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The Growth of the New Zealand Whale Watching Industry

An IFAW Report

May 2005

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A socioeconomic assessment

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- Prepared by
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Message from the Minister

New Zealand is a nation which has embraced the concept of eco-tourism – inviting locals and international visitors to appreciate our spectacular flora and fauna whilst ensuring it is protected for future generations.

In the years since New Zealand moved from whaling to whale conservation we have seen the whale and dolphin watching industry become one of the jewels in the eco-tourism crown.

From sperm whales to Hector's dolphins, humpback whales to dusky dolphins - we are blessed in New Zealand with the opportunity to marvel at these magnificent creatures year round.

Now worth close to \$120 million to the New Zealand economy, more than 425,000 people enjoyed whale and dolphin watching in 2004, almost double the 1998 number of 230,000. I am heartened that communities all around our coastline continue to prosper from the wealth of our marine wildlife.

This report highlights the growth in the industry and the importance of protecting our whales and dolphins. We have a valuable industry at stake, worth far more than whaling ever was to our nation. And yet whales continue to face a wide range of threats including ocean noise, pollution, ship strikes and whaling.

As we in New Zealand reap the benefits of the whale watching industry we must also fight for increased protection for whales through forums such as the International Whaling Commission.

I commend this report from IFAW, and urge all those who have experienced the joy of whale and dolphin watching to get involved in efforts to conserve these magnificent creatures and their environment.

Hon Chris Carter
Minister of Conservation

Foreword

Whales and dolphins have always played a special role in the lives of New Zealanders and watching them continues to capture the imagination of locals and tourists alike.

Whilst whales and dolphins still face threats to their survival all over the world, New Zealand is reaping the rewards of the decision to cease whaling in 1964. A thriving tourism industry has grown up in the place of whaling. As this report shows, whale and dolphin watching is bringing significant and tangible benefits to people, coastal communities and tourism-related businesses around New Zealand.

As an international organisation working to protect whales and their habitats, IFAW is now widely recognised as a driving force behind the development of responsible whale watching worldwide. IFAW hosts international whale watching workshops, develops and promotes best practice and codes of conduct for responsible whale watching, produces public education materials and conducts groundbreaking research documenting the economic impact of this global phenomenon.

An assessment produced by IFAW in 2001 (Whale Watching 2001: World Tourism, Numbers, Expenditures and Expanding Socio-economic Benefits by Erich Hoyt) showed that by the dawn of this millennium, whale watching had become a \$1 billion industry attracting more than 9 million participants in 87 countries and territories around the world.

Since that time whale watching in New Zealand has continued to expand. This report documents the continuing growth in whale and dolphin watching-where 425,000 whale watchers contribute almost \$120 million to the economy of New Zealand annually. The numbers of people enjoying the spectacle of these magnificent animals has almost doubled since the late 1990's.

This report on whale watching in New Zealand confirms that whales are worth more alive than dead. We look forward to the continued development of this industry in a responsible way and to the growing benefits it brings to both animals and people.

Michael McIntyre
Asia Pacific Director, IFAW

Executive Summary

The New Zealand whale and dolphin watching industry has demonstrated significant growth in the six years since 1998.

Since the early nineties information has been collated to measure the size and financial value of whale watching on both a New Zealand and worldwide basis. The data was gathered in 1991, 1994 and 1998. This report provides current data for New Zealand in 2004. This has allowed recent trends in New Zealand whale and dolphin tourism to be measured.

In 2004, New Zealanders and international visitors made more than 425,000 visits to watch whales and dolphins, this is nearly double the 1998 estimate of 230,000 whale watchers. As an average, this translates to 11% per annum. This is higher than the 8% international inbound visitor growth rate.

The whale watching industry is also experiencing a rapid increase in sales on the back of rising visitor demand. Direct sales and expenditure on whale watching trips is estimated to have grown by an average annual rate of 15.6% per annum between 1998 and 2004. This is a strong sales outcome for any industry and this would probably position it as one of the fastest growing business sectors in New Zealand. As a consequence estimated direct expenditure on whale and dolphin watch tourism has more than doubled in the period 1998-2004 (\$NZ14 million to \$NZ33 million).

In 2004, estimated total expenditure (direct plus indirect expenditure) on whale watching tourism totalled almost \$NZ120 million. Within the total expenditure data, however, indirect expenditure has seen a slower growth, from \$NZ77 million to \$NZ86 million. This can largely be explained by a change in methodology between this report and the 1998 calculation, as well as a strong appreciation over this time of the New Zealand dollar against the US dollar (1998 data was calculated in \$US, 2004 data has been calculated in \$NZ). For these reasons, the extent and rate of growth of the industry in New Zealand is reflected most accurately by the figures based on participation numbers, rather than expenditure figures.

Whale watching has matured further as an industry in the period between 1998 and 2004. The structure of the New Zealand whale watching industry has now become apparent. A majority of whale watch activities are nature-based marine tourism including occasional whale and/or dolphin watching. This compares with other locations where there is a more singular emphasis on cetaceans. In order to reflect the multiple focus of New Zealand tourism, a low proportion of indirect expenditures related to the whale and dolphin watching have been counted - so that the estimate of both whale watchers and expenditures accurately reflects only those participants actually viewing cetaceans.

The data used in this research was gathered from a survey of New Zealand whale watch operators. This commercially sensitive data was combined with other sources from the tourism industry and government agencies to create an overall snapshot of the size of the whale watch industry.

Acknowledgments

A strong thank you is extended to all to the whale and dolphin watch operators, large and small, who participated in this industry evaluation. Without their survey responses and willingness to talk directly, this report would not have been possible. It is well understood that disclosing confidential business data in such a small industry is not done lightly so we extend our sincere appreciation and congratulate their vision in seeing the importance of such a report to their industry.

Great assistance was also provided by the officers and offices of the Department of Conservation, in particular thanks for the invaluable guidance provided by Rob Suisted and Mike Donoghue.

New Zealand's well organised system of reporting tourism data through the New Zealand Tourism Research Council has been a great source of information for this report.

Erich Hoyt's fine work in compiling the 2000 report on worldwide whale watching numbers remains the most critical source of data for this report as well as an inspiration by the sheer amount of work put into it and its clarity in presenting results.

Introduction

In 2001, IFAW released a special report authored by Erich Hoyt titled *Whale Watching 2001: Worldwide Tourism Numbers, Expenditures and Expanding Socioeconomic Benefits* (the 'Hoyt Report'). This report estimated the global whale watching industry in 1998 to be generating over \$US1 billion annually in tourism expenditures. At that time, this represented a surging annual growth rate of around 12.1% per annum for the industry.

