Catalogue of case studies

July 2022
Case study

Cabo Trek:

Organising the first whale festival in Los Cabos, Mexico

WHS criteria: Promoting Collaboration and Community Engagement; Celebrating Cetaceans.

Topics: Community outreach, Promoting local culture and heritage, Collaboration, Conservation.

Images by Cabo Trek.

The company

Cabo Trek was founded by Philipp Moser, who has worked in many locations around the world, but once he arrived in Los Cabos in Baja California Sur, he never left. Cabo Trek offers different activities, including whale watching from Cabo San Lucas, Magdalena Bay, and San Jose del Cabo. They aim to reconnect people with mother nature and work towards an understanding and consciousness of the ocean.

The first whale festival in Los Cabos

The idea for the first whale festival started with the need to involve the local community and tourists in the conservation and protection of whales. The main goal of the festival was, through celebrating whales, to make people aware of their beauty and show the need to protect them.

Activities during the festival included presentations from the scientific community, local authorities and protection groups, as well as educational activities and art.
Challenges

Being the first festival, the biggest challenge was to get the message out to as many people as possible, including both tourists and the local community. For that reason, Cabo Trek organised some activities in strategic public areas of the city, which helped to raise awareness of the festival but also required authorisation. It wasn’t easy for Cabo Trek to gain support for this use of public space, as the government didn’t believe that educating people about the protection of whales would have any economic benefit.

Another challenge was painting a mural on the wall of the main beach to illustrate the most representative marine animals of the Marine Protected Area (MPA). It was very difficult to commission the mural, since Cabo Trek were unable to pay the artists or reimburse their travel costs, only provide a small amount of food and essentials. However, various local entrepreneurs supported the project by donating the materials, and local artists agreed to complete the painting at no cost.

Lessons to pass on

Cabo Trek would advise organisers of similar events to start planning at least six months in advance, especially if they intend to use public spaces and need to obtain authorisation for this in time.

If possible, financial support should be secured to cover travel and meal expenses for the people who will be involved in the event.

The festival was well-publicised in the media, which was an important part of Cabo Trek’s strategy. However, for better results, publicity efforts should begin a few weeks before the event.

The inclusion of art as an environmental education tool exceeded Cabo Trek’s expectations! For the next festival, it would be valuable to organise specific training and environmental education activities for boat captains.
Impact and achievements

Cabo Trek believes that the festival’s most important achievement was the social network that it created. For the first time, different whale watching companies and various sectors of the community such as NGOs, government, and researchers came together to learn, teach and talk about whales, reaching different audiences of all ages.

As a result of painting the festival wall, the local artists became well-known and were hired to paint more murals of marine life in the region and neighbouring towns.

Cabo Trek has observed that the number of reports of illegal activities against marine life increased after the festival, as people learned the local rules and became more active in protecting the wildlife.

Members of the local community have also been asking Cabo Trek when the next whale festival will be, which demonstrates the success of the event and recognition of the importance of whales to the region.

Contact information

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Case study
Ilha Blue:
Working towards being 100% locally owned and run

WHS criteria: Promoting Collaboration and Community Engagement; Working Towards Sustainability.

Topics: Community outreach, Giving back to the community, Equal opportunities, Promoting local culture and heritage.

Images by Ilha Blue.

The company
Ilha Blue was established in 2012 on Ilha de Mozambique (the former capital of Portuguese East Africa and modern Mozambique). The area is an important breeding ground for humpback whales between late July and late September. During this period, Ilha Blue offers whale watching tours on a traditional dhow.

Ilha Blue sees engagement with local people and culture as a way to unlock tourism potential while also supporting the community to transition out of poverty. Making a commitment to responsible tourism is both a moral and strategic decision for Ilha Blue.
Involving and acknowledging the local community in everything

Ilha Blue’s goal was to help the local community benefit from developing tourism. Initially, whales were not a prominent tourist attraction; however, this changed several years later, when the area was discovered to be a significant humpback whale birthing site.

Now, from late July through to the end of September, Ilha Blue arranges day trips to see the whales. These trips are conducted on sailing dhows (traditional sailing vessels invented prior to 600 AD) and crewed by local sailors. However, they do not consider themselves a whale watching operator, but rather a community engagement organisation that also offers whale watching tours.

When Ilha Bue was first established, tourist activities in the area largely excluded local participation. Non-local guides were preferred over local guides as they were thought to appear more professional. This resulted in the local community receiving less work and lower wages.

Ilha Bue decided to promote and focus on local historical perspectives, culture and lifestyle, rather than the Portuguese view of history and idealisation of colonial values (e.g. educated outsiders having advantages over locals). They achieved this through capacity-building and empowering activities, as well as collaborations with like-minded people. This has reduced discriminatory and exploitative practices and replaced them with more equitable alternatives that better value local people and their distinctive culture.

Ilha Blue also addressed the need for better employment by providing meaningful and permanent jobs, with well-above standard conditions, plus the chance to earn a bonus. Doing this has helped to raise pay and conditions across the local tourism industry.
Challenges

Ilha Blue has stated from the outset that their aim is for the company to be 100% owned and operated by people local to Ilha, and they are disappointed (but not entirely surprised) that this has not yet happened. The reason largely comes down to a skills shortage, but things are changing.

With their support, five employees are undertaking university education in administration, hospitality management, human resources, and tourism/international development, and it is hoped that this will equip them with the skills, knowledge and confidence to take up the challenge of running Ilha Blue in the future.

In the meantime, the founders of Ilha Blue have established a new company, Blue Zissou, which will partner with Ilha Blue and support marketing, financial management and other essential services for as long as required.

Impact and achievements

Ilha Blue can proudly say that local people and their culture are at the centre of Ilha’s tourism offerings. More than ever before, what’s on offer to visitors is the promise of a fair and enriching confluence of tourists and local people.

Their dedication to providing better employment for the local community has also helped to raise wages and working conditions across the country.

For a small business like Ilha Blue, this is a significant achievement, and their efforts were formally recognised in 2017 with a Responsible Tourism Award, presented to Ilha Blue at WTM in Cape Town.

