

**Crocodiles and oil prices:
Northern Territory tourism as the
'canary in the coal mine' for global tourism**

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THE END OF TOURISM?

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The world air transport industry is in crisis. Industry losses this year are US\$6 billion, on top of losses of US\$36 billion between 2001 and 2004 (Bisignani 2005). Many industry commentators agree with Bisignani that ‘the extraordinary price of fuel – is destroying [air transport industry] profitability’ (2005; Aylmer 2005: 16; Jens 2005: 45; Spinetta 2005).

Tourism today is highly dependent upon fast, efficient and cheap modes of transport, and air travel is becoming increasingly important. The World Tourism Organization (WTO) reports that in the ten years between 1990 and 2000, air travel grew at 5.5% per year compared with 3.8% for road and -1.1% for rail (WTO 2005d). The 34% increase in tourists over the last ten years (WTO 2005a; WTO 2005b: 2), however, not coincidentally corresponds to a 30% decline in air travel prices over the same period (Ray 2005). This trend is not likely to continue, however, as airlines face bankruptcy if they don’t raise fare prices sufficiently to cover rising fuel costs.

In 2001, global road and air transport represented 51% and 39% respectively of total transport, with air slowly increasing over land transport. In Europe, the proportion of road transport is much higher at 57%, with rail at 5%. In Australia, air transport is critical, with 99% of international visitors arriving by air (Bureau of Transport and Regional Economics 2003, cited in Commonwealth of Australia 2003: 48).

The WTO’s *Tourism 2020 Vision* predicts that tourism will continue to grow to the year 2020 at an average rate of 4.1%, with rates up to 6.5% in East Asia and the Pacific (which includes Australia). Europe will continue to retain the highest share of arrivals (WTO 2005a). These forecasts are only plausible if cheap transport fuel continues to be

readily available. As has been demonstrated over the last few months, the margins of the airline industry are such that rising fuel costs are immediately translated into higher travel costs for tourists. Because of its discretionary nature, tourism volumes are extremely responsive to changing cost structures. Airlines report reaching the limit to which they can raise fuel surcharges without impacting on ticket sales (Ray 2005). As a result of rising fuel prices, airlines are facing the Catch-22 of going bankrupt because air prices are too low to cover costs, or forced contraction due to declining passenger numbers if ticket prices are raised to the point they do cover higher fuel costs (Alber 2000: 5.5).

Energy experts are increasingly critical of the data on which the Energy Information Administration (EIA) bases its optimistic forecasts for future oil production (Campbell 2002; Campbell & Laherrère 1998; Simmons 1997: 2; Simmons 2004: 24). In this paper we will examine the compelling evidence suggesting that oil production will peak somewhere between now and 2010, and, unless demand is reduced by economic recession, oil supply will fall short of forecast demand by 2007 at the latest (Skrebowski 2004a; 2004b). Oil prices need to reach \$60/bbl by 2006 to balance demand with flat and declining supply, and \$101/bbl by 2010 (Rubin and Buchanan 2005: 5). Post 2010 the prospects only get worse for projected oil production. We predict that the rise of tourism to date will be mirrored by its decline as the cost of energy rises.

This paper addresses the unique position of destinations such as Australia and New Zealand, which are almost wholly reliant on air transport. These destinations are not only lengthy distances away from their primary overseas markets, but are separated by sea. The Northern Territory (NT) in Australia, which provides a context for this paper,

is a remote long haul destination for both its international markets and also its domestic market. The paper discusses what we believe are some early indications of the way in which forecast future rises in global oil prices and transport fares may influence mobility. It argues that the problems being experienced in the NT, through declining tourist numbers foreshadow the problems that other places will face in the future.

