

# Bird and Nature Tourism in Australia

KBAs in Danger Case Study Report 2022

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# Acknowledgement of Country

BirdLife Australia acknowledges the Traditional Owners of the Country on which we live and work, and we pay our respects to their Elders past and present. We recognise and are grateful for the immense contribution of Indigenous people to the knowledge and conservation of Australia's birds.

## Acknowledgements

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Nature-based and bird-focused tourism continues to attract interest from domestic and international tourists and while it is still relatively small compared to some other jurisdictions, it is a fast-growing niche tourism market in Australia (Steven et al. 2015a, b). A small proportion of tourists are specifically focused on the avifauna of their travel destinations. However, avitourists are not a homogenous group (Steven et al. 2021), with many domestic and international tourists incorporating birdwatching into an itinerary that includes other general nature-based activities and cultural experiences. In Australia, this may include, but is not limited to: taking tours offering insights into Indigenous Peoples' culture and history; participating in whale watching or other marine megafauna tours; visiting regions that exhibit exemplary landscape or seascape features (e.g. geomorphological sites of interest, rainforests, coral reefs); or enjoying the high quality of food and wine offerings in many parts of Australia (Kim et al. 2010; Steven et al. unpublished data [collected at UK Birdfair 2015]).

Further research examining the trends and economic potential of domestic-tourism responses to vagrant birds shows that there is indeed a niche tourism market here in Australia for birders driven to see rarities outside their natural range (Callaghan et al. 2018). However, while these random events can and do bring about a brief economic boost and interest in regional communities, their unpredictability precludes building any kind of sustained destination marketing profile. As such, any destination seeking to utilise birdwatching as a key product offering is best to emphasise the broader birdwatching and nature experience, not merely a focus on vagrants.

The Covid-19 pandemic has disrupted international travel and domestic travel to a lesser, but still significant, extent. Australia's international border closed to overseas tourists in March 2020, with a return to pre-pandemic travel conditions unlikely until after 2022. Since the beginning of the Covid-19 pandemic, Australia's tourism market (both domestic and international) has experienced total losses estimated at \$101.7 billion, including \$51.3 billion in international arrivals alone (TRA 2021). For the year ending June 2021, domestic trips fell by 23%, with a corresponding reduction in spend of 21%, with capital cities the hardest hit. Although interstate border closures continue to affect our ability to travel domestically, many regional centres have seen a surge in bookings and trips, at least in areas not experiencing lockdowns. With this in mind, now is an optimal time to maximise the interest in domestic tourism, with many travellers likely to hold off on resuming international travel for some time yet, due to ongoing concerns about transmission of Covid-19. A large proportion of the demographic that are attracted to nature-based tourism offerings are also in the age group most vulnerable to serious complications arising from Covid-19. We could expect this sector to enjoy sustained investment among this group in the next several years.

In contrast to many of our movements having ground to a halt, general threats to biodiversity have persisted to put birds and their habitats at risk. Australia's natural values continue to face key habitat loss and degradation threats in some of our most important bird habitats and biodiversity hotspots. BirdLife Australia conducts ongoing campaigns, advocating for careful management of several Key Biodiversity Areas (KBAs) across the country, which are in landscapes particularly contested by other potentially damaging industries. These KBAs, termed 'KBAs In Danger' are: Bruny Island; Moreton Bay and Pumicestone Passage; Ulladulla to Merimbula; and Christmas Island. Research has revealed Australia's KBA network – which has grown from the Important Bird Area network – plays a critical role in the birdwatching tourism sector in Australia (Steven et al. 2015a). As such,

these KBAs make ideal case studies for examining the potential of bird and nature tourism with an intention to engage the local community with their exceptional environment and to support local economies that incorporate sustainable and resilient bird and nature tourism.

This report provides an in-depth analysis of these four KBAs, describing the attributes that make them appealing as peak nature-based tourism destinations, the track record they have enjoyed as tourism destinations more generally and the potential benefits to the broader community if nature-based tourism is actively supported and promoted in lieu of environmentally degrading economic activities. This latter point will draw on data we have collected this year from *BirdLife Australia* supporters, specifically asking them for their experiences and preferences regarding travel across these KBAs.

The report is presented in the following sections:

- Birdwatching and nature-based tourism in Australia – A summary of the data from the Australian Government’s Tourism Research Australia body and a targeted survey of *BirdLife Australia* members and supporters exploring their travel experiences (N = 2576)
- Case Study Collection
  - Ecological and tourism infrastructure and destination profiles of the four KBAs
  - Results of a targeted survey of *BirdLife Australia* members and supporters exploring their travel experiences specific to the four KBAs
- Practical recommendations are presented via a SWOT (strengths, weaknesses, opportunities, threats) analysis for each case study providing *BirdLife Australia*, government and non-government partners a blueprint for elevating the awareness of these KBAs as viable and sustainable destinations for domestic and international tourism.

## General birdwatching trends in Australia

Australia provides a unique combination of birdwatching tourism opportunities that make it an ideal and sought after destination among international markets (Steven 2015). Firstly, we enjoy some of the highest rates of endemism combined with species richness and habitat diversity relative to other continents, with much of our avifauna relatively secure from hunting and therefore more confiding for the observer. From rainforests to deserts and shorelines to alpine settings, the Australian natural environment can deliver the most fruitful birding experience any travelling birdwatcher could ask for. Secondly, given the advanced development of our tourist market and related infrastructure, visitors can expect to have access to an array of accommodation options, food and beverage providers and accessible transport networks.

Finally, Australia, when compared to many other highly prized birding destinations, is among the safest places a birdwatcher could choose to visit. Where many other equatorial countries offering tropical bird-seeking

experiences may pose, at least, a perceived risk to Anglophone and Asian birdwatchers, Australia’s Wet Tropics and Top End are often viewed as a safer alternative. For example, despite Papua New Guinea attracting a good number of bird of tourists chasing birds of paradise each year there continues to be significant hesitation for many given the persistent threat of crime enacted on tourists and expatriates (Steven 2015). As such, it is almost a total necessity to engage the services of an experienced and well-respected tour guide. Birdwatchers visiting Australia can safely travel independently, under their own terms and at their own pace, secure in the knowledge their personal safety and property (i.e. cameras and optics) are less likely to be compromised. Importantly, in a post-Covid-19 world, the potential to enhance development of the domestic tourism market is significant, with growth in caravanning tourism set to continue, helped in no small part by an ageing, and hence retiring, population (Caravan Industry Association of Australia 2016).

## Nature-based Tourism in Australia Visitor Survey Data from Tourism Research Australia

The National Visitor Survey (NVS) is conducted by Tourism Research Australia, the Commonwealth government-based research body that monitors tourism trends and statistics to guide the development of the tourism sector throughout the country. The NVS surveys the domestic population annually, with a total annual sample size of 120,000 people 15 years old and over. Participants comprise a random selection of mobile phone numbers (2019 onwards). The specifics regarding methodology and limitations of the NVS can be viewed at <https://www.tra.gov.au/Domestic/national-visitor-survey-methodology>

Data presented here are relevant for the last period of travel under normal circumstances (i.e. before Covid-19 related restrictions) (TRA 2021). It should also be

noted that ‘birdwatching’ was added to the list of potential nature and outdoor activities in the survey from 2019 onwards, after persistent calls from the birdwatching tourism sector to include it in the survey. Unlike existing activities, such as whale watching, which generally takes place from ticketed commercial marine vessels, birdwatching activities are very difficult to quantify given the high proportion of people who engage in birdwatching independent of tour operators and guides. All results quoted from the survey are extrapolated data, based on the sample providing a statistically representative sample of the Australian population (TRA 2021).

It should also be noted when viewing these data that economic benefits have been received with negligible government

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**Table 1:** Domestic National Visitor Survey\* Activities 2019

Daytrips				Overnight Trips			
Activities	Visitors (000s)	Expenditure (AUD)	Average Spend/Trip (AUD)	Visitors (000s)	Expenditure (AUD)	Average Spend/Trip (AUD)	Average Spend/Night (AUD)
Birdwatching	516	\$46M	\$89	331	\$237M	\$717	\$181
Visit national parks/state parks	16,321	\$1487M	\$91	14,173	\$10,171M	\$718	\$180
Bushwalking/rainforest walks	14,013	\$1355M	\$97	14,218	\$9,362M	\$658	\$172
All Outdoor and Nature	58,499	\$5661M	\$97	45,621	\$30,345M	\$665	\$173
All activities (not all shown here)	248,349	\$26,338M	\$106	117,448	\$71,903M	N/A	N/A

\*Source: Tourism Research Australia 2021

**Table 2:** Domestic National Visitor Survey\* Birdwatching Overnight Trips 2019/20 Average Visitors

State	Average number of visitors 2019/20
New South Wales	93,000
Queensland	70,000
Victoria	48,000
South Australia	35,000
Western Australia	33,000
Tasmania	7,000
Northern Territory	16,000
<b>TOTAL</b>	<b>302,000</b>

\*Source: Tourism Research Australia 2021

**Table 3:** Domestic National Visitor Survey\* - Visitors# by regions relevant for case study KBAs Year ending 2019

Region	Total Daytrips (000s)	Holiday Daytrips (000s)	Total Overnight (000s)	Overnight Holiday (000s)	Average Nights / Trip
New South Wales South Coast	7,418	4,124	4,450	2,367	3.1
Brisbane/Gold Coast/Sunshine Coast	18724 /8,307 /7,028	7,700 /4,362 /3,395	7656 /4,172 /3,982	2,173 /2,26 /5/2,179	2.9 /3.9 /3.5
Hobart and Southern Tasmania	2,798	1,523	1,744	981	3.6

\*Source: Tourism Research Australia 2021 #All visitors - not limited to birdwatching

support for marketing of birdwatching as a specific tourism activity to domestic and overseas markets. Investment in the sector and elevating its profile among tourism campaigns could yield significant benefits to the Australian economy, especially in regional destinations where the bulk of intact bird habitats are found.

The following tables present birdwatching visitor data for daytrip and overnight trips, compared to other nature and outdoor activities (Table 1). Birdwatching data are then shown by state (Table 2) and region relevant for the case study KBAs (Table 3).

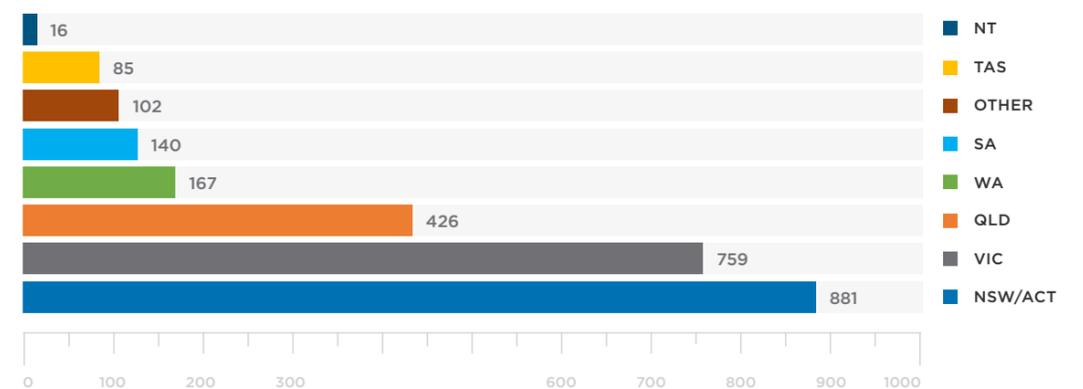
## Birdwatching and nature-based tourism in Australia Results from member and supporter survey

BirdLife Australia conducted an online questionnaire survey of its members and supporters in October 2021, asking them to provide information about their birdwatching travel preferences and history (Appendix A - BirdLife Australia Nature-based Tourism Survey). Of the 2803 people who responded to the survey, a total of 2576 (92%) responses could be used in further analyses (i.e. 227 respondents clicked on the survey link and may have provided an email address but did not answer any of the bird-related survey questions). Of the completed questions, Australian postcodes were provided for 2474 (88%) respondents, with 102 respondents either not providing a postcode or responding from outside Australia. Most respondents came from New South Wales (and Australian Capital Territory) (NSW) (881 respondents), followed by Victoria (Vic) (759 respondents) (Fig. 1). These two states combined represent 67% of the sample, which is somewhat proportionate to those states' populations relative to the Australian population.

