AN INDUSTRY IN DECLINE? THE EVOLUTION OF WHALE-WATCHING TOURISM IN HERVEY BAY, AUSTRALIA

SHEILA PEAKE

International Relations, University of the Sunshine Coast, Queensland, Australia

This article examines the evolution of whale watching in Hervey Bay, Queensland in relation to the Butler tourism life cycle model, and Duffus and Dearden’s conceptual framework for wildlife tourism. It analyses official visitation data, wildlife records, tour operations information, and interviews with tour operators and the protected area management agency. The results indicate that changing visitor and commercial operator numbers and profiles, increasing regional competition, and a changing relationship with the protected area managers may be symptomatic of a maturing industry that has reached a watershed point in its sustainability. The findings of this research have implications for tourism stakeholders including planners, protected area managers, and tour operators in relation to changing sector demands and proactive adaptation to those changes.

Key words: Whale watching; Tourism life cycle model; Hervey Bay

Introduction

Tourism settings and industries are generally vibrant and ever changing. They offer opportunities for employment, entrepreneurs, and local businesses, and often bring significant economic benefits to the local community. Thus, the planning and management of tourism in natural settings also requires a dynamic approach by the professionals involved in the assessment and impact of these industries. Today consideration of a wide range of factors makes this an increasingly complex task. The approach to planning and management adopted in this article, considers the history of the area, the current use, the impact of the tour operation on the setting and/or wildlife involved, the overall development of the local and regional community and its infrastructure, and future trends. All these factors are important considerations in planning and managing tourism industries, and while planners and managers may take into account traditional social, environmental, and engineering perspectives, there is also much to be gained by considering research findings informed by tourism destination life cycle research. This research approach has potential synergies for planners and managers because it provides an indicator of the impact of the tourism industry’s growth and decline on the community involved. Combined with currently used planning and management assessments, a better understand-
ing of the long term impacts of a tourism operation on both the setting/wildlife and the local economy can be achieved. The whale-watching tourism industry in Hervey Bay, Australia provides a good case study and has been an important contributor to regional community development for over 20 years.

Whale-watching tourism experienced considerable growth, both globally (Greenpeace, 2004; International Fund for Animal Welfare [IFAW], 2004) and at the community level in the 1980s and 1990s (Hoyt, 2001; Valentine & Birtles, 2004). Australia embraced this by establishing the first commercial whale watching at Hervey Bay in 1987. By 2003 the Australian commercial whale-watching industry was estimated to have contributed AU$300 million to the economy with over 1.6 million tourists paying to see whales (Martin, 2006). In the same year Queensland recorded 230,000 whale-watching visitors, generating over AU$96 million to local communities (IFAW, 2004). Hervey Bay whale watching started small with around 27,000 visitors by 1990. However, by 1996 this had grown to more than 83,000 (Environment Protection Agency, 2006). The rapid growth of whale watching in Hervey Bay was reflected by substantial benefits from visitor spending within the local community with more than AU$30 million spent in Hervey Bay by whale-watching visitors in 1999/2000 (Hoyt, 2001; Wilson & Tisdell, 2003). In 2001 Hervey Bay was identified as one of three Australian communities having received substantial economic benefits from this growing industry, the others being Byron Bay (NSW), and Monkey Mia (WA) (Hoyt, 2001). Hervey Bay soon became recognized as Australia’s premier Humpback Whale (Megaptera novaeangliae) watching area. The success of Hervey Bay is credited as fostering the development of whale-watching tourism into other areas of Queensland, such as the Great Barrier Reef World Heritage Area (Stokes, Dobbs, & Recchia, 2002). Today whale-watching tourism continues to increase across Australia; however the viability of areas like Hervey Bay is being impacted by a number of local and regional influences.

