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# **Review of the Marine Tourism Industry in the Great Barrier Reef World Heritage Area**

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Prepared by the  
Tourism Review Steering Committee  
with assistance from the  
Great Barrier Reef Marine Park Authority  
and the Office of National Tourism

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# **REVIEW OF THE MARINE TOURISM INDUSTRY IN THE GREAT BARRIER REEF WORLD HERITAGE AREA**

## **Part 1 KEY FINDINGS AND RECOMMENDATIONS**

*Prepared by the Tourism Review Steering Committee  
with assistance from the  
Great Barrier Reef Marine Park Authority  
and the Office of National Tourism*

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**June 1997**

## TOURISM REVIEW - TERMS OF REFERENCE

A strategic approach to the future management of tourism use of the Great Barrier Reef is being developed, within the context of the broad strategic directions for the management of the Great Barrier Reef Marine Park and World Heritage Area, biological conservation, Aboriginal and Torres Strait Islander, and use values. A key part of this process is a review of Marine Park tourism, which will:

1. Review information available on the scope and extent of tourism operations in the Great Barrier Reef Marine Park (GBRMP) and its relationship with the broader economy.
2. Review information available on the environmental, social and economic impacts of tourism use in the GBRMP.
3. Outline current and proposed strategies and mechanisms for managing sustainable tourism use.
4. Recommend strategic tourism use policy and management mechanisms, particularly in relation to resource allocation (*broad scale*), latent capacity, site allocation (*sites for individual operations*) and permit security, which will:
  - a) provide for the ecological sustainable management of tourism
  - b) maintain tourism values and desired settings for use
  - c) maintain tourism industry viability, competitiveness and diversity and provide opportunities for a range of experiences;
  - d) ensure quality standards in presentation of World Heritage values; and
  - e) Ensure tourism use is consistent with the Great Barrier Reef Marine Park Authority's obligations for protecting World Heritage, conservation, Aboriginal and Torres Strait Islander and use values in the GBRMP.
5. Recommend effective consultative mechanisms and processes for the Great Barrier Reef tourism industry which meet the needs of both the industry and government.

The review must be conducted in accordance with the objectives of the *Great Barrier Reef Marine Park Act 1975* and be consistent with the need to ensure protection, conservation and presentation of the Great Barrier Reef World Heritage Area.

The review will draw upon the recommendations arising from the review of GBRMPA conducted by Ron Brown and pay particular attention to work conducted under the Reef Tourism 2005 project. The review will also have regard to activities already being undertaken by GBRMPA in relation to tourism on the GBR, especially in regard to changes to the permit system, and will provide appropriate input into these processes.

To facilitate effective and efficient consultation a steering committee will be formed to oversee the review. Representatives will be drawn from the Marine Park tourism industry, key stakeholder interest groups and Commonwealth and Queensland Government agencies associated with tourism and environment and heritage management.

In developing recommendations on the strategic tourism use management policy and consultative mechanisms, there will be close consultation with the tourism industry, Marine Park stakeholders and Government. A final report is to be provided to the Minister for the Environment and the Minister for Industry, Science and Tourism by 30 June 1997.

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## EXECUTIVE SUMMARY

The Great Barrier Reef Ministerial Council established a Review of the Marine Tourism Industry on the Great Barrier Reef, to have particular regard to the following issues:

- *the latent capacity that exists in the number of tourism permits that have been issued to date and options for managing latency;*
- *security of permits held by industry;*
- *mechanisms for resource allocation in both the long and the short term; and*
- *consultative mechanisms with the industry.*

The development of a new Marine Tourism Use Strategy is already well advanced within the Great Barrier Reef Marine Park Authority, involving a shift from an historic reliance on Zoning Plans and individually-tailored permits for each tourism operator, towards the spatial management of cumulative impacts through Zoning Plans, statutory Plans of Management, and licences which are more generic and thus transferable. The proposed new management regime will also involve a greater reliance on non-regulatory instruments through partnerships with industry.

The Steering Committee has strongly endorsed this approach to managing the impact of marine tourism on the Reef, although some changes have been recommended. Moreover, we have concluded that the new planning and management regime developed for the Cairns and Whitsunday Areas should be used as a template for future implementation in the rest of the Marine Park.

Nevertheless, it must be understood that a shift towards a more strategic and spatial approach to managing impacts will require an up-front investment in quality research and consultation. To fail to make this investment would be to unnecessarily constrain the growth of low-impact tourism.

In our view, the strategic context of these new policy instruments - how they will work and where they will be applied - is understood by only a small number of officials within the Authority. Key decisions are soon to be made about the future regime of management for marine tourism on the Reef and it will be most difficult for these decisions to be well-informed or widely understood, without a document providing a clearly-articulated, long-term vision for the management of marine tourism on the Reef.

*Zoning Plans* are an appropriate instrument for defining the 'big picture' settings for use and access and this must both include a recognition of the significant role of marine tourism and ensure a diversity of tourism experiences across the Marine Park. In areas of more intensive use, *Plans of Management* are a more appropriate instrument for regulating use.

*Statutory Plans of Management* will be the primary instrument for the spatial management of Reef use. The Committee was reassured by Authority staff that the use-settings in the draft *Plans of Management* have been based on a professional assessment of the carrying capacity of and the agreed values for each site and area. These determinations have been based on scientific

evidence, day-to-day experience and community consultation. We have argued that the decision-making processes upon which these determinations have been made should be properly documented.

The Authority needs to be involved in 'big picture' settings of amenity questions through Zoning Plans and Plans of Management, nevertheless, the Committee was concerned that this should take place at a strategic level, rather than through ad hoc interventions in licences and permits. The latest drafts of the Cairns and Whitsunday Area Plans of Management contain aspects of the generic licensing system which the Committee believes would be better located in regulations and/or policy documents.

*Operating Licences* will be used to regulate access to and use of areas within the Marine Park, as well as specific sites. Detailed conditions in existing permits will be relocated to regulations and Plans of Management, leaving licences which are more generic and thus more readily transferrable. Nevertheless, the Committee is concerned that the new permissions, as currently proposed, may not be sufficiently generic to produce an optimal level of choice and flexibility for the industry. In particular, we are concerned that site-specific entitlements be separated from access rights to the Reef.

As much as possible, transitional issues should be kept separate from the design of the new management instruments. This is particularly important if they are to be used as a template for Reef-wide management decisions. The Committee was concerned that the Authority may be inclined to make too many compromises in an attempt to accommodate existing permit holders, many of whom are not active in the industry. We believe that tougher decisions will be required at the outset of the new regime to reduce unused capacity. As a fundamental principle, however, existing user entitlements should be transferred across to the new regime.

Having considered a number of options for allocating new sites, the Committee opted for a continuation of the current regime of first-come, first-served. This will result in the release of new sites being determined by public demand rather than being artificially stimulated by auctions. Such an approach will also give the Authority greater control over environmental concerns.

*Security of Permits:* The length of tenure of permissions is one of the factors influencing security, but there are a number of others which must also be taken into account, including the perception of instability in government policy and the likelihood that a permission will be renewed upon expiry. There is some evidence to suggest that, in spite of the extension of permit tenure in 1993 to 6 years, industry perception of permit security has declined due to policy uncertainties. If the Authority is able to specify more clearly the circumstances in which permissions will be amended, revoked or not renewed, and ensure that it has the legal power necessary to protect ecological values, then the Commission would recommend an extension of the permit period.

*Latency* emerged some years as a measure of the gap between the number of *permitted* visitor-days and the *actual* number of person-visits to the Reef. It has

always been recognised that there was a considerable element of spare operational capacity built into the latency numbers, which was necessary for sound management of tourism operations. On the other hand, there was also a considerable number of 'sleeping' permissions which could be activated through transfer. One manifestation of this latent capacity is the large number of permits which have not been used for extended periods. The Committee believes that in addressing cumulative impacts, the draft Plans of Management will remove much of this latency, although firm decisions on unused permissions at the point of transition into the new scheme will also be necessary.

*Consultation:* Since the establishment of the present Review, a Tourism Advisory Group (TAG) has been established and has now been operational for almost six months. Initial feedback from the Authority and members of the TAG indicates that it has been working well. It is likely that, over time, this forum will lead to more formal industry structures. Nevertheless, at this time, we believe that TAG is the appropriate vehicle for seeking input from the marine tourism industry into Authority decision-making. We have recommended that it be formalised as a permanent, non-statutory, competency-based forum. We have also pointed to the need for closer consultation at the level of place-based and sector-based associations in the implementation of non-regulatory instruments.

We recognise that there will need to be broad consultation with stakeholder groups on some recommendations, such as the extension of licence tenure. The Committee also acknowledges that the Authority has already begun to implement some of the recommendations outlined in this report.

## **LIST OF RECOMMENDATIONS**

*R.1 The Committee recommends that a working group be established to consider the advantages from collecting more accurate data on the value of Great Barrier Reef tourism and the role of the industry in the regional economy. Such a group should include representatives of GBRMPA, the marine tourism industry and other tourism interests, the CRC, the Australian Bureau of Statistics and State and Commonwealth tourism research and policy agencies.*

*R.2 Insofar as it moves away from individually assessed and allocated permits towards more generic licences, and place-based rules relating to individual areas and sites, the Committee endorses the proposed new management regime. We believe that the proposed new Plans of Management and the licensing regime, when combined with place-based management involving codes of practice and clubs or associations, have the potential to be a fair and cost-effective new way of managing the cumulative impacts of Reef use, without constraining the international competitiveness of the marine tourism industry.*

*R.3 We recommend that the Authority develop a policy document which will provide a strategic context to the management instruments being developed and what they are intended to achieve. Such a document should also describe how these tools will be used Reef-wide and include details and timing of implementation. This statement should be released with the next version of the Plans of Management and licences.*

*R.4 The Committee recommends that, subject to the amendments we have proposed elsewhere in this report, the planning and management regime proposed for the Cairns and Whitsunday areas be adopted throughout the Marine Park. This does not mean that Plans of Management need to be implemented in more remote and less intensively-used regions, but that they should be looked upon as a template for future implementation if and when this level of detailed management is required.*

*R.5 We recommend that provisions dealing with the generic design of licences and the treatment of existing user entitlements be removed from the Plans of Management and be dealt with through regulations and policy statements. Plans of Management should be confined to the management of settings and sustainable limits on use for particular areas, sectors, localities, locations and sites.*

*R.6 In redesigning the Plans of Management to remove generic provisions relating to the operation of licences, it will be necessary to retain in the Plans provisions to protect sensitive sites through some alternative form of the spatial controls.*

*R.7 While the Plans of Management specify how many moorings and pontoons can be located in specific localities, it will be necessary for the Authority to maintain a register of these moorings and pontoons and the current holders of the licences associated with them.*



R.8 We consider it to be important that the Authority document the decision-making processes which have led to site allocations and other restrictions on access to areas and locations.

R.9 A strong view was expressed by the Committee that when the Authority does intervene in amenity issues, it should do so at the planning stage and only after consultation with community and industry as a whole. It is not appropriate for the Authority to make ad hoc interventions in individual licensing approvals in order to manage amenity.

R.10 The Committee recommends that the Authority issue two separate kinds of licence: (i) a general right to operate on the Reef which would apply to all tourism operators; and (ii) entitlements to specific sites.

R.11 We believe that an effort should be made to reduce unused capacity prior to moving to the new system. A number of options for doing this have been identified, in addition to the ones already built into the new management regime. The Committee is strongly of the view that existing users who have been operating actively should have their entitlements (or some equivalent) transferred across to the new system of licences.

R.12 It is recommended that the Authority formalise its policies on the allocation of new sites. The Committee is not in favour of auctioning entitlements, and we are of the view that the fundamental allocative principle should be first-come, first-served (subject to environmental suitability). We recognise that some qualifications to this may apply where the first applicant is not easily determined, where there are multiple historic users of a site, and so on.

R.13 The Committee recommends that the Authority review all of its current policies and practices governing alteration of the terms and conditions of licences, including revocations and non-renewals. This should be undertaken in order to ensure that the Authority has the legal power necessary to protect the environmental, cultural and presentation values of the Reef.

R.14 The Authority also needs to state clearly its policy on renewal in circumstances where amendment, revocation or non-renewal is not required.

R.15 The Committee recommends that the Authority specify in writing the conditions under which a licence might be amended, revoked or not renewed, and the procedures which would be adopted in a review of this kind.

R.16 In the event of there being a need to amend, revoke or not renew a licence for some reason other than irresponsible behaviour on the part of the operator, the Committee favours the current policy of working with operators to find alternative sites rather than 'buying back' entitlements.

R.17 Where it is necessary for a licence to be revoked or not renewed because of irresponsible behaviour on the part of an operator, the Committee recommends that the Authority immediately withdraw the entitlement to operate,

*but that operators be allowed to transfer their licences to other operators approved by the Authority.*

*R.18 After some discussion, the Committee agreed to recommend a period of 15 years for tourism licences, based on the time horizons used by financial institutions. This should be subject to the completion of the review of policies referred to in Recommendation 13.*

*R.19 The Committee recommends that, prior to any move to extend licence tenure, steps be taken to remove or to substantially weaken as many as possible of those permits held by operators which have not been used for some years. Having said this, we would also not want this process to unduly delay the shift to a more stable management regime.*

*R.20 The Committee recommends that role of the Tourism Advisory Group be formalised as a permanent non-statutory, competency-based forum.*

## 1. INTRODUCTION

### 1.1 Background to the Marine Tourism Review

The Great Barrier Reef Ministerial Council, at its 22<sup>nd</sup> meeting in November 1996, agreed to proceed with a Review of the Marine Tourism Industry in the Great Barrier Reef World Heritage Area, to be completed by June 1997. This Review had originally been proposed at the Ministerial Council's 21<sup>st</sup> meeting, but had been delayed because of changes to the composition of the Council brought about by the change of Federal government in March 1996.

### 1.2 Scope of the Review

The Great Barrier Reef Ministerial Council directed the Marine Tourism Review to report to its subsequent meeting to be held in June 1997. In recognition of the time-frame for completion of the Review, and also acknowledging the large body of information already available on a number of the Terms of Reference (see frontispiece), the Review's main focus of attention was to be an examination of the following matters:

- *the latent capacity that exists in the number of tourism permits that have been issued to date and options for managing latency;*
- *security of permits held by industry;*
- *mechanisms for resource allocation in both the long and the short term; and*
- *consultative mechanisms with the industry.*

In focussing on these key matters (primarily Terms of Reference 4 and 5) the Steering Committee was to provide advice as to whether the proposed tourism management strategy and licensing system is robust, practicable to implement and capable of meeting management and industry needs into the foreseeable future.

