



# BIRDWATCHING TOURISM

*Birdwatching is a major component of wildlife tourism and is one of the most rapidly growing pastimes in the Western world. Significant numbers of inbound tourists visiting Australia do so in part or primarily to watch birds. Although the economic, recreational and social significance of birdwatching has been recognised elsewhere, there is little information about this form of recreation or its importance within tourism in Australia.*

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In Australia, as in many countries, the number of businesses providing specialist birdwatching or including such activities within their itineraries has increased significantly this decade. There are many opportunities for the development and expansion of the birdwatching industry in Australia and the development of the number of potential excellent birdwatching sites.

## About the Study

In 2002, Tourism Queensland conducted a review of current research to gain a better understanding of the birdwatching tourism market.

The specific objectives of this study were to:

- Develop a market profile on the birdwatching tourism sector in Queensland;
- Provide information on what birdwatchers want and how they want it;
- Identify any product gaps; and
- Identify core issues that confront both the operation and development of tourism businesses targeting the birdwatching market.

## Market Insight

- Birdwatching is a serious and passionate recreational activity for a significant number of people in many (mainly Western) countries.<sup>1</sup>
- Birdwatching is an activity that is greatly enhanced and enriched by travel. Indeed, for all but novice birdwatchers, travel away from home is an essential pastime, as to see new birds, one must travel to new places.<sup>1</sup>
- Among the millions of tourists visiting Australia each year are large numbers who regard the opportunity to bird watch as either being an enhancement to their experience or as a major reason for their visit to Australia.<sup>1</sup>
- Birdwatchers tend to have strong learning motivation, are generally interested in other wildlife, are keen to see as many new species as possible and seek bird rich sites.<sup>2</sup>
- Birdwatchers tend to do considerable background planning before their trip. They are strong users of the Internet and birding networks for information.<sup>2</sup>
- For many birdwatching tourists, the primary objective is to see the largest number of new or different species in the most cost-effective manner.<sup>1</sup>
- Far North Queensland is by far Australia's premier birdwatching tourist destination. It has the largest number of private and organisational bird guides and more birding-oriented lodges and other establishments than any other region in Australia. Among all visitors to North Queensland about 20 percent have engaged in birdwatching (approximately 400,000 visitors).<sup>1</sup>

## Type of Experience Sought<sup>1</sup>

Birdwatching is concerned with an intimate natural connection with wild birds and involves some level of learning and/or experience.

## Motivations<sup>1</sup>

Birdwatchers are motivated by a combination of factors, primarily *achievement* and *appreciation*. **Achievement** involves competition or performance as key motivators. **Appreciation** is where participants seek stress reduction, a sense of peace, belonging and familiarity through their involvement. Most birdwatchers maintain each of these motivations, although the importance of each varies depending on whether the birdwatcher is a casual, novice, intermediate or advanced.

## Locations<sup>1</sup>

Birdwatchers travel specifically to see birds and are therefore attracted to locations where either the biodiversity (ie large numbers of species) or the chance to see particular species is high. They do not typically travel to places of unknown birding status.

## Categories<sup>1</sup>

Birdwatching tourists in Australia can be classified into the following categories: *general birdwatchers*, *specialist birdwatchers with restricted budgets*, *specialist birdwatchers willing to pay to see more birds* and *specialist birdwatchers requiring packaged birding*.

**General birdwatchers** are casual or low-motivation birdwatchers who are likely to be equally interested in pursuing other forms of nature tourism and outdoor recreation while on holidays. Tourists in this category would be unlikely to participate in a specialist birdwatching trip but would be among the keenest participants in a group wildlife tourism experience. Birds may be a highlight or bonus to these travellers. General birdwatchers typically travel in family parties, so some participants may have subsumed their private birdwatching aspirations to participate in more family oriented activities.

**Specialist birdwatchers with restricted budgets** includes moderately to highly motivated birdwatchers who are seriously constrained in their activities by financial resources. They are often young singles or couples travelling independently. They are generally well-informed and may be quite adept at stretching their limited budget. They may hire a car and stay in hotels, but these tend to be the cheapest available and for limited durations. They are unlikely to use specialist guides or spend large amounts on specialist birding products. They are, however, committed to their birdwatching experience and they have fewer time constraints, which can mean that their overall economic contribution is higher than that of more affluent travellers.

**Specialist birdwatchers willing to pay to see more birds** are usually interested in time-efficient birding and do not have the financial constraints of the previous category. People in this category seek to minimise all non-essential non-birding time. They are generally willing to pay a reasonable price for specific birding objectives and some may be willing to substitute some comforts for more birds. Most, however will expect a reasonable standard of accommodation and travel comfort. These tourists are most likely to seek out and hire specialist guides and to join birding tour groups. They are well informed and will make decisions on products based on considerable research. They are likely to be less critical of the non-birding aspects of their experience providing the birding meets their expectations.

**Specialist birdwatchers requiring packaged birding** tends to include both the well-off and the “insecure”. These people seek a very efficient birding experience with the guidance of well-trained and specialised guides. They generally expect high standards of accommodation and travel comforts along with reasonably personalised treatment.

