



AN ASSESSMENT OF THE FEASIBILITY OF DEVELOPING BIRDWATCHING AS A TOURISM PRODUCT

[KAJIAN PENILAIAN KE ATAS KEBOLEHLAKSANAAN DALAM
MEMBANGUNAKAN AKTIVITI PEMERHATAN BURUNG SEBAGAI PRODUK
PELANCONGAN]

FINAL REPORT
MARCH 2008



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EXECUTIVE SUMMARY

The attractiveness and unique qualities of birds have long compelled man to watch them. Unsurprisingly, birding (or birdwatching) has become one of most popular hobbies globally. Birding nations such as the United Kingdom (UK) and United States of America (US), have thousands if not millions of birders indulging in this past time. In the UK, the Royal Society for the Protection of Birds (RSPB) currently has more than 1 million birder members.

The desire to watch birds is not only confined to their own country, but birders have begun to venture abroad to various destination countries (e.g. Latin America, South Africa, south-east Asia etc.) in search of more diverse, exotic and unique birds. This has led to the development of the global birding tourism industry which is now one of the fastest growing niches in ecotourism.

Being one of the 12 'megadiversity' countries of the world and boasting a remarkable 745 bird species, equivalent of 8% of the world's total, Malaysia is seen as a potentially important country to develop birding as a serious tourism product. Although no current official statistics available on the number of overseas birder arrivals and the number of birding tour operators is confined to a very small number, it is unofficially believed that Malaysia is already regarded as a must visit destination for birders.

Birding is a greatly undeveloped tourism product and resource in Malaysia. In order to be successful and economically viable, birding is dependent on enhancing and maintaining the quality of the natural resource (i.e. birds and their habitats) and thus, expert knowledge is needed.

In Phase 1 of this project, an assessment was conducted on the feasibility of developing this potential industry. To best develop this product, a comprehensive overview of the situation in the country and region was needed, and an effective strategy to develop and promote birding and birding tourism: as opposed to the present approach where birding is treated as just another activity in natural areas. Phase 2 will involve looking at evaluating nominated Pilot Sites and recommending ways to enhance and improve the quality of the product.

Therefore, the aim of the Phase 1 study is to assess the feasibility of developing birding as a tourism product in Malaysia. The main objectives are;

- To provide an overview of the birding industry.
- To assess Malaysia's birding resources and current activities.
- To identify support mechanisms required for developing Malaysia's birding industry.
- To assist in the identification and nomination of Pilot Sites for Phase 2 of the study.

Overview of the global birding industry

Ecotourism is one of the fastest growing segments of tourism globally. Amongst the many forms of ecotourism, wildlife-related tourism especially birding tourism (or bird tourism) is reportedly the largest and most rapidly growing. Birding tourism is also considered the most environmentally conscious segment of ecotourism and provides hope for many threatened natural areas around the world. Most of the ecotourists originate from **14 main source countries** namely **United Kingdom (UK), USA, Canada, Netherlands, Germany, France, Belgium, Italy, South Africa, Australia, Finland, Sweden, Denmark and Norway.**

Unlike other segments of tourism, birder-centric data (e.g. no. of birders per birding site, no. of days spent, etc.) for most birding destination countries is lacking as neither the respective government agencies nor specific birding site managers maintain a (birding) tourist

information system. However, birding trip reports that are available at online birding resource websites, provide an alternative solution to this shortcoming.

Based on birding trip reports (as at 29 December 2006), the European region (ca. 34% of total trip reports) emerged as a popular birding destination, followed by Africa and Middle East (18%), Asia (18%) and South and Central America (17%). The high weighting towards Europe probably reflects the proximity of the major source countries to the European market. In terms of popular birding countries globally, the top five destinations were Spain, USA, India, Greece and France. **Malaysia is currently ranked 23rd on the list** out of the total 178 countries, or over 1.3% of all trip reports, much on a par with Costa Rica.

