

2. SUMMARY OF MAIN FINDINGS

The main findings of our study are summarised under the following headings:-

1. Visitor Traffic - General

There has been a tremendous growth in Reef-related tourism over the period 1946-1980. Not only has the rate of growth kept pace with the rest of Queensland and Australia as a whole, but, in some areas, it has exceeded it.

Whilst the information on visitor traffic for the early periods is rather sketchy, nevertheless, we do have some indicators for visitor traffic to the Whitsunday Islands over the whole period, which illustrate the trend. In 1947, visitor traffic to the Islands was referred to in the order of magnitude of 5,000 visitors per year. By 1962, a figure of 28,000 visitors to the Whitsunday Islands is mentioned. By 1969, the first year for which any sort of statistically based figures are available, the figure was 69,000 and by 1979, the Domestic Tourism Monitor gives a figure of 182,000 per year.

The above figures relate to a particular destination area which has experienced a growth rate for visitor traffic somewhat lower than the area as a whole. However, it is worth noting that the Great Barrier Reef Region as a whole, currently attracts total visitor trips approaching 2,000,000 per year.

The interstate component of domestic visitors has been well maintained, particularly in regard to the island resorts which in 1979/80 accounted for 25% of their domestic visitors - a figure significantly higher than the Queensland average.

One of the reasons for this has been the fact that package tours operated by the domestic airlines out of Sydney and Melbourne to Barrier Reef destinations have proved very popular and there is a growing demand for this type of holiday.

Although not all this visitor traffic is made up of holiday visitors, it will be appreciated that all visitors, even those in the business trip category, contribute in much the same way to the impact of tourism in the Reef area, by such things for example, as taking advantage of cruises etc. in the leisure time, although for the purposes of classification, the visit would not be regarded specifically as "holiday".

Whilst these figures relate to domestic tourists, it is necessary to take into account the component of overseas visitors to the Reef area. As will be seen from Appendix I "Great Barrier Reef Region - Visitors from Overseas", Reef related tourism has attracted a fairly consistent percentage of the total overseas visitor traffic to Australia as identified for the periods 1971-72 to 1974-75 and April 1979 to March 1980. These are the only periods for which this information is available.

The figures in themselves are not entirely satisfactory, (for instance, the A.T.C. Surveys of International Visitors have nowhere defined either in their questionnaires or in notes for interviews, exactly what is meant by the destination "Barrier Reef"). It can be assumed, however, that the Barrier Reef Region is intended and not the Barrier Reef as such.

Nevertheless, a trend is evident - the number of overseas visitors to the Region continues to keep pace with the expanding volume of overseas visitor traffic into Australia which has increased by 50% over the past 10 years and the indications are that this trend will continue.

This situation is quite remarkable in view of the difficulties which confront overseas visitors in actually getting to the GBR Region. The Great bulk of international visitors enter Australia through Sydney and Melbourne. Due to the limitations on Brisbane Airport which restrict scheduled services to Qantas, British Airways and Air New Zealand, many overseas visitors face expensive and time-consuming domestic travel if they are to include the GBR Region in their itinerary.

The position will change in the near future however, and overseas visitors will soon be able to gain easier access to the region. The Federal Government has announced its intention of bringing Townsville up to a standard adequate to handle international scheduled flights to be operated by Qantas early in 1981. Similarly Cairns Airport is to be upgraded. Brisbane Airport itself will be brought to full international standards by 1986.

As a consequence of these developments, it may be anticipated that the GBR Region will attract an ever-increasing share of overseas visitor traffic in the future.

It is interesting to note that the composition of international visitor traffic has undergone a change during the limited period the A.T.C. surveys cover. For instance in 1971/72 visitors from North America (U.S.A. and Canada) to the GBR Region constituted nearly 50% of the total overseas visitor element. By 1979/80 this had fallen to 30%. Over the same period the component of New Zealand visitors had risen from 17% to over 30%.

The relative decline in the proportion of North American visitors could well be reversed however, as soon as the Qantas services into Townsville from Honolulu and New Zealand commence in February 1981, as the result of promotions being undertaken by Qantas and the A.T.C. in connection with the introduction of the new service.

2. Seasonality

The study shows that the peak visitor period for the GBR Region are the southern hemisphere winter months of May to September and the month of January (in which month school and industry holidays coincide throughout Australia).

Overseas visitors from the Northern Hemisphere tend to visit Australia in the Northern winter - November to March, but as they constitute only a small proportion of total visitors, the volume is not sufficient to alter the pattern set by the domestic traveller.

Aggressive marketing of package tours to island resorts is attempting to iron out marked fluctuations between peaks and troughs for this particular destination. For instance, one particular island resort has enjoyed a 100% occupancy for the past 9 months as a consequence of its marketing programme.

3. Length of stay

About 85% of the trips to the GBR Region are of a duration of between one and seven nights, although visits to Cairns and the Island Resorts show a greater proportion of visitors stay for 7 nights to 14 nights than for other destinations in the region.