Tourism industries evolve over time and are a product of social expectations, driven by the values and norms of the actors within them. They are also transformed by changing contextual, social, and physical influences. Butler’s (1980) Tourism Destination Life cycle Model views changes in tourism settings over time as reflective of the evolution of these industries. Following Cohen (1972), Noronha (1976), and Plog (1972), Butler developed his model of evolution of a tourism destination based on seven distinct phases that integrated the physical and social developmental of an area with changes over time. Butler indicated that as an area moved from the initial exploration and development phase to the consolidation, stagnation and decline phases, change in visitor numbers and typology, operator numbers and typology, competition from other areas, and management practices would begin to impact. Although Butler’s research was focused on addressing the decline of environmental quality, he was also concerned that planners and tourism managers understood that tourism could not be viewed as a continually renewable resource.

In adapting Butler’s model specifically for wildlife tourism settings, Duffus and Dearden (1990) incorporated the tourism user, the wildlife and ecology of the setting, and the interaction between the two, including the input of management, changes to tour operators, and changes to the site over time due to evolving demand from visitors. This allowed them to contextualize change in terms of user typology and the development of the site in relation to carrying capacity. Hvenegaard (1994) suggested that changes in tour operators, and their operations, to accommodate changing visitor needs was also an indicator of an evolving industry as it moved through the phases of Butler’s and Duffus and Dearden’s models. Hvenegaard (1994) proposed a tour operator classification based on their level of responsibility for their own impact, their level of commitment to the industry through education of visitors, and the quality and training of tour guides. Others, such as Russell and Faulkner (1999), suggested that the interactions between stakeholders, (particularly the tension between tour operators, managers, and planners), was also a consideration in the evolution of a tourism destination.

This article focuses on four main aspects of these models to examine the changes in this industry. Specifically, it details changes in visitor numbers and typology, tour operator numbers and their operations, changes in local and regional competition, and finally the relationship between the protected area managers and tour operators.
Location of the Study

Hervey Bay, located on the east coast of Australia, lies on the natural migration route of the Humpback Whale. Humpback Whales use Hervey Bay as a stop-off point, both on their northern migration and before returning to Antarctica (Vang, 2002), congregating in the bay for prolonged periods on their migration (Department of Environment and Heritage, 1997; Vang, 2002). Thus, the large number of whales sighted each season, plus having the largest and most diverse range of whale-watching tours anywhere in Australia, and the relatively sheltered viewing environment within the lee of Fraser Island, made Hervey Bay an ideal whale-watching destination. Other factors, such as the declaration of a Marine Park in 1989 specifically as a whale management area (Department of Environment and Heritage, 1997; Environment Protection Agency, 2004; Vang, 2002), its accessibility to a major capital city (Brisbane), and a major tourist destination (Sunshine Coast and the World Heritage listed Fraser Island) all contributed to the development of whale-watching tourism in this region.

Method

This study is based on doctoral research which focused on the communication of conservation in whale watching. The research investigated changes in Hervey Bay whale watching, and sought to take into account the diversity and multidimensionality of the setting. As stated earlier, it combined models to give a more complete picture of the changing environment. Information was collected through the analysis of official Queensland Parks and Wildlife Service (QPWS) visitation data and wildlife records collected since 1989; content analysis of tour operation material; on-tour visitor surveys; and interviews with tour operators and the protected area management agency. The range of information collected allowed greater capacity to understand the changes occurring in Hervey Bay whale watching.

Quantitative data was analyzed using SPSS (Statistical Package for the Social Sciences) and results are reported in percentages. A more complex multivariate analysis was conducted on the results and is reported in detail in Peake (2008).

Results

Hervey Bay tour boats have carried more than 1 million passengers to view whales, on 19,500 trips with over 63,000 recorded whale pod interactions in a period of 17 years to 2005 (Environment Protection Agency, 2006). While Hervey Bay whale watching has operated since 1987 (>20 years), data was not collected before 1989 or after 2005 by the QPWS.

Visitor Numbers and Profiles

Hervey Bay whale watching grew rapidly in the first seven years-peak ing in 1996 (Fig. 1). Visitor numbers remained high until 1998, then trended mostly down each year, with the largest drop between 1999 and 2000. While fluctuations have occurred since then, visitor numbers have remained well below the 1996 peak, and since 2003 have continued to decline. The rate of change in visitor numbers highlights the downward trend from the initial growth period through to 2005 (Fig. 1).

