

**Whale watching – the roles of small firms in the evolution of a new
Australian niche market**
Chapter for Small Firms in Tourism International Perspectives

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Whale watching – the roles of small business in the evolution of a new Australian niche market

Abstract

This chapter provides two comparative case studies focusing on the roles of small businesses in the development of a new niche market and traces their interaction with small communities. The cases are set within the context of the development of commercial leisure viewing of humpback whales (*Megaptera novaeangliae*) in two coastal communities in Australia. Small businesses have been able to successfully develop a new niche market in one destination, but failed to in the other. These different outcomes are related to the economic developments and benefits in one destination while in the other region, social values appear to have dictated limits to the development of whale watching. The cases also provide insight into the dynamics of entrepreneurial development, the formation of supplier networks and the consequent development of standardized products.

Introduction

This chapter discusses and compares the development of a new niche market in two coastal resort destinations on the East Coast of Australia. The research draws on two cases, part of a larger study focusing on the development of new types of tourism products in established resort destinations. These cases utilize data ‘triangulation’ (Jick 1983) to develop an event history of the development of commercial aspects of viewing of humpback whales in Australia. Data is drawn from in-depth interviews with wildlife experts, industry and community leaders, archival analysis and personal observation. This has allowed a number of key events in the development of this specialized niche market to be identified. The chapter discusses the development of latent demand arising from increasing interest in environmental issues and the

serendipitous recognition by an experienced entrepreneur of whale watching as a new business opportunity. However, the local community was reluctant to see a full development of this business sector in one resort destination while in the other case examined here, many local small businesses were able to benefit from the development of whale watching.

From whaling to whale watching

The development of whale watching in Australia is based on the remarkable changes in general community attitudes to the environment and to the recovery of whale populations after near extinction. Australia, along with many other western countries, has a history of catching and processing whales from small ships that began as early as the late 1700's and is memorably described in *Moby Dick* (Melville 1926). Whale products such as oil and baleen were in fact amongst Australia's first exports (Tucker 1989). Beginning in 1954, land based whale processing plants were established along the east coast of Australia as a regional economic development activity. This type of whaling involved spotting whales travelling along their migration path, intercepting them with small fast boats and towing the carcass back to port. Whaling continued to 1962 when the industry became uneconomic due to falling whale numbers. Whaling stations were located at Eden in New South Wales, Byron Bay in New South Wales and Tangalooma (on Moreton Island) in Queensland. The main target species for whalers was the humpback whale (*Megaptera novaeangliae*) that makes an annual migration from its feeding grounds near Antarctica each June or July and returns in September or October. Several populations of humpback whales have been identified and are classified according to their migratory routes. Humpback whales travelling along the East Coast of Australia are classified as Population V. Whales travel on their migration in small groups referred to as pods.

Methodology

There is a strong tradition for the use of case studies in examining dynamic tourism phenomena. Recent examples of tourism case studies in these areas include the effects of a natural disaster on the Town of Katherine and of the dynamics of change on the Gold Coast, Australia (Faulkner 2000; Russell & Faulkner, 1999). Two basic types of case research, single case design and multiple case designs are noted in the literature (Yin 1994). Multiple-case designs have distinct advantages and disadvantages in comparison with single case designs. The evidence from multiple cases is considered more compelling, and the overall study is often considered more robust. Multiple case study research typically examines a phenomenon with the focus on causation so as to explain the 'how and why' of historically and/or culturally significant phenomenon (Ragin & Becker 1992). However, the conduct of a multiple case study can require extensive resources and time beyond the means of a single student or independent research investigator (Yin 1994). Pearce (1993) suggests that comparative case studies are commonly used in situations with small numbers of cases and large numbers of variables.

The three main techniques used in this research are convergent interviewing, archival analysis and triangulation. Three other research techniques were also used to supplement these primary techniques; face-to-face and telephone interviews as well as affinity group in-depth interviews (Decrop 1999; Hartmann 1988; Oppermann 2000; Ralston & Stewart 1990; Richins 1999).

