

## **WHALE WATCHING WORLDWIDE**

### ***Tourism numbers, expenditures and expanding economic benefits***

#### **Executive Summary — June 2009**

**Australia** introduces this document for circulation as it provides useful information and data to support consideration of the issue of whale watching

# Whale Watching Worldwide

Tourism numbers, expenditures and  
expanding economic benefits

A special report from the International  
Fund for Animal Welfare

June 2009

EXECUTIVE SUMMARY VERSION

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*Whale Watching Worldwide: Tourism numbers, expenditures and economic benefits*  
A special report from IFAW – the International Fund for Animal Welfare

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The opinions expressed in this publication are those of the author/s and do not necessarily reflect the views of IFAW. This report is based on data gathered and analysed by Economists at Large through interviews with operators, government, non-government and other stakeholders as well as secondary data reviews. The findings of this report are dependent on that data which was available at the time of research.

## Executive Summary

Ten years after the last global review of the worldwide whale watching industry, the International Fund for Animal Welfare has commissioned Economists at Large to undertake an update report to measure the change in this industry across the world since 1998. This report presents the findings of a 2008 review of the global whale watching industry<sup>1</sup>.

In 1998, the global whale watching industry was already well established, with over 9 million whale watchers across 87 countries and territories spanning every continent of the globe. At that time, the industry was estimated to generate over US\$1 billion in total expenditure<sup>2</sup>.

Ten years later, in 2008, we see an industry that has grown strongly, expanding across more countries and territories, and continuing to develop in those countries with long established industries.

In 2008, 13 million people participated in whale watching in 119 countries and territories, generating total expenditure of \$2.1 billion.

Furthermore, an estimated 3,300 operators offer whale watching trips around the world. The operators employ an estimated 13,200 people.

The most recent decade has been tumultuous for global tourism, with the terrorist attacks of 9/11, the impact of SARS (severe acute respiratory syndrome), and the effects of various wars. This resulted in flat or negative growth globally in international inbound tourism in four of those last ten years.

Across the globe, the whale watching industry has grown at an average rate of 3.7% per year, comparing well against global tourism growth of 4.2% per year over the same period.

But the growth rate of whale watching at a global level tells only part of the story. At a regional level, average annual growth has occurred well above growth in tourism rates in five of the seven regions in this report: Asia (17% per year), Central America and the Caribbean (13% per year), South America (10% per year), Oceania and the Pacific Islands (10% per year) and Europe (7%), evidence of strongly emerging industries.

Concomitantly, the economic activity generated by whale watch tourists has also grown. In 2008, global ticket sales for whale watching trips generated \$870 million (direct expenditure), with subsequent indirect expenditure attributed to whale watching generating \$1.2 billion resulting in total whale watching expenditure of \$2.1 billion.

Clearly, the industry has grown from its place servicing a select niche tourism market, to one that in parts of the globe has hit the mainstream.

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<sup>1</sup> Whale watching in this report includes all wild cetaceans – whales, dolphins and porpoises.

<sup>2</sup> All dollars in this report have been converted to US dollars.

Region	Whale watchers		Regional AAGR	Number of countries		2008 Direct Expenditure millions	2008 Total Expenditure millions
	1998	2008		1998	2008		
<b>Africa and Middle East</b>	1,552,250	1,361,330	-1.3%	13	22	\$31.7	\$163.5
<b>Europe</b>	418,332	828,115	7.1%	18	22	\$32.3	\$97.6
<b>Asia</b>	215,465	1,055,781	17.2%	13	20	\$21.6	\$65.9
<b>Oceania, Pacific Islands and Antarctica</b>	976,063	2,477,200	9.8%	12	17	\$117.2	\$327.9
<b>North America</b>	5,500,654	6,256,277	1.3%	4	4	\$566.2	\$1,192.6
<b>Central America and Caribbean</b>	90,720	301,616	12.8%	19	23	\$19.5	\$53.8
<b>South America</b>	266,712	696,900	10.1%	8	11	\$84.2	\$211.8
<b>GLOBAL TOTAL:</b>	9,020,196	12,977,218	3.7%	87	119	\$872.7	\$2,113.1

#### The regions:

North America remains the world's largest whale watching destination, with over 6.2 million whale watchers in 2008 – nearly 50% of the world's whale watchers. However, annual average growth has slowed to just under 1.5% per annum and proportion of the globe's whale watchers has dropped from 60% in 1998. Unsurprisingly in an area with some of the earliest commercial whale watching in the world, this report finds a very mature industry spread across all North American countries, accounting for a total of \$1.2 billion in expenditure.

