

# Entering the European market for bird watching tourism products

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The United Kingdom is the largest bird watching market in Europe, followed by the Netherlands and Germany. The market for specialist tour operators is extensive in the UK, and they lead bird watching trips to a wide range of countries. Conservation and sustainability are important issues for European birders, and it is important that any bird watching travel product has good sustainable credentials. Using local guides and experts who can identify the birds in their destination, promote appropriate behaviour while bird watching and know the best places to see them are crucial to develop successful bird watching products.

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## 1. What requirements must bird watching tourism products comply with to be allowed on the European market?

European tour operators selling bird watching products on the market are bound by strict regulations to ensure the safety of their travellers and to protect them financially. You should understand what these regulations are.

### What are the mandatory and additional requirements that buyers have?

The requirements that European tour operators have for wildlife tourism products in developing countries cover the following:

- The European Package Travel Directive
- General Data Protection Regulation (GDPR)
- Liability Insurance and Insolvency Protection

As a first step, you should read the CBI's [What requirements must tourism services comply with to be allowed on the European market](#) and familiarise yourself with the comprehensive details of legal, non-legal and common requirements.

### COVID-19: Preparing to reopen following the pandemic

At time of writing in March 2021, the COVID-19 pandemic continued to have a considerable impact on the tourism industry worldwide. Travel restrictions are set to continue in many countries across Europe, including the United Kingdom, Germany, the Netherlands and France. European governments continue to advise their

nationals against all but essential travel abroad, and countries within and outside Europe continue to impose quarantine periods on inbound travellers.

To keep informed of the situation in Europe, you can browse the internet for articles like this one on the BBC website, [Covid: How are European countries tackling the pandemic?](#), which offers up-to-date information. International travel regulations are changing regularly, so to keep informed, consult IATA's [interactive travel restrictions map](#). You should also be aware of the restrictions in your own country and keep checking in the event of any developments.

However, as national vaccination programmes around the world gather pace, the tourism industry is optimistic about recovery in the second half of 2021. Domestic tourism will be the first segment to recover. In the short term, this offers local tour operators the chance to reach out to local markets. This is likely to be followed by increased travel to short haul destinations. For Europeans, this means travel to a neighbouring country on the continent.

Long haul travel to developing countries is likely to recover more slowly, and decisions to travel abroad will depend upon conditions of entry imposed on visitors and safety protocols. Research shows that demand for travel is very high in Europe, particularly among adventure travellers. A survey in early 2021 among British and American tourists found that [70% plan to take a holiday this year](#), but that COVID-19 worries are their biggest concern. Being able to travel safely, being vaccinated, low infection rates in the countries they want to visit and the availability of COVID-valid travel insurance are highly likely to impact upon travel decisions.

You should use this 'down time' to prepare your travel product for a European market that is keen to travel but will need reassurance that there are excellent safety protocols and cleanliness measures in place to keep them safe. You must also establish new booking terms and conditions and clearly state what cancellation terms and waivers you will offer to your buyers during the pandemic.

Consult the CBI study, [How to respond to COVID-19 in the tourism sector](#) for tips on preparing for the future recovery of the tourism sector. The study includes detailed information about revising terms and conditions to help you revise yours.

The World Travel & Tourism Council (WTTC) has launched a new set of measures to rebuild consumer confidence, reduce risk and encourage travel to resume. The measures were developed with other partners including the Adventure Travel Trade Association (ATTA). Some of the measures developed include:

- Reducing numbers of participants to allow for social distancing
- Ensuring activity difficulty levels are not above ability, to reduce the need for rescue services
- Providing clear, consistent and up-to-date communication on health and hygiene protocols
- Providing clear information in advance and on arrival of protocols such as wearing of face masks, hand hygiene guidance and social distancing requirements
- Encouraging online sales wherever possible
- Encouraging guests to handle their own equipment for the whole trip
- Limiting queuing and physical contact wherever possible

You can download WTTC's [Tour Operators - Global Protocols for the New Normal](#) for more details about the measures and decide whether to apply for the ['Safe Travels' Stamp Application](#).

Together with some major international tour operators, ATTA has published a range of insights and frameworks to help local tour operators reopen tourism safely. Download the [COVID-19 Health and Safety Guidelines](#) to see what you can adopt for your business.

For the remainder of this report, all discussion, insight and advice has been provided on the basis of travel in normal circumstances.

## What are the requirements for niche markets?

### Requirements for a bird watching destination

The presence of interesting bird life is the key requirement for a bird watching destination and it is important that you know about the resident bird life in your region.

- An iconic species will help to bring your destination to the forefront of the birding community and will attract large numbers of casual birders with an interest in native bird life.
- An endemic species (which means it is only found in a particular region/area/country) will attract the enthusiastic and hardcore bird watcher who wants to tick a bird or birds off his or her list.
- Migratory species are also appealing, particularly those in large numbers. However, the behaviour of these birds is usually seasonal.
- The presence of large numbers of identifiable species are appealing to European tour operators as they will help 'sell' their bird watching holidays.

South America, Asia and Africa are all excellent destinations for bird watching. The biodiversity within these regions make exceptional habitats for vast numbers of bird species. The table below provides an indication of the high diversity of bird life in the top 20 countries for numbers of bird species, showing that Colombia, Peru and Brazil have the highest bird diversity in the world, while Indonesia has the greatest number of endemic species.