The Review was to be conducted in accordance with the statutory obligations of the Marine Park Authority as prescribed in the *Great Barrier Reef Marine Park Act 1975* and be consistent with the need to ensure protection, conservation and presentation of the Great Barrier Reef World Heritage Area. It was also to draw upon relevant outcomes of the *Brown Review of the Great Barrier Reef Marine Park Authority* (due to report in March 1997) and to pay particular attention to work conducted under the *Reef Tourism 2005 Project*.

The focus of the Review was to be marine tourism operations, including air and water-borne activities, and only including infrastructure actually located within the boundaries of the Marine Park. The Review was not intended to address the management or environmental impacts of the tourism components of developments in the adjacent coastal strip (such as resorts and marinas). The Review was not to deal with the existing Environmental Management Charge nor the introduction of a Visitors' Charge which arose out of proposals in the 1996-97 Federal Budget.

### 1.3 Conduct of the Review

The Marine Tourism Review was jointly funded by the Great Barrier Reef Marine Park Authority and the Department of Industry, Science and Tourism through the Office of National Tourism. The Review was overseen by a Steering Committee consisting of an independent chairperson, representatives of government, and persons with specific expertise in marine tourism (3 members), financial aspects (1 member), indigenous interests (1 member) and conservation issues (1 member). Day to day work was undertaken by a Working Group consisting of officers from the Office of National Tourism, the Queensland Department of Tourism, Small Business and Industry and the Great Barrier Reef Marine Park Authority.

Immediately following the November 1996 Ministerial Council meeting nominees were invited to participate in the Steering Committee. Steering Committee members subsequently appointed were:

- Mr Gary L. Sturgess (Chairperson)
- Mr Mike Burgess
- Mr Ed Green
- Mr Brian Rogers/Mr Graham Lee
- Mr Robert Maher A.M.
- Ms Evelyn Scott
- Ms Wendy Morris
- Mr Bob Speirs (Queensland Department of the Environment)
- Mr David Mazitelli (Department of Industry, Science and Tourism)
- Mr Mark Peters (Queensland Department of Tourism, Small Business and Industry)
- Dr Ian McPhail (GBRMPA)

Following the first meeting of the Steering Committee, Mr Brian Rogers was represented by Mr Graham Lee, the chairperson of the Tourism Advisory Group. Unfortunately, Ms Wendy Morris, who had been appointed as a person with expertise in conservation matters, was also obliged to resign part way through the Review for reasons related to her work. Some consultation with conservation groups was undertaken directly by the Chairperson and indirectly through GBRMPA. Detailed economic research was undertaken on behalf of the Review by ACIL Economics and Policy Pty Ltd of Canberra and Stratos Consulting Pty Ltd of Sydney.

The Report of the Marine Tourism Review is presented in two parts:

- Part 1 - Key Findings and Recommendations  
*This volume, which addresses the main issues as outlined above and relates primarily to Terms of Reference 4 (economic factors) and 5 (consultative mechanisms).*
- Part 2 - Supporting Information  
*This second section includes the contextual and background information required to be reviewed and considered by the Review Steering Committee in addressing the key economic issues and the matter of consultative mechanisms.*



## 2. TOURISM USE MANAGEMENT IN THE GREAT BARRIER REEF WORLD HERITAGE AREA

### 2.1 The Great Barrier Reef Marine Park and World Heritage Area

The Great Barrier Reef Marine Park was established under Commonwealth legislation in 1975 following a protracted national debate about the need for the protection of the Reef from a range of threats, most prominently, oil and mineral exploration and extraction. A national icon, the Great Barrier Reef enjoys the highest level of support from the national and international community for its careful management and protection.

The Great Barrier Reef Marine Park Authority, also established under the 1975 Act, has been charged with the responsibility for ensuring the 'care and development' of the Great Barrier Reef Region in line with its primary obligation, which is the 'conservation of the Great Barrier Reef'. The Act provides that management of the Marine Park must be in accordance with the following objectives:

- (a) the conservation of the Great Barrier Reef;
- (b) the regulation of use in the Marine Park so as to protect the Great Barrier Reef, while allowing the reasonable use of the Great Barrier Reef region;
- (c) the regulation of activities that exploit the resources of the Great Barrier Reef so as to minimise the effect of those activities on the Great Barrier Reef;
- (d) the reservation of some areas of the Great Barrier Reef for its appreciation and enjoyment of the public; and
- (e) the preservation of some areas of the Great Barrier Reef in its natural state undisturbed by man except for the purposes of scientific research.

In 1981, the extraordinary value of the Great Barrier Reef was further recognised with the listing of an area slightly larger than the existing Marine Park as a World Heritage property under the international World Heritage Convention, to which Australia is a signatory. This means that the Great Barrier Reef is also subject to the Commonwealth's *World Heritage Properties Conservation Act 1983*, which provides the legislative framework whereby Australia can meet its obligations to do all that it can 'to the utmost of its resources' to ensure 'the identification, protection, conservation, presentation and transmission to future generations of the cultural and natural heritage' within its territory.

A 1995 amendment to the Marine Park legislation enabled the Authority to develop statutory Plans of Management. It recognised the Authority's broadened responsibilities flowing from World Heritage Listing, by requiring that statutory Plans of Management 'must have regard to (a) the protection of world heritage values of the Marine Park; and (b) the precautionary principle'.

A *25 Year Strategic Plan for the Great Barrier Reef World Heritage Area* was released in 1994, following extensive consultations with government agencies,

industry and other user groups. The purpose of the Plan was to develop a shared vision and goal for management of the Reef across the broadest range of stakeholders. The concept of *ecologically sustainable use* was a cornerstone of the strategic planning process, but in addition to environmental values, the Plan addresses obligations in relation to cultural and heritage values. Regardless of any future determinations regarding the existence of indigenous land and sea rights with the Great Barrier Reef Region, the Authority is committed to the identification, recognition and protection of indigenous (and non-indigenous) cultural heritage within the World Heritage Area.

## **2.2 Tourism on the Great Barrier Reef**

Growth in the number of international visitors to the Great Barrier Reef region has been high in recent years, while the number of trips to the region by domestic visitors has been stable. The number of international visitors in 1995 was over 700,000, up from 500,000 in 1991. Around 20 percent of visitors to Australia go to the Reef region. There are over 2.7 million domestic visits to the region each year, of which 80 percent are from Queensland. A notable characteristic of tourism to the Great Barrier Reef region is that 85 percent of international visitors to the entire region go to Far North Queensland. To a large degree this reflects the provision of airlinks and supporting infrastructure in Cairns.

Data provided by the Environmental Management Charge (EMC) indicates that 1.6 million visitor-days were spent on the Reef in 1996. About one third to one half of these visitors were from overseas. Three quarters of international visitors to the region take some form of trip out to the Reef. A high proportion of North American, European and Japanese tourists visit the Reef. Visitors from other parts of Asia have historically been less likely to go to the Reef, however numbers are increasing, partly because of operators who are refining their wholesaling and marketing mechanisms, and tailoring their products to suit different markets.

The Marine Tourism Industry on the Great Barrier Reef consists of six sectors: island transfer, day tours (site specific and roving), live aboard dive, fishing charter, bareboat charter and general charter. The island transfer and day tour sectors are by far the largest part of the industry.

The industry is spatially concentrated, with 95 percent of visitor-days taking place on 4 percent of the reefs. Moreover, this is concentrated in the Cairns/Port Douglas region (67 percent of visitor days) and the Whitsundays (28 percent of visitor days). Visitation tends to follow a seasonal pattern, with higher numbers in the second half of the calendar year.

There are around 660 commercial operations in the Marine Park using 900 vessels. Of these, about 80 are site-specific and 440 are regular rovers. Five major operations account for more than a third of total visitor-days and focus on the inbound tourism market which makes up over 70 percent of their business. The major operations rely on a high proportion of prepaid and packaged

bookings. The next 15 largest operators generally have around one percent of the market each. Smaller operators tend to rely more on sales to independent travellers through local agents. The bareboat charter industry in the Whitsundays has very distinct characteristics, with pre-booked multiple day charters and almost 90 percent of their business coming from the domestic market.

The ability of the Great Barrier Reef to provide a range of visitor experiences for increasing numbers of tourists will depend to some degree on gaining access to parts of the Reef that have in the past been inaccessible due to weather conditions and the distance from shore. Changes to visitor patterns in this regard will need to come from advances in marine transport technology.

The development of high-speed catamarans carrying up to 450 people at a time has significantly increased the number of people accessing the outer Barrier Reef over the past two decades. Further changes are likely to occur if new vessels, such as the wing-in-ground effect craft (WIGs), prove to be commercially viable. WIGs are fixed wing vessels which fly at high speed less than 5 metres above the earth's surface in order to gain aerodynamic efficiency. Some WIGs are under development in Australia and if they were to prove technologically and commercially viable, they would have the potential to open up many of the largely unused areas of the Reef.

Over time it is likely that provision will need to be made to improve access for international visitors to parts of the Reef outside Cairns. While there are already international access rights to Townsville, this may not be the most appropriate stepping-off point for increased reef visitation until significant changes in marine technology become commercially available.

Australia is competing internationally with other destinations offering coral reef experiences, particularly in South East Asia (especially Indonesia) and the South Pacific. The long term commercial viability of the tourism industry on the Reef depends upon it being able to sustain high standards of service, delivering a high quality product across a range of experiences and meeting best practice environmental management benchmarks in its daily operations. Australia is a long haul destination and it cannot hope to compete on price alone. Workforce training and the development of professional industry standards through accreditation schemes and the like, will be key elements in maintaining industry competitiveness.

Some estimates suggest that tourism contributes slightly less than 10 percent of Gross Regional Product (GRP) in the Far North Region, and slightly less than 5 percent of GRP in the Northern Region. Alternatively, a 1996 study by Coopers and Lybrand estimated that in 1994, the contribution of tourism to the Far North Queensland economy was 25 percent of GRP. Expenditure figures for the Great Barrier Reef region indicate that in 1990/91, tourism expenditure was \$1.7 billion, which is equivalent to 12 percent of total GRP.

As regards the importance of reef-based tourism to the regional economy, the 1994 GBRMPA research publication, *Protection for Profit*, concluded that the

gross financial values of the Great Barrier Reef World Heritage Area were \$682 million in 1991/92, of which \$134 million was directly attributable to commercial tour operators. When compared with the estimated expenditure for tourism in the Reef region in 1990/91, this implies a contribution of 40 percent of total regional tourism expenditure, and almost 5 percent of GRP.

One of the major difficulties in assessing the economic value of the Great Barrier Reef is the lack of accurate data on the value of tourism (and marine tourism in particular) and its relationship with the regional economy. While data from the Environmental Management Charge and work being conducted for the Cooperative Research Centre for Ecologically Sustainable Development of the Great Barrier Reef (CRC) help in better understanding some aspects of visitor trends, these are still limited in the assistance which they provide in understanding the financial contribution of tourism.

*R.1 The Committee recommends that a working group be established to consider the advantages from collecting more accurate data on the value of Great Barrier Reef tourism and the role of the industry in the regional economy. Such a group should include representatives of GBRMPA, the marine tourism industry and other tourism interests, the CRC, the Australian Bureau of Statistics and State and Commonwealth tourism research and policy agencies.*

### **2.3 Impacts on Marine Tourism Use on the Great Barrier Reef World Heritage Area**

*Ecological Impacts:* The impacts of marine tourism use of the Great Barrier Reef have been discussed and reviewed in a number of papers in recent years (discussed at greater length in Part 2 of this report). In general, it is considered that the ecological impacts of specific tourism operations in the Marine Park are relatively localised and, to date, they have been reasonably well-predicted and managed. In part because of the physical isolation of the Reef, but also because of early intervention by government and a responsible attitude on the part of major tourism operators, the conservation values of the Great Barrier Reef have been well-protected.

Tourism activities in the Marine Park tend to be concentrated in the heavily-used marine and island locations, particularly in the Cairns-Port Douglas and Whitsunday areas. The major threat to conservation values posed by marine tourism is interference with vulnerable species such as humpback whales, dugong, nesting seabirds and turtles. The Whitsundays is a calving area for humpback whales, and thus there is a need to address protection of the species in what is a very intensive tourism location. Some of the Great Barrier Reef islands which are important nesting or roosting sites for seabirds are also popular tourism destinations. Certain areas, particularly in the Capricorn-Bunker group, are also important nesting areas for sea turtles.

In many instances, tourists are excluded from sensitive nesting sites, however some sites, such as Michaelmas Cay offshore from Cairns, have historically high levels of permitted use which are now being recognised as unsustainable.



Impact on these sites is directly related to trampling by tourists walking on the cays and can most effectively be managed by limiting access to sensitive sites. The marine tourism industry is working with the Queensland Department of the Environment and the Authority to find an ecologically sustainable solution to the problem which has emerged on Michaelmas Cay.

Coral damage is another major impact caused by marine tourism operations. There is evidence that recurrent damage to corals in sheltered sites may alter their composition, with more robust species replacing fragile corals over time. The greatest concern in this regard is anchor damage caused by private and commercial tourism and fishing vessels. Some limited information on anchor damage and the recovery of corals is available from the Whitsunday region and the Cod Hole in the Cairns region. In the Cairns Section, the trend towards the use of moorings and pontoons has been successful in reducing anchor damage.

In the past there were also concerns about the effects of pontoons on the loss of corals in the shadow of the structure, damage caused during installation and ancillary effects such as changes in local fish communities caused by the attraction of larger predatory fish. As these impacts have become known, remedial management practices have been introduced to mitigate the effects.

While environmentalists are concerned about these issues, of much greater concern to them is an issue which is beyond our terms of reference - the impact of land-based activities on the Reef. Limited data are available on the impacts of such development, but the Authority's concerns regarding coastal development and land use are receiving increased attention.

*Social and Cultural Impacts:* The Great Barrier Reef Marine Park Authority has given first priority to the minimisation of impacts of an ecological nature. However, as tourism use of the Marine Park grows, especially off Cairns and Port Douglas, social and cultural issues are receiving much greater attention in zoning, management planning and permit assessment.