New Zealand was witnessing rapid growth in whale watching tourist participation numbers in the second half of the 1990s. The Hoyt Report estimated that in 1998 there were 230,000 land-and sea-based whale watchers in New Zealand generating \$NZ 90.8 million (\$US48.7 million at 1998 exchange rate) in total expenditures (the sum of direct and indirect expenditures) for the New Zealand economy.

'Whale watching' consists of a mix of boat-based, aerial, and land-based activity and includes the viewing of all cetacean species including dolphins and porpoises. Included in this definition is 'viewing' as well as 'swimming with' cetacean activities. Seal watching and swimming with seals tours are not included in this report as these are not cetaceans.

IFAW requested that Economists@Large & Associates undertake a study to update these New Zealand whale watching figures to reflect 2004 levels of participation and economic value. From January to March 2005, research was undertaken to gather the appropriate data in order to define the status of the 2004 New Zealand whale watching industry and its pattern of change since 1998. This report sets out those results.

Methodology

To assess and evaluate the whale watch industry for the 2004 calendar year, data was collected and compiled by surveying whale watch operators and reviewing regional tourism research.

Whale watch operator survey

Whale watch operators were identified by desktop research including Internet searches, direct contact with regional tourism centres, the New Zealand Department of Conservation (DOC), universities, non-government organisations and local governments. The intention was to locate and contact a broad selection of operators conducting whale watch tours across the main whale watch regions of New Zealand. This was targeted mainly at sea-based operators but also included aerial operators and those running land-based whale watching.

Once identified and located, operators were contacted directly by phone or email in order to notify them of the research. A targeted survey was sent to all identified operators. The survey was designed to cover economic and demographic issues relevant to evaluating the size and value of the industry, as well as industry health and socioeconomic externalities. Socioeconomic externalities include community benefits from whale watch activities such as strengthened relationships between the public and the marine environment, subsidised educational whale watching trips for schools, marine mammal research underpinned by whale watch operators etc. The survey form is included as Appendix 1 of this report.

There were estimated to be approximately 90 operators involved in whale and dolphin watching activities across New Zealand, most being sea-based with two aerial operators. Of these, 59 were surveyed with a 25.5% response rate covering a proportional representation of all regions. This reflects a statistically significant proportion of the industry from which we were able to extrapolate regional data to the rest of the industry. Key regional specific patterns included:

- Length of peak season in each region (a significant proportion of whale and dolphin watching takes place in the peak tourist season, extending up to five months in some regions);
- Regional growth trends in whale and dolphin watching (see results section); and
- Proportion of cruises that were cancelled due to rough weather (in some regions, 50% or more of scheduled cruises are cancelled due to rough seas).

This data was collated and analysed in aggregate form on a regional and national level in order to provide results for this report whilst protecting the commercial confidentiality of individual operators.

Regional tourism research

New Zealand Government tourism offices, such as the Tourism Research Council New Zealand (TRCNZ) and Tourism NZ, as well as many regional tourism offices and information centres ('i-sites'), were contacted over the course of the research or their data gathered from online sources. Their data was used to varying degrees. Much of the aggregate tourism data used in this report is extrapolated from existing publications and assessed against operator survey outcomes. Reference to the original source has been made where appropriate.

Direct and indirect expenditure

In the calculation of the economic benefits of whale watching there are a range of issues that need to be clarified. The sale of tickets to travel on a whale watching vessel is a gross financial benefit resulting from whale watching. The purchase of food, accommodation and travel expenses (amongst others) to attend a whale watching event can also be attributed (subject to conditions) to whale watching on many occasions. These expenses can be called 'direct' expenditure. In the economic literature 'indirect' expenditure is undertaken when the businesses that earned the direct expenditure spends the revenue on goods and services as inputs to their activities. 'Induced' expenditure occurs when the employees of these business re-spend direct expenditure in the form of wages and salaries.

Estimation methodology for direct expenditure used in the Hoyt report is the same as that used in this report. The Hoyt Report, however, uses a different definition of indirect expenditure. That report, relying on conventions from previous assessments, defines indirect expenditure as expenditure that supports the whale watch trip such as accommodation, transport and food. Direct expenditure is expenditure on tickets and items directly related to the trip itself. We have adopted the same approach to allow direct comparison with that report and other analyses of the economic benefits of whale and dolphin tourism.

In the Hoyt Report a single multiplying factor was applied to direct expenditure levels in order to obtain indirect tourism expenditure levels from whale watching. We have been able to calculate more precise measures of the indirect expenditure since we have, for example, average per day expenditure data. The multiplying factors for this report were calculated on a region-by-region basis using the best available tourism data, accessed from the TRCNZ website "NZ Regions" section¹. At the time this analysis was conducted, tourism data was only available for the 2003 calendar year, and as such this was consistently applied to all regions. Use of 2003 expenditure data for 2004 estimates will lead to a slight underestimation of expenditure based on inflation in the intervening period which ensures that we have a relatively conservative estimate. This underestimation only further emphasizes the conservatism with which this study has been conducted.

Indirect expenditure results in this report more accurately reflect actual expenditure results due to the specific nature of the calculations. These calculations included considerations such as the low travel cost to many whale watch regions due to short distances (compared with, for example, Australian whale watching) and the often mixed nature of the cruises (i.e. when cruises are predominately scenic marine cruises, only part of the attraction to participants are whales or dolphins, so that only part of the indirect expenditure can be attributed to the whale watching industry).

The surveys and regional tourism data were collated, analysed and, where required, extrapolated from in order to calculate the tourism numbers and contribution of this industry to New Zealand's economy. Each operator provided information on visitor numbers and expenditure. This allowed an aggregate picture of tourism activity to be compiled. After estimating the length of the average whale watch visit it was possible to apply the daily expenditure data to estimate the amount of 'indirect' expenditure generated by each whale watch visitor.

In New Zealand, many of the whale watch operators are 'opportunistic', that is they only organise whale watch events when whales appear. Their core business is based around nature cruises with the potential to see whales or dolphins. In order to accurately reflect this, only the proportion of tourists who actually see whales are counted, based on proportions given to us by operators. In many of the sea kayak tours for example, the operators hold Department of Conservation marine mammal permits, though they only view cetaceans on 10% of their trips. In such a case, only 10% of their annual total participation rates are counted. In this way, all estimates of participation numbers in this report remain conservative estimates.