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Case study

Auckland Whale and Dolphin Safari:

How data collection on species led to a reduction in ship strikes

WHS criteria: Encouraging Respectful Human-Cetacean Coexistence; Working Towards Sustainability; Developing Research, Education and Awareness Programmes.

Topics: Environmental sustainability, Research, Conservation, Protection, Collaboration.

Images by Auckland Whale and Dolphin Safari.

The company

Auckland Whale and Dolphin Safari (AWADS) operates from Auckland, New Zealand. They aim to inform and inspire every passenger on their safaris with a range of interactive presentations and the chance to get involved hands-on with science. They have a number of visuals on board and even a small library of books about marine wildlife and other information for passengers to browse.
Impact and achievements

AWADS share their information with researchers and allow students to collect data on board their safari vessels. It became clear to AWADS that data collection during whale watching excursions can be extremely valuable.

A key piece of research conducted by University of Auckland researchers, together with sightings data from AWADS, led to a reduction in ship strikes with Bryde’s whales in the Hauraki Gulf. Data collected during tours was used to help classify the New Zealand coastal population of Bryde’s whales, with less than 250 individuals, as Critically Endangered. Previously, the population had been classified as Data Deficient. This re-classification of Bryde’s whales was an integral part of the case to reduce ship strikes in the Gulf, along with research on whale behaviour and movements, and cause of death.

In 2013, this research led to the introduction of the Hauraki Gulf Transit Protocol by Ports of Auckland (POAL), the shipping industry, New Zealand’s Department of Conservation (DOC), and Auckland University researchers. The protocol consists of a voluntary speed restriction (10kn) in shipping lanes within the Hauraki Gulf Marine Park, as well as a system in which sightings are reported to Ports of Auckland Harbour Control, who then broadcast GPS coordinates of sightings to all other vessels so they can avoid the area or reduce speed.
Challenges

Finding a workable solution to reduce ship strikes presented an initial challenge. At the development stage, Rochelle Constantine, from the University of Auckland, considered the possibilities of either slowing vessels or rerouting them. Rerouting would have been a difficult option, based on the likelihood of whales changing their behaviour and active areas; therefore, slowing vessels emerged as the preferred option.

Matt Ball, from Ports of Auckland, encountered a different kind of challenge in dealing with an industry whose finances could be significantly affected by an international protocol. This is one reason why the voluntary protocol for a speed reduction has been successful, as it has the advantage of greater flexibility and a reduced cost compared to an international protocol or rerouting of ships.

Communication across this international industry also made it difficult to introduce the protocol. Significant effort was required from Ports of Auckland to get the message out to everyone, with many ships coming into Auckland. It involved a long process of delivering communications to all shipping lines, ensuring that pilots were involved and discussing the new protocol with captains.
Lessons to pass on

AWADS recognises that collection of data over long periods is a valuable asset that can be used for multiple research purposes. Data collection doesn’t always require a high time investment from whale watching operators, as it can be completed during viewing times.

Providing research data to scientists and offering whale watching vessels as a platform of opportunity means that operators can play a significant role in contributing to research, which is the basis for creating change.

For Ports of Auckland and the University of Auckland researchers, communicating with many stakeholders within the affected industry was a challenge, but vital in order to gain support and feedback.

Voluntary protocols can be a great option where an affected species is at significant risk. It reduces the amount of time it takes to get an effective solution into place, meaning more whales’ lives have been saved. Official channels can take significant funding and time to get protocols in place which, with the right communication, can be done on a voluntary basis in some circumstances and be as effective.

Impact and achievements

Since the implementation of the Hauraki Gulf Transit Protocol, the average speed of ships has reduced from 14.2 knots to 10 knots, which has helped to reduce ship strikes significantly.

There have been no known Bryde’s whale deaths due to ship strike since 2014, compared to an average of 2.3 deaths per year before 2013 and prior to the protocol being put in place.

Contact information

If you would like to learn more about the company and this initiative, check out their website or contact them via:

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NZ (Free): 0508 DOLPHINS (365 744)
Case study

Captain Dave’s Dolphin and Whale Watching Safari:

Rescuing animals from entanglements

WHS criteria: Working Towards Sustainability; Developing Research, Education and Awareness Programmes.

Topics: Environmental sustainability, Conservation, Protection, Education.

Images by Captain Dave’s Dolphin and Whale Watching Safari and Carol Ann Sheetz.

The company

Captain Dave’s Whale Watching has been running for over 20 years from Dana Point, California and is owned by Captain Dave and his wife Gisele. To them, nothing compares to sharing the beauty and wonder of sea life, and being able to provide people with lifelong memories is a source of pride and joy for them. Captain Dave is also a documentary maker and filmed the award-winning documentary Wild Dolphins & Whales of Southern California. The company organises regular beach clean-ups and multiple other activities to give back and protect the environment.
Saving animals from entanglement

In 2008, Captain Dave developed Orange County’s first whale disentanglement group, after realising that there was no local network and no local responders to address the issue of cetacean entanglement in the area where he operates.

The team received NOAA-sponsored training, and special equipment and a dedicated vessel were purchased. The issue of entanglement is discussed during every Captain Dave’s Whale Watching tour to make passengers aware of this problem.

So far, Captain Dave has been involved in 15 entanglement incidents. In 2010, a badly entangled gray whale, who received the nickname Lily, made national headlines when she stranded close to Dana Point Harbor. To raise awareness of the issue, Captain Dave decided to write a book called ‘Lily, A Gray Whale’s Odyssey’. Shortly after the story of Lily was published, Captain Dave helped with the disentanglement of another whale nicknamed Bart.

Because of his work, Captain Dave is frequently called upon as a guest speaker and has been featured on the Ellen Show, CBS Morning News, and local network affiliates for his conservation efforts and his success in disentangling whales.
Challenges

The press coverage of disentanglements was not received well by local government authorities, who felt it gave the fisheries a bad name. Captain Dave’s company was asked to sign a statement that they would not alert the press when an entangled whale had been spotted. They declined and it became difficult for the group to receive help from the government until new authorities came in. While press coverage is still not welcomed, it is now tolerated.

