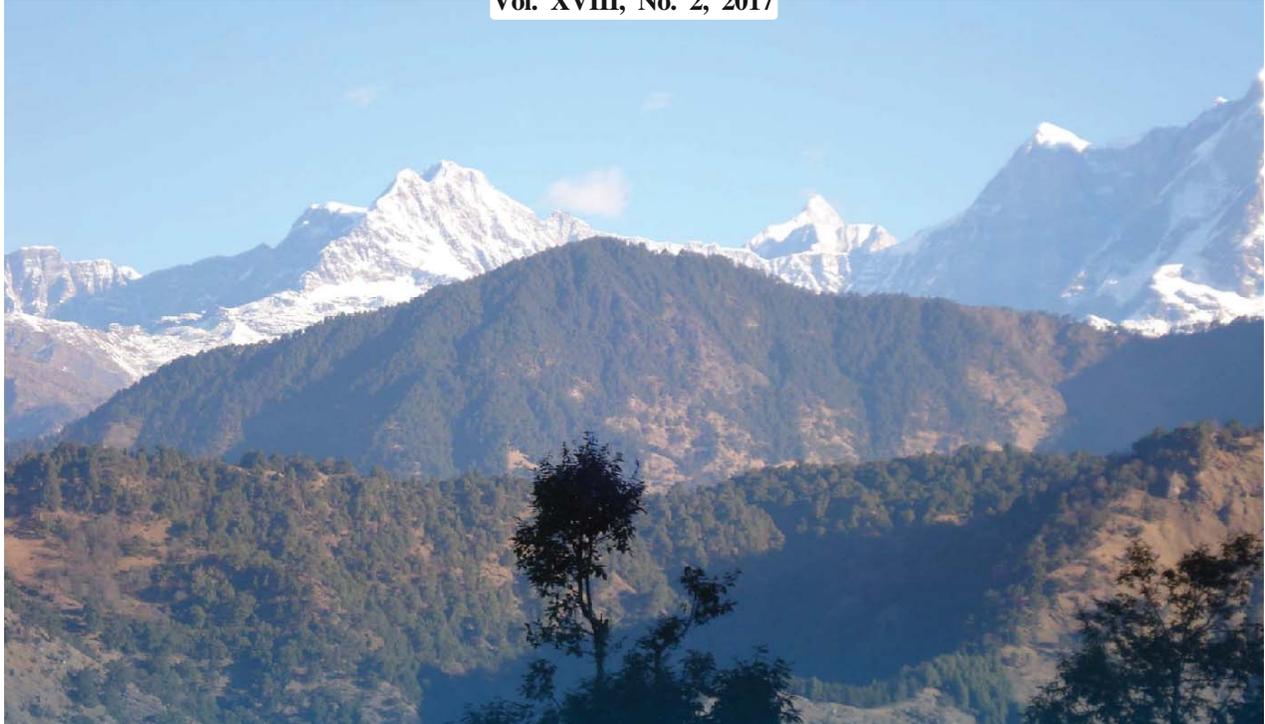


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## Key Words

Alternative tourism, sarawak, niche tourism market, bird watching, wildlife tours, consumer perception

## Abstract

Alternative tourism is the counter-cultural rejection of modern mass tourism on one hand and the counter-cultural conception of sustainable tourism on the other hand. It involves personal and authentic travel while encouraging interaction with the nature, community and the people. The alternative tourism models are centred more towards nature-based tourism with a focus on sound ecological conservation and preservation. Wildlife tourism, a nature-based tourism which consists of trips to destinations with the main intention to visit, enjoys the local fauna. Bird-watching is another type of niche market which is under wildlife tourism but it has its own significance to attract tourists. The purpose of this research is to disseminate insights into the possibilities of nature-based niche tourism such as bird watching and wildlife tours in Sarawak; consumer perception and expectations towards bird watching and wildlife tours in Sarawak; their knowledge about Sarawak tourism products and finally to analyse the potentials of Sarawak to develop an alternative tourism in conjunction with its natural resources. In addition to this, the study sought to examine the pertinent literature to identify the role of alternative tourism to support the nature based niche tourism and its potentials to accelerate sustainable tourism growth. This research is based on phenomenological approach; the interview method and focus group discussion was used to gain information from the respondents. The semi-structured interviews and focus group discussion was conducted to know about the participants responses regarding bird watching and wildlife tours. This qualitative study focused on the Australian consumers because the Australian market is one of Sarawak Tourism's important focus markets. Interviews with the consumers and focus group discussions were conducted at Sydney Olympic Park during the Australasian Bird Fair and Wildlife Expo 2017 which is a prominent bird and wildlife related events in the Pacific region.

## *Bird-watching and wildlife tours: alternative tourism escalates niche tourism markets? Aptness of Sarawak state, Malaysia*

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## INTRODUCTION

The digitalization, lifestyle changes, critical climatic conditions and the vanishing of endangered species from the ecosystems directly affect human living. Tourism is closely related to all these factors and environmental sustainability is a key factor to a long-term tourism growth and conservation of ecology. The United Nations World Tourism Organization (UNWTO) has taken initiatives to promote responsible and sustainable tourism, focus on economic growth, inclusive development and environmental sustainability. UNWTO's Sustainable Development Goals (SDGs) consisted of 17 goals adopted by world leaders in September 2015 at the UN Sustainable Development Summit to ensure sustainable growth in tourism sector. Sustainable development is crucial for environmental protection. In this context, alternative tourism places high value on environmental preservation; able to reduce negative impacts of tourism while bringing social benefits to the community.

