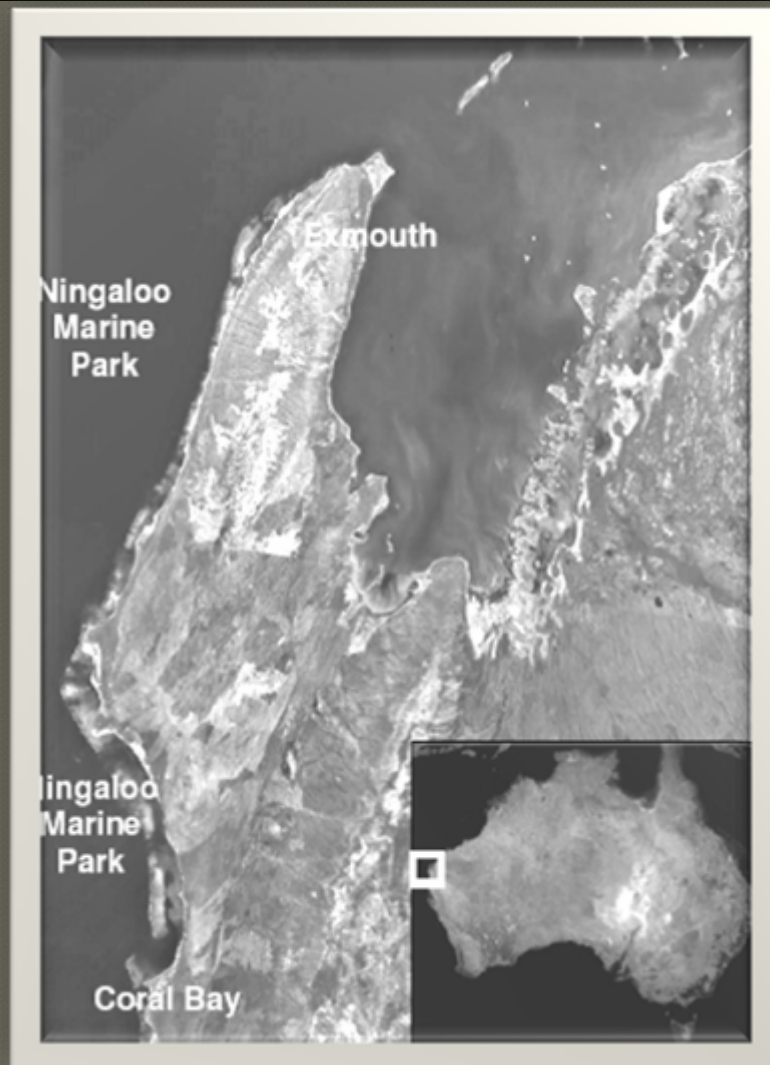


Visitor Expenditure in a Whale Shark Tourism Industry: the Affect of Consolidation