THE DECLINE OF TOURIST NUMBERS AND MOVES BY AUSTRALIAN TOURISM TO ADDRESS THIS PROBLEM

One of the critical factors of Australia's development has been overcoming the "tyranny of distance" (Blainey 1966). Tourism here has been inseparably linked to development in transport technology, such as steam ships and although the railways assisted in the development of mass recreational travel, they were built relatively late in Australia's history and had less impact than they did in Europe (Blainey 1966; Hall 2003). The development of air travel on the other hand, has had a dramatic effect, especially in relation to overseas visitation. In 1961 Australia received 60,000 overseas visitors, most of whom travelled by sea. By 1964, only 20,000 came by sea and 129,000 arrivals were by air, increasing to 380,000 air travellers by 1969 (Davidson and Spearritt 2000).

Recent events have shown the sensitivity of tourism to the numerous factors which impact on air travel. A decline in the international visitor arrivals to Australia from 4.9 million in 2000 to 4.8 million in 2001 has been attributed to September 11, the Bali bombing, the Iraq war and SARS, with further declines occurring in 2003 (Commonwealth of Australia 2003). The federal government has responded to these

threats to tourism through a *Tourism White Paper* which aims to market Australia as a "Platinum Plus" destination. Rather than attempting to attract larger volumes of tourists, the strategy involves offering a superior product and targeting higher paying travelers (Commonwealth of Australia 2003).

The NT in Australia is a vast region in Australia's north. Its total population is approximately 200,000 (ABS 2004) concentrated in the northern capital of Darwin in the area known as The Top End, and in the Centre around Alice Springs. The Northern Territory Tourist Commission (NTTC) (2003) reports that 70% of its international visitors and 60% of domestic visitors travelled to the Northern Territory by air in 2003. A 2979 kilometre rail link from the city of Adelaide in the south to Darwin was completed as recently as 2004 (Carbone 2004) and to date has only carried a small proportion of travellers, compared with air and road. The NT is heavily reliant on overseas tourists who comprised 30% of total arrivals for 2001-2002. Tourism is important to the NT economy and it contributed 9.1% of the GDP for the 2001/02 financial year and employed 14.7% of the workforce (NTTC 2002) The Territory's isolation has meant the tourism industry has always faced difficulty in attracting sufficient numbers of visitors. While 50 years of cheap transport fuel have made the world a smaller place, the NT is still a long way from almost everywhere else. Like the canary in the coal mine, NT tourism serves as an early warning system for global tourism generally. The consequences of rising transport costs can be expected to hit the NT earlier and harder than other places.

The approach taken by the NTTC in two major campaigns over the past ten years is the focus of this paper. We argue that the NTTC campaigns have attempted to address the

problem of declining visitation, by creating a unique destination and encouraging tourists to make use of a combination of intersecting corporeal and imaginary mobilities.

