………………….

20. What is your position within the business/company?

……………………………………………………………………………………………

21. What is your highest level of schooling?

☐ Primary ☐ Secondary ☐ Graduate ☐ post graduate ☐ ost doctoral

22. What is the combined monthly income of your household?

☐ Under 5 000 ☐ R20 K to R24 999

☐ R5000 to R9 999 ☐ R25 K to R39 999

☐ R10 K to R 19 999 ☐ R more than R40 K

The following space is provided for any additional comments that you may wish to make.

………
………
………
………
………
………
………
………………………………………………………………………………………

Thank you for your input in this survey, your assistance is greatly appreciated.

Appendix: C

Questionnaire 2: Tour Operator Survey

A 1997 survey on birding in South Africa found that bird watching was contributing between R170 and R200 million to the country's economy (Turpie. J & Ryan, P. 1997). Thirteen years on, the supply side of the birding market has grown tremendously with over 5 functional birding routes across the country, over 200 trained local bird guides, a dedicated birding travel agency (Birdlife Travel) and over 50 "Birder Friendly Accommodation Establishments". Your participation in this survey will assist us to measure the demand side of bird watching by quantifying the current size of the local and international birding market and understanding the impact that birds and birding currently have on the South African economy. An MA student with the University of Witwatersrand's School of Geography, Archaeology and Environmental studies is conducting the survey.

A. Target market/ birder information

1. What is your company's target market amongst the following categories of birders?

☐ Beginner ☐ Casual ☐ Enthusiastic ☐ Fanatical

2. How many years has your company been in operation? (Tick relevant box)

1 to 5 yrs ☐
6 to 10 yrs ☐
11 to 15 yrs ☐
16 to 20 yrs ☐
21 to 25 yrs ☐

3. Are you part of an international travel agency or operator chain? If yes identify it

____

4. Approximately how many bird watching tourists did your company have in the last year? (Tick relevant box)

50 to 100 ☐
101 to 150 ☐
151 to 250 ☐
251 to 300 ☐
301 and above ☐

5. What are your company's key source markets for your tours?

- ☐ UK
- ☐ USA
- ☐ Canada
- ☐ South America
- ☐ Africa
- ☐ Asia
- ☐ Australia

6. Please rank your source markets in order of volumes of tours generated? Rating is from 1 to 5 with the highest mark for the best performer.

Source market	Ranking
United Kingdom and Europe	
USA	
South America	
Asia	
Australia	
Africa	
Canada	

7. What services does your company provide bird watchers?

Please tick the boxes that apply:

- ☐ Local Bird Guide services
- ☐ Booking services for other bird watching tour companies
- ☐ Own and/or operate accommodation for bird watchers
- ☐ Develop, organize and guide bird watching tours
- ☐ Flights to & from a bird watching destination
- ☐ Internal flights and transfers within a bird watching destination
- ☐ Own and/or possess exclusive rights to access a bird habitat
- ☐ Other, please specify

8. What is the average length of stay for your clients?

1 to 5 nights ☐

5 to 10 nights ☐

11 to 14 nights ☐

15 to 21 nights ☐

21 and above ☐

9. To what extent do you depend on the following information and communication methods and technologies for your business operations? Tick relevant box/es.

ICT method	Never/ rarely	sometimes	frequently	Always
Personal contact				
Web page/internet				
Word of mouth				
Mobile phone				
Land line telephone				
Fax				
Written letters via the postal service				
On line banking and payment services				
Email				
Other, specify				

10. How important are the following technologies to your clients use while on tour? Tick relevant box/es.

Technologies	Never/ rarely	sometimes	frequently	Always
Digital Camera to photograph birds				
Portable computer (tablet/laptop)				
Global Positioning System to record location of sightings				
cellular phone				
Personal Digital Assistant to access emails, phone calls and SMS Satellite phone				
iPod loaded with bird songs				
Video recorder/ camcorder to film				
Video capable iPod to play audio visual field guide				
Personal Digital Assistant (e.g. palm pilot) interactive field guide				
Dig scope for close up viewing and photography				
Other, please specify				

B. Birding destination/site features

11. Do your clients like to participate in the following activities while on your birding tours? Tick the relevant box/es.

	Never/rarely	Sometimes	Frequently	Always
Photography	☐	☐	☐	☐
Swimming	☐	☐	☐	☐
Museum	☐	☐	☐	☐
Fishing	☐	☐	☐	☐
Boating/canoeing	☐	☐	☐	☐
Golfing	☐	☐	☐	☐

Shopping	☐	☐	☐	☐

12. When you make your decision about where to stay for your bird watching tours, do you consider following standard and birder friendly accommodation requirements?

	Not important	Slightly mportant	Very Important	Must have
Self catering facilities	☐	☐	☐	☐
Hot water for washing	☐	☐	☐	☐
Space for privacy	☐	☐	☐	☐
Local cuisine	☐	☐	☐	☐
Electricity connection	☐	☐	☐	☐
Safe drinking water	☐	☐	☐	☐
Familiar food	☐	☐	☐	☐
Sewerage/ toilet system	☐	☐	☐	☐
Localbirdguides	☐	☐	☐	☐
Comfortable bed	☐	☐	☐	☐
Mobile phone reception	☐	☐	☐	☐
Internet connection	☐	☐	☐	☐
Rubbish removal	☐	☐	☐	☐
Local arts & crafts	☐	☐	☐	☐
Flexible meal times	☐	☐	☐	☐
Birding field guides	☐	☐	☐	☐
Binoculars	☐	☐	☐	☐
Tranquil environment	☐	☐	☐	☐

13. When you make the decision about which place to use as your birding destination, how important are the following?

	Not important	Slightly mportant	Very Important	Must have
Hotel accommodation	☐	☐	☐	☐
rare & endemic bird species	☐	☐	☐	☐
diversity of fauna & flora	☐	☐	☐	☐
Landscape features	☐	☐	☐	☐
Self guided tour	☐	☐	☐	☐
Guide gamed drive	☐	☐	☐	☐
Walking trails	☐	☐	☐	☐
Eating facilities	☐	☐	☐	☐
Picnic facilities	☐	☐	☐	☐
On site guides/rangers	☐	☐	☐	☐
Signs identifying plants	☐	☐	☐	☐
Huts/cottages, camp	☐	☐	☐	☐
Bird hides	☐	☐	☐	☐
Local arts & crafts	☐	☐	☐	☐
The site has tarred roads	☐	☐	☐	☐
Hospital within 2 hours drive	☐	☐	☐	☐
Reliable telecommunications	☐	☐	☐	☐
Airport is within 4 hours drive	☐	☐	☐	☐

C: Company information

14. What is the name of your company? ……………………………….

15. In which City or state are based? …………………………………..

16. Where do you normally live in?

Physical address ………………………………………………………………

Town…………………………. Province/state ………………………………
Country…………………………………….

The following space is provided for any additional comments that you may wish to make.

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Thank you for your input in this project.