

---

## 7. TOURISM, PAST, PRESENT AND FUTURE

---

A report such as this, largely based on presentation of statistics, gives a snapshot of the situation at present (at the time of latest available statistics). Also the report draws together historical precedents. While the time series statistics describe past and present tourism, they are not explanatory. To enable reasonably confident predictions for the future to be made it would be necessary to model the determinants of demand for tourism and supply of tourism services. This complex task has not yet been undertaken for the Reef Region, so predictions for future tourism activity levels are largely based on extrapolation of past performance.

In order to provide some conclusions for this report, a summary of statistics on Reef Region tourism to date is presented and then some issues which will be important for future tourism in the region are briefly introduced.

The background to Reef Region tourism is world wide tourism. Internationally, travel (measured by arrivals) increased by 23 percent from 1977 to 1984 (ATC 1986(b)). World tourism is expected to increase steadily at a rate of 2.5 percent per annum to 1995 (ATC 1986(b)).

Tourism has become an important, and in some cases the largest, foreign exchange earner for many countries (Mathieson and Wall, 1982). For Australia, inbound tourism is the country's eighth most important foreign exchange earner. (ATC 1986(b)).

Despite this, a "tourism deficit" is experienced in Australia as more people travel overseas and spend more money overseas than the country gains from inbound tourism, though this gap seems to be closing (DSRT, 1985).

In recognition of the current and potential contribution of international tourism to Australia as an "export" good, the Commonwealth and State governments are promoting travel to Australia and encouraging Australians to holiday at home.

International tourism to Australia has increased in terms of the number of visitors at an average rate of 6.4 percent per annum over the five years to 1985. This is ahead of the average growth rate for the world. The increase in international arrivals in 1986 was a high 25 percent. Australia's increased popularity as a destination has been attributed to "the devaluation of the Australian dollar, improvements in the standard of infrastructure and associated services and the perception of our country as a politically stable and safe place to visit." (National Australia Bank 1986).

Domestic tourism is also growing at a steady rate of 3.6 percent per annum (for the five years from 1979/80). For Australia, domestic tourism is by far the greatest source of tourist activity. Over 54 million domestic trips are made annually compared with 1.5 million visits from overseas.

Queensland attracts around one third of international visitors and one third of Australian domestic trips. Over the five years to 1985, the rate of increase of overseas visits to Queensland was 51 percent, double that for Australia (26 percent). Domestic travel with Queensland as a destination increased by 21.5 percent over the five years to 1984/85. This was twice the rate of increase of domestic travel in Australia as a whole (10.5 percent).

The Great Barrier Reef and adjacent mainland is the destination of 182,700 overseas visitors, 16 percent of visitors to Australia. Around 2.3 million domestic trips or 4 percent of the Australian total have their destination on the Reef Region and adjacent mainland.

It is not only the 151,000 people who stay on island resorts (for 790,000 visitor nights in 1984/85) who make up reef region tourists. The commercial boat (and to a much lesser extent air service) sector provides an important means of access to the reef. The majority of trips taken are day trips. Those boats provide the link between people staying in mainland accommodation and the reef. This commercial passenger boat sector has virtually doubled in terms of boat numbers in the last 5 years to provide 1.2 million visitor days per annum. This industry provides the greatest number of visitor days to the Reef Region. It is a somewhat diverse industry composed of a number of vessel types offering a number of different trips and activities.

To include private boat access to the reef as "tourism" may be stretching the concept a bit far, though these visitors fall within the adopted definition of "tourists". Private boats are largely used by residents of the adjacent mainland, who spend around 690,000 visitor days in the Reef Region each year.

The economic value of tourism to the Reef Region measured as gross output is around \$200 million. This value is increasing in real terms by 10% per annum.

It is interesting to explore how many visitors to the Reef Region actually visit coral reef formations. The Reef Region as defined is composed of islands, reefs and water. Only three island resorts are located on coral cays, the remainder being on continental islands. The continental islands all have some reef structures fringing them but the degree of reef development varies from island to island.

It has been estimated that 75 percent of visitor days spent by island resort tourists and commercial boat passengers are actually spent in the vicinity of islands and fringing reefs rather than on the mid shelf and outer shelf platform reefs. (Driml, 1987 b).

An estimation of visitor days where people may experience reefs other than fringing reefs includes; tourism to Green Island and reef (the single most heavily visited reef) large catamaran trips to reef locations, other day trips to reefs and extended fishing and diving trips. The estimate is 300,000 to 400,000 visitor days per year.

Private boat access to reefs is not included in this estimate. The majority of private boat activity is within 5 km of the coast, except in the Cairns area. Private boat and recreational fishing activity focuses on features including the mainland coast, islands, fringing reefs, submerged reefs and shoals, and platform reefs.

The above estimation attempts to put coral islands and reefs usage in perspective and emphasises the importance of fringing reefs in providing important reef recreational resources. As has been emphasised elsewhere in this report, the Great Barrier Reef is only one, albeit important, of a number of factors that attract people to holiday in this area of the world.

This summary brings us conveniently to some issues concerning the future of Reef Region tourism. The background and trends of tourism generally in the world, Australia, Queensland and the Reef Region have already been discussed in this report.

Trying to predict the future for Reef Region tourism is somewhat akin to crystal ball gazing. Tourism, being a discretionary or luxury activity is sensitive to fluctuations in domestic and international economic conditions. Important determinants of the level of tourist activity are disposable income, exchange rates and prices - the combinations of which may encourage or dissuade tourism.

Two issues worth expanding upon here, because they will affect both the demand and supply side of tourism in the Reef Region and therefore the face of tourism in years to come, are technological change and environmental quality.

### Technological Change

Technological change is important for Reef Region tourism. The reef is an exceptional recreational resource, however the marine environment presents difficult access. The most spectacular coral reef formations are some distance from the mainland, and they are mostly underwater. Not everyone is happy or comfortable in a boat. Wet or windy weather is a deterrent and a proportion of the population are excluded by virtue of ability or preference from snorkelling or SCUBA diving.

The introduction of large fast catamarans over the past five years has increased reef access significantly. The development of semi-submersible vessels has improved coral viewing for those who do not wish to venture under water. The popularity of these trips indicate that they are catering for a demand to see the reef in comfort and safety.

These developments indicate the potential effects of technological change. Of course other changes including the improvements in motor boat technology and the development of SCUBA diving (along with relative price changes) have had impacts on the recent history of reef use.

The latest technological innovation is the floating hotel with the first one due to be installed in mid 1987. Whether this will change the face of reef tourism will depend on user acceptance of the concept.

While other innovations in marine access are on the drawing board, a reverse concept is being introduced with the Great Barrier Reef Aquarium in Townsville, bringing the marine environment onto land. The complex, which will include the worlds largest living coral reef in an aquarium and an interpretive area, will cater for people who cannot visit the reef and for those who wish to learn more.

### Environmental Quality

The retention of environmental quality in the Reef Region will be important to some tourists and not so important to others. Those who want luxury accommodation and sunshine may not care about other environmental amenity. Other visitors who are in whole or part attracted by the particular environmental characteristics of the region will demand a quality experience. As visitors become more educated about the reef through the media and interperative efforts of government and the tourist industry, they will demand to see what they have been promised.

The industry and those controlling it will need to pay particular attention to design and operation in the reef environment. The principle that ultimately it is in the interests of the tourist industry to protect the resource on which it depends has been emphasised by the Great Barrier Reef Marine Park Authority (Kelleher, 1986). Careful and co-operative management is required to allow development of tourism within the limits placed by the environment and competing uses for the Great Barrier Reef Marine Park.