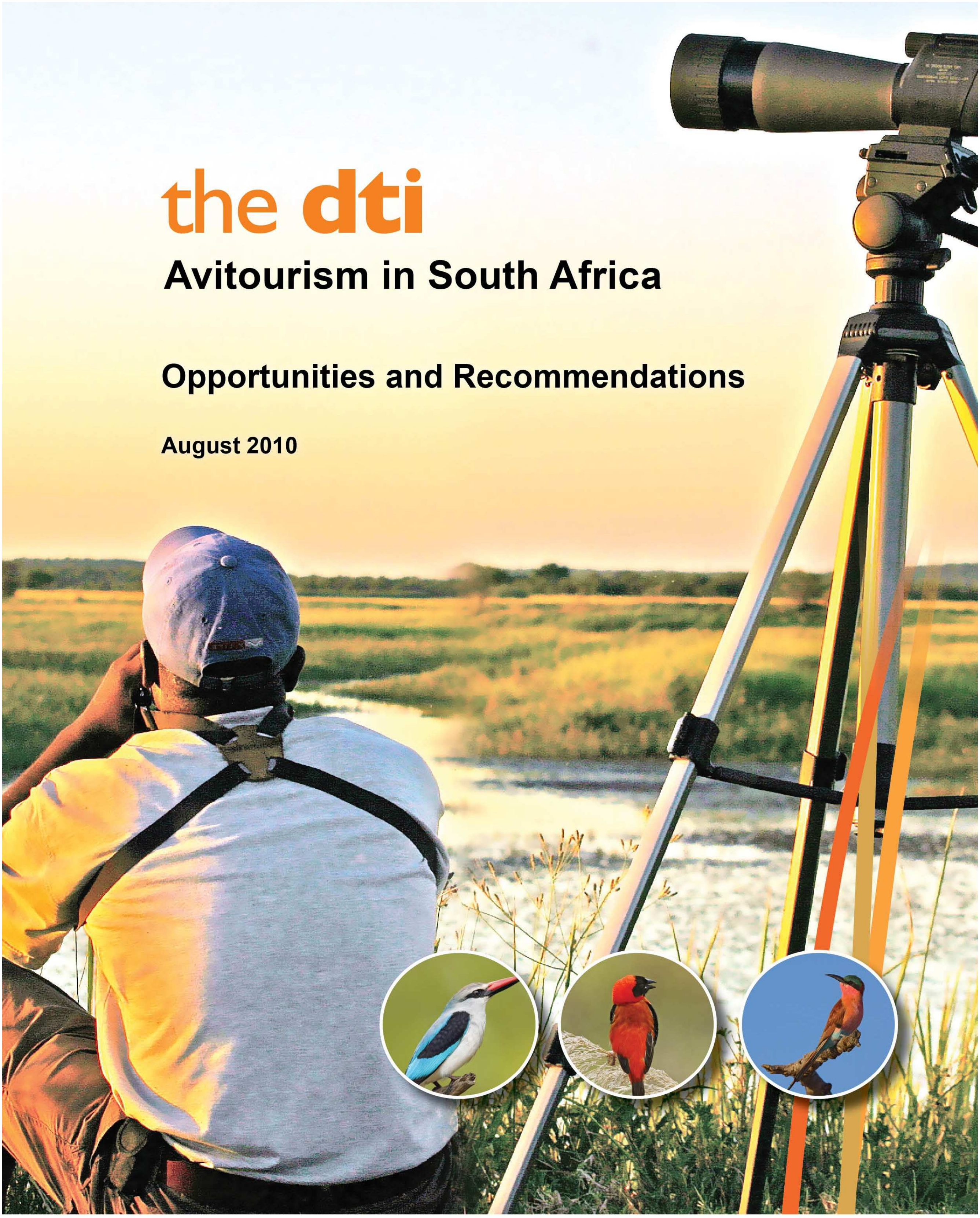
the dti
Avitourism in South Africa

Opportunities and Recommendations

August 2010



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Contents

Abbreviations and Acronyms

AsgiSA	Accelerated Shared Growth Initiative for South Africa
B-BBEE	Broad-Based Black Economic Empowerment
CAGR	Compound Annual Growth Rate
CBO	Community-Based Organisation
CSP	Customised Sector Programme
DEAT	Department of Environmental Affairs and Tourism (now the Departments of Environment and Tourism)
EBA	Endemic Bird Area
GDP	Gross Domestic Product
GIS	Geographic Information System
GVA	Gross Value Add
IBA	Important Bird Area
IMC	International Marketing Council
KZN	KwaZulu-Natal
LSM	Living Standards Measure
MCM	Marine and Coastal Management
MEC	Member of the Executive Council
PAX	Passengers
SAMSA	South African Maritime Safety Authority
SAPS	South African Police Service
SAT	South African Tourism
SETA	Sector Education and Training Authority
TFDS	Total Foreign Direct Spend
TGCSA	Tourism Grading Council of South Africa
TTCI	Travel and Tourism Competitiveness Index
TTCR	Travel and Tourism Competitiveness Report
UK	United Kingdom
UNWTO	United Nations World Tourism Organisation
USA	United States of America
VFR	Visiting Friends and Relatives

Glossary

Aggregation	Clustering of birds attracted to an environmental resource, e.g. water, specific foods.
Avitourism	Travel outside one's usual environment for the purpose of viewing birds in their natural habitats. People who travel to view birds in their natural habitats are avitourists.
Bird hides	These are man-made shelters that are used to observe birds at close quarters without disturbing the birds. A typical bird hide looks like a garden shed and has windows or openings to enable observation.
Bird route	A geographical area designated as having a relatively high concentration of birds of a particular species or variety of species with particular interest to avitourists and birders.
Birder-friendly accommodation	Accommodation establishments that cater to the needs of birders by offering flexible meal options (e.g. early or packed meals for birders who want to get an early start to the day), local bird lists and/or maps, etc.
Birding	Observing and identifying birds in their natural surroundings. People who engage in these activities are known as birders.
Boardwalks	Wooden paths for pedestrians and vehicles commonly found in wetlands, coastal dunes and other sensitive areas.
Congregation	Socially induced clustering of birds, e.g. mating.
Ecotourism	Environmentally responsible travel to natural areas in order to enjoy and appreciate nature in a manner that promotes conservation, has a low visitor impact, and provides for the beneficial active socio-economic involvement of local peoples.
Endemic Bird Areas (EBAs)	These are areas that are home to at least two bird species which are range restricted (i.e. travel within less than 50 000km^2 of 'home'). The birds are therefore confined to that area and cannot be found anywhere else (i.e. they are endemic to that area). The identification of EBAs is important for habitat-based conservation of bird life because EBAs contain the majority of the world's restricted-range bird species. As of 2009, BirdLife International has identified about 218 EBAs around the world.
Field guide	Books and other publications designed to help the reader identify birds while outdoors or out in the field. They typically include a description of the birds together with illustrations or photographs and an index.

Important Bird Areas (IBAs)	These are areas identified by BirdLife International and its regional offices as priority conservation sites for bird life. IBAs are required to meet the following criteria before they can be designated as such: ▸ Hold significant numbers of one or more globally threatened species; ▸ Be one of a set of sites that together hold a suite of restricted-range species or biome-restricted species; and ▸ Have exceptionally large numbers of migratory or congregatory species. As of 2009, there were almost 11 000 designated IBAs in about 200 countries.
Life list	A list of all bird species seen by a particular observer (often qualified, e.g. life list, county list, year list, etc.). Some birders may keep several lists, and some also compete to amass longer lists than their rivals.
Migrant	A bird that moves seasonally from one location to another
Nature-based tourism	Tourism that takes place mainly in natural environments, with the specific purpose of viewing and experiencing the natural features of a destination.
Pelagic birds	Birds that live in or on the open ocean or sea
Protected areas	The International Union for the Conservation of Nature and the United Nations Environmental Programme both define a protected area as *"An area of land and/or sea especially dedicated to the protection and maintenance of biological diversity, and of natural and associated cultural resources, and managed through legal or other effective means."* Examples of protected areas include nature reserves, national parks, habitat/species management areas, and protected landscapes/seascapes.
Ramsar sites	The Convention on Wetlands of International Importance was signed in Ramsar, Iran in 1971. It is an intergovernmental treaty for the conservation and use of wetlands and their resources. Ramsar sites are therefore wetlands that have been designated for inclusion in the Ramsar List of Wetlands of International Importance. As of 2009, there are 158 signatories to the Convention which covers 1874 wetland sites around the world.
Trip expectation	The average number of birds that one can expect to see in an area within a specified time frame
Vagrant	An individual bird that is observed in a region that lies outside of the range that is currently known for that species.

1. Introduction and Purpose

This document is part of the final output of the analysis of South Africa's avitourism market conducted from May 2009 to January 2010. Its purpose is to draw on research conducted during the project to provide:

- A targeted overview of the current and potential avitourism market in South Africa;
- An analysis of the strengths, weaknesses, opportunities and threats relating to the avitourism sector; and
- Recommendations for supporting the avitourism sector, with associated implementation plans (description of key activities, institutional roles and time frames).

Full research findings are contained in the *Research and Analysis* document which accompanies this report.

Background to the study

During 2009, as part of wider efforts to complement the marketing strategy of South African Tourism (SAT), the Department of Trade and Industry's (**the dti**'s) Tourism Unit, identified avitourism as a potential high-growth niche to be further investigated.

Birding is one of the fastest-growing nature-based tourism activities worldwide and is experiencing similar growth in interest and popularity in South Africa. However, insufficient data and a lack of industry-wide planning for future development has made it difficult to develop a targeted strategy to grow this sector. Therefore **the dti** concluded that an assessment of the status of the avitourism segment in South Africa was both necessary and timely.

There were seven overall objectives for this study:
1. Propose a practical and inclusive definition for avitourism.
2. Develop a market profile on the avitourism segment in South Africa.
3. Provide information on the specific needs of the avitourism market.
4. Identify product gaps.
5. Identify core issues that confront both the operation and the development of tourism businesses targeting the avitourism market.
6. Evaluate the economic impact of avitourism.
7. Recommend interventions necessary to support the avitourism segment.

A summary of research findings and recommendations addressing each of these seven aims is contained in this document.

The potential for avitourism in South Africa and key recommendations for development

This project's assessment is that **avitourism is an attractive niche market with growth potential** that can be supported with relatively affordable measures. This niche segment possesses the potential to further the National Tourism Growth Strategy objectives as well as **the dti**'s Customised Sector Plan.

