CBI Product Factsheet:

Birdwatching tourism from Europe
**Introduction**

Birdwatching is a fast growing niche market, as Europeans are increasingly becoming involved in birdwatching. An increasing number of birdwatchers are travelling to long haul destinations to spot new birds. Birdwatching could therefore be an interesting segment for tourism companies in developing countries. Important product requirements for birdwatchers are quality birdlife, safety, birding accessibility and infrastructure and knowledgeable guides.

**Product description**

**Product definition**

Birdwatching tourism or Avitourism refers to travel outside of one’s usual environment where the main purpose is to view birds in their natural habitat. Birdwatching tourism is centred on components of the natural environment, birds and their habitat, and is therefore a sub-category of nature-based tourism (Figure 1).

![Sub-categories](source: H. Keyser: The Nature Conservancy 2009)

This Product Factsheet will give more insights into birdwatching tourism from Europe, especially to long-haul developing country destinations. There is a special focus on the United Kingdom and the Netherlands, given that specialised European birdwatching tour operators report that interest in birdwatching is highest in these countries. Other interesting markets include the Scandinavian countries and Germany.

**Traveller profile**

According to several studies and interviews with birdwatching experts, some general characteristics of birdwatchers are:

- They can be found in all age groups, but middle-aged and elderly people represent the largest group (40-70 years of age)
- They tend to be well educated and relatively affluent
- They are slightly more often male
- They are generally also interested in other wildlife
- They are likely to be members of local bird or nature organisations
- They generally use bird/nature books or magazines, bird/nature organisations or recommendations from other birdwatchers when deciding where to go birdwatching
- International birdwatchers are more likely to travel alone, in couples or in small groups.

Three main segments of birdwatching tourists can be distinguished:

**Twitchers**

Twitchers are estimated to represent around 10% of birdwatching tourists and are predominantly male. They are fanatical birdwatchers who want to see as many birds as possible and travel far distances to see new or rare birds to add to their list. Once they have seen one, they move on. Some even engage in competitions to accumulate the longest species list. They bring their own equipment such as telescopes and binoculars and are not really interested in other activities. They can especially be found in the United Kingdom, and to some lesser extent in the Netherlands and Scandinavia.

**Tip:**

- Twitchers should not be your focus segment, as their decision-making behaviour is difficult to influence.
**Enthusiasts**

This segment represents around 50% of birdwatching tourists, and it is equally divided between men and women. They are bird and nature lovers who generally have a profound knowledge of the fauna of a destination. Weather and other circumstances are of minor interest to them. They are slower travellers than twitchers, as they also like to relax. Next to birdwatching they are also interested in other, often cultural, activities, such as local communities and cultural heritage sites. They generally spend more on birding tours and equipment than is common in other birdwatching tourist segments.

**Tip:**
- Focus primarily on enthusiastic and casual birdwatchers. They could be a high-volume tourism base that is responsive to marketing.

**Casuals**

This segment is estimated to represent around 30% of birdwatching tourists. Casual birdwatchers include travellers interested in other outdoor and nature-based activities such as hiking or wildlife watching. They could be persuaded to include birding as an additional activity. As birding is growing in popularity, casual birders are a strong potential growth category.

**Tips:**
- To attract casual birdwatchers, market your birdwatching offer to tourists on the spot, for example by distributing flyers in your area.
- Cross-sell birdwatching activities with other tourist activities, for example a wine tour, visiting local communities or a photography workshop to improve skills for making perfect photos.
- Offer birdwatching tours as add-ons to other tours.

**Product specifications**

The following product specifications are important for European birdwatching tourists.

**Quality of birdlife**

The attractiveness of a destination for birdwatching is highly related to birdlife quality. The availability and variety of birdlife and the presence of specific bird groups or endemic species are the main factors when choosing a birdwatching destination. The annual migratory pattern also plays an important role in destination choice. Some destinations are seasonal, and are only interesting during bird migration or breeding periods. Other destinations that have high topographical and biome diversity (e.g. South Africa) allow varied birdwatching tourism throughout the year.