Growth in the tourism industry has contributed to some displacement of traditional and historic use, notably private recreation and traditional hunting and fishing. While little research has been undertaken on social and cultural impacts of marine-based tourism, increasing concern from affected stakeholders and park managers has led to these issues having a much higher profile in planning and management processes.

In the case of indigenous users, there is concern about loss of access to traditional hunting grounds and damage to and impairment of significant cultural sites and values. This has been highlighted in a number of native title claims for rights over islands and surrounding sea bed areas. While these claims are awaiting the outcome of a test case involving Croker Island off the Northern Territory, the Authority's responsibility for protecting and managing the social and cultural values of the Reef is enshrined in the Marine Park legislation, and has been expanded as a result of World Heritage obligations.

*Presentation Values:* Complex value judgements arise in considering the 'presentation' values of the Great Barrier Reef, which arise because of its World Heritage listing. On the one hand, strong growth in tourism and in the demand for access to the Reef is clear evidence that the presentation of the Reef by the tourism industry is a valued natural experience for a large and growing number of people. On the other hand, if the impacts of these large numbers of visits to the Reef were not adequately managed, it would diminish the quality of the 'presentation' experience.

The Marine Park is being actively managed for multiple use on a sustainable basis, so it is perhaps inevitable that in some of the more developed areas, some conflicts between different kinds of users will occur. The tourism industry is aware that the enjoyment of Reef tourism can be diminished by the presence of large numbers of vessels, and it supports the objective of the Authority to plan for a diverse range of tourism experiences.

## **2.4 Tourism Use Management in the Great Barrier Reef World Heritage Area**

*Past Approaches to Tourism Use Management:* The *Great Barrier Reef Marine Park Act 1975* prescribed the basic management framework for the Authority at its inception. An additional tier was added to this overarching management hierarchy in 1994, with the adoption of the *25 Year Strategic Plan for the Great Barrier Reef World Heritage Area*.

In the past, tourism use in the Marine Park was managed principally through Zoning Plans for each of the 4 Marine Park Sections; and permits, with assessment against criteria. These were supplemented by education and training, some non-statutory plans, internal policy and Special Management Areas for small sensitive sites.

Although Zoning Plans have been a major and integral component of Marine Park management, their primary effect has been to define where extractive industries, such as trawling, line fishing and collecting are allowed. Tourism management has not been explicitly addressed in the Zoning Plans, principally because, in the early years, tourism use was very low. Consequently, tourism use is allowed, subject to permit requirements, in more than 99 percent of the Marine Park.

Until recently, the principal tool used to manage tourism in the Marine Park has been the permit system. Permits are administrative instruments used to grant access and use permissions to commercial operators who apply on a 'first-come, first-served' basis. Through their detailed conditions, permits specify what the holder can do within the broader provisions of the Zoning Plan. This system of permits has been reviewed on a number of occasions and periodically revised. The tenure of permits has been increased from 1 year, to 3 years and, since 1993, to 6 years. Transfer of permits has also been approved, and limited trading has taken place.

*The Proposed Strategy for Managing Marine Tourism Use:* The rapid growth and the changing nature of Marine Park tourism have increasingly challenged the Authority to reconsider its approach to managing marine tourism use. In order to more effectively manage the impact of tourism use, the Authority has for several years been developing a new planning and management regime. The major elements of this new approach will be:

- strategic planning. A clear strategic direction is to be established for the management of marine tourism in the Marine Park;
- direct management tools. The Authority will establish well-defined, effective and enforceable management controls to protect the values of the Marine Park;
- self-regulation by industry; and
- active partnerships with industry and other stakeholders.

Strategic planning is being pursued primarily through the development of a *Reef-wide Plan for Managing Marine Tourism Use*. This plan will identify the natural, cultural, heritage and use values which could potentially be affected by tourism; define the management requirements necessary to protect these values; define areas appropriate for different settings of marine tourism use; and establish limits to marine tourism use where necessary. It will be implemented through Zoning Plan amendments, statutory Plans of Management, changes to regulation and policy, and education.

Statutory Plans of Management for the Cairns and Whitsunday areas are currently being prepared, following extensive public consultation and stakeholder input. They are expected to be finalised in the coming months. A Dugong Management Plan for Shoalwater Bay has also been completed. Work in progress includes a review of the Northern Section Zoning Plan and a recently-announced Plan of Management for the Hinchinbrook area.

Once the Plans of Management have been finalised for the Cairns and Whitsunday areas, final steps will be taken to simplify permits and replace them with a new system of licences. The final shape of this new management scheme is still being developed and it is dealt with more fully in the section which follows.

### 3. REVIEW OF THE PROPOSED MARINE TOURISM USE STRATEGY

#### 3.1 Guiding Principles for the Review

In undertaking this Review, the Committee sought to understand what the Authority and marine tourism operators need from a management regime. We have tried to understand the principles which underlie the current review of management instruments, in order to determine whether they are soundly based or whether they need to be fundamentally rethought. As a result of this fundamental analysis, the Committee has broadly endorsed the conceptual approach which has been adopted by Authority staff in undertaking this review.

- The primary objective of Marine Park management remains the conservation of environmental, cultural and heritage values of the Great Barrier Reef, in the national interest. To the extent that it is consistent with this primary objective, commercial value should be optimised (also looked at in terms of benefit to the nation as a whole).
- The Authority has obligations under international conventions to 'present' the World Heritage Area and it relies on the marine tourism industry as a primary vehicle for presentation. The Committee endorses this approach which necessarily involves the industry in the pursuit of the highest standards of operation and a key role in the education of visitors to the Reef.
- Setting aside parts of the Reef for conservation must be seen as legitimate 'use'. Looking on conservation areas, including culturally significant areas, as a kind of 'non-use' undermines a long-term perspective on management for environmental and cultural ends.
- The key conceptual shift in the proposed new management regime is a move from the management of individual operators to spatial or place-based management. The Committee strongly endorses this approach.
- As a general rule, the primary purpose of managing activity on the Reef should be to prevent and to manage *impacts*. There should be little difference between the approach used to manage public and private uses within the Marine Park if the impacts of such use are similar.
- One of the principal concerns of the Authority in its present review of management instruments has been the desire to better manage *cumulative* impacts. The Committee shares the view that the management tools available to the Authority must enable it to monitor, assess and regulate cumulative effects and not merely the marginal impact of each new operator.
- It is not the function of the Authority to guarantee the commercial success of the tourism industry or of particular tourism operators, although it does have an obligation to provide them with a stable and predictable regulatory framework within which to operate.



- In designing a new management regime, Marine Park managers are developing a system of user entitlements which will, as much as possible, give marine tourism operators a long-term interest in the protection of the environment. The Committee supports this approach.
- Within appropriate regulatory constraints, we support the use of instruments which increase choice and flexibility in the marine tourism industry. Where government regulation is not required to manage environmental, cultural and social impacts on the Reef, tourism operators should have the freedom to innovate with new tourism experiences, and management instruments should be flexible enough to accommodate this innovation.
- Successful management of the Marine Park environment must involve government, industry and the local community in a sustainable partnership. The Committee strongly endorses the involvement of tourism operators in co-management practices such as place-based industry associations and codes of practice.
- The Committee endorses reforms which will accommodate the interests of indigenous groups in the management of their traditional areas.

### **3.2 The Shift to Spatial Management of Impacts**

The review of the Marine Park tourist permit system in 1994 recommended a radical change away from the existing system of detailed individual assessment of applications for access and use, towards a much simplified and generic system of permits or licences, coupled with an improved system of planning, education and codes of practice.

Such a shift would be made possible by the removal of necessary rules and conditions of access out of the individually-tailored permits and into plans and regulations, where impacts would be managed through the application to all users of restrictions relating to each area or site.

This spatial approach to the management of impacts requires an up-front assessment of the sustainable limits of each individual site or area, the development of regulatory instruments able to keep impacts within those limits, as well as instruments which are capable of meeting the industry's need for competition and innovation. Under this new approach, a new system of allocating sites would be required, to ensure fair treatment of existing operators and new entrants.

*R.2 Insofar as it moves away from individually assessed and allocated permits towards more generic licences, and place-based rules relating to individual areas and sites, the Committee endorses the proposed new management regime. We believe that the proposed new Plans of Management and the licensing regime, when combined with place-based management involving codes of practice and clubs or associations, have the potential to be a fair and*

*cost-effective new way of managing the cumulative impacts of Reef use, without constraining the international competitiveness of the marine tourism industry.*

### **3.3 The Need for a Strategic Context for the Proposed New Tools of Management**

Effective management of marine tourism requires a strategic outlook. While the proposed new management approach (implemented through Zoning Plans, Plans of Management, licences, codes of practice and the like) will give the Authority greater capacity to cope with the cumulative impacts of Reef use, it is essential that these diverse policy and regulatory instruments, and the manner in which they will be used, are set in the context of a clearly articulated, long-term vision for marine tourism on the Reef. Without such a strategic policy document, there is the danger that the industry, stakeholder groups and, indeed, managers within the Authority itself, will lose sight of what these instruments are meant to achieve.

On the other hand, given the complexity of these management instruments, and the need for timely action, particularly in the Cairns and Whitsunday regions, it was essential for the Authority to first undertake detailed research on the design of these tools. Without some grasp of these fundamental design issues, the kind of strategy document which we are contemplating would not have made sense.

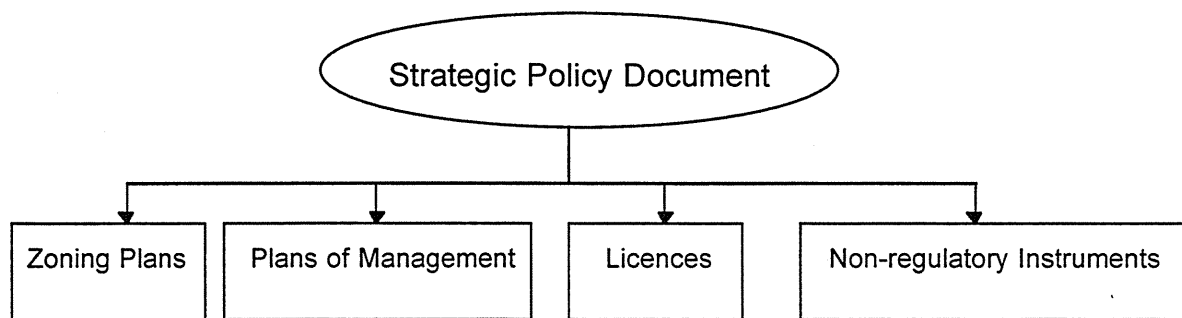
Nevertheless, we are concerned that the strategic context of these proposed new instruments is understood by only a small number of officials within the Authority. Key decisions are about to be made about the future regime of management which will govern marine tourism on the Reef and, in our experience, it will be most difficult for these decisions to be well-informed, or widely understood, without a strategic document of the kind we have described.

The most important source of such a document will be the analysis which has formed the foundation to the present permits review. Those officials who have been involved in the development of this new regime need to commit their understanding to writing. The *25 Year Strategic Plan* will be another of the inputs, as will the proposed *Reef-wide Plan for Managing Marine Tourism Use*.

The Committee recognises the work which has already been undertaken by the Authority in developing with tourism operators a *Position Statement on Tourism Use of the Great Barrier Reef Marine Park* (see Part 2 Appendix B). This statement, which is still in draft form pending adoption by the Marine Park Authority, sets out the Authority's approach to tourism use and will also serve as an input into the strategic policy document envisaged in this section.

*R.3 We recommend that the Authority develop a policy document which will provide a strategic context to the management instruments being developed and what they are intended to achieve. Such a document should also describe how these tools will be used Reef-wide and include details and timing of*

implementation. This statement should be released with the next version of the Plans of Management and licences.



### 3.4 Zoning Plans

Zoning Plans have their basis in the Marine Park legislation and for some time they have formed an integral component of Marine Park management. For historic reasons, however, they have not dealt with tourism use explicitly. As their name suggests, Zoning Plans are somewhat equivalent to town plans, where broadly-defined use areas are specified and where some flexibility and choice can be exercised within these broad constraints. Setting up pre-ordained use patterns of this kind typically involves managers putting forward proposals and subjecting them to extensive public consultation. The objective is to develop a set of use rules which all parties can accept, for the present at least.

A range of pressures is now emerging to be more prescriptive about what can be done and where, and to reduce areas of unrestricted use. Previous reviews of tourism use by the Authority have discussed the potential for incorporating more instruments for tourism management into the Zoning Plans.

The Committee considers Zoning Plans to be an appropriate instrument for defining the 'big picture' settings for use and access. This must include a recognition of the significant role of marine tourism and ensure a diversity of tourism experiences across the Marine Park. The No Structures Subzone in the current Cairns Section Zoning Plan and the Wilderness Zone proposed for the Far Northern Section are two examples of broader scale actions appropriately addressed through zoning.

In areas of more intensive use, such as Cairns and the Whitsundays, Plans of Management are a more appropriate instrument for regulating tourism and other uses, and we endorse the Authority's present efforts to extend Plans of Management into areas coming under increasing pressure. In areas of low use, revised Zoning Plans will be sufficient for the present.

It is recognised, however, that even 'big picture' rules will be subject to periodic change as community views on the balance of use change, and as information on impacts and the compatibility of different uses grows.

### 3.5 Statutory Plans of Management

Statutory Plans of Management are a new tool for managing tourism activity on the Reef and they will be the primary vehicle for the shift to placed-based management. At present, the principal means of regulating tourism activity within the broad-defined settings of the Zoning Plans are the permits which individually stipulate where each and every authorised operator can go and what they can do. The draft Plans of Management for Cairns and the Whitsundays, which are substantially complete, set limits on and constrain activities in particular areas.

Each of these Plans of Management adopts a similar approach, but the draft Plan of Management for the Cairns Area, for example, regulates a hierarchy of areas or sites, starting with the *Area*, down through *Sectors*, *Localities*, *Locations* and *Sites*. Thus the Cairns Area Plan of Management is concerned with an *Area* which (in general terms) reaches from Lizard Island in the north to the Frankland Islands in the south. This *Area* is, in turn, divided into six *Sectors* and within each of these *Sectors*, a number of *Localities* have been specified. Only one *Locality*, the Cod Hole Locality, has been specified in the Ribbon Reefs Sector, but most contain several.

*Locations* are more specific spaces roughly associated with identified reefs. They are described as the area seawards out to the 500 metre line of a reef (although in some cases they may refer to a *locality*). Again, the reefs (and *localities*) which are defined as *locations* have been identified as such in the Plans of Management. Finally, the term *site*, while not defined in the Plans of Management, refers to quite specific geographic points where pontoons or moorings are located or where anchoring is permitted.