The majority of respondents described themselves as either intermediate (43%) or casual (40%) in terms of birdwatcher self-classification, with fewer considering themselves to be 'keen birders' (14%) (Fig. 2). However, despite not many describing themselves as 'keen birders', more than 80% indicated that they incorporate birding and/or nature appreciation into their travel in Australia either always (45%) or usually (39%) (Fig. 3). Many also stated that this was either never (51%) or rarely (31%) in the company of a paid guide (Fig. 4), indicating that the vast majority of bird and nature tourism among the domestic market happens independently. This further illustrates the need to include birdwatching on the NVS, as it is potentially the most accurate way to gauge participation and thus economic importance of providing bird based tourism opportunities (i.e. conserved habitat) for this to occur.

A huge proportion of bird and nature travel occurs in the absence of children in the

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**Figure 1.** Breakdown of survey sample by state of residence (N = 2576)

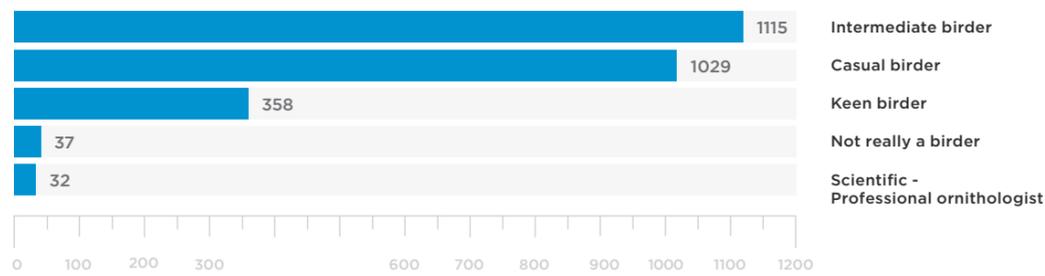


Figure 2. Self-classification of birder type (N = 2571)

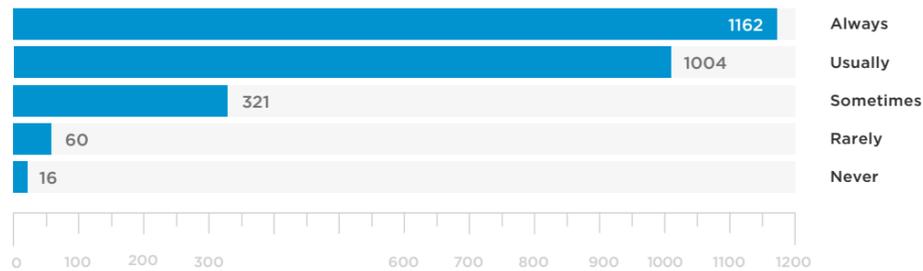


Figure 3. How often do you incorporate birding and/or nature appreciation into your travel in Australia? (N = 2563)

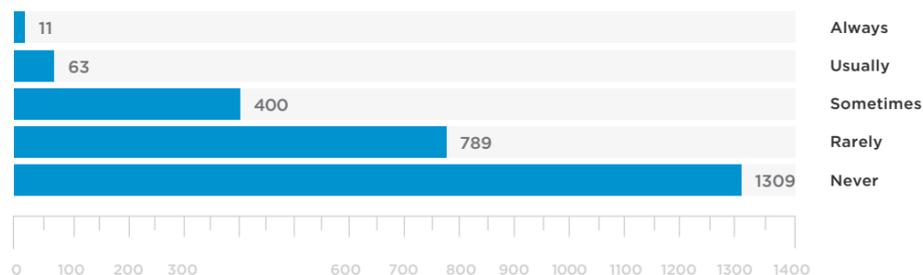


Figure 4. When you incorporate birding into your travel, how often do you engage a paid guide? (N = 2572)

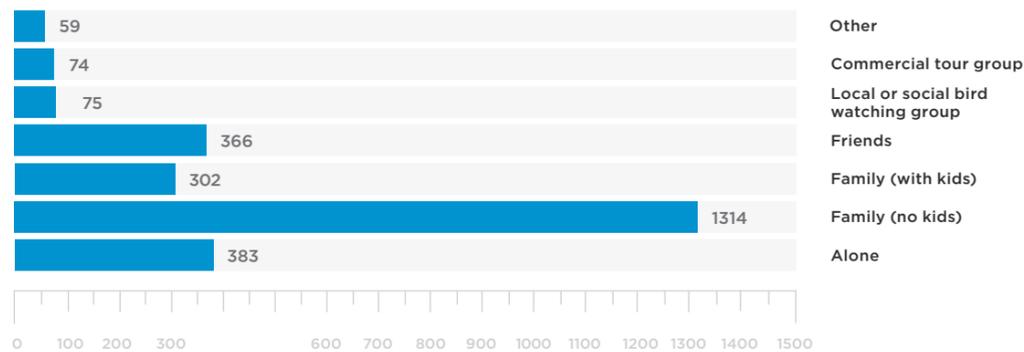


Figure 5. When birding and/or nature viewing (e.g. wildlife sanctuaries, national parks, nature reserves) is a key part of your travel, please choose an option that best describes your travel party (N = 2573)

travel party (80% of respondents), with 1314 respondents (51%) stating their travel party during bird and nature trips comprised family (no kids), followed by 15% travelling alone and 14% travelling with friends (Fig. 5).

Many respondents take regular day trips that incorporate birding, with 38% stating they undertake at least 10 daytrips per year and a further 22% take between five and ten daytrips per year. A little over a quarter of respondents (27%) indicated they take between two and five birding day trips per year (Fig. 6). While daytrips may not generate accommodation related revenue for local economies, many local food and beverage outlets as well as retail and visitor information centres (which are often a source of income for local artisanal cooperatives) do derive benefit from the daytrip market. These birding patrons can also do a lot to raise the profile of birding as an attraction in peri-urban communities, fostering greater pride in the local environment among these communities which may otherwise be unaware of the value of conserving local bird habitats and populations.

Overnight trips that involve birding are very popular, with more than 92% of respondents taking at least one overnight trip per year (Fig. 7). Among this 92%, the ratios were fairly evenly split between those who take one, two, three or at least four trips per year (20%-28%).

We also asked respondents how much they budgeted per day for overnight trips. We asked this in terms of all-inclusive (e.g. guiding, transport, entry fees/levies, accommodation, food and beverage), and non-inclusive trips (e.g. entry fees for parks/reserves, souvenirs, gratuities at parks/reserves). For all-inclusive, almost half of the respondents (46%, 1122 respondents) spent \$200 or less per day on these package experiences (Fig. 8). This was the largest category and is in line with how much bird and nature tours would equate to in terms of daily cost. A further 27% spent \$200-\$250 per day and 22% spent \$250-\$500. A small proportion indicated they budgeted at least \$500 per day. We would speculate these are not packages that are for groups, but rather one on one experiences with a specialist bird guide.

For non-inclusive trips, respondents were asked about tourist related expenses accommodation and food and beverage separately. Most respondents selected options indicating their daily spend on tourist related expenses (e.g. entry fees for parks/reserves, souvenirs, gratuities at parks/reserves) was less than \$100 per day; 31% spent less than \$30, 35% spent \$30; \$50; and 23% spent \$50-\$100 (Fig. 9). For non-inclusive trips, the daily spend on accommodation tended towards the budget end of the average accommodation costs in Australia, with 29% spending less than \$100

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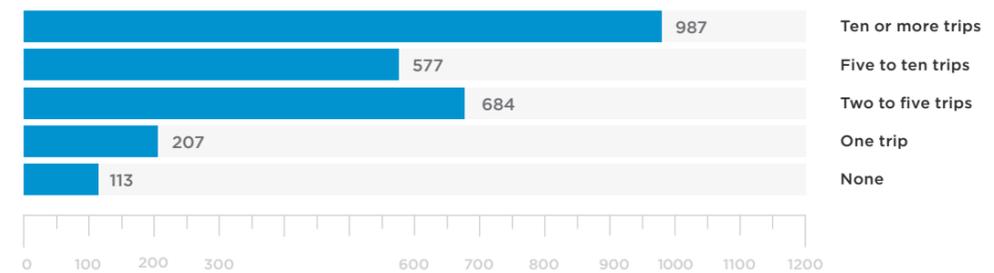
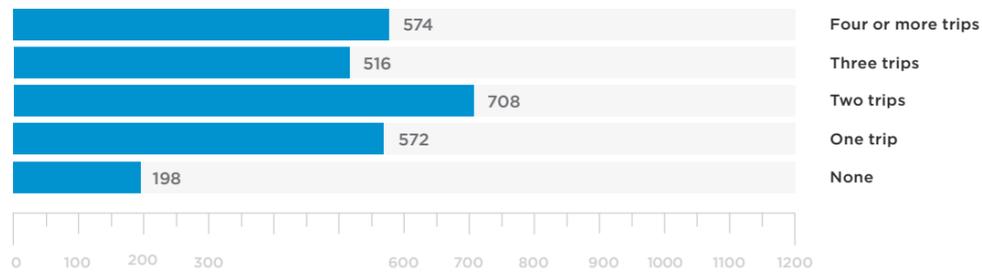


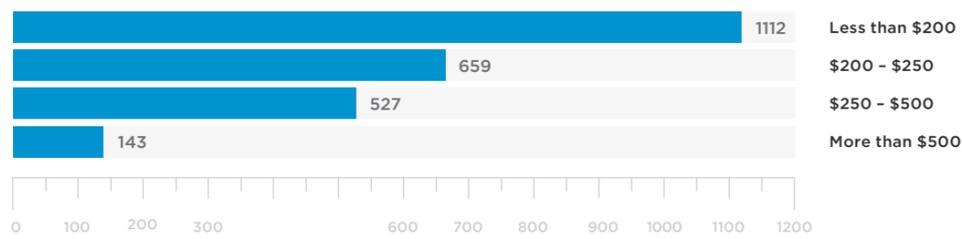
Figure 6. How many daytrips (i.e. less than 100km from home or not requiring overnight accommodation) that involve birding and/or nature viewing in Australia would you normally take in a year (excluding zoos)? (N = 2568)

National data reveals that birdwatching tourists spend more than other types of tourists in Australia and with dedicated marketing and investment the birdwatching tourism market has huge potential to grow.