Generally, alternative tourism is ecologically sound and devoid of environmentally destructive activities. The outlook of alternative tourism is more community-oriented and consists of small-scale developments of tourism attractions which are closely related to the community who are the key players of this type of tourism development. This can benefit the community and is not exploitative to the local people. The alternative forms of tourism are more concerned about "niche" markets rather than mass market. The "niche" concept in business enables entrepreneurs to commit resources and products that meet the needs of specific segments of the industry. It can be argued that a niche product is one whose quality and features satisfy specific groups. For example, nature-based tourism like bird watching and wildlife tours are niche tourism and this market focuses

more on people who love to see birds and wildlife, their ecological habitat and so on. The customers have special interest in these particular activities and this type of tourism otherwise called special interest tourism.

### Nature and Objectives of the study

The objectives of this paper are to analyse the implications of bird watching and wild life tours in the niche tourism market; understand the growth of alternative tourism through birding and wildlife tours in Sarawak; identify the special interest group's perception and expectations towards this niche tourism and finally to determine the part played by the birdwatching and wildlife tourism in promotion and marketing of Sarawak tourism. The consumer response was carried out through semi-structured interviews and focus group discussion. It was conducted during Australasian Bird Fair and Wildlife Expo 2017 at Sydney Olympic Park. The participants are birders and wildlife tourists because the study focuses on the niche market so as to target the specific consumers. The in-depth interview was conducted to collect information from the tour operators in Sarawak who offered bird

watching and wildlife tours for the visitors.

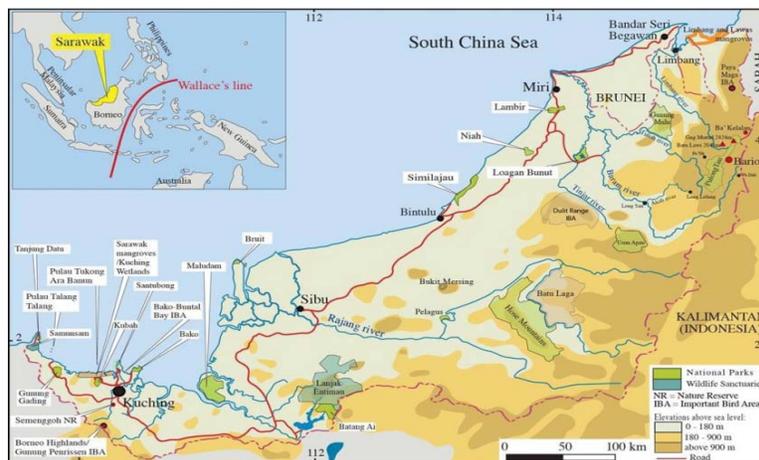
### Background of the Study Area

Sarawak state is one of the eco-adventure and heritage destinations situated in the Island of Borneo. The state is home to 14 national parks and other protected areas. All these national parks fall under the purview of the Sarawak Forestry Corporation (SFC). SFC in collaboration with Sarawak Tourism Board (STB) co-arranged many programmes such as adoption programmes, conservation programmes, educational programmes, eco-tours and wildlife encounters. These activities are designed to enhance understanding of tropical ecosystems, wildlife and biodiversity and raise awareness of the need for long-term, sustainable solutions to conserving the natural environment.

Sarawak is the legendary land of hornbills, rainforests and home for an array of tropical wildlife. About 650 bird species have been recorded in the state, which is a great portion of Borneo's bird species.

The map below shows Sarawak's most important protected areas, representing excellent birding sites, as well as other Important Bird Areas (IBAs).

Figure.1. Protected areas, National Parks and Birding Locations in Sarawak



Source: Sarawak Tourism Board Official Website (<https://sarawaktourism.com/attraction/bird-watching-sarawak>)

Sarawak consists of excellent national parks and nature reserves and the state offers splendid opportunities for birdwatching. The endemic bird species include Bornean Banded Kingfisher, Bornean Wren Babbler, Blue-banded Pitta, Pygmy White-eye, Chestnut-crested Yuhina, Bornean Barbet, Mountain Serpent-Eagle, and Sarawak's most emblematic birds, the Rhinoceros Hornbill. In the northern region of Sarawak is a UNESCO World Heritage site known as Gunung National Park, renowned for its limestone cave systems. Mulu consists of incredible biodiversity, including 262 bird species. The popular bird species in the cave consisted of Wrinkle-Lipped Bats, Bornean Hornbills, Fruit hunter, Hose's Broadbill and White head's Spider hunter. Ulu Trusan region, in the far north of

Sarawak, is known as one of the state's most promising birding destinations. The famous birds in this region are the Bornean Frogmouth, Bornean Leaf bird, Bare-headed Laughing Thrush, and Black Oriole. In the coastal region of Sarawak offers wintering grounds for waders and other water birds. The areas around the fishing village of Buntal comprises of spectacular congregations of large water birds such as Far-eastern and Eurasian Curlews (Sarawak Tourism Website).