**Tips:**
- Provide detailed information about which birds can be seen in your area and when they can be seen (all year round or only during migration). For example, consider developing a 'calendar' that indicates the best period to see certain birds. Especially emphasize the presence of rare or endemic birds.
- If you cannot offer birdwatching year round, diversify your product offerings during the low season. For example, develop nature tours that focus on natural scenery and other wildlife.
- Make sure that your product descriptions match reality. For example, consider including sound and images of the species on your website.

**Safe destination**

Safety is another important requirement of birdwatchers when choosing a birdwatching destination. As birdwatchers often spend significant portions of their time alone or in small groups in isolated areas, they want those areas to be safe. Protected areas are in general more attractive than unprotected ones. Not only because they are likely to contain a higher diversity and abundance of birds, but also because they are better accessible and considered safer.
Birding accessibility and infrastructure

Accessibility to birds and advanced birding infrastructure are important to birdwatchers. Many birdwatchers require proximity to Important Bird Areas and birding hotspots and presence of birding routes, bird lists, trails, boardwalks, hides and observation towers as they make birdwatching easier. Information boards on the biology of birds and their identification also add value.

Tips:
- Invest in appropriate birding infrastructure.
- Link your business to existing bird routes.
- Develop new birding routes. Consequently, make booklets/field guide books that provide practical information on the routes, accommodation and facilities, as well as bird checklists.

Knowledgeable guides

A knowledgeable guide is key to the quality of a birdwatching trip. Birdwatchers often make use of local bird experts who advise them on the potential location and physical attributes of particular species, as this increases the chances of seeing less common and local species. Many birdwatchers prefer guides who speak their language and expatriate guides may therefore be preferred.

Tips:
- Offer specialist bird tours and guiding services. Also showcase birdwatching opportunities outside of major tourism areas (off the beaten track).
- Speak the language of your target group. Make sure you have profound knowledge of the birds that can be spotted at your destination: the variety of birds and where they can be seen, their behaviour and historical information. If you do not have this knowledge, hire experienced bird experts, either local or international.
- Make sure that your tour guides have good English-language skills. If you can offer guides with additional language skills (e.g. German, French or Italian), this is always an advantage.

Birder-friendly accommodation

Many birdwatchers look for birder-friendly facilities. Older birdwatchers and groups tend to stay in more comfortable facilities, like 3-4 star hotels. For twitchers and enthusiastic birdwatchers, birds have priority over comfort. They generally stay in smaller, more modest facilities and know that the best available accommodation in birdwatching areas could be basic, possibly below Western standards. The experience of birdwatching is often enhanced by the accommodation types, such as tented camps in Africa, haciendas in the Andes, or rainforest lodges in Central and South America.

Tips:
- Offer several accommodation options so that birdwatchers from different segments can choose an accommodation that best meet their needs and preferences.
- Provide birder-friendly facilities (e.g. early morning breakfast, flexibility in arrival and meal times, and the availability of birding literature). Emphasize these facilities in your marketing activities.

Combination with other travel activities

Most birdwatchers are also interested in other activities, especially related to culture. A birdwatching tour therefore generally also incorporates some other activities, such as a cultural tour, a visit to a local community, archaeology or wildlife observation. On some tours, there may also be alternative activities for non-birdwatching partners.
What is the demand for birdwatching tourism from Europe?

Market size

In addition to being the largest European source market for trips to developing countries, the United Kingdom is also the largest European source market for birdwatching tourism (and the second largest worldwide after the USA). The United Kingdom is home to the largest bird organisation in Europe, the Royal Society for the Protection of Birds (RSPB) with more than 1 million members. According to RSPB around 6 million United Kingdom residents are regularly engaged in birdwatching, which is almost 10% of the population. Around 50 United Kingdom tour operators offer specialised birdwatching tours which together have some 20 thousand bookings annually.

The Netherlands is the second largest European source market for birdwatching tourism, according to industry experts. Although it is much smaller than the United Kingdom, it is one of the most rapidly growing markets. The Dutch Association for the Protection of Birds has 140 thousand members and is the fourth largest in the world. Around 40 thousand Dutch residents are active birdwatchers on different levels. Around 6 Dutch tour operators offer specialised birdwatching tours which together have some 1,500 bookings annually.

