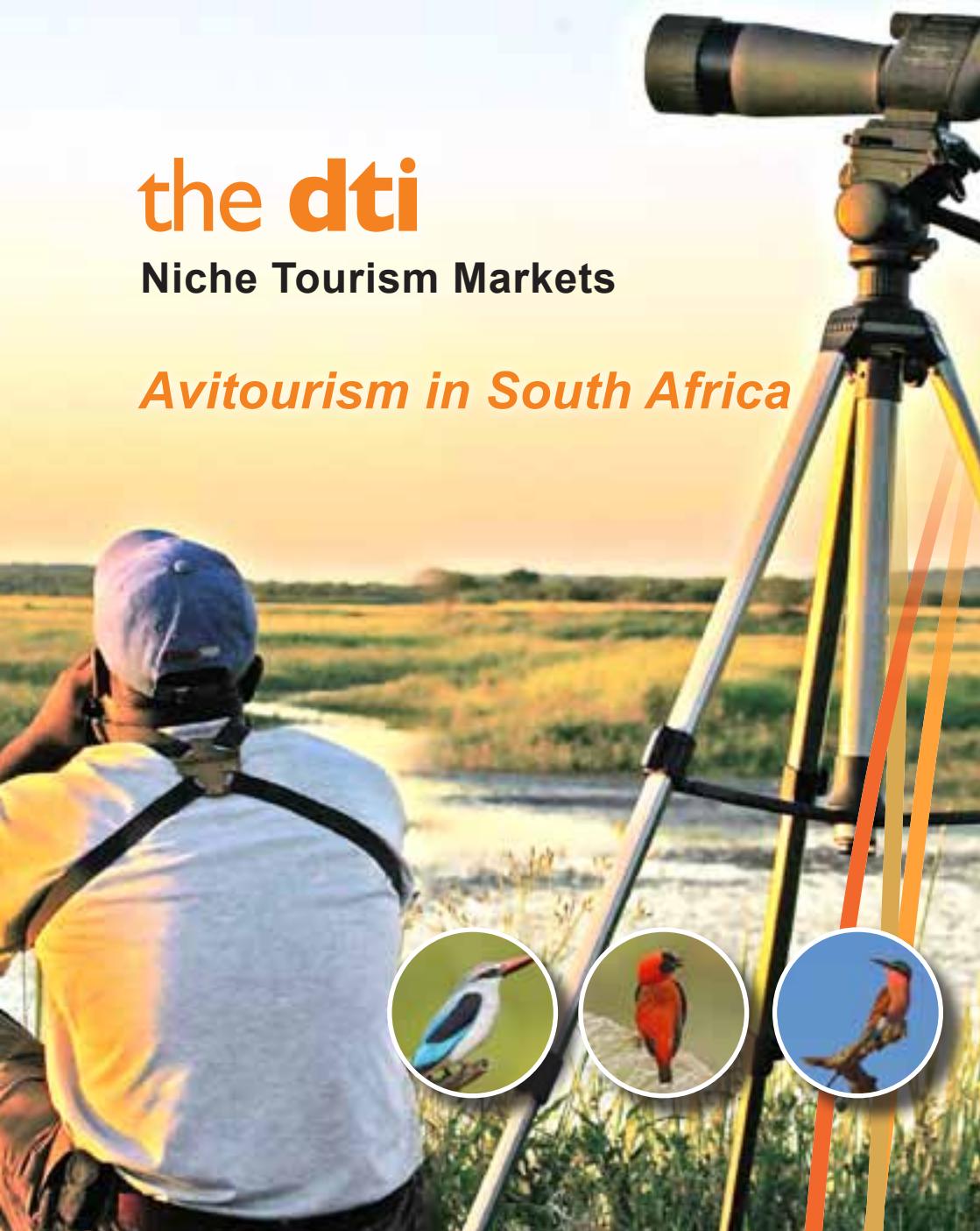


the dti

Niche Tourism Markets

Avitourism in South Africa



the dti

Department:
Trade and Industry
REPUBLIC OF SOUTH AFRICA



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Contents

Abbreviations and Acronyms	4
Glossary	5
Foreword	6
Introduction.....	8
What is Avitourism?.....	12
Why Avitourism?	16
Avitourists: Behaviour and Preferences	24
Avitourism Locations and Hotspots	30
Avitourism Activities and Services	36
Opportunities in Avitourism.....	40
Case Studies of Successful Avitourism Businesses.....	46
Sources of Assistance for Avitourism Activities	50
Industry Contact Details	51

Abbreviations and Acronyms

ASATA	Association of Southern African Travel Agents
B-BBEE	Broad-Based Black Economic Empowerment
BirdLife SA	BirdLife South Africa
FEDHASA	Federated Hospitality Association of South Africa
GDP	Gross Domestic Product
IBAs	Important Bird Areas
IDC	Industrial Development Corporation
IDD	Industrial Development Division
IPAP 2	Industrial Policy Action Plan 2010/11 – 2012/13
Khula	Khula Enterprise Finance Ltd
LSM	Living Standards Measure
NDT	National Department of Tourism
NEF	National Empowerment Fund
PDI	Previously Disadvantaged Individual
SANParks	South African National Parks
SAT	South African Tourism
SATSA	Southern African Tourism Services Association
Seda	Small Enterprise Development Agency
SMMEs	Small, Medium and Micro-sized Enterprises
TEP	Tourism Enterprise Programme
the dti	Department of Trade and Industry
THETA	Tourism, Hospitality, Sport Education and Training Authority

Glossary

Avitourism	This niche tourism market is one in which the tourist undertakes overnight travel outside of his/her usual environment to view birds in their natural habitat.
Boardwalks	These are wooden paths for pedestrians and vehicles, commonly found in wetlands, coastal dunes and other sensitive areas. Within the context of avitourism, boardwalks provide access and prevent damage to sensitive areas popular among birders.
Bird-watching or Birding	This activity refers to the observation and study of birds with the naked eye or through a visual enhancement device like binoculars, mainly for recreational reasons.
Congregation	This is a socially-induced cluster of birds, for the purpose of mating, for example.
Domestic avitourists	These are South African residents who travel within the country to participate in birding activities.
Endemic birds	These are birds restricted to a particular geographic area.
Endemic bird areas	These are areas that are home to at least two endemic bird species.
Important Bird Areas (IBAs)	These are areas identified by BirdLife International as priority conservation sites for bird life.
International avitourists	These are residents of foreign countries who participate in bird-watching activities while visiting South Africa.
Life list	This is a list of birds observed by a birder over his lifetime.
Migrant	Within the context of avitourism, a migrant is a bird that moves seasonally from one location to another.
Nature-based tourism	Nature-based tourism takes place mainly in natural environments, with the specific purpose of viewing and experiencing the natural features of a destination.
Ornithology	This is a formal study of birds, using formal scientific methods.
Pelagic birds	These are birds that inhabit the open sea, returning to the shore only to breed.
Rarity	Within the context of ornithology, this refers to a bird species that is seldom recorded in a particular region.
Ticker	This term is used to describe a birder whose primary goal is to compile a life list.
Twitcher	This is a birder who travels long distances to view rare birds.
Vagrant	Within the context of avitourism, a vagrant is an individual bird observed in a particular region, which lies outside of the range known for harbouring this species.

Foreword by the Deputy Director-General, Industrial Development Division



It is widely recognised that the tourism sector is one of the most significant contributors to export earnings in the South African economy. It is estimated that tourism's economic contribution represents approximately 8% of the country's gross domestic product (GDP), while the sector employs almost one million people, both directly and indirectly. As such, it has been identified as one of the key industries with the potential to accelerate economic growth in South Africa.¹ The Tourism Directorate of the Department of Trade and Industry's (**the dti's**) Industrial Development Division (IDD), recognised the important role that niche

tourism can play in this regard, and has included niche tourism development as a key tourism project in **the dti's** Industrial Policy Action Plan 2010/11 – 2012/13 (IPAP 2).

the dti's focus on niche tourism development, as an effective strategy to improve South Africa's competitiveness in the tourism sector, forms part of government's broader efforts in this regard, and complements the National Department of Tourism's (NDT's) Tourism Sector Strategy and South African Tourism's (SAT's) Marketing Strategy. The development of niche tourism sectors holds a number of benefits, including:

- the opportunity to diversify the tourism economy via the creation of new markets;
- generate higher yields per visitor, in terms of foreign exchange earnings and consumer spending, even though niche markets are often smaller in size than mainstream tourism markets;
- generally provide greater growth potential than mainstream tourism;

¹ Accelerated Shared Growth Initiative (AsgiSA), 2006.