### OVERVIEW OF BIRDING AND WILDLIFE TOURS IN SARAWAK

Sarawak consisted of ample scope of birds and other wildlife. The most prominent bird and wildlife species in the state are shown in the table below:-

**Table. No: 1. List of Key bird species and wildlife in Sarawak**

Birds	Wildlife
Bulwer's Pheasant	Bornean Orangutan
Bornean Frogmouth	Proboscis Monkey
Mountain Serpent Eagle	Bornean Gibbon
Mountain Barbet	Kayan Loris
Bornean Barbet	Western Tarsier
Hose's Broadbill	Hose's Civet
Whitehead's Broadbill	Sunda Clouded Leopard
Bornean Banded Pitta	Tufted Ground Squirrel
Blue-banded Pitta	
Black Oriole	
Rail-babbler	
Grey-breasted Babbler	
Pygmy Heleia (White-eye)	
Bornean Leaf bird	
Whitehead's Spider hunter	
Bornean Bristlehead	
Hook-billed Bulbul	
Bornean Bulbul	

Conservation and protection of animal and bird species are very important for sustainable growth. In this point of view, Sarawak Forestry Corporation takes initiative to implement conservation

programmes and visitors can participate in these programmes. An example is the Swiftlet conservation programme involves swiftlets which are small, insectivorous birds. This programme is designed to

showcase and create awareness of sustainable swiftlet management and conservation in Sarawak (Adventures in Conservation - Play your part in conserving the Earth). The birds are being conserved by the state Department of Forestry.

Sarawak Tourism will offer bird watching activities to potential tourists who are nature lovers or adventure seekers. Bird watching is considered to be a niche market and the enthusiastic nature lovers are anticipated to take part in the activity.

**Table No: 2 Statistics of Birdwatching tourists' inflow in Sarawak (2014-2017)**

Country	Year & No. of Pax			
	2014	2015	2016	2017
England	24	46	52	57
Germany	4	4	6	4
Finland	2	4	4	0
China	14	17	16	10
Taiwan	5	10	8	10
Hong Kong	4	6	6	6
USA	8	4	6	7
Japan	8	10	10	8
Australia	12	4	4	9
Singapore	6	9	7	9
Malaysia	4	0	0	2
Philippines	0	2	2	0
Sweden	0	0	5	0
India	0	0	0	2
Netherlands	0	0	0	3
<b>TOTAL</b>	<b>91</b>	<b>116</b>	<b>126</b>	<b>128</b>

Source: Cat City Holidays; Kuching

The tourists' statistics shows that the tourists' interest towards bird watching in Sarawak is gradually increasing every year. As a niche tourism product which is giving an added value to the leisure market in the state. There are a lot of endemic bird

species and various wildlife living in the Rainforest of Borneo Island; a great portion of these species are found in the state. As such, the state can potentially offer birding and wildlife tours and gazette different birding zones known as IBAs (Important

Bird Areas). These areas are located in the famous national parks. The main birding and wildlife areas in Kuching and surrounding areas include Kubah National Park, Santubong National Park, Bako National Park, Semenggoh Native Reserve, and Borneo Highlands. Areas in northern Sarawak are Gunung Mulu National Park, Pulong Tau National Park and Paych Maga. In this digital era, tech-savvy people are very keen on nature-based tourism such as experience wildlife tours and eco-tours. Sarawak is popular for its adventure tourism and nature-based tourism such as birding, wildlife tours, mountain climbing, forest walks, photography, eco tours, jungle trekking and cycling. The state's natural environment, physical geography and the topography are very suitable for these activities. However, there have been no studies conducted for the possibilities of these niche markets and consumer interest in such markets in Sarawak. Therefore, this study is very significant and useful for niche tourism market development and tourism promotion.

The Sarawak Visitor Survey Report 2016, indicated that 62.9% tourists are interested in leisure activities in the destination. From this report it can be understood that the possibilities of sustainable leisure activities and nature conservation programs make it a wider niche market which will be given strong consideration for environmental protection and visitor satisfaction. It can attract a lot of tourists at the national and international levels and give an added value to Sarawak's tourism industry. This has great potential to the growth of alternative tourism. The Australasian Bird Fair and Wildlife Expo, one of the greatest bird and wildlife-related events organised in the Australasia and Pacific region. The event includes talks, presentations and exhibitions of birds and wildlife and the locations of these attractions explained by experts from this field. The experts are keen to promote

the amazing diversity of wildlife from first-hand experience and provide opportunities to see these first hands, through custom made tours of local and global destinations.

## LITERATURE REVIEW

Alternative tourism is a buzz word which is generally has fewer negative effects on destination areas and populations without diminishing the positive economic effects. The Bulgarian Association for Alternative Tourism (BAAT) defined "Alternative tourism involves travel that is personal and authentic and encourages interaction with the local environment, people and communities. Alternative tourism includes package tours and individual tourist services in the following areas:

- Nature-based tourism tourism in natural environments, ecotourism, outdoors and adventure including biking, horseback riding, skiing, snow shoeing, rafting, diving, caving and hiking;
- Culture tourism rural, cultural heritage, ethnic, religious, wine, cuisine, music and crafts."(BAAT, 2010).

In addition to this, BAAT list down ten reasons the tourism industry stick to alternative tourism. These are,

1. Alternative tourism help to preserve nature
2. It support and give business to rural families
3. Alternative tourism gave an individual experience to the visitors up on their preferences with reasonable fares.
4. The tourists will receive excellent services and individual care in the destination with a "human treatment" as opposed to an all-inclusive package.
5. Local community take care the guest and guest is considered as host.
6. The visitors will get in touch with local culture and traditions.
7. The tourists will be at places with beautiful nature, fresh and clean air

8. The guest can experience authentic traditional local food.
9. The travellers can enjoy affordable outdoor sports activities.
10. Tourists are part and parcel of the community and destination.