The visitor profile established in 2005 (Peake, 2008) indicated the whale-watching visitor was predominately Australian, with over half of all Australian whale-watching visitors to Hervey Bay from Queensland (Table 1). Interestingly, overseas visitor numbers more than doubled in a decade (Muloin, 1998; Peake, 2008).

Visitors’ prime motivation for coming to Hervey Bay to view whales (58.8%) (Table 1) was not unexpected; however, interestingly this had increased by 18% in a decade (Muloin, 1998; Tourism Queensland, 1998). The gender and age of whale watchers was similar to previous research, with marginally more females than males (Table 1), and most visitors 26 years and older (Muloin, 1998; Tourism Queensland, 1998; Valentine, 2004). However, changes in the visitor age profile were noted from previous studies for some age cohorts, with an increase in the over 56-year-old age group (11%), which was off-set with a similar drop in the 26–55-year-old age group.

Data from the 1994 and 1998 studies (Environment Protection Agency, 2006; Muloin, 1998; Tourism Queensland, 1998) indicated first-time whale watchers increased up to 1998. While most visitors in 2005 were first-time whale watchers, the
reduction in first-time whale watchers was more dramatic compared to overall whale-watching numbers (Fig. 2). The number of first-time whale watchers between 1987 and 1994 is not known.

More than half (59.4%) of the visitors had some prior knowledge of whales before going on the trip, 9.8% indicated a lot of knowledge and 30.8% indicated no/very little knowledge. Visitors’ age was a determinant of knowledge, with those over 56 years old having a higher than expected outcome in a random distribution for the “a lot of prior knowledge” category (Peake, 2008). The increase in the >56-year-old age group indicated a changing visitor demographic towards an older visitor, who was a more knowledgeable and experienced whale watcher (Peake, 2008). It is possible that this reflects a natural progression of those whale watchers from the 1980/1990s, who are now in an older age cohort and may have returned.

Changing Local and Regional Competition

The domination of Hervey Bay whale watching in the South East Queensland region between 1989 and 1998 was reflected in marginal fluctuations in the number of tours operating. However, from 1998 to 2005 a more constant decrease in the number of tours (Fig. 3) mirrored the decline in overall tourist numbers (Fig. 1). A total reduction of 60% of tours operating over that period culminated in only eight tours operating in 2005. Although boat numbers continued to decline, the number of trips offered continued to rise until 2001. However, by then these boats were carrying 20% less passengers. The decreasing number of tour operators was accompanied by a number of changes in boat types, operation types, and tour owners, as this industry and location adapted to changing demand and competition. The variation in whale-watching tour boats operating between 2004 and 2005 typified these changes, and were reflected in boat size, visitor capacity, trip frequency, boat type, and cost. In 2004, boat-carrying capacity ranged from 20 to 250 passengers.

In 2005, two of the largest carriers did not operate, with 150 passengers the largest number carried. In 2004, the carrying capacity of ten boats was 1530 passengers per day, equating to 128,520 for the season. Tour boats ranged in size, from a 10.5-m sailing catamaran to 20-m double-deck fast catamarans, and the services offered ranged from dawn cruises and night cruises (2004 only), half-day,
three-quarter day, and full-day tours. Between 2004 and 2005 the mode of operation of the boats changed, with more half-day trips, and no dawn or evening cruises. In 2005, eight boats operated a total of 12 trips per day, with a potential carrying capacity of up to 1170 passengers per day, equating to 98,280 for the season. Reported returns suggest only 60.6% of capacity was used (Environment Protection Agency, 2006).

The drop in visitor numbers and tours operating out of Hervey Bay may be due to a number of factors, including saturation of the local market or from increasing competition within the region. When examined in terms of increasing regional competition, the impact of six whale-watching tours operating outside of Hervey Bay by 2008 may have been a catalyst for declining visitation. These six tours operated in areas closer than Hervey Bay to the major population centers of south-east Queensland, thus competing in Hervey Bay’s traditional markets of Brisbane, the Gold Coast, and the Sunshine Coast (Fig. 4). In 2005, 28% of visitors to Hervey Bay came from the Brisbane metropolitan area, 5% from the Gold Coast, 8.3% from the Sunshine Coast, and 10.7% from the Hervey Bay region.