- significant developmental impacts, often stimulating the creation of quality jobs that require specialised skills, as opposed to the low or semi-skilled jobs generally associated with mainstream tourism;
- niche tourism activities, which are often community-based and located outside of traditional tourist areas, thereby encouraging the geographic distribution of tourism benefits; and
- increased local spending, as niche tourism offerings attract independent travellers, as opposed to pre-paid package tourists.²

Although many products targeting niche markets in South Africa already exist, little substantive research has been conducted to provide estimates on the various niche markets, from a supply and demand perspective. As a result, **the dti's** Tourism Directorate is involved in an ongoing project to research and support the development and growth of niche tourism sectors. To date, research has been completed on community-based tourism, business tourism, as well as backpacking and youth tourism.

In 2008, **the dti's** Tourism Directorate published a trend sheet titled 'Backpacking and Youth Travel in South Africa', while in 2009, the Directorate identified birding tourism or avitourism as a potential high-growth niche, the merits of which required further investigation.

This information booklet is the second in a series of trend sheets on niche markets. In 2010/11, two further niche tourism studies will be undertaken and the results published as part of this series. The purpose of these trend sheets is to communicate the findings of **the dti's** niche tourism studies and highlight opportunities in these sectors.



Nimrod Zalk
Deputy Director-General:
Industrial Development Division

² **the dti** Industrial Policy Action Plan 2010/11 – 2012/13.



Introduction

Birding is one of the fastest growing nature-based tourism activities world-wide and is experiencing similar growth in interest and popularity in South Africa. It has also been recognised that avitourism is an important part of the global growth in nature-based tourism. South Africa is a premier destination for avitourism, due to its large diversity of birds and endemic species, as well as a full complement of major bird habitats in Africa.³ However, insufficient data and a lack of co-ordinated industry-wide planning for future development have made it difficult to develop a targeted strategy to grow this sector. Recognising that South Africa has the potential to grow this untapped niche market, **the dti** concluded that an assessment of the status of the avitourism segment in the country was both necessary and timely.

The information contained in this booklet is based on outcomes of **the dti** *Avitourism in South Africa* research study, commissioned by **the dti** in 2009.⁴ The purpose of the study was to assess the status of avitourism in South Africa, and identify opportunities and constraints to the future development and sustainability of this niche tourism market.

Avitourism Defined

- Avitourism refers to travel outside of one's usual environment,⁵ to view birds in their natural habitat.
- This definition applies to both domestic and international avitourists in South Africa.
- NB: This niche market does not include hunting tourism (e.g. wingshooting).

³ Allan, D. (1995). *Ecotourism and Birding in South Africa*. EWT Vision. 1995: 126-141.

⁴ The full research report, *Avitourism in South Africa*, is available on **the dti** website: www.thedti.gov.za

⁵ For the purpose of this booklet, "one's usual environment" is defined as an area within a 40km radius of home. The choice of 40km is intended to be consistent with *Tourism Definitions Used in South Africa*, DEAT, Tourism South Africa (2008).

Headline Findings of the Avitourism Study

- An estimated three million trips are undertaken internationally each year, specifically for birding purposes.
- South Africa has attractive core birding assets compared to competitor destinations – particularly concerning species diversity, endemism and rarity.
- The total size of South Africa's current avitourism market is between 21 000 and 40 000 avitourists annually,⁶ of which domestic avitourists number between 13 000 and 24 000 per annum.
- Avitourists' total spend was estimated to be between R927 million to R1,725 billion per year, of which domestic avitourists' spend was between R482 million and R890 million annually.
- Though domestic avitourism represents a major untapped market, foreign avitourists also represent an important area for future growth.
- The size of the international avitourism market is between 8 000 and 16 000 avitourists per annum, with an estimated spend of between R309 million and R618 million annually.
- Avitourism's potential contribution to GDP is in the range of R1,205 billion to R2,243 billion annually.
- Avitourists spend more per visitor than those in other niche market segments.
- Avitourists have higher than average income levels, longer trip lengths, and a greater tendency to visit multiple provinces than mainstream tourism market segments. They also spend a higher total number of days per year travelling for birding purposes.
- Domestic and international avitourist profiles correlate with priority market segments targeted by South African Tourism.
- Avitourism generally has positive environmental and conservation impacts.

⁶ This range is extrapolated from survey data, based on known relationships between the number of respondents who indicated membership to the bird clubs and total bird club membership, as a percentage of overall birders. The range does not necessarily include those who visit a birding attraction, such as the penguins at Boulders Beach, while on holiday in South Africa. Were these tourists included, the estimated avitourism market would be considerably larger.

The research process for the study involved:

- a review of the global and local avitourism markets, by means of gathering and analysing qualitative research, including face-to-face interviews and secondary sources;
- a print and web-based survey;⁷
- identification of South Africa's base birding and avitourism assets, including interviews with industry associations, bird clubs, tour operators and accommodation providers; and
- benchmarking interviews with international avitourism stakeholders in Namibia, Kenya, Australia and the United States of America.

Following completion of the market analysis and benchmarking study, a number of recommendations were made to facilitate future industry growth. This booklet provides an overview of the key findings and highlights various business opportunities in the avitourism sector.

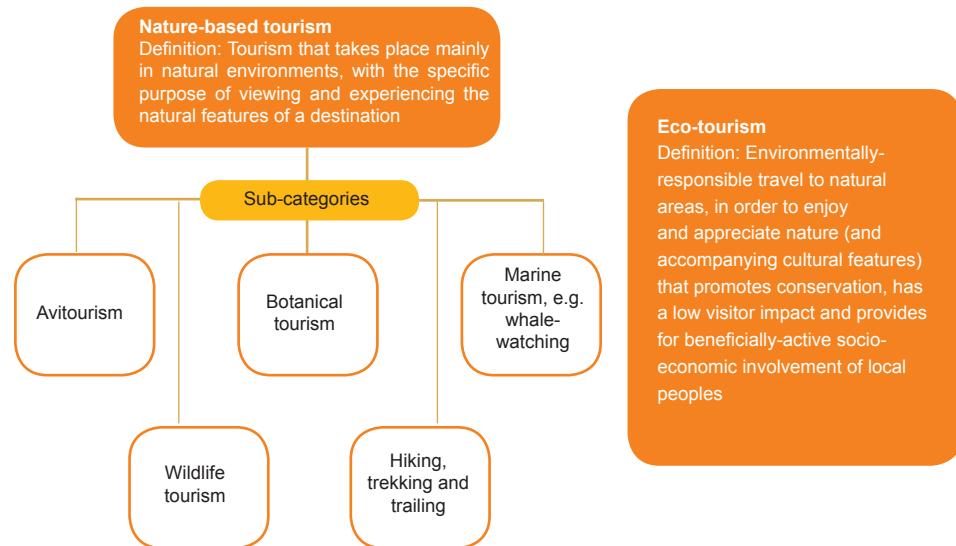
⁷ A questionnaire survey targeting domestic and international birders was conducted between August and December 2009, with the online birding community (advertised in online fora and via e-mail), and with readers of a birding magazine.



What is Avitourism?

Travel by bird-watchers, domestically and internationally, outside of one's usual environment, for the purpose of viewing birds in their natural habitat, is referred to as 'avitourism'. Avitourism is centred on components of the natural environment, i.e. birds and their habitat, and is therefore a sub-category of nature-based tourism. The below diagram defines and illustrates the structure of nature-based tourism (including an overview of its sub-categories), and eco-tourism.

Nature-Based Tourism and Eco-Tourism



Source: H. Keyser (2009); The Nature Conservancy, 2009, www.nature.org

There are two categories of avitourists, which can be defined as follows:

- **International avitourists** are residents of foreign countries who participate in bird-watching activities while visiting South Africa. They may not necessarily have travelled to South Africa exclusively to observe birds in their natural habitat, but do so actively while they are in the country.

- **Domestic avitourists** are residents of South Africa who travel within the country to participate in birding activities. Their travels may entail day or overnight trips.⁸ Day trips, which are accepted as an aspect of overall domestic visitor strategies in many countries, were included in the dti *Avitourism in South Africa* study's definition of avitourism, and represent a potentially significant opportunity for increasing domestic visitation to sites throughout South Africa.