## Activities<sup>1</sup>

Activities undertaken by birdwatchers include:

- Half day, full day tours;
- Accommodated (or camping) tours;
- Guided tours (by an ornithologist tour guide – someone who is skilled in ornithology and can describe birds);
- Photography;
- Bird walks;
- Birdwatching (identification of bird species);
- Customised tours;
- Bird counts.

**Detection:** Apart from special situations, such as those involving captive animals or where free-ranging birds are attracted to viewing sites, most birdwatching tourism requires the detection of species living wild in their natural environments. Particularly valued sites are those where large numbers of species may be detected easily and predictably.

**Identification:** A primary skill of any birdwatcher is the identification of species. This activity clearly distinguishes a birdwatcher from a more general ‘nature lover’ – applying a specific name to a bird detected in its natural habitat is possibly the most important component of the experience. Thus, situations where all or most participants cannot view the birds adequately to allow reliable identification will often be regarded as unsatisfactory.

**Observation:** For certain birdwatchers, detection and identification are entirely sufficient; once all possible species have been ‘ticked’, it is time to move on to the next location. For others, however, these activities are preferably followed by more prolonged observation of the birds. Other, more focused activities may include photography, audio recording and even artwork, although such activities are relatively rare among most birdwatching groups.

## Accommodation Preferences

Qualitative research suggests that ‘dedicated birdwatching groups’ would probably avoid higher class accommodation in order to ‘get right among it’ and camp or sleep rough. It is important to note, however, that birdwatchers purchasing expensive packages will obviously expect an appropriate quality of room and food. Birdwatching tourism operators also indicate that the less committed market enjoy quality accommodation facilities when travelling to undertake birdwatching.<sup>3</sup>

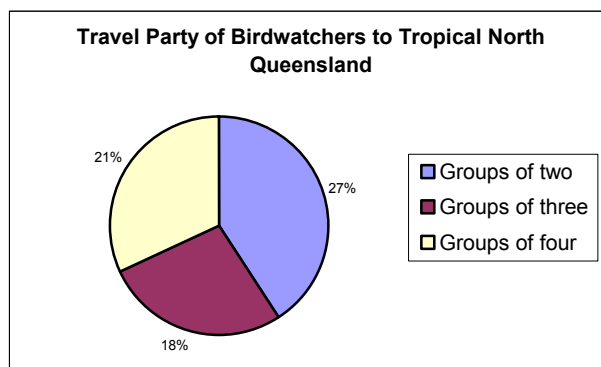
Large numbers of birdwatchers are reported to be visiting friends and relatives (VFR) and many are willing to offer accommodation to others interested in the activity whether or not they have personally met them.

**Accommodation Used<sup>4</sup>**

ACCOMMODATION TYPE	% OF RESPONDENTS
Camping/Caravan Park	70%
Hotel/Motel	55%
Lodge/Bed and Breakfast	42%
Friends/Relatives House	36%
Guest House	27%
Resort	15%
Hostel	9%
Other	9%

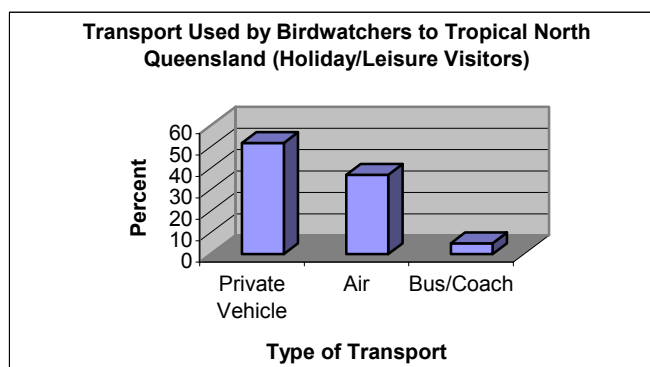
## Travel Party<sup>3</sup>

Birding operators report that birdwatchers generally undertake the activity by themselves or with one other person (usually their spouse or partner). While larger groups (of usually 10 people maximum) do go birdwatching, their occurrence is somewhat rare. This can be attributed to the nature of the activity, as large groups of people exploring delicate natural environments for bird species are likely to scare birds away



## Transport

Many birdwatchers utilise a private vehicle on their travels.<sup>5</sup>



## Information Sources<sup>3</sup>

Birdwatchers are more likely to research their travel in great detail than other categories of tourist. Information is obtained from a variety of sources that are perceived to be reliable, including word-of-mouth from knowledgeable friends and the established networks of other birdwatchers.

Birdwatchers seek and utilise interpretive materials and expect it to be of high quality and informative. High standards are generally expected in terms of both presentation and content.

## Demographic Profile<sup>3</sup>

DEMOGRAPHIC	AUSTRALIAN TOURIST PROFILE
<b>Age</b>	Birdwatchers tend to be in the older age groups (people over 40 years dominated the birdwatching tourists in North Queensland).
<b>Occupation</b>	Birdwatchers tend to be employed in professional occupations and almost 40% of Australian birdwatchers had achieved degree level education or greater.
<b>Income</b>	As birdwatchers are generally highly affluent and highly educated, a high percentage tend to earn an annual household income of over \$60,000.
<b>Lifecycle</b>	Birdwatchers tend to be couples without children or empty nesters.