Alternative tourism can be referred to other names such as green tourism, sustainable tourism, ecotourism and so on. This type of tourism concerns a variety of approaches; agro-tourism, community tourism and ethical tourism. These all alternative approaches allow to get out of the dominant mass tourism model. Alternative approaches given consideration to social and cultural dimensions, the relationship to the environment, the participation of the host communities and develop sustainable tourism strategies with significant economic benefits for the host country (Sopheap Theong et.al, 2015). The alternative tourism approach argues for any type of sustainable tourism development that safeguards benefit for the environment and local communities especially developing countries (Leksakundilok, 2004; Macbeth, 2005). In spite of the popularity of the alternative tourism, a standard definition has been yet to be advanced by the tourism literature. In a broader term, alternative tourism argues for any type of sustainable tourism development that ensures benefits for the environment and local communities especially developing countries and it also argues for greater tourists host interaction (Esi Akyere Mensah et.al, 2017).

### **INSIGHTS AND APPROACHES OF ALTERNATIVE TOURISM**

Different authors have different interpretations given to alternative tourism; Conway and Timms (2010) called slow tourism while Demoi had been called community-based tourism.

The difference of alternative tourism from mass tourism is that, alternative tourism is more heterogeneous in nature whereas mass

tourism is based on standardised products offered to a large number of tourists. Consequently, alternative tourism has been interpreted as niche tourism, derived from post-Fordism to provide consumers with a more personalised travel experience (Issac 2010, Conway & Timms 2010). Alternative forms of tourism created to preserve or improve local environment (eco-tourism), culture (heritage tourism, religious tourism) and socio-economic conditions (pro-poor tourism, community-based tourism). According to Hall and Lew, alternative forms of tourism is very important for local and regional development because they allow local communities to benefit more from the development of tourism.

Alternative kind of tourism has close proximity to nature, culture and the native inhabitants. It is usually considered as small scale tourism; which involves low-scale investments, are self-sustaining and operate with high levels of involvement of the local communities. The involvement of the local population would improve contact between locals and their foreign guests and ultimately would offer a more authentic, meaningful and satisfying experience for both visitors and hosts. Thus, alternative tourism aims at establishing direct personal and cultural intercommunication and understanding between the host and visitor. It might be derived the basic principles consisted of;

- a) It should be based on dialogue with the locals who must be informed of its effects,
- b) It should be environmental friendly and attributing respect to local culture and religious tradition,
- c) The scale of tourism should be adjusted to the capacity of the local area to cope, measured in aesthetic and ecological terms (Eirini Triarchi & Kostas Karamanis, 2017).

Eco-tourism is acknowledged as one of the best ways to conjoin economic development

with environmental sustainability. The niche markets in this type of alternative tourism are more environmental friendly tourism types such as wildlife tours, bird watching, fishing, kayaking etc. Perhaps it could nurture the growth of these niche markets. These type of tourism is considered as alternative tourism with special focused areas and small scale in nature. David Weaver(2015) mentioned alternative tourism as regarded as “good tourism” and would emphasised that it can empower local people, celebrate their authentic local culture and attract small numbers of sensitive visitors whose expenditures were expected to foster linkages rather than leakages, especially in Third World countries or peripheries of developed countries inhabited by indigenous people. In a broader view, alternative tourism is reverse of mass tourism and its spectrum is small. The critical point of view, the small scale tourism sometimes imply limited bargaining power and exposure and low levels of tourism-related experience and lack of expertise in hospitality service(poor service standards) which leads to consumer dissatisfaction.

#### **ALTERNATIVE TOURISM AND NICHE MARKETS- THE LINK**

The characteristics of alternative tourism pinpoint small scale tourism which is more sustainable in nature and close to community. In this context, the term “niche” is applicable to describe alternative type of tourism. Niche is a specialised market, usually centred on visitors' particular interest or needs and “niche market” as a more narrowly defined group where by individuals in the group are identifiable by the same specialised needs or interests and are defined as having a strong desire for the products on offer (Marina Novelli 2005). This is the core of alternative tourism goals and the growth of

tourism alternatives in a destination has very special interest and follow sound ecological principles. The size of the niche market can vary considerably but effectively it needs to be balanced between being large enough to produce sufficient business and small enough so that it is overlooked by competitors. The niche tourism markets includes lot of tourism activities such as adventure tourism, nature-based tourism, food tourism, craft tourism, culture and heritage tourism, business tourism etc. The activities in niche tourism are very specific, for example, nature-based tourism more towards forest trekking, gardens, cycling, mountain biking, walking, hiking fishing, mountain cycling and camping. This perhaps the essentials of alternative tourism market.

#### **NICHE MARKETS-BIRD WATCHING AND WILDLIFE TOURISM AND ITS POTENTIALS TO PROMOTE ALTERNATIVE TOURISM**

Bird watching and wildlife tourism is a type of biodiversity tourism and it helps to reduce the detrimental impacts of mass tourism. It respects nature, the physical environment, local community, culture and the local infrastructure. It is a form of alternative tourism which is more close to nature; at the same time it also considers community participation. The alternative tourism and sustainable development in Kenya showed that, alternative tourism development has drawn attention to the role of local people in biodiversity conservation and this will lead to greater local participation in the ownership, management and control of ecotourism enterprises (Isaac Sindiga, 2010).