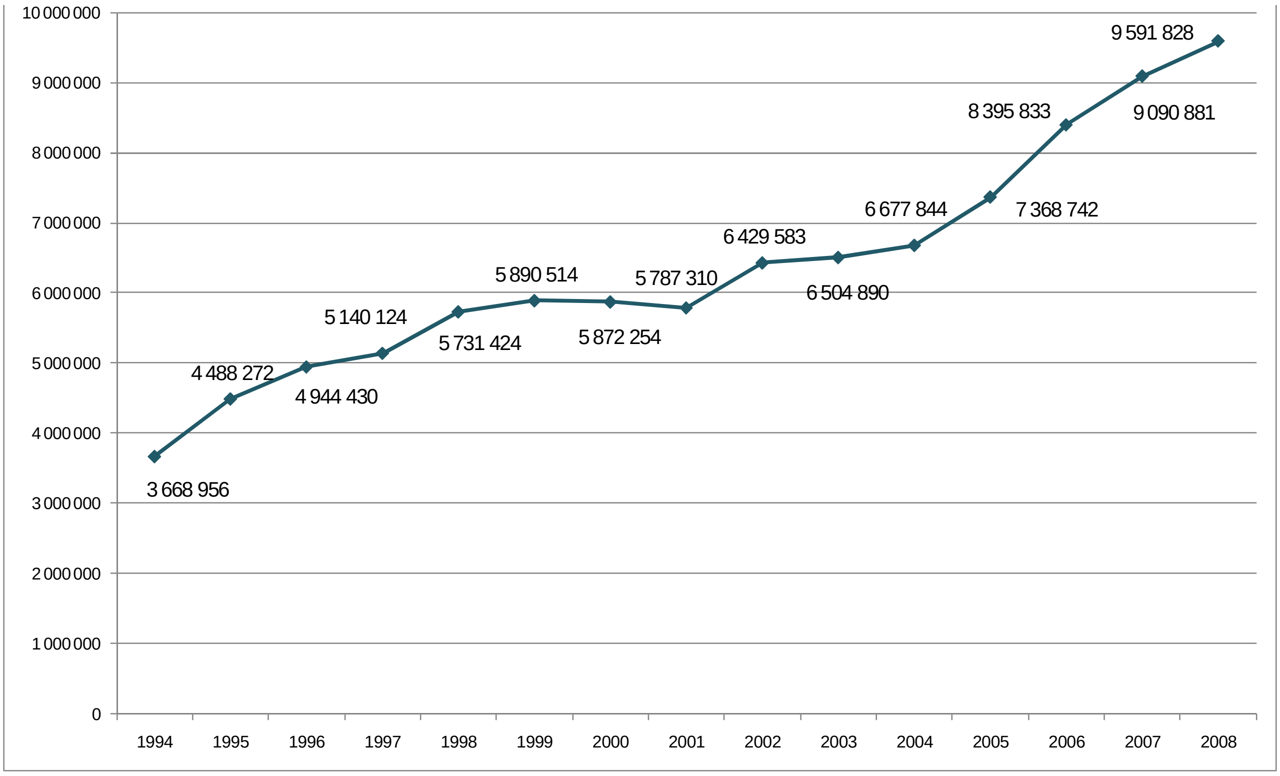
2. The Significance of Tourism to the South African Economy[1]

Tourism is a fast-growing industry which is recognised by the South African government as playing a key role in economic growth and poverty reduction. It has been demonstrated that tourism can influence economies' generation of value add, employment, personal income and government income. Tourism is also one of the three sectors (the other two are business tourism and business process outsourcing) which were identified as a special priority in the Accelerated and Shared Growth Initiative for South Africa (AsgiSA).

South Africa's political transformation in the early 1990s paved the way for the country's return to international tourism. Since then, the country has seen significant growth in foreign arrivals. For the period 1994 to 2000, the compound annual growth rate (CAGR) was 8%. Tourism to South Africa has been growing steadily since 2001, when South Africa implemented its Tourism Growth Strategy. Between 2001 and 2006, the CAGR of the total foreign arrivals to South Africa was 7%, a reflection of the tourism sector becoming more focused on those countries in which best to market South Africa. There were about 60 million international visits to South Africa over this period. However, growth in 2008 was slower than in the previous three years due to the global economic crisis that affected mainly overseas arrivals to South Africa.

In 2008 there were 9 591 828 foreign arrivals to South Africa, which represented an additional 500 947 arrivals over 2007. The 5,5% growth rate was above the global average growth of 1,8%. International visitors spent an extra R6 billion in 2008 compared to 2007. Total foreign direct spend (TFDS) reached a record high of R74,2 billion in 2008, an increase of 7,8%. The average TFDS (excluding capital expenditure) of all tourists increased by 15,7% (R1 100) in 2008 to reach R8 100.

Figure 1: Total foreign arrivals in South Africa 1994 to 2008[2]



[1] Note: This section is primarily based on information sourced from UNWTO. 2008. Tourism Satellite Account Recommended Methodological Framework.
[2] Source: UNWTO (2008) Tourism Satellite Account Recommended Methodological Framework

Leisure remains the primary purpose of tourist visits to South Africa, but this has declined from 61,3% in 2007 to 57,7% in 2008. This was driven by the decrease in holiday tourists down from 25,3% in 2007 to 20,0% in 2008. Visiting friends and relatives (VFR) travel increased from 24,2% in 2007 to 25,1% in 2008. Tourists visiting for personal shopping, persons shopping for business purposes and business travellers have increased. The analysis of purpose of visit by region shows that most holiday tourists come from overseas markets (Europe, the Americas, and Asia and Australasia), whilst shopping and VFR tourists come from Africa.

African countries constitute the largest foreign-source market in terms of tourist arrivals, thereby making a 75% contribution to total arrival figures. The majority of African arrivals come from neighbouring Southern African Development Community (SADC) countries. The European market constituted 15% of total foreign arrivals in South Africa and formed the second largest foreign market during 2008. The five largest European markets during 2008 were the United Kingdom (UK), the United States of America (USA), Germany, the Netherlands and France. Other large markets across the globe included Australia, Canada, Italy and India.

Globally, domestic tourism remains significantly more important than international tourism in both activity and monetary terms. Significant growth in domestic tourism is forecast for the developing countries of Asia, Latin America, Africa and the Middle East, where the proportion of active participants in tourism will increase significantly. Access, disposable income and proximity are key elements in determining the future performance of these destinations and the level of growth that can be attained. South Africa is well positioned to capitalise on future opportunities relating to the domestic tourism market.

Domestic tourism contributes significantly to the tourism sector in South Africa – accounting for 77% of total tourism volume in South Africa in 2008 – and possesses the potential for even greater expansion (it contributed only 26% of total tourism receipts in 2008). Of the adult population, 47% (about 14 million people) took an average of only 2,4 domestic tourism trips in 2008. This resulted in 33 million domestic trips. There has been an increase in the number of people travelling since 2006, showing that domestic travel in South Africa is becoming more attractive to South African adults. VFR accounted for 71,4% (23 million) of all domestic trips, while holidays accounted for only 15,7% (5 million) of all domestic tourism trips.

The revenue generated through domestic tourists' total direct domestic spend (TDDS) in South Africa was approximately R26 billion in 2008. On average, a domestic tourist spent R550 per trip in 2007, compared to R780 per trip in 2008 (in nominal terms). Spend per trip increased across all purposes of travel. As could be expected, holiday trips accounted for the highest spend per trip at R1 910 per trip, while VFR tourists spent only R480 per trip. On average, holiday tourists spent R370 a day, while VFR tourists spent a mere R110 a day.

The first draft of the Tourism Satellite Account (TSA) for South Africa, which measures the contribution of tourism to the South African economy, estimates that in 2005 **tourism direct gross value added**[3] for South Africa amounted to R42,3 million (or 3,1% of total gross value added). **Tourism direct gross domestic product was R45,6 million (or 3,0%) of total gross domestic product for 2005.** There were 527 630 persons (or 4,3% of total employment) directly engaged in producing goods and services purchased by tourists in 2005.

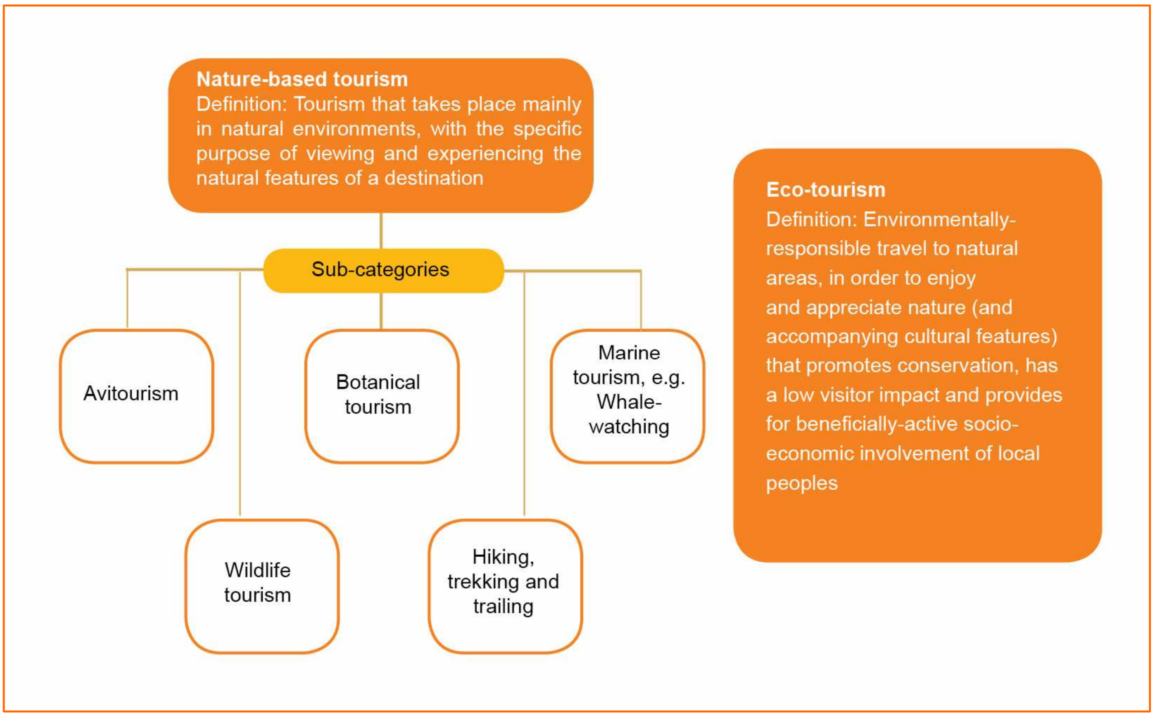
[3] Tourism direct gross value added is the sum of the portions of added value generated by tourism and other industries as they respond to tourism consumption (Table 6 of the TSA).

3. Avitourism Opportunities

3.1 Definition of avitourism

Avitourism is travel outside a person's usual environment for the purpose of viewing birds in their natural habitats.[4] Since it is centred on components of the natural environment (i.e. birds and their habitats), avitourism is considered to be a **subcategory of nature-based tourism**. However, if avitourism adheres to sustainability principles it can also be regarded as a component of ecotourism (sustainability is at the core of ecotourism but is not a key feature of nature-based tourism). Figure 2 below distinguishes between nature-based tourism and ecotourism.

Figure 2: Nature-based tourism categories[5]



In keeping with the conventions of the United Nations World Tourism Organisation (UNWTO) for the classification of tourists, two categories of avitourists may be defined:

- **International avitourists** are residents of foreign countries who participate in bird-watching activities while visiting South Africa. They may not have travelled to South Africa exclusively to observe birds in their natural habitats, but do so while they are in the country.
- **Domestic avitourists** are residents of South Africa who travel within the country to participate in birding activities. Their trips may be day or overnight trips.[6] Day trips, which are accepted as an aspect of overall domestic visitor strategies in many countries, are included in this project's definition of

[4] For the purposes of this report, 'one's usual environment' is defined as an area within a 40km radius from home. The choice of 40km is intended to be consistent with '**Tourism definitions used in South Africa',** Department of Environmental Affairs and Tourism (DEAT), Tourism South Africa (2008).
Note: This definition of avitourism, for the purposes of this report, excludes hunting. Although bird hunting is an important source of tourism revenue for certain portions of South Africa, prevailing international conventions for bird-watching require the birds to be alive for viewing, particularly for those who keep lists of birds sighted.
[5] Source: H. Keyser (2009) *The Nature Conservancy*, 2009 (www.nature.org)
[6] Consistent with *Tourism definitions used in South Africa*, DEAT, Tourism South Africa (2008), for the purposes of this report, 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).

avitourism, and they represent a potentially significant opportunity for increasing domestic visitation to sites throughout South Africa.

Although international avitourists represent an important group for the future of avitourism in South Africa, **domestic avitourists present the major untapped market uncovered in this project**. Survey research conducted for this project has shown that birding and domestic avitourism have grown in South Africa over the past 10 years.

