

3. TOURISM WITHIN THE "REEF REGION"

The approach taken to provide information on tourism in the Reef Region (waters and islands of the Great Barrier Reef, excluding the mainland) has been to build the story from the ground up using specific studies of components of Reef Region tourism. These studies are summarized in this section and are discussed in some detail in the following sections.

Effort to date has been focused on collecting information on the three large avenues of visits to the Reef Region - commercial passenger vessels (charter boats), island resorts and private motor boats.

A number of less well patronized activities/modes of access are not covered in this report. Approximately 80,000 visitor days are spent in island camping each year. Access to islands for camping is via commercial passenger vessel or private boat. Air services to the reef provide in the vicinity of 10,000 visitor days per annum. Reliable estimates are not currently available for the minor components of tourism represented by yachts and private boats from outside Queensland.

What is a meaningful unit by which to describe visitor use of the Reef Region?

Visits to the reef may be made by people who only visit once in a year and by people who make repeat visits within a year. Visits may last one day or longer. Thus the number of "different individual people who visit" is a meaningless statistic (and is virtually impossible to record).

The number of "visits" does not describe the intensity of use of the Reef Region (as the length of visit is an important factor) however this statistic may be compared with data from the DTM, IVS and similar publications.

"Visitor days" seems the most appropriate measure of tourist usage of the Reef Region. The limitation to this concept is that on a particular day a tourist may, for example, travel on a charter boat and stay at an island resort. As the estimates of visitor numbers and days have been collected according to facility - island resorts, charter boats, private boats - a certain amount of double counting occurs.

The measure of use according to facility is particularly useful as this is the most obvious way to collect data over time to monitor tourism usage.

For 1984/85, there were 151 000 visitors who stayed at island resorts. The average length of stay was just over five nights making 790 000 visitor days. (QTTC, 1986).

Commercial passenger vessels carried approximately 1 110 100 passengers in 1984/85. As the overwhelming majority of trips were day trips, the number of visitor days are estimated at 1 274 000.

Although trips in private boats often last for more than one day, the average length of trips is one day (6 hours fishing) (Hundloe, 1985). Thus the number of visits is the same as the number of visitor days. This is estimated at 690 000 for 1984/85.

More detail on the sources and characteristics of the data in Table 15 is presented in the following sections.

Table 15. Reef Region, Visitor days by facility, 1984/85.

| Facility | Visitor days |
|----------------|--------------|
| Island resorts | 790 000 |
| Charter boats | 1 274 000 |
| Private boats | 690 000 |

An important aspect in the gathering of data on Reef Region tourism has been to record economic information. The emphasis has been on measuring expenditure by tourists on their recreational experience. This data are shown in Table 16.

Table 16. Reef Region, expenditure by tourists.

| Facility | Expenditure | |
|----------------|----------------------|----------------------|
| | 1981/82 \$ | 1984/85 \$ |
| Island Resorts | 46 000 000 | 84 000 000 |
| Charter Boats | 26 000 000 | 35 000 000 |
| Private boats | 43 000 000 | 68 000 000 |
| Total | \$115 000 000 | \$187 000 000 |

In economic analysis terms, measuring expenditure only is one-sided as the costs of providing the services are not enumerated and thus the net economic effects (contribution to net national benefit) have not been calculated. However expenditure data is useful in a number of ways. The gross expenditure data may be manipulated to provide some economic indicators using input-output multipliers calculated previously for Reef Region activities (Driml 1987a). Thus the employment created by tourism expenditure may be calculated (Table 17).

Table 17. Reef Region, employment (direct plus indirect).

| Facility | Employment | |
|----------------|--------------|--------------|
| | 1981/82 | 1984/85 |
| Island Resorts | 2 224 | 4 116 |
| Charter boats | 1 004 | 1 330 |
| Private boats | 1 214 | 1 915 |
| Total | 4 442 | 7 361 |

Expenditure on tourism in the Reef Region has been found to be roughly \$200 million per annum. This figure represents strictly that expenditure involved in visiting the offshore islands and reefs. It does not include travel to North Queensland, nor does it include accommodation or other expenses on mainland North Queensland. Obviously much of the tourism expenditure in mainland North Queensland is associated with reef tourism, including where people stay on the mainland and make day trips to the reef. This aspect of Reef Region tourism has not been yet been sufficiently researched to allow the size of this "support" expenditure to be calculated.

The \$200 million expenditure on reef tourism is around 7 percent of total Queensland expenditure of \$2 800 million (as measured by the BIE, inflated to 1984/85 dollars). Reef tourism makes up a small 2 percent of Australian tourism expenditure \$8 600 million (BIE inflated to 1984/85 dollars).

Whilst the Reef Region tourism may seem insignificant in Australian terms, it is not unimportant in Queensland or regionally. Tourism is becoming increasingly important in Queensland. The expenditure by people staying in commercial accommodation establishments in Queensland was \$1 059 million in 1984/85 (QTC, 1986b) while the output of the sugar industry in that year was \$782 million. (ABS, 1986).