Tips:
- Focus on the United Kingdom and Dutch birdwatching tourism markets, as they are the largest in Europe.
- Advertise in the member magazines ‘Birds’ of the RSPB and ‘Vogels’ of the Vogelbescherming Nederland to promote your product among United Kingdom and Dutch birdwatchers.
- Work together with specialised birdwatching tour operators in the United Kingdom and the Netherlands, as they know there customers very well and can help you to fine-tune your product.

Birdwatching destinations

Although many European people remain within their own countries for birdwatching, they are increasingly travelling to long haul destinations to spot new birds that cannot be seen in their own country or region, especially endemic birds. Moreover, about 32% of the world’s bird species occur in South America, 28% in Asia and 24% in Africa, according to research conducted by Wheatley. This makes these regions very attractive for European birdwatchers.

Many traditional long haul birdwatching destinations are in Africa, with Kenya, Tanzania, Botswana, Uganda and Namibia being the most popular. Other traditional birdwatching destinations are India, Nepal, China and Japan. Less traditional birdwatching destinations that are emerging are South Africa, Morocco, Brazil, Costa Rica, Ecuador, Thailand, Sri Lanka, Kazakhstan, Georgia, Jordan and Oman. This means that there are opportunities for birdwatching tourism providers in Developing Countries, as long as they can offer quality birdlife.
Tips:

- Use popular birdwatching destinations such as Kenya as a benchmark. Research how they position themselves in terms of product range, quality and price. Try to distinguish yourself from them (e.g. by emphasising the presence of endemic birds in your area).
- Collaborate with local tourism boards, promotion organisations and other tourism stakeholders to develop an image as a birdwatching tourism destination. For example, try to have your destination covered in the press. Submit stories about your destination to bird/wildlife/nature magazines in your European target markets, place banners on popular bird/nature/wildlife websites in your European target markets, have a television broadcast on the National Geographic channel (or similar broadcasting outlets) or invite bloggers to write about your destination/products.
- Organise an active calendar of local birdwatching events or festivals to increase awareness of birdwatching opportunities in your destination, for example birding competitions. A good example is the World Birding Rally.

For information on tourism trade statistics and macro-economic indicators in the European market in general, refer to CBI’s ‘Trade Statistics’ for Tourism.

Which trends offer opportunities on the European market for birdwatching tourism?

Birdwatching as a hobby

An increasing number of people are interested in birdwatching as a hobby. In the United Kingdom, birdwatching has taken over fishing and is now the number one hobby. The United Kingdom has a specialised birdwatching fair that has been held for many years and draws more than 25 thousand visitors. Since two years, the Netherlands also has a specialised birdwatching fair.

Tip:

- Go to special birdwatching trade fairs, such as Birdfair in the United Kingdom and the Dutch Bird Fair in the Netherlands, to increase the awareness of your destination as a birdwatching destination, and promote your product among birdwatchers.

Bird photography

There is a growing trend of bird photography among birdwatchers, especially among older birdwatchers. As a result special bird photography trips are being developed. The pace of bird photography trips is generally slower than birdwatching trips and there is generally more individual freedom for bird photographers to have sufficient time to take photos.

Tips:

- Develop a special bird photography tour or add optional bird photography modules to existing birdwatching tours.
- Develop more small bird hides to enhance photographic opportunities.

Rise in birdwatching applications

The increasing use of smartphones and tablets has resulted in a rise in birdwatching applications (apps) that for example help identifying birds or map birding hotspots.

Tip:

- Develop a birdwatching apps that provides information about the birds and birding hotspots in your country/region to facilitate birdwatchers interested in your country/region.

For information on tourism market trends in the European market in general, refer to CBI’s ‘Trends’ for Tourism.
Which requirements should birdwatching tourism comply with in order to be allowed on the European market?

**Musts**

**No legal European requirements**

There are no legal requirements for long haul birdwatching tourism as it is offered outside the European market. There is a special law for the conservation of wild birds, the Birds Directive, which bans activities that directly threaten birds, such as the deliberate killing or capture of birds or the destruction of their nests. However, this law is only applicable for areas within Europe.

**Tip:**
- Study the *Birds Directive*. Although it is not applicable to areas outside of Europe, it can help you to better understand the European birding market and give you insights in how to make your birdwatching product more sustainable.

