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Appendix 1

AGENDA

1. Convenor's opening remarks and terms of reference
 2. Election of Chair and appointment of rapporteurs
 3. Adoption of agenda
 4. Review of available documents
 5. Report of intersessional Working Group
 6. Biological impacts of whalewatching on whales
 7. Review of published whalewatching guidelines and regulations
 8. Development of the scientific foundation of whalewatching guidelines
 9. Other topics
 - 9.1 Review of risk to cetaceans of high-speed whalewatching boats
 - 9.2 Review of potential impacts of 'swim-with' programmes on population of cetaceans
 - 9.3 Other
 10. Work plan
 11. Adoption of the report
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Appendix 2

GLOSSARY OF WHALEWATCHING TERMS

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Whalewatching

Whalewatching involves the viewing of cetaceans in the wild, i.e. free-ranging animals (IWC, 1997, p.251). Whalewatching therefore does not include tourism activities where animals whose movements are deliberately restricted by humans and/or captive, either in sea pens, lagoons, pools or other form of enclosure. The term 'whale'-watching as currently used by the IWC whalewatching sub-committee equally refers to all cetacean species¹.

There are different types and varieties of whalewatching operations with differing characteristics that affect monitoring and regulation of their activities. To aid with the classification of these activities for the work of the whalewatching sub-committee (in particular the production of the international directory classifying and documenting whalewatching researchers) and for the benefit of scientists, managers and regulators, we have produced a glossary of whalewatching activities.

Although whalewatching activities, particularly those activities discussed by the whalewatching sub-committee, are typically boat-based, activities can also be land-based or aerial or involve swim-with-cetacean tourism (discussed below). Whalewatching also can be categorised as:

(1) Commercial whalewatching

Whalewatching activities that involve paying customers, organisations or groups, which use viewing whales and dolphins as a means of obtaining funds. Commercial whalewatching can also be broken down further into directed or incidental whalewatching:

- (i) directed whalewatching: a commercial tourism operation where operators specifically seek out areas of high cetacean abundance or known cetacean habitat;
- (ii) incidental whalewatching: a commercial tourism operation whose primary focus may not be cetaceans (e.g. birdwatching, sealwatching or scenic tours), which does not specifically target known cetacean habitat, but the operation encounters cetaceans occasionally to frequently and mentions cetaceans in marketing materials at least briefly.

(2) Recreational whalewatching

Members of the public that encounter cetaceans and view them from personal recreational craft – i.e. activities that are not commercial companies or organisations. Such encounters can be opportunistic (i.e. chance encounters) or targeted (members of the public are actively seeing cetaceans). Regulation of recreational whalewatching may be more difficult than regulating commercial

¹ i.e. Not just mysticete cetaceans, nor cetaceans with a 'whale' moniker such as killer and pilot whales.

whalewatching because recreational whalewatchers are essentially private individuals, who may be less aware of issues regarding the impacts, who may be conducting activities ‘on the spur of the moment’, and whose activities are largely unknown to authorities and management bodies. Moreover, in some areas although there are regulatory mechanisms in place to control commercial whalewatching (e.g. permitting), there is no such mechanism to control recreational whalewatching.

Other characteristics of whalewatching activities

Duration of trips

Whalewatching operations can also be classified by the duration of excursions, for example:

- (1) whalewatching trips: whalewatching excursions that are no more than a day long, typically based from a single home port. Many operations typically make multiple whalewatching trips during a day;
- (2) whalewatching tours: multi-day whalewatching excursions that typically have passengers living on board a vessel. Multiple ports or even countries may be visited during the tour.

Power source

The type of propulsion that whalewatching vessels have also has implications for regulations and their impacts, particularly with respect to the noise produced by vessels or the risk of injury from propellers. Therefore whalewatching vessels can broadly be classified as:

- (1) unpowered whalewatching craft (e.g. sailing boats, kayaks and balloons);
- (2) powered whalewatching craft (e.g. outboard and inboard motor boats, cruise liners and motorised aircraft).

Intrusion

In addition there are two categories of whalewatching that could be considered intrusive. These may require special attention due to their potential impact on both cetaceans and humans:

- (1) physically intrusive operations involve the tourists or tour operators/crew physically touching the cetaceans in any way except for accidental or incidental contact; and
- (2) ecologically intrusive operations include activities that alter the natural history and behavioural ecology of cetaceans, such as introducing food to cetaceans.