Convergent interviewing was chosen as the method for use in interviewing. Dick (1987) views convergent interviewing as multistage or cyclic data-collection and interpretation. At each stage or cycle the questions and the interpretation of the responses need only be specific enough to allow the next stage to be designed. The

interpretation of the data converges gradually towards its final form. The convergence occurs both within each interview, and from one interview to another. Both content (subject matter) and process (details of the interviewing process itself) can converge over the course of interviews. Convergent interviewing leaves the content unstructured, but structures the process very tightly. It starts in a very open-ended way, which confers flexibility. The structured process provides a means for dealing with the large amounts of data that is produced.

To use convergent interviews efficiently, an interviewer looks for two patterns in the emerging data. Patterns of convergence or agreement, and discrepancy or disagreement are examined. These provide the criteria for deciding whether to analyse particular data further, or discard them. Each interview terminates when the respondent has no more to say, and the interviewer is satisfied that the data meets three other criteria. Firstly, an overall pattern can be seen in the data, or at least the key information has been identified. Secondly, as far as possible all convergence from prior interviews has been confirmed (or disconfirmed). Thirdly, all discrepancies explained if possible. The series of interviews terminates when fairly clear agreement emerges between all or most people interviewed, and where their differences are explained. The views expressed by those interviewed are seen by the interviewers to converge to one or a small number of distinct views on the topic being investigated.

The second major research technique used in this thesis was **archival analysis**.

Lincoln & Guba (1985) distinguish between documents and records on the basis of whether the text was prepared to attest to some formal transaction. Thus records include statistical data collections and newspaper articles while documents are of a personal nature: diaries, memos, etc.

Triangulation is based on the triangle analogy, which implies that a single point is considered from three different and independent sources. Authors like Jick (1983) consider triangulation as mixing qualitative and quantitative methods, advocating that both should be viewed as complementary instead of rival camps. Triangulation has also received attention in qualitative research as a way to ground the acceptance of qualitative approaches (Denzin 1978). Triangulation as a research technique enhances the trustworthiness of qualitative data (Decrop 2000), although other approaches are also available such as testing rival explanations, looking for negative or atypical cases, or keeping methods and data in context. Triangulation limits personal and methodological biases and enhances a study's generalizability. Four basic types of triangulation have been discussed (Denzin 1978). These are data sources, methods, investigators, and theory triangulation. In this study the triangulation approach adopted is based on method and data triangulation. In addition to collecting data, the researcher sought confirmation from the respondents or other sources that the material collected was valid. This involved providing transcripts and feedback to respondents on the findings of the research.

Figure 1 about here

Early development of a new niche

After whaling ceased on the east coast of Australia in 1962, it was estimated that only 200-500 humpback whales remained in east coast waters out of an estimated population of 15-20,000 prior to commercial whaling (Centre for Coastal Management 1995). This decline in whale populations was a worldwide

phenomenon; the humpback whale became a protected species worldwide in 1966. It remains on the protected species list (Kaufman & Forestell 1993), although limited catches are allowed for scientific research, conducted almost exclusively by Japanese fleets. Currently, humpback whale numbers on the East Coast of Australia are growing at 10% per year.

‘Whale watching’ has been defined as tours by boat, air or from land, formal or informal, with at least some commercial aspect, to see, swim with, and/or listen to any of the some 83 species of whales, dolphins and porpoises (Hoyt 2001). Between 1964 and 1987 when whale watching started in Hervey Bay, there was an increase in environmentalism in Australia and other developed countries. This increasing concern for the environment is attributed (Udall 2000), to a reaction against the rampant developmental ethos of the 1960’s and was heralded by the publication of ‘Silent Spring’ (Carson 1963).

Whale watching began as a non-consumptive economic activity in the 1950s in locations such as California and New England in the United States. A second wave of whale watching destinations began in the 1980’s including operations in New Zealand, Canary Islands, Japan and Norway (Hoyt 2001). Cousteau & Paccalet (1988:23) write that in 1988, whale watching was a significant economic activity in Cape Cod Newfoundland, San Diego, California (300,000 people on land and sea) and Peninsula Valdes Argentina (36,000 per year). In fact they suggested at that time that the “*popularity of whales is such that 'nature safaris' to breeding lagoons are beginning to be problematic*”. A third wave of whale watching destinations became popular in the 1990’s including Iceland, Philippines, Indonesia, Hong Kong, Tonga and Taiwan (Hoyt 2001).