Methodological notes:

Direct expenditure	Direct expenditure is calculated in this report as the average adult ticket price paid to participate in the whale watch activity.
Indirect expenditure	<p>This has been calculated by estimating all other expenditures associated with participating in the whale or dolphin watch activity, e.g. food, transport to the whale watch location (excluding international air travel), film, souvenirs, accommodation. This figure was calculated on a region-by-region basis, in order to more accurately reflect the cost differences people are willing to incur in order to view whales.</p> <p>The basis for this calculation was varied. Sources included operator survey responses, publicly available national tourism data, tourism research papers and contact with regional tourism offices. Usually a combination of all sources was used in order to verify the final figures used. Where a choice between data was required, the more conservative estimate was always chosen so that an underestimate of the industry value is the inevitable result.</p> <p>In order to err on the conservative side, we have added a percentage factor to these indirect expenditures so that all money spent in the region by whale watch participants is not attributed solely to this activity. A tourist will come to a region for many reasons and as part of this will participate in whale watch activities. The expenditure of the tourist is therefore divided proportionally between the activities. The motivation to come to a region was assessed in the operator survey (question 15) in order to estimate the proportion of these indirect expenditures that could be attributed to the whale watch activities. In regions where sufficient data was not available, this factor was consistently extrapolated from other regional data.</p>
Dollars	All dollar figures given in this report are New Zealand dollars unless otherwise stated.
Historical data	Historical data represented in this report (such as in the Results section) where not referenced is taken from the Hoyt Report.
Whale watching	For the purposes of this report, whale watching refers to viewing cetacean species from land, sea or air. Importantly, this refers also to dolphin or porpoise watching activities (including 'swim with dolphin' tours). Seal interaction tours have not been included as these are not cetaceans.
Whale watcher	This refers to the number of whale watch trips undertaken in 2004 as opposed to the number of separate individuals having whale watching trips in 2004. It is assumed that this has very little effect on final whale watcher numbers due to only a very small proportion of people participating in whale watching greater than once in this time period. Ultimately, however, for the purposes of economic analysis, the key variable is the number of trips undertaken rather than the number of unique individuals who participate.
Whale watch operator	Those operators holding Department of Conservation marine mammal permits who may see whales, dolphins or porpoises (not seals) whilst undertaking a tour, whether dedicated solely to this task, or opportunistically whilst undertaking nature based tours. This can extend to sea-based, land-based or aerial whale watching.

Limitations

The aim of this project has not been to compile a comprehensive and exact database of all whale and dolphin watch operators in New Zealand and associated industry agents. The aim was to evaluate the growth in whale watching tourism in New Zealand. As a consequence the research was focused on estimating tourism numbers and expenditures by major geographic regions via a process of data collection and extrapolation.

In this way, the data presented does not represent the exact numbers of whale watchers, whale watch operators or expenditures, but rather represents best available estimates of the current industry values to the degree that a trend can be identified and compared against the Hoyt Report's 1998 figures.

The process of estimating valuations for an industry based on available secondary data and primary data is by nature flawed. Primary data is relied on to the extent that it is considered reasonable, however, there will be some margin of error on each data set. All efforts have been made to eliminate these errors by using a second source of data for verification wherever possible (such as two separate primary sources or a secondary source to verify a primary source).

As is necessary with economic modelling and statistical analysis, various assumptions are required throughout the process in order that the most accurate figures can be calculated with the available data. Where assumptions are made they have been stipulated. Where data sources are not disclosed, this is usually due to operator confidentiality constraints.

As explained, total expenditure figures in this report are based on a more comprehensive calculation methodology than those in the Hoyt report. As such, direct comparison between reports should be used for trend analysis rather than for exact expenditure growth. It was our aim to add further detail to the Hoyt Report's method of calculating these total expenditures in order to achieve an increasingly reliable set of data. For this reason, the annual growth rate has been calculated using the numbers of whale watchers across the time period as opposed to expenditure levels.

Furthermore there has been an appreciation of the New Zealand dollar compared to the US dollar over the last 15 years and, in particular, since the Hoyt report was published, (\$NZ1 = 1991, \$US0.5792; 1994, 0.5937; 1998, 0.5367; 2004, 0.664ⁱⁱ). Because the New Zealand dollar was considerably 'weaker' in 1998, the conversion from the Hoyt Report's US dollars to New Zealand dollars indicate a much slower increase in growth of expenditure figures. The best method for evaluating industry growth is the growth in revenue, given the available data and research resources, denominated in the currency most relevant to the industry and its host community, in this case New Zealand. Revenue denominated in NZ dollars represents the additional turnover that the industry has generated for New Zealanders in the intervening period since the Hoyt report. It also reflects, all other things being equal, a measure of the growth in demand in a manner recognisable to government, industry and the wider community. Due to the influence of inflation and other data like exchange rates, the participation numbers (the growth in visitor 'events'-called in this report 'whale watchers') is the most reliable indicator of consumer demand. It is due to these external influencing factors that we have chosen to measure growth primarily by participation numbers, not expenditure.

New Zealand Whale Watching: Summary of Results

Table 1. Whale watching numbers and expenditure data - New Zealand Dollars

Year	No. of Whale Watchers	Average Annual Growth Rate (%)**	Direct Expenditure (NZ\$)	Indirect Expenditure (NZ\$)	Total Expenditure (NZ\$)
1991	40,000	na*	\$ 1,890,539	\$ 12,612,224	\$ 14,502,762
1994	90,000	31%	\$ 6,568,974	\$ 14,485,430	\$ 21,054,405
1998	230,000	27%	\$ 13,979,877	\$ 76,826,905	\$ 90,806,782
2004	425,432	11%	\$ 33,264,087	\$ 85,943,921	\$ 119,208,008

*na - not available

** Annual Average Growth Rate - is calculated as the average percentage of a series of percentage growth rates that allows the data to grow steadily from the first survey period and achieve the result specified in the next survey period ('interpolated period').

Notes to Table 1. Currency conversion from the Hoyt report based on annual average currency exchange rates for the year concerned based on Reserve Bank of NZ data⁶.

Table 2. Whale watching numbers and expenditure data - US Dollars

Year	No. of Whale Watchers	Average Annual Growth Rate (%)**	Direct Expenditure (US\$)	Indirect Expenditure (US\$)	Total Expenditure (US\$)
1991	40,000	na*	\$ 1,095,000	\$ 7,305,000	\$ 8,400,000
1994	90,000	31%	\$ 3,900,000	\$ 8,600,000	\$ 12,500,000
1998	230,000	27%	\$ 7,503,000	\$ 41,233,000	\$ 48,736,000
2004	425,432	11%	\$ 22,477,154	\$ 51,861,003	\$ 72,338,157

*na - not available

** AAGR - is calculated as the average percentage of a series of percentage growth rates that allows the data to grow steadily from the first survey period and achieve the result specified in the next survey period ('interpolated growth').