*Nature Conservation Values:* In the Cairns Area, the Authority has described the various conservation values of the different *sectors*, and some *locations*, but the background notes to the draft Plan of Management do not specify zones which are exclusively for conservation purposes.

*Cultural and Heritage Values:* Based on consultations with local Aboriginal groups, the Plans of Management will specify a number of *locations* which are of value for the purposes of traditional hunting, fishing or collecting. While marine tourism will not be prevented at these *locations*, growth will be severely constricted. It has also been proposed that the coastal region adjacent to the Offshore Port Douglas Sector and the Frankland Islands Sector comprise part of the Wet Tropics World Heritage Area. The Authority proposes that there will be limited coastal development in this area.

*Game Fishing and Recreational Use:* It is proposed that game fishing be recognised in three *sectors*. Likewise, a large number of *localities* (principally inner reefs) have been specified for recreational use.

*Marine Tourism Use:* The background notes to the draft Cairns Area Plan of Management contain no discussion of the *localities* or *locations* which are available for use by marine tourism. The Committee has been advised,

however, that Marine Park managers have carefully studied each *location* and formed a professional judgement as to the number of pontoon or permanent mooring sites which each can sustain.

Anchoring will be totally prohibited at mooring and pontoon *sites*, and within the *Cod Hole Locality*, but not elsewhere in the Cairns Area. There will, however, be a prohibition on anchoring on coral and anchoring by large vessels will be prohibited in specific *locations*. In theory, the Authority could introduce a tightly-managed system of management by prohibiting anchoring completely and requiring all operators to use a mooring. In practice, this is not feasible for reasons of cost, and because of the undue restrictions which it would place on roving operations and recreational users.

There will also be restrictions on vessels of certain sizes entering specified locations. It is primarily through this provision that the Authority will exercise control over amenity values, ensuring a range of experiences structured according to vessel size. Thus, for example, in the *Ribbon Reefs Sector*, a vessel carrying more than 60 people will only be allowed in *Ribbon Reef Locations Numbers 2 and 5*. The remainder of the *locations* in this *sector* will only be open to smaller vessels.

In a number of sensitive *locations*, additional controls have been proposed. For example, restrictions on mooring at the *Cod Hole* will be extremely tight. A person will not be able to undertake activities in this *locality* unless those activities are conducted from a vessel attached to a mooring. This will give considerable leverage to those operators belonging to the *Cod Hole* and *Ribbon Reefs Operators Association* who have exclusive use rights to 2 of the 4 moorings in this *locality*. The draft Plan of Management prescribes that a person must not moor a vessel to either of the 2 public moorings for more than 4 hours in any 24 hours.

Likewise, there are considerable restrictions on the use of vessels in the *Michaelmas Cay Locality*, a sensitive bird nesting and breeding site. Since activities on the *Cay* itself are the responsibility of the Queensland Department of the Environment, they are not dealt with in the Plan of Management.

Sensitive sites are specified in the draft Plans of Management, where it will be necessary for operators (essentially rovers) to book with the Authority in order to anchor.

### 3.6 Operating Licences

At present the potential exists for an unlimited number of permits and, because of the individualised nature of these permissions, there is virtually an unlimited number of categories. In practice, it is possible to distinguish four broad classes of operators: site-specific, roving, bareboats and others (including gamefishing charters, aircraft and the like). But, as the rules are presently constructed, it is difficult to constrain the shifting of effort from one class of use to another, with the potential for latent or 'sleeping' permits to be activated in

sensitive or frequently-visited locations. It is for this reason that the Authority currently has such limited control over cumulative impacts.

As presently constructed, the draft Plans of Management will provide for five broad categories of licences or permissions:

- site-specific operations - operations which run to the same *site* on a regular, even daily, basis. Sites can include certain bays and moorings or fixed structures such as pontoons, and operations may cover a range of activities carried out at one or more sites during each trip;
- regular roving operations - these operators visit a variety of locations throughout the Reef, but tend to have regular sites and itineraries which rely on access to known destinations on a fairly regular basis;
- itinerant roving operations - operations which require almost unlimited access throughout the Reef (except for standard exclusions from sensitive sites). They have irregular itineraries which may change during the course of a trip;
- bareboat operations - particularly prevalent in the Whitsundays because of the large number of islands and bays close to shore, these operators hire sail and motor boats to tourists who, in many cases, have little or no maritime experience. Although essentially rovers, they tend to frequent commonly known sites because of their inexperience; and
- cruise ships, gamefishing charters, aircraft, ferries and watersports - operations which, while not great in number, have specific characteristics or requirements which demand additional conditions to a standard permission.

Because of the tight spatial controls which will now exist under the Plans of Management, it will not be necessary to regulate the number of vessels holding site-specific licences. If an operator can negotiate with another operator to obtain access to an existing mooring or pontoon, this will not be a matter of concern to the Authority (provided they abide by existing use rules). Because of the nature of operations in the Whitsundays, there will be few site-specific licences in that area. It is anticipated that there will be approximately 260 site-specific licences in the Cairns Area.

It is proposed that the number of licences for regular roving operations be limited to those who have been actively using their permits in this manner in recent years. In the Cairns area this will be limited to 250 operators, with a need to manage somewhere around 150 additional operators who have permits but have not been active. These will be classified as itinerant rovers. In the Whitsunday, the number of regular rovers would be 130, to be reduced from a total of 430.

All other operators will be confined to the category described here as 'itinerant rovers', with a ceiling of 50 days per year in each *area* of the Reef. This 50 day limit is principally a device for managing down latent capacity. Since many of the individuals presently holding open permits have rarely or never used them, the transition to 50 day roving licences will leave some redundancy, but because these 50 days will be controlled by bookings and not be transferable, it will, in practice, result in very little latency. It is anticipated that there will be somewhere

around 150 itinerant rovers in the Cairns Area and 300 in the Whitsundays, although there is no proposal to place a cap on the issuance of these licences. Scarcity would be managed through bookings.

At present there are 323 permitted vessels for bareboat operations in the Whitsundays, although only about 200 of these vessels are being used on a regular basis. Since the cap was introduced in December 1996, active trading in these permits has reportedly begun, at a price of around \$3,000 a vessel. It is expected that the transition to the new regime and the maintenance of a cap on new bareboat licences will result, over time, in the activation of all 323 vessels.

CAIRNS AREA	At Present	Sustainable Limits	At Transition to New Regime	Future Controls
Sites	200 <sup>1</sup>	260+ <sup>2</sup>	260+ <sup>2</sup>	Few new sites, licences not limited
Regular Rovers	400 <sup>3</sup>	250 <sup>3</sup>	250 <sup>3</sup>	Capped
Itinerant Rovers		40 at any one time	150+ <sup>4</sup>	Licences not limited
Gamefishing		Self-limiting	60+	No limit on endorsements

WHITSUNDAY AREA	At Present	Sustainable Limits	At Transition to New Regime	Future Controls
Sites	16 <sup>1</sup>	16+ <sup>2</sup>	16+ <sup>2</sup>	Few new sites, licences not limited
Regular Rovers	430	c.130	130	Capped
Itinerant Rovers		20 at any one time	300+	Licences not limited
Bareboats	323 <sup>5</sup>	220-323 <sup>6</sup>	323	Capped

1. Excludes beach-hire, ancillary moorings or service moorings at resorts and harbours
2. Some sites have no managed limit on the number of moorings or pontoons, subject to physical installation feasibility.
3. Includes both site-specific and roving operations with a history of use of the Area. Most current site-specific operations include regular rover permissions and would be grandfathered for both types of licences under current proposals.
4. Managed by booking requirements.
5. Only around 200 of these are active at present.
6. Sustainable limit being determined.

As already indicated, the Committee broadly approves of the new management regime. We believe that it will give the Authority much more effective control over cumulative impacts, while giving tourism operators greater certainty and flexibility. The Cairns and Whitsunday Plans of Management should be viewed as substantial steps towards introducing a new management approach throughout the Marine Park.

*R.4 The Committee recommends that, subject to the amendments we have recommended elsewhere in this report, the planning and management regime proposed for the Cairns and Whitsunday areas should be adopted throughout the Marine Park. This does not mean that Plans of Management need to be implemented in more remote and less intensively-used regions, but that they should be looked upon as a template for future implementation if and when this level of detailed management is required.*



In the course of this Review, we have expressed a number of concerns about the present design of the Plans of Management. These have been communicated to the staff within the Authority charged with developing the new management regime, and they have indicated that a number of these recommendations are being adopted in the work of redrafting which is still going on. Since we have not had the benefit of viewing any of the redrafted Plans of Management, we have included here all of our recommendations for reform.

The approach taken to the Plans of Management has been to package in each document all of the changes envisaged in the shift to the new scheme of management. This includes some quite specific provisions for handling existing user entitlements and for the allocation of defined but currently unused sites. Each of the Plans of Management also contains detailed provisions on the different categories of new licences and the privileges and responsibilities attached to each one. In our view, each of these three elements - sites and settings, licences and existing user entitlements - should be kept separate.

To embody transitional issues in a Plan of Management runs the risk of having them overly influence important features of the planning system. Moreover, avoiding this in the Plans of Management for the Cairns and Whitsunday areas will create a more generic instrument capable of being used as a template for future use elsewhere in the Park.

Since the new licensing system will be Reef-wide in its application, and not merely confined to a particular area, generic provisions relating to the design and operation of licences would be better dealt with through regulations or otherwise, and applied generally across the Marine Park.

*R.5 We recommend that provisions dealing with the generic design of licences and the treatment of existing user entitlements be removed from the Plans of Management and be dealt with through regulations and policy statements. Plans of Management should be confined to the management of settings and sustainable limits on use for particular areas, sectors, localities, locations and sites.*

The draft Plans of Management, as presently constructed, are more complicated than they need to be. Some of the key spatial settings are exercised as part of the licence process, rather than through the spatial planning section of the Plans of Management. For example, in the Cairns Area it is presently proposed that there will be 8 sectors, localities and locations which will be subject to limitations on vessel numbers. These entitlements will be allocated through a booking system on a first-come, first-served basis. In principle, it is difficult to see how the limit of 1 vessel per day at the Snapper Island Reef in the Offshore Port Douglas Sector differs from the four hour per day limitation on the public moorings at the Cod Hole. If there are differences, they are not such as to warrant their regulation separately through licences. Moreover, if generic provisions concerning licences are to be removed from the Plans of Management, then some alternative mechanism will be required to deal with these sensitive or heavily used sites.

*R.6 In redesigning the Plans of Management to remove generic provisions relating to the operation of licences, it will be necessary to retain in the Plans provisions to protect sensitive sites through some alternative form of the spatial controls.*

*R.7 While the Plans of Management specify how many moorings and pontoons can be located in specific localities, it will be necessary for the Authority to maintain a register of these moorings and pontoons and the current holders of the licences associated with them.*

### **3.7 Managing Impacts**

In developing a new and more effective regulatory instrument, it is important for the Authority not to lose sight of its primary policy objective. In our view, the primary focus in regulating the marine tourism industry should be on managing impacts (including the threat of impacts) on the conservation, cultural and heritage and presentation values of the Reef. The importance of this is evident in the debate about latency (discussed later), where some have confused ends and means. Because of the traditional reliance on individual permits with only weak control of cumulative impacts, controlling the number of day-visits to the Reef was in danger of becoming an end in itself. The aim is not to manage the number of people visiting the Reef *per se*, but to effectively manage the potential impacts they might have on the previously-mentioned values. Depending on the circumstances, this may require managing numbers of people, vessels or activities.

It is important, then, for the Authority to choose management instruments which are most cost-effective in regulating impacts. Given that the primary objective is to manage ecological impacts, then instruments which focus directly on the number of anchoring events over sensitive sea bed, and the number of persons walking on sensitive cays and islands, might offer better targeted control and thus more efficient regulation.

The danger with management instruments which are too crude or indirect in their application is that they may result in unintended impacts on the environment. For example, tight controls over person-visits could discriminate against large, pontoon-based operations and favour small operations with a greater propensity for anchoring. Equally, targeting just vessel numbers in an attempt to limit anchor damage could involve significant costs, and detract from presentation values, in discouraging pontoon and mooring-based operations which cause no anchor damage. On the other hand, highly-specified instruments determined case-by-case can involve high administrative costs and result in a loss of flexibility.

The draft Plans of Management which have been available to the Committee (ie those for Cairns and the Whitsundays) reflect an awareness of these principles. Nevertheless, the Authority needs to be sensitive to changes in technology, industry management practices and community values to ensure

that the instruments of management are the most effective for managing impacts.

A review of available data and research results on behalf of the Committee indicates that the majority of marine tourism operations generally have a low and very localised impact on the ecological values (see Part 2 of the Report). However, there are some activities, such as anchoring in the Whitsundays and visits to sensitive cays (such as Michaelmas Cay), which require - and are receiving - closer attention. A number of the environmentalists contacted in the course of this review supported this view, although they also expressed the concern that increased commercial exploitation of the region would place greater pressure on land-based infrastructure, with indirect consequences for the health of the Reef.

Managing impact well depends on the availability of reliable information about cause and effect. A precautionary approach is justified in managing use which is potentially damaging to the Reef, particularly those forms of use which are capable of causing irreversible damage. It is important, however, that this not become an excuse for inadequately resourcing information-gathering and research on impacts. To fail to invest adequately in research of this kind would be to unnecessarily constrain the growth of low impact tourism.

The Committee strongly endorses the current shift to the spatially-based management of cumulative impacts, but we believe it is important that governments recognise that this will require an up-front investment in additional research.

We have been reassured by Authority staff on a number of occasions in the course of this review that the use-settings in the draft Plans of Management have been based on a professional assessment of the carrying capacity of each *site, location, sector or area*. We have not had access to the research on which these assessments have been made, and the Authority is relying in large part on its day-to-day experience over many years in managing tourism operators, as well as the results of extensive consultations with users of the Reef and other stakeholders.

*R.8 We consider it to be important that the Authority document the decision-making processes which have led to site allocations and other restrictions on access to areas and locations.*

### **3.8 Amenity**

Amenity is becoming an issue at sites and locations where growth in use is concentrated. This has raised questions about the role of the Authority in regulating amenity, with concerns on the part of industry that government officials may try to regulate in some detail, the kind of tourism experience which visitors to the Reef wish to have.