**Additional requirements**

**Sustainability**

Nature-based travellers, including birdwatchers, are generally more concerned about conservation and sustainability than general travellers are. Many birdwatchers are members of conservation or birding associations. They are often highly aware of how human actions affect birds and their habitats (e.g. based on information from membership organisations, bird magazines or documentaries). In addition, tour operators, especially in Western and Northern European countries, are increasingly looking for sustainable products and partners. Birdwatching tourism providers can use this to their advantage by making their products and operations more sustainable. The wide variety of labels that are available for the global, European and local markets can make it difficult to choose or recognise them. Examples of credible sustainable and/or green tourism certification programs include [Green Globe](#), [Rainforest Alliance](#), [STEP](#) and [Travelife](#). There are also local sustainability initiatives for example [CST](#) in Costa Rica which is an important birdwatching destination.

**Tips:**
- Become familiar with the requirements of sustainability certification in order to understand what suppliers are likely to expect. Consider integrating sustainable best practices into your products. Be sure to mention your concern for sustainability in your promotional materials. For additional information, refer to the CBI Product Factsheet on ‘European tour operators and their need for sustainable suppliers in developing countries’.
- Consider applying for sustainable certification to help you stand out from competitors. Find out whether your country has its own sustainability label, and apply for it. Make sure that the logo is visible on your website and that your company is visible on the website of the certification body.
- Adhere to requirements and insist on ethical birding behaviour (e.g. avoiding nests and young birds).
- For an overview of other relevant standards for tourism, consult the [ITC Standards folder](#).

For information on tourism buyer requirements within the European market as a whole, refer to the CBI publication on ‘European Buyer Requirements’ for Tourism.

What competition do I face on the European market for birdwatching tourism?

The quality of birdlife is the number one competitiveness indicator of a birdwatching destination. The quality of birdlife is related to several factors (Figure 2). Also general tourism indicators play a role, such as destination accessibility and connectivity, transport infrastructure, tourism infrastructure, market position, marketing presence and travel and tourism prioritisation.
Figure 2 Competitiveness factors for birdwatching tourism

<table>
<thead>
<tr>
<th>Total species of birds</th>
<th>Total endemic species of birds</th>
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<tbody>
<tr>
<td>Bird species diversity/richness</td>
<td></td>
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<tr>
<td>Number of (near/threatened) bird species</td>
<td></td>
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<tr>
<td>Number of endemic bird areas</td>
<td></td>
</tr>
<tr>
<td>Number of Important Bird Areas</td>
<td></td>
</tr>
<tr>
<td>Number of clearly defined birding routes</td>
<td></td>
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<tr>
<td>Number of Ramsar sites</td>
<td></td>
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<tr>
<td>Birding infrastructure</td>
<td></td>
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<tr>
<td>Accessibility (boardwalks, trails, hides)</td>
<td></td>
</tr>
<tr>
<td>Destination's birding tourism resources featured on National Tourism Organisation website</td>
<td></td>
</tr>
<tr>
<td>General biodiversity</td>
<td></td>
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<tr>
<td>Status of conservation activity</td>
<td></td>
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<tr>
<td>Share of protected areas</td>
<td></td>
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<tr>
<td>Number of total known species</td>
<td></td>
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<tr>
<td>Environmental treaty ratification</td>
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Source: Globally Cool, adapted from South African Department of Trade and Industry

Tip:
- Use the competitiveness factors in Figure 2 as a benchmark for analysing your destination’s and company’s competitiveness. Do the same for key competitor countries. This gives you a direction of where you should focus on in making your destination/company/product competitive and what to emphasize in your marketing activities.

For more information on market competitiveness on the European long-haul tourism market in general, refer to the CBI publication entitled ‘Field of Competition’ for Tourism.

In addition, consult CBI’s ‘Top 10 Tips for Doing Business with European Buyers’ to learn how to prepare your first contact with European buyers or how to improve your existing relationship with European buyers and gain a competitive edge.

What do the trade channels and interesting market segments look like in the European market for birdwatching tourism?

The trade structure for birdwatching tourism from Europe does not differ significantly from the trade structure for European tourism to developing countries in general. The most important trade channels for providers of birdwatching tourism in developing countries include local inbound tour operators, specialised tour operators, birding clubs and organisations, and direct sales. For an overview of the general trade structure for tourism, refer to Figure 1 in the CBI publication on ‘Trade Channels and Segments’ for Tourism.