Table 1
Hervey Bay Whale-Watching Visitor Profile in 2005

<table>
<thead>
<tr>
<th>Origin</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Australian</td>
<td>71.4%</td>
</tr>
<tr>
<td>Queensland</td>
<td>57.5%</td>
</tr>
<tr>
<td>NSW</td>
<td>22.2%</td>
</tr>
<tr>
<td>Victoria</td>
<td>12.6%</td>
</tr>
<tr>
<td>Rest of Australia</td>
<td>7.7%</td>
</tr>
<tr>
<td>Overseas</td>
<td>28.6%</td>
</tr>
<tr>
<td>UK</td>
<td>32.0%</td>
</tr>
<tr>
<td>Germany</td>
<td>17.0%</td>
</tr>
<tr>
<td>Other Europe</td>
<td>16.0%</td>
</tr>
<tr>
<td>USA &amp; Canada</td>
<td>11.0%</td>
</tr>
<tr>
<td>New Zealand</td>
<td>10.0%</td>
</tr>
<tr>
<td>Age</td>
<td></td>
</tr>
<tr>
<td>&gt;25 years</td>
<td>86.1%</td>
</tr>
<tr>
<td>18–25 years</td>
<td>13.9%</td>
</tr>
<tr>
<td>Gender</td>
<td></td>
</tr>
<tr>
<td>Female</td>
<td>55.9%</td>
</tr>
<tr>
<td>Male</td>
<td>44.1%</td>
</tr>
<tr>
<td>Motive</td>
<td></td>
</tr>
<tr>
<td>To see whales</td>
<td>58.8%</td>
</tr>
<tr>
<td>Holiday</td>
<td>47.5%</td>
</tr>
<tr>
<td>Visit family/friends</td>
<td>16.0%</td>
</tr>
<tr>
<td>Prior knowledge about whales</td>
<td></td>
</tr>
<tr>
<td>A lot</td>
<td>9.0%</td>
</tr>
<tr>
<td>Some</td>
<td>59.4%</td>
</tr>
<tr>
<td>None</td>
<td>30.8%</td>
</tr>
<tr>
<td>Whale-watching experience</td>
<td></td>
</tr>
<tr>
<td>First time</td>
<td>68.7%</td>
</tr>
<tr>
<td>Australian</td>
<td>66.5%</td>
</tr>
<tr>
<td>Overseas</td>
<td>74.1%</td>
</tr>
<tr>
<td>Age</td>
<td></td>
</tr>
<tr>
<td>18-40 years</td>
<td>78%</td>
</tr>
<tr>
<td>&gt;56 years</td>
<td>62%</td>
</tr>
<tr>
<td>Experienced</td>
<td></td>
</tr>
<tr>
<td>Twice</td>
<td>15.6%</td>
</tr>
<tr>
<td>Three times</td>
<td>6.3%</td>
</tr>
<tr>
<td>Four times</td>
<td>3.4%</td>
</tr>
<tr>
<td>Five or more</td>
<td>5.9%</td>
</tr>
</tbody>
</table>
their business from tour guide certification or training.

Interviews with tour operators confirmed, not unexpectedly, that visitor entertainment was the primary focus of the tour. While most said they provided some information on conservation, this was not deemed a top priority. All indicated their role was not to educate visitors about conservation or communicate the protected area values espoused by the management agency. This was summed up by two operators, who stated, “explain what the whales are doing at the time, information not education, just make sure guests have a good time and see whales.” and “no message, just enjoyment, not into education, the experience itself will do that.” However, a visitor survey found 48.5% of visitors indicated that conservation should have been covered on the tour (Peake, 2008).

When investigated, a tenuous relationship between the protected area managers and tour operators existed. Tour operators stated a lack of support from the QPWS for their industry. Operators also expressed a lack of confidence in the ability of the QPWS to provide interpretive support and training.
for tour staff, and were critical of the overall management of the marine park.