3.2 Profile of avitourists and potential target-market segments

3.2.1 Profile of avitourists

Previous studies of avitourists made a distinction between those who are committed, or 'active', and those who are 'passive'.[7] Active avitourists take frequent birding trips, attend courses and invest in equipment, whereas passive avitourists are defined as people that are able to identify common birds in their neighbourhood or take a passing interest in birds when travelling.

A survey conducted as part of this project made use of the following categorisations of avitourists: casual (32%), enthusiastic (58%) and fanatical (10%).[8] Behaviour and spending patterns across these avitourism sub-segments vary considerably (see *Research and Analysis* report for a full discussion of survey findings).

Overall, active South African avitourists spend approximately 38 days a year birding, two-thirds of which include overnight trips. Fanatical birders devote 50% more time than this to their hobby. 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, of which 77% were within Southern Africa.

Approximately 60% of birding activity takes place outside 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 spend 90% of their overall day trips on birding and approximately 80% of total birding days on overnight trips. 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 caravanning. 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. Nevertheless, this group spent more overall on an annual basis, because they spent more time in the field.

Approximately 97% of domestic avitourists surveyed organised their own tours, compared to 63% of international avitourists. International avitourists expressed a high degree of preference for specialist birding tour operators, and are less inclined to use travel agencies and general tour operators to organise their trips. In contrast, only 2% of domestic avitourists surveyed used specialised birding tour operators. Bird clubs and birding pal groups also seem to play an important, though occasional, role for domestic avitourists.

Of domestic avitourists, 26% have been on 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 go bird-watching independently and the high cost of bird tours were the most commonly cited constraints. About 18% of domestic avitourists surveyed went on pelagic birding trips in South Africa or elsewhere between 2007 and 2009. Statistics for international avitourists' 'consumption' of pelagic birding trips are not available.

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[7] Eubanks, Jr., T.L., Stoll, J.R., Ditton, R.B. (2004). 'Understanding the diversity of eight birder sub-populations: Socio-demographic characteristics, motivations, expenditures and net benefits'. *Journal of Ecotourism*, 3(3), 151-172; Tourism Queensland Research Department. (2004). *Bird Watching Tourism*.

[8] The classification of birders into these categories is artificial, because of the continuum of levels of commitment to the hobby (Turpie & Ryan 1998). Nevertheless, some kind of classification is useful in order to understand the changes in experience and behaviour along this continuum with increasing avidity.

Preliminary consumer descriptions of international and domestic avitourists are presented in Appendix B.

3.2.2 Potential target market segments

South African Tourism's (SAT's) *Tourism Growth Strategy 2008 – 2010* sets out a range of priority market segments for domestic and international markets. The tables below match the characteristics of avitourists surveyed during this project to the various market segments identified by SAT for both domestic and international tourists. Note that there may be some bias in the survey due to the online survey method and a tendency for a larger number of avid avitourists to respond than casual avitourists.

Table 1: Potential matches between domestic avitourists and wider domestic target markets[9]

<table>
<tr><th colspan="2">Domestic Avitourism Target Segments</th></tr>
<tr><th>Birder Profiles</th><th>Corresponding Tourism Market Segments</th></tr>
<tr><td>South African domestic birders, 1997

<u>Demographics</u>
▸ Home province: Gauteng, 39%; KwaZulu-Natal (KZN), 24%; and Western Cape, 20%
▸ Gender: two-thirds male
▸ Age: average 50 years, 49% between 40 and 60, 22% retired (65+)
▸ Education: average 15 years, i.e. higher-education level
▸ Employment: 70% professional
▸ Household income: average R13 500; about 20% > R20 000

<u>Travel behaviour</u>
▸ Group size: majority couples
▸ Accommodation preferences (commercial): camping; self-catering chalets and bed-and-breakfast establishments (B&Bs)
▸ Trip length: 15 – 42 days

South African domestic avitourists, 2009

▸ Home province: Gauteng, 39,9%; Western Cape, 33,1%; and KZN, 12%
▸ Gender: 75% male
▸ Age: average 49 years; 13,2% < 30; 34,7% between 30 and 50; 41,3% between 51 and 65; 10,8% retired (65+)
▸ Household size: 74% no children in household
▸ Education: 58% higher-education level; 12% matric only
▸ Household income: 72% > R20 000; 36% > R40 000; 28% < R20 000
▸ LSM (Living Standards Measure) 9 – 10

<u>Travel behaviour</u>
▸ 27 days per annum on overnight leisure trips; 23 days spent birding
▸ Birding destinations: Western Cape, Mpumalanga, KZN, Limpopo
▸ Mainly inter-provincial on overnight stays
▸ Group size: equal split between couples and small groups (~40% each)</td><td>Primary segments

<u>Golden active couples</u>
▸ Home province: Gauteng 46%, KZN 11%
▸ Gender: 45% male, 55% female
▸ Age: majority 50+, 83% have children older than 21 years
▸ Education: 40% matric, 28,1% higher-education level
▸ Household income: Primarily R5 000 to R20 000
▸ LSM 9 – 10

<u>Travel behaviour</u>
▸ Average trip length: 13 nights
▸ Trips per year: 3 per person
▸ Average days travelling per year: 39
▸ Destinations: KZN, 27%; Western Cape, 23%; Mpumalanga, 8%
▸ Group size: majority couples
▸ Accommodation preferences: self-catering, camping and guesthouses
▸ Seasonality: December 16%, April 14%

Secondary segments

<u>Well-off homely couples</u>
▸ Home province: KZN, 31%; Western Cape, 29%; and Eastern Cape, 17%
▸ Gender: 57% male, 43% female
▸ Age: majority 30 – 50, majority have no children
▸ Education: 33,7% higher-education level; 39,1% matric only
▸ Household income: primarily between R10 000 and R20 000
▸ LSM 8 – 10

<u>Travel behaviour</u>
▸ Trip length: 7,5 nights
▸ Trips per year: 4,1 per person
▸ Average days' travelling per year: 31
▸ Destinations: KZN, 31%; Western Cape, 29%; and Eastern Cape, 17%
▸ Group size: majority couples
▸ Accommodation preferences: self-catering,</td></tr>
</table>

[9] SAARF (South African Advertising Research Foundation) AMPS (All Media and Products Survey) 2008a, SAT 2004, SAT 2009.

Domestic Avitourism Target Segments	
Birder Profiles	**Corresponding Tourism Market Segments**
▸ Accommodation preferences (commercial): self-catering, camping and caravanning ▸ Information sources: birding books, birding/nature magazines, Internet ▸ Travel arrangements: self-organised (95%); specialist operators (4%)	camping and hotels ▸ Seasonality: December 20%, April 14% **Independent young couples and families** ▸ Home province: Gauteng 59%, Western Cape 9%, KZN 8% ▸ Age: majority 30 – 50, majority have children of primary and high school age ▸ Gender: 45% male, 55% female ▸ Education: 43% higher-education level; 36% matric ▸ Household income: primarily between R10 000 and R25 000 Travel behaviour ▸ Trip length: 10 nights ▸ Trips per year: 2,2 per person ▸ Average days' travelling per year: 22 ▸ Destinations: KZN, 37%; Gauteng/Western Cape/Eastern Cape, 10% each ▸ Group size: majority couples ▸ Accommodation preferences (commercial): self-catering, hotels and camping ▸ Seasonality: 33%, December; 11%, April

There appears to be a close correlation between **domestic avitourists**, **'golden actives'** and '**independent young couples and families'**. However, there are some differences in the profile of domestic birders, including:

- Higher average-income levels;
- Longer average-trip lengths;
- Stronger presence of people based in the Western Cape;
- Greater tendency to visit multiple provinces; and
- Higher levels of educational attainment.

Table 2: Potential matches between international avitourists and wider international target markets[10]

International Birding Tourism Target Segments	
Birder Profiles	**Corresponding Tourism Market Segments**
United States (US) birders ▸ Origin: California, Pennsylvania, New York State ▸ Gender: 54% female ▸ Age: average 49 years, 58% between 45 and 65, 19% > 65 ▸ Education: 65% higher education ▸ Household income: 49% > US$50 000; 28% > $75 000 ▸ Marital status: 72% married	**United States** **Primary segment** **Next Stop South Africa (NSSA)** <u>Demographics</u> ▸ Gender: 50:50 ▸ Age: 57% between 41 and 65, 43% 65+ ▸ Education: 78% higher education ▸ Household income: 54% > US$60 000 – $120 000 ▸ Marital status: 71% married/living with partner <u>Travel behaviour</u> ▸ Average trip length: 2 – 3 weeks ▸ Trips per year: 3 ▸ Past travel: Western Europe > 80%; Caribbean, North Africa and Asia < 80% ▸ Future travel: Western Europe, 48%; Caribbean, 37%; Australia/New Zealand, 33%; Asia, 26%; South America, 24% ▸ Information sources: travel agency, 29%; Internet travel agency, 17%; travel guides, 13%; other Internet, 11% ▸ Travel companions: 73% significant other ▸ Destination expectations: variety of activities, ease of getting around, safety and availability of good restaurants; travelling for education and culture ▸ Accommodation preferences: quality more important than price; prefer hotels **<u>Possible secondary segments</u>** ▸ Wanderlusters
International birding visitors to South Africa, 1997 ▸ Origin: USA, UK, rest of Europe ▸ Demographic information: none available ▸ Trip length: 21 days ▸ 1/3 Free Independent Travellers (FIT), 2/3 guided tours **International birders, 2009 survey** <u>Demographics</u> ▸ Origin: Europe (60%), Africa (24%), USA (8%) ▸ Gender: 82% male ▸ Age: average 53 years, 87% between 41 and 65, 4% >65+ ▸ Education: 61% higher education ▸ Household income: unknown ▸ Marital status: unknown	**Likely primary segments*** ***Germany, France, Netherlands, Australia*** NSSA Senior Explorers ***United Kingdom*** NSSA **Possible secondary segments** ▸ Wanderlusters (UK, Germany, France, Australia) ▸ Experienced Wanderlusters (UK)

[10] Sources: South African Advertising Research Foundation (SAARF) All Media and Products Survey (AMPS) 2008a, SAT 2004, SAT 2009.

International Birding Tourism Target Segments	
Birder Profiles	**Corresponding Tourism Market Segments**
Travel behaviour ▸ Average days travelling per year: 20 days on overnight trips ▸ Information sources: Internet; birding books, birding and nature magazines and other birders ▸ Travel arrangements: 2/3 self-organised; 1/3 specialist birding tour operators ▸ Travel companions: more than half (52%) in pairs, 16% in groups of up to 8 ▸ Destination expectations: species diversity and rare/endemic species most important factors, followed by overall number of birds; other attractions/things to do relatively important ▸ Accommodation preferences: self-catering most popular, followed by hotels and game lodges	

Please refer to Annexure A for more detailed profiles of international target market segments.

3.3 Economic impact of avitourism in South Africa

Research conducted for this report suggests that, conservatively speaking, **the total size of South Africa's current avitourism market is between 21 000 and 40 000 avitourists annually.**[11] Of this total, the number of active and potential **domestic** avitourists ranges between 13 000 and 24 000 consumers, who spend between R482m and R890m annually. The number of **international** avitourists ranges between 8 000 and 16 000, and they spend between R309m and R618m annually. Collectively, these **avitourists spend an estimated R927m to R1,725bn** on birding trips, support services and equipment annually.[12] Using a conservative multiplier effect of 1,3, **avitourism's potential contribution to GDP (Gross Domestic Product) is in the range of R1,205bn to R2,243bn annually**.

Avitourism shares much of its industry infrastructure with other segments of the overall tourism market. For example, avitourists use many of the same accommodations used by other tourists, and visit the same national parks and protected areas. No centralised source of information on avitourist-specific companies currently exists. For these reasons, it is not possible to isolate the employment uniquely attributable to avitourism. Furthermore, in the case of avitourism community guides and small operators, the economic benefit is more likely to be livelihood support and enterprise development than employment.