In general, avitourists visit different places looking for species they have not yet seen, or bird behaviour they have not yet witnessed. Avitourists often make use of tour guides to advise them on the potential location and physical attributes of particular species. Bird-watchers require specific equipment such as binoculars, cameras, tripods, spotting scopes, as well as specialised audio equipment, in order to identify and/or capture images and sounds of birds. They also make use of hides or observation towers to conceal themselves from birds, avoid disrupting their normal behaviour and improve viewing conditions.

Previous academic studies of avitourists made a distinction between those who were committed or 'active', and those who were 'passive'. 'Active' avitourists take frequent birding trips, attend courses, and invest in equipment, whereas 'passive' avitourists are defined as people who are able to identify common birds in their neighbourhood or take a passing interest in birds when travelling. Anecdotal evidence suggests that active or 'committed' birders are able to identify 40 or more species, while passive or 'casual' birders, are able to identify 10 or more species.

A survey conducted as part of this project made use of the following categories of avitourists: casual, enthusiastic, and fanatical.⁹ Behaviour and spending patterns across these avitourism sub-segments vary considerably.

⁸ Consistent with tourism definitions used in South Africa, DEAT, Tourism South Africa (2008), for the purpose of the study, 40km is used as a differentiator between avitourists and birders (i.e. those who view birds in their gardens are birders; those who travel more than 40km on day trips or longer trips to view birds are avitourists).

⁹ Turpie & Ryan (1998). *The Nature and Value of Birding in South Africa*. BirdLife South Africa Research Series 1. The classification of birders into these categories is artificial, because of the continuum of levels of commitment to the hobby. Nevertheless, some kind of classification is useful in order to understand the changes in experience and behaviour along this continuum with increasing avidity.

Casual birders typically include those interested in other outdoor and nature-based activities (e.g. whale watching, wildlife safaris, etc.) who could then be persuaded to include birding as an additional activity. Enthusiastic avitourists are also important in that they tend to spend more on birding-related activities and accessories. Primary emphasis should therefore be placed on casual and enthusiastic avitourists, as they could be a high-volume tourism base that is responsive to marketing and other promotional initiatives. Fanatical avitourists' decision-making is difficult to influence, making them a less attractive target segment. International avitourists are assumed to be either enthusiastic or fanatical, as one of their major motivations for travelling is to pursue bird-watching.

In terms of the domestic and international markets, there is potential to stimulate demand for avitourism among casual birders with a general interest in nature-based tourism, and possibly cultural tourism. Rising affluence levels among South Africans, the growing popularity of birding locally and internationally, as well as international experience in avitourism development, all suggest that casual birders are a strong potential growth category.





Why Avitourism?

A Global Perspective on Avitourism

- An estimated three million international trips are taken each year, specifically for the purpose of bird-watching.¹⁰
- The main source markets include the USA, UK, Europe and Australia.
- The main international birding destinations for Americans are other locations in the Americas (Mexico, Brazil, Ecuador, Panama, Costa Rica and Venezuela).
- International locations of birding interest for Europeans are traditionally in Africa (with Kenya, Tanzania, Uganda, Botswana and Namibia being the leading destinations).¹¹ Of late, South-East Asian destinations, such as Indonesia, have become popular with European birders.

Economic Rationale

the dti *Avitourism in South Africa* research study, conducted in 2009, estimates that the total size of South Africa's avitourism market is between 21 000 and 40 000 avitourists annually. Of this total, the number of active and potential domestic avitourists in South Africa ranges between 13 000 and 24 000 consumers. This number has been fairly stable over a long period, with only about 16% growth over the past 12 years. In 1998, the numbers of foreign avitourists visiting South Africa was estimated to be between 750 and 1 500 per year.¹² However, the dti's 2009 study estimates that between 8 000 and 16 000 foreign avitourists visit South Africa per annum. The study also attempted to quantify the size of the avitourism market in South Africa, as indicated in the following table. Collectively, avitourists spend an estimated R927 million, to R1,725 billion, on birding trips, support services and equipment annually.¹³ Using a conservative multiplier of 1.3, the study noted that avitourism's potential contribution to GDP was in the range of R1,205 billion to R2,243 billion annually.

¹⁰ US Fish & Wildlife Service (2001).

¹¹ Turpie, J.K. & Ryan, P.G. (1998). *The Nature and Value of Birding in South Africa*. BirdLife South Africa Research Series 1: 41.

¹² *Ibid.*

¹³ This figure excludes multiplier effects and is a minimum estimate, based on the average spend per consumer, as revealed in the 2009 survey. As such, it should be viewed as an estimate of the total market size.

Estimated Size of the Avitourism Market in South Africa¹⁴

	Domestic	Foreign
No. of Avitourists (per annum)	13 000 – 24 000	8 000 – 16 000
Total Spend (R million per annum)	R482m – R890m	R309m – R618m

Avitourism shares much of its industry infrastructure with other segments of the overall tourism market. For example, avitourists use many of the same lodging, food, and travel services as other tourists, and particularly in respect of their visiting the same national parks and protected areas. Given the overlap of avitourism with other tourism infrastructure, it is difficult to quantify the direct impact uniquely attributable to avitourism in terms of employment. However, it is recognised that avitourism does present employment opportunities across multiple sectors and geographies, particularly at the Small, Medium and Micro-sized Enterprise (SMME) levels.

In their pursuit of observing, identifying and studying birds in their natural habitat, avitourists travel to locations that are often overlooked by other tourists. South Africa has an abundance of attractive birding locations and hotspots present in many areas of the country, many of which do not yet experience high tourist volumes. According to **the dti Avitourism in South Africa** study, limited use of existing avitourism infrastructure in low-volume tourism destinations was observed. Given that avitourism has the potential to improve the geographic spread of tourism, it is an opportunity that should be explored.

¹⁴ This range is extrapolated from survey data based on known relationships between the number of respondents who indicated membership to bird clubs and the total bird club membership as a percentage of overall birders. The range does not necessarily include those who visit a particular birding attraction while on holiday in South Africa, such as the penguins at Boulders Beach, for example. Were these tourists included, the estimated avitourism market would be considerably larger.

The Economic Impact of Avitourism in the USA

The USA is one of the larger global markets for avitourism, with 20% of the US population participating in bird-watching activities. A 2009 study by the US Fish and Wildlife Service showed that one out of five Americans watches birds, with an estimated 48 million birders in the US in 2006, the latest year for which data was available. Though the majority of US birders were found to be backyard birders, 42% (20 million) were found to travel away from home to watch birds. The study estimated that birding across the USA created over 671 000 jobs, with birders contributing US\$36 billion in retail sales (trip and equipment expenditures) and US\$82 billion in terms of total industry output. Total industry output includes the direct, indirect, and induced effects of the expenditures associated with bird-watching.¹⁵ A further study indicated that the economic impact of only five major birding sites in 2007 was US\$40 million.¹⁶ The country has capitalised on the increasing popularity of avitourism – there are not only birding routes, which attract numerous visitors, but also hundreds of birding festivals held around the country.¹⁷

Based on a consumer survey conducted as part of **the dti's Avitourism in South Africa** study, an overview of the average spend of avitourists in South Africa, by level of avidity, is presented in the table featured on page 19. Avitourists were categorised as casual (33%), enthusiastic (57%) and fanatical (10%), and their behaviour and spending patterns were analysed, showing considerable variances between the sub-segments. Compared to the figures from the 1998 survey, by Turpey and Ryan, expenditure by domestic avitourists has increased across the board. The total average annual spend by enthusiastic avitourists, in particular, has more than tripled over the past 11 years. The 2009 study indicates that enthusiastic avitourists form a core market segment for South Africa's avitourism activities.

¹⁵ US Fish and Wildlife Service (2009), *Birding in the United States: A Demographic and Economic Analysis*, Virginia, USA.

¹⁶ Higginbottom, K. (2007), *Wildlife Tourism: Growth Opportunities of the South Pacific*, Presentation, Sustainable Tourism Cooperative Research Centre, Australia.

¹⁷ *Ibid.*

Average Annual Spend (R) of Avitourists per Person in South Africa – 2009 Survey¹⁸

	Domestic Avitourists			International
	Casual	Enthusiastic	Fanatical	
Birding Equipment and Paraphernalia (R)	4,344	9,424	13,835	10,345
Clubs and Courses (R)	442	530	893	704
Self-Guided Birding Trips (R)	11,522	16,786	23,146	20,245
Organised Bird Tours (R)	653	5,463	10,194	20,485
Total Average Annual Expenditure per person (R)	16,961	32,203	48,068	51,779

Comparing avitourism with other niche markets, avitourists had a longer-than-average length of stay, increased trip spend and improved geographic spread. However, avitourism exhibited similar seasonality patterns to other niche markets. The majority of the avitourist spend was on accommodation and transport. Though the avitourism market is a proportion of the total general tourism market, it has great potential for growth since domestic and international visitors to South Africa generally have a high preference for nature-based experiences. Given adequate marketing of the country's avitourism experiences, the potential market size is likely to be much larger.