The visitor statistics of these alternative tourism activities are increasing every year. The global market is estimated to be around 12 million trips annually; up to 3 million people taking a holiday to specifically visit the alternative niche products and take part

the niche tourism activities (Mintel, 2008). In contrast, the visitors those who have different interest unable to participate in those specified activities; and the alternative niche tourism market struggle to find tourists inflow and consumer satisfaction. The visitors, who are not interested the unique niche products and activities no longer want to visit the destination. In this situation the Destination Management Organizations (DMOs) has the responsibility to develop alternative products which is up to the consumer demand. The alternative tourism products development has several facets to become successful. It should be in line with visitor demand, environment friendly and target to specific tourism product. One of this type of alternative tourism is bird watching and wildlife tourism, as a distinct class of niche tourism, are becoming increasing demand and popularity.

Tourism and conservation of birds and wildlife is in a symbiotic relationship. Wildlife tourism, a type of alternative niche tourism product which can be considered as a form of ecotourism when it occurs within the context of nature-based activities that provides environmental interpretation and adopts environmentally responsible practices. In cases where a tourist travels to a destination primarily for the purpose of having a wildlife experience, then wildlife tourism can be seen as a form of special interest tourism. In wildlife tourism, tourists participate in activities such as safaris, viewing wildlife and wildlife photography. The birds, wildlife, flora and fauna can give add value to tourism and visitor experience. This can contribute to the economic sector in the destination. In Costa Rica, 41% of the earnings from its \$1 billion revenue in tourism was from bird watchers (Tourism Institute Costa Rica, 1999). There is a close connection between niche tourism and leisure tourism in terms of visitor satisfaction and tourists revisit intentions.

The International Ecotourism Society, 2000 revealed that an estimated 20-40% of all leisure tourists are thought to have an interest in some form of wildlife watching; the destinations have diverse bird and wildlife and can draw revenue based on these variables:

1. Increase the length of stay of tourists
2. Increase the spending per tourists
3. Increase the satisfaction of tourists
4. Retain tourist loyalty and achieve a higher percentage of return visits.

#### **DESTINATIONS INNOVATIVE APPROACHES TO NATURE BASED ALTERNATIVE TOURISM**

European destinations take initiative to promote alternative tourism to overcome the dangers of mass tourism. Spain as one of the leading countries made lot of progress in developing alternative forms of tourism in relation to changing global trends. Slovenia was trying to promote itself with both sea-sun-sand type of tourism and used alternative tourism activities with newly-determined tourism policies. Croatia had used alternative tourism activities (eg:-cultural tourism) to replace mass tourism activities (Loizos Christou, 2012).

In Spain, the innovative approach towards bird watching has given an added value to its alternative tourism product marketing. This successful approach has empirically proven that it can contribute high income to the destination if it is properly managed and developed. They introduced innovative approach in bird watching which had given added value to the visitor experience. The successful project titled "*Innovative approach to nature tourism in Spain: Creation of a mobile bird watching*" contributed new insights in this niche product marketing and promotion in domestic and international market. The project was designed as *Caravan tours for bird watching*. The innovative designs include the application of latest technology

in tourism product development and the project scope is to enhance visitor experience, increase the visitors' inflow in to the destination and to improve community participation in tourism related projects. It is an alternative tourism development model which may use digital technology to promote the niche tourism. In this sense, a new type of alternative tourism known as "ornithology tourism" has emerged in the digital age. The main technological applications they have included is the caravan equipped with the latest technology so as to be converted to a mobile bird observatory used for ornithology tourism. The purpose of a mobile bird watching facility for tourists is to provide good knowledge of the local birdlife, their habitats and conservation needs. This is a unique type of tourism experience for the visitors and the expected benefits are to provide the rural residents a sustainable and alternative source of income. The outcomes of this project are a rise in the number of visitors and the new bird watching facility offers nature lovers and bird watchers an innovative way for observing birds. The province and region also benefit from additional tourism products that make the area more attractive to tourists, giving a boost to its economy while protecting and promoting the region's biodiversity (European Network for Rural Development 2007-2013).

In Malaysia, niche tourism activities include angling activities, diving, fishing, kayaking, bird watching and wildlife tours. The overall objective of tourism development in Malaysia is the promotion of destinations and creation of public awareness on the importance of preserving wildlife species. Bird watching and wildlife tours are promoted with the collaboration of Malaysian Nature Society. The birding activities are promoted by the Ministry of Tourism and Culture Malaysia both domestic and internationally. Fraser's Hill

International Bird Race, Kuala Tahan Bird Count, the Borneo Bird Festival in Sandakan are some of the activities organized under the Ministry of Tourism and Culture Malaysia. (Tourism Malaysia, 2016).

#### **METHODOLOGY**

Qualitative research methodology used in this research is descriptive in nature. The primary data was collected through the interview method. The respondents are tourists (Australian market) and tour operators (Sarawak). Semi-structured interview checklist was used to collect data from tourists. The study focused on Australian consumers because Australia is one of Sarawak Tourism's focus markets and the state is trying to get more Australian tourists through the promotion of its natural attractions with special niche markets. Purposive sampling was used in this study to select respondents. The tour operators in Sarawak were selected based on their tourism product offerings and focus markets. Those who are selling Birding and wildlife tours and particularly in the Australian market were selected for the study and in-depth interviews were conducted to gain valuable information.

The respondents who were selected for the interview attended the Australasian Bird Fair at Sydney Olympic Park in November 2017. The interviews were carried out during the Fair. The interview checklist was segmented into three parts. The first part is consumer knowledge about Sarawak, especially bird watching and wildlife tours and other tourism products; the second part is consumer perception and expectation towards nature-based alternative tourism products such as bird watching and wild life tours and their intention to visit Sarawak. The last part is on the demographic characteristics of consumers.