Oceania, Pacific Islands and Antarctica have continued to establish themselves as global whale watching locations, the region having grown at nearly 10% per year and accounting for nearly 2.5 million whale watchers in 2008 (20% of global whale watchers). 17 countries and territories now offer whale watching (12 in 1998) from Antarctica to Guam, and across the South Pacific, including the largest regional industries in Australia and New Zealand. Whale watching accounted for nearly \$330 million total expenditure in this region.

Africa and the Middle East region is also now a substantial player in the global whale watching industry, accounting for over 1.3 million whale watchers (10% of global whale watchers) and \$164 million total expenditure. The industry has shown dramatic expansion in extent, increasing from 13 to 22 countries offering whale watching in the region. However, this is also the only region that has decreased in numbers of whale watchers since 1998 at -1.3% per year, mainly due to a sizeable reduction in whale watchers in the Canary Islands. Excluding this one off change, the industry continues to grow strongly across the rest of the region.

Asia has emerged as the world's important new whale watching destination - growing five-fold from 220,000 whale watchers in 1998 to over 1 million in 2008 (8% of global whale watchers), and accounting for \$66 million in total expenditure. From 13 countries in 1998, whale watching activities are now offered in 20 countries from the Black Sea to Japan, having grown at an astonishing 17% per annum since 1998.

Europe's whale watchers have doubled in numbers across the decade averaging 7% growth per annum, which is somewhat surprising for a region with a mature tourism industry. Whale watching has expanded by four new countries to a total of 22, and generates nearly \$100 million in expenditure, from Cyprus to Greenland. Europe accounts for 6% of global whale watchers.

South America too is showing strong growth, at an average of over 10% per annum. In 2008, nearly 700,000 people undertook whale watching across the continent, in 11 countries (5% of global whale watchers).

And finally, Central America and the Caribbean. Proportionally a smaller region by numbers (300,000 in 2008; 2% of global whale watchers), this is nevertheless a region that has emerged with substantial growth over the last decade of 13% each year and expanding to 23 countries from 19 in 1998.

**Largest and fastest:**

In 1998, it was reported that three countries could claim to have taken over one million people whale watching in one year. The ‘Million Watch Club’ comprised the USA, Canada and the Canary Islands. In 2008 we see that club still remains at only three with Australia joining the USA and Canada, with the US the largest of these by far taking nearly 5 million whale watchers in 2008. Canary Islands, although maintaining a large industry, falls beneath one million whale watchers in 2008.

The list of countries with over 500,000 whale watchers adds the Canary Islands, South Africa and New Zealand (table of top 10 whale watching locations by number of whale watchers below).

Country	Whale watchers in 2008	Percentage of total global whale watchers
USA	4,899,809	38%
Australia	1,635,374	13%
Canada	1,165,684	9%
Canary Islands	611,000	5%
South Africa	567,367	4%
New Zealand	546,445	4%
China (Mainland)	307,000	2%
Argentina	244,432	2%
Brazil	228,946	2%
Scotland	223,941	2%
<b>TOTAL</b>	10,506,620	81%
<b>GLOBAL TOTAL</b>	12,977,218	100%

Countries with the fastest growing whale watching industries (based on average annual growth rate calculations) are led by mainland China (107% growth per annum since 1998), Maldives (86%), Cambodia and Laos together (79%), St. Lucia (74%), Madeira (73%), Venezuela (58%), Costa Rica and Nicaragua (both 56%) and Panama (53%).

**Long-term growth:**

The industry’s substantial growth in the last ten years is a continuation of a much longer growth pattern. Data has been estimated for the whale watch industry since 1981 (Hoyt, 2008) and when assessed together, the numbers show an impressive continuing strength in the global whale watching industry, albeit with growth slowing in the recent decade compared to its early explosion in the 80s and 90s.