However, when QPWS staff were interviewed, their perspective of tour operators' roles and the QPWS support for them indicated disparity. QPWS expected that tour operators understood their role in the education of the visitor; however, they had no idea how many boats had staff trained or qualified to undertake this communication. QPWS stated they supported tour operators through the provision of a Whale-watching Education Program, which outlined tour operator responsibilities, such as to “provide a concise take home conservation message” about whales and the marine environment as reinforcement of the visitor’s experience (Environment Protection Agency, 1999). QPWS conducted infrequent evaluation of the tour operators’ interpretation program and operation “because they had all been doing it so long.” QPWS stated that “it did not perceive there to be any problems.” When asked specifically about the communication of conservation and management messages, QPWS indicated these topics were problematic in tour operator presentations. However, they indicated that they did not feel it was their responsibility to address this issue, thus reinforcing what tour operators stated about support. This statement was contrary to the specifics of the legislation that directed QPWS and their role in the support and training of tourism staff (Environment Protection Agency, 2005).

Wildlife Changes

While not a core component of Butler’s model, Duffus and Dearden used changes in the resource as an indicator of an evolving destination. Available wildlife data was used to superficially assess if changes to the site followed Duffus and Dearden’s model. Although visitors, tour boats, and the number of trips were declining, whale pod/interactions nearly tripled between 1989 and 1998. However, since then, pod sighting declined by 38% to 2005 (Fig. 5). These fluctuations in pod sightings are likely to be associated with normal yearly fluctuations in the number of animals returning to breed as part of a natural cycle (Vang, 2002). The large drop in pods sighted in 2005 may also be relative to the decreased number of trips made by boats. However, these decreasing numbers could indicate a declining environment, as suggested by Duffus and Dearden, although further research would be required to make any assumptions about the resource at this time.

The findings of this research indicate many changes in Hervey Bay over its 20 years of operation, both spatially and numerically. These findings...
are now discussed in terms of Butler, Duffus and Dearden, and others.

Discussion

The models proposed by Butler and Duffus and Dearden, are often used in wildlife tourism research to evaluate the evolution of the setting (Dearden, 2006; Duffus & Dearden, 1990; Higham, 2006). Butler suggested as an area was discovered, a well defined tourist season emerged, and with increasing visitor numbers, local infrastructure developed and adapted as the local economy became increasingly reliant on tourism. His model suggested that after the initial boom, tourist numbers, and operators would consolidate, peak, and then over time potentially stagnate and decline.

This research supports a number of Butler’s assumptions in particular changing visitor numbers (Fig. 1). While the decline in visitor numbers in 2000 was attributed, (in local press), to a series of events such as: the effects of the Sydney Olympic Games; the introduction of GST; and a dingo attack on a child on Fraser Island earlier in the year (Ryan, 2001), the downward trend continued. Butler predicted that the rate of change in visitor numbers would slow before a peak was reached, although overall numbers could continue to increase. Figure 1 shows the rate change started slowing from 1993 with a large drop in 1995, although visitor numbers continued to rise until they peaked in 1998. When Hervey Bay visitor numbers are mapped onto Butler’s model, they mirror much of the destination life cycle (Fig. 6).

Accompanying this change in visitor numbers, Butler and Duffus and Dearden suggested as tourism industries mature, visitor typology changes from the initial small number of explorers/wildlife specialists/hard ecotourists (Butler, 1980; Duffus & Dearden, 1990; Weaver, 2004) to a larger number of mass tourists/generalists. Recreation specialization theory (Bryan, 1977) also links increasing experience to changing user typology from novice to specialist, accompanied by a narrowing of visitors’ requirements (Dearden, 2006; Duffus & Dearden, 1990; Lehto, O’Leary, & Morrison, 2004). This research supports this change in visitor typology with first-time (novice) whale watchers increasing between 1994 and 1998. However, the drop in first-time whale watchers by 2005 (Fig. 2) deviates Hervey Bay from Duffus and Dearden’s model, with experienced whale watchers a substantial proportion of the visitor profile. While Hervey Bay whale watching shows signs of a maturing industry, the change in visitor typology does not follow the model’s assumptions after 1998 (Butler, 1980; Duffus & Dearden, 1990). This may be linked to the older demographic of the respondent and an artifact of the predominately domestic market. It is unfortunate that the number of first-time whale watchers between 1987 and 1994 is not known, as it would allow more meaningful comparison with Duffus and Dearden’s assumptions about a changing visitor profile, over time.