Avitourism presents an opportunity for increasing the length of stay, not just for dedicated avitourists but also for general tourists. **the dti's** research study indicated

¹⁸ **the dti** *Avitourism in South Africa* study, 2009.

that international avitourists took an average of 11-day trips (six trips of between one and three nights) and 13 longer holidays (greater than three nights) annually for the purpose of birding. Although the majority of their time was spent birding, they devoted a fair amount of their free time to other activities on offer. The study revealed that some avitourists were accompanied by their spouses, the latter of whom might have been interested in activities other than birding. Marketing additional non-birding attractions to avitourists may therefore increase their length of stay in South Africa. Similarly, marketing birding attractions to non-avitourists may lengthen their stay. As such, South Africa's diverse tourism product offerings provide much opportunity to cross-sell avitourism activities with other tourist activities, e.g. a couple travelling to the Western Cape could go birding, and combine this with a wine tour and whale-watching.

the dti Avitourism in South Africa research study indicated that avitourism seasonality patterns do not necessarily differ significantly from broader seasonality patterns. However, the close proximity of high topographical and biome variety provides for varied avitourism holidays year round. Further, avitourism provides the ideal opportunity to improve seasonality by targeting international avitourists during off-season periods and focusing on pelagic tours that could be conducted throughout the year. Additionally, some bird events could serve to attract would-be avitourists during off-peak seasons.

Avitourism and Transformation

Research conducted for **the dti** study suggests that South Africa's domestic and international avitourists spend up to R47 million annually on tour guides. The majority of these avitourists reported a preference for birding in small groups (groups of 1 – 4 people). This preference lends itself particularly well to the use of small tour operators and community guides, rather than larger tour operators. Use of community guides is desirable as they have been proven to be effective environmental stewards, yet only 34% of birders surveyed currently report using community guides. Given the current size of the overall spend on tour guides, and underuse of community guides, expanding the use of community guides carries the potential for significant economic benefit to previously disadvantaged individuals and communities, in particular in terms of support for livelihoods (e.g. increased incomes), enterprise development and capacity building. Opportunities also exist in the provision of Broad-Based Black Economic Empowerment (B-BBEE)-owned and managed accommodation, particularly in areas that are currently underserved.

Moreover, bird route development has a positive impact on local communities by creating socio-economic wealth and environmental conservation. Birding has also encouraged community-based avitourism projects in South Africa.



Environmental and Conservation Impacts of Avitourism

“Birdwatching is becoming the most rapidly growing and most environmentally conscious segment of ecotourism and provides economic hope for many threatened natural areas around the world.”¹⁹

Avitourism also provides environmental benefits to communities, helping to educate locals about the value of biodiversity, and incentivising successful protection and preservation of natural areas. This is due, in part, to the characteristics of avitourists. Like most nature-based tourists, they are typically well-educated, have high levels of ecological knowledge, and greater awareness of conservation issues. There is also a documented high level of overlap between membership in conservation and birding organisations. Consequently, avitourists are expected to try to reduce their environmental impact, understand the difference in ecosystems, and pay protected-area fees while travelling.

It is also likely that avitourism will lead to the protection of more natural areas. The migratory patterns of birds do not necessarily correlate with the designated boundaries of protected land. However, avid bird-watchers will seek them out in non-protected areas, thus creating an incentive for locals to preserve these areas.

South Africa’s Competitiveness as an Avitourism Destination

South Africa is a premier birding destination due to its large diversity of birds, large number of endemic species and full complement of major bird habitats in Africa.²⁰ A benchmarking study of South Africa’s avitourism assets indicated that Brazil, Australia and Thailand were key avitourism competitors of South Africa. Of late, South East Asian and South American countries have become popular birding destinations.

¹⁹ Sekercioglu, C. (2002). Impacts of Birdwatching on Human and Avian Communities. *Environmental Conservation*, 29 (3): 282.

²⁰ Allan, D. (1995). *Ecotourism and Birding in South Africa*. EWT Vision 1995: 126-141.

South Africa's Competitive Advantage as an Avitourism Destination

- **Natural characteristics:**
 - High species diversity, richness and endemism; and
 - A variety of different ecological biomes in close proximity to each other providing for varied holidays.
- **Attractive core birding assets compared to competitor birding locations – in particular bird endemism and rarity, e.g.:**
 - Ease of viewing large numbers of birds quickly, e.g. avitourists can look forward to a three-week trip expectation of 400 species, a higher expectation than a three-week trip in other competing markets; and
 - Twenty-seven (27) endemic species, most of them in the country's unique biomes – namely grassland, fynbos and karoo.
- **Advanced general tourism infrastructure (physical and informational)**
 - Complementary wildlife attractions;
 - Established self-catering accommodation in many birding areas; and
 - Relative ease of self-organised travel, presence of many car rental companies.
- **Advanced birding specific tourism infrastructure**
 - Important Bird Areas (IBAs), birding hotspots and birding routes;
 - presence of trained community guides;
 - infrastructure such as boardwalks, hides and interpretation centres; and
 - established local birding community and supportive organisations that are a solid source of birding information.

Avitourists: Behaviour and Preferences



From **the dti's Avitourism in South Africa** study, it is clear that domestic and international avitourists exhibit different travel behaviour and spending patterns. Results indicate that active South African avitourists spend approximately 38 days a year birding, two-thirds of which are on overnight trips. In contrast, fanatical birders devote 50% more time than this to their hobby. Approximately 60% of birding activity takes place outside these avitourists' home provinces. Casual birders typically stay within South Africa, whereas fanatical birders travel further afield. On average, South African avitourists spend 77% of their time birding within South Africa and 57% of this time in protected areas.

International avitourists tend to be more fanatical (i.e. devote a higher proportion of their overall leisure time to birding and spend more money on tours and equipment). Almost half (49%) of international respondents indicated that they undertook short trips to Africa, 77% of these within Southern Africa. International respondents spend 90% of their overall day trips on birding. They spend approximately 80% of total days on short breaks and longer leisure trips birding. Similar to domestic avitourists, international avitourists also spend more than 50% of their birding time in protected areas.

Overall, self-catering accommodation is preferred by the majority of domestic avitourists, irrespective of type, followed by staying with friends and family, and camping and caravan parks. International avitourists also favour self-catering accommodation, but are more likely to stay in hotels, guesthouses and game lodges than South African birders. As a general rule, the more fanatical the birder, the less is spent per night on accommodation and food.

With regards to tours, approximately 97% of domestic avitourists surveyed organised their own tours, compared to 63% of international avitourists. Twenty-six percent (26%) of domestic avitourists took part in organised commercial bird tours at some point in their lifetime, with participation increasing markedly with avidity (e.g. more than 50% of fanatical birders have been on commercial bird tours compared to 11% of casual birders). Among those who had never been on a bird tour, the preference to bird-watch independently, and the high cost of bird tours, were the most commonly-cited constraints. Between 2007 and 2009, about 18% of domestic avitourists surveyed went on at least one pelagic birding trip within South Africa, and 13% went on at least one pelagic birding trip outside of South Africa.

International avitourists expressed a higher degree of preference for specialist birding tour operators than domestic avitourists. Bird clubs and birding pal groups also appeared to play an important, though occasional, role for domestic avitourists. International avitourists surveyed were more active with respect to pelagic birding tourism – 35% went on at least one trip within South Africa, and 40% went on at least one pelagic birding trip outside South Africa.