However, within the Asian region, countries such as India, Thailand, China (inclusive of Hong Kong S.A.R.) and Malaysia are amongst the most targeted birding destinations in this region. Comparatively;

- Malaysia came in **4th** on the list of 28 Asian countries.
- Malaysia garnered 94 out of an Asian total of 1,228 birding trip reports (ca. **8% of total Asian trip reports**)

Based on these statistics, it seems that **Malaysian avifauna has already generated interest and is attracting serious birders**, but lags well behind three other Asian destinations, mainly India, Thailand and China.

Regional review of leading birding destinations

A brief regional review of four selected countries (**Taiwan, Thailand, India and Hong Kong S.A.R.**) revealed that respective countries have their 'bird product' (i.e. diversity, endemics) and differences in seasonality (i.e. when to visit which is closely linked to climate). However, the lack of (or limited) supporting resources (e.g. information-based materials), infrastructure, marketing and promotions, tourist information system and human capital (e.g. local birding guides) limit or hamper the growth of their birding tourism industry. For India and Thailand, threats of habitat destruction/alteration, poaching and wild bird trade have and will continue their impact their birding tourism industry. While international birding companies operate in these countries, often the development of birding tourism locally is spearheaded by local NGOs.

Malaysia current birding resources

- Malaysia currently has a total of 742 bird species, consisting of both resident and migratory species.
- Malaysia has a total of 43 endemics and 28 'near-endemics'. Of the 43 endemics, 39 are found in East Malaysia whilst Peninsular Malaysia supports four species. Endemic birds are the '*Unique Selling Concept*' of birding tourism.
- Malaysia also supports a large number of charismatic birds i.e. pittas (11 species in Malaysia), trogons (7), broadbills (9) and hornbills (10) and three families unique to Asia i.e. the Asian Barbets, loras and Leafbirds.
- Important Bird Areas (IBAs) in Malaysia are 'high value' birding sites, many of which have untapped potential and unknown to overseas birders. There are currently 55 IBAs in the country.
- Birders cite bird resources (i.e. diversity, endemics, charismatic species), availability of bird/birding information, site accessibility and security as factors in deciding on a destination country. However, the current lack of bird/birding-related information (online and print) and good/experienced birding guides in the country is a negative for Malaysia.

Current birding route and operations in Malaysia

There are at least 20 overseas birding tour companies that include Malaysia regularly and/or periodically in their tour calendar. Very few local tour operators specialize in birding tours but include them as part of their services.

Most of the foreign birders will follow a Peninsular Malaysia birding route which covers **Kuala Selangor Nature Park, Fraser's Hill and Taman Negara (Kuala Tahan)** with a birding tour group. Likewise for East Malaysia, **Danum Valley, Kinabalu Park, Sukau (Kinabatangan) (and at times, Poring Hot Springs and Sepilok)** are part of their East Malaysian birding route. Independent foreign birders also visit these sites. These sites in both Peninsular and East Malaysia are equally popular with local birders. However, independent foreign and local birders will also visit other birding sites apart from these well-known destinations.

Current birding activities in Malaysia

A survey was conducted amongst local and foreign birders to ascertain their demographics and patterns of birding in the country. The survey results provided an insight into the profiles of the foreign and local birders below.

Foreign birder

- European (mostly British) or Australian, male between 31-50 years old or retired.
- Currently be employed in a science- and/or conservation-related profession earning at least USD50,000 per annum.
- Have at least 10 years of birding experience.
- Have visited Malaysia previously on a birding holiday or on other business. For the latter, opportunistic birding is considered.
- Stays for about 1-2 weeks in Malaysia birding. Some spend more (8-21 days).
- Accompanied by family, friend(s), part of a birding tour group or independent.
- Willing to spend about RM201-400 daily on land expenses (i.e. accommodation, fees, local transport, food).
- Feels safe birding in Malaysia.
- The country has the birds/bird family groups that he wanted to 'tick' on his want list.
- Recommendations from birding friends will influence and help him make a decision to come to Malaysia.
- Number of species, presence of endemics and rarities and birding sites in protected area are important site selection factors.
- In Malaysia, he will not miss visiting Kuala Selangor Nature Park, Taman Negara (Kuala Tahan), Fraser's Hill in Peninsular Malaysia and Kinabalu Park, Danum Valley and Sukau in Sabah. Independent birders (not with overseas guided birding groups) will likely explore more birding sites that are not on this route.
- He has a birding guide with him if he is with a birding group.
- Ensuite bathroom with hot water, 24-hour electricity supply and a ceiling fan are the amenities that they appreciate.
- He would like to purchase some birding related publications and clothing should they be available.
- He is very concerned about the environmental degradation that is happening in Malaysia.