A total of 18 respondents were interviewed and their demographic analysis is based on three main aspects: gender, age and

nationality. The statistical methods used to get the frequencies and percentage. In addition, a focus group discussion was conducted to gain more information. The focus group discussion was conducted at the Sarawak Tourism Board (STB) booth at the same event. Nine participants (who are involved in nature-based tourism activities) were involved in the discussion. The main themes in the discussion were related to the visitors expectations about nature based niche tours, the motivating factors to choose a destination for bird watching and wildlife tours, and finally their expectation and intention to visit Sarawak.

The in-depth interview was conducted to collect information from tour operators in Sarawak. There are only two tour companies (tour operators) which are fully involved in this niche market and the managers of this company were selected for the in-depth interview. This was administrated with the help of an interview guide. There are a total of five main questions included in the interview guide; and the questions are positioned on the trends of arrival of birdwatching and wildlife tourists in Sarawak every year, their opinion about this niche market's role in Sarawak Tourism promotion, this niche product compatibility in the market place and finally the issues faced by the tour operators and tourist's guides to promote this niche market in Sarawak.

#### **RESULTS AND DISCUSSION**

The birding and wildlife niche markets could contribute the development of alternative tourism. The value of wildlife and birds can give a specific experience to the tourists and it will closely relate to the steps taken by the destination's management to attract tourists. These include a way to bring bird and wildlife closer to the customers (visitor interpretation and good facilities to provide viewing opportunities). The experts at the Australasian Bird Fair and Wildlife Expo are keen to promote the

amazing diversity of wildlife from first-hand experience and provide opportunities to see these first-hand through custom-made tours. The presentations consist of distinguished work carried out by conservation groups in line with the conservation of birds and other wildlife across Australia, New Zealand and Pacific region. The fair provides opportunities for birding and wildlife tour operators and resorts to showcase their services to a significant segment of potential customers in the expanding world of ecotourism. The Australasian Bird Fair and Wildlife Expo 2017 was a platform for bird lovers and nature conservationists to join together and exchange ideas to reduce the environmental impact and to protect wild life. Nature lovers and conservationists participated and shared their views at the event which was held at Sydney Olympic Park from 3rd to 5th November, 2017. It was a great stage for synergizing all industry players, consumers, researchers and academicians. The fair had provided an ideal venue for birding groups, bird and wildlife tour operators, binoculars, camera suppliers and provide facilities for exhibitors to present their birding interests before visitors to the event.

#### **CONSUMER AWARENESS ABOUT SARAWAK TOURISM PRODUCTS**

The interview results identified majority of consumers want to escape from the hectic city life which pushed them away from the urban life and motivated them to spend their time to relax and enjoy in the natural settings. They are very keen in conservation programmes. The study specifically to understand the awareness of Australian consumers' knowledge about Sarawak and its tourism products. The state has a total of 37 national parks out of which 16 are open for visitation. Four of these national parks have accommodation facilities. The interview about the tourism product knowledge in Sarawak showed that more

than half of the respondents are aware about rainforests, mountains, national parks, wildlife, rich flora and fauna in Sarawak. However the majority of respondents have little or no knowledge about the facilities offered by the state such as sports, health or wellness, fishing, kayaking and diving. This may be because the respondents are bird lovers and special interest groups who are

involved in wildlife tours and bird watching. From the interview sessions, it can be seen that all the participants intend to visit Sarawak and they would love to watch the bird species and wildlife in the state. This indicated that this niche tourism has the potential to raise Sarawak's tourism profile in international market.

**Table No:3 Awareness about Sarawak Tourism Products**

Sarawak Tourism Products	Awareness about tourism products (%)	
	Yes (%)	No (%)
Sarawak Cultural Village	5.6	94.4
Rainforests & mountains	66.7	33.3
Authentic local food	33.3	66.7
Flora & fauna	55.6	44.4
Longhouses	27.8	72.2
Culture & heritage	22.2	77.8
National parks & wildlife	66.7	33.3
Festivals & events	16.7	83.3
Beach	11.1	88.9
Jungle trekking	16.7	83.3
Sports & games	0	100
Health & Wellness	0	100
Fishing, Kayaking & diving	0	100

**BIRD WATCHERS AND WILDLIFE TOURISTS TOP PREFERRED ACTIVITIES IN A DESTINATION**

The study results about the preferred activities the participants wish to engage in a destination revealed that they wish to do nature-based activities where the prime

interest they have shown in wildlife tours and birding followed by forest walk. They revealed that, *“We are bird lovers and we know a lot of bird species and its ecology. So our preference in a destination is to provide us good tour guide with an extensive knowledge about birds and*

*animal species.*” More than half the respondents are interested in experiencing local food and would like to visit cultural and heritage attractions in Sarawak and some showed interest to involve in photography. They mentioned that, they

love to take pictures of endangered birds and wildlife and they would like to post it in social media and document the ecology and settlement patterns of birds and animals.