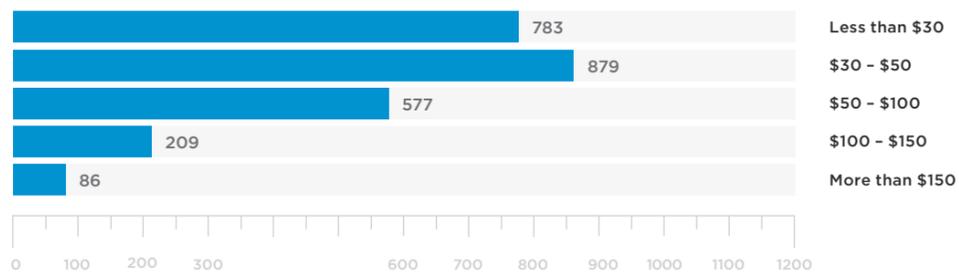




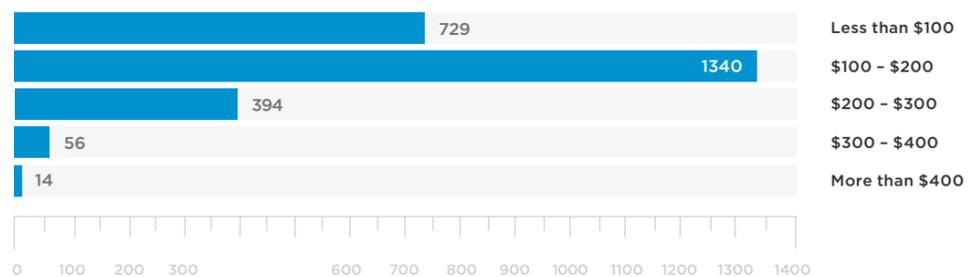
**Figure 7.** How many trips (requiring overnight accommodation) that involve birding and/or nature viewing in Australia (or its territories) would you normally take in a year (excluding zoos)? (N = 2568)



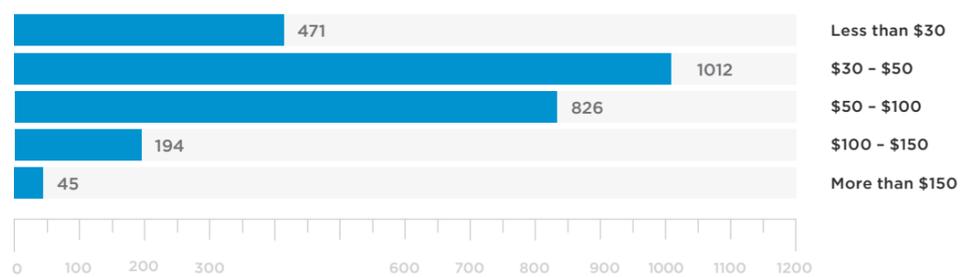
**Figure 8.** For trips that are all-inclusive (guiding, transport, entry fees/levies, accommodation, food and beverage), please indicate how much do you budget per day (N = 2451)



**Figure 9.** For trips that are NOT all-inclusive, please indicate how much you spend on tourist related expenses (e.g. entry fees for parks/reserves, souvenirs, gratuities at parks/reserves) (N = 2534)



**Figure 10.** For trips that are NOT all-inclusive tours, please indicate how much you spend per night on accommodation (N = 2533)

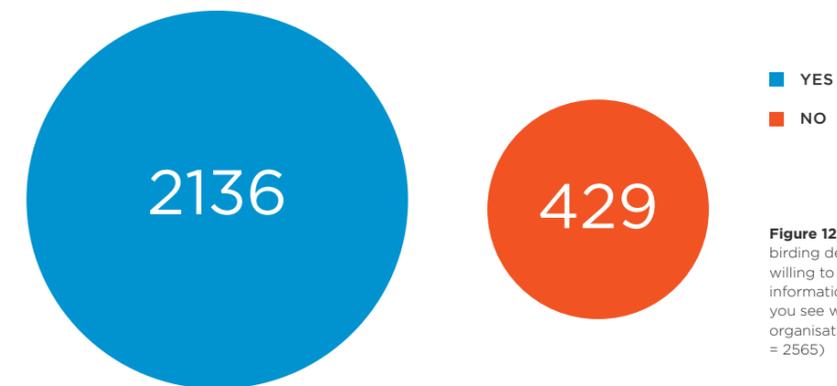


**Figure 11.** For trips that are NOT all-inclusive tours, please indicate how much you spend per day on food and beverage (N = 2548)

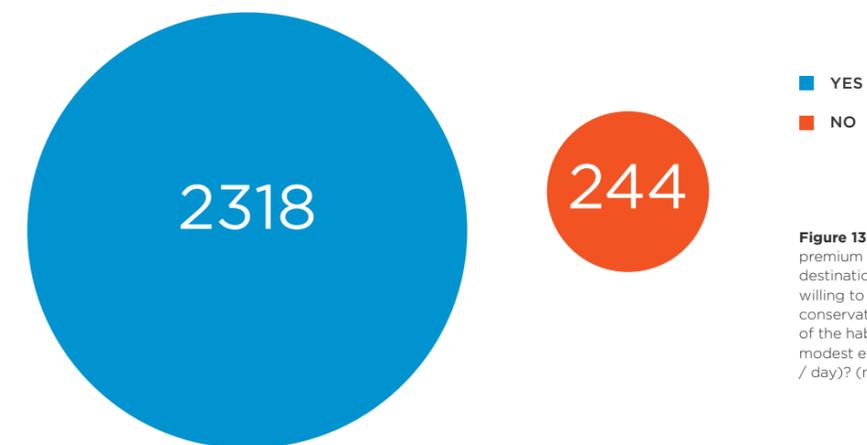
per night and 53% spending \$100-\$200 per night on accommodation (Fig. 10). Food and beverage costs attracted greater expenditure than other tourist-related expenses, with almost three quarters of respondents selecting the categories of daily spend \$30-\$100 per day (40% spent \$30-\$50/day and 32% spent \$50-\$100/day) (Fig. 11).

Birders are often described as among the most environmentally aware ecotourists, with an extraordinary ability to contribute to sustainable development and citizen science (Steven et al. 2013; Steven et al. 2017; Callaghan et al. 2021; Fuller et al. 2021). BirdLife Australia also promotes ethical birdwatching with an organisational [BirdLife](#)

[Australia Ethical Birdwatching Guidelines](#) available on its website. Our survey results provide evidence of the willingness of our supporters and members to contribute to both citizen science (83%) during their travel (Fig. 12) and provide financial support through entry fees to access key birding sites (90%) (Fig. 13). The realisation of both of these outcomes (which are key tenets of the ecotourism model) requires the development and implementation of the mechanisms and infrastructure to facilitate them. This inevitably would fall to the tourism operators and personnel at key sites as well as protected area agencies. This may or may not be possible in certain Australian states where payment for entry to state managed



**Figure 12.** When you visit birding destinations, are you willing to capture and share information about the birds you see with a conservation organisation (i.e. Birddata)? (n = 2565)



**Figure 13.** When you visit premium birding and nature destinations, would you be willing to contribute to the conservation and management of the habitat in the form of a modest entry fee/levy (\$2-\$20 / day)? (n = 2562)

# Case Study Collection: KBAs in Danger bird and nature-based tourism profiles

The Ulladulla to Merimbula KBA was the most visited among the questionnaire respondents (1794 respondents), followed by Bruny Island (980 respondents), Moreton Bay and Pumicestone Passage (930 respondents) and lastly Christmas Island (148 respondents) (Fig. 14). Given the logistical undertaking and cost associated, it is not surprising that Christmas Island was the least visited KBA among our respondents. However, despite the island closing to visitors for several months in 2020 due to the Covid-19 pandemic, tourism operators stated that since reopening there has been extraordinary demand for travel to the island, as one of, if not the

only, tropical island destination accessible to Western Australian tourists (though not other Australian tourists). The bulk of survey respondents who had been to Christmas Island were from NSW (the most populous state) and WA (the closest state and large capital city). Proximity is also considered a key driver for the main tourist source markets for the Moreton Bay and Pumicestone Passage and Ulladulla to Merimbula KBAs, with Queensland and NSW the two main contributors to tourism in the former, and NSW and Victoria the main source markets for the latter. Similarly, most visitors to Bruny Island reside in the nearby mainland states of NSW and Victoria.

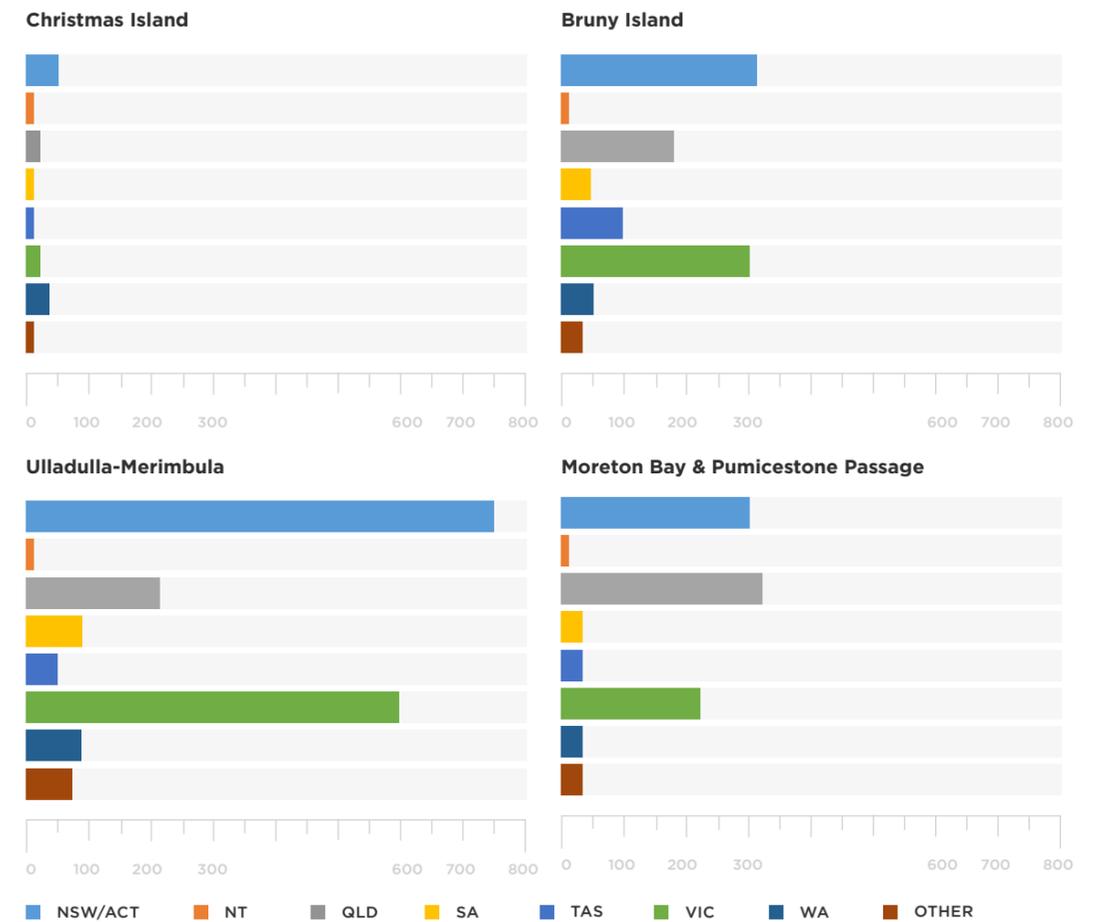


Figure 14. Respondent visitation to the four case-study KBAs by state of residence.