Profile of Domestic Avitourists

South African Domestic Avitourist Profile	
Demographics	Travel Behaviour
<ul style="list-style-type: none"> • Home province: <ul style="list-style-type: none"> ○ Gauteng, 38%; ○ Western Cape, 27%; and ○ KwaZulu-Natal, 14%. • Gender: <ul style="list-style-type: none"> ○ 71% male • Age: <ul style="list-style-type: none"> ○ Average 51 years; ○ 13,2% < 30; ○ 34,7% between 30 and 50; ○ 41,3% between 51 and 65; and ○ 10,8% retired (65+). • Household size: 74% had no children in the household. • Education: <ul style="list-style-type: none"> ○ 53% university; ○ 14% matric only. • Household income: 72% > R20,000; 35% > R 40,000; 28% < R20 000 LSM 9 – 10²¹ 	<ul style="list-style-type: none"> • Duration of trip: <ul style="list-style-type: none"> ○ 27 days per annum on overnight leisure trips; and ○ 23 days spent birding. • Birding destinations: <ul style="list-style-type: none"> ○ Western Cape; ○ Mpumalanga; ○ KwaZulu-Natal; and ○ Limpopo. • Mainly inter-provincial, on overnight stays • Group size: <ul style="list-style-type: none"> ○ Equal split between couples and small groups (~40% each) • Accommodation preferences (commercial): <ul style="list-style-type: none"> ○ Self-catering; ○ Camping; and ○ Caravans. • Information sources: <ul style="list-style-type: none"> ○ Birding books; ○ birding/nature magazines; and ○ Internet. • Travel arrangements: <ul style="list-style-type: none"> ○ Self-organised (95%); and ○ specialist operators (4%).

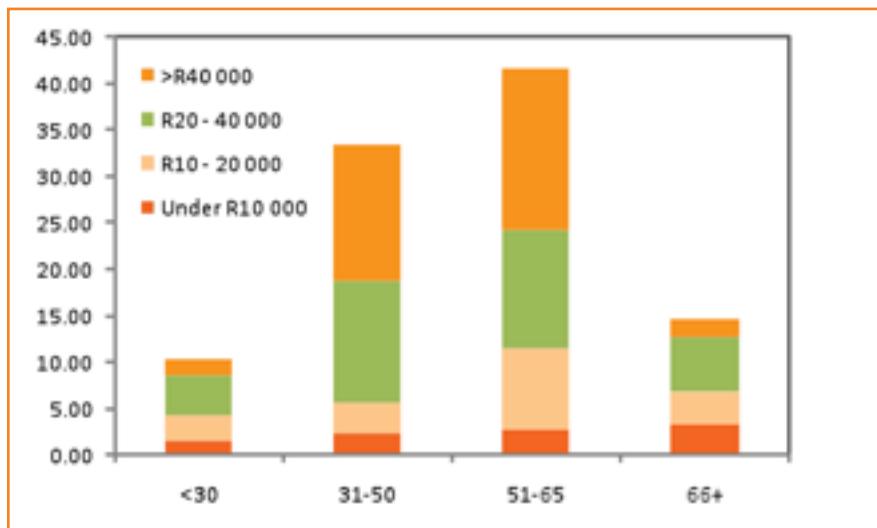
Based on the respondents who participated in the survey, about 75% of active domestic birders were men, the majority of whom were over 40 years old. About 10% of those surveyed were retired. Similar to America and Europe, South African birders tended to be highly educated, with about 52% possessing at least a

²¹ The SAARF LSM (Living Standards Measure) is a marketing research tool that divides the population into 10 LSM groups, with 10 being the highest and 1 being the lowest. LSMs 9 and 10 are the wealthiest segments of the population.

university undergraduate degree, and were relatively well-off. More than a third of respondents (35%) in the 2009 survey had a combined monthly household income of R40 000 or more (56% had a combined monthly household income of more than R25 000). This illustrates the high-yield potential of avitourism.

Overall, self-catering accommodation was preferred by the majority of domestic avitourists irrespective of type, followed by camping and caravan parks, and staying with friends and family respectively. Only 2% of domestic avitourists surveyed used specialised birding tour operators.

Age and Income Profile of South African Birders²²



²² the dti Avitourism in South Africa study, 2009.

Profile of International Avitourists²³

International Avitourist Profile²⁴	
Demographics	Travel Behaviour
<ul style="list-style-type: none"> • Origin: <ul style="list-style-type: none"> ○ Europe (60%); ○ Africa (24%); and ○ USA (8%) • Gender: 82% male • Age: <ul style="list-style-type: none"> ○ Average avitourist was found to be 53 years old; ○ 87% between 41 and 65 years; and ○ 4% over 65 years of age • Education: <ul style="list-style-type: none"> ○ 61% possessed higher education qualifications • Household income: <ul style="list-style-type: none"> ○ Unknown • Marital status: <ul style="list-style-type: none"> ○ Unknown 	<ul style="list-style-type: none"> • Average days of travel per year: Avitourists spent an average of 20 days on overnight trips. • Information sources: <ul style="list-style-type: none"> ○ Internet; ○ Birding books; ○ Birding and nature magazines; and ○ Other birders (word-of-mouth). • Travel arrangements: <ul style="list-style-type: none"> ○ Two-thirds being self-organised; and ○ One-third being organised by specialist birding tour operators. • Travel companions: <ul style="list-style-type: none"> ○ More than half (52%) in pairs; and ○ 16% in groups of up to eight • Destination expectations: <ul style="list-style-type: none"> ○ Species diversity and rare/endemic species being the most important factors; ○ This was followed by the overall number of birds sighted; and ○ Other attractions/things to do were considered to be of relative importance. • Accommodation preferences: <ul style="list-style-type: none"> ○ Self-catering being the most popular; and ○ This was followed by hotels and game lodges.

the dti Avitourism in South Africa study, of 2009, indicated that 85% of international avitourists visiting South Africa had been on dedicated birding trips. The remainder had combined birding with business trips, family visits and other types of tourism

²³ Due to the small sample size of international respondents in **the dti's** 2009 study, the findings pertaining to international avitourists should be regarded as an estimate.

²⁴ **the dti Avitourism in South Africa** study, 2009.

activities. International avitourists visiting South Africa spent an average of 20 days in the country, with 63% having organised their own trips.

International avitourists expressed a high degree of preference for specialist birding tour operators and were less inclined to use travel agencies and general tour operators to organise their trips. These tourists were more likely to engage in birding, either alone or with one other person (52%), but also exhibited the highest tendency among all categories of birders to bird in groups of up to eight people (15%).

The study indicated that about a third of international avitourists participated in guided tours. The average group size on tours was nine, compared with two for independent tourists. Those on tour spent significantly more per person, per day, but also saw more bird species on their trips. In terms of accommodation, self-catering was also the most popular accommodation among international respondents, followed by game lodges and hotels.

Almost two-thirds of international avitourists visiting South Africa were from Europe. Visitors from North America had a greater propensity to join tours compared to those from other parts of the world. Only 22% of these visitors combined their visits with trips to a neighbouring country. Most international avitourists visited South Africa in spring (September to November), and visits were lowest between April to July.

The most common reason cited for choosing South Africa as a birding destination was the quality of the bird life in the country, with many referring to specific bird groups or the large numbers of endemic species. After the abundance and variety of bird life, the key contributing factors were the abundance of other wildlife, excellent national park system, favourable infrastructure, and the quality of birding information and products. Other attractions were the spectacular scenery, diverse flora, cultural and historical aspects, favourable safety and health conditions relative to other African destinations, and value for money.



Avitourism Locations and Hotspots

Key Findings: South Africa's Base Birding Assets

- Of the more than 900 bird species in Southern Africa, most are located in South Africa.
- South Africa has an estimated 725 bird species, with most of the endemic species located in the country's unique biomes – namely grassland, fynbos and karoo. There is increasing 'species richness' from the south-west to the north-east of the country.
- South Africa has 122 Important Bird Areas.
- South Africa is home to 45 globally-threatened or near-threatened bird species.
- The country has birding spectacles of seabirds and waterbirds located on off-shore rocky islands, as well as on South Africa's mainland coastline and inland wetlands.
- There are numerous birding routes, including eight major routes developed by BirdLife SA.
- South Africa has extensive man-made birding infrastructure with good birding opportunities, e.g. picnic and camp sites, and bird hides.

Important Bird Areas

The Important Bird Areas (IBAs) programme was initiated by BirdLife International, in order to identify and protect a network of sites that are critical for the long-term viability of naturally-occurring bird populations, across a range of bird species, for which a site-based approach is appropriate".²⁵ A total of 122 IBAs have been identified in South Africa.

²⁵ BirdLife South Africa, www.birdlife.org.za

Birding Hotspots

Domestic and international birders have different preferences in terms of where they like to go birding, at a regional and sub-regional level. International avitourists, either on self-drive or organised birding tours, tend to try to maximise the number of African or Southern African endemic species seen in a trip. Their itinerary is also influenced by other factors, such as other wildlife attractions and accessibility by road. Domestic and regional avitourists, on the other hand, are influenced by proximity and additional factors, such as wanting to see new places. In other words, different types of avitourists focus, to a different extent, on 'hotspots'.