Table 1: Countries in the World with the most Bird Species

Rank	Country	Continent	Total Bird Species Count (Number of endemics)
1	Colombia	South America	1,878 (91 endemic)
2	Peru	South America	1,858 (133 endemic)
3	Brazil	South America	1,813 (252 endemic)
4	Indonesia	Asia	1,711 (516 endemic)
5	Ecuador	South America	1,622 (42 endemic)
6	Bolivia	South America	1,438 (20 endemic)
7	Venezuela	South America	1,394 (52 endemic)
8	China	Asia	1,288 (69 endemic)
9	India	Asia	1,211 (74 endemic)
10	Democratic Republic of the Congo	Africa	1,107 (14 endemic)
11	Mexico	North America	1,104 (116 endemic)

12	Tanzania	Africa	1,075 (33 endemic)
13	Kenya	Africa	1,058 (12 endemic)
14	Myanmar	Asia	1,031 (9 endemic)
15	Argentina	South America	1,004 (16 endemic)
16	Uganda	Africa	999 (1 endemic)
17	Thailand	Asia	934 (3 endemic)
18	Sudan	Africa	917 (1 endemic)
19	Angola	Africa	915 (17 endemic)
20	Cameroon	Africa	885 (6 endemic)

Source: Rainforests Mongabay/([Our World in Data](#))

You should research what birds can be seen in your destination and the best places to view them. Provide clear and detailed information about resident species to inform your European tour operator partners and independent birders, and emphasise any iconic, endemic, rare or endangered species that they should look out for.

You should also be aware of the number of threatened or near-threatened bird species in your area and be able to talk knowledgeably about the issues. You can explore bird life in your destination using the [BirdLife International Data Zone](#) tool. The table below lists a selection of some of the world's iconic, endemic and well-known bird species.

Table 2: Examples of Iconic, Endemic or Well-Known Bird Species by Continent

World: 10,000 – 18,000 bird species		
Africa	Asia	Central/South America

<p> African fish eagle  African masked weaver  African pygmy kingfisher  Böhm's bee-eater  Collared sunbird  Common ostrich  Eurasian golden oriole  Flamingo  Great cormorant  Grey crowned crane  Grey go-away bird  Helmeted guineafowl  Hooded vulture  Kori bustard  Lappet-faced vulture  Lesser striped swallow  Lilac-breasted roller  Little bee-eater  Malachite kingfisher  Marabou stork  Red-billed firefinch  Red-billed quelea  Rüppell's starling  Sacred ibis  Saddle-billed stork  Secretary bird  Shoebill bird  Silvery-cheeked hornbill  Swainson's francolin  White-faced duck  White-fronted bee-eater  White-headed mousebirds  Yellow-billed hornbills  Yellow-billed oxpeckers  Yellow-billed storks </p>	<p> Bird of Paradise  Blue-faced malkoha  Blue-headed pitta  Bornean-banded pitta  Chestnut-shouldered petronia  Egyptian vulture  Fire-tufted barbet  Golden pheasant  Great argus  Greater racket-tailed drongo  Green magpie  Griffon vulture  Himalayan woodpecker  Indian peacock  Indian roller  Indian skimmer  Little spiderhunter  Malay banded pitta  Male knob-billed duck  Maleo  Manchurian crane  Oriental pied hornbill  Philippine frogmouth  Red-bearded bee-eater  Red-breasted parakeet  Red-crowned crane  Rufous-bellied niltava  Rufous-capped babbler  Rufous-chinned laughing thrush  Rufous-collared kingfisher  Rufous-necked snowfinch  Spot-billed ducks  Spot-winged starling  Sri Lanka blue magpie  Stellar's sea eagle  White-browed fulvetta  White-crested laughing thrush  White-crowned pheasant </p>	<p> Andean cock-of-the-rock  Andean condor  Blue and yellow macaws  Blue-footed booby  Booted racket-tail  Capped heron  Capuchinbird  Caribbean flamingos  Cinnamon hummingbird  Crested quetzal  Curl-crested aracari  Eared quetzal  Emerald-bellied puffleg  Giant hummingbird  Glittering-bellied emerald  Golden-headed quetzal  Harpy eagle  Hyacinth macaw  Inca tern  Keel-billed toucan  King penguin  Lear's macaw  Long-tailed sylph  Magnificent frigates  Marvellous spatuletail  Military macaw  Red-footed booby  Resplendent quetzal  Roseate spoonbill  Royal sunangel  Rufous-crested coquette  Scarlet macaw  Scarlet-banded barbet  Sun parakeet  Three-wattled bellbird  Toco Toucan  Trogon  Violet sabrewing  Waved albatross  White-bellied hummingbird  White-fronted Amazon parrot  White-necked jacobin </p>
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When you are preparing suitable bird watching tourism products for the European market, consider whether you could include some or all of the following:

- Ensure that birding activities and routes are accessible and suitable for the type of bird watching tourist. For instance, a casual birder may prefer to travel short distances to see a wider range of more common species. However, a hardcore birder may be more focused on ticking off the rare species that are harder to spot in a destination that is more remote.
- Ensure there is suitable infrastructure for viewing wildlife such as bird hides, observation towers, canopy walks and trails, and boat trips if your destination is coastal or on a lake/riverside.
- Create some large information boards on the biology of birds in your region that includes information about their habitats, migratory and breeding patterns and conservation/preservation efforts that are being undertaken in your area/region.
- Be sure to tell your visitor what sort of binoculars they should bring, based on the location. 10 x 45 are best for jungles, which need as much light as possible. If you can offer to lend binoculars this will add value to your offer, especially for the casual birder who may not possess specialist birding equipment.
- In addition, you could record bird sounds to play to your guests before the trip so they can identify them more easily in the field.
- Consider offering a birding checklist to your clients featuring not only the birds, but also any interesting animals and/or plant species they might expect to see on the tour.
- Establish a calendar that shows the best time to visit for each species, particularly if your destination lies on a migratory route.
- If bird watching is not possible all year, offer trips that focus on nature or wildlife so that you can appeal to general wildlife tourists. For more information about wildlife tourism, download the CBI study, [What are the opportunities on the European Wildlife Tourism market](#).
- Identify local festivals and other events that are focused on birds and wildlife and promote these to your visitors.
- Display local arts, crafts and stories about local bird life and local conservation efforts.

## **Establish conservation and best practice policies**

Conservation of habitat and preservation of species is the most important consideration for a birding destination and birders are often more concerned about conservation and sustainability than other groups of visitors. It is important to demonstrate what eco-friendly activities you are doing to promote best conservation practice in your business. If you sell your bird watching trip to European tour operators, they will also want to be sure that you are actively working to protect the birds that live in your area and conserve the habitat.