Year	Number of whale watchers	Average annual growth rate	Direct Expenditure millions	Total Expenditure millions
1981	400,000		\$4.1	\$14
1988	1,500,000	20.8%	\$11 – 16	\$38.5-56
1991	4,046,957	39.2%	\$77	\$317.9
1994	5,425,506	10.3%	\$122.4	504.3
1998	9,020,196	13.6%	\$299.5	\$1,049
2008	12,977,218	3.7%	\$872.7	\$2,113.1

### Regional Employment:

As detailed in the table below, the global whale watching industry is currently estimated to support over 13,000 jobs worldwide. A large proportion of these jobs are likely to be seasonal, particularly in those locations where the whale watching industry is based on migratory patterns. Where whales or dolphins are resident (which is the case in many dolphin watching locations in particular), the jobs are more likely to be permanent. The lack of permanency of employment is not uncommon in tourism-reliant coastal communities around the world, where much of the local economic activity tends to be based on peak tourist seasons.

Of note is the complementary role the whale watching industry plays in many global coastal communities. In many cases, whale watching employment supplements other industries such as fishing or general nature cruises, with operators undertaking other occupations out of whale season. In some locations, the industry helps to balance out the seasonal fluctuations of coastal tourism industries, where whale arrivals peak in traditionally off-peak seasons such as mid-winter.

Region	Number of jobs supported by whale watching	Number of whale watchers per employee
Africa and Middle East	1,065	1,060
Europe	794	867
Asia	2,191	1,078
Oceania and the Pacific Islands	1,868	543
North America	6,278	750
Central America and Caribbean	393	2,051
South America	615	1,272
GLOBAL	13,205	1,183

### Conclusion:

These top line results only begin to reveal the strength of the industry. It is the stories at the local level where we see the best of what this industry can achieve. The picture that emerges is of an industry that provides a new model for use of natural resources - an industry that relies on whales in a non-extractive way. That, when well managed, can be truly sustainable and provide a sharp contrast to the days when whales were seen solely as a resource to be hunted and consumed.

The results in this report make the case that the protection of whales in their natural environment has driven a secondary benefit of significant economic activity in thousands of communities around the world.