Birding Hotspots in Eastern and Western South Africa	
Western South Africa	Eastern South Africa
<ul style="list-style-type: none">• Kirstenbosch Botanical Garden• Boulders Beach African penguin colony• Strandfontein Sewage Works• Pelagic birding: Cape Town, Lamberts Bay, Betty's Bay• West Coast National Park• Tanqua Karoo• De Hoop Nature Reserve• Bushmanland: Brandvlei, Pofadder• Kalahari: Kgalagadi Transfrontier Park• Cape Recife• Addo Elephant Park• Karoo National Park	<ul style="list-style-type: none">• Mkuze Game Reserve• Ndumo Game Reserve• Greater St Lucia Park• Eshowe: Dlinza and Entumeni Forests• Marievale Bird Sanctuary• Suikerbosrand Nature Reserve• Wakkerstroom• Kruger National Park• Strydom Tunnel• Mapungubwe National Park• Magoebaskloof• Sani Pass

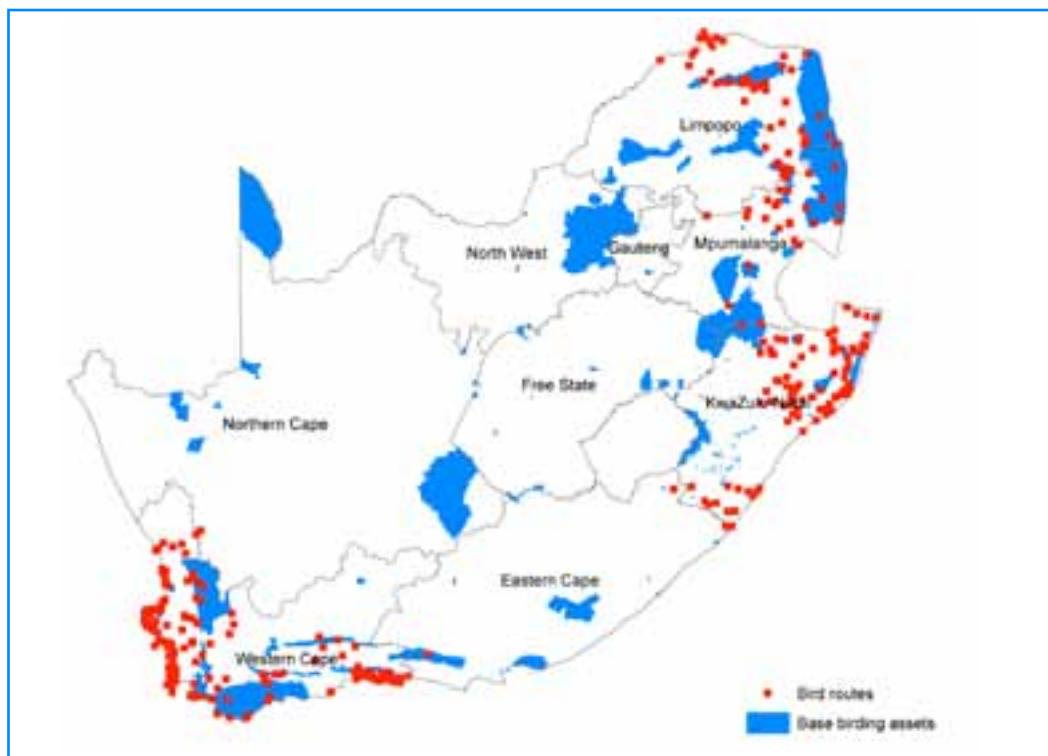
According to **the dti Avitourism in South Africa** study, at a regional level, the Western Cape province was the most popular birding destination among domestic avitourists (who spent 25% of their birding time there between 2007 and 2009), followed by Mpumalanga, KwaZulu-Natal, Limpopo and Gauteng (13%–14%). These tourists

spent less than 10% of their time in the Eastern Cape, North West, Northern Cape and the Free State (the least popular birding destination, at less than 2% of the time). International avitourists followed a different pattern, with 23% of their birding time being spent in Gauteng, 21% in Mpumalanga, 13% in Limpopo and the Western Cape, and less than 10% in all the other provinces.

Birding tours of South Africa, designed to cater to the needs of serious international avitourists, normally focus on either the east or the west of the country, and often provide the opportunity to combine both regions, by scheduling the trips back-to-back. The map on page 33 features South Africa's base birding assets and routes, which are often included in avitourism operator itineraries. The east of the country offers exceptionally high diversity of bird species, spectacular forests, grasslands and high altitude environments, and the world-famous Kruger National Park. Due to the high diversity of bird species, the eastern region is generally more attractive to first-time visitors. The west of the country is known for high fynbos and Karoo endemics, world-class pelagic birding and the remote Kalahari Desert, making it attractive to avitourists wanting to add more range-restricted endemics to their lists.



Geographical Distribution of Base Birding Assets²⁶



The Western Cape is the most important endemic bird area in Africa and as such, is very attractive to international avitourists. Base birding assets (i.e. Important Bird Areas, Ramsar sites, birding hotspots), which are often in rural and remote areas throughout the nine provinces, are shown in the above map. More information on birding hotspots and IBAs can be sourced via BirdLife SA's website: www.birdlife.org.za

²⁶ Sources: BirdLife SA, UCT Animal Demography Unit and Tourism Grading Council of South Africa.

Pelagic Birding

The Western Cape has an extremely wide array of seabirds, in terms of diversity and abundance, which is driven mainly by the upwelling of nutrient rich waters created by the Benguela Current. This, in addition to a vibrant fishing industry, sets the scene for unique pelagic birding opportunities. South Africa has several breeding seabird colonies, mainly located on the country's 17 offshore rocky islands around the coast from Bird Island on the West Coast to the Algoa Bay Islands, off Port Elizabeth. On the mainland coast, near Cape Town, breeding colonies of African Penguin and Kelp Gull are plentiful. Many of the country's larger coastal lagoons and estuaries provide impressive aggregations of waterbirds, dominated by migratory waders in the summer. The most important of these are Langebaan Lagoon, St Lucia, Southern Sanctuary in Richards Bay, and the Berg River Estuary. Though there are existing pelagic touring opportunities throughout the year, there is considerable potential for product development.

Pelagic Birding: An Opportunity

Pelagics (birds that frequent coastal waters and the open ocean) represent an opportunity to improve the seasonality of international and domestic avitourism. The best time for viewing pelagics in South Africa occurs during the southern hemisphere's winter. Since the infrastructure used for pelagic touring is often dual purpose (e.g. used for whale-watching, shark cage diving and fishing), promoting pelagic touring, in particular, can improve the uptake of other tourism activities during the off-peak season. Moreover, from a domestic avitourism perspective, opportunities for viewing bird spectacles, vagrants and pelagics, for example, occur throughout the year.





Avitourism Activities and Services

Role-Players in South Africa's Avitourism Industry



South Africa boasts an established avitourism industry, encompassing information providers, tour operators and guides, accommodation providers, and support organisations such as BirdLife SA. There are more than 30 local and international specialist birding tour operators (a full list of operators and bird clubs affiliated to BirdLife SA is available at www.birdlife.org.za), hundreds of birder-friendly accommodation establishments and more than 50 national bird clubs. Specialist tour operators also run specialised programmes for avitourists, often combining avitourism with other niche tourism markets. Avitourism also enjoys corporate sponsorship from some of the largest companies in the country, which provide funding for a wide range of activities, including bird guide training and community nature-based tourism projects.

In terms of academic research, the University of Cape Town's (UCT's) Animal Demography Unit and Percy Fitzpatrick Institute of Ornithology play key roles in bird-related data collection and analysis to inform avitourism and bird conservation. Information is disseminated via numerous local and international online and print sources, which are suitable for all levels of birders and bird enthusiasts.

Birding Facilities and Access

In addition to its natural assets, South Africa has man-made birding infrastructure which, collectively, forms an important asset. This man-made infrastructure includes camp sites, picnic sites, bird hides, trails and boardwalks. These facilities are significant, as birders and birding tour operators are attracted to their presence and accessibility to the birds. In general, protected areas are more attractive than unprotected ones because they are likely to contain a higher diversity and abundance of birds than in surrounding areas, and also because they are accessible and considered safer.

Smaller nature reserves that do not contain high densities of dangerous wild animals are attractive in that they allow unguided walking. Nevertheless, bird-watching is still extremely popular in protected areas in which it is not possible to leave one's car, except at designated spots. Camp and picnic sites, and waterholes, are often primary areas for birding in protected areas. In these areas, bird hides are important facilities that are generally in abundant supply. Most protected areas, which contain wetlands, have bird hides and avail information on birds. Some reserves in or near urban areas also feature interpretive centres used for environmental education. However, it must be noted that not all birding requires bird hides. Hides are most often used to provide viewing opportunities for shy waterbirds and bird colonies up close, without interfering in the daily activities of the birds.