Familiarise yourself with some of the international organisations that are concerned with the welfare, conservation and preservation of birds worldwide. [BirdLife International](#) is a global partnership of conservation non-governmental organisations (NGOs) that works to conserve birds, their habitats and biodiversity around the world and is the leading authority on the world's birds and the issues that affect them. It provides detailed information on every bird species in the world and its status on the International Union for the Conservation of Nature (IUCN) Red List, by category listed below.

Figure 1: The IUCN Red List Categories



# THE RED LIST CATEGORIES

## Extinct



**Extinct (EX):** no reasonable doubt that the last individual has died

**Extinct in the Wild (EW):** known only to survive in captivity, cultivation or well outside its natural range

**Critically Endangered (CR):** facing extremely high risk of extinction in the wild

## Threatened



**Endangered (EN):** facing a very high risk of extinction in the wild,

**Vulnerable (VU):** facing a high risk of extinction in the wild.

**Near Threatened (NT):** close to qualifying, or likely to qualify for a threatened category in the near future



## Least Concern



**Least Concern (LC):** population is stable enough that it is unlikely to face extinction in the near future

**Data Deficient (DD):** not enough information on abundance or distribution to estimate its risk of extinction

Source: BirdLife/IUCN

British charity the Royal Society for the Protection of Birds (RSPB) is the largest conservation charity in the United Kingdom and works closely with BirdLife International in Africa and Asia. You can read more about the charity's [International Conservation Projects](#) to see if there are any in your region.

You should ensure that your visitors are aware of your best practice policies and establish your own Bird Watcher's Code of Conduct that covers the following:

- Welfare of the birds comes first – this is the most important factor that all birders must adhere to, whether their interest is photography, sound recording, scientific study or just bird watching.
- Habitat protection – to ensure that visitors' activities do not cause damage.
- Keep disturbance to a minimum – while birds' tolerance of disturbance varies between species and season, it is best that all disturbance is minimised. This includes disturbing nests as it may allow predators to take eggs or young chicks, chasing birds to get a better look, or trying to attract them using an audio recording.
- Do not collect any biological material – whether old nests, plant samples, broken eggs and so on.
- Keep to the marked trails – to ensure the environment is protected and maintained for birds and wildlife
- Camping is not allowed – ensure visitors are informed where they are able to camp.
- Wear suitable clothing and footwear for the conditions – such as wet weather gear, long trousers, sturdy walking boots or shoes. Neutral colours are often a good idea, so you blend into the natural surroundings.

The [Code of Birding Ethics](#) developed by the American Birding Association (ABA) offers guidelines on how to promote respectful and thoughtful birding. You can download a pdf of the Code in English, Spanish or French.

## Sustainability in bird watching tourism

Bird watching tourism activities should be developed under sustainable, responsible and ethical principles so there is minimal negative impact on the resident bird and wildlife, environment and communities. You should also manage your business sustainably, and make sure that you encourage your guests to travel responsibly.

For tour operators, there are several sustainable certification schemes that you could consider applying to for your business. The [Global Sustainable Tourism Council \(GSTC\)](#) manages the global standards for sustainable travel and tourism and acts as the international accreditation body for sustainable tourism certification. It has schemes for tour operators, hotels and accommodation providers, and destinations and governments. GSTC also recognises schemes as aligned with the [GSTC Industry Criteria for Tour Operators](#), including [Travelife for Tour Operators](#), and [Green Destinations](#) for destination managers and government bodies.

Some countries like [Costa Rica](#) have their own sustainability schemes. Other countries issue sustainability guidelines to support practices of inbound tour operators and accommodation providers, such as India's [Sustainability Tourism for India](#). To find out whether there are similar schemes or guidelines in your country, consult the website of your Ministry of Tourism and/or National Tourist Board to see what publications might be available.

For more information about sustainability for your tourism business, consult the CBI study, [Entering the European market for nature and ecotourism](#), which has detailed information about the sustainability certification schemes on the market.

## Ensure birder friendly accommodation and facilities

If your business provides accommodations, it can be simple but needs to be attractive and well-managed under sustainable principles. It should also be 'bird friendly', with carefully placed feeders and natural landscaping.

Accommodation should be suitable for birders who, depending on the best time of day for bird watching, may behave differently than other tourists. For instance, dawn and dusk are sometimes the best times to view certain species, so consider offering early breakfasts and/or be flexible about mealtimes. Meals should be provided using local produce wherever possible.

Most enthusiastic and casual bird watching groups will be content with basic yet clean and secure accommodation facilities, although there should be other activities available to them during down times. Most birders are also interested in the local culture and will enjoy cultural tours, workshops run by local communities, archaeological excursions or other wildlife watching activities.

## Provide knowledgeable guides

The best bird watching trips are accompanied by guides that are knowledgeable, personable and inspirational. Good guides have become an essential component of a birding trip. They must be professionally trained and have excellent knowledge about the birds that can be seen at your destination, such as behaviour and historical information.

BirdLife International offers bird guide training in multiple areas and you should contact your [local BirdLife office](#) to see if they offer any training in your country. The Africa Institute of Tourism and Field Guiding offers a [Bird Guide Training Course](#) that has three levels.

Guides must be able to speak the language of the visitors to a good level. If they are also knowledgeable about the local flora and fauna it will positively impact the birders' experience. A local photography expert may also add value to a birder's experience.



### Tips:

Undertake thorough research in your destination so you are familiar with all the most important bird species in the region.

Identify any local conservation and/or other birding organisations such as BirdLife and ask whether there is any support or useful information available to you.

Find out if there are any established birding routes and whether they are easily accessible from your business location.

Think about what other tourism activities that will add value and attract customers could be easily linked to your birding project.

Create a network of local partnerships with other tourism services such as accommodation, restaurants and transport services.