Notes to Table 2. Currency conversion from the 2004 NZ data based on annual average currency exchange rates for 2004 based on Reserve Bank of NZ data⁶.

Table 1 summarises the New Zealand whale watching numbers and expenditure results for 2004. The historical data for 1991, 1994 and 1998 was provided by the Hoyt Report. The term 'whale watchers' refers to discreet whale watching events rather than unique individuals watching whales. However, anecdotally, it is considered that most whale watchers only attend one whale watching event in any one season.

In the third column we have calculated an annual average growth figure. This averages out the growth over the years between the survey periods (from 1991 to 1994 to 1998 to 2004) to provide a sense of the rate of increase in demand. The percentage changes over the three periods indicate a slowing down of the growth rate over time from an extraordinarily high rate of 31% in the 1991-94 period to more sustainable level in the past six years, remaining strongly at around 11% growth - a surging growth rate for around a decade and a half.

The whale watch data has only been collected sporadically (i.e. only for four times since 1991). As a result annual growth rate data can only be interpolated for the years between surveys in order to seek a comparative basis with other tourism statistics. This deceleration in the growth rate seems to indicate that the market is reaching maturity and could indicate that it is approaching a plateau in terms of the growth that can be maintained in whale watcher numbers. These results seem to correlate with operator feedback that has suggested some very strong competition in certain regions and even the chance that some regions are approaching saturation point. Cetaceans appear frequently in many locations around the New Zealand coastline, although the reliability and consistency of sightings needed to support whale and dolphin tourism means that only a certain number of areas are suitable. According to operator feedback, most of these areas are being utilised.

As previously noted, due to the strong appreciation of the New Zealand dollar against the US dollar over the last few years, the Hoyt report's US dollar figures for 1991, 1994 and 1998, when converted to New Zealand dollars, give the appearance of only slight gains in expenditure totals to 2004. However, this is more due to exchange rate appreciation than deterioration in the growth of turnover experienced by New Zealanders, and it is for this reason that growth estimates are based on whale watch participation rather than expenditure growth. For this reason Table 1 uses New Zealand dollars and Table 2 shows whale watch expenditure figures in US dollar terms. In broad terms these tables show the growth in the gross output (turnover) of the whale watch industry over an extended period.

New Zealand Whale Watching 2004

Table 3. Total New Zealand Whale Watching

Region	Operators	Whale Watchers			Direct Expenditure	Indirect Expenditure	Total Expenditure
		Boat-Based	Land-Based	Total			
North Is.	35	112,900	5,000	117,900	\$ 10,566,573	\$ 13,502,733	\$ 24,069,306
South Is.	55	265,232	42,300	307,532	\$ 22,697,514	\$ 72,441,187	\$ 95,138,701
Total:	90	378,132	47,300	425,432	\$ 33,264,087	\$ 85,943,921	\$ 119,208,008
1998	>50	230,000	Not given	230,000	\$ 13,979,877	\$ 76,826,905	\$ 90,806,782

Total New Zealand whale watchers 2004: 425,432

Annual % increase since 1998: 11%

New Zealand whale watch industry: an overview

The New Zealand whale watch industry has continued its strong growth over the period since 1998 averaging around 11% annual growth (see table 3). This growth has remained consistently above the average growth in international inbound visitors of 7.9% over the same time frame (see Table 4). This correlates with operator survey results indicating most whale watchers are international as opposed to domestic tourists.

Even with the very difficult market for global tourism in recent years, New Zealand continues to witness strong inbound tourism, with the only major disruption being a drop off of growth in 2003 to 2.9% (see Table 4)^v which could be attributed to the global reduction in travel in the immediate aftermath of the events of 11 September 2001 in the United States. Forecasts for the industry continue to predict strong growth up to 2010 (see Table 5). The Tourism Research Council of New Zealand (TRCNZ) predicts an average annual growth rate of international visitor arrivals of 5.8% for the period 2004 to 2010^{vi}. In this climate, the continuing high growth in whale watch numbers demonstrates a robust industry, continuing to grow at a higher rate than the broader tourism industry.

The industry's growth rate appears to be converging with that of the inbound tourism sector more generally. The growth in the whale watching industry is beginning to stabilise following the extraordinary expansion of the 1990s. Nevertheless, it could be expected that growth in the industry will continue to follow the forecast growth of inbound tourism from this point forward. There is the potential to continue the strong growth rates through the development of new land-based whale watching opportunities to further tap the cetacean resource of the nation's coastlines. Compared to Australia, for example, there are still a relatively small proportion of whale watchers undertaking land-based as opposed to boat-based whale watching.

This study did not attempt to ascertain whether there has been change in cetacean populations over the last six years. However, if populations do recover over time, there may be increasing consistency of cetacean viewing opportunities in new areas allowing an expansion of the industry, as has seemed to occur recently in Australia^{vii}. Such a development would help to maintain growth rates at their already high levels. Tables 4 and 5 have been sourced directly from the TRCNZ. Despite the slightly different titles, they provide a representation of the trend in international tourism as compared with the trend in whale watching visitation.

Table 4. Inbound Visitor Arrivals - Arrivals % change

Year	Growth Rate Each Year
1998	-
1999	8.3%
2000	11.2%
2001	6.9%
2002	7.1%
2003	2.9%
2004	10.9%
Average Annual Percentage Growth Rate	7.9%

Source: Tourism Research Council of New Zealand

Table 5. Forecast International Visitor 2004 - 2010

Year	Forecast Numbers Each Year
2004	2.34m
2005	-
2006	-
2007	2.74m
2008	-
2009	-
2010	3.12m
Average Annual Percentage Growth Rate	5.8%

Source: Tourism Research Council of New Zealand

New Zealand whale watch industry: The Regions

For the purposes of this report, whale watching regions have been grouped geographically to the North and South Islands. Smaller regional groupings have not been made due to the small number of operators and hence the risk that confidential operational data could be exposed. In the earlier Hoyt Report, there was no regional breakdown, which makes it difficult for any analysis to be undertaken of regional growth patterns. In general, however, it seems that it is the major whale watching centres, as mentioned below, that have witnessed the greatest continual growth in the past six years.