Swim-with-cetacean tourism

This sub-category of whalewatching only encompasses activities that involve free-ranging animals ‘in the wild’ and not activities where the target cetaceans are either in a pool, pen or enclosure, or prevented from entering the open ocean by some form of barrier or physical and/or behavioural restraint. It also encompasses all cetaceans, whether mysticetes or odontocetes.

Swim-with-cetacean activities could in turn be termed passive (the in-water interactions rely on the cetaceans approaching the human tourists on their own accord) or active (some pursuit of cetaceans is involved or humans are actively placed in the water in the path of oncoming cetaceans).

Whale research tours/trips

Scientific surveys or research expeditions focussed on cetaceans, advertised as such, that are funded partially or wholly by financial payments by members of the public

partaking in the survey/expedition. The activity is defined as a tour, or a trip, depending on its duration (as noted above)². Ideally whale research tours/trips should entail:

- (1) scientists are involved in providing advice on the design and analysis of the survey/expedition;
- (2) the data collected on the survey/expedition are analysed and published (ideally as peer-reviewed journal articles or reports);
- (3) the results of the survey/expedition are disseminated to the paying participants and appropriate authorities and stakeholders;
- (4) the paying participants actively assist with in the collection of data and/or logistical aspects of the survey/expedition;
- (5) appropriate and detailed training is given to the paying participants.

Whalewatching-aided research

It should be noted that ‘whale research tours/trips’ are different from whalewatching activities that assist with, or partake in, research. For example whalewatching operations that allow scientists to use the vessel as a ‘platform of opportunity’, tour operators that collect sightings, environmental or other data as part of their routine operations, or operations that otherwise assist in scientific research. Such scientific assistance should be eagerly encouraged of all whalewatching operations, particularly if such research is conducted with input and assistance from scientists, the data collected is quality controlled, and results and/or raw data are provided to scientists and managers for their utilisation.

Whale ecotourism

Although some whalewatching operations may qualify as whale ecotourism, this category of activities can encompass non-whalewatching whale-related tourism businesses such as visitor centres or museums dealing with cetaceans; as such, whale ecotourism is not a sub-category of whalewatching *per se*. Also, although the term ‘whale’ is used, this tourism activity encompasses all cetacean species.

Many whalewatching operations are incorrectly referred to as ecotourism activities. Although whalewatching can be referred to as marine wildlife-watching or nature-based tourism, the term ecotourism is generally accepted to refer to activities that have purposefully aimed to reduce their environmental impact and have some conservation component. Therefore whale ecotourism could be defined as a commercial operation that has taken major steps to:

- (a) actively assist with the conservation of their resource (cetaceans), such as co-operating with research groups and other scientists and with research projects or allowing vessels to be used by scientists/research groups as platforms of opportunity;
- (b) provide appropriate, accurate and detailed interpretative/educational materials or activities for their clientele about the cetaceans viewed and their associated habitat;

² There is a difference between *bona fide* whale research tours/trips and activities that advertise themselves as if they are conducting ‘whale research tours/trips’ but the operators are not conducting a dedicated surveys/research programme, and the activities have few, or none, of the characteristics listed in the above text. Such ‘pseudo’ whale research tours/trips may warrant special attention, particularly in regions where vessels conducting scientific research are granted increased and/or preferential access to cetaceans and their habitat.

- (c) minimize their environmental impact (such as reducing emissions or disposing of refuse appropriately);
- (d) adhere to whalewatching regulations or an appropriate set of guidelines, if no specific regulations are available for the area;
- (e) provide some benefits to the local host community within which the company operates. Such benefits could include a policy of preferential employment of local people, selling local handicrafts, or supporting (either financially or in kind), local community-based conservation, education, cultural or social projects or activities, (for example financially or as in kind support for a voluntary marine rescue service or providing non-profit trips for local schools).

This glossary is provided to assist and clarify the work of the IWC whalewatching sub-committee and other researchers investigating whalewatching activities and whalewatching managers. These terms are working definitions and should not be considered as absolute categorisations of activity.

REFERENCE

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