## 2. Through what channels can you get bird watching tourism products on the European market?

### How is the end-market segmented?

Bird watchers from Europe are mostly aged between 40 and 70, are well-educated, affluent and interested in other wildlife as well. It has been widely reported that bird watching is becoming more popular among younger generations, particularly those aged between 35 and 44. The United Kingdom and the Netherlands are the largest markets for birding in Europe. Most bird watchers are likely to be members of their local bird watching association such as the RSPB, the largest wildlife conservation charity in Europe with more than one million members.

Table 3: Profiles of European Bird Watchers

European Birder Profiles
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### *Hardcore Birders*

Represent 10% of the bird watching market and are predominantly male. Dedicated bird watchers with a desire to see as many birds as possible and are prepared to travel long distances to do so. Less interested in taking part in other activities during a bird watching trip.

### *Enthusiastic Birders*

Accounting for around 50%, this group is broadly split equally between male and female. They are both bird and nature lovers with a good knowledge of the destination. They like to relax and enjoy other activities such as cultural heritage tours. They spend more on birding tours and equipment than other birder types.

### *Casual Birders*

An estimated 40% of the bird watching market, this group is interested in other outdoor and nature-based activities such as hiking and wildlife watching. This group offers much potential for growth as they could be persuaded to include birding as an additional activity.

Source: Acorn Tourism Consulting

The most important profiles for you to consider are the Enthusiastic and Casual birders. Hardcore birders have very specific needs and will typically make their own arrangements. However, there may also be opportunities to reach tourists from other tourism niches. For instance, a tourist on a sun and beach holiday may choose to join an excursion to a bird sanctuary or wildlife park. An independent tourist staying in an ecotourism lodge may take an interest in specific birding activities if they are available at the property. Domestic tourists are another key group that may be interested to learn more about the native birds in their homeland if the opportunity is presented to them.

Figure 2: Types of Tourist that may be interested in Birds and Wildlife as part of a Broader Holiday Experience

**Reason for travel:** To watch birds

**Spend profile:** -

**Major markets:** USA, UK, Europe and Australia

**Demographic profile:** Older, affluent, often travelling alone or as part of a specialist group

**Attracting them:** Highlighting birds and the wildlife opportunities in your area, especially rare species. migration, high diversity of species or easily observable wildlife. Log book of sightings.

**Bird watchers**



**Reason for travel:** To experience nature


**Spend profile:** \$\$\$\$

**Major markets:** USA, UK, Europe and Australia

**Demographic profile:** Urban, 30-55's, affluent, travelling independently or with a small specialist operator.

**Attracting them:** Wildlife spectacles, (eg: migration spectacle) easily accessible and observed wildlife.

**Nature lovers (ecotourists)**



**Reason for travel:** To experience different cultures and the great outdoors

**Spend profile:** \$-\$\$\$\$

**Major markets:** USA, UK, Europe and Australia

**Demographic profile:** Affluent, 25-40's professional, often travelling in couples. Usually travelling independently or with a specialist operator.

**Attracting them:** Authentic experience, story-telling opportunities to experience the real destination

**Independent/responsible travellers**



**Reason for travel:** To have a new experience, to relax and enjoy the scenery.

**Spend profile:** \$-\$\$\$

**Major markets:** UK and Europe

**Demographic profile:** Couples, families, group tours, 30+. Usually travelling with a mainstream operator.

**Attracting them:** Promote opportunities to explore bird and wildlife as a part of the broader experience. Wildlife spectacles, (eg: migration movements) easily accessible and observed wildlife. Wildlife log books for tourist use.

**Tourists taking excursions**



**Reason for travel:** To relax in vibrant, attractive and well managed environments

**Spend profile:** \$\$-\$\$\$\$

**Major markets:** UK and Europe

**Demographic profile:** Couples, families, group tours, 30+. Usually travelling with a mainstream operator.

**Attracting them:** Provide bird feeders, kids club activities, wildlife identification cards.

**Tourists in their hotels**



**Reason for travel:** To visit friends and relatives, take a short break.

**Spend profile:** \$

**Major markets:** Domestic, cities within a 2 hour drive.

**Demographic profile:** Generally younger often family groups. Often city dwellers returning to an area with which they are already familiar.

**Attracting them:** Stories, unique attributes, reiterate links with local culture, festivals and other options to view iconic species.

**Domestic tourists**



## Tip:

For additional market information, consult other CBI tourism studies including [Nature and Ecotourism](#), [Sun and Beach Tourism](#) and [Wildlife Tourism](#), as they are closely aligned with or may be combined with bird watching tourism.

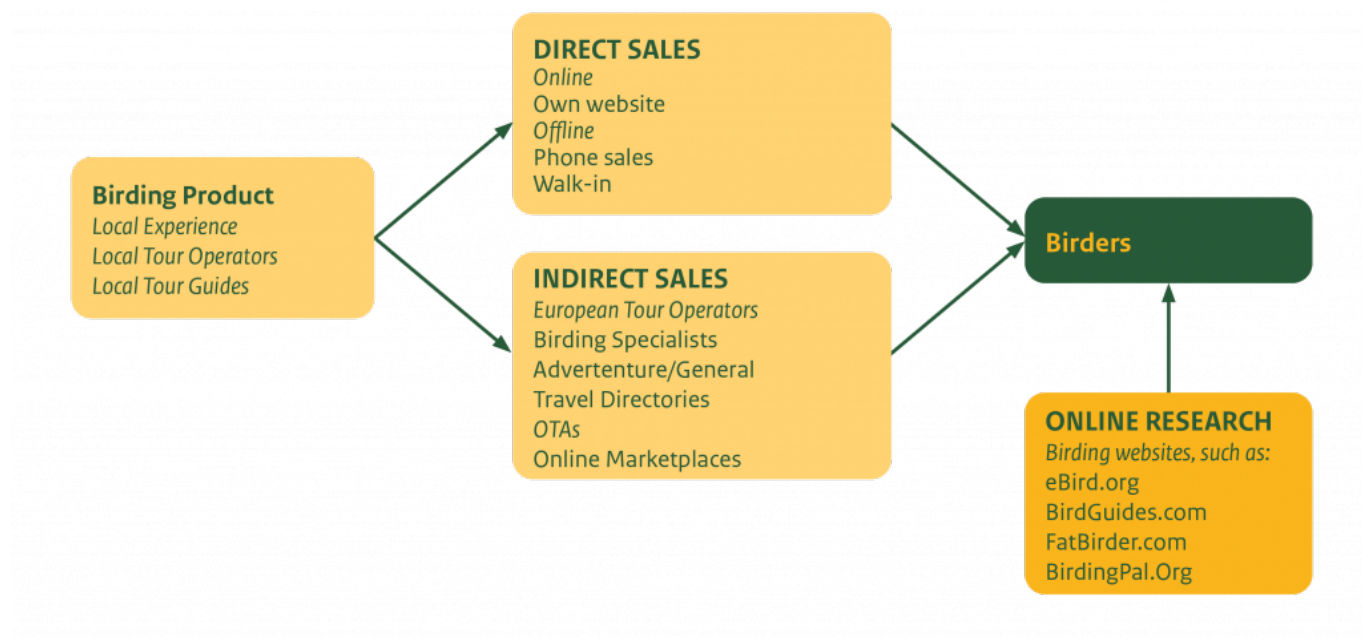
## Through what channels do bird watching tourism products end up on the end-market?