Based on a consumer survey conducted as part of this project, an overview of the average spend of avitourists in South Africa, by level of avidity, is presented in the table below.

Table 3: Average annual spending (R) of avitourists per person in South Africa – 2009 survey

	Domestic Avitourists			International
	Casual	Enthusiastic	Fanatical	
Birding equipment and paraphernalia	3 651	8 520	13 240	7 054
Clubs and courses	184	473	481	591
Self-guided birding trips	11 981	38 993	23 698	17 402
Organised bird tours	1 283	7 487	11 884	13 604
TOTAL AVERAGE ANNUAL EXPENDITURE PER PERSON (R)	**17 099**	**55 473**	**49 303**	**38 652**

[11] This range extrapolates from survey data based on known relationships between the number of respondents who indicated membership of 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, the penguins at Boulders, for example, while they are on holiday in South Africa. Were these tourists included, the estimated avitourism market would be considerably larger.

[12] This figure excludes multiplier effects and is a minimum estimate, based on the average spend per consumer, as revealed in the 2009 survey and estimates of the total market size.

As the average spend figures illustrate, those birders who identified themselves as 'enthusiastic' spent an average of R55 473 per year on birding and avitourism activities.

Compared to the figures from the 1998 survey, expenditure by domestic avitourists has increased across the board. The total average annual spend by enthusiastic avitourists in particular has more than tripled in the past 11 years.

Table 4: Average annual spending (R) of avitourists per person in South Africa – 1998 survey[13]

	Domestic avitourists			International
	Casual	Enthusiastic	Fanatical	
Birding equipment and paraphernalia	2 258	3 946	10 660	N/A
Clubs and courses	1 349	4 186	8 010	N/A
Self-guided birding trips	3 287	4 542	8 686	N/A
Organised bird tours	57	851	1 399	N/A
TOTAL AVERAGE ANNUAL EXPENDITURE PER PERSON (R)	**6 951**	**13 525**	**28 755**	**N/A**

Enthusiastic avitourists therefore form a core market segment for South Africa's avitourism activities. **Avitourists spend more per consumer than other niche market segments**.

The table below compares the three niche markets in relation to five of the National Tourism Growth Strategy objectives, i.e. volume, length of stay, yield, seasonality and geographic spread.

Table 5: Comparison of avitourism with other niche markets

	General Tourism [14]		Avitourism[15]		Backpacking Tourism[16]	Business Tourism[17]	
Indicator	**Domestic**	**International**	**Domestic**	**International**	**International**	**Domestic**	**International**
Estimated market size	13,9 million	9,6 million	13 000 – 24 000	8 000 – 16 000	~ 110 000	2,1 million	400 000
Length of stay per trip	4,5 nights	8,2 nights	43 days on leisure trips per year	41 days on leisure trips per year	average 42 days, ~72% stay less than 31 days	average 3 days	average 5 days
Trip spend	R780	R8 100	R24 891 per annum	R17 400 per annum	R10 294 per trip	R6 400 – 10 300	R13 700 – 24 000
Spend per day	N/A	R980	R623	Not available	R388	R2 133 – 3 433	R2 470 – 8 000
Seasonality	Mainly summer and Easter holidays	Mainly November to March	Not available	Mainly spring (September to November)	Mainly summer months	March and September to November	
Geographic spread	KZN, Eastern Cape, Gauteng, Western Cape	Gauteng, Western Cape, KZN	Western Cape, Mpumalanga and Limpopo	Gauteng, Mpumalanga, Limpopo	Western Cape, Mpumalanga, KZN	Gauteng, Western Cape and KZN	

13 Source: Turpie & Ryan, *The Nature and Value of Birding in South Africa*, 1998.
14 SAT, Domestic Tourism 2008 Performance, 2009; SAT, 2008 Annual Tourism Report, 2009.
15 Survey of domestic and international birders, 2009.
16 Domestic figures are not available as international backpackers make up most of the market. Data source: Fund for Research into Industrial Development Growth and Equity (FRIDGE) Backpacker tourism sector study, 2007.
17 FRIDGE Business tourism sector study, 2006.

Note: Due to different survey methodologies and time frames for the studies on the three tourism niches, direct comparisons are not always possible. Analysis and findings based on Table 6 should therefore be regarded as indicative but not conclusive.

- The avitourism market (i.e. visitors who define their reasons for visiting a destination as including birding) is significantly smaller than the backpacking and business tourism niche markets profiled in Table 6. Avitourism constitutes an even smaller proportion of the total general tourism market. However, 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.
- Given the demographic characteristics of the backpacking market, **length of stay** outperforms any other market. The average length of stay per trip of both domestic and international avitourists is not known, but is likely to be longer than the length of stay of business tourists.
  - Domestic avitourists spend on average a total of 43 days on leisure trips each year (16 days on day trips and 27 days on longer trips). International birders spend on average a total of 41 days on leisure trips each year (16 days on day trips and 25 days on longer trips). Thirty-four days of leisure travel are spent outside of their province of residence, of which approximately a quarter is spent outside of Africa. Birding activities take up a significant part of all leisure trips of both international and domestic avitourists. However, international tourists spend a somewhat lower percentage of days birding during leisure trips away from their province of residence. This represents an opportunity to market other destination experiences aligned with their interests, thereby possibly influencing length of stay and yield.
- The **trip spend** of backpackers is similar to that of domestic business tourists, but substantially lower than that of international business tourists. The average spend per trip of general domestic tourists was R690 in 2008, significantly lower than backpacking and business tourism. The average spend per trip of avitourists is not known.
- Domestic avitourists spend more per day than backpackers do (figures for international avitourists are not available), but less than business tourists. This is to be expected, as business tourists tend to stay in hotels, whereas both birders and backpackers favour more affordable accommodation types such as self-catering establishments. Backpackers are more price-sensitive than birders, given their overall long periods of stay, and are prone to stay in dedicated backpacker accommodation. Unlike most markets, accommodation makes up a small part of backpacker spend, with activity spend being one of the leading items of backpacker spend. This is in contrast with the spending patterns of birders, with the bulk of spend going towards accommodation and transport.
- Avitourists, backpackers, business tourists and general tourists have similar **seasonality** patterns, with most visits taking place during spring and summer.
- The **geographic spread** of niche-market activities reflects the concentration typical of domestic and international tourism in South Africa. The activities of birders, backpackers and business tourists tend to be concentrated in Gauteng, the Western Cape, Mpumalanga, and KwaZulu-Natal. Both domestic and international avitourists also show relatively high levels of visitation to Limpopo.

3.4 Environmental and conservation impacts of avitourism

Avitourism also provides environmental benefits to communities, helping to educate locals about the value of biodiversity and incentivising the successful protection and preservation of natural areas. "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."[18]

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.[19] There is also a documented high level of overlap between membership in conservation and birding organisations.[20] 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-

[18] Sekercioglue, C. (2002). Impacts of birdwatching on human and avian communities, *Environmental Conservation*, 29(3): 282.
[19] Cordell, H.K. & Herbert, N.G. (2002). The popularity of birding is still growing. *Birding* 34: 54–59.
[20] Dickinson, R. & Edmondson, B. (1996). Golden wings. *American Demographics* 18: 47–49.

watchers will seek them out in non-protected areas, thus creating an incentive for locals to preserve these areas.

When compared to other outdoor activities that fall within nature-based tourism, avitourism has a lower environmental impact.[21] The expectations of avitourists (that they will see a variety of species) also provide a direct link between avian biodiversity and local income.

3.5 South Africa's competitiveness as an avitourism destination

Selected quotes from survey respondents on why they would consider visiting South Africa:

- *Well established birding routes which are very well appointed with good road networks.*
- *The amazing variety of terrain as well as variety of birds in each habitat.*
- *Variety of species and well developed birding network of trails and accommodation, resulting in ease of access.*
- *Ability to combine birding with other family-oriented activities.*
- *11% of the world's population of birds is in the Kruger Park alone, even before you take in the rest.*
- *The country is vibrant and full of wonderful colour and texture. The bird life is so different from New Zealand – bird life in New Zealand is 'in your face', whereas we found that birds we saw are a little more timid. The animal life is awesome too.*
- *Huge variety of birds and birding areas and different bird clubs around [that are] always happy to accommodate visiting birders.*
- *The avian diversity, good infrastructure, affordable accommodation, community birding projects, friendly people.*
- *Excellent field guides [books], infrastructure, and diversity of birds. The availability of excellent bird guides [people] is also very important.*

The attractiveness and potential for expansion of avitourism in South Africa is founded on the base assets available. These assets include the **natural characteristics** of the country (e.g. species diversity, richness, and endemism) as well as the **advanced tourism infrastructure** (physical and informational), both general (e.g. complementary wildlife attractions, accommodation and transportation amenities) and birding-specific (e.g. Important Bird Areas (IBAs), infrastructure such as boardwalks, hides, and interpretation centres, and birding routes) in place to support avitourists.

A set of birding destinations, regarded as potential competitors for South Africa, was selected for analysis. The set comprised SAT's competitive set, other destinations viewed as prominent global birding destinations and neighbouring destinations that could offer complementary or competitive birding experiences. South Africa's ranking relative to competitors is presented in Table 7 below.

[21] Weaver, D.B. (1998). *Ecotourism in the Less Developed World*. Wallington, UK: Oxon International and Page, S.J. & Dowling, R.K. (2002). *Ecotourism*. Essex, UK: Pearson Education Limited.

Table 6: Ranking of South Africa's avitourism market relative to selected competitors[22]

Avitourism Indicators	South Africa	Kenya	Uganda	Brazil	Thailand	Australia	Namibia	Botswana	Tanzania
Total known species	7	3	4	1	5	6	8	9	2
Total species of birds	7	2	4	1	5	6	8	9	3
Total endemic species of birds	4	6	9	2	5	1	7	8	3
Trip expectation (no. of species in a three-week trip)	4	1	2	2	4	6	5	6	3
No. of endemic bird areas	5	4	5	1	6	2	7	3	8
No. of Important Bird Areas (IBAs)	3	5	6	2	5	1	7	8	4
No. of globally-threatened or near-threatened bird species	5	6	8	1	4	2	7	9	3
No. of Ramsar sites	2	6	3	5	4	1	7	8	7
No. of clearly-defined birding routes	1	9	9	9	9	2	9	9	9
Destination's birding tourism resources featured on New Trends and Outlooks (NTO) website	9	9	9	1	1	9	9	9	9
Destination's birding tourism resources featured on national conservation agency website	1	1	1	1	9	9	9	9	9
Environmental treaty ratification	4	2	6	3	7	1	5	7	4
Protected areas as a %	9	8	4	3	5	6	7	2	1

[22] Analysis based on data in the World Economic Forum (WEF) *Travel and Tourism Competitiveness Report 2009,* and the United Nations World Tourism Organisation (UNWTO) Tourism Barometer.