Local birder

- Male Malaysian Chinese, aged between 41-50 years old or close to/are retired.
- Resides in Selangor or Federal Territories (Kuala Lumpur/Putrajaya).

- Works in the sales/business-related field with a monthly income of between RM1,000-5,000 or currently enjoying his retirement. The local birder is a graduate.
- A beginner in birding (can identify 30-100 bird species without fieldguides) or moderately experienced (100 species and above).
- Has invested in birding/bird publications but placed higher investment on optics (i.e. binoculars, telescopes, tripods and cameras).
- Looks forward to undertake trips for several birding days per month and birding holidays several times annually.
- Willing to spend below RM200 for day and overnight trips.
- Appreciates the availability of 24-hour electricity and a ceiling fan for their accommodation.
- *Suara Enggang*, a bi-monthly bird bulletin by the MNS-Bird Conservation Council, will be consulted generally when scouting for sites to bird. Recommendations from birding friends and information from birding e-groups will also assist him in making a decision.
- Looking at a specific birding site, he will consider the number of species, endemics and rarities and pleasant natural surroundings as his key selection criteria.
- Most of his birding sites are in Pahang and Selangor. Some of the key sites visited are Fraser's Hill, Taman Negara (Kuala Tahan area) and Kuala Selangor Nature Park. However, he has also a range of other birding sites that he will visit.
- While birding, he will most likely use fieldguides by Robson and/or Jeyarajasingam & Pearson.
- He will not engage a birding guide preferring the challenge of 'chasing' the birds himself.
- He is also very concerned about the environment and conservation of birds and its habitat and wants a balance of development and conservation.
- He is frustrated with poor maintenance and lack of onsite information at some key birding sites.

Additionally, nine birding sites (5 in Peninsular Malaysia, 2 each in Sabah and Sarawak respectively) were also selected for site assessment to capture critical lessons on their success or shortcomings as a existing/potential birding site. Potential Pilot Sites (for Phase 2) were selected from this pool of candidate sites. The results of this assessment also assisted in the SWOT analysis of Malaysia as a birding destination.

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Malaysia's* avifaunal uniqueness i.e. endemics (and "near-endemics"), charismatic species, rarities, globally threatened and near-threatened species is the country's greatest strength. • Malaysia is politically stable, thus providing a very safe birding environment. • The country has a few international quality birding sites with established reputation amongst the birding (local and foreign) community. • Most birding sites generally have good infrastructures and facilities. Some sites have 'birder-friendly' practices infused in the infrastructures/facilities, thus giving birders an unforgettable experience. • Relatively good accessibility to birding sites 	<ul style="list-style-type: none"> • Higher avifaunal uniqueness from regional countries such as Thailand and India. • Accessibility limited (or none) to certain (potential) birding sites especially those in more remote areas. • Lack of maintenance culture evident in the conditions of existing infrastructure and/or facilities at some birding sites. • Inability of tourism agencies and local travel/tour companies and agents to provide accurate, specific and reliable information on Malaysian birds and birding options and opportunities. • Lack (or limited) marketing and promotional activities on birding in Malaysia. • Lack of local competent and trained birding guides in Malaysia. Similarly, there is a low awareness of Malaysian avifauna