When building a nature tourism destination profile for a specific location, there are myriad attributes that can act as drawcards for tourists including, but not limited to, the condition of the natural environment, quality of hospitality services, public safety and social stability as well as logistical considerations around accessibility and distances to be travelled. In this section, we focus on those attributes likely to be appealing to birdwatching and nature-based tourists, based on the extensive literature describing their travel preferences across the world (Steven et al. 2015b). We also limit the information presented, such as species lists, to those which are likely to be encountered by tourists.

In an effort to under-promise and over-deliver on product offerings as well as keep this document relatively concise,

we omit exhaustive lists of animal species (especially invertebrates, reptiles and some mammals and birds) which are potentially too cryptic to be reliable drawcards for these destinations. Some attributes listed are outside the mapped boundaries of the KBAs, however, but are key to building the importance of the natural values of the KBA to the broader region where the required existing tourism infrastructure and other drawcards exist. Finally, we summarise the information presented in a SWOT Analysis (strengths, weaknesses, opportunities and threats), to provide a constructive feedback framework for tourism proponents and local communities to strategically manage and plan future tourism activities. Strengths and weaknesses represent the internal factors influencing success and sustainability, and opportunities and threats represent the external factors.

## Case Study 1

### Christmas Island KBA

#### Site description and background

Christmas Island is located in the tropical Indian Ocean, 2600 kilometres north-west of Perth (Western Australia), and is governed by the Australian Commonwealth. Despite this, it is geographically much closer to Indonesia, only 360 kilometres from the island of Java. A submerged rocky mountain, with a maximum elevation of 360 metres above sea level, the island has been used as a phosphate mining hub since the late 1800s, but despite the significant land use change and disturbance associated with this, approximately two thirds of the island was designated as national park between 1980 and 1989 (Parks Australia 2021). In addition, in 2008, Christmas Island Immigration Reception and Processing Centre was opened by the Commonwealth government and has been used on and off since its construction (Parks Australia 2021). While both of these activities have attracted concern and criticism about environmental and social ethical standards, they (in addition to other government-employed support workforce) have been the main foundation on which the local economy has been based (DITRDC 2021a).

This oceanic island features steep rocky cliffs and a large plateau of tropical rainforest containing numerous endemic species, many of which are threatened with extinction (Misso and West 2014). This unique geology and biogeography combine to make Christmas Island highly sought after among nature enthusiasts both domestically and internationally, especially for birdwatching (Hall 2011). Christmas Island is home to 23 resident or breeding birds and is the last remaining stronghold for two of the world's rarest seabirds – the Abbott's Booby (Endangered; EPBC Act 1999) and Christmas Island Frigatebird (Critically Endangered; EPBC Act 1999) (BirdLife International 2021a). According to the Christmas Island Tourism Association, tourism represents approximately \$7 million or 10-15% of the gross regional profit for the local economy each year (CITA 2020). In 2019/20, the island welcomed 2,234 tourists with an average spend of \$3,300. It should be noted that Christmas Island was closed to visitors between April and July 2020 (due to Covid-19), which is estimated to have reduced income by approximately \$2 million. Despite this, a large rebound occurred upon reopening of the island, with a surge in visitors bringing 548 holidaying tourists to the island between August and October 2020.

In 2018, the 'Our Christmas Island, Strategic Plan 2030' was published after an extensive consultation period, focusing on the perspectives of the resident population as well as key stakeholders on the Australian mainland (IOT RDO 2018). The development of the plan was led by the Indian Ocean Territories Regional Development Organisation. The findings of this consultation bode well for a future that emphasises the need to conserve the natural values of Christmas Island, especially given the probable move away from mining as the main economic driver on the island (Parks Australia 2021). For example, in a community survey, 139 Christmas Island residents were asked what they love about Christmas Island and 71% said the 'natural environment'. This was the largest response to any attribute, with 'community' and 'peaceful, safe and freedom' the next two most popular responses.



#### ... Christmas Island Tourism

**10-15% of the gross regional profit for the local economy each year (CITA 2020)**

All three of these attributes are also positive drawcards for tourists seeking a holiday that enables a connection to nature and community alike. Key challenges identified to ensuring sustainability on the island were related to better waste management and recycling. Additionally, the plan highlights aspirations among the community and stakeholder groups to increase visitor numbers to 5000 annually. This would effectively double current arrivals and as such requires careful management considerations regarding the island's carrying capacity to support the tourism activities associated with such growth. A strategic assessment is currently being undertaken by the Commonwealth Government with the aim of creating a framework for future land use and development on the island (DITRDC 2021b).

#### Supporter survey results

Our survey revealed similar economic trends to those reported for tourism in general to Christmas Island, at least in terms of average spend per visitor. Of the 148 respondents who had previously visited Christmas Island, 48% did so as part of an all-inclusive guided tour package (66 respondents). All-inclusive tours among our respondents represented investment of between \$190,000-\$292,000 (Fig. 15). Total investment values were calculated based on the number of respondents providing answers to each spending bracket, with an estimation of the minimum and maximum total investment per category. Tourists' average spending range was calculated using the number of respondents and the lower and upper limit of each spending bracket they were presented with (see questions related to trip budgets in [BirdLife Australia Nature-based Tourism Survey](#)). For Christmas Island tourists in our sample, they provided an average spend of up to \$4,113 per tourist, based on the upper limit of each category. For the 65 self-guided tourists in our sample, their costs represented an investment of \$97,000-\$203,000 (Fig. 16) with an average of up to \$3,123 per tourist. Nine tourists who had organised their own trips previously had also booked a guided tour during their visit to Christmas Island.

Almost three quarters (107 respondents) of the surveyed visitors to Christmas Island indicated that establishment or expansion of a large-scale development (e.g. mining) would deter them from booking a trip to this destination in the future. Conversely, the

greatest drawcard attributes that were important to our respondents when visiting Christmas Island were centered on an intact natural environment. Not surprisingly, seeing Christmas Island birds (i.e. endemics) was the biggest factor (89% of previous visitors, 131 respondents), followed by seeing other Christmas Island wildlife (77%, 114 respondents) and the general nature experience (74%, 109 respondents). About 35-40% of respondents also stated that local culture and history, diving and snorkeling and witnessing the red crab migration were also important. Five respondents who had visited Christmas Island stated that visiting a phosphate mining operation was an important part of their visit (3%).

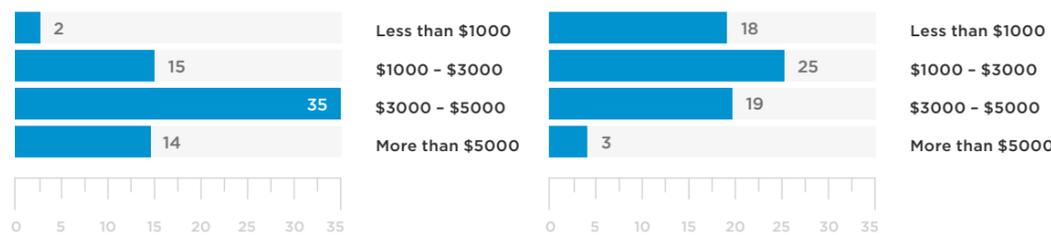


Figure 15. For all-inclusive tours, please indicate how much you budgeted for this trip to Christmas Island

Figure 16. For self-organised trips, please indicate how much you budgeted for this trip to Christmas Island in total

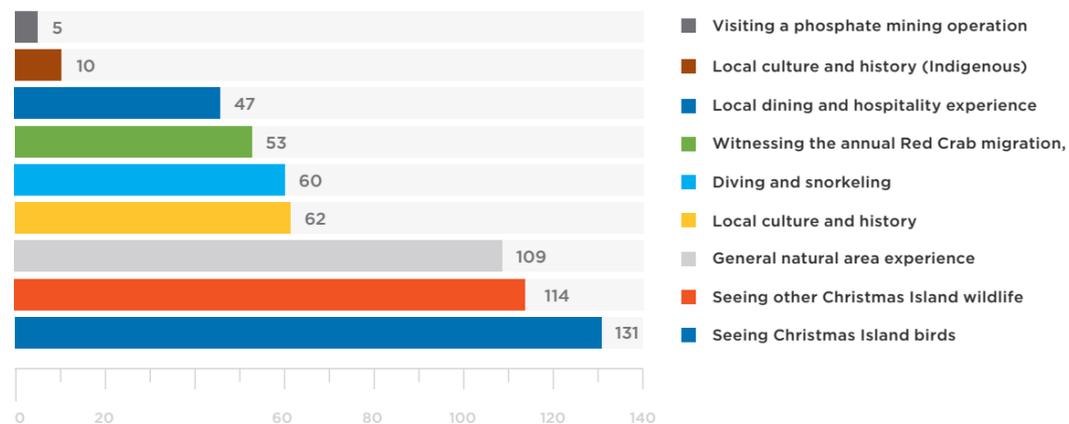


Figure 17. Drawcard destination attributes for previous visitors to Christmas Island (n = 148)

Table 4: Christmas Island KBA Tourism Destination Summary

<b>Climate</b>	Tropical
<b>State</b>	Territory of Christmas Island
<b>Closest airport</b>	Christmas Island International and Domestic Airport
<b>Key habitats for nature-based tourism</b>	Sea cliffs, rocky shores & rocky islets, Rainforest & vine thickets, Closed shrublands & low closed woodlands
<b>Bird species richness</b>	30+
<b>KBA Trigger* and feature species</b>	<p><b>Birds*:</b> Red-tailed Tropicbird, White-tailed Tropicbird, Christmas Island Imperial-Pigeon, Great Frigatebird, Christmas Island Frigatebird, Abbott's Booby, Red-footed Booby, Brown Booby, Christmas Island Boobook, Christmas Island White-eye, multiple species of seabirds</p> <p><b>Other biodiversity:</b> Christmas Island Red Crab, Christmas Island Flying Fox, Coconut Crab, marine turtles, Manta Rays, Whale Shark, Spinner Dolphins, hybrid fish, Christmas Island Blue Crab</p>
<b>Other tourism 'pull factors' for the area (scenery, food and wine, events)</b>	<p><b>Oceanic Tropical Island Destination</b>  <b>Scenic profiles:</b> Geological landscape, tropical rainforest, tropical reef</p> <p><b>Nature-based tourism offerings</b>  <b>Terrestrial:</b> rainforest birdwatching, red crab migration, other wildlife spotting, two Ramsar Wetlands of International Importance, hiking, landscape appreciation mountain biking (pending), weekly Blue-tailed skink tour, Bird Feeding, Hosnie's Spring a perched mangrove (for specialist tours only)</p> <p><b>Coastal:</b> beach-based activities, snorkeling, responsible turtle watching, marine debris collections</p> <p><b>Marine:</b> diving, snorkeling, fishing, pelagic bird tours (marine park status pending)</p> <p><b>Other tourism infrastructure</b>                      Diverse but limited accommodation options, food and beverage options Cultural history (Chinese, Malay, Australian)</p> <p><b>Events</b>                      Bird 'n' Nature Week (September), Sea Week (June), Red Crab Migration (Oct-Jan), Whale Shark Migration (Nov-May), Marine Debris Project/Seaweeek (TBA)</p>
<b>Tour guides, information and specialist accommodation</b>	Richard Baxter - Birding Tours Australia <a href="https://www.birdingtours.com.au/">https://www.birdingtours.com.au/</a> Christmas Island Tourism Website <a href="https://www.christmas.net.au/">https://www.christmas.net.au/</a> Indian Ocean Experiences <a href="https://www.indianoceanexperiences.com.au">https://www.indianoceanexperiences.com.au</a> Specialist accommodation Swell Lodge <a href="https://swelllodge.com/">https://swelllodge.com/</a>
<b>Local BirdLife branch and partner groups</b>	Island Care Christmas Island (limited capacity)