The North Island includes two major and long established whale watching areas - the Bay of Islands and Bay of Plenty - both attracting large numbers of tourists for dolphin watch cruises as well as a chance to swim with dolphins.

There remains a significant part of the North Island's coastline that has no whale watching, including most of the east coast, from Gisborne, Hawke Bay to Wellington in the south, and also most of the west coast. Nevertheless, there were a number of anecdotal reports that whales are occasionally seen, with orcas sometimes entering Wellington Harbour, as well as occasionally passing by the west coast near Paraparaumu. For these occasional visits, no formal whale watching is conducted, and due to their irregularity, no attempt has been made to estimate their economic impact.

The South Island was attracting more whale watching tourists in 2004 than the North Island - around 72% of New Zealand's whale watching tourists (see table 3). The main communities involved in whale watching are Kaikoura (with the only dedicated whale watching operator in the country focusing solely on large whales), Akaroa (attracting many to see the rare Hector's Dolphins) and Fiordland (well known for marine nature cruises on the Sounds as well as an opportunity to see dolphins). These whale watching communities have made a significant contribution to the growth of whale watching, with large, well-organised businesses which combined are capable of handling hundreds of thousands of whale watchers each year.

These and other examples are further discussed in the regional breakdown following.

Land-based whale watching

The results in this report show a limited number of informal, land-based whale watching tourists in New Zealand. The study has found that although there is diversity of cetacean species along most parts of coastal New Zealand (51 species of cetaceans in New Zealand waters), very few locations have become established cetacean viewing areas.

In many coastal towns across the country, cetaceans will be seen occasionally or even regularly, yet their appearance is inconsistent. Many of the tourist information centres that were contacted stated that they would sometimes have orcas entering their bay, large whales swimming past their shore, or dolphins that would visit the area. But the inconsistency of these sightings prevented the establishment of a land-based tourist attraction and hence their economic impact is difficult to define.

It seems however, that in many parts of New Zealand, the sighting of whales is a common event and it is suspected that the potential of land-based viewing is as yet unrealised. It was found in a similar study in 2004 on the Australian whale watching industry^{viii}, that land-based whale watching could, in certain circumstances, contribute significantly to the local economies of coastal communities. Due to the off-peak season winter arrivals of whales in many Australian coastal towns, they provide a much needed boost through indirect expenditures associated with tourist visitation. This occurred with minimal capital outlay, often only requiring a viewing platform along coastal cliffs and publicity of the fact that whales were present. This is an area that could be further developed by local councils and regional tourist offices in appropriate regions of coastal New Zealand. With a continual flow of tourists through a community to see whales from a viewing platform, the indirect economic benefits can very quickly become significant. In Australia at Warrnambool, Victoria, the local council has estimated that 118,000 visitors come to see whales at Logans Beach, creating a tourist attraction in the middle of the quiet winter period.

Estimates of the economic impact of informal land-based whale watching are made in this report only where the location serves as a regular attraction to tourists. The main areas for informal land-based whale watching were in Curio Bay in the Catlins, where people are often able to swim with the dolphins in the bay, the Greymouth point and breakwater on the West Coast of the South Island and Doubtless Bay on the North Island.

Operator number estimates

This report has attempted to estimate the number of operators currently working in the whale watch industry. From our calculations there were approximately 90 active whale and dolphin watching operators in New Zealand in 2004 out of approximately 110 Department of Conservation marine mammal permit holders. It was difficult to estimate these figures exactly because:

- The DOC marine mammal permits which control numbers of whale watch operators also include the viewing of seals which are not covered by this report. There was no clear statistic available as to how many of the approximately 110 permits were solely for seal watching and what proportion for cetacean viewing. Each permit has its own conditions which include viewing cetaceans, swimming with cetaceans, opportunistic viewing or dedicated viewing and these are administered by local DOC offices.
- Most operators in New Zealand are not dedicated cetacean viewing operators. In general, operators are boat-based nature cruises or kayak tours that include opportunistic viewing of cetaceans. Many of the operators therefore do not advertise as whale watch tours though they are permitted to view whales and dolphins if they appear.

- Numbers of operators fluctuate each year along with regional demand and whale numbers. In certain areas, operators may hold a DOC marine mammal permit but choose not to use it in a certain year if demand is not there.
- With many of the businesses being small, changes of ownership are also common with businesses entering and exiting the market regularly and permits being transferred.

Due to these reasons, a strict definition of a whale watch operator is very hard to achieve. However for the purposes of this report, whale watch operators are those holding DOC marine mammal permits who may see whales, dolphins or porpoises whilst undertaking a tour, whether dedicated solely to this task, or opportunistically whilst undertaking their nature-based tours. This can extend to sea-based, land-based or aerial whale watching. Informal land-based whale watching is generally not licensed by DOC (although some land-based permits for seal viewing do exist).

In this report, whale watch operator numbers should be used as an approximate guide only. The most important trends are derived from whale watch participation numbers.

Socioeconomic benefits

Feedback through operator surveys shows that cetacean research is well supported by many of the boat-based operators. Some of the cruises allow marine researchers on board; some have helped to develop codes of conduct for whale watching; some offer their boat in the off-season period for research trips. Many of the operators themselves have a background in marine mammal research or marine ecology which adds an educational element to the cruises. Many also give subsidised rates to local school groups.

The most significant socioeconomic benefit, though, is the indirect economic benefit of whale watching in regional communities. Many communities involved in whale watching are outside the major economic centres of New Zealand, and are providing employment as well as an often substantial injection of money into the local economy, from the tourist flow. Alongside successful whale watching ventures, many new businesses are flourishing, including cafes, restaurants, souvenir shops and accommodation.

Demographic trends from operator surveys showed that the majority of whale watchers were international tourists, with the USA and Europe the most heavily represented, and a close to even split of men and women participating. Based on limited survey feedback we estimated that 85% of visitors were international tourists. If this is the case the whale watch industry of New Zealand is clearly a part of 'Brand New Zealand' and an 'onshore' export earner.

The presence of whales, dolphins and porpoises in their wild, natural habitat is an additional and not insignificant attraction to tourists and locals alike in New Zealand. The chance that whilst walking along a beach you might be lucky enough to see a pod of dolphins playing in the surf, an orca hunting in a bay or a humpback whale breaching on the horizon contributes significantly to the reason why so many choose New Zealand as a travel destination.

This has certainly been realised by Tourism New Zealand, with their marketing of "100% Pure New Zealand" using images of whales and dolphins, and references to the chance meetings that may occur with them as you travel the coast line. This wildness and ability to interact with wild marine animals is a strong focus of the New Zealand 'brand'. Cetacean viewing can, therefore, be considered a motivating factor for some of New Zealand's 46 million international visitor nights and 63 million annual domestic visitor nights^{ix}. The exact contribution this makes to the economy is more difficult to assess and has not been calculated for this report.