Lessons to pass on

Captain Dave’s Whale Watching believes that it’s important for any businesses starting an initiative like this to respect those people who are already engaged in the process. They recommend getting the word out through customers and local press, and not trying to be a ‘one-man show’.

Impact and achievements

Since the OC Whale Disentanglement Group was established, there is now a much better network of members and volunteers along the coast who work together.

Tens of thousands of people have become aware of the issue thanks to talks, both in the media and during whale watching tours, and as a result of Dave’s book about Lily the gray whale.

Contact information

If you would like to learn more about the company and this initiative, check out their website or contact them via:

https://www.dolphinsafari.com
https://www.dolphinsafari.com/whale-rescue

Call via 1-949-577-8403
Text via 1-949-763-4488
Case study

Five Star Whale Watching:

How reporting on whales can save them

WHS criteria: Encouraging Respectful Human-Cetacean Coexistence; Promoting Collaboration and Community Engagement; Working Towards Sustainability.


The company

Five Star Whale Watching operates from Victoria, Canada. They believe in being a well-rounded and educated company, contributing to sustainability, community engagement and education. For them, every customer is a vessel for positive change. That’s why they believe that leaving each guest with an interconnected perspective into matters of the marine environment is one of the most powerful things they can do.

The Whale Report Alert System

Five Star helps ensure that responsible practices are adhered to by hoisting the Whale Warning Flag when encountering whales, dolphins and porpoises on the water. The project was initiated by the North Island Marine Mammal Stewardship and has been adopted in the Salish Sea by the San Juan County Marine Resources Committee, in order to alert boaters to the presence of cetaceans and prompt them to follow marine mammal regulations when transiting the area.
Five Star is an active member of the B.C. Cetacean Sightings Network and reports sightings in real-time to the Whale Report app. Due to being on the water on a very regular basis during whale watching season, they act as sentinels and help to ensure the wellbeing of the whales. As a trusted observer of the Whale Report Alert System, Five Star’s reports are used to warn large commercial vessels about the presence of whales, so they can either alter their course or slow down to reduce the risk of collision and noise disturbance.

Five Star is also a member of the Pacific Whale Watch Association (PWWA). The different members routinely support each other in acting as sentinels and behave as a respectful, collective entity while on the water in the presence of marine life (e.g. taking turns viewing wildlife, time guidelines). This includes the sharing of information through radio and communication networks about significant or novel behaviours in animals sighted (e.g. appearance of illness, entanglements) and long-term conversations into topics such as maintaining best practices within the industry and other conservation issues.

Challenges

The biggest challenge for Five Star has been educating private vessels (who account for the vast majority of infractions) on how to be responsible and respectful when encountering whales.

Working with local outreach groups, on the water monitoring and education organisations (Soundwatch and Straightwatch), posting signage, and engaging with boaters have all been key to improving boater education.

Lessons to pass on

Five Star believes that education is key and that educating boaters on the responsible way to act around whales and other marine life is the only way to help increase awareness and ultimately improve behaviour.
Impact and achievements

Five Star has already seen a reduction in vessel infractions and an increase in responsible behaviour and awareness, although they recognise that there is still much work to be done.

One unique aspect of this project has been the cross-boundary collaboration between mariners. Five Star has been impressed by these efforts, including reports by whale watchers and other vessels, cooperation with both the Canadian and US Navy, and reports received by commercial traffic such as ferries, container ships, and even tankers – all designed to protect whales.

Contact information

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Case study

Cabo Trek:

Inspiring youth to protect the oceans

WHS criteria: Developing Research, Education and Awareness Programmes.

Topics: Education, Community outreach, Giving back to the community.

Images by Cabo Trek.

The company

Cabo Trek was founded by Philipp Moser, who has worked in many locations around the world, but once he arrived in Los Cabos in Baja California Sur, he never left. Cabo Trek offers different activities, including whale watching from Cabo San Lucas, Magdalena Bay, and San Jose del Cabo. They aim to reconnect people with mother nature and work towards an understanding and consciousness of the ocean.

Youth education project

According to Cabo Trek, environmental education connects people to nature and raises awareness of issues impacting the planet upon which we all depend. It also inspires actions that we can take to improve and sustain our environment.
Giving back to the community of Los Cabos was already one of Cabo Trek’s goals. They decided to create an environmental education project to deliver presentations to children and teenagers in the local orphanage and schools about marine conservation, with a focus on cetaceans. In addition to these presentations, Cabo Trek would take the children and teachers for a whale watching tour.

The local orphanage, which was created in 2016 for children between 5-15 years old, was interested to meet the Cabo Trek team and discuss their proposal. The coordinator was very concerned with environmental education and acted as a great motivator in facilitating the project, as well as encouraging the participation of all teachers in the activities.

Lessons to pass on

Cabo Trek advise anyone organising an environmental education event to contact schools before the period when the annual school calendar is created, so that the activity can be included in the schools’ official planning.

Organisers should also arrange a meeting with teachers and inspectors beforehand, to discuss the goal and logistics for the event. Teachers should be directly involved in developing and delivering the presentations and activities.

To help the children reinforce their learning through creativity, teachers can encourage them to produce drawings and/or writing after each presentation, or take part in play activities (preferably in groups).

Challenges

The only challenge that Cabo Trek encountered was not being allowed to photograph the children’s faces, which meant that they had to take all photos of the activities from behind the participants.
Impact and achievements

Thanks to the project, many of the children from the orphanage were able to see whales for the first time. Cabo Trek found it a unique and gratifying experience to be able to provide this special moment for children who unfortunately had already been through many challenges in their young lives.

As far as Cabo Trek is aware, this initiative was unprecedented in Los Cabos. In total, approximately 50 children and teenagers and 10 teachers participated in the project, and the children from the orphanage sent a special message of thanks to Cabo Trek for the experience.

Some teachers and students involved in the project have also participated in beach clean-ups to help clear the tons of waste that accumulate on local beaches after hurricane season. These clean-ups are a local initiative that Cabo Trek always supports, and the team use the clean-ups as an opportunity to discuss and raise awareness of the issue of marine pollution and the impact that this has on wildlife.