## Christmas Island

**KBA Trigger Bird Species:** Red-tailed Tropicbird, White-tailed Tropicbird, Christmas Island Imperial-Pigeon, Great Frigatebird, Christmas Island Frigatebird, Abbott's Booby, Red-footed Booby, Brown Booby, Christmas Island Boobook, Christmas Island White-eye, multiple species of seabirds



Red-tailed Tropicbird

CHRISTMAS ISLAND TOURISM ASSOCIATION



White-tailed Tropicbird

IAN MONTGOMERY



Red-footed Booby

CHRISTMAS ISLAND TOURISM ASSOCIATION



Christmas Island White-eye

PHILIP CASH



CHRISTMAS ISLAND IMPERIAL-PIGEON

JOHN BARKLA



Great Frigatebird

ANDREW SILCOCKS



Brown Booby

CHRIS BRAY



Christmas Island Frigatebird

CHRIS SURMAN



Abbott's Booby

IAN MONTGOMERY



Christmas Island Boobook

CHRISTMAS ISLAND TOURISM ASSOCIATION

**Other biodiversity:** Christmas Island Red Crab, Christmas Island Flying Fox, Coconut Crab, marine turtles, Manta Rays, Whale Shark, Spinner Dolphins, hybrid fish, Christmas Island Blue Crab

## Case Study 2 Bruny Island KBA

### Site description

Bruny Island is a rocky cool temperate island with huge conservation value, located south-east of Hobart, less than 2 hours' drive and ferry journey by car from the state's capital. The island comprises two separate landforms connected by a sandy isthmus. A short ferry trip from the village of Kettering, it takes just 20 minutes to reach Bruny Island from the Tasmanian mainland. The island is home to Tasmania's 12 endemic species of birds, including the world's largest population of Forty-spotted Pardalotes and regularly supports a significant proportion of the global population of Swift Parrots (Birdlife International 2021b). Bruny Island boasts numerous other nature-oriented attractions, including one of the most reliable places to see Eastern Quolls and a small population of Little Penguins alongside roosting shearwaters. Other drawcards include sought after food and beverage experiences, including gourmet cheese, oysters, wines, whisky and selected dining options.

Despite its longstanding history in forestry, tourism is now a key element of the Bruny Island economy, with a Bruny Island Tourism Strategy published in 2017, outlining a framework for the sustainable enhancement of the industry on the island (Kingborough Council 2017). This is warranted given that the number of visitors to the island has steadily increased to about 150,000 visitors to Bruny Island per year (Tourism Tasmania 2021); it dropped to 50,000, during the Covid-19 pandemic (March 2020-March 2021) but experienced a recovery to 99,000 for the year ending September 2021 (Tourism Tasmania 2021). All indications are the rates of visitation will return to pre-pandemic numbers quickly upon lifting of Covid-19 related travel restrictions.

In recognition of the growth in tourism, the Bruny Island Tourism Strategy aims to guide this enhancement, based on the capacity of the island's infrastructure, the need to manage and mitigate impacts on the natural environment and manage the needs and expectations of residents (813 in the 2016 census) and visitors alike. Currently, the ferries transport approximately 120,000 vehicles to Bruny Island per year. As many as two thirds of the dwellings on Bruny Island are holiday homes that are not occupied permanently. This illustrates the popularity of the site not just for domestic tourists travelling from interstate, but also a large community of 'weekenders' visiting the island from Hobart and other urban centres within Tasmania, especially in summer. Despite the growth in tourism on Bruny Island, the resident population has previously expressed concerns about the ability of the island's infrastructure to support this growth (e.g. roads, communications, waste management and emergency response processes) (Kingborough Council 2017). Just as investment in infrastructure can manage impacts on the natural environment, it can also foster greater support and positive perceptions towards tourists among the residents living on the island.



**150,000 visitors to Bruny Island per year**  
(Tourism Tasmania 2021)

### Supporter survey results

Of the 980 respondents who had previously visited Bruny Island, 14% did so as part of an all-inclusive guided tour package (138 respondents). All-inclusive tours represented investment of \$50,500-\$112,500 (Fig. 18) with an average spend of up to \$815 per tourist (see Christmas Island case study for explanation of how these values are calculated). For the 810 self-guided tourists in our sample, their costs represented an investment of \$205,500-\$585,500 (Fig. 19) and an average spend of up to \$723 per tourist. Eighty-three tourists who had organised their own trips previously also booked a guided tour during their visit to Bruny Island.

The vast majority (83%) of the surveyed visitors to Bruny Island indicated that establishment or expansion of a large-scale development (e.g. timber logging or a timber mill) would deter them from booking a trip to this destination in the future. This conforms to a similar proportion, of the (816 respondents) indicating that seeing a pristine and intact environment was important to them when choosing to travel to Bruny Island. Additionally, more than 80% of respondents also identified seeing Bruny Island birds (810 respondents) and seeing other Bruny Island wildlife (803 respondents) as important attributes of this destination. Almost half of the respondents indicated that the local Indigenous culture and history were important drawcards (n = 446, 46%) as well as the local food, dining and hospitality offerings (379 respondents, 39%). In contrast, only 14 respondents felt visiting a timber mill was an important part of their visit (1% of the sample).

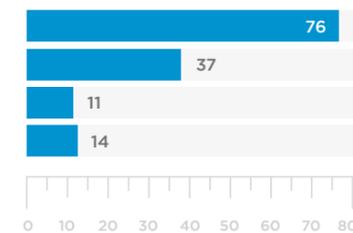


Figure 18. For all-inclusive tours, please indicate how much you budgeted for this trip to Bruny Island

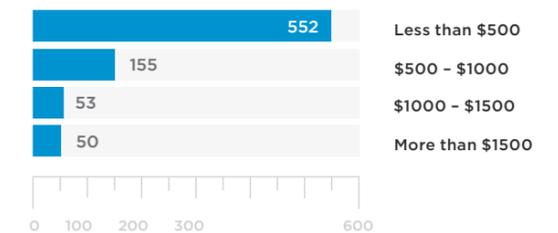


Figure 19. For self-organised trips, please indicate how much you budgeted for this trip to Bruny Island in total

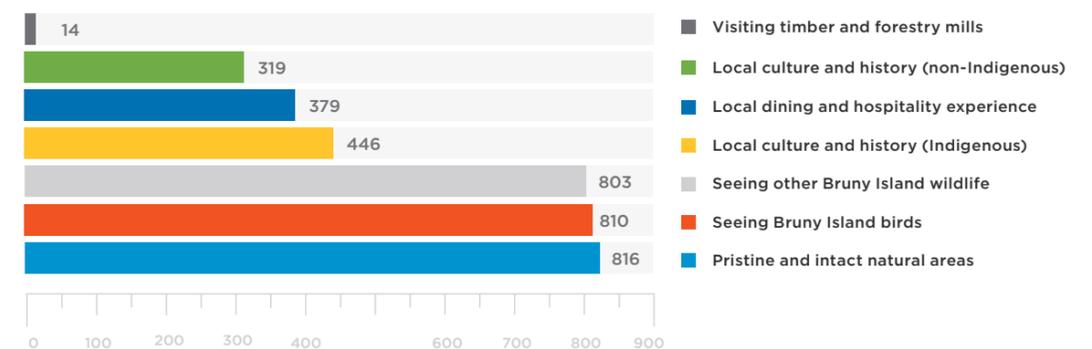


Figure 20. Drawcard destination attributes for previous visitors to Bruny Island (n = 980)

## Bruny Island

**KBA Trigger Birds:** Short-tailed Shearwater, Tasmanian Native-hen, Pied Oystercatcher, Green Rosella, Swift Parrot, Yellow-throated Honeyeater, Black-headed Honeyeater, Strong-billed Honeyeater, Yellow Wattlebird, Forty-spotted Pardalote, Scrubtit, Tasmanian Scrubwren, Tasmanian Thornbill, Black Currawong, Dusky Robin, Flame Robin, Pink Robin

A non-trigger species, but popular tourist drawcard is the small population of Little Penguins on Bruny Island



Short-tailed Shearwater

ANDREW SILCOCKS



Tasmanian Native-hen

ANDREW SILCOCKS



Pied Oystercatcher

ANDREW SILCOCKS



Green Rosella

ANDREW SILCOCKS



Swift Parrot

ANDREW SILCOCKS



Yellow-throated Honeyeater

ANDREW SILCOCKS



Black-headed Honeyeater

JOHN BARKLA



Strong-billed Honeyeater

JOHN BARKLA



Yellow Wattlebird

ANDREW SILCOCKS



Forty-spotted Pardalote

ANDREW SILCOCKS



Tasmanian Thornbill

ANDREW SILCOCKS



Black Currawong

ANDREW SILCOCKS



Dusky Robin

ANDREW SILCOCKS



Flame Robin

ANDREW SILCOCKS



Pink Robin

NIKKI LONG

**Other biodiversity:** Bruny Island Eastern Quoll, Bennett's Wallaby (White Morph), Dusky Antechinus, Long-nosed Fur Seal.

**Table 5:** Bruny Island KBA Tourism Destination Summary

<b>Aboriginal name</b>	lunawanna-allonah
<b>Climate</b>	Temperate/Cool Temperate
<b>State</b>	Tasmania
<b>Closest airport</b>	Hobart International and Domestic Airport
<b>Key habitats for nature-based tourism</b>	Coastline: Salt marshes, Lagoons, Intertidal mud, sand & salt flats, Sea cliffs, rocky shores & rocky islets Forest: Eucalypt woodlands, Eucalypt open forests
<b>Bird species richness</b>	160+
<b>KBA Trigger* and feature species</b>	<b>Birds*:</b> Short-tailed Shearwater, Tasmanian Native-hen, Pied Oystercatcher, Green Rosella, Swift Parrot, Yellow-throated Honeyeater, Black-headed Honeyeater, Strong-billed Honeyeater, Yellow Wattlebird, Forty-spotted Pardalote, Scrubtit, Tasmanian Scrubwren, Tasmanian Thornbill, Black Currawong, Dusky Robin, Flame Robin, Pink Robin  A non-trigger species, but popular tourist drawcard is the small population of Little Penguins on Bruny Island  <b>Other biodiversity:</b> Eastern Quoll, Bennett's Wallaby (White Morph), Dusky Antechinus, Long-nosed Fur Seal
<b>Other tourism 'pull factors' for the area (scenery, food and wine, events)</b>	<b>Cool Temperate Island Destination</b> <b>Scenic profiles:</b> Rugged coastal scenery (east coast), protected coastal channel (west coast), open forests, agricultural landscape.  <b>Nature-based tourism offerings</b> <b>Terrestrial:</b> birdwatching, other wildlife spotting, hiking, landscape appreciation, cycling <b>Coastal:</b> kayaking, beach-based activities <b>Marine:</b> wildlife cruise, pelagic birdwatching, surfing  <b>Other tourism infrastructure</b> Local food producers, local wine producers, diverse accommodation options (mostly encouraging self-catered)  Cultural attractions – Cape Bruny Lighthouse, Bligh Museum of Pacific Exploration, Bruny Island Quarantine Station, The History Room at Alannah  <b>Events</b> Biennial Bruny Island Bird Festival
<b>Tour guides, information and specialist accommodation</b>	<b>Tour Guides</b> Inala Nature Tours <a href="https://www.inalanaturetours.com.au/">https://www.inalanaturetours.com.au/</a> , Inala Private Nature Reserve.  <b>Visitor Information</b> The Gateway and Visitor Information Centre (81 Ferry Road, Kettering TAS) Bruny Island Tourism Inc. – <a href="https://www.brunyisland.com.au/">https://www.brunyisland.com.au/</a>  <b>Specialist accommodation</b> Inala Cottages; Additional accommodation options (cottage and guesthouse style).
<b>Local BirdLife branch and partner groups</b>	BirdLife Tasmania, Bruny Island Environment Network

### Case Study 3

#### Ulladulla to Merimbula KBA

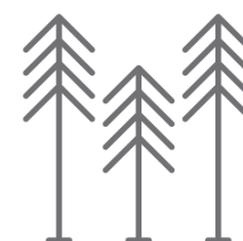
#### Site description

The Ulladulla to Merimbula KBA extends approximately 230 kilometres north to south along the NSW south coast (i.e. Pacific coastline). This large KBA comprises coastal habitats and a significant stand of Spotted Gum forest on which the trigger species for this site, the Swift Parrot, depends (BirdLife International 2021c). The whole section of coastline on which this KBA is situated is regional in nature, with the closest large city being Canberra, a 2 1/2 hour drive away. However, the area is a highly sought after holiday destination among many Australians, including but not limited to bird and nature enthusiasts. Although there are no nearby large urban centres, there are numerous regional centres that serve as useful bases from which to explore. These include the towns of Ulladulla, Bateman's Bay, Moruya, Narooma, Mystery Bay, Tathra and Merimbula.