**Table No:4 Respondents preferred activities in a destination**

Top preferred activities	Opinion of respondents (%)	
	Interested (%)	Not interested (%)
Wildlife tours & bird watching	16(88.9)	2 (11.1)
Photography	8(44.4)	10 (55.6)
Trying local authentic food	10 (55.6)	8 (44.4)
Culture/ heritage	10(55.6)	8 (44.4)
Forest walk	14(77.8)	4 (22.2)
Visiting beach	5 (27.8)	13 (72.2)
Cycling & mountain biking	3 (16.7)	15 (83.3)
Visit museums & art galleries	7 (38.9)	11 (61.1)
Fishing, diving & kayaking	3 (16.7)	15 (83.3)
Shopping	1(5.6)	17 (94.4)

**CONSUMER PERCEPTIONS AND EXPECTATIONS TOWARDS BIRD WATCHING AND WILDLIFE TOURS**

The focus group discussion results shown that, the participants have different perceptions and expectations but they all are very keen about sustainability and environmental conservation. Some of the highlights from the respondents regarding the perceptions and expectations are;

*“We wish to see a lot of birds in Sarawak. Our preference is to be a good mix of different species of birds, wildlife, food and culture in a destination.” (Respondent A, Australia).*

*“We expect Sarawak can offer good facilities for observing birds and wildlife.*

*We are nature lovers, usually travel in small groups and our demand in a destination is to provide us an informative tour guide” (Respondent B, Bird club members, Australia).*

Some of the respondents remarked that they love to visit Sarawak but are concerned about the future of Sarawak's natural environment. They mentioned that deforestation from the increase in areas of oil palm tree plantations will spoil the natural habitat of birds and animals. Regarding the motivations to choose nature-based tourism, many participants acknowledged the importance of nature-based tourism by suggesting:

*We are looking for the destination which*

*gave importance to conservation and protection to birds and animal life. Participants also commented that they like to visit niche tourism destination because mass tourism destinations are crowded and polluted the environment” (Bird club members, Australia).*

*“I choose destinations that are as close as being unspoiled as possible; and I wish to see large number of endemic species (varieties of birds)” (Respondent B, New Zealand).*

The interview and focus group discussion results showed that there is a high potential of this niche tourism growth in Sarawak. This nature-based alternative tourism can promote Sarawak biodiversity in a sustainable way. In this scenario it can be seen that niche tourism towards birding in Sarawak focuses on the listing of bird species classified based on the genus and species names, their habitat, their settlement, breeding time and patterns. It can be obvious that experienced and trained tour guides are an inevitable part of this niche tourism growth. The respondents are very keen in conservation programmes and some are active members of bird clubs.

#### **DEMOGRAPHIC CHARACTERISTICS OF RESPONDENTS**

The samples generally has an unequal balance between genders, were 8 males and 10 females. With respect to age, a higher numbers are above 60 (13), 50-59 (4) and one respondent in the age range 40-49. Based on the nationality 17 respondents are Australians and one participant from New Zealand. The demographic profiling showed that the participants prefer to travel after retirement and want to escape from the hectic city life which pushed them away from the urban life and motivated them to spend their time to relax and enjoy in the natural settings.

#### **CHALLENGES OF SARAWAK AS A BIRDING AND WILDLIFE NICHE MARKET DESTINATION**

Sarawak is part of a competitive environment of national parks with endemic species of birds and animals in the Southeast Asia region. However, the state does not get much attention for this niche market nationally and internationally. Lack of quality guides, comprehensive information about birds and wildlife, informative guide books are major challenges faced by the destination.

The indepth-interviews with the birding and wildlife tour operators in Sarawak showed that they are facing a lot of challenges when marketing this niche tourism on an international level. They also point out that, this is the reason for the gradual growth of birders and wildlife tourists in the destination. The tour operators highlight the fact that lack of accessibility to the locations and lack of experienced tour guides are the major constraints. *“Sarawak is still facing a few challenges in birding and wildlife tours; where it is slow to attract the increasing number of birdwatchers. Most of the good birding sites in Sarawak are quite remote, accessibility is limited and infrastructures are not really ready. Therefore these factors limit the number of birds to explore. As for wildlife tours, they are considered to have fairly increased but confined to Bako National Park and Semenggoh Nature Reserve only” (Yeo Siew Teck, Tour Manager, Cat City Holidays).*

#### **RECOMMENDATIONS**

To encourage and market bird watching and wildlife tours, Sarawak State Government via the Ministry of Tourism, Arts and Culture and Sarawak Forestry Corporation should take necessary action to step up its organised frame work.

**STRATEGIES FOR DEVELOPING THE BIRDWATCHING AND WILDLIFE NICHE TOURISM IN SARAWAK**

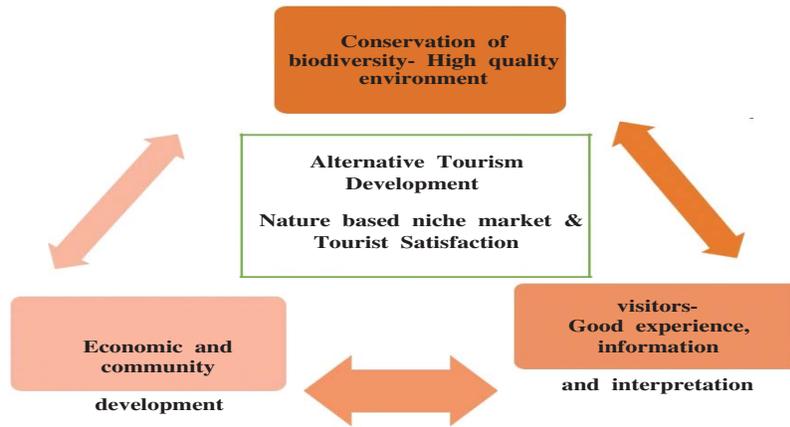
Sarawak needs efficient and trained tour guides to promote “birding” niche market tourism. The tour guides must have good knowledge of bird ecology and identification techniques. The existing brochures and website information of birding and wildlife need to be updated by the relevant authorities who should take initiative to prepare the list of all bird

species and wildlife along with the locations of their habitat in Sarawak. In addition to that, they establish zoning in forested areas for bird watching.