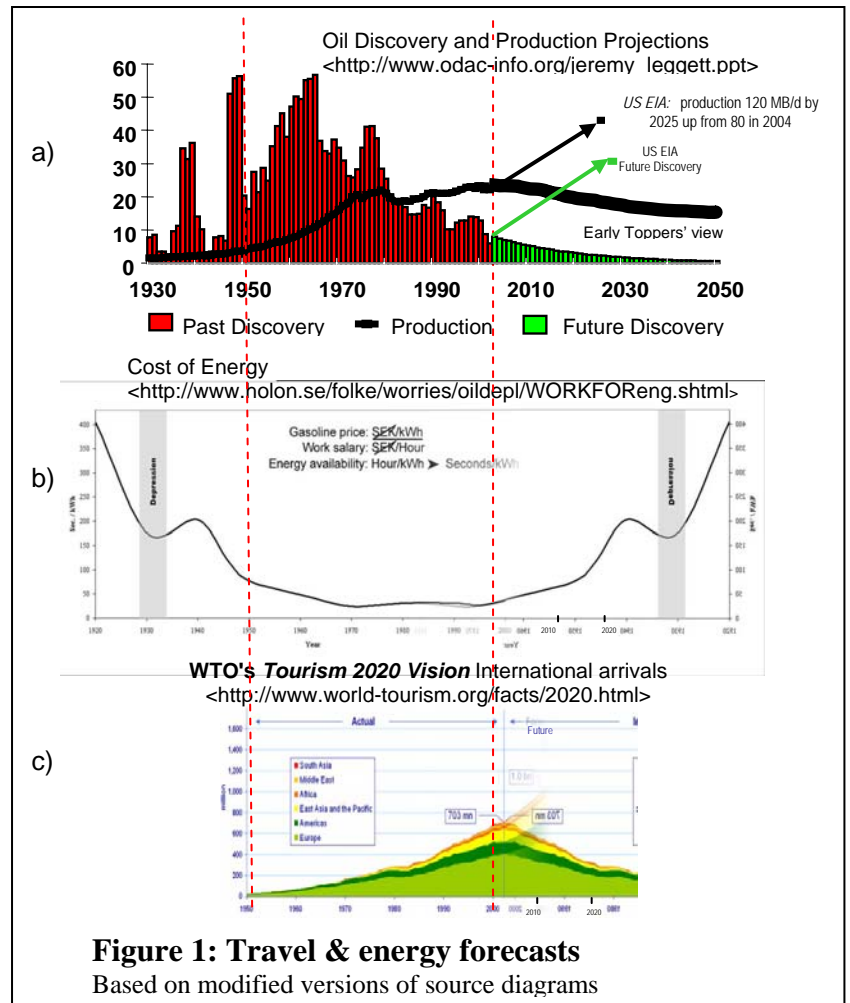
The latest NT campaign is important because it acknowledges that many forms of communication can substitute for physical transport (Urry 2000, 2002). It offers tourists an alternative to the need for repeated visits to a destination, since the real reward promised by the advertisements is achieved by an imaginary journey which does not involve the use of energy. By promoting imaginary revisitations, this campaign offers tourists 'value for money' for a tourism 'adventure' in which transport costs are significant proportion of the overall costs of the corporeal visit. The campaign attempts to persuade potential tourists that the trip is worthwhile by suggesting that this cost can be amortized over many future 'imaginary' visits.

TOURISM AND ENERGY ISSUES

Worldwide international tourism arrivals have increased from next to nothing in the 1950s up to 703 million in 2002. Despite the plateau in growth of tourism numbers between 2000 and 2005 (WTO 2005a) the WTO forecasts a continuation of earlier growth trends indefinitely into the future, with international arrivals forecast to increase to one billion by 2010 and 1.6 billion by 2020 (WTO 2005a).

Like the Australian government, the WTO blames short term disruptions for the interruption to the previous pattern of growth, rather than 'underlying structural trends' (WTO 2005a).

Contrary to the WTO claim that structural trends are not responsible for the slowdown in tourist arrival numbers, Figure 1 shows that growth in tourist arrivals (c) coincides with a period of corresponding growth in world oil production (a) and with the decline in the cost of petrol for workers in industrial countries (b). Growth in tourist numbers and oil production began in 1950, which is when cost per kWh of petrol declined to an insignificant proportion of total expenses.



An analysis of Figure 1a) demonstrates why confidence in EIA forecasts for continued growth in oil production are misplaced. Taken in isolation, the EIA projections for future production look like a perfectly unremarkable continuation of a growth curve. However, in order to be produced oil first has to be discovered. Discovery has been declining since the 1960s. The green (lower) EIA future discovery arrow in Figure 1a) shows the dramatic change in the discovery trend that would be required to meet EIA production forecasts. Whereas the EIA production forecasts can be presented as a

plausible continuation of the production growth curve, future discoveries required to make these production projections feasible are totally implausible.

While the EIA acknowledges that OECD oil production is flat and facing terminal decline, it is relying on increased production largely from OPEC, but also including a smaller increase from the former Soviet Union (FSU), to make up the forecast shortfall between supply and demand (EIA 2005). The International Energy Agency (IEA) similarly relies on increasing output from OPEC to make up any shortfall between non OPEC production and demand (IEA 2004: 545).