The Committee accepts that the Authority needs to be involved in determining the 'big picture' settings through Zoning Plans and Plans of Management. The justification for its involvement in amenity issues at this level is the need to plan for a diversity of use opportunities (including tourism experiences) across the Reef. On the other hand, it was agreed that the Authority should not try to second-guess the market in the kinds of tourism experiences being offered. There must be room for innovation and competition between private sector operators and it is important that amenity not become an excuse for operators to introduce unnecessary rigidities into the system, thereby protecting themselves from competition.

After some discussion the Committee found it difficult to determine where, between these two extremes, the appropriate balance lay, and we did not feel that we had available to us the expertise or the detailed information necessary to make such a determination.

*R.9 Nevertheless, a strong view was expressed that when the Authority does intervene in amenity issues, it should do so at the planning stage and only after consultation with community and industry as a whole. It was not appropriate for the Authority to make ad hoc interventions in individual licensing approvals in order to manage amenity. (However, in the process of assessing the impacts of major new projects and developments, the Authority will need to consider amenity issues as part of its statutory impact assessment procedures.)*

### **3.9 Generic Licences**

Currently, the draft Plans of Management establish sites and settings with limits to use which cater for a range of user types and use intensities. However, there remain many situations where, having done this, there is still a need to control the diversity, frequency and intensity of visits by tourism operators. This is needed, for example, to manage coral damage due to anchoring or the numbers of people visiting sensitive breeding sites. It can also be used to maintain desired amenity levels in particular locations.

Under current proposals, licences are to be used to achieve this by specifying where the holder can go and with what frequency, subject to the settings laid down in the Plans of Management. As previously mentioned, the Committee believes that the generic provisions governing licences should be separated out of the Plans of Management and established under regulation. At the same time, however, spatial limitations should be removed from the licences and laid down in the spatial settings contained in the Plans of Management.

Although the proposed licensing system would be a major improvement on the existing system of individual permits, there is still a considerable amount of complexity built into the licences. In the interests of flexibility and administrative simplicity, the Committee considers that the Authority should strive to make the new licences as generic as possible.

Economists use the term 'fungibility' to describe rights or permissions which are specified in such a way as to maximise their divisibility and conversion from one form of use to another. The importance of fungibility is that it increases the scope for flexibility and choice, enabling the holders of rights or permissions to exchange their entitlements, to 'mix and match', thereby facilitating innovation and better revealing consumer preferences.

Many of the permits issued under the existing management regime have been specified in such detail that they are hardly convertible (or fungible) at all. Reef managers within the Authority consider that the proposed licensing system is being designed to produce permissions which are as convertible as possible, consistent with administrative efficiency. Of course, if the concept of fungibility were to be carried to the extreme, it could greatly increase administration and transaction costs.

The Committee has not had access to a detailed cost-benefit analysis which would enable it to determine just how convertible these licences should be, nevertheless, we are concerned that the new permissions, as currently proposed, may not be sufficiently generic to produce an optimal level of choice and flexibility.

In particular, we are concerned that site-specific entitlements are separated from access rights. In the interests of greater flexibility and choice, it would be desirable if the Authority were to issue separate licences for the right to operate on the Reef, and the right to use a specific *site*. This would allow site licences to be more easily exchanged and for operators to innovate with different tourism packages. The Authority has signalled some willingness to adopt this proposal, with all tourism operators holding a licence to operate on the Reef, and those with entitlements to specific *sites* holding an additional licence specifying these use rights.

*R.10 The Committee recommends that the Authority issue two separate kinds of licence: (i) a general right to operate on the Reef which would apply to all tourism operators; and (ii) entitlements to specific sites.*

Both of these permissions will be transferable under the proposed new scheme of management. The number of regular roving licences and the number of bareboat licences will be capped, so that anyone wanting to enter these sectors will have to purchase an entitlement from an existing licence holder. Likewise, the licences to use specific *sites* will be exclusive (although such an entitlement could be shared between several users, as at the Cod Hole), and they, too, will be transferable. While, in a strict legal sense, a licensee will not have sole use of a *site*, the effect will be the same.

It is to be noted that in most *locations*, the Authority will provide public moorings or anchoring *sites* which can be accessed by recreational users, or by roving operators. At the Cod Hole, for example, in addition to the two moorings operated by the Cod Hole and Ribbon Reef Operators Association, the Authority provides two public moorings free of charge. It is entirely possible that public sites of this kind could be provided (say) by an association of roving or bareboat

operators on a timeshare basis, but the Authority feels, no doubt with considerable justification, that public opinion demands that some *sites* be made freely available for casual use.

### **3.10 Existing User Entitlements**

The task of upgrading the management regime in the Marine Park is not being done on a clean sheet. Procedures, permissions and users are already in place, and in some cases have been so for many years. Managing existing user entitlements is therefore part of the task faced by Marine Park managers in reforming regulatory systems.

As we have argued elsewhere in this report, there are good reasons for keeping transitional issues separate from the design of a new management regime. Eventually the two elements have to be brought together, but existing use is a transitional issue, whereas the licences and the Plans of Management designed for the Cairns and Whitsunday areas must serve as a template for the management of the whole Marine Park. It would be most unfortunate if the quality of Marine Park management were compromised because of the failure to distinguish short-term transitional issues in two areas.

Insofar as it is a real issue, latency is also best considered in the context of existing user entitlements. In particular, that form of latency associated with unused permits is a transitional issue, which we believe requires explicit consideration at the changeover to the new licensing system. The broader issue of latency is discussed in greater detail below.

The Committee is strongly of the view that operators with active commercial businesses based on existing permissions should have those entitlements transferred across to the new system. Given the investments which these individuals and companies have made in the development of marine tourism on the Reef, it would be grossly unfair if these permissions were not carried across. It was also be inefficient over the long term, since it would send negative signals to potential future investors about the level of 'sovereign risk' in the Australian economy.

Conversely, it is clear that if all of the 'sleeping' permits were to be activated as a result of the transition to the new management regime, that it could place an unacceptable burden on parts of the Reef. There are some external indications that the Authority has intervened in the old system at an opportune moment. The imposition of moratoria on the issuance of new permits in the Cairns and Whitsunday Sections has resulted in limited trading at fairly modest prices. This would tend to suggest that, given present market conditions, existing rights have not been grossly oversubscribed.

Marine Park managers have advised us that they are comfortable with the level of commitment in site-specific operations. As regards roving licences, the new regime seeks to manage this by creating a class of 'itinerant rovers' with limited rights of access to the Reef (up to a maximum of 50 days per area per year).

This will result in some permit holders having entitlements well beyond their desired level of use, but the capacity for this surplus capacity to be activated is small given the prohibition on exchanging any portion of these unused days in this permits.

The Committee did not have the resources or the expertise to second-guess the recommendations of Marine Park managers as to the sustainable limits of the various *areas* and *locations*, but from our discussions with those involved in the design of the new management regime, we are concerned that they may be pursuing too much compromise in their solutions. Tougher decisions up-front will be required.

In general, the Committee favoured an approach whereby the Authority faced up to these transitional problems at the outset, rather than compromising a good policy outcome over the longer term. There is a strong sentiment in the industry, and this was to some extent reflected on the Committee, that a principle of 'use it or lose it' should apply. From our discussions, there would appear to be three broad options available to the Authority in managing this unused capacity:

- to grandfather all or some portion of existing permissions, but to recognise them as exceptions to the new scheme of management. Grandfathering could include conditions on non-transferability to reduce the likelihood of the exception continuing indefinitely;
- to remove, uniformly and across the board, all permit capacity that has not been used for a period of, say, two years prior to the introduction of the new management scheme. This would require some form of independent panel to review difficult cases (such as a long-time operator who had taken his/her vessel overseas on charter, or one who had suffered prolonged illness). It is to be noted that the Tourism Advisory Group (refer Section 4) is working on a proposal of this kind; and/or
- to introduce a financial charge of some kind on unused permissions which would act as a disincentive on non-use. This could be levied as a percentage of the number of licensed passengers, with the cost offset against the Environmental Management Charge, so that active operators would face no additional imposts.

The Committee considered these various options and was unable to reach agreement as to a preferred recommendation. Indeed, it may well be that some combination of these instruments would be most appropriate. There is some concern within parts of the tourism industry at the proposal to introduce a financial charge on unused permits. While this might have the effect of encouraging some holders of unused permits to surrender their permits voluntarily, there was also concern at the possible impact on small operators and on those who have legitimately acquired additional permits for future development of their businesses. On the other hand, we would not wish to understate the effort which would be required to manage the retirement of unused permits via the second option.

*R.11 We also believe that an effort should be made to reduce unused capacity prior to moving to the new system. A number of options for doing this have been*



*identified, in addition to the ones already built into the new management regime. The Committee is strongly of the view that existing users who have been operating actively should have their entitlements (or some equivalent) transferred across to the new system of licences.*

### **3.11 Allocation of New Sites**

The means of allocating new sites for tourism activities in the Marine Park has been the subject of numerous reviews and reports both by the Authority and other agencies in recent years. It is a contentious issue because of the sensitivities surrounding resource allocation where the resource is a highly valued and protected natural area, and because it inevitably leads to a debate about whether users should pay for the privilege of using such valuable national assets.

Although consideration has been given in the past by the Authority to approaches involving concessions and resource rents, as well as allocation through tenders, ballots and auctions, none of these options has been well received by the tourism industry and they have not gained political support. In their submissions to the Review, environmentalists were divided on the question of using tenders to allocate new sites. Some were in favour of such an approach, while others were concerned that it would make the Authority dependent on the expansion of the tourism industry for its financial viability.

For the purposes of this Review, the issue of new site allocation has been considered in the context of the proposed new management system. The question arises in two somewhat different contexts:

- the allocation of sites which have been identified within the Plans of Management but which have no historic operator; and
- the allocation of as yet unidentified sites outside of the Plans of Management.

The two differ primarily in the extent to which the Authority as the manager of the Marine Park would need to assess the likely impacts of any such proposals. In the case of sites identified in Plans of Management, it is expected that the application will be for a pontoon or mooring facility, the environmental consequences of which will be reasonably well understood. Outside of Plans of Management, it is likely that a more comprehensive impact assessment would be required.

After consideration of a number of options for allocating new sites, the Committee favoured a continuation of the current system of 'first-come, first-served'. This would result in the release of new sites being determined by industry demand, rather than being artificially stimulated by auctions conducted by the Authority. There was also concern that auctions of this kind could stimulate speculation, a development which it was thought would be undesirable.

In our view, the argument in favour of such an approach outside of the *areas* regulated by Plans of Management is overwhelming. The Authority should not be involved in trying to second-guess the tourism market in developing new sites well ahead of demand. A 'first-come, first-served' approach encourages innovation and protects the intellectual property of those who do come up with innovative tourism products. It also enables the Authority to exercise greater scrutiny of the environmental suitability of particular proposals.

Within those *areas* regulated by Plans of Management, the issue is more difficult. Of course, once a *location* is declared to be fully utilised, then new operators will have to obtain entry by negotiating some arrangement with an existing licence holder. But where unallocated *sites* remain, the question is upon what basis they will be released. In our view, the 'first-come, first-served' approach is still to be preferred, since it leaves the Authority with greater control over environmental issues.

In the course of our discussion of these issues, concern was expressed at the need to exclude speculators from the process, particularly in a climate where licences to use particular *sites* can be traded. A number of options are available for the management of this issue, and again, the Committee was not able to reach agreement on a preferred solution:

- the 'first-come, first-served' approach could be supplemented by a requirement that licence holders provide the Authority with evidence that they are undertaking developmental work on the commercial opportunity associated with the *site*. In this respect, the licence in its initial stages would be similar to an exploration permit in the mining industry, which has similar conditions. While the definition, monitoring and policing of use and non-use would pose some difficulties, these need not be insurmountable (as the example of the exploration licence suggests).
- the imposition of a financial charge on unused permissions which would act as a disincentive on non-use. As already noted above, this could be levied as a percentage of the number of licensed passengers, with the cost offset against the Environmental Management Charge, so that active operators would face no additional imposts.

*R. 12 It is recommended that the Authority formalise its policies on the allocation of new sites. The Committee is not in favour of auctioning entitlements, and we are of the view that the fundamental allocative principle should be first-come, first-served (subject to environmental suitability). We recognise that some qualifications to this may apply where the first applicant is not easily determined, where there are multiple historic users of a site, and so on.*

### **3.12 Security and Tenure**

The tourism industry has argued consistently over some years that the duration and the security of permits are important to convince financial institutions to underwrite the investments which are required for commercially-viable and

environmentally-sensitive operations. Tenure in this context refers to the length of the privilege or permission granted by the Authority and not to some concept of outright ownership of the asset. Criticism of tenure is often based on the misconception that it involves private ownership of what is, in fact, a public asset.

Initially, Marine Park tourism permits were issued for 1 year, but over time they have been increased to 3, and then 6 years duration. Technically, permits are not renewed. Operations reapply on expiry of their permit and are reassessed before being issued with a new permit. In practice, permits have been routinely 'renewed', sometimes with additional or changed conditions. Indeed, so much has this become a matter of routine that senior managers in the Authority take the view that a refusal to renew without the strongest of reasons would result in a legal challenge, and it is expected that, without the clearest evidence of a substantial breach, the permit holder would succeed.

Much of the existing investment by marine tourism operators has taken place under annual permitting arrangements, suggesting that a short tenure period is not of itself inconsistent with significant investment and growth in marine tourism. However, much of this investment took place in a climate where concern about the renewal of permits was also low. This combination of short tenure and certainty of renewal created a high level of security. We have received anecdotal evidence that permits issued by the Authority in the past have been viewed commercially as 'bankable' assets, suggesting that confidence in the continuity of the process swamped any uncertainty associated with relatively short formal tenure length.

In the course of our review, there have been suggestions by industry that, despite the move to 6 year permits, there has been a decline in security because of a perception that government policy has become less predictable. Frequent changes in environmental regulation and the sudden introduction of the Environmental Management Charge have been cited as examples. This increase in perceived 'sovereign risk' may operate as a disincentive to invest in the context of short tenure periods.

Length of tenure is not an end in itself. What the industry most needs in order to underwrite long-term investment is certainty, and this is influenced by a number of factors, including:

- length of tenure;
- the perceived likelihood of changes to relevant government policies;
- the certainty with which a permission will be renewed by the regulator;
- whether the permission contains an option to renew;
- the circumstances under which a permission would be revoked for breach of conditions; and
- the likelihood of new information, changed conditions or changed community demands causing the rules to be changed in a way which causes disadvantage to existing permission holders.