New Zealand Regions

NB: Due to the small number of operators in many of the whale watch regions, only a North and South Island breakdown has been given in order to protect operator confidentiality.

North Island

North Island	Operators	Whale Watchers		Direct Expenditure (NZ\$)	Indirect Expenditure (NZ\$)	Total Expenditure (NZ\$)
		Boat Based	Land Based			
Totals	35	112,900	5,000 ^x	\$ 10,566,573 ^{xi}	\$ 13,502,733 ^{xii}	\$ 24,069,306

Total whale watchers: 117,900

Region definitions: Auckland, Doubtless Bay, Bay of Islands, Coromandel Peninsular, Great Barrier Island, Bay of Plenty, Taranaki

State of the industry

Boat-based viewing:

The Bay of Islands region attracts the most tourists wanting to participate in dolphin watch cruises and swim with dolphin experiences on the North Island. This area appears to be maximising its potential for whale watching with four main cruise companies and yacht charter companies that incorporate dolphin watching as well as sea kayaking companies^{xiii}. To assist in its promotion, the Bay of Islands has established a travel centre in Auckland. It is estimated that around 70% of North Island whale watching trips take place in the Bay of Islands.

The Bay of Plenty is the second largest region on the North Island (for whale watchers). The Hoyt report estimated that this region was receiving over 20,000 whale watchers in 1998 (along with the Bay of Islands). With currently four operators in the Bay, current research has found quite a low growth rate above this figure since 1998.

Auckland has one major operator conducting whale and dolphin watch cruises on the Hauraki Gulf. The Coromandel Peninsula has, at present, two operators taking dolphin watch cruises. Neither operator is undertaking swim-with the dolphins tours following a request to stop these by the local Maori community out of respect to animals they consider sacred^{xiv}.

Great Barrier Island has resident dolphins in its waters that are sometimes seen by sea kayak tours. A low estimate was made to incorporate these figures into the total whale watch numbers^{xv}.

Land-based viewing:

Five thousand land-based whale watchers were estimated for Doubtless Bay in the far north of the Island where dolphins are often seen from the beach. This is a conservative figure used merely to recognise that some land-based whale watching does exist as an attraction to tourists and will have an impact on the local economy^{xvi}. There is also an operator holding a DOC marine mammal permit in Doubtless Bay, but they were not operating in 2004.

Whales were also reportedly seen on many other areas of the coastline, even entering Wellington Harbour. However, there appear to be no other areas where people were consistently attracted by the chance of seeing whales or dolphins.

South Island

South Island	Operators	Whale Watchers		Direct Expenditure (NZ\$)	Indirect Expenditure (NZ\$)	Total Expenditure (NZ\$)
		Boat Based	Land Based			
Totals	55	265,232	42,300	\$ 22,697,514 ^{xvii}	\$ 72,441,187 ^{xviii}	\$ 95,138,701

Total whale watchers: 307,532

Region definitions: Marlborough Sounds, Nelson, Abel Tasman National Park, Golden Bay, Kaikoura, Akaroa and Lyttleton, Catlins, Fiordland, Haast, Greymouth, Westport.

State of the industry:

Boat-based viewing:

The often-cited industry leader in New Zealand whale watching regions, Kaikoura, remains a strong focus of local and national economic growth as a very important tourist attraction on the South Island. It continues to employ significant numbers of local people and the positive flow-on to the local economy has been well documented^{xix}. Kaikoura is also the only location in New Zealand with aerial whale watching, utilising both helicopters and planes. It is estimated that more than 150 new businesses have opened in the town as a result of the growth that has followed from whale and dolphin watch activities^{xx}.

Akaroa Harbour, near Christchurch, has a resident population of the rare Hector's Dolphins. Approximately five operators work from Akaroa and Lyttleton Harbour (at Christchurch) taking tourists on nature cruises, swim with the dolphins cruises and general harbour cruises.

The Canterbury region, which includes Kaikoura, Akaroa and Lyttleton Harbour is the largest beneficiary from whale watching activities in the country - approximately 80% of the South Island's whale watching activity is generated in the Canterbury region and in fact just over 60% of the country's whale watch cruises take place in this region. This offers significant stimulation to the economy of Canterbury, through direct and indirect expenditure and, as a result employment creation.

The Southland region (including Fiordland) attracted nearly two million tourists in 2003, about a quarter being international visitors^{xxi}. Fiordland attracts visitors for its long walks and cruises on the Sounds. There are many nature-based cruise companies operating in both Milford Sound and Doubtful Sound, some offering longer journeys to the southern sounds and to Stewart Island. Most of the operators on the Sounds hold DOC marine mammal permits (currently 11 permits in the region^{xxii}) and often see penguins, seals and dolphins. As it is only around 10% of cruises that see dolphins, it is this proportion of all cruise participants that was calculated as whale watch participants^{xxiii}. With the numbers travelling to this area being so large, this still forms a significant number.

Operators in the Doubtful Sound seem to be strong supporters of marine mammal research, undertaking voyagers with researchers, producing a voluntary code of conduct for marine mammal interaction in conjunction with the DOC, and one operator distributing part of its profits into a research fund^{xxiv}.

The west coast of the South Island has a small whale watch industry of approximately three operators spread out along the coast, from Haast to Westport. The challenge on this coast seems to be the rough weather and hence difficulty in getting out to see whales or dolphins. Research revealed that approximately four operators have left the industry in recent years, it seems due to this inaccessibility to cetaceans^{xxv}.

The northern coast spreads from Golden Bay, Abel Tasman, Nelson and into the Marlborough Sounds and Picton. There are a number of operators in this area holding DOC marine mammal permits. In the Golden Bay/Abel Tasman area alone, there are around 21 permit holders^{xxvi}. Most of these are permitted mainly for seal viewing in the Abel Tasman National Park and opportunistic dolphin watching, and they consist of water taxis, cruise boats and sea kayaks. There are only occasional sightings of dolphins and orcas in this area and as a result, the numbers of whale watchers are very low^{xxvii}.

Combined with the Marlborough Sounds where there is one main dolphin watch operator and around three opportunistic operators, the numbers of whale watchers in this region remain fairly low^{xxviii}. However, it is clear from this research and the authors recent visit to this region, that whales and dolphins do pose a sizable part of the attraction to the area. This is well utilised by promotional materials and marketing brochures for the region and its companies including images of dolphins and orcas.