Catlin, Jones, Norman, and Wood

The Ningaloo Region



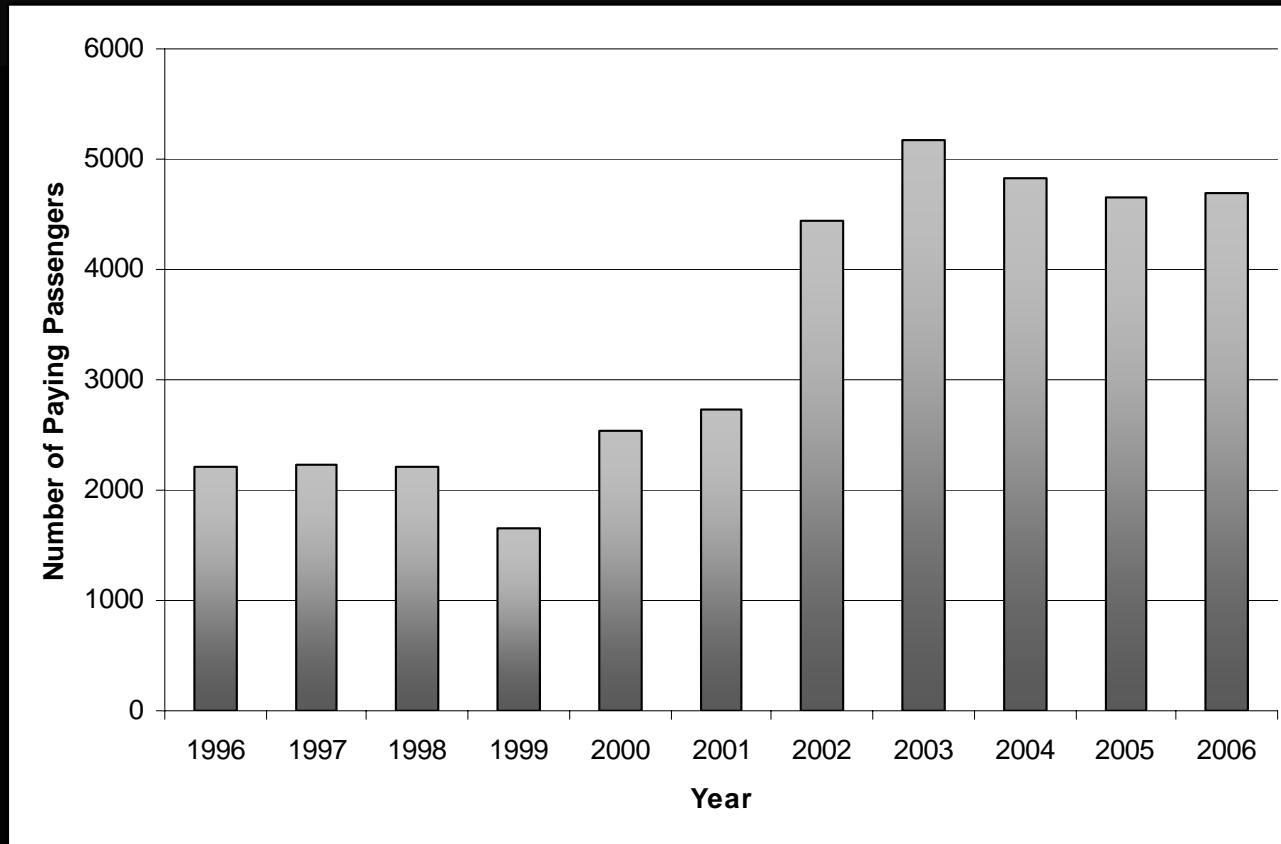
Tourism in the Region

Place of Origin	1989-1991 (%)	1997-2002 (%)	2003 (%)
Western Australia	85	42	48
Interstate	8	15	13
International	4	43	39

Tourism Icons

- ◉ Whale sharks are 'tourism icons'
- ◉ Providing the region with a recognisable brand and point of difference from its competitors

Growth of Whale Shark Tourism



Economic Measure

- Pearce (1981, p. 240) argues that establishing a figure for direct expenditure provides the “first indication of the significance of tourism to a national, regional or local economy”.

Expenditure Categories

	Median Trip Expenditure	Mean Trip Expenditure	Per Night Expenditure
Travel	63.98	130.32	27.11
Accommodation	115.16	186.39	38.78
Food and Drink	95.97	130.42	27.13
Activities	319.89	363.54	75.63
Equipment	15.99	45.07	9.38
Other	22.39	38.53	8.02
Total	633.38	894.28	186.04

Calculation

● *Total visitor expenditure = Average daily
visitor expenditure x average length of
stay x total number of participants*

● AU \$5 971 108

Expenditure Based on Trip Intentions

	Trip Expenditure	Number of Nights	Per Night Expenditure
Stayed the same amount of time (n=86)	860.37	5.4	158.49
Stayed less time (n=184)	861.30	5.0	172.62
Would not have visited the region (n=174)	952.10	4.3	219.28

Substitution Value

● **\$2.4 to \$4.6 million**

Why are Our Figures so Different?

- ◉ Davis et al 1997 \$4.7million (\$2370/prsn)
- ◉ Newman et al 2002 \$10million
- ◉ Fowler 2000 \$12million
- ◉ Dept Enviro and Cons 2005 \$12million

Increased Visitor Numbers

- Since 1995 participant numbers have substantially increase during the official whale shark season in addition the first 'complete' annual headcount was undertaken in 2006 and is employed in this study. Therefore, although participant expenditure in the region is lower, the total number of participants is larger.

Comparison of Ningaloo Surveys using updated data

Source	Davis et al.	Our Study	Carlsen & Wood
Survey Subjects	WS participant	WS participant	All tourists
Year of Data Collection	1995	2006	2003
Expenditure per trip	\$ 3,147	\$ 894	\$ 791
Average Stay	N/A	4.8 nights	9 days
Total Expenditure	\$ 6.2 mil.	\$ 6.0 mil.	\$ 149 mil.
Av. Age	32.7	34.4	N/A
Japanese	42.3%	6.7%	N/A
West Australian	N/A	24%	48.2%
Australian	34.9%	48.8%	60.7%
International	65.1%	51.2%	39.3%