Sales channels used by birders vary according to traveller type. Hardcore birders have specific needs and are likely to use specialist birding tour operators or make their own plans if they are looking for a particular species. They are also more likely to travel with a specialist guide who is either the European tour operator or contracted to the operator.

Enthusiastic and Casual bird watchers are more likely to use traditional sales channels of specialist, adventure or general tour operators that may or may not include other activities within the trip. Fully Independent

travellers (FITs) who make their own plans may use a combination of sales channels including Online Travel Agents (OTAs) and direct sales.

Figure 3: Sales Channels for Bird Watching Tourism Products



Source: Acorn Tourism Consulting

An explanation of the major channels is as follows:

- Specialist Birding Tour Operators – are usually smaller tour operators and are often managed by specialist birders who also lead the tours. They are highly experienced and know the market for birding tours well. Usually, they work to an annual tour listing that takes into account seasonality around migration, breeding and the optimal seasons to travel to a region. Most operators run one or two trips a year to each destination.

The United Kingdom and the United States are the major markets for specialist birding operators, but as they travel globally, they reach the European market. Examples include United Kingdom-based [Sunbird](#), [Birdquest Tours](#) and [Bird Holidays](#), Dutch-based [Birding Breaks](#), and [Rockjumper Birding](#), one of the largest specialist operators and based in South Africa/Mauritius, but catering to a global audience. [Gambia Birding Experience](#), based in the Netherlands, offers birding and photography experiences in the Gambia and Senegal and was jointly founded by two birding experts from the Gambia and the Netherlands.

- Birding/Wildlife, Adventure and General Tour Operators – the European market for tour operators is very competitive. Wildlife trips are common and often include iconic bird life or species that can be commonly seen on the list of species to watch out for. [Think Galapagos](#), [Wildfoot](#), and [The Travelling Naturalist](#) all offer wildlife and birdwatching trips.
- Online marketplaces – are often used to research tour operators' trips to find the right one. [Blue Sky Wildlife](#) is a directory of bird watching and wildlife tours, ecotourism holidays and day trips provided by wildlife tour operators. Currently, more than 60 tour operators from all over the world sell their trips on the website. [Responsible Travel](#) also promotes a range of wildlife and bird watching holidays.
- Online Travel Agents (OTAs) – OTAs are the fastest selling online channels for travel experiences. [Viator](#) is the world's largest, owned by Tripadvisor and lists Bird Watching as a search option. Airbnb Experiences has recently introduced [Animals on Airbnb Experiences](#).

### Tip:

Research which OTAs are most suitable for your business. [95 Places to List Your Tours](#) and [10 Best Online Tour Booking Sites to List Your Tours, Activities and Experiences](#) are good places to start. Bear in mind that the OTA marketplace is fast moving and some OTAs may no longer be operating, and new ones may be on the market.

## What is the most interesting channel for you?

European tour operators, OTAs and FITs are the most interesting sales channels.

To find and do business with European tour operators, download the CBI studies, [10 tips for finding buyers on the European tourism market](#), and [10 tips for doing business with European tourism buyers](#).

The market for OTAs is growing and changing on a fast-moving basis. There are several online guides on how to do business with OTAs, such as this one, [Working with OTAs](#).

The COVID-19 pandemic has led to an increase in the use of online services across many sectors, including tourism. This means that more people are using the Internet to research, plan and book their trips, and this trend is set to continue as the pandemic eases. Therefore, tour operators must consider providing access to online booking facilities, whether through your own website or through an aggregator like an OTA.

If you want to attract FITs, you should think about the online presence of your business. If you don't have a website, consider building one. If you do have a website, undertaking an assessment of how your website performs is a good task to do during downtime. Download the CBI study [How to be a successful tourism company online](#) for advice.

### Tips:

Find out how to list your business on [Blue Sky Wildlife](#) and/or [Responsible Travel](#).

For more information about the FIT market, read the CBI study, [What are the opportunities in the European FIT tourism market](#).

## 3. What competition will you face in the bird watching tourism market?

### Which countries are you competing with?

In the short term, when national lockdown conditions are lifted, European culture tourists will travel to domestic locations or to short-haul destinations within Europe, visiting countries they are able to travel to without any quarantine restrictions. During 2021, travel to long-haul destinations is likely to be limited until the summer/autumn season when it is hoped the pandemic will have eased sufficiently to enable more widespread international travel.

There are numerous excellent destinations for bird watching throughout Africa, Asia and Central/South America. Those countries with high levels of diversity are obvious contenders for competing destinations as Enthusiastic

and Casual birders will want to see many species on one trip. As they will use the Internet widely to research their trip, a search for the 'best destination for bird watching' will typically produce results most commonly featuring the destinations in the table below.