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Case study

Cape Ann Whale Watch:

Continuous development to provide the best on-board education

WHS criteria: Developing Research, Education and Awareness Programmes.

Topics: Education, Citizen science, Conservation.

Images by Cape Ann Whale Watch.

The company

Cape Ann Whale Watch (CAWW) was founded in 1979 as the first whale watching company in Gloucester, USA. CAWW is the only whale watching company in the North-East USA to feature a comprehensive educational program completely integrated into the whale watch. Their ultimate goal is to have each passenger leave the vessel with a greater understanding of the whales and their environment, with the hope that it will spark a desire for the passenger to support marine conservation in their own life.

Providing the best on-board education

CAWW’s education program was originally started 25 years ago with the help of Cynde McInnis, another WCA Partner. After Cynde, Jamie McWilliams was appointed as Education Director. Jamie is constantly looking for ways to improve and modify the education program to make sure that it's as engaging as possible.
In addition to having a naturalist on the microphone and available for interactions throughout the trip, the company also has educators (interns) on board during every tour.

The educators are responsible for:

1. Delivering biology-focused education on the way out to see the whales.

2. Conducting research throughout the time spent watching whales, which includes:
   - collection of qualitative and quantitative behavioural data
   - plankton tow
   - water quality exam
   - listening to the hydrophone
   - photo identification

3. Delivering conservation-focused education on the way back from the trip.

The educators use a variety of different teaching tools to interact with the passengers in small groups, such as:

- a model of the feeding grounds
- baleen and teeth
- audio of whale sounds
- a model of a humpback whale, which is used to discuss characteristics and similarities to humans
- net effect/disentanglement
- plastic pollution
- plankton and water samples
- a fluke matching game
Challenges

COVID-19 had a huge impact on CAWW, resulting in the company needing to suspend a large internship program. Instead, they utilised their deckhands, naturalists, and a small number of volunteers to continue developing the personal connection with passengers.

One of the educational topics that CAWW has struggled with is the issue of marine debris/plastic pollution. Although Jamie has discussed ideas with interns, passengers and colleagues, and redesigned the education tool several times, she still isn’t completely satisfied with the presentation. It has also been one of the hardest subjects for the interns to engage with passengers about. Improving the delivery method for this information is something that CAWW works on every season.

Lessons to pass on

CAWW strongly believes that the key to their education program is the passion that lies behind it: not only from Jamie as the Education Director, but also the interns, entire crew, and even regular passengers who all strive to help keep the program up-to-date and engaging.

Developing new ideas and creating new education tools is a constant process, most of which is done through trial and error. When Jamie is thinking of a new concept for using the teaching tools, she will typically outline it on paper, create a mock teaching tool, present it to the crew for feedback, make adjustments, launch it on the boat, then fine-tune any of the details. This can also mean going back to the drawing board and creating a completely new concept at times.
During one season, an intern created a teaching tool to discuss sound, exploring how whales utilise it and addressing the anthropogenic threat. At the end of her discussion, the intern gave out surveys to the passengers which were a little more open-ended than the ones that the crew regularly used. Jamie found these surveys extremely helpful, not only for seeing how the teaching tool was received, but also by giving passengers an opportunity to expand on the overall program in more depth. This helped to generate ideas on how to improve existing teaching tools and also what topics the passengers would like to hear more about.

For any companies considering a similar education program, whether starting from scratch or just improving current concepts, Jamie would strongly suggest something similar! Additionally, she would encourage anyone involved in educational activities to “keep the fire lit” – in other words, continually think about how a presentation can be improved and made more engaging.

Impact and achievements

CAWW is most proud of the way that their educators and naturalists interact with the passengers in small groups to help them feel more connected to the trip and, therefore, the animals. The boat is run with passion from the naturalists, the deckhands, the captain, the owner, and the educators.

To measure impact, the company has a survey on the back of the boarding pass that they ask all customers to fill out. It asks about the overall experience, what the individual learned, and what it has caused them to think about conservation wise. The surveys are reviewed at the end of each trip. CAWW has found that, even on trips where (according to passengers) the whale sightings have been “mediocre” or “average”, the passenger experience is heightened because of the education and personal interactions.

Contact information

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Case study
Eagle Eye Adventures:
Development of an educational non-profit

WHS criteria: Developing Research, Education and Awareness Programmes; Promoting Collaboration and Community Engagement.

Topics: Education, Community outreach, Conservation, Collaboration.

Images by Eagle Eye Adventures.

The company

Eagle Eye Adventures is located in Campbell River, British Columbia, Canada. In addition to responsible whale watching, they also offer general wildlife watching and grizzly bear expeditions. They conduct tours in a ‘whale wise’ manner, interacting with marine wildlife respectfully in a way that causes the least amount of disturbance possible.
The development of an educational non-profit organisation

A group of tour operators in Campbell River, including Eagle Eye Adventures, decided to start their own non-profit organisation for educational interaction, with the aim of engaging people in their local community, school students, and tourists.

The non-profit is run by Eagle Eye Adventures and three other whale and bear watching companies that meet on a monthly basis. The members of the NGO share ideas with each other and run projects for the good of mother nature; for example, they are currently cleaning up 300km of coastline in the region.

NGO activities

At the moment, the NGO is working on a two-part Marine Naturalist Training Program for the whale watching industry that will become the standard for Transport Canada. The course will be used in schools and people will be required to pass the test before they can start working in the industry.