* Expenditure data is adjusted to June 2006 dollars using the ABS CPI

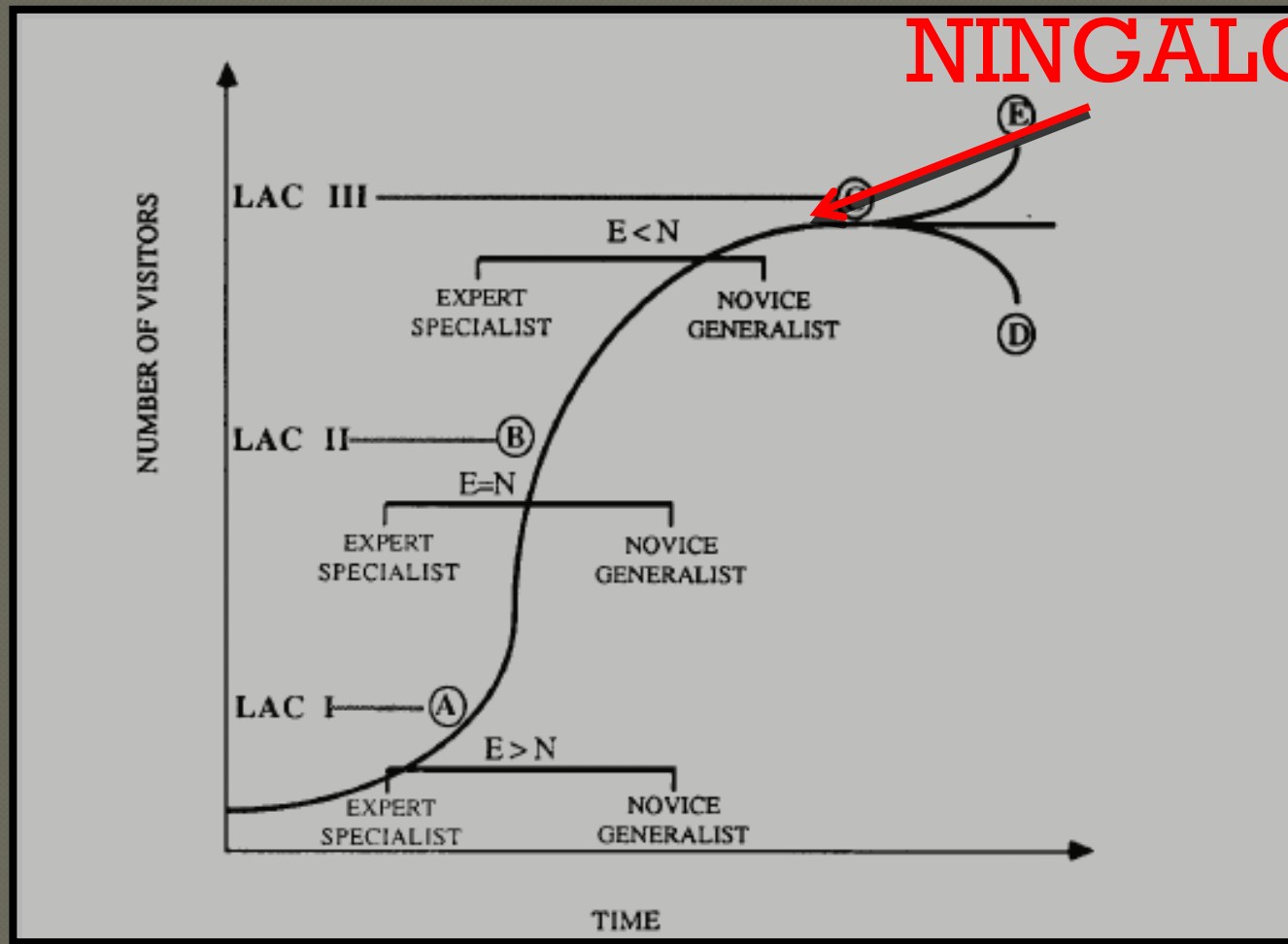
Variation Between the Studies

- The largest discrepancy between the Davis et al. study and our findings is the amount of participant expenditure per trip.
- One possibility is that the decrease in the proportion of international whale shark tour participants has impacted upon the total expenditure

Shift in the market

- the change in expenditure is likely due to a shift in the whale shark tourism market from the periphery to the mainstream amongst both domestic and international visitors as the industry has reached the 'consolidation' phase.

Duffus and Dearden's Wildlife Tourism Concept



Supporting Research

● Catlin and Jones (2006):

- a much greater proportion of domestic tourists;
- an increased tolerance to crowding;
- a greater distribution of ages; and
- a greater focus on the service elements of the experience

Specialist v Generalist

- Specialists spent over \$90 per trip and over \$47 per day more than generalists
- The implications for forecasting here is that, as a wildlife tourism industry gains popularity, the individual expenditure of tourists declines and the experience becomes more popular for a general public

Tourism is Dynamic

- Our research suggests that using old data to measure wildlife tourist expenditure needs to take account of the development of the industry
- Further research on expenditure changes due to industry growth would greatly assist managers in tourism planning and regulation

Further Information

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