Avitourism Indicators	South Africa	Kenya	Uganda	Brazil	Thailand	Australia	Namibia	Botswana	Tanzania
of total land area									
Total Score: Avitourism	**61**	62	70	**32**	69	**52**	95	96	65
Rank: Avitourism	**3rd**	4th	7th	**1st**	6th	**2nd**	7th	8th	5th
Connectivity	1	5	9	6	3	2	4	7	8
Visa requirements	4	7	7	5	1	7	2	3	6
Seat kilometres (international)	4	5	6	3	1	2	8	9	7
Departures per 1 000 population	4	7	9	5	6	1	3	2	8
Airport density	6	8	9	4	5	1	2	3	7
Number of operating airlines	3	5	7	4	1	2	8	9	6
Road density	1	5	2	3	4	6	8	9	7
Presence of major car rental companies	1	4	2	3	3	1	4	4	5
Hotel rooms	5	7	8	0	2	1	4	3	6
% World market share	2	7	6	3	1	3	4	8	5
Marketing presence in major source markets	3	1	7	9	2	4	5	6	8
Market share of birding source markets	4	5	9	3	1	2	8	7	6
Travel and Tourism (T&T) government expenditure	9	1	8	7	6	4	5	2	3
T&T fair attendance	3	2	5	2	1	3	4	4	2
Total Score: General Tourism	**50**	69	94	57	**37**	**39**	69	76	84
Rank: General Tourism	3rd	5th	9th	4th	1st	2nd	5th	7th	8th
Weighted Overall Score									
(Avitourism, 65%; General tourism, 35%)	116.1	130.3	158.0	81.7	118.1	96.5	174.8	180.9	144.5
Weighted Overall Rank	**3rd**	5th	7th	**1st**	4th	**2nd**	8th	9th	6th

Brazil is ranked first with respect to birding tourism, followed by Australia (second) and South Africa (third). In terms of general tourism, Thailand and Australia are ranked first and second respectively, followed by South Africa in third place. Overall (i.e. birding tourism and general tourism combined),[23] Brazil is ranked first, Australia second, South Africa third and Thailand fourth. Based on these overall rankings, **Brazil, Australia and Thailand are therefore among South Africa's main avitourism competitors.**

A more detailed analysis of South Africa's relative strengths and associated opportunities to build on these strengths is presented below.

3.5.1 Strengths of and opportunities for South Africa as an avitourism market

Strengths

In summary, South Africa's principal strengths are the presence of rare and endemic bird species, relative accessibility, sound birding infrastructure, the presence of potentially complementary tourism offerings, and a robust network of information providers and other supportive stakeholders.

More specifically, South Africa's strengths include:

- Attractive core birding assets compared to competitor birding locations – in particular bird endemism and rarity, e.g.:
  - Of the more than 900 bird species in Southern Africa, 725 occur in South Africa.
  - Large numbers of birds can be viewed easily within a short period, e.g. avitourists can look forward to a three-week-trip expectation of 400 species, a higher expectation than for a three-week trip in Namibia, Botswana, or Australia.
  - There are 27 endemic species (a higher number of endemic species than in Kenya and Uganda), most of them in the country's unique biomes – namely grassland, fynbos and karoo.
- South Africa has high topographical and biome variety in close proximity. This provides for varied holidays.
- There is an extensive relevant man-made infrastructure (e.g. picnic and camp sites, bird hides, etc.).
- Numerous birding routes have been developed that complement the country's IBAs and other birding hotspots.
- Attractive birding locations and hotspots are present in many areas of the country, many of which do not yet have high tourist volumes and therefore present opportunities for birders that do not enjoy crowded areas.
- There are community guides.
- There are various complementary tourist offerings that could be attractive to birders or their non-birder travelling companions, e.g. diversity of landscapes, scenic beauty and historical/cultural attractions, friendly people, and good food.
- There is relative ease of self-organised travel – the presence of many car-rental companies, good road infrastructure, and established self-catering accommodation in many birding areas.
- An established local birding community and supportive organisations are a solid source of birding information.

[23] A weighted scoring system was developed by the Kaiser Consortium to calculate the overall rankings – more emphasis was placed on avitourism indicators (weighting of 65%) than on general tourism indicators (weighting of 35%).

Opportunities

These strengths present certain opportunities for avitourism in South Africa.

Table 7: Avitourism opportunities

National Tourism Growth Strategy Objective	Avitourism Opportunity
Grow volume	▶ Increased awareness by wildlife accommodation providers of avitourism opportunities in their areas can help to attract avitourists and also offer dual marketing opportunities. ▶ Rising affluence levels in South Africa (e.g. greater interest by 'Black Diamonds' in birding in medium to long term) can increase the number of casual and enthusiastic domestic avitourists. ▶ Internationally, avitourism development efforts could tap into existing efforts to target Europe, Australasia, East and West Africa, the Southern African Development Community (SADC) and North America.
Increase tourist spend	▶ Rising affluence levels in South Africa present the potential for new avitourist spenders to emerge. ▶ More corporate sponsorship and a more active calendar of events can increase awareness of avitourism opportunities among a wider range of consumers. ▶ There is evidence of significant economic impact in other countries.
Increase length of stay	▶ Birding add-ons may attract groups with mixed interests, e.g. family trips. ▶ Birding may be an add-on to other trips, e.g. business or VFR trip add-ons for casual or novice birders. ▶ There is evidence from other countries of the successful targeting of these types of birders.
Improve seasonality	▶ There is a low level of existing pelagic touring activity relative to the attractiveness of the asset (of birds that live on the ocean). ▶ International visitors may tour in South Africa's off-peak seasons. ▶ Domestic short breaks and long trips occur throughout the year. ▶ Some spectacles and events can create opportunities in off-peak seasons.
Improve geographic spread	▶ There are strong linkages between avitourism and conservation activities/protected areas. ▶ Event-based activity (including greater focus on inclusion of international visitors) can be promoted, e.g. competitions and birder weekends.
Transformation	▶ Avitourism also enjoys corporate sponsorship from some of the biggest companies in the country who now provide, and may further provide, funding for a wide range of activities, including bird-guide training and community ecotourism projects. ▶ Avitourism may be linked to wider local economic development training. ▶ B-BBEE (Broad-Based Black Economic Empowerment) avitourist-aware self-catering accommodation establishments may be needed close to birding sites.

3.5.2 Weaknesses and threats

Despite these strengths and opportunities, South Africa faces certain weaknesses which present threats to the continued viability and growth of avitourism.

Weaknesses

The most significant weaknesses, particularly when viewed in comparison to South Africa's competitor locations, are:

- Lack of co-ordination among role-players;
- International avitourism volumes may be insufficient to justify sizeable expenditures relative to other niche markets;
- Lack of data on avitourism may hamper planning;
- Limited use of existing avitourism infrastructure in low-volume tourism destinations;
- It is hard to influence fanatical birders – they aim for maximum bird-list yield in the shortest amount of time;
- Birders are unlikely to be attracted to a geographic area if the core bird species are not abundant;
- Presence of migrant bird species in South Africa that avitourists may choose to view elsewhere;
- Limited transformation of industry to date (based on available information); and
- Limited opportunities for tour operators within the domestic avitourism market, given avitourists' preference for self-organised travel.

Threats

Potential threats to the development of avitourism as presented below:

Table 8: Avitourism Threats

National Tourism Objective	Avitourism Threats
Grow volume	▶ There is a reduction of bird species, in particular endemics and endangered species. ▶ Environmental degradation or the pollution of avitourism areas detract from their desirability. ▶ There are concerns about the personal safety of birders. ▶ Increased competition is being experienced from other locations.
Increase tourist spend	▶ International avitourists often travel in their home regions, and long-haul to South Africa introduces additional costs. ▶ Increased competition is being experienced from other locations. ▶ Avitourists are inclined to organise their own tours and accommodation.
Increase length of stay	▶ Extended stays might be elsewhere in the region outside South Africa.
Improve seasonality	▶ Casual birders/trips with birding add-ons are less likely to impact on seasonal spread. ▶ Migratory-bird spectacles occur throughout the year.
Improve geographic spread	▶ Personal safety is a concern when travelling in remote areas. ▶ There is a clustering of existing birding infrastructure in provinces with existing high tourism-visitor numbers.
Transformation	▶ Avitourism segments are potentially financially less attractive to commercial B-BBEE operators than other higher-yielding and larger-scale segments (e.g. wildlife). ▶ There are sustainability and scalability challenges for community-based operators, e.g. economies of scale, consistency of demand.

3.6 Potential of avitourism to contribute to National Tourism Growth Strategy and **the dti** objectives

The avitourism niche market has the potential to impact a number of sectors (e.g. accommodation providers, guides, and equipment retailers) and geographies (e.g. in urban and rural areas throughout the country). Expansion of the industry in South Africa possesses the potential to contribute meaningfully to **the dti**'s efforts to increase sustainable employment and enterprise creation and development. The highest potential sub-segment of avitourists is those who identify themselves as 'enthusiastic'. Avitourism's potential impact within each of the National Tourism Growth Strategy objectives is discussed in more detail below.

Grow volumes

South Africa contains a strong birding asset and infrastructure base for avitourism, making it a competitive international destination. However, of the three million trips undertaken by avitourists around the world each year, research suggests that South Africa is capturing only 8 000 to 16 000 international avitourists. Additionally, the relatively low number of South Africans participating in domestic avitourism activities regularly, between 13 000 and 24 000 each year, suggests that there is significant scope to grow volumes within this niche segment. The attendance of tens of thousands of participants in bird fairs and weekends throughout South Africa suggests that, given attractive programming, interest in avitourism has scope for significant expansion.

Increase tourist spend

Avitourists are more affluent than the typical South African tourist – 35% have household incomes in excess of R40 000 per month. An additional 21% have incomes of between R25 000 and R39 999 per month. Research indicates that these avitourists spend between R927m and R1,725bn on trips and equipment a year. Expenditure included items such as accommodation, food and beverages, transport, and guide fees through to binoculars, camera equipment, birder books and magazines, and telescopes.

The greater the level of avidity of the avitourists, the greater the aggregate level of spend, suggesting that efforts to increase interest in birding (and the avidity of birders) may yield even greater revenues across a broad range of sectors. Enthusiastic birders, for example, spend an average of R38 374 more per year on avitourism and birding equipment than casual birders.

Increase length of stay

Avitourism presents an opportunity for increasing length of stay, not just for dedicated avitourists but for general tourists as well. At present, international avitourists take an average of about 11 day trips, six trips of between one and three nights, and 13 longer holidays (more than three nights) a year for the purposes of birding. More broadly, these same tourists spend about 13 day trips, eight trips of between one and three nights, and 16 longer holidays (more than three nights) for general leisure purposes each year. So, although the majority of their time is spent birding, some of it is devoted to other activities. 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 have the same effect. This same opportunity exists with domestic avitourists and other domestic travellers.

Improve seasonality

Certain avitourism activities are most attractive in South Africa's off-peak season. Pelagics (birds that live on the ocean) represent an opportunity to improve seasonality. Despite the challenges posed by rough seas, the best time for viewing pelagics in South Africa occurs during the Southern hemisphere's winter. Since the infrastructure used for pelagic touring often has a dual purpose (e.g. used for whale-watching, shark-cage diving, and fishing), promoting pelagic touring in particular can improve uptake of other tourism activities during the off-peak season. Moreover, from a domestic avitourism perspective, opportunities for viewing bird spectacles and vagrants, for example, occur throughout the year.