Whereas the EIA and the IEA assume Saudi oil production can double over the next 15 to 20 years, Matthew Simmons warns that Saudi Arabia has been relying on water injection to maintain production levels (Simmons 2003) and that Saudi fields are either already in decline or about to do so. The fact that OPEC production has remained flat since 2003 despite rising prices throws doubt on optimistic forecasts for future increases in OPEC production. OPEC is not in a position to respond to future demand increases as excess OPEC capacity peaked at 15 mb/d in 1983, at 32% of global production, and fell from 6% in January 2003 to 0.7% in 2004 (Davie et al 2004)

In the absence of the sorts of increase in discovery forecast by the EIA, production is set to peak somewhere between now and 2010 (Campbell 2005). Because of the time lag between beginning a project and bringing production on line, and based on current demand forecasts, demand will exceed supply by 2007 (Skrebowski 2004a), leading to either serious price rises or economic contraction at that point.

Economists claim that higher prices will result in increased exploration and hence increased discovery. The history of oil exploration and discovery does not support this optimism. When oil prices rose in the early 1980s exploration took off but the discovery trend did not move from its overall decline rate (Campbell 2002). Since the start of this decade the oil majors have been sacking exploration staff and maintaining reported reserves by buying up other companies.

Figure 1b) shows that as oil production rose, the cost of energy declined. As oil production begins its decline, or even falls short of growing demand, the cost of oil will increase, with a doubling needed by the end of the decade to bring demand back in line with supply (Rubin and Buchanan 2005: 5). This sort of price rise would return oil costs to the equivalent of pre 1950 levels.

While rising oil prices have so far mostly impacted on airline profits, rather than ticket prices and tourist numbers, airlines are reaching the limit of their capacity to absorb the sort of losses they have been experiencing for the last three years. As airlines cannot afford idle capacity, however, they are currently passing on to passengers only part of the cost to them of rising fuel prices in fares, and focusing on cost reductions in non-fuel costs and fuel efficiency gains in an effort to return to profitability (Bisignoni 2005; Ray 2005).

As oil production fails to keep pace with rising demand in the near future, however, and spare capacity disappears altogether, such cost cutting offsets to fuel price rises will not be sufficient. Even annual fuel efficiency gains of 3.4% which save the airlines US\$1 billion are insufficient to offset the US\$6 billion loss the industry is facing this year

(Bisignani 2005). This will only worsen in the future as the easiest efficiency gains tend to be made first, current rates of fuel efficiency improvement can be expected to decline over time, while the rate of fuel price increase is likely to rise in line with depletion.

Airlines are currently lobbying to have airport charges and government taxes reduced (Bisignani 2005). Faced with complying or losing their national airlines governments may support some of these demands. However, governments are also under pressure to remove fuel excise exemptions from aviation fuel and to impose carbon taxes to compensate for the environmental externalities resulting from fossil fuel use. As scientific and popular support for action on global warming intensifies, governments will find it increasingly difficult to avoid responding to such demands, despite airline industry opposition (Spinetta 2005).

While tourist arrival numbers have returned to strong growth this year (WTO 2005b), as spare oil production capacity disappears some time between now and 2007 airlines will either go bust or be forced to raise fares, subject to government willingness and capacity to subsidise 'their' national air carrier. As they do tourist numbers will again decline. Just as oil production and prices are going through a bumpy peak preceding decline, so will the plateau in tourist arrival numbers beginning around 2000 as shown in Figure 1c) will turn out to be the beginning of a bumpy peak of tourism growth rather than a mere interruption in the growth trend, as rising fuel and air travel costs begin to bite into the discretionary spending of erstwhile tourists.

Because of its isolation the travel costs to the NT are a bigger proportion of total tourist expenditure than for destinations closer to home. Relatively small changes in fuel prices

will have a bigger impact on NT tourist numbers than it will for other destinations.

Northern Territory tourist campaigns incorporate strategies they have adopted deal with the issue of declining visitation and the need to attract a market which is reliant on air travel. The NTTC advertising campaign offers an insight to the changes that rising oil prices may have on corporeal, virtual and imaginative mobilities (Urry 2002).