Birding and wildlife tours are part of responsible and sustainable tourism. When promoting this niche tourism market, forestry authorities can take a sustainable tourism triangle approach that involves:

1. Conservation of biodiversity
2. Economic and social development and
3. Providing a quality visitor experience.

**Alternative Tourism- Bird watching & wildlife tours (Sustainable Niche Tourism Development Model)**



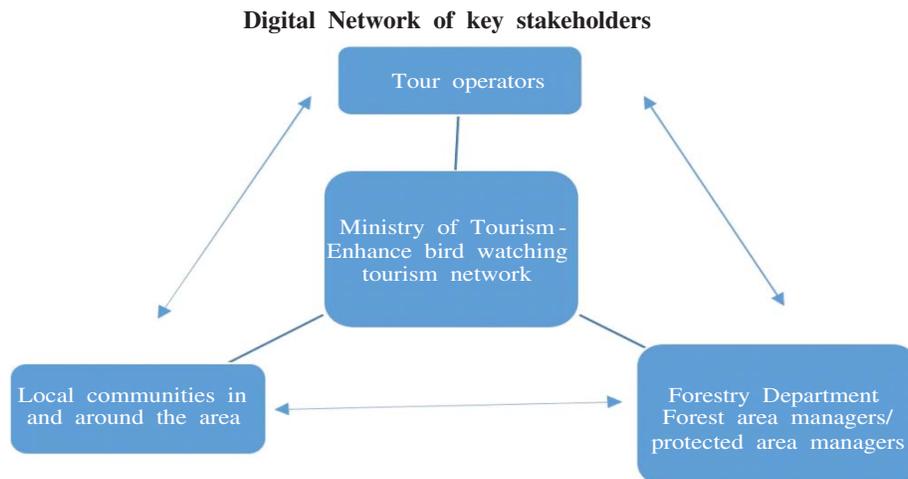
**Source: Researcher's own illustration**

For the visitors or tourists to gain good experience: - The responsible departments, should take initiative to provide comfortable lodging and infrastructure facilities in the locations near the tourist spots. Public-private partnerships are essential in this scenario. The tour guides must be competitive in interpretation of bird species, their habitat and other relevant information. They should be able to provide all kinds of information about Sarawak biodiversity. Customer satisfaction will be achieved through careful visitor

management.

The tour operators must be aware of this niche market and have better understanding of this responsible tourism. They must enhance their knowledge and skills for involving and promoting the development of bird watching tours.

There must be a network of participants (tour operators-local community-forest managers) to enhance bird watching niche tourism in Sarawak through Digital Connectivity.



**Source:- Researcher's own illustration**

In general, the birding and wild life tours give added value to tourism experiences. They can maximise positive impacts of tourism and minimise negative impacts. This niche market will help to bring about increased activities towards conservation of birds and wildlife.

#### **WAYS ALTERNATIVE TOURISM SUPPORT BIRDING AND WILDLIFE NICHE TOURISM MARKETS**

Birding and wildlife tours niche markets are under alternative tourism which can mitigate the dangers of mass tourism in many destinations. That being said, it can increase revenues by attracting new types of tourists. For example, operators may formulate packages with a variety of activities to attract tourists who enjoy bird watching and wild life tours alongside other activities. It will become a powerful generator of jobs to the local communities and an incentive to protect wildlife and the local environment. This type of alternative tourism has a symbiotic relationship between tourism and conservation which can pinpoint sustainability in such a way to reduce negative environmental impacts and maximise positive impacts. It can support to accelerate community engagement and

provision for conservation in destinations.

The birdwatchers and wildlife niche markets are specialist forms in general tourism. These kind of tourists are generally from the high-spender market segment. Usually these travelers have deep knowledge about this niche market and are well-experienced tourists who have high expectations of bird and wildlife species. Another unique feature of these niche tourists is they have high expectations in the destinations and the level of knowledge of tour guides. Hence operators in this specific niche market must be sensitive in dealing with its customers and give high importance to customer satisfaction. Once the destination can win customer loyalty, this niche tourism can attract a lot of tourists through positive word-of-mouth promotion whether verbally or through social media. This consumer-generated reviews can accelerate alternative forms of tourism in Sarawak.

#### **CONCLUSION**

Alternative tourism is specially focused on the heterogeneous aspects such as environmental sustainability and local community involvement. This niche market under alternative tourism such as birding and wildlife tours usually gives deep respect

to the environment and community. It emphasizes stability and wellbeing of humans and nature in a holistic way.

In a nutshell, this study reflects upon the stand of Sarawak in the birding and wildlife niche tourism market. One of the outcomes of this study is that it pinpoints consumer expectation and perception towards Sarawak and the popularity of its natural landscape in overseas markets. Based on the feedback

from the consumers, Sarawak can offer an authentic visitor experience and can cater to the needs of these niche tourists because of its abundant ecology, hospitality services, cultural and heritage attractions. In the future, this can contribute to the exponential growth of birding and wildlife tours in Sarawak and the state will slowly turn into a preferred alternative tourism destination.

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