Table 4: Best Destinations for Bird Watching Holidays

Africa	Asia	Central/South America
Ethiopia	Bhutan	Belize
Gambia	India	Brazil
South Africa	Indonesia	Colombia
Tanzania	Nepal	Costa Rica
Uganda	Papua New Guinea	Ecuador/Galapagos Islands
Zambia	Sri Lanka	Peru

Source: Internet Research March 2021: 'Best Bird Watching Destinations'

You should consider all these destinations as competing bird watching destinations. The countries of Brazil, Colombia, Gambia, Papua New Guinea, Peru and Sri Lanka are profiled as key competing destinations.

## Brazil

Brazil has a number of excellent bird watching areas including the Pantanal, an extraordinary ecosystem that is home to more than 1,000 bird species and its isolated position offers some protection. Highlights include the jabiru, greater rheas and more than 24 species of hawks, eagles, kites and occasionally, nesting harpy eagles. The Atlantic coast in southern Brazil with its varied altitudes allow for a vast array of bird life including almost 200 endemics.

Bird watching is recognised as important to protect the country's high diversity, second only after Colombia, and protect natural environments from destruction. [WCS Brazil](#) (Wildlife Conservation Society) established the Birds of Brazil Project with the aim of using bird watchers as a means to help protect the bird diversity and increase birding tourism as a viable and sustainable environmental activity. Training birding guides was also part of the project, along with encouraging community participation in bird and environmental protection activities. The organisation has also had success in restoring populations of the hyacinth macaw to healthy numbers.

## Colombia

Colombia is 'the birdiest country on Earth', and since the country is becoming more stable and peaceful, birding has become one of Colombia's top tourism exports. Of the almost 2,000 bird species in Colombia, 80 are endemic. Bird diversity in Colombia is very high and accounts for approximately 20% of all bird diversity worldwide. It also has the greatest diversity of hummingbirds in the world, with 165 species of the 355 that live on the American continent. There are also 24 species of toucan; 57 types of colourful parrot and macaw; six of the world's seven vulture species; and many kingfisher, trogon and warbler species.

Birding has been identified as an important niche for tourism development. The [Northern Colombia Birding Trail](#)



project was developed in 2018 by American organisation Audubon in conjunction with Colombian country partner Asociación Calidris and funded by USAID. The programme also involved training local guides, developing English speaking guides and working alongside local communities to conserve birds and habitats through bird-focused tourism. Audubon's commitment to investing in training local, young guides is a further key activity to support development and prevent habitat destruction, as evidenced in this article by BirdLife International, [Building birding trails in Colombia – before loggers can get there](#).

## **Gambia**

Gambia is home to some of Africa's most colourful and diverse bird life with more than 600 species. Bird watching is relatively easy to do as the country is small and distances between sites are manageable. There are a variety of habitats including salt marshes, wetlands, mangroves, tropical forest and semi-desert. Birds of prey, colourful parrots, bee-eaters and several migratory species can be found in Gambia.

Almost all hotels and lodges organise some form of bird watching activity, whether on the property or excursions outside. The best time to view migratory birds from Europe and Africa is from October. The breeding period is from May to October when bright feathers and mating displays are at their best, although the rainy season makes some regions less accessible.

## **Papua New Guinea**

With a lack of predatory species, Papua New Guinea has very high diversity of bird life, with 780 species and 76 endemics that live in fertile and inaccessible highlands, or its tropical islands. Birds of Paradise are Papua New Guinea's most famous bird, of which there are 34 species, all with extravagant plumage and colours. Most birding trips in the country are guided in small groups (less than 12) by specialist groups that help to minimise the impact on the environment and local villages.

Birding is an important tourism activity in Papua New Guinea and many other trips include some form of bird watching, which are particularly appealing for Enthusiastic and Casual birders. Although there are no migratory species in Papua New Guinea, tourism to the country is seasonal on account of the weather and the best time to visit is between April and October.

## **Peru**

Peru is home to 19% of the world's bird species and the most popular destination for birders is the Manu National Park. Like Colombia, the country has a diverse range of bird watching areas from cloud forests and the Amazon, Pacific coastal spots and the Sacred Valley. Colca Canyon is the best place to see the Andean condor, also Peru's national bird.

Figure 4: Andean Condor at Canyon del Colca



Source: Loïc Mermilliod, Unsplash

Bird watching tourism in Peru is an ecotourism activity and there are a wide range of birding and ecolodges with knowledgeable guides. The Tambopata National Reserve is a conservation hotspot in southern Peru and home to 600 bird species including hundreds of colourful macaws, which feed from steep clay licks. Other highlight species include the Andean cock-of-the-rock; scarlet-banded barbet; long-whiskered owlet and marvellous spatuletail.

Ecotourism in Peru is often managed by local communities who run successful lodges and provide bird and wildlife watching trips in the Peruvian Amazon. The Ese Eja Native Community of Infierno and Peruvian operator Rainforest Expeditions jointly manage the Posada Amazonas Lodge, located on land on the banks of the Tambopata River that was returned to the community in the 1970s. It has proved a highly successful venture and the long-term goal is 100% community management.

## **Sri Lanka**

As a small country, Sri Lanka has extremely diverse bird life with 439 species of which 11% are endemic, a figure that is considered high. It is well-known as a worthy birding destination to view high numbers of endemics and exotic photogenic birds. It is also located on a migratory route for terrestrial and sea birds heading south from as far north as Siberia.

Sri Lanka's main bird sanctuary is the Kumana National Park, while the Bundala National Park on the country's southern tip hosts huge flocks of flamingos, herons and storks. Most bird watching happens in the south of the country, which offers a variety of habitats from rainforests full of endemic species, high cloud forests and savannah.

### **Tips:**

Research the bird watching tourism segment in your country and see what local conservation

organisations exist to see if there are any projects you could link with.

To learn how other destinations are developing birding tourism, read this study by the Tourism Council of Bhutan, [Taking Tourism to the Top – Birding Tourism Feasibility Study Report 2020](#).