SHIFTING MOBILITIES: FROM 'NEVER NEVER' TO NEVERLAND

In an effort to boost lagging visitation levels in the early 1990s, the NTTC commissioned a campaign based on the slogan 'You'll never never know, if you never never go' (NTTC 1993). The use of 'Never Never' in the campaign draws on associations from the novel *We of the Never Never* published in 1908. The story was written by Mrs Aeneas (Jeannie) Gunn about her life as the wife of the manager of the Elsey cattle station.

The campaign drew on western perceptions of the Never Never land, 150 miles south of Darwin, as an isolated frontier of adventure and danger. Evocation of the spirituality and timelessness of the Aboriginal Dreamtime in association with the NT campaign served to emphasize the culture and country of local Aboriginals as 'other'. In the deserts of the Centre in particular, Qantas described the Northern Territory as 'different from any other Australian state. It's vast, grand and spiritual - the essence of the Aboriginal dreamtime'. Alice Springs was described as 'an oasis in the timeless deserts of Australia's red heart' (Qantas 1995: 3). This spirituality was a 'romantic gaze' in which 'the emphasis is upon solitude, privacy and personal, semi-spiritual relationship with the object of the gaze' (Urry 2003: 3; Urry 1990).

Gunn wrote of the Never Never as a place where time moved very slowly, and which one of the stockmen described as ‘the Land of Plenty of Time; Plenty of Time and Wait a While’ (Gunn 1983: 13). Her journey to this country by horse provided her with the opportunity to physically experience the landscape as she travelled through it. This idea of slowly moving time was also depicted through the early Never Never campaign literature: ‘As you drift slowly through these waterways the thought may strike you that scenes like this have been enacted here, every day, for tens of thousands of years, unchanged’ (NTTC 1993: 9).

The campaign, which began in late 1992, was very successful and helped to boost tourist numbers for ten years. The advertisements described the NT as ‘*the last frontier*, an outback holiday [that] is remarkably civilised’ (NTTC 1993:2 emphasis added). The campaign materials helped to establish the two major environments within the Territory; the wet tropical Top End and the arid region of The Centre. Each region was represented by an icon animal - the camel for the centre and the crocodile for the top End. The Qantas brochure for the Northern Territory described the NT as ‘outback, adventure, desert, heritage, myth, legends, unparalleled beauty...it's waiting for you’, and the brochure cover featured among other attractions, camels in the desert, and the crocodile in the wetlands of the Top End (Qantas 1995). This paper focuses on one of these icons, the crocodile which was described in one brochure thus: ‘Of course, the Top End is real croc country’ (NTTC 1993: 7) ‘brazenly lying on the bank, or cruising craftily just beneath the surface. Primeval submarines’ (NTTC 1993: 9).

By the late 1990s the NT was again struggling to maintain its visitation levels. The ‘tyranny of distance’ continues to beleaguer NT attempts to maintain tourist numbers, and demonstrates that WTO assumptions of continuous growth cannot be relied upon.

The trend towards short-break domestic holidays facilitated by the cheap holiday packages introduced by both Ansett and Qantas in the interest of their profit margins did not suit the NT product (Tolhurst 1997). As Lawson (2003: 5) commented, ‘because of the distances involved a trip to the NT is not like a spur of the moment trip or a weekend away’. Since 2003 the NT government has struggled to persuade and provide incentives to airlines to provide sufficient services to Darwin to maintain tourist access despite airlines seeing it as a low-yield route and cutting services (Northern Territory Aviation Committee (NTAC) 2004: 5). Promoting tourist arrivals through their new Neverland campaign is a central part of a strategy to maintain viable airline services to the NT.

The latest 2003 campaign builds on the original Never never campaign by extending the ideas and concepts of mobility to include *fantasy* associations which link the Never never to the Neverland of Peter Pan. The Neverland of the Peter Pan story written by JM Barrie and published in 1911, refers to a faraway land in which the main characters set up house and live for a while before returning home, somewhat like Mrs Gunn did. Neverland and the Never Never, were both places for adventure, full of exotic people and creatures. The infamous and wily crocodile appeared as both hero and villain. Like Australia, Neverland was accessed by air travel.

