

PREFACE - Precis of main findings prepared by Great Barrier Reef Marine Park Authority

EXECUTIVE SUMMARY AND RECOMMENDATIONS

1. Visitor Traffic

- It is estimated that Reef related tourism has increased by a factor of 40 over the period 1946-1980, in some cases exceeding the Queensland and Australian averages.

- Great Barrier Reef Region currently attracts approximately 2 million total visitor trips.

- Interstate visitors (1979/80) accounted for 25% of domestic visitors to island resorts.

- Not all visitor traffic is holiday oriented, and business trip categories add to tourism impacts, e.g. cruises.

- Reef related tourism attracts a consistent percentage of total overseas visitor traffic during intermittent periods 1971 - March 1980, the trend paralleling the expanding volume of overseas visitors into Australia. North American tourists are decreasing and New Zealand tourists are increasing.

- Tourist numbers are expected to increase owing to easier access into North Queensland.

- Previous survey figures not entirely satisfactory, e.g. Gibbings relies on a limited sample, the Australian Tourist Commission used a broad brush approach in assessing Great Barrier Reef visitors, others use a "gut feeling".

2. Seasonality

- Peak domestic visitor periods are the southern winter months May to September, January (school and industry holidays coincided throughout Australia until 1980). Future holiday periods are staggered and this may influence seasonality.

- Peak international visitation periods are November to March, but volume is low compared to domestic travel - overseas visitors constitute about $2\frac{1}{2}$ % of the total visitor traffic.

- Some tourist operations have demonstrated that aggressive marketing can level these troughs.

3. Length of Stay

- 85% of trips have a one to seven night duration.

- Visits to Cairns and Island resorts have a greater proportion of 7 to 14 night duration than other centres.

4. Employment

- Insufficient data available for precise conclusions but trends do show:

- . employment is subject to fluctuations of season and economy;
- . employment increase has not kept pace with increase of visitor traffic; and
- . ratio of island resort employees to each room of accommodation is about 2:1 that of mainland resorts.

5. Accommodation

- Strong growth in accommodation development, since negative position of 1971 noted by Pannell, Kerr, Forster:
 - . substantial proposed investment in island resort development; and
- In the opinion of the Consultants:
 - . current Federal government investment and depreciation allowances restricted overall growth.

6. Mode of Travel - Transport

- Over 1965/80 air travel has increased, rail has progressively declined in favour of air and motor vehicle.
- No discernible trend regarding increased motor car fuel costs and decreased distance of travel or holiday duration.
- The Consultant believes that embarkation points are often poor, as are road connections.
- The Federal Government upgrading of Townsville and Cairns airports are likely to generate more air traffic to the Region.

7. Recreation/Communication

- Visitor interest in the Reef itself could be improved by inclusion of educational components in current man made attractions and service facilities.

RESEARCH RECOMMENDATIONS:

. ATIA recommends that research is required in the following areas:

- (1) Economic impact of tourism and more specifically:
 - . day visitors and their impact on the Reef and coast:
 - . usage and impact of boat and aircraft charters, pleasure boats;
- (2) Determine present and likely future market segments and
 - . suitability of accommodation for satisfying future market segments;
- (3) Adequacy of transport to promote access to the Reef and means of funding;
- (4) Visitor experience of the Reef: the Authority should provide an extension service to educate the tourist industry and hence develop an environmental consciousness;
- (5) Great Barrier Reef Marine Park Authority research should include an annual update of this data base review.