Industry and the Authority both agree that managers must retain the right to revoke or not renew a licence, or to subject it to more burdensome conditions if

new information comes to light which makes adjustment to these settings the most appropriate response. The industry is concerned, however, that there be clearly established rules or procedures which will be adopted in such circumstances. There is also an expectation on the part of industry that any such revocation or non-renewal, as long as it was not prompted by any misconduct on the part of the operator, would be compensated by the Authority by the allocation of a new site in the same area.

There would appear to be three circumstances in which the Authority might find it necessary to amend or to revoke a permission to operate:

- (i) new information, changed community demands or changes which affect the condition of the Reef and requiring remedial responses;
- (ii) natural disasters, such as cyclone damage, which affect operations; and/or
- (iii) environmentally harmful or otherwise irresponsible behaviour on the part of the operator.

*R.13 The Committee recommends that the Authority review all of its current policies and practices governing alteration of the terms and conditions of licences, including revocations and non-renewals. This should be undertaken in order to ensure that the Authority has the legal power necessary to protect the environmental, cultural and presentation values of the Reef.*

*R.14 The Authority also needs to state clearly its policy on renewal in circumstances where none of the afore-mentioned circumstances has intervened.*

*R.15 The Committee also recommends that the Authority specify in writing the conditions under which a licence might be amended, revoked or not renewed, and the procedures which would be adopted in a review of this kind.*

*R.16 In the event of there being a need to amend, revoke or not renew a licence for some reason other than irresponsible behaviour on the part of the operator, the Committee favours the current policy of working with operators to find alternative sites rather than 'buying back' entitlements.*

*R.17 Where it is necessary for a licence to be revoked or not renewed because of irresponsible behaviour on the part of an operator, the Committee recommends that the Authority immediately withdraw the entitlement to operate, but that operators be allowed to transfer their licences to other operators approved by the Authority.*

In our view, this will give even the irresponsible operator an ongoing incentive to protect the quality of the environment. Moreover, if it knows that it is not entirely destroying an operator's investment, we believe that the Authority will be more prepared to intervene at an early stage.

If the rules and processes governing renewal, alteration and revocation can be improved and clearly articulated, then the Committee would support a longer period of tenure. It is to be noted that indigenous groups have generally

expressed opposition to lease periods longer than 10 years, and while permissions to use the Reef are not leases, it is to be expected that a similar approach would be adopted in this case. It has been suggested to us that if there were commercially-sound reasons for a longer period of tenure, then indigenous groups might be prepared to consider such a suggestion. Whilst acknowledging that *de facto* use rights may have arisen over time, environmental groups have also indicated their opposition to the formalisation of such entitlements and any increase in tenure.

The Committee believes that an increase in security will expand the time horizon of tourism operators and increase their incentives to act in the long term interests of the environment. We are concerned at reports from industry, which we believe to have been genuinely expressed, that in spite of an increase in the period of tenure to six years, tourism operators and the financial institutions which support them perceive a decline in security. Since, in the present circumstances, it is difficult to see how the Authority could provide a more predictable regime of environmental regulation, we believe that the Authority needs to look to a longer period of tenure.

*R.18 After some discussion, the Committee agreed to recommend a period of 15 years for tourism licences, based on the time horizons used by financial institutions. This should be subject to the completion of the review of policies referred to in Recommendation 13.*

*R.19 The Committee also recommends that, prior to any move to extend licence tenure, steps be taken to remove or to substantially weaken as many as possible of those permits held by operators which have not been used for some years. Having said this, we would also not want this process to unduly delay the shift to a more stable management regime.*

### **3.13 Latency**

Latency emerged some years ago as a measure of the gap between the annual number of *permitted* tourism person-visits to the Marine Park and the *actual* number of person-visits as determined through analysis of data from Environmental Management Charge returns.

Analysis of 1995 EMC returns indicated that actual visitor-days across the Marine Park accounted for only 1.7 million of a possible 11.7 million permitted visitor-days. The size of the 'management gap' seemed alarmingly high in an environment where there had been growing concerns with threats to ecological, cultural, heritage and social values of the Marine Park and World Heritage Area flowing from increased use.

Moreover, at a time when the length of permit tenure was being increased (from 3 years to 6 years) and transferability of permits was emerging, the possibility existed that some of this latent capacity could be activated and, unintentionally, greater strain could be placed on the Marine Park in areas of intensive use.

Since concerns about latent capacity first emerged there has been a concerted effort by the Authority to better understand the nature of so-called latency and the management strategies necessary to deal with it. It is now recognised that much of what was originally identified as latent capacity cannot be reactivated and that a management regime which regulates cumulative impacts will better address the issue. In short, latency (as that term has been used in recent years) is a very poor indicator of cumulative impacts and the choice of the term 'latency' was, in retrospect, inaccurate.

The EMC data measure the gap between *permitted* and *utilised* access, rather than the difference between *useable* and *utilised* access. Many of the unused but theoretically authorised visitor-days are not capable of being activated since they are required for the effective operation of marine tourism on the Reef. There is a range of technical, climatic and commercial aspects of marine tourism operations which mean that 100 percent of permitted capacity will never be used.

Part of the difficulty with the existing concept of latency lies in its reliance on measuring the number of visitor-days to the Reef. At present, permits are applied to sites and vessels and allocate permissible person-visits for that site and that vessel *at any one time*. If, because of market or weather conditions or for reasons of good management, not all of these person-visits are capable of being taken up at one time, then an apparent latency problem is seen to emerge.

- Demand for reef visits inevitably fluctuates with seasonal and market conditions. Thus a vessel may be permitted to take 100 people out to a site, but if on any one day there are only 50 passengers available, or if conditions are too rough to go out at all, then the remaining visitor days are lost. They cannot be carried forward or exchanged.
- Commercial incentives will require 'lumpy' investment in vessel capacity which will necessarily involve periods when capacity utilisation is well below 100 percent. This is not unique to marine tourism. Investment in hotels, roads and office equipment (for example) also shares this characteristic.
- Some operators maintain extra capacity in the form of additional vessels with appropriate permits, as insurance against vessel problems.
- Some operators have also maintained 'back-up sites' for use when the weather conditions favour this. This is prudent management, but it increases so-called latency, even though these operators are physically incapable of using all of these visitor days simultaneously.

From the data presently available, it is difficult to assess how much of this so-called latency is a phantom and how much of it is real. It is recognised, however, that in the absence of changes to the management regime, some of the authorised but presently unused capacity could be transferred or otherwise activated, resulting in new pressures on the Reef. This, and not the kind of operational latency referred to above, was the concern of the Authority.

The shift to a management regime which seeks to manage *impacts*, as opposed to person-visits, will do much to ameliorate this problem. As tourism continued to grow, traditional management, with its emphasis on individual permits and lacking controls on cumulative impacts, would have manifest serious limitations in this regard.

The draft Plans of Management introduce a range of controls suited to dealing with cumulative impacts and this suggests that most aspects of latency can be managed to eliminate the more serious impacts such as anchor damage and pressure from visitors on sensitive breeding sites. There may be concerns about pressures on particular sites, but these are issues concerning the level of particular settings and controls at those sites, rather than a reflection of inherent latency issues.

A somewhat different concern about latency has emerged in the large number of permits held by individuals or operators which have apparently not been used for extended periods and, in some cases, have never been used. If, in the shift to a system of more flexible and transferable user entitlements, these permits were to acquire commercial value and thereby become activated, this could result in new pressures on parts of the Reef in future. In this case, the latency lies in the number of unused permits, rather than the number of authorised visitor-days.

As we have already observed, the officials in the Authority who have been charged with developing the new management regime are satisfied that they will be able to manage this surplus effort, partly through the capacity which exists on the Reef, and partly through a weakening of entitlements in their conversion from permits to licences. We have expressed our concerns about this approach elsewhere in the report and recommended a course of action. It is to be noted, however, that this is a transitional issue and can best be managed by firm decisions at that point in time.

### **3.14 The Use of Non-Regulatory Instruments**

The geographically-dispersed nature of marine tourism, and the fact that many of its potential impacts are not readily visible, means that heavy reliance on the monitoring and enforcement of use-rules by government officials will be largely ineffective and/or prohibitively expensive. For some years, the Authority has recognised these limitations and has looked to the self-interest of tourism operators to complement its regulatory instruments. Non-regulatory instruments include environmental best practice guidelines, industry codes of practice, education and training, accreditation and co-management.

Tourism on the Great Barrier Reef provides one of those relatively rare opportunities where the incentives facing tourism operators are closely aligned with those of the regulator. Both parties have a strong interest in protecting the values of the World Heritage Area - the Authority because of its statutory



obligations and tourism operators because of the role which World Heritage status plays in attracting visitors to the Reef.

More specifically, long-term tourism operators who are regular users of a specific site have a strong incentive to protect their rights and privileges through self-monitoring and self-policing to ensure that the asset remains in a state which will attract tourists and maximise commercial returns over the medium to long-term. This suggests the need for operators to function within a regulatory environment which is stable and predictable, where they have an expectation of benefiting over the longer-term from responsible management practices in the short-term. Threats to Reef values are to be expected where an individual user does not have to face up to the longer term consequences of any damage done (for example, the hirers of bareboats who are typically inexperienced users with no long-term commitment to the industry), and where each individual user has little personal control over outcomes because the number of operators using a site is large.

One way in which tourism operators are able to manage this latter class of threat is through the formation of clubs, associations, cooperatives and the like. In this way, self-constraint, self-monitoring and self-policing might evolve in sensitive sites subject to commercial pressure. There are examples of this already happening at different sites on the Reef, one of the most notable being the Cod Hole and Ribbon Reef Operators Association formed in the early 1990s. (Associations also offer a means of managing recreational users of the Reef.)

#### **Cod Hole Site Management**

Prior to the formation of this association, the Cod Hole was dominated by individual anchorings which limited scope for coordination of use and maximising utilisation. There may also have been some incentive for operators to stake claims in order to keep future options open. The result of voluntarily associating was that permits for moorings are now held collectively. The Cod Hole and Ribbon Reef Operators Association (CHARROA) operates the site and membership charges are related to the use made by individual members. Provided that these voluntary arrangements have no greater impact on the key values determined at the time of association, the manager in the Authority have no role in how the Association determines access rights or allocates the intensity and frequency of use.

Codes of Practice typically address anchoring and shared mooring arrangements, environmental education and training as well as conservation practices such as reef walking, fish feeding and interaction with marine mammals. They are being used for site-based management at the Cod Hole and on Michaelmas Cay, but they are also being developed for whole sections of the Reef (for example, a draft Code of Practice exists for the Cairns Section). They also exist for various industry sectors, such as game fishing and charter operators. While Codes of Practice have utility at the level of the individual place

or sectoral association, we recognise that there is also a need for higher-level coordination to avoid unnecessary inconsistencies and to share ideas.

The Whitsunday Bare Boat Operators Association are currently working with the Authority in developing standards to serve as the basis for accreditation. Accreditation is also being considered by industry as a means of coping with sensitive sites such as cays where bird nesting and breeding takes place. In this case, it would involve the training and accreditation of individual guides who would work with tour operators.

The marine tourism industry has also developed voluntary projects to assist in monitoring the state of the reef, not dissimilar to the Landcare groups which have been established across Australia in recent years. For example, a monitoring project entitled 'Eye on the Reef' has recently been tested by the industry under the umbrella of the Reef Tourism 2005 Project. This involves employees of tour operators in the systematic collection of data on specific coral health indicators. Information of this kind is of value not only to managers within the Authority, but it also gives tour operators an interest in the long-term health of that part of the Reef with which they are mostly closely associated.

#### 4. Consultative Mechanisms

Consultation between the Great Barrier Reef Marine Park Authority and the marine tourism industry sits within a broader consultative framework which recognises that there is a wide range of stakeholders with an interest in the protection, use and management of the Marine Park and the World Heritage Area. The Authority has established consultative processes with Aboriginal and Torres Strait Islander peoples, conservation interests, fishing interests, as well as regional communities, as represented through the Regional Marine Resource Advisory Committees (RMRACs).

At the highest level, the *Great Barrier Reef Consultative Committee*, established by legislation, is an independent advisory body for both the Minister and the Authority. The committee represents a wide cross-section of interests from both the public and private sectors, including tourism, fishing, science, conservation, local government and Aboriginal communities. It consists of members appointed by the Minister for a three year term and a member of the Authority, appointed by the Authority for a one year term. Although the Consultative Committee typically consists of two or three members with expertise in tourism, it has no formal linkages with the broader marine tourism industry.

The *Regional Marine Resources Advisory Committees* (RMRACs) arose out of an extensive round of consultation conducted by the Authority with commercial tourism operators and recreational user groups in 1992 and 1993. At present, 11 RMRACs are operating in regional centres along the Queensland coastline. Their structures vary to suit local needs, but generally they consist of representatives from the tourism industry, recreational and commercial fishing sectors, conservation interests, Aboriginal and Torres Strait Islander interests, local government and other specific interests (such as recreational diving). The RMRACs are not regarded by the tourism industry as an important opportunity for consultation with the Authority.

In accordance with recommendations from a 1996 workshop on tourism use management and consultation, the Authority established a non-statutory, competency-based *Tourism Advisory Group* (TAG) in January 1997. This group was established as an interim body to provide advice at a strategic level on a range of issues, including the implementation of the proposed new management regime.

Initial feedback from both the Authority and industry members sitting on the TAG is that the group is working well. From an Authority perspective, the TAG provides practical advice at an early stage of policy development on important issues such as the implementation of the proposed new planning and licensing system. From an industry perspective, the establishment of the TAG provides greater transparency and accountability and gives the leaders of the marine tourism industry a forum where they can table and discuss industry concerns.

It must be stressed, however, that the TAG is not formally a means whereby the Authority can consult with the industry at large. As it is presently structured, TAG

does not represent the industry, either on a sectoral or on a regional basis. Although most industry members of the TAG are also leaders in their own sectoral organisations, the Authority and TAG members considered that the Group would function most effectively if members were involved as independent experts, without any obligations to lobby for the particular concerns of individual operators or industry associations.