Whale watching has been seen as a wildlife tourism activity and is '*often located under the broad banner of eco-tourism*' (Muloin 1998:201). It is distinct from a simple outing on a boat as whales are a central focus for the trip (Orams 2000). Humpback whales are amongst the largest living mammals, yet the business of viewing them is almost exclusively operated by small companies. Individual boat owners and operators typically conduct commercial whale watching operations. Most commercial operations are water based activities although both air and land based operations are also found. Land based whale watching tends to be non-commercial in nature. At some locations the migrating pods of whales pass very close to high cliffs, or they may congregate there for short periods, making an easy spectacle for people enjoying unrestricted access to cliff top parklands. Water based tours tend to be for ½ a day or a day in length although a number of other formats are available (for example dawn and dusk tours). The duration of tours is largely determined by the proximity of whale viewing areas to the local harbour, although other factors include the degree of expertise of the boat captain and the levels of interest and commitment of the passengers. The boats tend to be quite small, and can be uncomfortable in certain combinations of wind and water conditions.

The overall growth of whale watching between 1955 and 1998 has been rapid as shown in Figure 2 (Hoyt 2001). This information has been based on survey data collected from whale watch operators, tourism departments and researchers by Erich Hoyt. This data must be viewed as indicative only since it is based on a sample survey method. However, the overall pattern suggests that whale watching became significantly more popular in the 1980's and continued to grow in popularity, at least until 1998, when the last survey was conducted. Hoyt estimates that in 1998 whale watching around the world provided direct expenditure of USD\$300 million with over

9 million visitors undertaking commercial whale watching. Hoyt also estimates that whale watch numbers grew by around 14% annually between 1994 and 1998.

Figure 2 about here

Whale watching case studies

Byron Bay is the most easterly point in Australia, and is a key location along the Australian humpback whale migration routes. It combines a high vantage point close to a narrow continental shelf, thus providing ideal conditions for whale viewing. The earliest recorded commercial whale watching activity in Byron Bay occurred while the whale processing plant was still operating.

'...the company that ran the whaling station here, saw people were coming to watch the whales being brought in. So they actually encouraged that as a tourism industry environment. There was a small shop built opposite the whaling station and it sold drinks and that sort of stuff. And it certainly became popular especially on the weekends. And literally hundreds of people would go around the whaling station to see the whales.' Byron Bay Resident.

A photograph of people watching a whale being cut up probably taken in the 1960's was displayed on the walls of the Byron Bay Hotel during a visit by the researcher in 2001.

In June/July 1979, Project Jonah, a Brisbane-based voluntary organization involved in whale conservation, arranged a field trip to look for whales at Cape Byron. Project Jonah was subsequently renamed the Australian Whale Conservation Foundation, and continued counting whale numbers from Byron Bay headland from 1979 to 1998. In

that year the task was taken over by the Southern Cross University Whale Research Centre (SCUWRC). The Cape Byron Trust (CBT) took over of the management of Cape Byron from the Maritime Safety Authority in 1989. In the early 1990's the CBT undertook to promote whale watching from the Cape Byron headland and first ran a very successful Whale Watch weekend event in 1993. This received extensive coverage in local and national media. However local community concerns about environmental degradation caused by the effects of large numbers of visitors on Cape Byron led to this successful event to be discontinued. Land based whale watching, however has continued and is now supported by interpretation from the SCUWRC during the peak of the northern whale migration in June/July. These activities remain free of charge. In 2002 interpretation consisted of whale information leaflets, whale researchers able to provide commentary, hydrophones so that whale 'song' could be heard, and computer plots of whale movements to facilitate better viewing of passing whales.

Currently, one operator conducts water-based commercial tours from Byron Bay on which according to his publicity material it may be possible to view whales close up. These tours cost in the vicinity of \$A 80. The development of water-based whale viewing in Byron Bay is restricted because of the concerns of the CBT about possible negative impacts on the whale population. In particular, access to the water is through land controlled by the CBT. Thus they are able to exercise control over water-based whale watching. Some incidental water based whale watching occurs during scuba diving and kayak tours that take place of Cape Byron. Thus, whale watching as a commercial activity is at a very early stage of its development in Byron Bay.