<ul style="list-style-type: none"> • Information on birds and birding in Malaysia can be reliably obtained from several sources e.g. birding e-groups, publications, websites • Possess good and experienced in-country expertise to train interested guides for birding. • Experienced and capable in-country expertise in birding tourism/nature tourism. • Most of Malaysia's key birding sites are entirely or part of protected areas. • Good supporting attractions and/or activities near or at some birding sites. 	<ul style="list-style-type: none"> • and birding in tourism industry personnel across all levels. • Lack of birding-related materials on Malaysia in the market.
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OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Malaysia offers year long birding opportunities without any pronounced seasonality. • Possess untapped birding tourism potential at several high-value birding sites. • Opportunity to cultivate affluent East Asian markets. • A wide range of interpretative materials on Malaysian birds and birding can be developed. • Opportunity to develop and expand birding-related materials on Malaysia. • Identify and develop marketing and promotional strategies on birding tourism in Malaysia. • Improve the maintenance of infrastructures and facilities. • Develop and conduct training programmes to build capacity of local birding/nature guides. • Opportunity to infuse conservation measures into birding tourism in Malaysia to build local stakeholdership and improve its standing in bird conservation. • Build knowledge of local bird distributions and conservation issues for positive actions in Malaysia. 	<ul style="list-style-type: none"> • Continued habitat loss and alteration may jeopardise existing birding sites and destroy potential ones. • Unchecked poaching or legalised hunting will impact the bird community greatly, thus eliminating Malaysia's greatest strength in birding tourism. • Large outbreaks of wildlife-related diseases may impact birding tourism (and all types of tourism) regionally. • Over-utilisation and 'fixed' dependency of certain birding sites may create environmental and social impacts.

Malaysia's competitive advantage as a birding destination

- Politically stable compared to some neighbouring destination countries with some of the same avifauna.
- Good selection of birds, from endemics to charismatic species.

- Malaysia is in the same or similar time zones to Australia, Taiwan, Japan, and much of China, with flight times not too arduous, and is therefore an attractive tropical birding destination.
- Relatively good site accessibility with network of roads and cheap local air travel.
- Generally good infrastructure.
- Much of Malaysia still unknown to overseas birders with untapped potential of new birding sites in States such as Perak, Terengganu and Sarawak.
- Potential of new markets such as Japan, Taiwan, Singapore, Australia have not been fully tapped. Independent and opportunistic birders (e.g. those not on birding tours, backpackers) and digiscopers have not been given adequate attention.
- Attractive supporting attractions such as the tropical rainforest environment, wildlife, natural formations etc.

Recommendations

Birding tourism is not mass tourism, therefore development plans should be based on aiming for:

- a steady and continuous increase of local birders and subsequent increase of information,
- a steady increase of overseas arrivals,
- matched by a steady and continuous increase in the number of competent birding guides, and
- improvement of sites with birders in mind.

Product development

Birding sites

The development of a birding site according to 'birder-friendly' concepts will enhance the birding value of the site and experience of the visitors. Two main areas of development will require attention and long-term commitments (financial and human resources) from the stakeholders.

- (i) *Onsite avifaunal information (site-specific bird checklist, site brochure and/or trail map, news whiteboard, information desk, birding walks)*
- (ii) *Birding infrastructure development and enhancement [network of trails, signages, information boards (containing bird/bird-related information), hides, boardwalks, watching towers, canopy walkway, interpretative centre].*

The information offered/available to birders must be updated regularly. Accuracy of the information on print and signages is equally important. As for physical birding structures, due consideration should be given to the thought on how best to infuse the infrastructures into their natural surroundings without causing too much damage. The design of such infrastructures can be minimal so as not to incur unnecessary prohibitive cost.

Birding routes

A birding route will enable birder(s) to plan of how to travel from one good birding site to another, how many days to stay at a site, what to do while there, what birds (and other attractions) can be seen, where to stay and who to contact.

It would be advantages to Malaysia to develop other birding sites up to international standards and incorporate them into a network of birding route. This will enable Malaysia to remain competitive in the birding tourism industry and not to be overly reliant on existing birding route.

Marketing and promotions

In marketing and promoting Malaysian birding tourism, it is important to remember Malaysian avifauna is her main product. Strong emphasis should be placed endemic birds, charismatic species, unique Asian bird families and the overall bird diversity. Safety and accessibility to the birding site and to reach the bird within that site are additional strong factors.