Given the site is currently designated as a KBA due to the seasonal presence of threshold numbers of one bird species (likely to increase as a result of pending reviews), the site's attractiveness as a sustainable tourism destination should be based on the general nature experience. Fortunately, the coastal landscape and biogeographic features of this section of coast lend itself to exactly this kind of market positioning. A visitor can hike along cliff top walks, partake in surfing, snorkel with seals as well as seek out brilliant birdwatching opportunities. The Nature-based Tourism in Australia – Visitor Survey Data from Tourism Research Australia's section of this report (specifically Table 3) states the numbers of visitors to the NSW South Coast.

A significant proportion of the KBA is captured within the government managed protected area network. However, not all of these areas are designated for conservation purposes, and forestry reserves dictate that the region's biodiversity is not necessarily secure.

#### Supporter survey results



# 230km

230 km of coastal habitat and Spotted Gum forests critically important for Swift Parrots

Of the 1794 respondents who had previously visited the NSW South Coast (i.e. Ulladulla – Merimbula KBA), only 37 did so as part of an all-inclusive guided tour package (2%). All-inclusive tours represented an investment of \$16,500-\$32,000 (Fig. 21) with an average spend of up to \$865 per tourist. The majority of respondents were self-guided tourists and provided their trip expenditures (1460 respondents), and they contributed \$470,500-\$1,152,000 (Fig. 22) and an average of up to \$789 per tourist visiting The NSW South Coast (see Christmas Island case study for explanation of how these values are calculated). Thirty-six tourists who had organised their own trips previously before also booked a guided tour during their visit to the NSW South Coast.

The key attributes that were important to our survey respondents centred largely on the natural values of the region. Specifically, ‘Seeing South Coast NSW birds’, ‘pristine and intact natural areas’ and ‘Seeing other South Coast NSW wildlife’ were all deemed as important among the survey respondents (78%-88% of respondents across the three options) (Fig. 23). Given the location and climate of this KBA, it isn’t surprising that ‘Beach and coastal activities’ were also relatively important, along with ‘Local Indigenous culture and history’, comprising 57% and 53% respectively. All of these attributes highlight the importance of managing tourism in a way that enhances the natural and cultural values of the KBA, for environmental, social and economic reasons. More than three quarters of respondents stated that establishment or expansion of large-scale development (i.e. forestry) would deter them from booking a trip to NSW South Coast in the future.

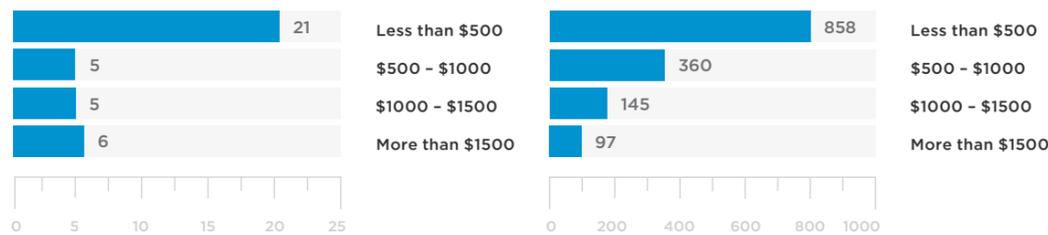


Figure 21. For all-inclusive tours, please indicate how much you budgeted for this trip to the NSW South Coast

Figure 22. For self-organised trips, please indicate how much you budgeted for this trip to the NSW South Coast in total

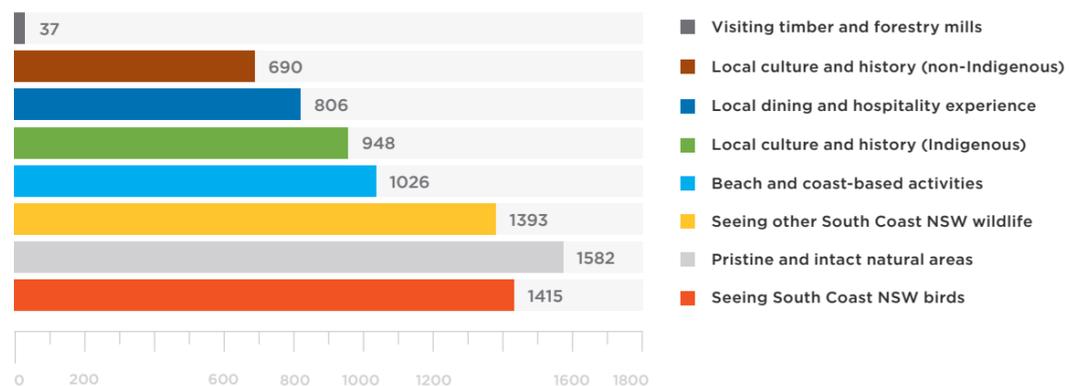


Figure 23. Drawcard destination attributes for previous visitors to NSW South Coast (n = 1794)

Table 6: Ulladulla to Merimbula KBA Tourism Destination Summary

<b>Aboriginal name</b>	Brinja-Yuin, Budawang, Jerrinja, Murramarang, Walbunja, Wandandian, Wodi Wodi, Yuin and Yuin-Monaro
<b>Climate</b>	Mild Temperate
<b>State</b>	New South Wales
<b>Closest airport</b>	Canberra International and Domestic Airport – KBA is also midway between Sydney and Melbourne International and Domestic Airports
<b>Key habitats for nature-based tourism</b>	Forest: Eucalypt woodlands, Eucalypt open forests – stands of Spotted Gum ( <i>Corymbia maculata</i> ) are the key habitat resource for Swift Parrots (i.e. key trigger for this KBA).
<b>Bird species richness</b>	300+
<b>KBA Trigger* and feature species</b>	<b>Birds:</b> Swift Parrot*, Little Tern, Hooded Plover, Pied Oystercatcher, Glossy Black-cockatoo and Rockwarbler (NSW’s only endemic bird). Regent Honeyeaters have also been recorded on both sides of Jervis Bay.  <b>Other biodiversity:</b> Koala, Eastern Grey Kangaroo, Swamp Wallaby, Red-necked Wallaby, Humpback Whales, Indo-Pacific Bottlenose Dolphins, Brown Fur Seals.
<b>Other tourism ‘pull factors’ for the area (scenery, food and wine, events)</b>	<b>Mild Temperate Coastal Destination</b> Scenic profiles: White sandy beaches, rocky coastal scenery, multiple tidal inlets and river systems, open forests, agricultural landscape  <b>Nature-based tourism offerings</b> Terrestrial: birdwatching, other wildlife spotting, hiking, landscape appreciation Coastal: paddle boarding, kayaking, beach-based activities Marine: diving, wildlife (whales, dolphins and seals) cruise, surfing  <b>Other tourism infrastructure</b> Local food producers, local wine producers, diverse accommodation options Cultural/historical attractions – Bawley Point, Point Perpendicular Lighthouse, Berry Historic Museum, Kangaroo Valley (and many more)  <b>Events</b> Multiple food and market events throughout the year
<b>Tour guides, information and specialist accommodation</b>	Ngaran Ngaran Cultural Awareness <a href="https://www.ngaranaboriginalculture.com/">https://www.ngaranaboriginalculture.com/</a> South Coast NSW <a href="https://www.southcoast.com.au/">https://www.southcoast.com.au/</a> Destination NSW <a href="https://www.visitnsw.com/destinations/south-coast">https://www.visitnsw.com/destinations/south-coast</a> Shoalhaven Visitor Information Centre, Ulladulla <a href="https://www.shoalhaven.com/place/shoalhaven-visitor-information-centre-ulladulla/">https://www.shoalhaven.com/place/shoalhaven-visitor-information-centre-ulladulla/</a> ; Merimbula Tourism Inc. <a href="https://www.escapetomerimbula.com.au/">https://www.escapetomerimbula.com.au/</a> Ecotourism Certified Tanja Lagoon Camp – Glamping <a href="https://www.tanjalagooncamp.com.au/">https://www.tanjalagooncamp.com.au/</a>
<b>Local BirdLife branch and partner groups</b>	BirdLife Shoalhaven <a href="http://www.birdlifeshoalhaven.org/index.html">http://www.birdlifeshoalhaven.org/index.html</a> ; Far South Coast Birdwatchers Inc. <a href="http://www.fscb.org.au/">http://www.fscb.org.au/</a> Eurobodalla Natural History Society <a href="http://enhs.org.au/">http://enhs.org.au/</a>

## ULLADULLA TO MERIMBULA

### KBA Trigger Birds: Swift Parrot\*

Non-trigger species, but popular tourists drawcards, include Little Tern, Hooded Plover, Pied Oystercatcher, Glossy Black-cockatoo and Rockwarbler (NSW's only endemic bird). Regent Honeyeaters have also been recorded on both sides of Jervis Bay.



Swift Parrot\*

MICK RODERICK



Little Tern

ANDREW SILCOCKS



Glossy Black-cockatoo

MICK RODERICK



Rockwarbler

JOHN BARKLA



Hooded Plover

JOHN BARKLA



Pied Oystercatcher

ANDREW SILCOCKS



Regent Honeyeaters

ANDREW SILCOCKS

**Other biodiversity:** Ulladulla to Merimbula Koala, Eastern Grey Kangaroo, Swamp Wallaby, Red-necked Wallaby, Humpback Whales, Indo-Pacific Bottlenose Dolphins, Brown Fur Seals.

## Case Study 4

### Moreton Bay and Pumicestone Passage KBA

#### Site description

The Moreton Bay and Pumicestone Passage KBA comprises approximately 100 kilometres of coastal and intertidal habitats between the mainland south-eastern coast of Queensland and a suite of sand islands just offshore. Pumicestone Passage – the body of water between Bribie Island and the mainland represents the northern extent of the KBA and the point where the Nerang River mouth meets the Southport Broadwater bounds the KBA in the south. The KBA includes North Stradbroke Island and Moreton Island, as well as numerous smaller sand islands in Moreton Bay, each supporting intertidal sandflats.