DEMOGRAPHIC	INTERNATIONAL TOURIST PROFILE
<b>Age</b>	The international markets are generally older, but include a broader range of ages than the domestic birdwatching market.
<b>Occupation</b>	As with the Australian market, international birdwatchers tend to be highly educated and affluent, however, as with age, there is a broader range of occupations and incomes than the Australian market. Almost 75% of USA birdwatchers had achieved degree level education or greater.
<b>Extra-Curricular Activities</b>	Most international birdwatchers are likely to be members of their local birdwatching clubs.
<b>Origin</b>	The major international source markets are reported to be the United Kingdom, Other Europe and the United States.

## Barriers<sup>1</sup>

- A major obstacle to the development of the birdwatching industry in Australia is the bureaucracy and costs associated with obtaining permits and permission. It is possible that some regulating bodies are unaware of the extent to which these requirements are constraining the industry.
- The Australian landmass is an entire continent and travel from place to place often requires significant amounts of time. This is especially a feature of birdwatching tourism where the key locations are frequently well away from the capital cities. Thus, visits to such places typically require extensive driving times from the main destinations used on flying itineraries. Moreover, different birding sites are often widely spaced and visits to more than one such location may necessitate multiple journeys to and from the major centres.
- There is also the issue of birdwatching guides and products. While the majority of guides and products are professional, personal and well presented, there are those that do not conform well to international standards. In the contemporary, word-of-mouth and Internet networks in which many birdwatching tourists are involved, experiences of incompetence, uncomfortable accommodation, overused sites, unethical practices and poorly prepared guides spread widely and quickly.
- Despite the proliferation of guides, birding companies, birding lodges and birding tours in some locations, there remain many locations and entire regions where very few facilities are available. Indeed, there are currently two contrasting characteristics of the industry in Australia, the oversupply of products (primarily guides) in a small number of locations, and the complete absence of these in others. In practice, it is the latter that represents a major constraint to the birdwatching industry in Australia.
- Although it might be assumed that birdwatching would be an extremely low-impact form of recreation, it is now evident that some activities can have serious negative environmental effects. Virtually every form of recreational activity has been shown to adversely effect wildlife to some extent, though the significance of the disturbance varies greatly among species and situations.
- There are many clear situations where disturbance is directly and clearly related to reduced survival or reproduction of particular species. Some such situations concern nesting birds of prey, colonial seabirds, and solitary beach-nesting shorebirds, as well as gulls and raptors during migration. The breeding success of these species is known to be affected by close approaches of people and many countries are currently discussing regulations to minimise disturbance.

## Opportunities<sup>1</sup>

- About 8 percent of the world's bird species occur in Australia. While the 800+ bird species in Australia is lower than in many other regions, the key strength is the high level of endemic birds. Australia has over 330 species that can be seen nowhere else, which is a key drawcard for those seeking to see new birds in new places.
- Australia is the best place to see the largest number of species of megapodes, cockatoos, owl-nightjars, Australo-Papuan warblers, honeyeaters, Australasian robins, whipbirds, quailthrushes, bowerbirds and woodswallows. Australia is also particularly rich in albatrosses, petrels, shearwaters, cormorants, buttonquails, oystercatchers, plovers, pigeons, parrots, kingfishers and monarch flycatchers.

There are many opportunities for the development and expansion of the birdwatching industry in Australia.

**Promotion:** At present, almost all the information obtained by prospective birdwatching tourists comes from a small number of published sources, contacts with ornithological organisations and websites, and via the vast informal networks that exist among birdwatchers worldwide. Although this is starting, birdwatching operators need to promote themselves and their products more effectively. This will involve, in part, the careful design of useful websites and frequent updating with relevant information.

**Events:** Australia hosts remarkably few ornithological events – larger scale, organised meetings, camp-outs, conferences and conventions, where birdwatchers can meet, exchange ideas and news,

and participate in birdwatching experiences. The opportunities for more such ventures are enormous but will be best for the industry if carefully coordinated.

**Cooperative Ventures:** Currently, there appears to be very little cooperation among birdwatching guides and operators. An obvious opportunity for the industry in common areas would be the formation of local alliances that would allow more efficient promotion and expansion of products.

**New Locations:** In terms of the number of potential excellent birdwatching sites, Australian birdwatching tourism has enormous potential for expansion.

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- 1 Birdwatching Tourism in Australia, CRC Tourism Research Report, 2001.
  - 2 Birdwatching Tourism, South Australian Tourism Commission, April 2001.
  - 3 Tropical North Queensland Birdwatching Report, QTTC, May 1998.
  - 4 QTTC Birding-Aus Internet Survey, 1998.
  - 5 National Visitors Survey, Bureau of Tourism Research, 2000.

### **Further Information**

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