Figure 5. Whale pod interactions recorded from 1989 to 2005. Based on data from QPWS annual returns.
The change in visitor numbers, and perhaps visitor typology, was reflected in the fluctuations in tour operator numbers, boat sizes, types and number of trips over the past 20 years. Within that period, a number of boats had changed ownership, some relocated, and others downsized. The significant decline in tour boats suggests Hervey Bay whale watching may have reached its carrying capacity; is in a stagnation/decline phase; or is being impacted by regional competition.

Russell and Faulkner (1999) view competition as part of the dynamic adaptability of tourism operators to address supply and demand fluctuations, both within a destination and outside the destination. Butler, however, viewed competition with decreasing tourist numbers as symptomatic of an industry in decline. He stated that as stagnation was reached, although the area could still have a recognizable image it would not be as popular, and competition from newer attractions would impact substantially in what was once a strong market (Butler, 1980). While Hervey Bay is today still recognized globally as Australia’s premier whale-watching location, an expansion of whale-watching tours in southeast Queensland since 1996 (Fig. 4) has facilitated greater opportunities for people to whale watch closer to major tourist centers. While there are major differences in the type and quality of the experi-

![Figure 6. The evolution of whale watching in Hervey Bay in relation to Butler’s model. Butler curve (solid line). Adapted from Duffus and Dearden (1990) and Bulter (1980).]
ence at locations outside of Hervey Bay, tourists are unlikely to be aware of these when choosing their whale-watching tour. This increasing regional competition has likely impacted on the status of Hervey Bay in a number of ways, most notably in the decreasing number of boats operating, the decline in tourists visiting, and in economic benefit to the local community.

Hvenegaard (1994) and Duffus and Dearden (1990) viewed changing tour quality, tour operators commitment, tour operator perception of their responsibilities, and their relationship with the protected area managers as indicators of a maturing industry. While tour operators and QPWS must comply with specific legislation in relation to whale watching and the provision of services to visitors, differing priorities can result in a tenuous and often conflicting relationship (Ballantyne & Uzzel, 1999; Russell & Faulkner, 1999). Russell and Faulkner (1999) suggest this is not uncommon and view tour operators as agents of change, motivated and innovative, adapting readily to changing supply and demand, whereas planners and managers are focused on moderating and controlling change. Interviews highlighted the differing priorities and perceptions of each stakeholder’s role in the marine park. QPWS, in their management role of the marine park, believed tour operators could assist them by delivering specific messages from the whale education program. However, they did not view it as part of their role to provide tour operator’s assistance and training to deliver these messages, although this is clearly stated in the legislation (Environment Protection Agency, 2005; see Peake, 2008, for further detail). In contrast, tour operators had no or little understanding of the expectations of the QPWS in their assisting with the management of the protected area through the communication of protected area values to visitors. The failure of both sides to recognize conflicting priorities, especially in relation to resource conservation as a joint responsibility, reflects the breakdown in communication and cooperation between the tourism industry and government.