500 kilometres further north in Hervey Bay, whale watching began serendipitously in September 1987. In that year a husband and wife business team bought a second hand boat and began a fishing tour operation in Hervey Bay. While on a fishing charter, the boat encountered rough weather and motored into the calmer waters of Platypus Bay, Fraser Island in order to avoid discomfort for his passengers. There the boat encountered whales, creating a strong impression on the passengers:

“...basically the reaction of the passengers who were all fishing people who forgot about fishing when they saw the whales and that gave me the idea that maybe, people would be interested in whale watching.” Whale watch Operator

On returning from the first trip, the local television studio and paper were contacted and immediately provided media coverage.

‘So I rang channel 7 (the local TV station in Hervey Bay) and they asked me to come down and do an interview, in the interview they were just mind blown because here were all these people getting off boats’ Whale watch Operator

This resulted in an immediate reaction from the public and further media interest:

‘our phones just went berserk... it was absolutely incredible. So then all the (other) media started coming in’ Whale watch Operator

They began whale-watching tours three days later on his fishing boat to immediate success. As a result competitors began to also offer tours from the local harbour.

‘We leased another boat and between those two boats we carried three and a half thousand people. By the end of that first season there were six boats operating. We were running two of them.’ Whale watch Operator

In the second year (1988) they again operated two boats, one a larger 188 passenger capacity vessel, and carried 11,000 of the 13,000 total whale watchers during the season. In 1989 there were 21 operators offering whale watch tours. In that year, the Queensland National Parks and Wildlife Service issued licences to all 21 operators. Figure 2 shows the number of whale watch passengers visitors from 1988 to 2001, based on official statistics as well as whale watch operator records. The number of passengers has grown significantly since 1987. It can be said that a niche market in whale watching has been successfully established in Hervey Bay.

Figure 3 about here

The adoption process and diffusion process was rapid for whale watching in Hervey Bay

From the very beginning of whale watching here, incredible media interest gave Hervey Bay promotion that no amount of money could buy, and led to thousands of people heading this way for the next whale season (Burger 1996: 94).

Analysis of the development of whale watching

A number of features distinguish the evolution of a niche market in Hervey Bay in whale watch tourism from the relatively immature status of the sector in Byron Bay. Our analysis of the experience documented here of these two resorts is that it is the small enterprises that establish and lead local development of commercial whale watching.

The dynamics of the growth of the new market niche reflect the actions of individual people and also the effect of the social structures in the destination. In the case of

Hervey Bay, the prior effects of the growth of environmentalism in Australia provided a large potential market for whale watching. In addition, the introduction of commercial whale watching was supported by the actions of other organizations such as news television and established companies interested in being associated with 'ecotourism'.

The influence of key people is evident at critical points of the development of whale watching in Hervey Bay. Firstly, the actions of the first husband and wife team are seminal. They had a history of entrepreneurship. They had retired in 1986 after developing and then selling a successful concrete batching company. This company was responsible for introducing a number of innovations into the concrete industry such as patterned concrete. Their entrepreneurial action began whale watching in Hervey Bay. The incident is described as:

'He came home after a really long trip and said "I saw whales and I think we might run a whale watching trip," and I went "Yeah right, how do you know if the whales are still going to be there? ". And he said "Tomorrow I want you to go to the paper and put an ad in, " so I went to the local paper'

Whale watch Operator

Apart from doing the first whale watch tour, they also introduced a number of innovations to the industry including whale spotting.

...we would fill up the plane with toilet rolls and fly out and find the whales and if we found them we would fly back to the boat, we'd give the boat about two hours start and if we flew around the boat three times clockwise then it meant we'd found the whales and then we'd fly off in the direction of the whales and drop a toilet roll for every two miles we thought the boat had to go, if we dropped three toilet rolls it meant they had to go six miles. That was right from day one that's how we signaled the boat... Whale watch Operator

...as well as setting out many of the whale watch standards and, working with other local small businesses to develop a set of service suppliers required for the further development of his business and the whale watch sector.

Yeah. Within two or three we'd changed the whole thing around to ...introduced the major boats. We went out and bought busses, we introduced that, we introduced putting meals on boats to serve passengers where they used to bring a sandwich before. Whale watch Operator

This raises the following question posed by the researcher

... I'd like to talk to you about the later years. Was what everyone was offering fairly similar to the product that you were offering?