Along the mainland boundary, there are intermittent sections of intertidal habitat, used frequently by resident and migratory shorebirds; it is these shorebirds that were the trigger species for the KBA designation (BirdLife International 2021d). These important habitats have also warranted the site being listed as a Ramsar Wetland of International Importance. Despite this significant environmental importance, South East Queensland has undergone rapid urban development, especially along the coastal fringe.

The greater Moreton Bay area is also an important marine habitat, not least due to it being the only place in Australia where Dugongs gather in herds, and the only place in the world where they occur near a capital city. Marine turtles, dolphins and Humpback whales can also be seen throughout Moreton Bay and Pumicestone Passage (DES 2021). Both bodies of water are longstanding integral recreational hubs for the whole region. Fishing, diving, snorkeling, boating/cruising/sailing and marine wildlife appreciation are popular activities throughout the area (Ruhanen et al. 2019), made all the more popular by the subtropical climate South East Queensland enjoys.

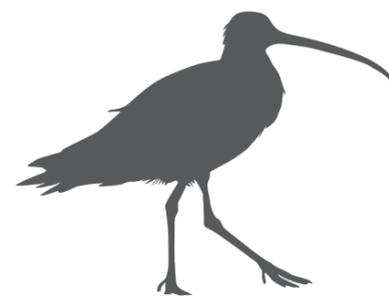
Despite the idyllic environmental attributes of this KBA, there are social and political aspects that require consideration in planning for sustainable tourism expansion (Ruhanen et al. 2019). For instance, both Moreton and North Stradbroke Islands are mostly covered by Native Title under the ownership of the traditional custodians, the Quandamooka people. Any activities on these islands (and inshore waters in the east of the Bay) require consultation and approval from these traditional custodians.

There are several key threatening processes that have impacted or are likely to impact the KBA's birds and biodiversity more broadly. Historically, all sand islands in the Bay have been subject to sand mining with mining operations on North Stradbroke Island ceasing as recently as 2019. While the mining activity itself is not a threat to the KBA intertidal habitats, the shipping traffic required to transport the mined minerals away from the island is. Furthermore, the natural areas of North Stradbroke Island have been irreversibly changed by these activities and despite some anecdotal views that rehabilitation has been successful, there has been little evaluation and scrutiny of rehabilitation practices (Burgin 2020). The end of sand mining may be positive for the environmental values of the island, but it has been met with uncertainty and outright opposition by the resident community (Burgin 2020), which is unsurprising, given sand

mining has been the main economic activity on the island for over 70 years. Another threat to the KBA is inappropriate development along the mainland coastal fringe, including mass urban housing developments (including artificial canal estates) and expansions of marina and harbor developments. These have the cumulative effect of reducing the amount of overall habitat available for migratory shorebirds, as well as exacerbating already chronic fragmentation, making it harder for these birds to find food resources that are already hugely depleted elsewhere in their global range.

#### Supporter survey results

Less than 12% of the 930 respondents who had visited the Moreton Bay and Pumicestone Passage KBA did so as part of an all-inclusive tour (103 respondents), representing an investment of \$39,000-\$85,000 (Fig. 24) and an average spend of \$825 per tourist (see Christmas Island case study for explanation of how these values are calculated). More than 700 respondents undertook self-organised travel in the area, and 25 of these booked a guided tour during their trip. The self-organised visitors in our survey indicated their total spend was \$197,500-\$550,000 and an average spend of \$742 per tourist (Fig. 25). Similar to the Ulladulla to Merimbula case study, the respondents indicated high association of importance to multiple aspects of the natural environment during their travel. Almost 85% of respondents selected the 'Pristine and intact natural areas' attribute, followed by 'Seeing Moreton Bay birds' and 'Seeing other Moreton bay wildlife' each attracting chosen by 82% of respondents (Fig. 26). Somewhat less important, but still popular was 'Beach and coast-based activities' and 'Local culture and history (Indigenous)' with 50%-60% of respondents nominating these as important. Only 9% of the 930 respondents selected 'Visiting boating and marina precincts' as important. Furthermore, 760 (82%) would be deterred from visiting the area again, in the event of the establishment or expansion of large-scale development in the Moreton Bay and Pumicestone KBA.



**Along the mainland boundary, there are intermittent sections of intertidal habitat, used frequently by**

**resident and migratory shorebirds ...**

Along the mainland boundary, there are intermittent sections of intertidal habitat, used frequently by resident and migratory shorebirds and it is these roughly 50,000 shorebirds that were the trigger species for the KBA designation (BirdLife International 2021d). These important habitats have also warranted the site being listed as a Ramsar Wetland of International Importance.

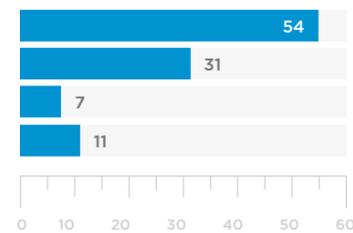


Figure 24. For all inclusive tours, please indicate how much you budgeted for this trip to Moreton Bay

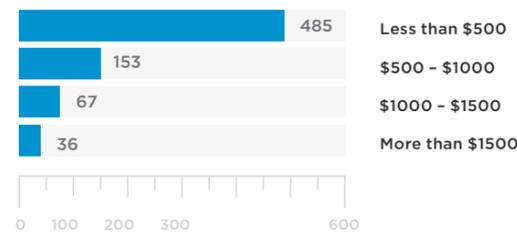


Figure 25. For self-organised trips, please indicate how much you budgeted for this trip to Moreton Bay in total

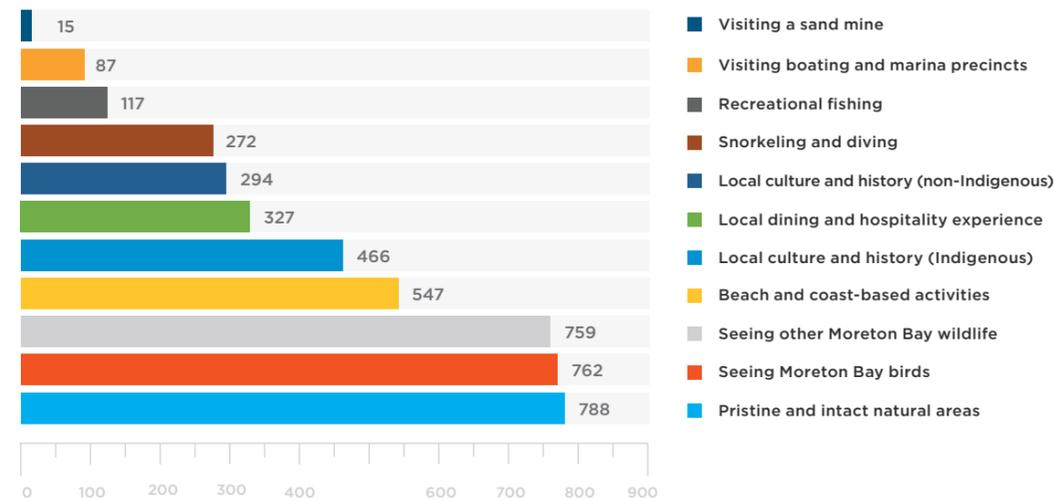


Figure 26. Drawcard destination attributes for previous visitors to Moreton Bay and Pumicestone Passage KBA (n = 930)

Table 7: Moreton Bay and Pumicestone Passage KBA Tourism Destination Summary

Aboriginal name	Quandamooka, Yugambeh, Turrbal
Climate	Subtropical
State	Queensland
Closest airport	Brisbane International and Domestic Airport, Gold Coast Airport, Sunshine Coast airport
Key habitats for nature-based tourism	Coastline: Estuarine waters, Intertidal mud, sand & salt flats, Mangrove wetlands, Seagrass beds, Corals, Saltmarshes Forests: Open woodland, coastal wallum heath, dune communities
Bird species richness	300+
KBA Trigger* and feature species	<b>Birds*:</b> Bush Stone-curlew, Pied Oystercatcher, Black-winged Stilt, Red-necked Avocet, Red-capped Plover, Bar-tailed Godwit, Eastern Curlew, Grey-tailed Tattler, Great Knot, Red-necked Stint, Sharp-tailed Sandpiper, Mangrove Honeyeater  <b>Other biodiversity:</b> Koala, Eastern grey kangaroo, Swamp wallaby, Red-necked wallaby, endangered ecological communities (coastal wallum heath), Dugongs, Turtles, Humpback whales, Indo-Pacific Bottlenose dolphins, Australian Humpback dolphins, Sharks and Manta rays

Other tourism 'pull factors' for the area (scenery, food and wine, events)

**Sand Island Destinations of Moreton Bay and Pumicestone Passage (North Stradbroke Island, South Stradbroke Island, Moreton Island and Bribie Island)**  
Scenic profile: Subtropical island escape, coastal heath and dunes

**Urban Destination Centres (Sunshine Coast Regional Council, Brisbane City Council, City of Gold Coast, Redland City Council, Moreton Bay Regional Council)**

Scenic profile: Sandy beach escape (Sunshine and Gold Coasts), capital city destination (Brisbane), coastal suburban destinations (Redlands and Moreton Bay)  
Secondary scenic profiles near or in KBA: hinterland rainforest (Sunshine and Gold Coast), river (Sunshine Coast and Brisbane), estuarine, sandflats

**Nature-based tourism offerings**

Terrestrial: birdwatching, other wildlife watching (all areas)  
Coastal: beach based activities, surfing (Gold and Sunshine Coast, North Stradbroke Island), important migratory shorebird viewing areas (Redlands and Moreton Bay/Brisbane)  
Marine: Snorkeling (Gold Coast and Moreton Island), diving (Gold Coast, Moreton and North Stradbroke Island), boat tours i.e. pelagic bird tours (Gold and Sunshine Coast), whale watching boat tours <http://brisbanewhalewatching.com.au/>

**Other tourism infrastructure**

Food and beverage focused streetscapes, extensive accommodation options, local tour operators (all areas)  
Cultural attractions - Queensland museum, State Library of Queensland, art gallery (Brisbane)

**Events**

Welcome and Farewell Shorebirds events, Bird Week at O'Reilly's Rainforest Retreat in the Scenic Rim KBA, various regional events through BirdLife Southern Queensland during National Bird Week (mid-late October)

Continued following page

## Moreton Bay and Pumiceston

**KBA Trigger Birds:** Bush Stone-curlew, Pied Oystercatcher, Black-winged Stilt, Red-necked Avocet, Red-capped Plover, Bar-tailed Godwit, Eastern Curlew, Grey-tailed Tattler, Great Knot, Red-necked Stint, Sharp-tailed Sandpiper, Mangrove Honeyeater



Bush Stone-curlew  
ANDREW SILCOCKS



Pied Oystercatcher  
ANDREW SILCOCKS



Eastern Curlew  
DUADE PATON



Grey-tailed Tattler  
ANDREW SILCOCKS



Black-winged Stilt  
ANDREW SILCOCKS



Red-necked Avocet  
ANDREW SILCOCKS



Great Knot  
ANDREW SILCOCKS



Red-necked Stint  
ANDREW SILCOCKS



Red-capped Plover  
ANDREW SILCOCKS



Bar-tailed Godwit  
ANDREW SILCOCKS



Sharp-tailed Sandpiper  
ANDREW SILCOCKS



Mangrove Honeyeater  
JOHN BARKLA

**Other biodiversity:** Koala, Eastern grey kangaroo, Swamp wallaby, Red-necked wallaby, endangered ecological communities (coastal wallum heath), Dugongs, Turtles, Humpback whales, Indo-Pacific Bottlenose dolphins, Australian Humpback dolphins, Sharks and Manta rays.