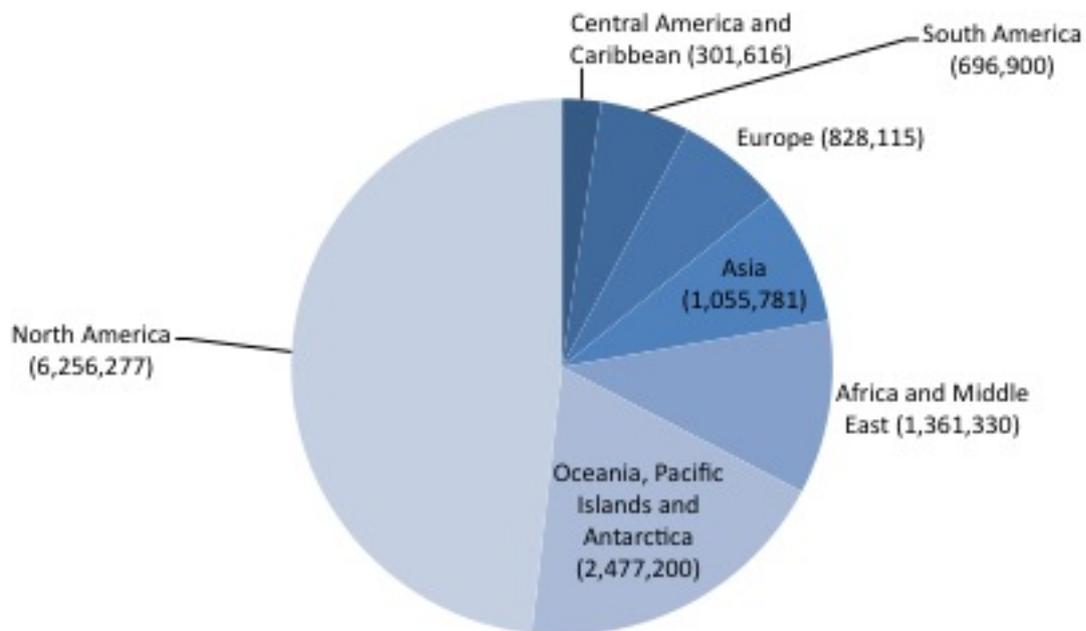


## GLOBAL WHALE WATCHING 2008

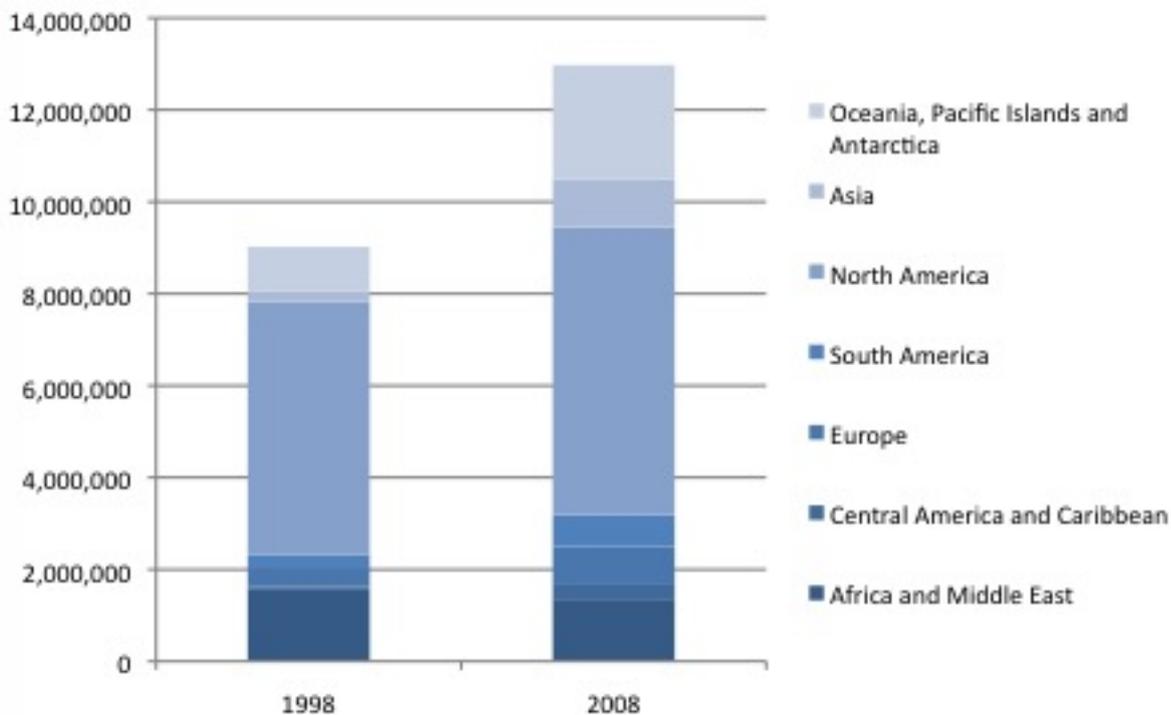
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<b>GLOBAL TOTAL:</b>	9,020,196	12,977,218	3.7%	87	119	\$872.7	\$2,113.1

NOTE: Figures for 1998 may differ slightly when compared to Hoyt 2001 due to slight realignment of regions – this is the case for Asia and Africa.

### Global Number of Whale Watchers



### Global Whale Watching Growth



## Regions

The following section of the report outlines findings of this global whale watching study by region and country/territory. The regions are set out in the order as below, with countries organised alphabetically. Whale watching countries with large numbers have been divided into states or local regions for a more detailed overview.

### Africa and Middle East

Year	Number of whale watchers	AAGR	Number of countries	Direct expenditure	Indirect expenditure	Total expenditure
1991	46,150	N/A	3	\$1,150,000	\$2,996,000	\$4,146,000
1994	282,550	82.9%	8	\$7,379,000	\$19,268,000	\$26,647,000
1998	1,552,250	53%	13	\$19,022,000	\$115,882,000	\$134,904,000
2008	1,361,330	-1.3%	22	\$31,681,343	\$133,736,516	\$163,475,695

### Europe

Year	Number of whale watchers	AAGR	Number of countries	Direct expenditure	Indirect expenditure	Total expenditure
1991	158,763	N/A	8	\$2,161,000	\$3,429,000	\$5,690,000
1994	204,627	8.8%	16	\$4,123,000	\$17,862,000	\$21,985,000
1998	418,332	19.6%	18	\$11,048,000	\$34,981,000	\$46,029,000
2008	828,115	7.1%	22	\$32,346,906	\$65,290,135	\$97,637,041

### Asia

Year	Number of whale watchers	AAGR	Number of countries	Direct expenditure	Indirect expenditure	Total expenditure
1991	10,992	N/A	2	\$371,000	\$4,377,000	\$4,748,000
1994	73,192	88.1%	12	\$3,887,000	\$20,714,000	\$24,601,000
1998	220,465	31.7%	13	\$7,735,000	\$36,969,000	\$44,704,000
2008	1,055,781	17.2%	20	\$21,573,315	\$44,365,015	\$65,938,330