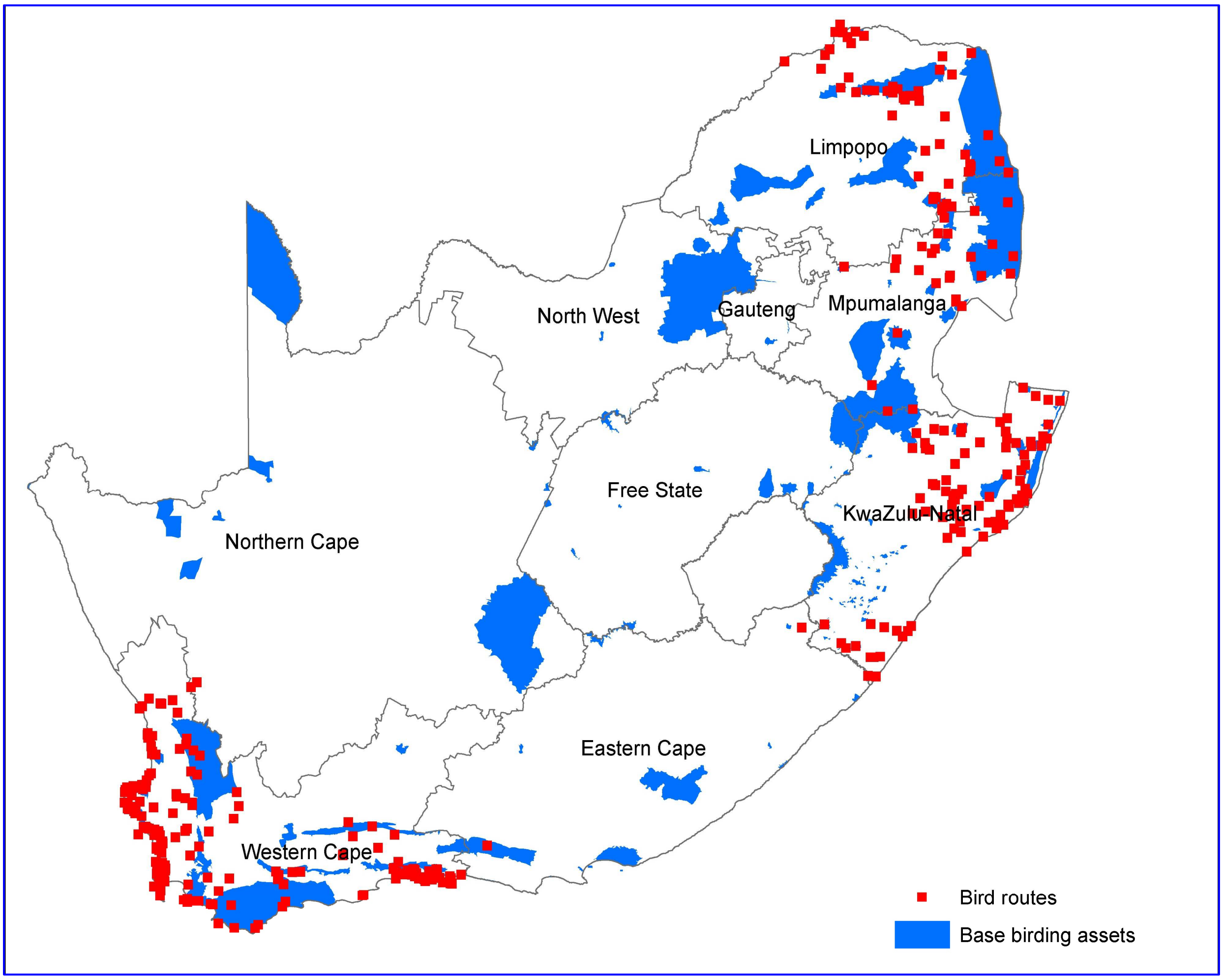
Improve geographic spread

According to research conducted for this report, domestic avitourists spent the largest amount of their birding time in the Western Cape (25%), 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 Free State (the least-popular birding destination at less than 2% of time). International avitourists followed a different pattern, with 23% of their birding time spent in Gauteng, 21% in Mpumalanga, 13% in Limpopo and the Western Cape, and less than 10% in all the other provinces. These patterns are more widely spread geographically than the behaviour observed in South Africa's general tourism visitors.

Base birding assets (i.e. IBAs, Ramsar wetlands sites and birding hotspots) and marketed bird routes, which are often in rural and remote areas throughout all nine provinces, are shown on the map below.

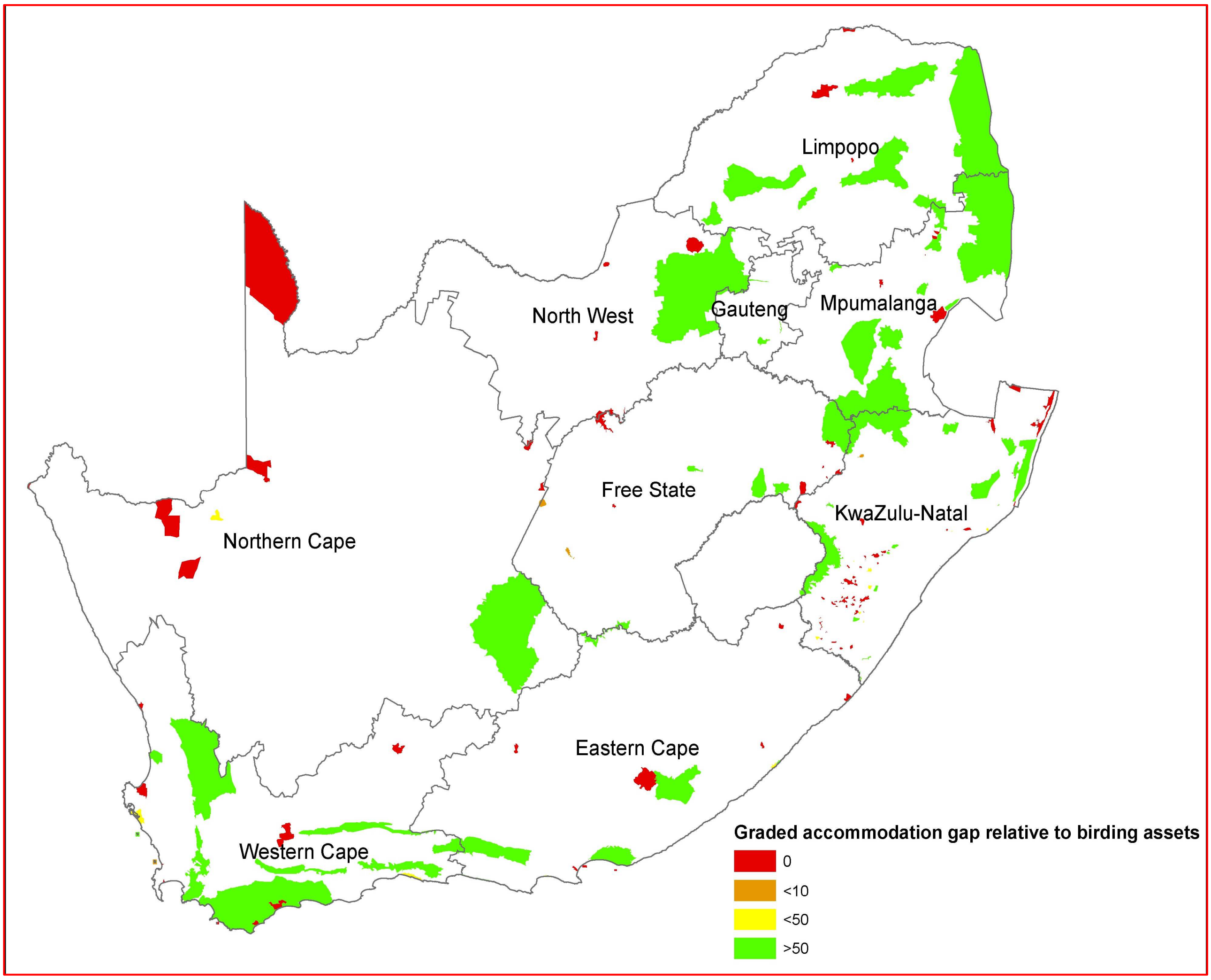
Figure 3: Geographical distribution of base birding assets[24]



One intervention to improve geographic spread may be the provision of suitable accommodation in close proximity to currently underserved birding sites. The map below provides an initial indication of these areas based on the number of accommodations graded by the Tourism Grading Council of South Africa (TGCSA) and within 20 kilometres of a base birding asset. A more detailed analysis of accommodation gaps (including ungraded amenities) is required to complete this exercise, as is a detailed demand analysis per area.

Figure 4: Gap assessment of graded accommodation relative to avitourism areas[25]

[24] BirdLife SA, University of Cape Town Animal Demography Unit, Tourism Grading Council of South Africa.



As can be seen from Figure 4 above, the areas with the biggest shortfalls in accommodation for avitourists occur in the Northern Cape and KwaZulu-Natal. The areas that have the highest density of accommodatior for avitourists are in Limpopo, Mpumalanga, and the Western Cape. Improving the availability o accommodation in areas with the greatest need may therefore result in a more even distribution o avitourists around the country.

Promote transformation

Research conducted for this report suggests that South Africa's domestic and international avitourists spenc up to R47 million a year on tour guides. The majority of these avitourists reported a preference for birding ir small groups (groups of one to four 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 use community guides. Given the current size of the overall spend on tour guides and the underuse of community guides, expanding the use of community guides carries the potential for significan economic benefit to previously disadvantaged people and communities, in particular in terms of support for livelihoods (e.g. increased incomes), enterprise development, capacity building, and a sense o empowerment and self-worth.[26] Opportunities also exist in the provision of B-BBEE-owned and -managec accommodation, particularly in areas that are currently underserved.

[25] Kaiser Associates analysis based on data from BirdLife SA, Animal Demography Unit and TGCSA.
[26] Biggs (2006).

Moreover, bird-route development has a positive impact on local communities by creating socio-economic wealth and environmental conservation (e.g. through the creation of, or increase in, birding facilities, small nature reserves, walking trails, bed-and-breakfast accommodation and hotels). Birding has also encouraged community-based avitourism projects in South Africa.[27]

[27] Vorona & Rodrigo (2007).

4. Recommendations and Implementation plan

A number of recommendations to improve the overall co-ordination and development of the avitourism sector in South Africa emerged from the research and analysis conducted for this study. The proposed recommendations are proportionate in effort and spend to the potential impact of avitourism as a niche market segment.

4.1 Cross-cutting recommendations

These **recommendations address industry-wide strategic issues** facing the sector and, as such, are aimed at improving the avitourism niche market's ability to assist in meeting all six National Tourism Growth Strategy objectives. These recommendations are intended to provide a framework within which narrower interventions, targeted specifically at growing volumes or increasing spend, for example, may be implemented.

4.1.1 Recommendation 1: Establish a national avitourism forum

Rationale/justification

Establishing a national avitourism forum will address current challenges such as industry fragmentation and lack of trust between the key stakeholders in avitourism. Such a forum would ensure inclusive policy- and decision-making, and facilitate better implementation through improved co-ordination and co-operation among role-players. The forum would also assign clear leadership roles for the development of avitourism.

By addressing industry-wide strategy and operational issues, this recommendation addresses all six National Tourism Growth Strategy objectives.

Description

The forum could consist of key stakeholders in the avitourism value chain, including:

- BirdLife SA;
- Southern African Tourism Services Association (SATSA);
- **the dti**;
- SAT;
- Department of Tourism;
- Department of Environmental Affairs;
- Provincial tourism agencies;
- South Africa National Parks (SANParks);
- Birding tour operators (specialists and general operators who offer birding);
- Conservation groups, e.g. World Wildlife Fund for Nature, Endangered Wildlife Trust;
- Research institutes/ornithological societies, e.g. the Animal Demography Unit of the University of Cape Town (UCT);
- Prominent corporates and state-owned enterprises currently making significant contributions to birding, e.g. De Beers, Sasol, Eskom, and Rio Tinto; and
- Community-based organisations in established and emerging birding areas.

The forum's primary activities could include policy-implementation support, marketing, lobbying, and education or awareness. Further issues to be refined and agreed upon would include the legal status of the forum, whether the forum should have its own secretariat, funding sources (e.g. payment of membership fees), and whether the forum should be led by government or the private sector.

Implementation plan

Separately from (and perhaps preceding) the establishment of the proposed forum, discussions should be held between key government departments (e.g. **the dti**, the Department of Tourism and the Department of Environmental Affairs) to decide on which public entities are best placed to lead policy-making, implementation and co-ordination for avitourism in South Africa, and what the role of the private sector should be. **the dti** may play an initial role in facilitating the establishment of the forum. This is a critical and fundamental first step, as it will have a bearing on the nature and form of the avitourism forum and all other planning and support activities for the sector.