Well, everyone pretty much followed us, we set the benchmark, such as to guarantee our trips, which is a big advertising advantage because there's nowhere else in Australia that will guarantee whale sightings and our guarantee is that we give them a free ticket to come back. The only time you wouldn't see a whale is at the beginning or end of the season or if we turn around because of rough weather.

Whale watch Operator

However, the effect of other individuals or organizations apart from the initial entrepreneur is also evident. These include the effect of the actions of Sea World, a marine wildlife research and visitor centre together with the impact of another boat owner and local identity Mimi McPherson. The initial success of whale watching in Hervey Bay is partly attributed to the actions of Sea World and their interest in being associated with wildlife preservation.

Sea World could see the potential in it, and they wanted to be on the right side, see they've got whale there that were captured and they wanted to show sort of wild things too.....

Because Sea World was saying that they were donating, I think, fifteen thousand to conservation and that was there big thing to say that. It was starting to happen where the Zoos and Circuses were having trouble because they had all the captured animals were trained so this was their way of getting o the environmental side of things. Whale watch operator

In addition, the presence of Mimi McPherson (sister of the international supermodel Elle McPherson) in the industry added significant publicity.

If was, funny enough, busier than what it is now, um, Mimi had what was then 'Matilda 2' and she was a very high profile person for the area. There were very mixed feelings from people, they didn't like her or they did like her, you know, but whatever you thought of Mimi as a person, you could never...and I'll disagree with anyone, you could never take away the publicity that she received. She got more free press than the rest of the industry could pay for. That's very, very sorely missed and it's been evident from the marketing trends since her departure. So, good publicity, bad publicity, whichever way you want to look at it, it was all publicity and it was brought about by Mimi McPherson and whale watching Harvey Bay and it was all that, you know, that fantastic coverage. Whale watch operator

Finally, the legislation determining the industry capacity was another important factor impacting on small operators.

So, then in 1990 they decided that it would become a marine park, and because we saw seven pods of whales, we recommended that no more than three boats) go through each pod so they put out twenty one permits, which was way too many and we got an influx of boat here. Whale watch operator

The development of whale watching in Byron Bay developed in quite a different manner. However, the underlying dynamics maybe described again by the interaction of individual actions and the structure of social organization in the destination.

In comparison to Hervey Bay, the key individuals in Byron Bay have resisted the development by small local businesses of commercial whale watching. The initial interest in whale watching in Byron Bay was derived from the interest of a whale

conservation group, Project Jonah later the Australian Whale Conservation Foundation. A member of Project Jonah and whale expert described the early history of whale watching in Byron Bay...

And after we've done that stuff (antiwhaling campaign) for about 18 months, someone said let's see ourselves a whale. There was no such thing as commercial whale watching anywhere at all so we decided to have a look for whales and the options were to go to Tangalooma because there was a whaling station there so there must be whales around, or go to Byron Bay because there was a whaling station there and both of those (whaling stations) closed in the mid-60s. This was in 1979. So we decided on Byron because it had a pretty good observation. And we went down there in the hope of seeing whales. Whale expert

Whale watching in Byron Bay was also influenced by the actions of the Cape Byron Trust. This organization has acted to reduce the commercial nature of whale watching in Byron Bay on at least two occasions. In the early 1990, a whale watching weekend festival was organised on the Cape Byron Headland. The initial success of this whale watching promotion led to unwanted impacts on the amenity of Cape Byron and as a result the festival was discontinued.

*As far as how (whale watching) developed from a land-based point of view, the Cape Headland Reserve Trust used to actually promoted land-based whale watching but it got to the stage that we created a monster that we couldn't manage. It used to be that on a good Sunday we would get in excess of 12,000 people on the Cape and it got to the stage where parking was totally out of control, toilets were overflowing, people were getting grumpy because they were getting their cars booked for illegal parking they couldn't get up there the roads were blocked we were getting vegetation damage, they were safety issues about people climbing over some of the barricades, climbing down the rocky faces and things so it got to the stage that the Trust made a conscious decision to downplay whale watching, because they used to have what they called whale watch weekend. **Park ranger***

A second cause of restricted supply of whale watching capacity is due to the concerns about commercial impacts by the Cape Byron Trust.