CONTINUED...

**Table 7:** Moreton Bay and Pumicestone Passage KBA Tourism Destination Summary

<p><b>Tour guides, information and specialist accommodation</b></p>	<p><b>Tour Guides</b>                  Gondwana Guides <a href="https://www.gondwanaguides.com.au/">https://www.gondwanaguides.com.au/</a>                  Araucaria Tours <a href="http://araucariaecotours.com/wordpress/">http://araucariaecotours.com/wordpress/</a>                  Faunagraphic Wildlife Tours <a href="https://www.faunagraphic.com.au/">https://www.faunagraphic.com.au/</a>                  Brisbane Whale Watching <a href="http://brisbanewhalewatching.com.au/">http://brisbanewhalewatching.com.au/</a>                  Several whale watching operators on the Gold Coast.</p> <p><b>Visitor Information</b>                  Indigiscapes  <a href="https://indigiscapes.redland.qld.gov.au/">https://indigiscapes.redland.qld.gov.au/</a></p> <p>Redlands Coast Visitor Information Centre  <a href="https://www.visitredlandscoast.com.au/">https://www.visitredlandscoast.com.au/</a></p> <p>North Stradbroke Island (Minjerribah)  <a href="https://stradbrokeisland.com/">https://stradbrokeisland.com/</a></p> <p>Moreton Island (Mulgumpin)  <a href="https://parks.des.qld.gov.au/parks/gheebulum-kunungai-moreton-island">https://parks.des.qld.gov.au/parks/gheebulum-kunungai-moreton-island</a></p> <p><b>Accommodation providers closest to KBA</b>                  Due to the coastal nature of this KBA, there are extensive nearby accommodation options, across all local governments. Key nature-based operations in the KBA include Tangalooma Island Resort <a href="https://www.tangalooma.com/">https://www.tangalooma.com/</a></p> <p><b>Specialist accommodation providers within broader region</b>                  O'Reilly's Rainforest Retreat</p> <p>Binna Burra Lodge</p>
<p><b>Local BirdLife branch and partner groups</b></p>	<p>BirdLife Southern Queensland</p> <p>Friends of Stradbroke Island (FOSI)</p>

# Concluding recommendations and SWOT analysis

The information presented in this report provides a snapshot of the scale of birdwatching as a tourism activity in Australia. This would not have been possible without two key sources of data:

1. The addition of 'birdwatching' as a specified activity on the NVS in 2019. The NVS will now provide an accurate and unbiased indication of how the industry is growing nationally.
2. The many BirdLife Australia members and supporters who responded to the questionnaire underpinning this report, providing valuable and insightful accounts of their birdwatching travel preferences and expenditure generally as well as in the case study KBAs.

The scale of birdwatching as a domestic tourism activity in remote and regional areas of Australia is significant, with daytrips and overnight trips representing an estimated value of \$283 million to the Australian economy. At the time of writing, international values were unavailable, but are probably almost certainly at least as significant. This all equates to an attractive investment into the local economies where these activities take place. These values must be viewed as an absolute minimum valuation of the birdwatching sector, with untold additional benefits in fostering greater conservation awareness and sense of place among the communities where birdwatching occurs.

This report has presented evidence to support the need to manage and enhance tourism experiences across remote and regional areas of Australia that yield

benefits to the travellers and the destination communities alike. For example, the vast majority of our survey respondents indicated that large-scale developments would be a deterrent to repeated travel. However, this does not preclude there being a need for infrastructure development that supports sustainability of the tourism industry and resident communities, especially in the island/near island KBAs reviewed here. Bruny, Christmas and Moreton Bay islands are all facing chronic issues related to waste management, including waste reduction, capture and removal, as well as recycling facilities. Waste management is one of the most rudimentary of attributes that can make or break a destination when it comes to sustainability – both in practice and reputation. Furthermore, this can impact on the livability of areas for resident communities, who may begin to associate waste issues with the tourists themselves, therefore eroding the support among those communities for any additional tourist activity.

In Table 8, we summarise the information reviewed and presented throughout the research that has underpinned this study in the form of a tabular SWOT (strengths, weaknesses, opportunities and threats) analysis. SWOT analyses are a useful framework in which to distill the key internal and external forces and attributes that influence the feasibility of an area achieving certain environmental, social or economic objectives. In this case we are interested in all three, but the emphasis is on the environmental sustainability of tourism development.

**Table 8:** SWOT Analysis for nature and bird tourism expansion in case study KBAs.

**Christmas Island (adapted from IOT RDO 2018)**



- Extant endemic species and high biodiversity (terrestrial and marine)
- Tropical climate
- Unique geology
- True escape from urban life – remote ‘off the beaten track’
- Unique cultural profile (Chinese, Malay and European)
- Extensive history
- Reasonably accessible during international pandemics in lieu of international tropical destination travel
- Safe and secure – low crime rates
- Reputation as a ‘destination’



- Limited on-island transport options (i.e. few rental cars relative to demand, no public transport)
- Limited hospitality infrastructure and fully engaged and qualified personnel
- Waste management limitations (including a lack of recycling) inhibit sustainability of resident and tourist populations
- Little eco-awareness among some cultural groups resident on the island
- There is currently no management plan guiding environmental sustainability practices for the island and its development



- Increased patronage by domestic birdwatching market
- Increased opportunity to create linkages between resident community, environmental groups and tourists through nature-based events and citizen science programs
- Design a sustainability strategy that aligns with existing strategic, policy and planning documents (i.e. Our Christmas Island 2010 Strategic Plan, other non-ratified plans and reviews). It is hoped the ‘Christmas Island Strategic Assessment’ underway with the Commonwealth Government will address this.



- Degradation of environment (i.e. key product offering) due to extractive industry and introduced species
- Mass tourism expansion (and impacts) without impact management and infrastructure investment
- Pandemic induced travel restrictions
- Extreme weather event-induced travel restrictions and associated travel insurance barriers

CONTINUED...

**Table 8:** SWOT Analysis for nature and bird tourism expansion in case study KBAs.

**Bruny Island**



- Extant endemic species and high biodiversity – especially birds
- Existing accredited nature-based tour operator offering best-practice, low-impact tours
- Numerous walks and hiking options
- Close proximity to capital city, yet feels ‘off the beaten track’
- Extensive historical and cultural experiences to complement nature-based activities
- Local food and beverage producers
- Good accommodation infrastructure
- An integrative tourism strategy to guide industry growth and multi-dimensional sustainability
- Safe and secure – low crime rate



- Concerns among some residents about the growth of tourism
- Need for investment in infrastructure to cater for increased tourism (roads, waste, emergency services)
- Lack of public transport



- Increased patronage by domestic birdwatching market
- Increased opportunity to create linkages between resident community, environmental groups and tourists through nature-based events and citizen science programs
- Better showcasing of additional activities and drawcards via seasonal events and improved accommodation (e.g. cultural elements, local artisans)



- Degradation of environment (i.e. key product offering) due to logging industry and introduced species
- Mass tourism expansion (and impacts) without impact management and infrastructure investment
- Pandemic induced travel restrictions

CONTINUED...

**Table 8:** SWOT Analysis for nature and bird tourism expansion in case study KBAs.

**Ulladulla to Merimbula**



- Diversity of nature-based experiences, both terrestrial and marine
- Temperate climate
- Extensive historical and cultural experiences to complement nature-based activities
- Local food and beverage producers
- Myriad accommodation and hospitality options along a long stretch of coastline
- Extensive information online for planning trips



- Little focus on marketing of terrestrial wildlife, especially birds (focus is on viewing captive animals)
- No strategy to underpin expansion and promotion of bird and nature tourism for NSW South Coast
- Not a 'Destination' with its own identity



- Bring greater emphasis on birds and terrestrial biodiversity through increased engagement between local environmental advocacy groups and tourism/visitor information representatives
- Develop an action plan for NSW nature-based tourism consistent with the NSW Food & Wine Tourism Strategy & Action Plan 2018 – 2022 and the Aboriginal Tourism Action Plan 2017 – 2020 (both already funded and developed)



- Degradation of environment (i.e. key product offering) due to forestry industry
- Mass tourism expansion (and impacts) without impact management and infrastructure investment
- Pandemic induced travel restrictions

CONTINUED...

**Table 8:** SWOT Analysis for nature and bird tourism expansion in case study KBAs.

**Moreton Bay and Pumicestone Passage**



- Diversity of nature-based experiences, both terrestrial and marine
- Cultural experiences to complement nature-based activities
- Ideally located near three large urban centres to maximise daytrip and overnight patronage
- Subtropical climate
- Ramsar site
- Local food and beverage producers
- Myriad accommodation and hospitality options along a long stretch of coastline
- Extensive information online for planning trips



- Address waste and recycling issues/shortfalls on the sand islands, especially North Stradbroke Island
- Little engagement between local environmental groups and tourism sector sees decisions being made without adequate consideration of the natural capital of the KBA
- No strategy to underpin expansion and promotion of bird and nature tourism in the region
- There is a need for better communication, transparency and prioritisation of actions and development among the communities throughout the KBA, but especially those tourism and business operators working alongside Quandamooka traditional owners on North Stradbroke Island
- Competing tourism activities



- Form an alliance or action group (environmental groups and tourism personnel) that advocates for tourism development with an emphasis on sustainability and conserving the myriad natural values of the KBA
- Follow up on community consultation regarding the Moreton Bay Regional Council's pending 'Regional Tourism Infrastructure Priority Project Plan' to ensure principles of sustainability for the KBA are considered and integrated
- Support a review and update of the Brisbane Destination Tourism Plan 2014-2020 to ensure principles of sustainability for the KBA are considered and integrated
- Support a review and update of the Redland City Tourism Strategy and Action Plan 2015-2020 to ensure principles of sustainability for the KBA are considered and integrated



- Degradation of environment (i.e. key product offering) due to large-scale development
- Mass tourism expansion (and impacts) without impact management and infrastructure investment
- Pandemic induced travel restrictions

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For the first time, we have a common language to talk about the most important places left for life on Earth: Key Biodiversity Areas (KBAs).

In 2016, at the World Conservation Congress in Honolulu, Hawaii, a partnership of 11 of the world's leading nature conservation organisations launched the new Global Standard for the Identification of KBAs. The Standard employs agreed scientific criteria to identify sites that contribute significantly to the global persistence of biodiversity.

The conservation of many bird species, and indeed the diversity of life, depends on protecting these areas. However, what we have discovered is that despite their international significance, many KBAs do not receive the protection they deserve and globally important habitat is being lost.

BirdLife Australia has identified over 300 KBAs across the country. The four KBAs (Bruny Island, Christmas Island, Moreton Bay and Pumicestone Passage, and Ulladulla to Merimubula) discussed in this report have been designated as 'In Danger' as part of BirdLife International's global campaign. Australia's KBAs in Danger include sites threatened by mining, water management, forestry and infrastructure development. Each of the KBAs in Danger provides habitat for species at risk of extinction. Fortunately, it is not too late to protect the values of these KBAs. Some solutions are easier to implement than others, but we know enough about the species at risk to know what actions are required to protect them. We simply need the political will and resources to do what needs to be done.

**This report provides an in-depth analysis of these four KBAs, describing the attributes that make them appealing as peak nature-based tourism destinations, the track record they have enjoyed as tourism destinations more generally and the potential benefits to the broader community if nature-based tourism is actively supported and promoted in lieu of environmentally degrading economic activities.**

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