The proposed implementation plan for the national avitourism forum is as follows:

Table 9: Proposed implementation plan: National Avitourism Forum

Intervention	Key activities	Key Performance Indicators (KPIs)	Suggested role-players	Time frames
▶ Canvass support and buy-in of identified target members.	▶ Conduct workshops, seminars. ▶ Institute process for public comments/ submissions.	▶ Secure formal commitment from stakeholders. ▶ Agree on mandate and legal status of forum. ▶ Agree on leadership of the forum.	▶ BirdLife SA ▶ Department of Tourism ▶ SAT	▶ 3 months
▶ Establish forum.	▶ Implement agreed institutional arrangements. ▶ Develop strategy and action plan with specified timeframes (focus on Year 1). ▶ Clarify status in relation to government avitourism policy makers.	▶ Convene first and subsequent meetings. ▶ Determine progress in delivering on agreed priority issues/ performance areas. ▶ Look into potential establishment of thematic sub-committees/working groups.	▶ BirdLife SA ▶ Department of Tourism (as convenors and secretarial support)	▶ 3 months

4.1.2 Recommendation 2: South Africa's market segmentation should target marketing efforts to casual and enthusiastic birders

Rationale/justification

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.

Casual birders typically include those interested in other outdoor and nature-based activities (e.g. whale-watching, wildlife, 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.

Description

Avitourism market profiles (and consequent product development and marketing) should prioritise casual and enthusiastic birders.

Implementation plan

Table 10: Proposed implementation plan: Avitourism marketing

Intervention	Key activities	KPIs	Suggested role-players	Time frames
▸ Educational activities to improve awareness of birding and avitourism	▸ Inserts in radio and TV programmes, e.g. 50/50; ▸ Increased support (e.g. funding) for birding events so that they are on a larger scale and exposed to a wider audience; ▸ Stronger focus on youth, 'the avitourists of tomorrow' – school competitions and curricula, Girl Guides/Boy Scouts, youth-oriented bird clubs, etc.; and ▸ Workshops with IDP/LED officials in municipalities in areas with high avitourism potential.	▸ Public awareness of avitourism (e.g. measured through periodic consumer surveys).	▸ Department of Tourism ▸ BirdLife SA	▸ Ongoing
▸ Marketing and promotional activities	▸ Develop a marketing strategy for South African avitourism based on media preferences (e.g. online fora and nature and lifestyle magazines targeting categories with a high LSM); and ▸ Potential issues to address include: – Domestic market segmentation that prioritises novice, casual and enthusiastic birders; and – Building relationships with tour operators to better understand and reach the markets.	▸ Increase in the number of casual and enthusiastic avitourists.	▸ SAT ▸ BirdLife SA ▸ Department of Tourism	▸ Ongoing
▸ Avitourism product development	▸ Joint product development and marketing of avitourism with other tourism niches, e.g. cultural tourism, backpacking, whale-watching, hiking and trailing, botanical tourism, and wildlife tourism.	▸ Wider avitourism product portfolio with strong links to other tourism sub-sectors.	▸ Department of Tourism ▸ BirdLife SA ▸ SAT ▸ Provincial and local tourism agencies	▸ Ongoing

4.1.3 Recommendation 3: Develop a single, comprehensive website to serve as a portal to all avitourism opportunities in South Africa

Rationale/Justification

Existing websites on avitourism highlight birding opportunities only in specific geographies, or avitourism products offered by specific entities. There is currently no overall source of information on avitourism in South Africa with balanced content to address all avitourists' potential needs, e.g. accommodation, interactive maps, equipment suppliers, geographical and topographical information, etc. A website is also a cost-effective marketing tool, freeing up resources to be used on other aspects of avitourism development.

Description

The Internet is a heavily used tool by all categories of birders, and the availability of detailed and reliable electronic information on avitourism in South Africa is essential. A dedicated website to serve as a one-stop shop would be an ideal way to make contact with both domestic and international birders. The website could also serve as a useful resource and reference point as part of wider educational activities to improve awareness and understanding of avitourism within South Africa.

Implementation plan

Table 11: Proposed implementation plan: Avitourism website

Intervention	Key activities	KPIs	Suggested role-players	Time frames
▶ Develop a national avitourism website.	▶ Collect data for the website, e.g. ornithological data, Graphic Information System (GIS) mapping, profiles of birding locations, details of accommodation service providers, biodiversity data for the different regions, general tourism infrastructure in an area, profiles and contacts of key institutions, and avitourism market research. ▶ Review websites in other countries for benchmarking purposes: – Format and design; and – Content style, and level of detail. ▶ Hyperlink the avitourism website to other Internet sites already frequently used by birders, avitourists and general tourists. ▶ Ensure visibility of the website, e.g. arrangements with Google and other search engines to list the website in the top 10 results when common search terms are entered.	▶ Successful launch of website; ▶ Traffic to website; and ▶ Depth of website content.	▶ BirdLife SA (to lead) in consultation with: – UCT Animal Demography Unit – UCT Percy Fitzpatrick Institute of Ornithology – Publishers of major field guides, books, atlases and other sources of information – SAT – Department of Tourism – Department of Environmental Affairs – SATSA – Bird clubs (not affiliated)	▶ 4 months
▶ On-going website maintenance and development	▶ Update data. ▶ Resolve technical problems. ▶ Add new features, e.g. fora, articles, and search function.	▶ Traffic to website; ▶ Number of website queries/ complaints/ compliments received; and ▶ Depth of website content	▶ BirdLife SA	▶ Ongoing

4.1.4 Recommendation 4: Introduce a new system of data collection and management for avitourism

Rationale/justification

Introducing a new system of data collection and management could address the current lack of up-to-date, comprehensive information on all aspects of avitourism in South Africa. Having such information readily available will facilitate accurate and relevant avitourism planning, based on a sound understanding of both the demand and the supply sides of the market.

Description

Capture birding-specific information by including avitourism in SAT's/Statistics SA's sector surveys, e.g. exit surveys conducted at major ports. The survey conducted by the Kaiser-Anchor-ED/GE Consortium as part of this project (posted online and published in a popular birding magazine) could also be conducted on an annual basis and on a wider scale. Similar studies to the current report could also be conducted more frequently. Additionally, information on the birding infrastructure contained in South Africa relative to competitor locations could be updated on a bi-annual basis (see *Research and Analysis* report for detailed descriptions).

Implementation plan

Table 12: Proposed implementation plan: Avitourism research and data collection

Intervention	Key activities	KPIs	Suggested role-players	Time frames
▶ Develop a store of information on avitourism in South Africa.	▶ Conduct surveys and research projects to collect baseline data. ▶ Canvass universities and other relevant institutions for in-house avitourism research.	▶ Number of reports; ▶ Number of surveys; ▶ Recentness of data; and ▶ Quality and variety of content, e.g. should include data that can be used for planning and policy-making purposes, as well as data that is relevant and useful for avitourists.	▶ BirdLife SA and Department of Tourism (planning and co-ordination) ▶ Tourism Satellite Account, Statistics SA, SAT (operational support)	▶ Three months initially ▶ Ongoing
▶ Develop capacity to conduct and co-ordinate research, and to understand policy implications.	▶ Establish and leverage strategic partnerships with key institutions strong in this area.	▶ Sector reports (including trend analysis and policy recommendations); and ▶ Number of skilled analysts recruited.	▶ BirdLife SA ▶ Department of Tourism ▶ Statistics South Africa	▶ Ongoing

4.2 Recommendations for meeting National Tourism Growth Strategy objectives

Beyond the cross-cutting recommendations presented in the previous section, a number of interventions to address specific National Tourism Growth Strategy objectives are presented below. Unlike the cross-cutting recommendations discussed above, these interventions are targeted at meeting specific targets within each of the six objectives.

i. Grow volumes

Table 13: Recommended interventions to grow volumes

Intervention	Key activities	KPIs	Suggested role-players	Time frames
▶ Promote SA's avitourism resources to attract birders in markets with high growth potential.	▶ Target segments such as: – USA – NSSA and Wanderluster segments; and – SA – Well-off Homely Couples.	▶ The year-on-year increase in new visitors within each targeted segment.	▶ SAT ▶ BirdLife SA ▶ Department of Tourism	▶ 3 months (selection of targets) ▶ 6 – 12 months (marketing) ▶ Ongoing (data collection and adjustment of strategy)
▶ Address destination perceptions/ concerns of high-growth potential markets.	▶ Consult birding tour operators, accommodation establishments, etc. to gain a better understanding of avitourists' concerns (e.g. lack of reliability in guides, accessibility of sites, etc.). ▶ Proposed avitourism website and marketing materials should include sections dealing with known avitourist concerns. ▶ Co-ordinate key messages with South African Tourism, International Marketing Council (IMC).	▶ Establishment of direct communication channels to access consumer sentiments, e.g. 'comments' section on proposed avitourism website; and ▶ Increased co-operation with key entities responsible for shaping South Africa's image as a tourist destination.	▶ Department of Tourism and BirdLife SA (lead) in consultation with: – Other bird clubs – SANParks – Birding tour operators – SAT – IMC	▶ 3 months initially ▶ Ongoing
▶ Promote birding as an additional destination activity among markets with a high inclination to participate in nature-based activities, e.g. wildlife viewing.	▶ Joint marketing of birding with other nature-based activities.	▶ Increase in the number of avitourists, particularly in the casual and enthusiastic categories.	▶ SAT ▶ Provincial and local tourism agencies	▶ 6 months initially ▶ Ongoing

ii. Increase length of stay

Table 14: Recommended interventions to increase length of stay

Intervention	Key activities	Key Performance Indicators (KPIs)	Suggested role-players	Time frames
▸ Highlight birding opportunities as an additional activity for markets (not necessarily birders) known to have long trip durations.	▸ Support the development of birding and appropriate complementary tourism products in local communities.	▸ Increase in the number of bed nights recorded.	▸ Department of Tourism ▸ SAT	▸ 1 month initially ▸ Ongoing
▸ Promote birding as an additional destination activity among markets with a high inclination to participate in nature-based activities, e.g. wildlife viewing.	▸ Joint marketing of birding with other nature-based activities.	▸ Increase in the number of avitourists, particularly in the casual and enthusiastic categories.	▸ Department of Tourism ▸ SAT ▸ Provincial and local tourism agencies	▸ Ongoing

iii. Improve seasonality

Table 15: Recommended interventions to improve seasonality patterns

Intervention	Key activities	KPIs	Suggested role-players	Time frames
Highlight birding opportunities as an additional activity to non- or casual birders in segments with high propensity to travel out of season (Netherlands – Senior Explorers, SA-Golden Active Couples).	▸ Consistent, year-round marketing, e.g.: – Proposed avitourism website should make specific reference to off-season avitourism opportunities. – Negotiate discounts and special prices with birding-service providers during the off season.	▸ Agreements with avitourism service providers.	▸ Department of Tourism ▸ BirdLife SA	▸ 6 months initially ▸ On-going
Promote SA as birding destination in segments with high propensity to travel out of season, e.g. Japan – Senior Explorers.	▸ Create additional events to draw this segment to SA. ▸ Not necessarily birding-specific.	▸ Increased number of general tourism events in the off season.	▸ Department of Tourism ▸ SAT	▸ 6 months initially ▸ On-going
Promote off-season birding events and pelagic tours.	▸ Develop readily accessible database of existing off-season birding events. ▸ Create new off-season birding events. ▸ Joint marketing of off-season birding events with other off-season activities. ▸ Joint marketing of pelagic opportunities with other water-based tourism opportunities as part of an Integrated Ocean Tourism strategy. ▸ Change the strict regulations of the South African Maritime Safety Authority (SAMSA) on boat passenger numbers, and making Maritime and Coastal Management (MCM) permits more readily accessible.	▸ List of birding events evenly spread across the off season; ▸ Number of new off-season birding events created; and ▸ Increased awareness and uptake of pelagic opportunities.	▸ SAT ▸ BirdLife SA ▸ Department of Tourism	▸ 1 month initially ▸ On-going