## Which companies are you competing with?

Europe has been hit very hard by COVID-19 and is one of the worst affected regions in the world. You must work hard to reassure European travellers that you have robust cleanliness protocols in place to keep them safe. It is their biggest concern about travelling to other countries. It is essential that you are very clear about the measures you have introduced and specify what they are on the homepage of your website or provide a prominent link to a special COVID page.

You can see how European tour operators feature detailed and clear information about how they will keep their customers safe, and in many cases, it is the first thing that visitors see when they click through to the homepage. Look at these examples:

- [Birdfinders](#) – features a message directly on its home page advising customers of the current situation. Look out for the sentence regarding the possibility of ‘vaccination passports’ being introduced. This provides some indication of the issues facing European travellers.
- [Birdwatching Trips](#) – also has lots of information on its homepage. It has also signed up with Visit Britain’s [Good to Go](#) industry standard for safe travel.
- [Rockjumper](#) – has introduced a COVID-19 tab on its top navigation.

## Brazil

[Brazil Birding Experts](#) specialises in birding tours all over the country. It features an interactive map on the homepage highlighting all the bird watching destinations it travels to. You can see that the map was created by a user and there is a link that you could explore, [Learn how to create your own](#). A gallery of inspirational images scrolls across the top of the homepage and the gallery features lots of additional images. Its tours are segmented by region and each tour can be expanded. Prominent links are provided to invite the user to customise their trip or browse testimonials. The website also features detailed biographies of the birding guides.

[Avesfoto Birding Tours](#) is based in São Paulo and specialises in birding and photography tours in several regions. All tours are organised and led by one guide who is an expert at finding elusive species. As there is just one guide, tours are customised and private, and testimonials describe the outstanding quality of the guiding. The operator is listed on the Blue Sky Wildlife directory.

## Colombia

[Manakin Nature Tours](#) offers birding and wildlife tours in more than 95 nature locations across 30 different routes in the Andes, Choco, Santa Marta Mountains, Amazon, Caribbean and Pacific regions. The operator also offers an innovative payment scheme for private tours whereby payment is taken on a ‘day by day’ basis. Trips are planned and conducted by the operator but the scheme reduces taxes and commissions payable, which can equate to as much as a 35% saving on an all-inclusive trip.

[Colombia Birdwatch](#) offers birding tours combined with immersion into Colombian culture and gastronomy for an authentic insight into the country. Based in Cali, tours are accompanied by one or more professional tour guides, departure dates are set and groups are a maximum of 8. It features a promotional video on its homepage and a link to other videos. Birding routes are clearly outlined through simple infographics and each route gives full details about the trips, the birds and the destinations visited. Colombia Birdwatch operates under sustainable principles, supporting local guides, operators and communities, and supports conservation

projects. It follows the ABA's [Code of Birding Ethics](#).

## Gambia

In Gambia, individual expert birding guides have established their own websites. [Gambian Bird Guide](#) is managed by an expert birding guide, Malick Suso, who has many years' experience in leading bird watching trips and he also manages other birding guides in the region. The website offers detailed information about Gambia and its birds along with useful tips like what to bring, where the best spots are and how to get there. Birding trips are customised according to need and a typical itinerary is included to give birders an idea of what to expect. A testimonial from Chris Packham, one of the United Kingdom's most respected naturalists, is featured on the homepage.

Birding guide Ousman Joku set up his own website, [Gambia Bird Guide](#), offering guided bird watching, butterfly and dragonfly tours in Gambia. The website has plenty of information for birders and offers sample itineraries. Although there is no information about COVID-19, there is a strong statement on its FAQs page that 'The Gambia is free of Ebola and always has been.' It is a good idea to be up front about issues like Ebola and COVID-19 with your potential market so they will be reassured.

## Papua New Guinea

Local inbound operator [Trans Niugini Tours](#) includes birding within its tour listings. Tours are based around the operator's lodges, set in spectacular surroundings, and local birding guides are available at all lodges to escort birders. Other itineraries include Birding in Paradise, a 10-day tour around the lodges. The website features a comprehensive listing of the 708 species found, including the 38 species birds of paradise that have been declared a protected species, and it is illegal to take their plumage out of the country.

## Peru

[Manu Birding Lodge](#) (MBL) was 'built for birders by birders' and is situated by the Manu National Park on the banks of the Madre de Dios River. The park has the highest biodiversity of any protected area in the world. The lodge sits by a private reserve of more than 500 hectares of pristine Amazon and is jointly owned by Amazon Birding and MBL, non-profit organisations involved in rainforest conservation.

The Lodge offers a range of tours, including to the famous clay licks, hummingbird garden, canopy tower and giant otters swimming in Oxbow lakes. It also promotes volunteer opportunities in the fields of research and monitoring of several species. On its website, the Lodge features a selection of videos and bird checklists. The Lodge also promotes its services on [Bed & Birding](#), a network of bird-friendly accommodation providers.

Based in Lima, [Kolibri Expeditions](#) offers birding tours aimed at all types of bird watchers, with tours segmented by Easy Bird Watching, Moderate Bird Watching and Extreme Birding. The homepage provides the customer with a clear set of reasons for choosing them as an operator, and it lists all upcoming tours for 2021 and 2022. Other tours are offered, such as Birding with Photography, Birding and Culture/Archaeology, and Hiking, Birds and Plants, Nature Trekking.

The About Us section of the website has a great deal of useful information including detailed Terms & Conditions that features a recommended list of things to bring. The operator has included recent information about the lifting of quarantine for arrivals from abroad on its Facebook feed.

## Sri Lanka

[Best of Lanka](#) offers birding tours within its portfolio of tourism trips that last from 1 day to 17 days. The operator has been awarded Tripadvisor Certificates of Excellence and has also partnered with [Travel Local](#), a global directory of local guides. Best of Lanka advertises its responsible criteria very clearly, providing 6 good reasons why travellers should select them. This is a good idea to reassure travellers of strong local credentials.