Other facilities that make birding easier include trails and boardwalks. Boardwalks are particularly useful where the terrain is rocky or marshy, or where visitor activities need to be managed. Sewage works, due to their importance as feeding sites for bird species, are often attractive for birders, but not all provide easy access (e.g. some require bird club membership). Information boards on the biology of birds and their identification also add value when they do not intrude on the aesthetics of an area (e.g. placed in hides and at appropriate points along trails).

Marketed Birding Routes

Several birding routes have been devised in South Africa, as a marketing mechanism to promote avitourism, and stimulate local economic development and empowerment in rural communities.²⁷ The BirdLife SA booklets on each of the birding routes provide practical information on the routes, accommodation and facilities, as well as checklists. These routes, which together cover various base birding assets across the country, include:

- Greater Limpopo Birding Route;
- Gauteng Birding Route;
- Mpumalanga Birding Route;
- Zululand Birding Route;
- Southern KwaZulu-Natal Birding Route;
- Eastern Cape Birding Route;
- Western Cape Birding Route; and
- Diamond Route.

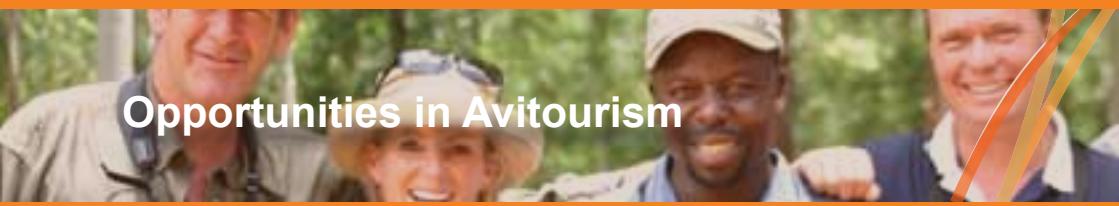
²⁷ For more information, visit www.birdingroutes.co.za

Birding Events

A number of birding events take place throughout the year, such as the Sasol Birds and Birding Fair, National Bird Week and Sappi BirdLife SA's Big Bird Day. Various birding weekends are also held throughout the year, in different birding hotspots.

For more information on birding events and dates, contact BirdLife SA or your local bird club.





Opportunities in Avitourism

Catering for Avitourists	
Opportunities for Existing Tourism Enterprises	New Business Opportunities in Avitourism
<ul style="list-style-type: none">Identify the establishment's potential for avitourism, e.g. proximity to base birding assets (IBAs, hotspots, wetlands, routes), availability of community guides;Join a bird club and start bird-watching – you live in proximity to a birding route or in an area with natural birding assets, you may be able to turn a hobby into a business;Become a Birder-Friendly Accommodation Establishment;²⁸If feasible, invest in appropriate birding infrastructure (e.g. boardwalks, interpretive trails and hides);Leverage off local birding events;Advertise the availability of local community birding guides; andContact bird guides in your area and work together with them to develop birding tour add-ons to existing tours.	<ul style="list-style-type: none">Offer community bird guiding;Offer specialist bird tours and guiding services;Market birding opportunities in the area to visiting tourists;Establish Birder-Friendly Accommodation²⁹ in birding areas with a lack of existing accommodation;Retail opportunities: equipment, accessories, catering and restaurants in birding hotspots;Pelagic birding opportunities in coastal areas;Attract tourists to rural and outlying areas located in IBAs or hotspots; andOffer birding tours as add-ons to existing tours.

²⁸ Contact BirdLife SA for more information, www.birdlife.org.za

²⁹ Ibid.

Avitourism provides a number of opportunities for existing tourism establishments to cater to avitourists, while also offering new business opportunities for Small, Medium and Micro-sized Enterprises (SMMEs). Besides marketing, there is a host of activities available for SMMEs to enhance birding opportunities in their businesses. These could include the development of small bird hides, which would enhance photographic opportunities, as well as interpretive trails and bird lists, all of which would assist in attracting avitourists. The purpose of this section is to encourage aspirant entrepreneurs to establish or expand their business in a manner that caters to the needs of avitourists. A few ideas are presented herein, which can be used by avitourism entrepreneurs, and are by no means exhaustive or prescriptive.

Marketing for Avitourists

Avitourists, being such a specialised niche market, require specialised information. Market knowledge is critical when designing a marketing campaign for birders. Often, direct print advertisements are lost on niche markets and a more targeted approach is required, such as editorials in bird club newsletters, planning special birding weekends and highlighting the names of “specials”³⁰ spotted in the locality.

Marketing for Avitourists

- Bird lists are essential – develop a list of local birds and an inventory of specials and species that birders tend to want to see.
- Utilise birding publications, bird club newsletters and event-based activities, e.g. competitions and birder weekends.
- Get involved in birding fora and discussion groups to spread the word.
- Ensure that visiting avitourists have a great experience and take advantage of invaluable word-of-mouth marketing.
- Network with existing specialist tour operators and guides. If feasible, attend national/international birding shows to promote your product.
- Link your business to existing bird routes; this is valuable in promoting your business to birders.

³⁰ “Specials” refers to unusual birds, or difficult birds to see in the wild, generally sought after by avitourists.

Starting an Avitourism Business

It is critical for aspirant avitourism entrepreneurs to conduct market research in order to understand the potential for avitourism in a specific area. The Department of Tourism has a publication titled: ‘How to start and grow a tourism business’, available from the Department’s offices, provincial government or SMME development agencies like the Tourism Enterprise Partnership (TEP).³¹ To find out more about opportunities in avitourism, contact BirdLife SA’s Avitourism Division.

Starting an Avitourism Business³²

1. Develop an idea. This may be related to a specific birding site, route or tour.
e.g. pelagic birding tours on the West coast, birder friendly accommodation in a birding hotspot.
2. Conduct a feasibility study to determine the viability of birding tourism in the identified area (including market analysis, supply analysis, competitor analysis, etc.).
3. Develop a business strategy and a business plan.
4. Consider the investment requirements of the project as well as potential funding sources.
5. Consult stakeholders to help determine other opportunities related to the project.
6. Develop a marketing plan. Consider potential target markets, market needs, product gaps, pricing, distribution and advertising.
7. Consult the Department of Tourism’s publication, titled *How to Start and Grow a Tourism Business*,³³ as well as the TEP website.³⁴

³¹ www.tep.co.za

³² Mooketsa, K. and Sekhute-Batungamile, S. (2009). *Avitourism: A Guide to Starting a Community-Based Birding Tourism Business*, BirdLife Botswana.

³³ Available from Department of Tourism website: www.tourism.gov.za

³⁴ www.tep.co.za

Diversifying an Avitourism Business

As tourism is often seasonal, it is important that avitourism businesses diversify their product and income streams. For example, whale watching tour operators can diversify their product range by developing pelagic tours while birding tourism businesses can look to other income sources during low tourist seasons.

Diversifying an Avitourism Business³⁵

Some ideas on diversifying an avitourism business include the following:

- *Local dam or wetland:* This area can be developed for recreational fishing or be turned into a picnic area or campsite.
- *Culture:* Cultural tours can be developed in order to showcase local culture to tourists.
- *Historical sites:* Most places have historical sites that can be good tourism attractions.
- *Curios and crafts:* Bird-related crafts may have special appeal to avitourists.
- *Birder-friendly accommodation facilities:* Birder-friendly establishments offer flexible meal times for birders, provide local birding information, and local bird guide contact details.³⁶

Avitourism has the opportunity to promote transformation by empowering, among others, previously disadvantaged individuals (PDIs) to be part of the commercial mainstream of avitourism by:

- development of cultural tourism at birding destinations;
- linking indigenous knowledge and heritage components to existing bird tours (e.g. African bird mythology);
- black ownership of businesses in the value chain; and
- training local PDI community guides.

³⁵ Mooketsa, K. and Sekhute-Batungamile, S. (2009). *Avitourism: A Guide to Starting a Community-Based Birding Tourism Business*, BirdLife Botswana.

³⁶ Contact BirdLife South Africa's Avitourism Division for more information on registering as a Birder Friendly Accommodation establishment.

Due to the attractive demographic profile of birders, there is also an opportunity to gain sponsorship from corporates interested in funding birding conservation assets. Several local and international corporates are sponsors of birding related events.