The course will cover the following topics:

Part one: General Cetacean / Pinniped information and facts (4 hours)

- Types of marine mammals found in BC waters
- How to identify different types of whales
- Food, and predators
- Seals, sea lions, Northern resident killer whales, Southern resident killer whales, Transient, offshore killer whales, porpoises, dolphins, otters, Grey whale, Humpback whales, Minke whale, among others
Part Two: Professional standards rules / regulations, as well as the risks facing marine wildlife in BC waters (4 hours)

- Current risks and mitigation strategies
- Current rules and regulations (purple flag, closures, approach speeds, whale flag)
- Apps and other reporting tools (whale desk, Ocean Wise app, PWWA app)
- Enforcement agencies and roles
- General safe boating and boating education
- Entanglement / boat strikes, etc. – how and what to report
- ‘See a blow, go slow’ campaign
- Whale trail and increased interest in shore-based whale watching
- Public vs. industry-only access to ongoing reporting of whale locations
- Public and guest perception regarding real or perceived close-up photos on brochures and social media
- Conservation through education and exposure to marine mammals

The organisation is also working with North Island College on a school project to raise awareness of how to preserve a future with cetaceans, best practices on the water, and how to keep the different types of orcas apart.
Challenges

The greatest challenge that the organisation has encountered is securing the financial aid necessary to carry out projects. Currently, they do not receive any support from the city, and funding for projects comes from different sources. The government provides a small amount of funding for the coastline clean-ups, while some other projects are sponsored or taken over by the Rotary. The companies running the NGO have to fund most of the projects themselves.

Lessons to pass on

Eagle Eye Adventures recommends that businesses establishing a non-profit together should "start smart" and have respect for each other. They recognise that it can be difficult when each member of the organisation has a different mindset and ideas but, in their experience, this can be resolved through discussion and compromise, to the benefit of everyone involved.
Impact and achievements

The organisation has ordered a life-size whale that will have a permanent spot on the Campbell River seawalk for educational purposes. They are now part of The Whale Trail, which starts in the USA, and the NGO is making signs for the seawalk so that people can identify different species when engaging in land-based whale watching.

Contact information

If you would like to learn more about the company and this initiative, check out their website or contact them via:

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001-250-286-0809
Case study

Eagle Wing Tours: Educating the next generation of environmental stewards

WHS criteria: Developing Research, Education and Awareness Programmes; Promoting Collaboration and Community Engagement.

Topics: Education, Community outreach, Conservation, Collaboration.

Images by Eagle Wing Tours.

The company

The owners of Eagle Wing Tours believe that, by educating people about the Salish Sea and its wildlife, they will inspire people to make more environmentally responsible choices. Eagle Wing Tours operates from Victoria in British Columbia, Canada. They have won multiple awards for building ocean awareness through tours, education and outreach programs, promoting and practising environmental sustainability, and directly supporting conservation and research activities.

Education outreach program

In fall of 2018, Eagle Wing launched an education outreach program aimed at Grades 4-8, in partnership with schools and marine educators in the Victoria region. The program combines classroom learning, experiential activities and critical thinking exercises to ignite a passion for ocean conservation among schoolchildren.
The content of the program is integrated with the British Columbia school curriculum and tailored to meet the specific needs of each teacher.

Content focuses on the natural history of the Salish Sea, historical culture and Indigenous perspectives, and current culture, including natural resources and the economy, environmental stewardship, conservation, sustainability and more.

The program’s three learning sessions are led by Eagle Wing’s education team and include: a classroom introduction to the Salish Sea, a guided wildlife tour on one of their catamarans, and a hands-on learning session with activities such as a food web game, exploring tidepools, and more.

In the final part of the program, facilitated by the Royal BC Museum, each classroom presents an artifact they’ve created that reflects their understanding of and connection to the Salish Sea.

This short movie explains more about the program.

Challenges

The program was on hiatus during the fall/winter of 2020 due to COVID-19, but resumed in fall 2021. The hiatus was used to expand the education team at Eagle Wing, create a detailed program manual, and welcome two additional partners: Ocean Networks Canada, which provides educational content support, and Pacific Northwest Transportation Services, which provides carbon-neutral bus transportation for the students.

Lessons to pass on

Eagle Wing recommends working closely with partners, especially the schools and teachers, to build trust in the goals of the program as well as the expertise, professionalism and leadership of those organising and delivering it.

When Eagle Wing was developing their program, they provided substantial documentation to assure school officials that on-board sessions would be safe and educationally effective for students. To aid with this familiarisation process, Eagle Wing routinely hosts teachers and other school officials on-board the teaching vessel at the beginning of each fall session.
Impact and achievements

By spring 2022, more than 4,000 children from 160 classes had participated in the program, which is consistently earning rave reviews from students and teachers. One school principal said: “The first-hand sensory experience of being out on the water sparks student excitement and curiosity. Cultivating a sense of wonder and connection with the natural world in young people is vital to creating a more sustainable society. Eagle Wing programs help our schools do just that!”

Future goals

The goal of Eagle Wing is to steadily expand the education program to more than 10,000 students per year by 2030. “Education on and off the water is essential to ocean conservation,” says Eagle Wing Tours co-owner Brett Soberg. “This program fulfills a long-time dream for us. It’s a tremendous success, thanks to visionary partners equally committed to a common end goal—to inspire the next generation of ocean stewards.”

Contact information

If you would like to learn more about the company and this initiative, check out their website or contact them via:

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Case study

Carino Wildlife Cruises:

Giving back to the community

WHS criteria: Developing Research, Education and Awareness Programmes; Promoting Collaboration and Community Engagement.

Topics: Education, Community outreach, Conservation, Giving back to the community.

Images by Carino Wildlife Cruises.

The company

Carino Wildlife Cruises is a small family business, which operates out of Paihia in Te Pewhairangi, (Bay of Islands), Northland, New Zealand and is run by Vanessa, her partner and her dad. They take guests out to experience and be inspired by the wildlife and environment of Te Pewhairangi.

For them, responsible ecotourism is about helping people to experience the natural world and creating spaces for people to make a difference. As a wildlife and sailing business in the Bay of Islands, they are passionate about the environment and helping to protect wildlife for the future. During tours, Carino collects data on wildlife that is shared with the Department of Conservation and research agencies.
Giving back to the community

When COVID-19 hit New Zealand in March 2020, it had a huge impact on the tourism industry – including Carino, since 85% of their business relied on international tourism. With borders closed, and no idea when they would be open again, they took the time to reflect on their company and where they wanted to go. They used the pandemic as an opportunity to be positive, rethink their position and start thinking more of others around them.