### Oceania, Pacific Islands and Antarctica

Year	Number of whale watchers	AAGR	Number of countries	Direct expenditure	Indirect expenditure	Total expenditure
1991	376,375	N/A	3	\$10,051,000	\$36,518,000	\$46,569,000
1994	540,200	12.8%	6	\$18,622,000	\$49,088,000	\$67,710,000
1998	976,833	15.9%	12	\$35,494,000	\$87,766,000	\$123,260,000
2008	2,477,200	9.7%	17	\$117,180,363	\$210,688,889	\$327,869,252

## North America

Year	Number of whale watchers	AAGR	Number of countries	Direct expenditure	Indirect expenditure	Total expenditure
1991	3,430,225	N/A	3	\$46,230,000	\$179,045,000	\$225,275,000
1994	4,074,195	7.9%	4	\$65,791,000	\$227,606,000	\$293,397,000
1998	5,500,654	7.8%	4	\$194,575,000	\$399,692,000	\$594,267,000
2008	6,256,277	1.3%	4	\$566,200,198	\$626,352,749	\$1,192,552,947

## Central America and Caribbean

Year	Number of whale watchers	AAGR	Number of countries	Direct expenditure	Indirect expenditure	Total expenditure
1991	2,034	N/A	6	\$1,524,000	\$210,000	\$1,734,000
1994	19,212	111.4%	12	\$3,526,000	\$3,831,000	\$7,357,000
1998	90,720	47.4%	19	\$5,968,000	\$5,117,000	\$11,085,000
2008	301,616	12.8%	23	\$19,500,388	\$34,267,141	\$53,767,529

## South America

Year:	Number of whale watchers	AAGR	Number of countries	Direct expenditure	Indirect expenditure	Total expenditure
1991	22,418	N/A	5	\$15,447,000	\$11,245,000	\$29,692,000
1994	231,530	117.8%	8	\$19,117,000	\$43,464,000	\$62,581,000
1998	266,712	3.6%	8	\$25,667,000	\$69,141,000	\$94,808,000
2006	582,547	10.3%	10	\$63,614,528	\$102,367,103	\$165,981,631
2008	696,900	9.2% <sup>3</sup>	10	\$84,210,754	\$127,576,320	\$211,787,074
Projection						

<sup>3</sup> AAGR for ten years 1998 to 2008 is 10%; for 2006-2008 it is 9.2%

## Whale Watching and the International Whaling Commission – a Brief History

Vassili Papastavrou, IFAW

### Summary

The International Whaling Commission has addressed the subject of whale watching since 1975. As the only global body responsible for the conservation of whales, the IWC has provided a focus for all aspects of the discussion regarding whale watching including the scientific, legal, socio-economic and educational aspects. The IWC has provided the function of a clearing house for the collation, analysis and dissemination of information on whale watching to both member and non-member governments.

The IWC has performed a critical function of providing a framework both to help coastal states draft regulations and guidelines and to provide a forum for peer review of the scientific aspects of issues arising from whale watching. This has contributed to the overall sustainability of whale watching and ensuring that the economic and educational benefits are capitalised upon.

### Chronology

**1975** Concerns were expressed within the IWC Scientific Committee that excursion boats entering Scammon and other breeding lagoons in Mexico, which had started in 1970, might be detrimental to the whales<sup>4</sup>.

**1976** IWC Scientific Committee asked the Commission to request the US and Mexican Governments to “...establish regulations to reduce harassment of (gray) whales in all their breeding areas”<sup>5</sup>. The Commission responded by adopting a resolution, proposed by Denmark, that noted the Committee’s recommendation and that “the gray whales are generally protected”, and recommended “... that contracting governments establish such regulations as soon as possible”.

**1982** The USA proposed at the IWC that there should be a special meeting in the northern hemisphere spring of 1983 “to address the non-consumptive utilisation of cetacean resources, giving consideration to research, recreation, education and cultural aspects”. The IWC agreed to co-sponsor such a meeting<sup>6</sup>.

**1983** First whale watching conference “Whales Alive” held in Boston, co-sponsored by the IWC and with participation of the IWC Secretary as an observer.

**1984** Outcome of conference was brought to the IWC, including that the new issue of non-consumptive use should be considered by the IWC.

**1993** First whale watching resolution adopted by IWC in 1993, establishing a Working Group on Whale Watching to meet prior to the 1994 IWC and, *inter alia*, “assemble and summarise information about whale watching from both party and non-party states”<sup>7</sup>.