Land-based viewing:

The sole operator in the Catlins region has recently ceased operating, however land-based dolphin viewing is a huge part of the attraction to Curio Bay, well known for its playful dolphins that are often seen swimming in the waves with people. In 2004, this attracted around 15,000 people to see and swim with the dolphins, with a recent influx of backpacker buses and new backpacker accommodation in the town^{xxix}.

A large proportion of visitors to Greymouth include in their visit a walk out to the point where dolphins are often seen. This is another simple example of land-based cetacean viewing that has minimal capital outlay, and relies purely on the suggestion of the tourist information centre to encourage people to stretch their legs before driving on. This is estimated to attract approximately 27,000 visitors each year and as an indirect result, an additional \$3 million is injected into the local economy^{xxx}.

Conclusion

This review of whale watching in New Zealand provides a snapshot of the industry, which allows comparisons with the previous assessment in 1998. The biggest growth areas are Kaikoura, Akaroa, Fiordland and the Bay of Islands. In addition, in some areas the peak season has now grown from three months to five months indicating strong growth in demand for whale watching and consequent supply of whale and dolphin watching activities.

The report also makes the following conclusions:

- The whale watching industry continues to make a significant contribution to the economy of New Zealand. In 2004 expenditure on whale watching tourism totalled almost \$NZ 120 million.
- Since the previous assessment of the state of the industry in 1998, whale watching tourism continues to expand and it is growing faster than the overall rate of growth in tourism in New Zealand.
- The industry is growing at a rate that would appear to place it, amongst the fastest growing industry sectors in New Zealand.
- The major whale watching centres (such as Kaikoura etc) have witnessed the greatest continual growth in the past six years.
- A significant proportion of whale and dolphin watching takes place in the peak tourist season, but the industry does help to extend the season outside of the peak months in some regions.
- Whale watching continues to provide employment and a substantial injection of money into the local economy of coastal communities around New Zealand.
- Many communities involved in whale watching are outside the major economic centres of New Zealand and whale watching continues to provide an alternative and growing source of income in these areas.
- There is potential for more growth in this industry as land based whale watching appears to be in its infancy.

End Notes

- i See Tourism Research Council New Zealand (TRCNZ), www.trcnz.govt.nz/NZ+Regions - the most recent available data sets were for 2003. This web resource provided for each region total visitor numbers, total expenditure and total visitor nights, from which an estimated average expenditure per visitor could be calculated.
- ii Reserve Bank of New Zealand, www.rbnz.govt.nz
- iii Reserve Bank of New Zealand, www.rbnz.govt.nz.
- iv Reserve Bank of New Zealand, www.rbnz.govt.nz.
- v TRCNZ.
- vi TRCNZ, "Forecast International Visitor Arrivals 2004 - 2010", www.trcnz.govt.nz/Topics/Forecasts+and+Trends/.
- vii International Fund for Animal Welfare (2004), The Growth of Whale Watching Tourism In Australia: An IFAW Report, Economists @ Large & Associates.
- viii Ibid.
- ix 46 million international visitor nights and 63 million domestic visitor nights in 2003, Tourism Leading Indicators Monitor, February 2004, Tourism Research Council, New Zealand. TRCNZ, www.trcnz.govt.nz.
- x Doubtless Bay Information and Booking Centre, Mangonui, personal communication, March 2005.
- xi Research found that the average ticket price for the North Island was \$93.60.
- xii Indirect expenditure levels have been calculated using TRCNZ data for Northland, Auckland, Bay of Plenty and Waikato regions relevant to the operation's location.
For Auckland region, a very low proportion of expenditure was attributed to the whale watching activity due to the accessibility and likelihood that tourists would not be coming to Auckland especially for whale watching.
For the Bay of Islands and Bay of Plenty, a higher proportion of average expenditure was attributed to the whale watch activity due to longer travel distances required to undertake this activity. Also, survey results indicate tourists participating in whale watching came with this as a major part of the reason to travel to these areas.
- xiii Operator survey responses.
- xiv Coromandel i-site Tourist Office, Whitianga, personal communication, March 2005.
- xv Great Barrier Island Tourist Information Centre, personal communication, March 2005.
- xvi TRCNZ - Northland Region, 3 million visitors to this region in 2003.
- xvii Research found that the average ticket price for the South Island was \$85.60.
- xviii Indirect expenditure levels have been calculated using TRCNZ data for Nelson, Marlborough, Canterbury, Southland and West Coast regions relevant to the operation's location.
For the Marlborough and Golden Bay regions, a very low proportion of expenditures were attributed to whale watch activities due to tourists not going to either area specifically for whale watching (as per results of survey).
For the Kaikoura and Akaroa regions, a much higher proportion of expenditure associated with a stay in the region was attributed to the whale watch activities, as many tourists visit these regions with whale watching as the main reason (according to survey responses).
West Coast and Fiordland have around 50% of the additional expenditures attributed to whale watching activities as these form only part of the reason for visiting these regions.
- xix Simmons, DG and Fairweather, JR (1998), Towards a Tourism Plan For Kaikoura, Tourism Research and Education Centre (TREC), Lincoln University, Report No. 10.
- xx Operator survey responses & ibid.
- xxi TRCNZ, www.trcnz.govt.nz.
- xxii Department of Conservation, Southland Conservancy, personal communication, March 2005.
- xxiii This ratio of whale watchers to cruise participants was estimated based on survey responses from operators in the Sounds stating that around 10% of cruises see dolphins. As most cruise participants are not there purely for whale watching, only a proportion of the total indirect expenditure was attributed to the whale watch industry (50% of the indirect expenditure of the 10% of cruise goers).
- xxiv Operator survey responses.
- xxv Operator survey responses, Tourism West Coast, personal communication, March 2005 & Greymouth Visitor Centre, personal communication, March 2005.
- xxvi Operator survey responses.
- xxvii Golden Bay i-site Tourist Office, personal communication, March 2005.
- xxviii Operator survey responses.
- xxix Waikawa Information Centre, Catlins, personal communication, March 2005.
- xxx Greymouth Visitors Centre, Greymouth, personal communication, March 2005. Estimated by tourist information centre that 35% of visitors walk to the point out of the 78,000 total tourists visiting the information centre. Indirect expenditure is based on TRCNZ data for average expenditure in the West Coast region, attributing 50% of that to whale watching as an activity that keeps tourists in town longer.