Carino’s owners wondered how they could make a real difference in their own community while maintaining their priorities for the environment. They were conscious that much wildlife is on the brink of extinction in Aotearoa, and worldwide, and also that COVID-19 had created high stress and anxiety in the community.

As they knew that they wouldn’t be booked for cruises with guests every day, Carino realised that they had a great opportunity to use their yacht to give back to the community.

They saw a way to promote mental wellbeing in the tamariki (children) and whanau (family), and also to engage them with the issues and challenges faced by their local wildlife.

They decided that an education program, helping local children to become kaitiaki (guardians) for the Bay of Islands, would fit well with their ideals. They began the program with a one-day Marine Explorer activity on-board their vessel CARINO NZ.

The Carino Marine Explorer activity aimed to inspire children and spark an interest in marine wildlife by encouraging outdoor and hands-on learning, through science and conservation.

The one-day, Bay of Islands Marine Explorer activity was designed to:

- Help children consider the marine environment around them and appreciate how it’s all related.
- Expand the children’s interest in natural science by using their excitement about dolphins and wildlife.
- Inspire them to consider a career connected to the ocean, on boats, or in marine or wildlife conservation.
On board the floating classroom, children were given a glimpse into the life of local wildlife and learned what it means to be a professional skipper, sailor or marine scientist.

During the day, the children learned about:

- Species habitats and what makes a healthy habitat.
- Species identification.
- How to fill in sighting sheets.
- Use of binoculars.
- Teamwork to pull the sail up, and a chance to drive the yacht.
- Use of a chart plotter and GPS.
- Reef and beach clean-up.
- Dolphin fin identification and its importance.
- Discussions on what we can do to help endangered species in the Bay of Islands Marine Mammal sanctuary.
- Current marine mammal laws and rules about boats around marine wildlife.

After the first educational cruise, Carino created a charitable trust called Carino Marine Explorers Trust and have started other education programs, including:

- Data collection about the local penguin population, with school students.
- Micro-plastic trawling and water composition in the Bay of Islands, with school groups.
- Seagrass and sea urchin distribution studies.

Challenges

Carino acknowledges that it can be easier to talk about initiatives like this than to act on them, as the logistics of getting started and arranging everything that’s needed can be a barrier. However, their advice to other companies is to “be the change” and not let this initial challenge hold them back.

Lessons to pass on

Carino recommends having fun while delivering the educational activities by telling lots of stories, being passionate and authentic, and enjoying the children’s interesting questions.

It’s also important to ensure that all health and safety systems work with the education program and the children.

In terms of community engagement, Carino advises organisers to get out there and create local connections, using every opportunity to network. In their experience, they found that everyone they spoke to expressed excitement about the program.
The first Carino Marine Explorer cruise took place on the 14th December 2020, with eight children who had never been on a yacht before and never been out into the Bay of Islands. Everyone was nervous – the children because it was all unknown to them, and the crew because they were wondering if the cruise would work. Would the children like the experience and get involved in the activities?

After a busy day of driving the yacht, pulling up the sails, recording sightings of penguins, gannets, stingrays, snorkeling, jumping off the back of the boat, learning how to use binoculars and how to identify the dorsal fins of dolphins, the kids were tired, salty and had huge smiles.

The crew considered it a complete success when they heard that one of the girls said that she wants to drive a boat when she grows up. Another mother was enormously proud of her daughter who had jumped off the boat into the water, even though she was actually afraid of the sea. Not only did the cruise help to widen the children’s environment, but also helped them to face fears and push boundaries.

A whole classroom had the opportunity to experience the marine mammals of the Bay of Islands and be there for the introduction of the proposed sanctuary, including meeting the minister of conservation, and were able to submit their views on the future of the dolphins in the Bay of Islands.

The children could see conservation action taking place and understand how they are able to make a difference through the governmental processes. Afterwards, the class delivered a presentation to the rest of their school about the process and the marine mammal sanctuary.
Ideas for the future

Carino is keen to continue the program and has found several companies and individuals who are willing to sponsor more Marine Explorer cruises. Carino intends to develop an ongoing relationship with local community groups and hopes to run cruises at least once a month. They have created a Carino Marine Explorer Club, which they will use to send email updates to new explorers.

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Case study

Futurismo:
Including and supporting the people, culture and the natural heritage of the Azores

WHS criteria: Developing Research, Education and Awareness Programmes; Promoting Collaboration and Community Engagement; Working Towards Sustainability.

Topics: Education, Community outreach, Conservation, Giving back to the community, Equal opportunities, Promoting local culture and heritage.

Images by Futurismo.

The company

Futurismo is a purpose-driven, family-owned business that started 32 years ago as the first whale watching company on Sao Miguel island in the Azores. Now, they offer many different tours setting out from different islands, including whale watching from Sao Miguel and Pico. The company aspires to create a better and greener future through science and advocacy.
Promoting Azorean culture and heritage

Since the company was first established, Futurismo has valued and upheld the people, nature, heritage and culture of the Azores. One of their continued commitments is to engage and give back to the Azorean community.

In addition to bringing the vigias (look-outs) back into action, Futurismo has encouraged local artisans to pursue their passions, supported and promoted their work, and collaborated with and supported local businesses.

The company also supports local NGOs and develops educational activities to engage the local community in environmental education and conservation.

List of activities

**Schools:** Futurismo has developed partnerships with some local schools, which often invite their marine biologists to join events or lectures. Their activities fit within the school curriculum and promote hands-on practical education, critical thinking and pro-environmental behaviour. Futurismo also invites local schools to participate in their whale watching tours and other activities.

**Research:** Futurismo collects cetacean occurrence data during their daily whale watching trips. This data has been used for several academic dissertations, conducted by national and international students who initially joined the company for their Bachelor’s or Master’s internships.

**Guardians of the Azores:** This new project aims to engage families in citizen science. Local families are encouraged to collect litter while enjoying the nature of the island. They record some simple information about the waste collected, then deliver it to Futurismo to be disposed of correctly and exchange this litter for discounts on activities.

**Local businesses:** Futurismo supports local businesses in several ways, such as promoting local artisans’ work and selling it in their shop, or by partnering with local hotels and restaurants to complement their tours.