A range of media were used and two advertisements were developed for television; one is based on the Centre and the camel icon, and the other, which is discussed here,

features the crocodile of the Top End. The ad features a man dressed in a white bath robe, day dreamily looking into the mirror, in a stark, white bathroom. The whiteness reminds us that this bathroom is shortly to become the site of a spiritual experience. As the bath fills the man turns to see a crocodile slowly surface from beneath the water in the bathtub. The two exchange a knowing look, before the crocodile turns and swims off into a sunset panorama of a Territory wetland. The voice-over then asks 'When last did you have an experience you'll never never forget?' The bath runs over as a signal that time has passed and the traveler has now returned from his fantasy daydream to the real world. The crocodile and the timelessness portrayed here evoke images of a new mobility and of magical travel to Neverland.

The NT is not the only remote destination relying on the appeal of fantasy and daydreams to attract visitors. New Zealand (NZ) is another destination just as much subject to the 'tyranny of distance' from everywhere else as the NT. Their current campaign relies on the association between NZ and the fantasy land of Middle Earth to attract its visitors (Kazi 2005:19)

The new slogan for the NT is that 'it'll never never leave you'. (NTTC 2005a). The managing director of the NTTC Maree Tetlow was reported to say that people now want an experience rather than a holiday, and they want a holiday to have a lasting effect (Lloyd 2003: 70). Evoking the original Never never campaign, tourists are encouraged to visit the replica of the Elsey Station homestead which was built for the film version of the novel (NTTC 1993: 13). The importance of seeing the crocodile icon first hand is reflected in the fact that although their image is one of awe and fear, over half of the visitors to the NT in 2000 had seen real crocodiles in a natural setting (Ryan 1998; Ryan

and Harvey 2000). The opportunity for future imaginary journeys offered by the current campaign is possible only if the traveler has previously 'faced-the place' (Urry 2002).

Corporeal travel remains a critical component of a Never Never experience, and as Urry (2002: 258) suggested, physical proximity, or co-presence to the landscape and its people is 'obligatory, appropriate or desirable'. He termed it a 'face the place' type of co-presence, in which 'To be there oneself is critical' (Urry 2002: 261). That is, as the early advertisements warned, 'if you did not go (corporeally) you would never never know'.

Despite the exploitation of associations with aboriginal culture and spirituality in these campaigns, the idea of going to other people's places just to see them is deeply rooted in western traditions of quest and pilgrimage which are foreign to aboriginal ideas about travel.

'A Northern Land Council study in 1985 showed that many Aboriginal people already involved in tourism did not really understand why tourists were coming to their country ... they thought it was not polite for people to wander through other people's country for no good reason' (Kit 1987:4 cited in Mercer 2000: 186).

By describing the pervasive western desire to know other places by experiencing them directly as 'obligatory, appropriate ... [and] critical' Urry (2002:261) is naturalising and universalizing what are in fact culturally specific western views that are in conflict with Aboriginal propriety. Having to see 'other' places for oneself is no more natural or essential than going through other peoples cupboards when you visit their house, and from an Aboriginal perspective just as much in breach of social norms. The cultural and

historical specificity of this expectation makes it vulnerable to changing circumstances, such as rising oil prices, in a way that Urry's analysis occludes.

Travelling to the NT has changed radically over the past century, from a physically demanding and slow moving experience on horse-back to air travel, where time and space have all but collapsed into each other (Holmes 2001). Both Neverland and the Never Never were characterised by an other-worldly sense of time, which influenced the nature of the characters' journeying and the experiences open to them. The NTTC traveller depicted in the recent campaign, can transcend time and space on a whim and return to the Never Never in the short time that it takes for a bathtub to fill. This experience is closer to the temporal zone of Neverland, where time stood still and where it had little meaning.

The imaginary mobility promoted in the latest NT tourist campaign approaches virtual travel and virtual spaces which Holmes (2001: 5) describes as those of "instantaneous time [where] time is no longer lived as a constraint". Holmes (2001: 6) also argues for the continuity between tourist and virtual spaces and describes spaces as "an experience of open and autonomous mobility". This suggests that tourist experiences need not be dependent on oil prices, aircraft technology and plenty of time.