Appendix 1: Survey Form

Whale Watching Operator Survey Form: January 31 2005

Send reply to:

Please reply as soon as possible, to any of the details in the box->
(In order to minimise costs, we have not included reply paid envelopes - fax or email responses are preferred.)

The Value of Whale & Dolphin Watching in Aotearoa / New Zealand

By the International Fund for Animal Welfare: NEW Report

In 2001, IFAW prepared a report on the worldwide value of whale watching. At that time, 9,000,000 people a year were whale & dolphin watching annually in 87 countries, spending an estimated US \$1 billion dollars in total expenditures. The Aotearoa / New Zealand whale watching industry attracted over 230,000 visitors spending in the order of US \$48 million.

In 2004, IFAW updated these figures for the Australian whale watching industry, releasing the report *The Growth of Whale Watching Tourism in Australia*, including its tabling at the 2004 International Whaling Commission conference (this report is available online at www.ifaw.org.au).

IFAW is now updating the Aotearoa/New Zealand figures on the 2004 value of whale & dolphin watching for a report to be published in April 2005.

Can you please help by filling out this short form? This research will form vital information for the whale watching industry in Aotearoa/New Zealand by assessing the industry's contribution to the country's economy, current growth rates and identifying areas of opportunity. If your company or organisation offers whale / dolphin watching or swimming tours in more than one country, state, or region, photocopy the form and use one form per area.

For the purposes of this survey, whale watching refers to land, air or sea-based cetacean observation or "swim with" activities of all cetacean species, including whales, dolphins and purposes.

Please note that individual company figures will be kept strictly confidential. Please contact us if you have issues with confidentiality, or leave blank those questions considered commercially important. If exact figures are not known, please provide best estimates.

Please fill in name and contact details or attach current business card or brochure. If there is not enough room, please write on the back of this page.

Name _____ Company / Organisation Name _____

Mailing Address _____

City/ Town/State _____

Phone _____ Fax _____

email _____ website _____

SURVEY PART 1:

1. THIS IS THE MOST IMPORTANT QUESTION TO ANSWER (part A, B, C & D):

A. Estimated number of people your company took whale & dolphin watching in this one area only, for the year 2004: _____ (or if calendar year 2004 is unavailable, please advise which period your estimate covers).

B. For 1 HOUR to 1-DAY TOURS, what was the 2004 average amount spent per person for a whale or dolphin watching / swimming tour (please give average or usual adult ticket price in \$NZD)?

C. For MULTI-DAY or PACKAGE tours only, what was the 2004 estimated average amount spent per person: _____ How many days did the package include? _____ Was airfare included? _____

D. Additional amount per person (if known or can estimate) which your customers spend for travel, food, film, souvenirs, & accommodation incurred in process of going whale/dolphin watching and getting to the site (not including ticket price or package tour cost listed above) _____?

Please itemise estimates:

_____ \$ _____ \$
_____ \$ _____ \$

2. For each area, where your company/ organisation offers whale/ dolphin watching, please say where the tour departs from _____ (name of town or port).

3. Please tick the best description(s) of your 2004 tours:

- [] boat-based whale or dolphin watch tours;
- [] nature tours on which whales/ dolphins were often seen;
- [] kayak tours;
- [] swim with dolphin boat tours;
- [] land-based tours to see whales/ dolphins;
- [] other _____ .

4. How many employees work in your whale/dolphin tour business full time _____ part time _____?

5. What percentage (estimated) of your whale watchers are local _____ domestic _____ international _____?

If you know what countries (or regions) they come from, please give approximate percentages:

6. What proportion of whale watchers are: Female _____? Male _____?

7. What proportion of whale watchers are in the following age brackets (please provide approximate percentages):

- <18? _____
- 19-25? _____
- 26-35? _____
- 36-45? _____
- 46-59? _____
- 60+? _____

- 8a** Total number of companies/ organisations offering whale/ dolphin watching in your area _____?
- 8b** Estimated number of whale/ dolphin watchers (domestic & foreign tourists) from all companies/ organisations in 2004 in your area (including your own business) _____?
- 9.** Is your company affiliated with or has an agreement with any type with a tour operator who brings whale watching tourist groups to your company (i.e. bus company, travel agencies etc.)? Y / N Name of company? _____ Nature of arrangement? (please explain in detail) _____

 What % charge would you expect to be placed on top of your standard ticket prices?

- 10.** Please tell us the number of new businesses in your community (souvenir shops, tour companies, restaurants, etc.) due to whale/ dolphin watching tours in your area? _____ since 19__
- 11.** What is your estimate of the capital value of your whale watching business? \$ _____
- 12.** What is your estimate of the average cost of each whale watching tour per person? (Average cost includes normal operating expenditure, cost of finance for working capital and depreciation but does not include taxation or payments of dividends to the owners or profit retained for re-investment in the business). \$ _____
- 13.** Is it possible to compute/ estimate the annual rate of return on initial investment for your whale watching business? _____% per year for period 19__ to 200__.
- 14.** Please state or estimate the number of businesses in your community which would not exist if whale watching had not started in your area? _____ If you can, it would be very helpful to tell us:
- number of new souvenir shops? _____
 - number of new restaurants? _____
 - number of new hotels/motels? _____
 - number of new rooms (incl. guest houses & B&B) _____
 - number of new tour companies? _____
 - number of other new shops (please describe as many as you can)

- 15.** How many (or the percentage) of your whale watch customers:
- come to your community with whale/ dolphin watching as the main reason? _____
 - come to your community with whale/ dolphin watching as part of the reason for their trip?

 - went whale/dolphin watching spontaneously (impulsively decided on site)? _____
 - how were you able to ascertain this information?

- 16.** If customers came as part of a trip, do you have an estimate of the amount of time spent elsewhere on that trip on average and what activities they undertook?

17. Please tell us other community benefits that have come from whale watching, including social, educational, economic or environmental benefits. (For example, benefits traceable to whale watching include the designation of a marine protection area, the building of a community centre or dock, scientific research of local marine waters, tour boats taking school classes whale watching at reduced or free rates etc.)

18. Are there any available socioeconomic or other tourism reports on whale watching for your area, which describe the social and economic impact of whale/ dolphin watching on your community, region or state? Please tell us how we might obtain copies of these reports or other documents. If there is an economist, human geographer or tourism consultant who is analysing the value of whale watching in your area, we would be pleased to be put in contact.

End of Survey. Thank you greatly for your participation.

We would be more than happy to provide you with a copy of the final report.

[] Tick here if you would like to receive the final report.

Please return the survey by any of the means listed on page 1 of this survey as soon as possible.

Notes



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