**Support local sports teams:** Futurismo has sponsored different local sports teams such as the Açores Futurismo Sailing Team, who participated in the Sailing World Cup in 2019, and the BTT bike team, who competed in races in the Azores also in 2019.
Challenges

Futurismo has found that promoting local over global can be difficult at times, either because there are no local options or because local options are more expensive. It has been a challenge for Futurismo to find local initiatives and help them to succeed; for example, by providing local and sustainable food during land tours; selling handmade art, crafts or souvenirs made in the Azores; finding local suppliers of on-board materials, etc.

Engaging the public in environmental education activities has also been a challenge for Futurismo but, by partnering with local institutions and government, and promoting their activities via social media, the company has been able to overcome this challenge step by step.

Lessons to pass on

Futurismo encourages other tour operators to “bet on local” – local knowledge, local people, and local nature. They recommend embracing the uniqueness of a location and its history and culture, learning from it, and sharing its importance loud and clear for everyone to know, enjoy, care about, and protect.

Futurismo believes that responsible whale watching has significant potential and means far more than simply going out to sea and sighting the animals. It’s important to carefully design whale watching experiences to make an impact; to be memorable, meaningful and transformational.
Impact and achievements

Since the beginning of the whale watching industry in the Azores, knowledge of cetaceans in the archipelago has increased considerably. In the early 1990s, only a few people were aware of the presence of cetaceans in Azorean waters. Today, even the most disinterested person on the islands knows that they are a hotspot for whales and dolphins.

The number of schools that contact Futurismo to develop specific programs, lessons, events, games and activities has also increased in recent years.

Furthermore, whales appear now everywhere in the Azores, from the walls of people’s homes to exhibitions, paintings, shopping mall decorations, books, t-shirts, arts, crafts and souvenirs. The collective memory of the Azoreans has been enhanced with whale watching and Futurismo is extremely proud to be part of this achievement.

Futurismo's efforts have supported the different sectors of Azorean society in multiple ways, helping local economy and people, and raising awareness of the importance of the archipelago’s nature and wildlife. Nowadays, around 60 full-time employees of different nationalities work together year-round, aiming to be a driving force for impactful and responsible tourism in the Azores.

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Case study

Five Star Whale Watching:

How treating all cetacean species equally can save fuel

WHS criteria: Working Towards Sustainability; Encouraging Respectful Human-Cetacean Coexistence.

Topics: Environmental and economic sustainability, Conservation, Protection, Education, Business improvement.

Images by Five Star Whale Watching.

The company

Five Star Whale Watching operates from Victoria, Canada. They believe in being a well-rounded and educated company, contributing to sustainability, community engagement and education. For them, every customer is a vessel for positive change. That’s why they believe that leaving each guest with an interconnected perspective into matters of the marine environment is one of the most powerful things they can do.

Treating species equally can save fuel

Five Star understands that they cannot only “talk the talk” when it comes to conservation and sustainability, but must also “walk the walk” to set an example to their guests and community. They have adopted both small- and large-scale efforts to reduce their resource usage and waste.
Five Star sells refillable water bottles in the office and encourages guests to use these or their own bottles for drinking water from the office water cooler. They recycle materials, reuse many items that do not need to be discarded, and choose eco-friendly cleaning products where possible (while still maintaining safety) for use in the office and boats.

On a larger scale, Five Star has integrated environmental sustainability into the day-to-day process and operations of their vessels. Five Star’s captains choose the most efficient trip route, while still allowing for the greatest possible diversity of wildlife, to help minimise fuel emissions.

Unlike some tour operators, Five Star doesn’t select viewing sites based on cetacean species, family or individual (other than avoiding sites or wildlife that are not permitted for viewing). They consider all legally viewable whale species to be of equal importance and value, and do not selectively choose species. This limits fuel that may otherwise be spent on a “preferred” species, and also promotes the message that every member of the wildlife community is integral and interesting.

Captains also try to manage speed and passenger capacities in a way that promotes efficient and smart use of fuel. Vessels are maintained regularly and cleaned to prevent drag and excessive fuel consumption. Two of Five Star’s vessels were even purpose-built for responsible whale watching, including the use of a “whale-friendly” propulsion system (Arneson DriveSystem).

Challenges

Five Star was the first company in Victoria to shift their focus from orcas to a variety of whale species, particularly humpbacks, as their sighting frequency has increased significantly. Since making the decision to encompass all marine species rather than promoting only orcas, they have encountered very few challenges or passenger complaints. In Five Star’s experience, most guests are thrilled to see any kind of marine life. Five Star still has the same sightings percentage as their competitors, but uses only a fraction of the fuel and time to encounter wildlife.
Lessons to pass on

Five Star has found that, by explaining to guests about the variety of wonderful marine life they could potentially see, it takes the focus off one particular species and builds excitement for any wildlife that they may encounter on a tour. They believe that all marine life is amazing and what matters is the way in which tour operators present different species of wildlife and educate their guests.

Impact and achievements

Five Star has reduced their average trip mileage from 50-65nm’s in 2012 to 25-40nm’s in recent years. This fuel-efficiency has the impact of minimising pollution as well as wear and tear on their vessels and equipment.

The lower mileage has also reduced the time spent looking for whales and increased the time spent viewing wildlife, which has led to a more positive experience for guests.

Five Star believes that this strategy is good for the environment, marine life, guests, and the operating costs of the business. In their opinion, it is the smart way to operate a whale watching adventure.

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Case study

Whale Wise Eco Tours:
A journey towards completely eco-friendly operations

WHS criteria: Working Towards Sustainability; Encouraging Respectful Human-Cetacean Coexistence.

Topics: Environmental and economic sustainability, Conservation, Protection, Business improvement.

Images by Whale Wise Eco Tours.

The company

Whale Wise Eco Tours (WWET) is committed to the conservation of cetaceans and aims to inspire advocacy for whales, dolphins and the ocean. They operate tours with a maximum of 10 passengers from Marina Los Gigantes in Tenerife. During their tours, they are also active in collecting data for various areas of cetacean research.