Figure 5: Why Travel with Best of Lanka

## WHY TRAVEL WITH BEST OF LANKA

- We are locals and travelers ourselves. Our trips are based on our experiences
- We have our own guides, chauffeurs and vehicles
- We provide exciting off-the-beaten track and authentic local experiences
- We have our own adventure centre in Kitulgala
- We operate our own tented safari camps in Yala and Udawalawe National Parks
- We have strong partnerships with some of the best hospitality brands in Sri Lanka
- We facilitate a variety of nature, eco and adventure based activities in Sri Lanka with our own experienced guides and facilitators

Source: Best of Lanka

[Walk with Jith](#) is a leading local wildlife and birding tour operator in Sri Lanka. The Managing Director Prasanjith Caldera is a highly experienced trekker and birder who personally prepares travel itineraries for his customers. The website features very detailed information about the best places to view birds, along with species information. Although birding is the main focus for the operator, photography, wildlife and nature are additional niches covered by the operator, which helps to diversify the offering for customers.

Several guides operate tours, and the organisation is recognised as a bird-friendly facilitator by the [Field Ornithology Group of Sri Lanka](#), the Sri Lankan affiliate of BirdLife International. Birding trip reports by customers are a feature on the website, arranged by country, and there are also a number of video trip reports, and all reports can be sorted. A substantial database of trip reports such as this gives the operator great credibility.

### Tips:

If you have your own website, make sure you include some information about COVID-19, the current situation in your country, and what measures you have in place to keep your travellers safe. Update and/or improve the information on a regular basis.

Conduct your own research of other local operators in your country and/or region to see what they are offering.

## Which products are you competing with?

Your main competing products are Wildlife Tourism and Adventure Tourism. Enthusiastic and Casual birders are also highly likely to be interested in wildlife that lives alongside bird life. Both niches are very competitive and if you can add value by incorporating elements of wildlife watching and/or adventure activities into your travel product, it is likely to attract additional customers.



**Tip:**

Study the CBI's interactive infographic, [Which market segments and niches](#), for useful information on how niches and segments cross over with one another and for ideas of other experiences you could add to your bird watching offer.

## 4. What are the prices for bird watching products on the European market?

While bird watching itself is an inexpensive, low impact activity, a holiday organised by a specialist tour operator can be an expensive trip for a European birder, especially to destinations that are less travelled to. Trips usually involve following a route, often to more remote or inaccessible places and rely on a range of locally provided services. Owing to the distance travelled and the specialist nature of the trip, they usually last for at least two weeks; many are longer, as is indicated in the table below.

Most European tour operators arrange birding trips to a particular country once or twice a year, moving on to other destinations at different times of the year. This is a particular reflection of the needs of hardcore and enthusiast birders who like to 'tick' birds off their lists, and also the nature of the market, which is highly specialised.

Bird watching is often affected by seasonality, as many birding trips are dependent on being able to view birds' migratory and/or breeding habits. Dry or wet weather can also affect the timing of birding trips and many operators recommend birding trips during the more favourable months.

Table 5: Birding Holidays Offered by European Tour Operators 2021/2022

Trip Details	Country	Scheduled Tour Dates	Duration	Price pp from (€)
<i>Holidays, 7 Days +</i>				
Budget Birding Tour	Sri Lanka	October 2021	11 days	1,924
Birding Tour	Gambia	November 2021	15 days	2,429
Serendib Scops Owl and Endemics	Sri Lanka	December 2021	11 days	2,610
Special Birds of Mitú and Inírida	Colombia	February 2022	16 days	4,500



Birding in the Upper Amazon	Peru	October/November 2021	14 days	4,740
Wonders of the Pantanal, Cerrado & Atlantic Forests	Brazil	July/August 2021	14 days	5,040
The Andes, the Choco & Santa Marta	Colombia	August 2021	16 days	5,230
Unchartered Amazonian Brazil Expedition	Brazil	September 2021	17 days	5,400
The Ultimate Feast of Endemics in the Land of the Marvellous Spatuletail	Peru	August 2021	20 days	6,550
Birding Tour	Papua New Guinea	April/May 2022	20 days	8,109

Source: Acorn Tourism Consulting

Note: Prices exclude international airfares.

For general bird watchers, and for trips that can be arranged year-round, local bird watching tour operators and local guides/experts are an important source for the European market, particularly for shorter trips. Enthusiastic birders, Casual birders and other tourists may source their trips in this way, booking experiences either before departing their home country, or once they arrive in the destination.

Table 6: Prices for Bird Watching Trips Organised by Local Tour Operators

Trip Details	Country	Duration	Price from pp (€)
Full day bird watching	Gambia	1 day	58
La Punta and Pozo Arenilla	Peru	3 hours	59
El Olivar Park and Pantanos de Villa	Peru	1 day	113
Extreme Birding - Chonta Condors and Apurimac Endemics at Sorayapampa	Peru	1 day	172

Overnight Birding Tour	Gambia	2 days	232
Inland and Upriver Bird Watching Tour	Gambia	5 days	406
Bird Watching in the Andes	Colombia	3 days	690
Machu Picchu and Abra Malaga Birding Programme	Peru	5 days	1,176
Birds of Sri Lanka	Sri Lanka	9 days	1,382
Manu Road Birding and Photography	Peru	5 days	1,402
Diademed Sandpiper-Plover and Lima Highlights Tour	Peru	4 days	1,558
Essential Papua New Guinea	Papua New Guinea	7 days	1,716
Araucana Lodge Choco Endemics Bonanza Tour	Colombia	8 days	2,843
Birding in Paradise	Papua New Guinea	10 days	4,605

Source: Acorn Tourism Consulting

### Tips:

To help set prices for your trips, consult the CBI study, [10 tips for doing business with European buyers](#), and scroll to tip 9, Set a fair price for your product.

This useful guide by Destination New South Wales provides additional advice about setting prices: [Pricing your tourism product](#).

Conduct your own research to find out typical prices for bird watching tourism products in your destination.

Make sure you provide an accurate description and breakdown of what is included and excluded in your pricing to provide clarity for any potential travellers.

This study was carried out on behalf of CBI by [Acorn Tourism Consulting Limited](#).

Please review our [market information disclaimer](#).