Focus on specialised tour operators

International birdwatchers generally prefer specialised birdwatching tour operators and are less inclined to use general tour operators to organise their trip. As birdwatching tour operators offer a very specialised product that requires local knowledge, they are much more dependent on local partners than mainstream tour operators. Specialised birdwatching tour operators tend to work with inbound tour operators or Destination Management Companies that select travel packages for them. Also tour operators that are specialised in general wildlife or in nature tourism might be interesting trade partners.
Tips:
- Inbound tour operators and Destination Management Companies should approach specialised wildlife or nature tour operators in their European target market(s), preferably specialised in birdwatching. Birdwatching tour guides and accommodation providers should focus both on local tour operators and Destination Management Companies and on specialised tour operators in their European target market(s).
- Join domestic and international trade associations to gain access to networks with potential partners and increase your image as a reliable partner (e.g. the Association of Independent Tour Operators (AITO) in the United Kingdom and the Dutch Association of Travel Agents and Tour Operators (ANVR) in the Netherlands).

Business through birding clubs and organisations

Some European birdwatchers are organised in groups (e.g. in birding clubs, conservation organisations and ornithological organisations). Such clubs and organisations often organise birdwatching trips for their members to specific sites all over the world.

Tips:
- Offer attractive tours to birding clubs, conservation organisations or ornithological organisations in your European target markets (e.g. the Royal Society for the Protection of Birds (RSPB), the African Birdclub, the Neotropical Birdclub and the Oriental Birdclub in the United Kingdom and Vogelbescherming in the Netherlands).
- Advertise in the magazines or on the websites of birding clubs and organisations in your European target markets, as they offer direct access to potential customers.

Direct sales

In the birdwatching market, travellers are increasingly booking directly with local tour operators, this especially counts for twitchers. It is estimated that of international birdwatching travellers, between one and two thirds organise their own trips. Birdwatchers often choose a birdwatching destination based on its birdwatching reputation. Experiences from other birdwatchers play a large role. Costa Rica for example, is an increasingly popular birdwatching destination, mainly because of good word-of-mouth marketing from other birdwatchers. Birdwatchers are a small community and many people run into each other during birdwatching, either at home, on a birdwatching event or during a holiday. Also social media (e.g. online forums and communities) and birding clubs and organisations appear to play an important role for destination inspiration of individual birdwatching tourists.

Tips:
- Have a professional, high quality website with quality photos and videos.
- Use online forums, communities and social media to promote your destination and products. For example, Biaa Bird Forum (United Kingdom), Birdforum (global), Birdtours (United Kingdom), Birding United Kingdom (United Kingdom), Birdpix (the Netherlands), Chatterbirds (United Kingdom), Surfbirds (United Kingdom and USA) and Vogelaar Begint Hier (the Netherlands).
- In addition, ask current customers to share their birdwatching pictures and stories on online forums, communities and social media, in order to enhance your message.
- Use bird/wildlife/nature magazines or professional bloggers in your European target market to promote your products among wildlife enthusiasts (e.g. the United Kingdom magazine Birdwatch).

For information on tourism market channels and segments in the European market in general, refer to CBI’s ‘Trade Channels and Segments’ for Tourism.

In addition, refer to the CBI publication on ‘Finding Buyers’ for tips on locating buyers in the European market.
Useful sources

- Birdlife International - http://www.birdlife.org - global partnership that strives to conserve birds, their habitats and global biodiversity. Provides interesting publications about birds.
- British Birding Association - http://bbabirding.blogspot.nl - provides news about the British birdwatching market.
- Dutch Birding - http://www.dutchbirding.nl - Dutch birding forum with bird news and an overview of birding events.
- Royal Society of the Preservation of Birds (RSPB) - http://www.rspb.org.uk - provides information about the United Kingdom birdwatching market, such as news, articles and facts and figures.
- Where to Watch Birds and Other Wildlife in the World - http://www.wheretowatchbirdsandotherwildlifeintheworld.co.uk - global bird forum with trip reports and overviews of local guides, accommodation and tour companies by region.

For all CBI market-intelligence documents relating to tourism, visit the CBI ‘Market Intelligence Platform for Tourism’.