Other factors assist in creating the possibility for imaginative travel to the NT. The gaze of the NT experience is a romantic one involving an individual, rather than a collective (Urry 2002, 1990). This romantic and solitary gaze more readily lends itself to the notion of imaginary or disembodied travel, and the promise of a personal spiritual experience that is possible in one's home (Holmes 2001). The initial physical journey

by aircraft also helps to create a Neverland type experience. Larsen (2001: 80) states that "The tourist body senses landscapes as it is *moved* through them". Clearly Mrs Gunn sensed the Never Never during her journey, but, for the greatest part of a journey by air, the traveller does not sense the landscape at all. This helps to create an illusion that the traveller is transported by magic, and thus the corporeal journey can be likened to a flight to Neverland. The crocodile provides the link between the traveller's home, the Never Never and Neverland. The crocodile is primeval – it persists through generations of time and space. Its presence indicates continuity between the different mobilities used to access the different time zone and space of the NT.

The current campaign introduces and promotes the use of multiple mobilities, each providing a unique experience. An initial corporeal trip involving a 'face the place' experience with attractions such as crocodiles appears necessary to activate the second imaginary journey. The slogan that 'it'll never never leave you' refers to the memory of the crocodile and other aspects of the corporeal experience. The NTTC campaign suggests that these images can be recalled to fuel an imaginary and spiritual journey. At this point however, virtual and imaginative travel do not completely meet all of the benefits that can be obtained through corporeal travel, including the experience of the travel for its own sake (Urry 2002; Mokhtarian, Salomon and Redmond 2001). The NT is currently exploiting such perceived deficits of 'imaginary' travel to promote at least 'once in a life-time' trips to the territory.

CONCLUSION

In Mrs Gunn's day, and for travel before the advent of the jet plane, the journey itself was as important as the arrival. Larsen is critical of contemporary transport technology in that "Arriving becomes everything, movements through spaces nothing but insignificant, linear, predetermined and frustrating transport" (Larsen 2001: 81). The rise in oil prices will significantly alter these scapes, or the structures, which enable the flow of tourists (Urry 2000). As oil prices increase, inequalities of flows will be enhanced, to affect not only individuals but larger organisations and the economies of places such as the NT. . A further problem is that there is relatively little attention in the tourism literature to the social impact of air travel. Urry (2000) has already noted that the effect of automobility on societies has largely been ignored and that cars have been regarded as 'a neutral technology'. The attention to air travel is concentrated largely on maintaining current levels and ignores its impacts. A recent World Tourism Organisation (WTO 2000) seminar for example, makes only a passing reference to the sustainability of air transport. For example, Larsen (2001: 83) discusses road and rail as almost a supernatural experience to 'fly', but fails to extend the discussion at any length to air travel.

The massive increase in tourist travel to the NT resulted from a combination of several factors, but particularly the technological change from horse to air transport which was fuelled by cheap oil. The immanent arrival of Peak Oil, along with the threats presented by climate change, are already demanding technological developments and will also require social changes and new forms of mobility. Given that a return to horse-fuelled

transport is unlikely in the near future, the imaginative mobility presented by the NTTC campaign presents an interim solution.

Holmes (2001: 8) argues that “journeying within virtual environments is just as ‘real’ as journeying within non-virtual ones” and that some may be more ‘real’. Or as Barrie (1988: 90) described it for Peter Pan, “Make-believe was so real to him”. The journeying promoted by the NT ads is an intermediate mobility compared with virtual travel (Urry 2002; Holmes 2001). Campaigns for ‘Australia’s Great Train Journeys’ on the Ghan, which emphasize the trip rather than the destination (Great Southern Railways 2001; NTTC 2005), may illustrate the sort of options that will receive greater attention soon; on our way to accepting that arm chair virtual travel to distant places is all that most people will be likely to experience in the not too distant future.

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