One might assume that in the initial stages of Hervey Bay whale watching, tour operators represented “authentic” or “hard” ecotourism (Steiner & Reisinger, 2006; Weaver, 2002, 2004; Weaver & Lawton, 2002) characterized by enthusiastic tour operators working closely with the management agency, having similar objectives and promoting values important in the industry about whale conservation. As the industry developed, it followed the Butler curve and typified the characteristics of Duffus and Dearden’s model, suggesting in the middle stages a change from “hard to softer ecotourism.” At this time, the interpretation may have become more general to accommodate a predominately novice audience, and tour operators’ reliance on the management agency may have decreased, resulting in the breakdown of communication between these major stakeholders. The tour marketing material examined here and in Peake’s (2007) tour guide research, highlighted the lack of promotion of essential components of an ecotour. This is not uncommon, and previous research into 55 tour operators representing 402 Australian nature-based tours found the experiential qualifications of tour guides’ heavily promoted over formal qualifications, with an emphasis on visitor enjoyment rather than environmental content (Weiler, 1993). Thus, Hervey Bay tour operators today seem to be catering to the mass/novice ecotourist and undertaking superficial endeavors to increase visitor awareness through interpretation (Peake, 2007), rather than focusing on ecotourism principles of sustainability through quality conservation focused interpretation and education.

When the results of this research are considered in their entirety, Hervey Bay whale watching today seems more reflective of the later stages of Butler and Duffus and Dearden’s model, and has perhaps reached the watershed point in the model validated by issues such as:

- Declining visitor numbers;
- Changing visitor typology;
- Increasing competition;
- Decreasing tour operators;
- Declining tour operator commitment through:
  - A lack of quality interpretation; and
  - A lack of recognition of the importance of the tour guide;
- Declining synergy with the protected area managers reflected by:
  - Minimal delivery of conservation and management messages; and
  - Limited support by either stakeholder (management agency and tour operators) for each other.
Butler (1980) and Duffus and Dearden (1990) suggested that when an industry progressed to this mature stage, changes were necessary in the structure of that industry to facilitate renewal, otherwise it could continue to decline. The implications for Hervey Bay whale watching means some operators must specialize to survive (R), others may continue to offer the existing service (C), and some may not be able to compete financially, and are lost to the industry (D) (Fig. 6). These choices for sustainability may also reflect the operator’s underlying motivation. Whale-watching operators remaining in Hervey Bay perhaps fall into two overlapping categories: tour operators who are both economically viable and committed to ecotourism; and those who are primarily economically focused. The continuing decline of Hervey Bay as an industry posits that planners, protected area mangers, and tour operators need to address the issues raised in this article cooperatively and proactively if long-term strategies for a vibrant and sustainable whale-watching industry are to be developed.

Conclusion

For 20 years Hervey Bay has been historically promoted as the “whale-watching capital of Australia.” This research indicates that changing visitor and commercial operator numbers and profiles, increasing regional competition, and a changing relationship with the protected area managers may be symptomatic of a maturing industry that has reached a watershed point in its sustainability. The evolution of whale-watching tourism in Hervey Bay, Australia illustrates the importance of tourism research in planning and management processes. I argue that this approach raises questions about the future viability of the whale-watching industry in Hervey Bay, and has implications for existing and potential whale watching focused industries elsewhere.

Ubuntu in Action

The global growth of wildlife tourism, in particular whale watching, has connected people across continents and oceans, and while still evolving, will need a shared global vision if it is to be sustainable long-term for the benefit of the communities it supports, and the animal it promotes. Global forums, such as the Coastal and Marine Tourism Congresses, facilitate this engagement and allow practitioners, researchers, planners, and students to learn, connect, and collaborate.

The issues that face Hervey Bay whale watching are not unique but are indicative of the possible longer term outcomes for all wildlife tourism operations (Butler, 1980; Duffus & Dearden, 1990). The research findings are particularly pertinent for those in emerging tourism industries (de Sá Alves, Andriolo, & Orams, 2009; Tibiriçá, Birtles, & Valentine, 2009) or those developing tourism as an alternative industry (Springuel, 2009) who have concerns about long-term sustainability. Particularly, the findings reinforced the value of, and need for, stakeholders to connect to each other. This connection will facilitate engagement with, and reflection on, the issues faced by mature tourism industries and will build capacity for developing sustainable practices through shared knowledge, research, responsibility, and experience.

Biographical Note

Dr. Sheila Peake is Academic Program Coordinator for USC International, at the University of the Sunshine Coast, Queensland, Australia. Dr. Peake is an ecologist with research interests encompassing such topics as ecotourism, protected area management, and communication of conservation through the technique of interpretation.

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