In order to firmly establish Malaysia as destination especially amongst foreign birders, a wide variety of marketing and promotion needs to be employed. These include website development, printed materials, trade shows/fairs, advertising in popular magazines and familiarization trips for overseas birding tour companies.

Human resources

Developing human resources to support birding tourism in Malaysia requires continuous commitment and support from various stakeholders. Three main groups that require attention were identified, the tourism frontliners, onsite staffs and local nature/birding guides. Capacity-building these groups are a long-term investment and may require reinforcements from time to time.

Selection of Pilot Sites for Phase 2

Nine candidate Pilot Sites were investigated; five in Peninsular Malaysia [Kuala Selangor Nature Park, Royal Belum State Park, Fraser's Hill, Taman Negara National Park (Kuala Tahan area), Endau-Rompin State Park), two in Sarawak (Bako-Buntal Bay, Mulu National Park) and two in Sabah (Kinabalu Park, Danum Valley).

Based on site evaluations conducted on these candidates and feedback from the site stakeholders dialogue, three sites below were chosen as Pilot Sites for Phase 2 of the project. Apart from their avifaunal uniqueness and other strengths, the selected Pilot Sites also reflected the current different stages of its birding tourism development.

Benchmark Site
DANUM VALLEY (SABAH) – Danum Rainforest Lodge
Medium (well known, but needs to become birder friendly)
FRASER'S HILL (PAHANG/SELANGOR)
Undeveloped as a birding site
ROYAL BELUM STATE PARK (PERAK)

Danum Valley, particularly the Danum Valley Rainforest Lodge, is the place that is closest to already being a model site, and any study group from other potential birding sites could learn much from their management, staff, guides, facilities and information dissemination. Danum Valley, with so much to offer, became the obvious choice for the top model site. In addition, the management is anxious to make the place even more birder friendly and is keen to have knowledgeable help to do so.

Royal Belum State Park needs more work done to pinpoint the best birds and where they can best be seen. It does not yet have much in the line of facilities and accommodation, but

these issues are already being addressed by the Perak State Park Corporation and a corporate entity. In Royal Belum, there is an excellent chance that another area of birder popularity can be added to the birding route in Malaysia, and international visitors who have "done" Malaysia in the past can be enticed back by the idea of a brand new birding site.

Phase 2 of this project could make a difference to the speed with which Royal Belum becomes recognised as a "must see" in the birding world. It also provides an opportunity to introduce the "birder friendly" concept to the park and the new accommodation right from the beginning, a process which would be an excellent basis for others coming to a Pilot Site to learn how to do something similar.

Fraser's Hill has the advantage of being very centrally located for a Pilot Site, easily accessible from Kuala Lumpur, Selangor, Perak and Pahang. In addition, as the site does not want to aim for high development density and entertainment centres (such as Cameron's or Genting Highlands), birding is considered essential to its future economic health. Eleven million ringgit is being injected into the area for rehabilitation, and some new facilities already under consideration.

Conclusion

Malaysia, as a birding destination, has much to offer to both overseas and Malaysian birders. Although she faces stiff competition from other countries that support more bird diversity, endemics and charismatic species in the Asian region, Malaysia still has potential birding tourism products and sites to offer. Many birding sites within the country are still unknown to overseas birders and remain untapped.

However, it is clear that awareness and information of what area has to offer birders (primarily overseas) is still relatively low and would require more investment in information disseminating activities, accessibility and infrastructure development, capacity-building human resources and marketing and promotions to maintain and further enhance itself as the premier birding destination in the South-east Asian region.

Unlike the nature of mass tourism, the fruits of current investment (in this project) will not be visible within a short period of time but rather to prepare and consolidate the foundation of the birding tourism in this country. The development of this industry must be carefully chartered, implemented, monitored and reviewed periodically. Equally important is the sustainability of the current investment and conservation and protection of existing and potential birding sites. Active participation and cooperation between all stakeholders are also key ingredients in ensuring success.

With the right investment and implementation, the birding tourism in Malaysia will be poised to deliver benefits to the national and local economies, local communities and conservation of sites and the very resource it depends on, our Malaysian birds.