*because this reserve has the only beach access and we control that, it's fairly limited for growth because we are not allowing any more licences for vessels to go out. And one of our main aims is that this is such a good land-based whale watching area why encourage boats? **Park Ranger***

Discussion

Whale watching in Hervey Bay began at a propitious time. Public goodwill towards whale watching already existed, and the attention given by the media to the new opportunities to see whales close up rapidly increased the number of visitors. Thus the effect of prior communication and activity by environmentalists created a latent interest in whales that subsequently allowed the rapid development of whale watching by entrepreneurial small business owners.

We can see from the case studies that other operators rapidly imitated the entrepreneurial actions of one operator in Hervey Bay. The new operators offered similar products following the pattern of suppliers networks previously established. This led to the creation of a commodified product as soon there were many operators offering the same experience. Later, the implementation of whale watch regulation effectively ensured that the standard product was 'locked in'. Development of whale watching in Hervey Bay is dependent on the actions of individuals as well as the interaction with existing structures and organizations and the creation of new structures and organization.

However, in the case of whale watching in Byron Bay, a different set of circumstances meant that entrepreneurs were not able to develop marine whale watching. The major resource required for whale watching in Byron Bay, (Cape Byron Headland) was controlled by a community organization and hence removed from commercial exploitation. Because the local community was aware of whales and was pro-environment the community also had a number of values and beliefs that were inconsistent with commercial whale watching. As a result, whale watching in

Byron Bay did not develop into a specific commercial activity. However, it may be examined as the action of individual people within a community structure.

The actions of an entrepreneur have established a niche tourism market in Hervey Bay. However, imitation by competitors in Hervey Bay is inhibiting the potential for further growth. The nature of the product in Hervey Bay is undifferentiated making it difficult to attract new market segments. Furthermore, the competition is increasing as other resorts on Australia's East Coast have also developed whale watch tourism based on similar types of boats. Hervey Bay's special advantage is that the whales stay for periods of up to a week in the area rather than passing on their migration as is found in other destinations. There are a number of potential areas for development of new products in the region but there is little evidence of it. In fact competition in Hervey Bay appears to be hampering further growth.

The tourism industry here has never worked in total co-operation, but with the advent of big investment it seems everyone is working individually to secure for themselves a larger share of the cake, rather than working together to try and increase the size of the cake. The growth of the whale watch industry is mainly due to the individual persistence in the market place, and not from coordinated or united approaches. There are those operators who simply do not believe a united approach would benefit them (Burger 1996: 94).

About the only thing we do together is fund \$7000 worth of television advertising and promotion, not tied to any one vessel and in the past even this has been the cause of dispute. Neither does any other sector of the Hervey Bay tourism industry offer support even to such meager joint promotion (Burger 1996: 95).

In 1995 capacity increased by 60% as some local operators invested heavily in the industry with new vessels at the same time, as capacity usage was only 50% (May 1996: 154).

This competition operates both within the whale-watch sector in Hervey Bay and between this sector and others in the region (notably accommodation operators). A

focus on new product development opportunities may enable this competition to be reduced.

Conclusions

This chapter has examined the roles of small businesses in the development of a new niche market and traces their interaction with small communities. Small businesses have been able to successfully develop a new niche market in one destination, but failed to in the other. In one region the benefits and development were primarily economic in orientation while in the other region, social values appear to have dictated limits to the development of whale watching.

The context within which small businesses can develop a new commercial niche is complex and this chapter has highlighted their interactions with the community, supplier networks and the marketplace as important factors in their success. The recognition of a new product niche does not necessarily mean that it will be successfully developed to its full potential. Instead, the values of the dominant stakeholders in the community may inhibit the growth of the new product.

Additionally, the case study suggests that the supply requirements of an entrepreneur developing a new niche begin the formation of a network of supplier relations that increases the possibility of other competitors entering the market.

A number of practical and theoretical issues arise as a result of this case study that merit further research. The case suggests that a new product developed by entrepreneurial actions may become commodified as a result of the development of supplier networks. As the new product becomes established legislative responses may further define the nature of the product thus tending to define standards and reinforce commonality between suppliers. The case also suggests that the interaction of small

businesses with their surrounding social and economic structure is critical in understanding their development over time.