**1994** Whale watching working group meets just prior to the IWC under the chairmanship of F. von der Assen (Netherlands). The main document under consideration was the report prepared by the Secretary on the basis of overviews provided by 11 member governments namely: Argentina, Chile, France, Ireland, Mexico, New Zealand, Oman, Spain, Sweden, UK (including British Virgin Islands, Turks & Caicos Islands and other British territories), and USA. There were in addition late papers from Japan, Brazil, Australia and Norway.

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<sup>4</sup> Rep. Int. Whal. Commn 28: 209-11, 1976

<sup>5</sup> Rep. Int. Whal. Commn 29: 68, 1977

<sup>6</sup> Rep. Int. Whal. Commn 33 31-2, 1983

<sup>7</sup> Rep. Int. Whal. Commn 44: 33-4, 1994

**1994** Resolution on whale watching adopted which *inter alia* requests the submission of information by contracting parties on whale watching, requests advice from the Scientific Committee in setting guidelines, and requests the IWC to keep under review all aspects relating to whale watching.

**1995 – Present.** The IWC Scientific Committee has addressed a large variety of scientific issues concerning whale watching. A standing Whale Watching Sub-Committee of the Scientific Committee was set up in 1998 from the Working Group set up in 1995. Matters addressed include:

- Identifying and assessing the possible effects of whale watching operations on cetaceans/whales;
- Examining current status of methods of assessment of impacts, including assessment of behavioural change;
- Providing advice on the management of future whale watching based on assessment of impacts;
- Reviewing information on noise production from vessels and aircraft and its effects on cetaceans;
- To draw up a set of guidelines to assist coastal states in the management of whale watching, based on the experience of member countries;
- Considering the assessment of possible short and long-term effects of whale watching and some special situations such as “swim-with” programmes and dolphin feeding programmes;
- Utilising the opportunities for scientific research conducted from whale watching boats;
- Research on the effectiveness of, and compliance with, management measures.

**1996** IWC Resolution adopted which *inter alia*, committed the Commission to discuss educational, economic and social aspects of whale watching at its Annual Meeting in 1997<sup>8</sup>.

**1997** IWC considers the educational aspects of whale watching. The USA submitted information indicating the potential educational opportunities that are available through whale watching operations and how to make best use of these opportunities.

**1998** IWC considers the socioeconomic aspects of whale watching indicating:

- It offers new development opportunities for coastal communities;
- It can provide substantial economic benefits;
- It is a sustainable, non-consumptive use of cetaceans offering opportunities for non-lethal research;
- It offers opportunities for education and for development of research methods.

**1999** IWC considers the legal aspects of whale watching – including a compilation of existing and “model” legislation and guidelines from around the world.

**2000** IWC considers the increasing value of whale watching to small island developing states and endorses the continuing work of the Scientific Committee. The Scientific Committee held a special two-day workshop on assessing the long-term effects of whale watching on cetaceans.

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<sup>8</sup> Rep. Int. Whal. Commn 47:20-21, 1997

**2001** IWC continues the discussion regarding the value of whale watching as non-consumptive sustainable use of whales. New Zealand cited IFAW report indicating that whale watching is a global industry worth more than one billion US dollars per annum.

**2002** Scientific Committee continued to address research from whale watch operations; the effects of noise on whales and the effectiveness and compliance with national whale watching guidelines and regulations.

**2004** The value of whale watching in Australia – IFAW report presented to IWC by the government of Australia.

**2005** *Growth of Whale Watching in New Zealand*. IFAW report presented to the IWC by the government of New Zealand.

**2007** IWC Commission adopts resolution on the non-lethal use of cetaceans, proposed by Argentina and co-sponsored by 15 other countries. Scientific Committee continues to consider the short and long-term effects of whale watching on cetaceans.

**2008** The Scientific Committee held a workshop on strategic planning of large-scale whale watching research in April 2008 to improve long-term efforts to study the impacts of whale watching on whales. These efforts continue to demonstrate that whale watching is an activity that the IWC should take seriously and that discussions of the management of whale watching should be on an equal footing with discussions about setting catch limits for whaling. Argentina presents IFAW/WDCS/Global Ocean report on the state of whale watching in Latin America to the IWC Commission meeting.

# Whale Watching Worldwide:

## Tourism numbers, expenditures and economic benefits

A special report from IFAW

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