For the present, we consider this to be appropriate. In an industry which has historically been highly fragmented, TAG is acting as a useful forum for bringing industry leaders together in a constructive dialogue with the Authority. There has been some discussion amongst some industry organisations about the possibility of merger, and to those involved on the TAG, this is seen as a positive outcome of the establishment of this forum. In our view, the Tourism Advisory Group should be confirmed as a permanent forum in its present structure. We recognise that over time, the TAG could well evolve in a different kind of institution.

*R.20 The Committee recommends that role of the Tourism Advisory Group be formalised as a permanent non-statutory, competency-based forum.*

With the growing use of non-regulatory instruments such as codes of practice and place-based associations, the Authority will need to enhance its capacity for consultation, if not co-management, at the local level. This will involve a different range of consultative skills from those required for dealing with the TAG or the Consultative Committee, but they will also be important for the successful implementation of the proposed new scheme of management.

A proposal surfaced at the second meeting of the Steering Committee for the appointment of a tourism industry representative to the Marine Park Authority itself. At its subsequent meeting, the Tourism Advisory Group also discussed this proposal and passed the following motion: 'The Tourism Advisory Group recommends that marine tourism be represented on the Marine Park Authority.' The Committee has declined to make a recommendation on this issue. This proposal, if it were implemented, would either change the role of the Marine Park Authority from a supervisory board into an advisory board, or it would radically change the relationship of the tourism industry, from user into shareholder. Either way, in the opinion of a majority of members, this question was beyond the terms of reference of the Review.

# **REVIEW OF THE MARINE TOURISM INDUSTRY IN THE GREAT BARRIER REEF WORLD HERITAGE AREA**

## **Part 2 SUPPORTING INFORMATION**

*Prepared by the Tourism Review Steering Committee  
with assistance from the  
Great Barrier Reef Marine Park Authority  
and the Office of National Tourism*

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# REVIEW OF THE MARINE TOURISM INDUSTRY WITHIN THE GREAT BARRIER REEF WORLD HERITAGE AREA

## PART 2 : SUPPORTING INFORMATION

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# Section One:

# INTRODUCTION

## 1.0 INTRODUCTION

### 1.1 Great Barrier Reef Marine Park and World Heritage Area

A significant issue in any discussion of the Great Barrier Reef Marine Park is its vast size. Covering an area of around 354,000 km<sup>2</sup> seaward of the low water mark on the Queensland coast, it is approximately one-and-a-half times the size of the United Kingdom. It is the largest system of coral reefs in the world and one of the most complex, intricate and biologically diverse ecosystems on earth.

The Great Barrier Reef has developed over the past 8000 years on a limestone foundation. The Reef in its present form is largely a result of limestone accretion of minute skeletons of single celled animals called polyps and a cementation process associated with coralline algae. Extending some 2500 km along the Queensland coast, from just north of Bundaberg to the tip of Cape York Peninsula (Figure 1), the region consists of some 2900 individual reefs and about 900 islands, two-thirds of which are continental or high islands, the remainder being coral cays.

The reef and surrounding waters support a rich diversity of plants and animals specially adapted to its complex physical environment. The species composition varies across the reef shelf because of microclimates created by the interaction of siltation, availability of nutrients, light intensity, ocean currents, and many other factors. Living on the limestone foundations are 400 species of hard and soft coral as well as numerous other animals, including sponges, sea urchins, fish, birds and turtles. Whales are also frequent visitors to the marine park.

In addition to its biophysical attributes the Great Barrier Reef is highly valued for its social, cultural and aesthetic attributes. A vast area of spectacular scenery, great physical beauty and a source of wonder for millions of visitors each year, it also holds enormous cultural, historical and economic significance for the indigenous people who have traditionally lived within Reef areas.

The Great Barrier Reef Marine Park is the world's largest Marine Protected Area, a World Heritage Area of great international significance, a major tourist attraction and significant commercial and recreational fishery, and an Australian icon. Tourism is easily the largest industry within the Area, generating over \$1 billion annually, with this activity concentrated in the Cairns and Whitsunday regions. By comparison, commercial fishing is about one quarter the economic size of tourism. There are strong interdependencies between reef tourism and tourism on the adjacent mainland.

The challenge for the Authority, as the lead agency managing the Marine Park and the Great Barrier Reef World Heritage Area, is increasingly to reconcile the demands by a range of user groups for "reasonable use" of the Reef resource, while meeting its primary conservation goal. With only 4.7% of the Reef in strictly protected zones (Zoning Plan "pink" and "green" areas)<sup>1</sup> there are increasing efforts in Marine Park planning to ensure greater inclusion of "representative areas" as part of setting an acceptable balance between uses.

Among the list of issues adding to the complexity of the Authority's management role are a number of key concerns:

- the increased responsibility that comes with the broadened charter of World Heritage Area management and the growing pressure from some sections of the community to see a higher level of regulation put in place to protect World Heritage values;
- in hand with the above, increased pressure to identify, protect and manage social, cultural and aesthetic values, including the need to maintain a broad range of "settings" or levels of use across the Reef;
- increased obligations to, and greater recognition of, indigenous social, cultural and economic interests, including issues such as land and sea rights; displacement from

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<sup>1</sup> Equivalent to IUCN Category 1 and 2 Protected Areas.

traditional areas by other park users, ie tourism operations; and the need to develop co-management arrangements where appropriate;

- the fact that a number of exploitative uses of the Marine Park provide considerable economic and other benefits to both the region and the nation;
- an increasingly vocal and active community which demands well resourced access to consultative planning processes; and
- the fact that these increased pressures are occurring in an era of decreasing regulation and a growing expectation by government for agencies such as the Authority to meet their obligations within limited budgets.

## **1.2 The Case for a Changed Approach to Managing Great Barrier Reef Marine Tourism Use**

The Great Barrier Reef Marine Park was established at a time of low tourism use, and unsophisticated monohull vessel technology. Visitor numbers were low enough not to pose too great a management concern in comparison, for example, with the potential threats of extractive industries such as fishing and mining. Concern about the impacts of tourism on the Great Barrier Reef were certainly included amongst the range of potential threats which needed to be controlled and managed when conservationists were lobbying for its protection in the early 1960's and through until its declaration as a Marine Park in 1975. Nevertheless, tourism as an industry barely existed at that time, and assessment of marine tourism uses was easily managed on a case-by-case basis.

Due to its diverse nature, tourism was not explicitly listed as an activity in Great Barrier Reef Marine Park Zoning Plans which were the primary management tool enabled by the Great Barrier Reef Marine Park Act (1975). Consequently, Zoning Plans allow for tourism operations in most zones, subject to "permission" being received from the Great Barrier Reef Marine Park Authority (GBRMPA). To date, Program and Facilities permits have been used as the principal means of regulating Great Barrier Reef Marine Park tourism activities.

With the extensive growth in the marine tourism industry over the past two decades, this established planning and management framework has been under review. More rigorous assessment and a growing number of permit applications has meant the administrative demands of the current system have grown dramatically. At the same time, the inability of the case-by-case assessment approach to adequately take into account cumulative ecological, social and cultural effects, has demanded a rethink. The current, narrowly focussed system is no longer considered the most effective or efficient method of managing marine park tourism. The introduction in 1992 of an Environmental Management Charge (EMC) on marine tourism operations also created greater pressure for better "client service" from the Authority.

The outcome of this period of review (particularly between 1992-1996) has been a clear recognition both within the Authority and the marine tourism industry that radical changes are required to implement a more effective and efficient planning and management regime.

However, the historical burden of the existing system cannot be ignored. During the last few years both the Authority and industry have been involved in lengthy and detailed negotiation and consultation to address a number of critical issues needing to be resolved in the transition to any new system.

Among the first of the key issues to be identified by the Authority was the high degree of uncertainty created by an apparently massive gap between permitted tourism use and actual tourism use. This gap has been termed "latent capacity". Analysis undertaken by Authority staff of the 1994-95 EMC returns data indicated that permitted use of some 11.5 million visitor-days had been granted, while actual use was in the vicinity of 1.5 million for the year. A similar result was found for the 1995-96 returns.

Around the same time, concerns were growing about the economic and social impacts of overcrowding in high tourism use locations and evidence was also emerging that anchor damage was becoming a major problem in localised areas, particularly in association with

bareboat operations<sup>2</sup> in the Whitsunday's area. Intensive use in some areas was also impacting on species such as whales, dugong, turtles and seabirds, a number of which are considered endangered or vulnerable.

Initially the Authority proposed policy level responses such as site plans and mooring and anchoring plans in the highest use locations. Further analysis by the Authority revealed marine park tourism use to be very spatially concentrated, with more than 90% of actual visitor days occurring in less than 4% of the Marine Park. Around 30% of this activity was focussed in the Whitsunday's and most of the balance focussed in the Cairns-Port Douglas region. Only around 5% was spread throughout the remainder of the Marine Park.<sup>3</sup>

It was also realised at this time that the industry itself was very concentrated in that approximately 5% of permitted operators accounted for around 70% of visitor-days in 1995. Analysis showed further that 16% of permitted operators accounted for 90% of visitor-days in the same year. The ten largest operators carried 50% of visitor-days between them in 1995.<sup>4</sup> By now the Authority had determined that latent capacity could be separated into two distinct components; spare capacity required for efficient tourism operations; and true latent capacity associated with a large number of unused permits<sup>5</sup>. It is this second type of latency which has been of major concern to the Authority.

This better understanding of the structure of the marine tourism industry provided the Authority with much greater direction in its development of a more responsive planning and management system. It was decided the most urgent need was to develop more detailed plans to address the high-use sections off Cairns and in the Whitsunday's. In 1995, the Marine Park legislation was amended to enable the development of statutory Plans of Management to meet a range of objectives outlined in the Act. This amendment also requires such planning defer to the "precautionary principle" of ecologically sustainable development and also takes account of Australia's obligations to protect the World Heritage values of the area.

Importantly, this amendment to the GBRMP Act also provided for the setting in place of moratoria on the granting of new tourism permits for a period of 12 months<sup>6</sup> in order to allow a "breathing space" in which to prepare the Plans of Management. Given the concerns about over-crowding and latent capacity issues, there was widespread support for the imposition of moratoria (in mid-1995) over, first, Cairns and then the Whitsunday's sections, while Plans of Management were under development by the Authority in consultation with stakeholder interests.

The Authority's Permit Review in 1994 had already proposed the need for a "radical transformation" of the permit system to provide for a much more stream-lined approvals process, based largely on the notion of generic licenses. Under the proposed system, much of the detail currently attached to individual permits would be removed and would be replaced by incorporating spatial regulations into Plans of Management. In this way, the management of impacts at sites and locations throughout the Marine Park would be able to be generally applied and cumulative effects could be more easily addressed.

At this stage a number of significant transitional issues, such as the method of allocating sites for regular tourist operations and how to address the latent capacity tied up in permits not being actively used, were yet to be considered in detail by the Authority. Some resource allocation options which were being discussed, such as concession systems and resource rents, were creating a climate of uncertainty and concern within the Marine Park tourism industry, although no definite options were being formally considered by the Authority at this time.

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<sup>2</sup> "Bareboats" refers to power and sail boats made available for private charter by individuals who are not required to demonstrate a high level of maritime experience.

<sup>3</sup> Unpublished data, GBRMPA.

<sup>4</sup> See Section 2 for most recent figures on industry structure.

<sup>5</sup> Authority analysis of EMC data suggests as much as 47% of all permitted vessels in 1995-96 turned in a "nil" return which would appear to indicate they did not operate at all in that time.

<sup>6</sup> From public announcement of Intention to Prepare a Plan of Management

In keeping with the sentiments of the *25 Year Strategic Plan*, the concept had been developing within the Authority of an approach which would address many marine tourism use and recreational use issues through a "reef-wide" strategic planning and management approach. This proposed *Reef-Wide Tourism Use Management Strategy* would build upon the existing Zoning Plans but provide more explicit spatially-based regulation through the application of statutory Management Plans over intensively used sections of the Reef. It would aim to reduce the current level of operator-specific regulation through the introduction of a more generic licensing system and through much greater reliance on industry self-regulation. Outside of the Plans of Management, Reef-wide tourism strategies would be established to provide forward planning direction to future tourism expansion and to ensure a diversity of experience is available across the World Heritage Area.

### 1.3 Background to the Marine Tourism Review

By mid-1995, with much of this proposed new system still in the conceptual stage, some sectors of the tourism industry and government tourism agencies considered there was a need for the proposed reef-wide planning and management system to be more widely discussed and assessed. In particular, the likely impacts of the proposed system on the tourism industry needed to be understood. The Authority also saw the need for a process which would allow for the underlying policy framework of the new approach to marine tourism management to be more formally adopted.

In 1995, the operators and marine tourism industry associations of the Cairns Section of the Marine Park initiated the *Reef Tourism 2005 Project* to enable industry to fully participate in this process and to research and trial ways to ensure ongoing industry participation in future management planning for sustainable use of the Marine Park.

A submission to the 21st Meeting of the Great Barrier Reef Ministerial Council from Authority staff, supported by the then Commonwealth Department of Tourism, recommended that an investigation was needed to establish the cause-and-effect relationships between the proposed system elements and various aspects of the industry such as viability, access rights, site allocation and latent capacity. In short, a "reality check" was required to ensure the proposed system would be the best approach both for the industry and for the Authority in carrying out its obligations as the "guardian" of the Reef. Formalisation of consultative mechanisms between the industry and GBRMPA was seen as crucial to the success of any new planning and management system.

That meeting of the Ministerial Council endorsed the proposal for a review of marine tourism use management in the Great Barrier Reef World Heritage Area. At that stage (December 1995), it was envisaged that the review would take approximately 18 months, cover a wide range of topics and involve all major stakeholders from both government and industry.

The Review was subsequently postponed for a number of reasons, primarily the change of Federal government in March 1996, and hence a change in membership of the Great Barrier Reef Ministerial Council; and the announcement in the Federal Budget in August 1996 of a proposed rise in the Environmental Management Charge. As well, following the Ministerial Council decision, some sectors of industry advised the Authority that they considered such a review was not necessary.

In May 1996, Authority staff met with a wide range of representatives from the marine tourism industry and Queensland and Commonwealth Government agencies to discuss industry representation for a full range of activities associated with Marine Park management. The industry at that stage, advised that an industry-wide reference group was urgently required to provide advice on an "as needed" basis. There was also support for a Marine Tourism Review to consider possible effects on industry of the proposed new system.