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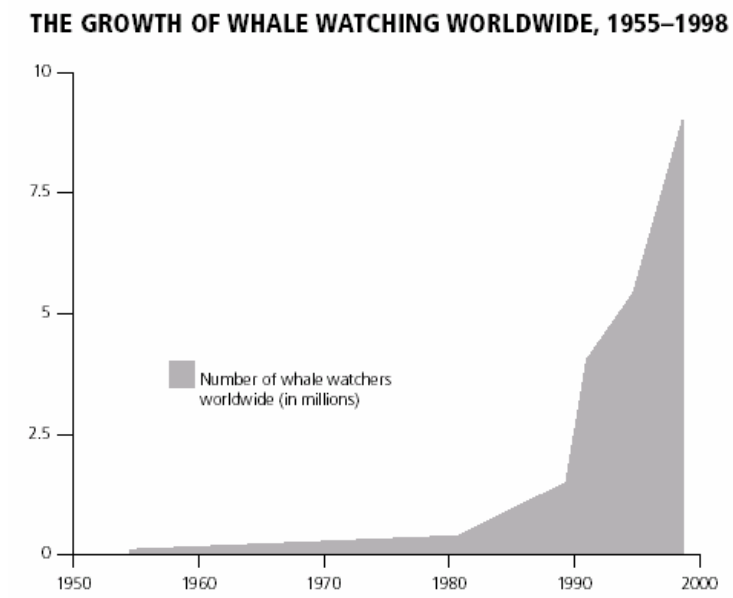
Sage Publications.

Figure 1: Map of whaling and whale watching areas



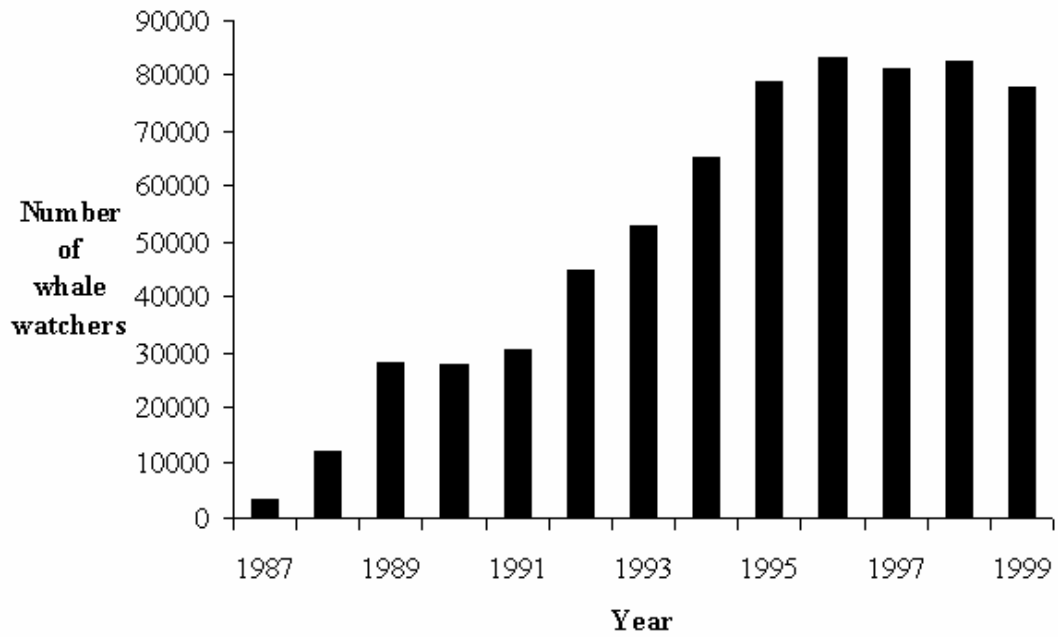
Figure 4.6 Location map for case studies: Authors work

Figure 2



Source: Hoyt (2001: 12)

Figure 3 Whale watch passengers in Hervey Bay 1987-1999



Source: Queensland Parks and Wildlife (2002).