4. Employment

There is not sufficient reliable data to come to any precise conclusions about employment generated by visitor traffic to the GBR Region. However the following trends are evident over recent years:-

- (i) Employment in the industry is subject to seasonal fluctuations as well as fluctuations in the overall economic climate.
- (ii) On the whole, the increase in overall employment does not appear to have kept pace with the increase in visitor traffic. This possibly reflects the tendency by operators to contain operating costs relating to labour, by restricting the recruitment of extra staff to offset the increase in wage rates which occur at regular intervals on account of rises in the cost of living.
- (iii) For island resorts, the ratio of employees to each room of accommodation is approximately twice that on the mainland. This arises from the fact that the services required on island resorts call for a "self-sufficient" labour force to a much greater extent than on the mainland.

5. Accommodation

There has been a strong growth in the provision of accommodation over recent years involving substantial amounts of capital investment in larger-scale developments.

Plans for new accommodation proposed or already in hand, point to the fact that this strong rate of growth will continue.

The present position is in marked contrast to the situation outlined in the 1971 Great Barrier Reef Visitor Plan prepared by Pannell, Kerr, Forster, which alluded to the fact that "the severe stress on capital requirements has led to an uneconomic gearing in the size and standards of resort accommodation... The risks and costs involved have discouraged major developments in the Great Barrier Reef area" (p.133).

This report went on further to observe that, "with the exception of Ansett, no major Australian accommodation provider has developed resort facilities along the Barrier Reef, while, in certain instances, these very same providers have gone outside Australia to construct resort properties" (p.133).

The situation in this regard has also changed. Both P & O and T.A.A. having bought into island resorts and invested considerable sums to up-grade and expand the operations. Substantial investment is taking place in the development of new island resorts which are allied to ample capital resources and operational expertise of the highest standard.

Similarly, substantial investment is either taking place or planned for the near future related to the development of tourism accommodation in coastal areas. Nevertheless, there is seen to be a need for more investment in resort development as distinct from simply tourist accommodation. The view has been expressed that the Federal Government should provide more generous rates of depreciation on tourist accommodation buildings and resort complexes than the $2\frac{1}{2}\%$ per annum which currently applies, in order to develop a product more in keeping with the "holiday experience" which the growing tourist traffic will be seeking in the future.

6. Transport

Transport by air has shown a period of sustained and significant growth over the period 1965/80. Travel by rail on the other hand has progressively declined in favour of the private car and the aeroplane.

It is too early to gauge the effect of the escalating costs of motor fuel on the habits of private motorists in regard to their holiday patterns relating to the Great Barrier Reef Region. As yet there is no discernible trend by private motorists towards reducing the distance of travel or the duration of their holidays which would lead to a significant change in the use of this mode of transport to the region. Whilst it is true that there has been some diminution for Australia as a whole in the use of petrol fuel, this may be explained, as far as the private motorist is concerned, by the switch to more fuel-efficient motor vehicles.

The motor car accounts for over 75% of the visitor trips to the GBR Region. Travel by cars and coaches within the region will increase as the number of visitors by air increase. There is a need for improvement in roads giving access to places of interest and to the main Bruce Highway.

As already mentioned, the Federal Government has recently announced its intention to upgrade Townsville and Cairns Airports. As a result, a considerable increase in air-borne visitor traffic to the Region is likely to be generated in the future, with consequences for internal motor traffic and launch trips.

7. Recreation/Communications

The man-made attractions in the GBR Region have been summarised in Appendix VI. The standard of these attractions varies in quality from excellent to quite poor. As a whole, it is our view that some of the man-made attractions may be lacking in the standards appropriate to the increasing level of sophistication of visitor traffic coming to the GBR Region. More and more Australian tourists have had the opportunity to travel overseas and the standard of attractions must increasingly be looked at from an international standpoint.

Visitors would seem to be showing more interest in gaining access to the Reef itself. This interest could be satisfied to some extent, by the greater availability of interpretative material and by the inclusion of educational components in what the man-made attractions have to offer.

In general, the man-made attractions should be in keeping with the beauty and appeal of the natural environment of the Reef area. The extent and diversity of areas set aside as National Parks in the Region (see Appendix V) is not generally realised. Accommodation lodges of a modest but good standard could be provided in more National Park locations as is the case with National Parks in other parts of the world, and so allow visitors to gain better access to GBR Region locations.

As regards tourist accommodation and attractions, it is evident that there is a continuing need to ensure that the tourism product is developed in such a way as to preserve the particular appeal of the natural beauty of the GBR Region. The Visitor Plan on the Great Barrier Reef prepared by Pannell, Kerr, Forster, & Co. in 1971 was highly critical of the development which had taken place up to that time and suggested that "the continuation of man's unchecked and uncontrolled development will in time leave only the picked over remains of what is now called the Great Barrier Reef". (p.69)

Developments which have taken place since that report was prepared have shown a greater awareness of the need for better standards which enhance and complement the environment. In the long-run, visitor satisfaction and the expansion of visitor traffic, will depend on this improvement of the tourist product being maintained. The Great Barrier Reef Marine Park Authority could well have a role to play in this sensitive and vital area by providing assistance to existing and new operators to create a tourist product which will contribute to the distinctive appeal of the Great Barrier Reef as a destination.

With regard to communications, a large number of launch trips and charter services operate in the GBR Region providing access to various island and reef destinations from the mainland and the islands. These are detailed in Appendix VII.

Launch services are being supplemented by seaplane trips to the Reef. The indications are that trips to the reef by plane will increase in popularity. The extent of the visitor traffic involved in these Launch and plane trips and their impact on the Reef is recommended as a subject of further study - see Chapter 4 of the Report.

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