Bird Guiding Requirements

In South Africa it is illegal to conduct guided tours without the proper qualification. In order to practice as a local bird guide in South Africa, guides need to be licensed and accredited by the relevant provincial tourism authorities as well as by Tourism, Hospitality, Sport Education and Training Authority (THETA). Additionally, Professional Driving Permits (PDPs) are required by all drivers of vehicles operating on public roads who generate income. As such, a tour operator or guide, who is also a driver of a tour vehicle, requires a PDP. Please refer to the lists of useful resources and contact details on pages 50 and 51.

Becoming a Community Bird Guide

BirdLife SA's Community Bird Guide Training Programme* provides local community members with an opportunity to participate in avitourism while creating an awareness of the economic benefits of birds and their habitats to local communities. The programme works together with communities to identify potential Community Bird Guides. Funding is then sourced to assist these community members in attending a one-month accredited bird guide training course. An extensive route mentorship and support programme is also in place to develop guides once training is completed.

*Contact BirdLife SA for more information in this regard.





Case Studies of Successful Avitourism Businesses

Case Study: Avian Leisure – BirdLife SA Birder-Friendly Establishment

Avian Leisure offers self-catering accommodation in Simon's Town, in the Western Cape. It comprises two separate apartments, situated in an indigenous garden that is home to a wide variety of sought-after Cape endemics. The owner-run establishment is ideally located to cater to the avitourism market, directly above the world famous African Penguin colony, at Boulder's Coastal Park, and in close proximity to the harbour for pelagic birding trips. Due to the supply of accommodation in Cape Town being highly competitive, the owners, Patrick and Marie-Louise Cardwell, focused on their birding expertise as a unique selling point, to give their business a competitive advantage.

Unique services and attributes include:

- proximity to key birding locations (the penguins, pelagic trips, Cape Point and other Peninsula birding sites);
- location in a natural fynbos garden with birdfeeders, attracting many endemic bird species;
- birding-related literature in the apartments, including the owners suggestions on where to bird in the area;
- flexibility with regard to early/late arrivals and departures, as birders do not tend to keep regular hours;
- free planning assistance to guests for self-drive birding excursions;
- guided birding excursions (Patrick Cardwell is a specialist bird guide); and
- assistance with onward travel and birding in the rest of the country.

The establishment enjoys high occupancy rates, with 80% of guests being international visitors. Roughly 50% are avitourists, mainly from UK, North America, Europe and Australia/New Zealand, and about 10% are from South Africa. Avian Leisure is a BirdLife SA ‘Birder-Friendly Establishment’. This stamp of approval is an important assurance to guests that they can expect a certain level of knowledge and awareness with respect to birders’ needs and expectations.

Case Study: David Letsoalo, Bird Guide

Since 2002, David Letsoalo has guided birders in the Magoebaskloof-Woodbush area of the Limpopo province and is currently based at Kurisa Moya Nature Lodge. He was awarded the BirdLife SA Eagle Award for the 'Best Local Guide in South Africa' and serves as a Council member of BirdLife SA. While he undertakes birding trips throughout the country, he specialises in the birding hotspots of Magoebaskloof and the indigenous forest of Woodbush.

David has guided experienced birders from all over South Africa and is a sought-after guide among international twitchers, due to his specialist expertise and years of experience in the field. David trains and mentors guides from all over Limpopo. As a member of various birding organisations, he has started to 'green' local schools and educate young birders on avian conservation.



Case Study: Sisonke Municipality, Development and Promotion of Avitourism

Sisonke Municipality, located in the south-west of KwaZulu-Natal, on the border of the Eastern Cape and Lesotho, identified avitourism as a key focus in its district tourism plan. Research showed that while the area had many generic tourism assets, it had no unique selling points to attract tourists. After identifying the comparative advantages of the region, a district tourism plan was adopted around rail, mission and avitourism. Though the municipality has a modest species count of 300, its high rate of endemism (16%), as well as the availability of 'specials', such as the Blue Swallow and Cape Parrot, make the area highly attractive to avitourists.

In terms of avitourism, the municipality has implemented plans to specifically target avitourists, including:

- establishing the Marutswa Forest Trail and Boardwalk, a joint initiative between the Bulwer Biosphere and the Sappi-World Wildlife Fund Tree Routes Partnership, with BirdLife SA and the Southern KwaZulu-Natal Birding Route providing marketing support. The initiative comprises a network of arterial trails, leading into an indigenous forest, where lookouts, jetties and viewpoints will be erected to provide birders with multiple views of the various forest layers;
- improving access roads to the remote Ntsikenzi Nature Reserve, one of the province's most important wetlands, which is rich in bird life; and
- promoting avitourism in the Sani Pass region, which comprises five birding habitats.

Case Study: Birding Africa – Specialist Avitourism Tour Operator

Birding Africa is a small tour company, based in Cape Town. In 2010, the esteemed *Birdwatch Magazine* ranked the company in the top five most recommended global bird tour companies. Their tours are led by a group of biologists, bird book authors and conservationists, drawn together by a common passion – sharing their enthusiasm for Africa's birds with others. Since 1997, they have led personalised tours around their home town of Cape Town and further into Africa, for top international tour companies and small groups of birders.

Their day trips from Cape Town focus on finding the endemic fynbos, Karoo and coastal birds that are unique to the region. Birding Africa also works with its sister company, Cape Town Pelagics, in offering boat trips offshore in search of albatrosses, to raise money for albatross conservation. Birding Africa's longer trips, of two to three weeks, focus on exploring the Cape, Kruger and Drakensberg regions, either in the company of an experienced bird guide, or on a self-drive basis, using local community sites at special birding spots. Callan Cohen, the Director of the company, is the author of the acclaimed *Southern African BirdFinder*, a guide to the best birding spots in Southern Africa, which is popular with both local and international birders exploring the country.



Sources of Assistance for Avitourism Activities

SMME Support and Government Departments	
Department of Trade and Industry (the dti) the dti Customer Contact Centre (general): 0861 843 384 Tourism Directorate: (012) 394 1183 / 1372 Website: www.thedti.gov.za	National Department of Tourism (NDT) <i>General Enquiries:</i> (012) 310 3911 Website: www.tourism.gov.za
Tourism Enterprise Programme (TEP) Tel.: (011) 880 3790 Website: www.tep.co.za	Small Enterprise Development Agency (Seda) Tel.: (012) 441 1000 Website: www.seda.org.za
Sources of Financial Assistance	
Industrial Development Corporation (IDC) Tel.: (011) 269 3000 Website: www.idc.co.za	Khula Enterprise Finance Ltd (Khula) Tel.: (012) 394 5560 Website: www.khula.org.za
National Empowerment Fund (NEF) Tel.: 0861 843 633 Website: www.nefcorp.co.za	Business Partners Tourism Fund Tel.: (011) 480 8700 Website: www.businesspartners.co.za
Commercial Banks	
A number of the large commercial banks have tourism finance desks that can be approached for financial support.	

Industry Contact Details

BIRDING AND AVITOURISM	
BirdLife South Africa <i>General Enquires:</i> (011) 789 1122 <i>Bird clubs and general information</i> Website: www.birdlife.org.za <i>Avitourism and routes</i> Website: www.birdingrout.es.co.za	South African National Parks (SANParks) Tel.: (012) 426 5036 Website: www.sanparks.org.za

OTHER KEY CONTACTS	
Association of Southern African Travel Agents (ASATA) Tel.: (011) 327 7803 Website: www.asata.co.za	Federated Hospitality Association of South Africa (FEDHASA) Tel.: (011) 467 5009 Website: www.fedhasa.co.za
Fair Trade in Tourism South Africa (FTTSA) Tel.: (012) 342 3642 Website: www.fairtourismsa.org.za	Southern African Tourism Services Association (SATSA) Tel.: 086 12 72872 Website: www.satsa.com
South African Youth Travel Confederation (SAYTC) Website: www.backpackingsouthafrica.co.za	Tourism Business Council of South Africa (TBCSA) Tel.: (012) 654 7525 Website: www.tbcса.travel

the dti Avitourism in South Africa study can be downloaded via the dti website: www.thedti.gov.za

Alternatively, contact the dti Tourism Directorate for further information:

Tel.: (012) 394 1183 / 1372

the dti Tourism Directorate: (012) 394 1183 / 1372

the dti Customer Contact Centre: 0861 843 384

the dti Website: www.thedti.gov.za

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REPUBLIC OF SOUTH AFRICA