iv. Increase tourist spend

Table 16: Recommended interventions to increase tourist spend

Intervention	Key activities	KPIs	Suggested role-players	Time frames
Promote SA's avitourism resources to attract birders in high-value segments.	Target segments such as: – SA – Independent Young Couple and Families; and – UK and US – NSSA.	Increase in the number of avitourists fitting these profiles.	Department of Tourism SAT BirdLife SA	6 months initially On-going
Encourage the development of mid-priced services targeting casual/enthusiastic domestic and international birders.	Facilitate service-provider access to market research on the needs of this market segment. Support service providers in product development, e.g. incentives.	Increase in mid-priced service offerings (i.e. more price options for birders).	BirdLife SA Department of Tourism **the dti**	6 months initially On-going

v. Improve geographic spread

Table 17: Recommended interventions to improve geographic spread

Intervention	Key activities	KPIs	Suggested role-players	Time frames
Showcase birding opportunities at destinations outside of major tourism areas to markets with inclination and time to explore 'off the beaten track', e.g. SA – Golden Active Couples.	Select avitourism attractions in low-volume provinces. Convene role-players for the development of marketing efforts.	Increase in visitors to low-volume avitourism attractions.	SAT Department of Tourism (national) BirdLife SA Provincial tourism departments	1 month (selection of low-volume sites) 3 months (co-ordination of marketing efforts)
List birding hotspots and other avitourism attractions on websites.	Consolidate lists of attractions. Construct a database of GPS co-ordinates of sightings.	Increase in visitor numbers at previously low-volume avitourism attractions.	BirdLife SA Birding fora and listservs	3 months (initially) Ongoing

vi. Promote transformation

Table 18: Recommendations to promote transformation

Intervention	Key activities	KPIs	Suggested role-players	Time frames
▸ Provide more support for community guides.	▸ Expand training programmes. ▸ Secure increased corporate sponsorship. ▸ Create a central registry of community guides.	▸ Increased number of community guides; and ▸ Increased usage of community guides by domestic and international avitourists.	▸ BirdLife SA ▸ Department of Tourism ▸ Corporates	▸ 3 months (identification of corporate sponsors) ▸ 6 months (recruiting and development) ▸ Ongoing (training)
▸ Encourage joint marketing of birding with local cultural attractions to reach market segments with wider interest in local communities and their history, e.g. Germany – Senior Explorers.	▸ Include product development of local culture/tourism so that it is attractive and of interest to target markets	▸ More B-BBEE tourism-service providers.	▸ BirdLife SA ▸ SAT ▸ Department of Tourism	▸ 3 months
▸ Alert tourism-industry participants of the B-BBEE opportunities presented by avitourism (e.g. partnerships).	▸ Develop information material on the avitourism sector for the broader tourism community.	▸ Increase in cross-sector partnerships.	▸ SATSA ▸ SAT ▸ BirdLife SA ▸ **the dti**	▸ 3 months
▸ Identify opportunities to provide accommodation, particularly in areas that are currently underserved.	▸ Identify underserved areas. ▸ Verify demand in these areas. ▸ Alert communities to the opportunities presented.	▸ Increase in number of B-BBEE accommodation establishments in selected areas.	▸ BirdLife SA ▸ TGCSA ▸ SAT ▸ The Department of Tourism ▸ **the dti** (e.g. incentive support for small, micro- and medium enterprises (SMMEs))	▸ 3 months (identification) ▸ 6 months (verification) ▸ On-going (investment)

Appendix A: Profiles of International Avitourism Market Segments

Next Stop South Africa (NSSA)	UK	Germany	France	Netherlands	Australia
Demographics					
Region of origin	London 31% South-east 25% Scotland 13%	North Rhine/ Westphalia 23% Bavaria 15%	Ile-de-France 50% Outside Ile-de-France 50%	West — Other 27% South 23% East 15%	Sydney and Melbourne 78% Perth and Brisbane 22%
Gender	Both male and female	Both male and female	Both male and female	-	-
Age	Avg. age 57,3 Majority 50 – 75	Avg. age 51,9 Majority 41 – 60	Avg. Age 52 Majority 41 – 60	Avg. age 52	Avg. age 50
Education	50% higher education	37% higher education	69% higher education	Higher education 40%	-
Employment status	Working full time 57% Retired 27%	Working full time 71%	Working full time 77%	-	-
Household income	p.a., (‘000s £) <50 19% >50 49%	p.a., (10‘000s €) <3,5 39% >3,5 61%	p.a.(10‘000s €) <3 0% 3 – 4 33% >4 67%	p.a., (000’s Euro) <24 11% 24 – 48 41% 48 – 72 34% >72 14%	p.a. A$42 – 104k 71% >A$104k 29%
Marital status	Married/living with partner 88%	Married/living with partner 82%	Married 78%	Married 62%	Married 58%
Children < 18 at home	0%	0%	0%	0%	39%
Travel behaviour					
Average trip length	2- 3 weeks	3 weeks preferred	-	3 weeks preferred	3 – 4 weeks
Avg. # of vacations per year	2,27	4,3	-	0,64 long haul per annum	0,5 long haul per annum
Past destinations (past 5 years)	USA 52% Canada 24% Australia 17% Thailand 10% Kenya 5%	USA 53% Thailand 17% South Africa 17% Canada 16%	Thailand 15% Senegal 9% Reunion 8% China 7%	US 23% Canada 8% (Dutch) Antilles 8% Thailand 6% Indonesia 6%	85% have travelled to six or more long-haul countries 43% to 11 or more
Future destinations (next 2 to 3 years)	(Score of 1 to 7) USA 4,4 Caribbean 3,4 Australia 3,4 Mexico 2,9 Thailand 2,9	USA 30% Australia 28% South Africa 17% Canada 11% New Zealand 10%	Vietnam 17% China 16% Peru 15% France 15% South Africa 10%	USA 18% South Africa 17% Australia 13% Thailand 11% Canada 10%	-
Information sources	Word of Mouth 52% Brochures 23% Books 15% Internet 12% Newspapers 10%	Word of Mouth 41% Brochures 41% Guidebooks 36% Travel magazines 33% Internet: 32%	Word of Mouth 42% Travel Magazines 29% Brochures 18% TV and Radio 18% Travel Agents 17%	Internet 72% Books/guides 40% Travel agent brochures 26%	Internet 64% Travel agents 60% Travel brochures 40%
Travel arrangements	Like to organise their own travel arrangements but can be supported by travel agents (independent but organised in advance)	Prefer to organise themselves Use travel agents, yet they almost exclusively know where to go before visiting a travel agent	Believe travel agents (TAs) and TA brochures are good sources of information when choosing destinations, and to find out more about a destination once selected. Very unlikely to use Internet for booking although may use this channel to gather information on destinations	Likely to have established a relationship with a particular travel agent whom they use for a variety of services including brochures	81% book through travel agents with only 38% booking over the Internet
Travel companions	Significant other 50% Family 28%	Significant other 65%	Significant other 35% Organised Group 29% Friends 14%	Spouse / Partner 68%	No. of days 26 alone 26% Spouse/Partner 55% Children 59%
Destination expectations	Main reason for holiday is to relax, get away, visit friends and relatives, see a specific place with the sun and spending time with their	Travel to ‘experience’ different cultures and natural beauty Nice weather also important	Relaxing outdoor activities – experiencing the natural beauty, viewing wildlife, and visiting mountains	Significantly more likely than average to look for travel destinations with an interesting culture and that offer an authentic experience	Independent travellers (67% travel independently) with a preference for mid- to high-end accommodation (66%

Next Stop South Africa (NSSA)	UK	Germany	France	Netherlands	Australia
	partner Want value for money, good weather, luxury accommodation and to feel safe	Distance and health not important Price of trip is not necessarily an important influencer. High spenders and not necessarily price sensitive	Also very interested in discovering culture High holiday spending, not highly price sensitive	Less likely than average to be concerned with travel expense	staying in 3 to 4-star accommodation) 85% or more consider that exploring different cultures, viewing natural beauty and historical landmarks, local food and wine are important elements in holidays Safety (90%) and value for money (85%) are the most important attributes of international destinations.
Seasonality	Travel whenever: 37%	Aug – Oct: 82%	Aug 35% May 33% April/ March 29%	Relatively flexible; Travel less in summer high-season months	Most popular months: April, September

Appendix B: Preliminary Consumer Descriptions

Domestic avitourist: Preliminary consumer description[28]

Jim is a 49-year-old business manager. He lives with his wife in Randburg. He earns R360 000 a year and is an enthusiastic birder. He first developed an interest in birding about 20 years ago on a family trip to Kruger Park when he saw some beautiful birds. Now the challenge for him is seeing new birds. He is so keen on his hobby that he spent over R55 000 last year on birding trips and equipment.

Now that his children have left the house, Jim and his wife enjoy travelling – particularly to indulge in their habit of bird-watching. They spent 27 days last year on overnight trips, 23 of which were spent bird-watching. They usually drove to their birding sites, but flew when the distance was great enough – Jim is quite willing to travel over 200km for a good birding experience. In total, Jim and his wife spent R16 000 on transport this year.

They usually travel alone as a couple, but sometimes meet up with other couples who also enjoy birding – often couples they met through the local bird club or at one of the birding weekends they attend. They plan most of these trips themselves, consulting bird-club websites and web fora, birding books, and nature magazines. Jim particularly enjoys reading the trip reports that other birders have posted on birding websites, and has used these reports to help him choose his next destination. Most of their travel is to the Western Cape, Mpumalanga, and Limpopo. Jim and his wife are not that fussy about the type of accommodation they use, as long as it is close to the bird-watching sites they visit, but they prefer self-catering if at all possible. Price is not the main driver of their accommodation decisions, although they don't like staying in fancy hotels – Jim was surprised to see that, by the end of the year, he had spent nearly R12 000 on accommodation.

Jim is not a big fan of tours – he likes to see himself as an independent, well-informed traveller. He did go on a pelagic tour from Cape Town last year because he needed boat access to see some special birds, so he used a tour company. In fact, half of the R1 200 he spent on tours was on that one pelagic trip.

Jim plans to travel even more this year as he tries to build-up his 'life list' of birds. His ultimate goal is to see over 700 birds. To do so, he is planning a few trips throughout the Southern African region. Once he has saved up a bit more, he might even manage a few big trips overseas.

[28] Based on SAT Consumer Portrait format

International avitourist: Preliminary consumer description[1]

William is a 53-year-old academic who lives just outside London. He lives with his wife and his youngest child who has not left home yet. He began bird-watching as a child, but got more serious about his hobby after university. He is an active bird-watcher, and belongs to the Royal Society for the Protection of Birds. He has also recently become interested in bird photography, and has bought himself a range of new lenses and a tripod for his digital camera. He has filled up most of his list of birds in Europe and saw quite a few more on his trip to visit his brother in Australia. He recently attended the UK Bird Fair and is now trying to decide between a trip to Brazil or to South Africa for next year.

No matter which location he chooses, he plans to travel for three weeks on a family trip, so that he can see as many birds as possible – he's aiming for at least 500 new species for his list. He has already read some trip reports online, and is trying to decide whether to go for an organised tour with a UK operator or to find local guides by making enquiries through some birding fora. William would prefer to use local guides as he thinks it will increase his chances of seeing his target birds as efficiently as possible.

At the moment, William is leaning towards South Africa. He has heard good things from friends about South Africa's species diversity and is excited about the rare species he might see. His wife has also heard that it is relatively easy to travel around compared to other birding destinations in Africa, family friendly, and there will be some interesting activities to keep their daughter occupied. William is thinking they will visit nature reserves, especially ones where there are birding trails they could do on foot. They think they'll probably stay in game lodges within the reserves, but some nights might be in nearby guest houses. If time allows, they might they use the chance to also see the Big Five and spend a day or two in Cape Town and the Winelands sight-seeing. They are also considering booking a tour that will take them up into Namibia and Botswana after their stay in South Africa.

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