Taking steps to reach the highest level of sustainability possible

Since WWET is extremely dedicated to conservation and environmental protection, they are conscious of the impact of their activities and are continually looking for ways in which they can reduce any negative effects for both the environment and cetaceans.
Building an eco-friendly boat

WWET has created an eco-friendly boat that is sustainable and minimises any disturbance to cetaceans from their whale watching activity.

They have achieved this by:

- Installing two electric engines that reduce noise pollution.
- Integrating a hydrophone into the boat hull to avoid the need for dropping a device into the water, which could cause stress to the animals.
- Integrating cameras into the hull, so there is no need to put a Go-Pro or similar device into the water that could cause stress.
- Treating the hull of the boat with an eco-friendly, silicone-based, antifouling paint that is free of biocides.

Further steps to sustainability

As well as investing considerable effort into making their boat more sustainable, WWET also:

- Run a carbon neutral program with Carbon Fund to counteract CO2 from the endothermic engines of their boat and car.
- Collect plastic and other waste floating as debris in the ocean.
- Ensure that all of their snacks are vegan, locally produced (wherever possible), and organic to reduce the impact of pesticides on the planet.
- Recycle all packaging and give away organic waste for compost.
- Use glasses and other household items that are reusable and biodegradable.
- Succeeded in eliminating the use of paper for their publicity and booking process.
Challenges

Mercedes, the founder and owner of WWET, knew that she wanted a boat that would have the smallest possible impact on cetaceans. After spending months conducting research and trying to find the right boat, even abroad, Mercedes finally decided to create her own.

This was a difficult and overwhelming process and, since Mercedes didn't have the necessary technical knowledge herself, she decided to ask experts for help. Although the experts loved the project and provided invaluable support, the challenge was that each person was an expert in their own field and didn't know how to combine everything that was needed. On many occasions, Mercedes found that she had to act alone to make decisions and assemble and fit equipment in the boat.

Some days were very frustrating and things that could have been done in a day ended up taking weeks due to a lack of experience. Nonetheless, Mercedes’s motivation was always high and she never gave up. Her advice to anyone taking on a similarly innovative project is to be brave and try to learn from trial and error.

Another challenge that Mercedes and her team encountered was sourcing eco-friendly products for their business, not only because options are limited, but also because some products are not as environmentally friendly as they claim to be. For example, after actively researching products, WWET discovered that a brand of bamboo cups sold as eco-friendly actually contained a mix of materials, one of which was plastic.
Lessons to pass on

Mercedes always encourages other whale watching businesses to take steps towards sustainability and is happy for any interested operators to contact her so that they can learn from her experience.

Mercedes would recommend every operator to adapt their boat and has found that it’s worthwhile for many reasons: first, the reward of knowing that it’s not disturbing the animals, and also the positive effect on business growth. She has been surprised by the huge demand for responsible whale watching operators from tourists who greatly value respectful practices and environmental measures.

When it comes to the use of eco-friendly products, Mercedes emphasises the importance of research and warns against simply believing a company’s marketing claims.

Impact and achievements

The local university has recently published a scientific paper assessing the impact of WWET’s new boat on pilot whales’ resting and nursing periods. The study showed that electric engines did not cause any significant difference in the whales’ behaviour, in contrast to the normal engines that significantly reduced the whales’ resting and nursing time, providing scientific evidence in support of WWET’s boat to be used a model for responsible whale watching vessels.
Future goals

Mercedes has a big 'boat bucket list' of features that she would like to improve or add. One of WWET’s main goals is to have better autonomy on the electrics. Currently, they are limited by the weight of the batteries, but they intend to transition to lighter graphene batteries once these are available on the market and have become affordable.

Contact information

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Case study

A Whale’s Song Expeditions:

Turning a unique event in low season into a successful business opportunity

WHS criteria: Working Towards Sustainability.

Topics: Social and economic sustainability, Business improvement.

Images by A Whale’s Song Expeditions.

The company

A Whale’s Song Expeditions was founded by Neil McDermott in 2017, when he decided to make a radical career change and start doing what is he actually passionate about. Today, his company offers small group expeditions for up to six people from Sitka, Alaska, where it is possible to hear the whales sing. The company is partnered with NOAA and Whale Sense and donates 5% of their income to non-profit organisations.
From low season to bubble-net season

Spring is the low season in Alaska, with few tourists and cruise ships visiting, which means very little income for whale watching companies. However, spring is also the time when humpback whales around Sitka display their unique and world-famous behaviour of group bubble-net feeding. Some very famous documentaries showing bubble-net feeding were filmed in this area.

Neil decided to start offering tours where passengers could photograph this unique phenomenon. Initially, Neil hired a photographer to come on board and did all of the marketing, booking and contracting himself. Later, he contracted a large, well-advertised photo tour company in England, which resulted in the tours selling out within days.

Neil’s original idea to fill a gap and support his business during low season has proved to be a success, not only for his business but also to showcase the beauty and uniqueness found in the local waters.

Challenges

Neil encountered several challenges before his tours became a success. First of all, bubble-net feeding in the area was not widely known.

As a new and small company, it was difficult to market the photography tours, and also to find a local photographer who could commit to the time frame and was willing to negotiate the cost of their services.

Initially, Neil marketed his tours through a nature photography organisation, social media, and spoke about it during other tours. Success was sporadic, until he tried reaching out to large, well-advertised and highly regarded wildlife photography tour companies, to see if they would like to add a bubble-net feeding humpback whale photography tour to their portfolio.
Lessons to pass on

Neil would advise other operators to find and share a unique behaviour, event or species in the local area that occurs during the shoulder season or off season.

Impact and achievements

In the end, Neil contracted with a photo tour company in England and they sold out the tours for 2023 within 10 days. During the bubble-net season (March 21st through April 10th), they are now fully booked for 2022, and also sold out for 2023 and 2024 with other top-quality photography companies.

Several companies have included additional dates and styles of tour. For example, the photo company from England has added two 12-day tours for 2023 and 2024, accounting for a 150% increase in Neil’s revenue for 2023. These sales will also have a significant impact to other local businesses due to the increase in lodging, meals and transportation.

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