Therefore, despite the delays, the original rationale for the Review was still considered valid. The 22nd Great Barrier Reef Ministerial Council, meeting in November 1996, again

endorsed the proposal for a Marine Tourism Review, to be undertaken with some urgency and to report by June 1997.

By this stage, some aspects of the proposed new system were considerably advanced in their development within the Authority. Indeed the Authority was coming under increasing pressure to finalise the Plans of Management which had been around in one form or another for over two years. It was, by now, becoming critical to further progress that the Authority have access to a broad cross-section of the Marine Park tourism industry in order to develop the detail of critical elements of the new approach.

Therefore, while the Marine Tourism Review was directed to report on long-term consultative mechanisms between industry and the Authority, in recognition of *Reef Tourism 2005* and other industry initiatives, a Tourism Advisory Group (refer Section 5) was established in early 1997, as an interim arrangement, to provide the day-to-day advice previously recognised as critical to the planning process.<sup>7</sup>

#### **1.4 Scope of the Review**

In recognition of the much reduced time-frame for completion of the Review, and also acknowledging the large body of information already available on a number of the Terms of Reference (Appendix A), the Review's main focus of attention was the examination of the following matters:

- *the latent capacity that exists in the number of tourism permits that have been issued to date and options for managing latency;*
- *security of permits held by industry;*
- *mechanisms for resource allocation in both the long and short term; and*
- *consultative mechanisms with the industry.*

In focussing on these key economic matters the Steering Committee was required to provide advice as to whether the proposed tourism management strategy and licensing system is robust, practicable to implement and capable of meeting management and industry needs into the foreseeable future.

The Review was to be conducted in accordance with the *Great Barrier Reef Marine Park Act 1975* (refer Section 4 of this report) and be consistent with the need to ensure protection, conservation and presentation of the Great Barrier Reef World Heritage Area. It was also to draw upon relevant outcomes of the *Brown Review of the Great Barrier Reef Marine Park Authority* (due to report in March 1997) and to pay particular attention to work conducted under the *Reef Tourism 2005 Project*.

The focus of the Review was to be marine tourism operations, including air and water-borne activities, and only including infrastructure requiring permission under the jurisdiction of the Marine Park. The Review was not intended to address the management or environmental impacts of the tourism components of developments in the adjacent coastal strip (such as resorts and marinas). Neither was the Review to deal with the matters of the existing Environmental Management Charge or the introduction of a Visitors Charge which arose out of proposals in the 1996-97 Federal Budget as these issues are being dealt with through a separate process.

#### **1.5 Conduct of the Review**

The Marine Tourism Review was jointly funded by the Great Barrier Reef Marine Park Authority and the Department of Industry, Science and Tourism through the Office of National Tourism. The Review was overseen by a Steering Committee consisting of an independent chairperson, representatives of government, and persons with specific expertise in marine tourism (3 members), financial aspects (1 member), indigenous interests

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<sup>7</sup> The TAG was funded to operate until the end of the 1996-97 financial year, during which time it met on four occasions to discuss issues relating to the implementation of the proposed new planning and management system.

(1 member) and conservation issues (1 member). Day to day work was undertaken by a Working Group consisting of officers from the Office of National Tourism, the Queensland Department of Tourism, Small Business and Industry and the Great Barrier Reef Marine Park Authority.

Immediately following the November 1996 Ministerial Council meeting nominees were invited to participate in the Steering Committee. Steering Committee members subsequently appointed were:

- Mr Gary L. Sturgess (Chairperson)
- Mr Mike Burgess
- Mr Ed Green
- Mr Brian Rogers/Mr Graham Lee
- Mr Robert Maher A.M.
- Ms Evelyn Scott
- Ms Wendy Morris
- Mr Bob Speirs (Queensland Department of the Environment)
- Mr David Mazitelli (Department of Industry, Science and Tourism)
- Mr Mark Peters (Queensland Department of Tourism, Small Business and Industry)
- Dr Ian McPhail (GBRMPA)

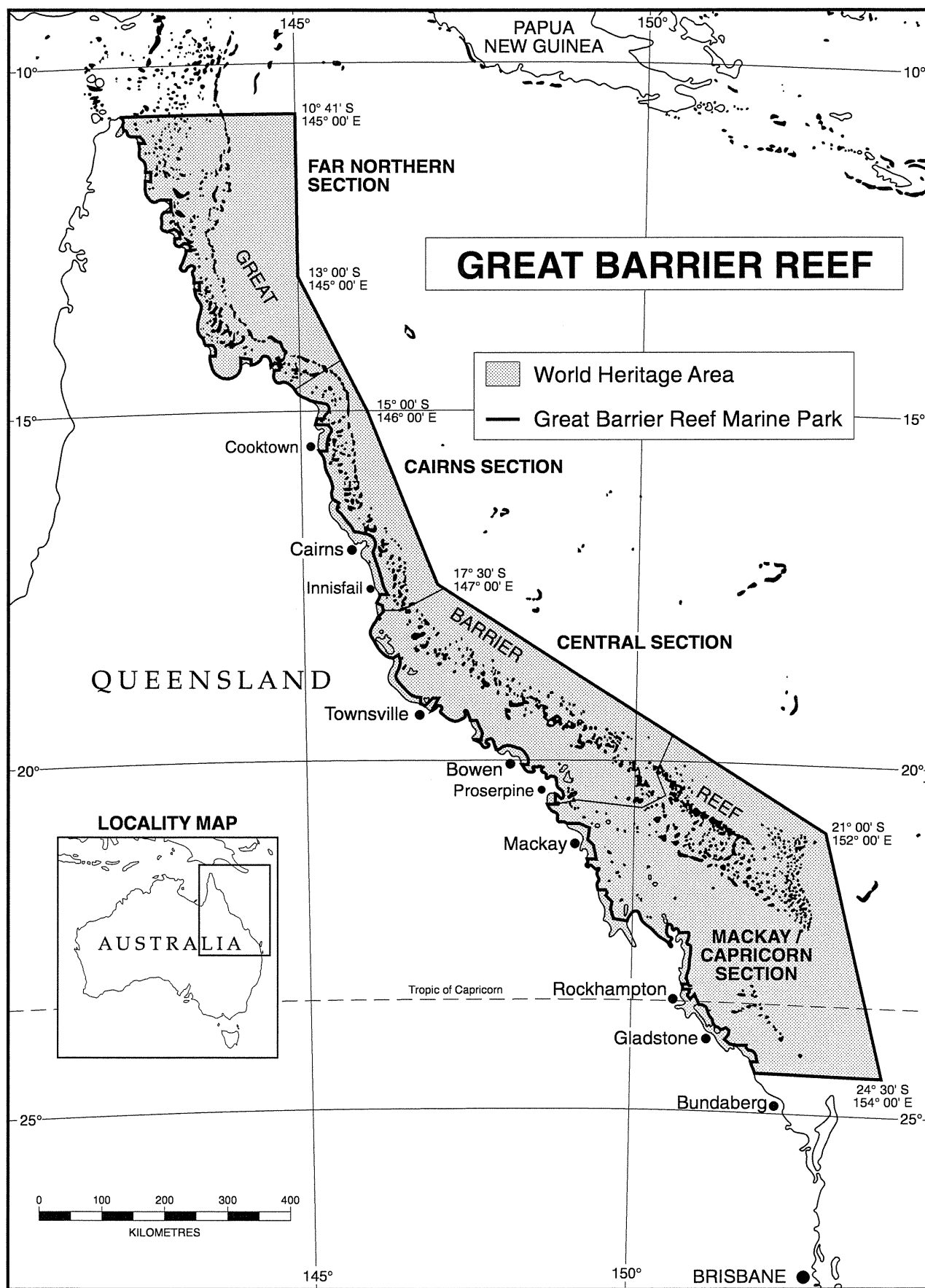
The Marine Tourism Review Steering Committee met for the first time in Brisbane on 18 February 1997 and subsequently on two further occasions; 5 May 1997 and 29 May 1997. Following the first meeting of the Steering Committee, Mr Brian Rogers was represented by Mr Graham Lee, the chairperson of the Tourism Advisory Group. Unfortunately, Ms Wendy Morris, who had been appointed as a person with expertise in conservation matters, was also obliged to resign part way through the Review for reasons related to her work. Some consultation with conservation groups was undertaken directly by the Chairperson and indirectly through GBRMPA. Detailed economic research was undertaken on behalf of the Review by ACIL Economics and Policy Pty Ltd of Canberra and Stratos Consulting Pty Ltd of Sydney.

The Review Working Group met on a number of additional occasions throughout the course of the Review. Throughout the Review there was a high degree of interaction between the Steering Committee and the Tourism Advisory Group which had sought input on a number of matters relevant to the Review.

The Report from the *Brown Review* was not available for consideration by the Review Steering Committee, however some subsidiary reports relating to implementation of the proposed new permit/licence system were able to be considered. Consideration of the *Reef Tourism 2005* project was primarily undertaken by the consultants and through input by relevant Steering Committee members.

The Report of the Marine Tourism Review is presented in two parts:

- Part 1 - Key Findings and Recommendations  
*This section addresses the main issues as outlined above and relates primarily to Terms of Reference 4 (economic factors) and 5 (consultative mechanisms).*
- Part 2 - Supporting Information  
*This volume, which includes the contextual and background information required to be reviewed and considered by the Review Steering Committee in addressing the key economic issues and the matter of consultative mechanisms.*



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**FIGURE 1**



## Section Two:

# TOURISM OPERATIONS

## **2. TOURISM**

### **2.1 National Tourism Trends**

#### **2.1.1 Tourism and the Economy**

Tourism is one of the world's biggest and fastest growing industries and an important and growing part of the Australian economy. Australia is well placed geographically to benefit from increased tourism flows in the Asian Pacific region and offers a unique and appealing tourism product for many potential Asian travellers.

In 1993-94, total expenditure attributable to tourism in Australia is estimated to have been \$47 billion, representing 6.6 per cent of GDP. Tourism is a relatively labour intensive industry, employing over 500,000 people, or 6.9 per cent of the workforce. In 1996, tourism generated \$16.1 billion in export earnings, which is equivalent to 14.5 per cent of Australia's total exports and 68 per cent of all services exports.

#### **2.1.2 Inbound Tourism**

Over the last ten years, inbound tourism to Australia increased at an average annual rate of 11 per cent and in 1996, the number of overseas visitors to Australia reached a record 4.16 million.

Japan is the largest individual source market for visitors to Australia, accounting for 21 per cent of all visitors. Australia's second largest market is New Zealand, followed by the UK and Ireland, and the United States. The number of visitors to Australia from Other Asia (Asia excluding Japan) has more than doubled in the past three years, with growth from countries such as Korea and Taiwan increasing at extraordinary rates.

The average duration of stay for inbound visitors is 23 nights although this varies widely from an average of 9 nights for Japanese visitors to over 40 for Europeans and Canadians.

By the year 2005, over 8.8 million people a year are expected to visit Australia. Fastest growth is expected from the Asian market (other than Japan). This will have implications for infrastructure development, including the provision of facilities required by this market, the development of language and communication skills and the management of goods and services required by visitors. Visitors from each of the Asian markets have quite different preferences and characteristics, and one of the major challenges for the Australian tourism industry is to understand these differences and provide the mix of experiences that will be demanded.

#### **2.1.3 Domestic tourism**

The domestic market accounts for around 75 per cent of visitor nights and visitor expenditure but this segment of the market is growing very slowly. Australians took 60 million trips within their own country in 1995, involving 252 million nights away from home. The average duration of trip, at just over 4 nights, is much shorter than for inbound tourism.

Around 36 per cent of domestic trips are for holiday or pleasure travel. 30 per cent of trips are to visit friends or relatives, and 18 per cent are for business, conferences or seminars. By far the most popular form of transport used on domestic trips is private vehicles, accounting for more than three quarters of trips.

Holiday travellers generally take longer trips than other travellers while business travellers usually stay for a shorter period of time and are less likely to participate in recreational activities and tours. 86 per cent of visitor nights for those who travel primarily to visit friends and relatives are spent with those friends and relatives although these travellers do provide a market for shopping and operators of tours, attractions and restaurants.

#### **2.1.4 Financial Investment**

Tourism investment in Australia has in the past been strongly linked to international investment trends as it has been very dependent on direct foreign investment. When the Japanese speculative wave of the late 1980s halted at the same time that Australia went into recession there was a marked effect on tourism investment, as the industry accounted for 16 per cent of foreign direct investment. In 1988-89 Japanese investment made up 70 per cent of all tourism proposals and was dominant in Cairns where it created a large oversupply of tourist accommodation, which in many instances was loss making.

Despite the sudden impact of this withdrawal of funds Cairns Sydney and the Gold Coast have remained as significant areas for foreign investment in tourism. The scale of foreign investment has been large relative to total investments with tourism projects comprising a large proportion of all property investments in the area.

Even though there is currently a cyclical upturn in the Australian investment property market due to a number of factors including a better balance of supply and demand and a positive outlook, tourism remains largely unsupported by equity from domestic institutions. A Macquarie Bank study released in 1995 found that specialists viewed tourism as carrying a moderate to high level of risk. There was also a preference for well established assets over those which were newly developed or in the development phase. The level of perceived risk in tourism stemmed from a number of issues including poor profitability, market immaturity and volatility, inequitable owner operator relationships and poor confidence in industry information.

#### **2.1.5 Tourism Industry Standards**

The long term commercial viability of the tourism industry depends on it being capable of sustaining high standards of service and delivering a high quality experiences. In particular, since Australia is a long haul international destination, it must compete on the quality of the product and value for money rather than price alone. Workforce training and professional industry standards are key elements in the development of an internationally competitive and sustainable tourism industry.

The importance of training differs between tourism industry sectors and from business to business. Small tourism businesses are least likely to implement formal or structured training and employers in the tourism industry appear to place more emphasis on experience and on-the-job training than on formal qualifications. Spending on training and the premium paid to trained people are lower in tourism than in other industries.

The tourism industry has a high labour turnover. There is evidence that much of the turnover is created by people seeking alternative employment within the industry, in order to obtain better career opportunities and higher wages. In this sense, high turnover may not represent a loss of skill and experience from the industry.

In response to concerns about workforce standards and training the tourism industry has developed several training programs. Existing courses include the Australian Guide Qualification Program and the AussieHost Customer Service Training Program.

Codes of conduct are drawn up by industries as a voluntary guide to how they should operate. Industry finds voluntary codes to be an attractive alternative to enforced regulation, and often proposes these codes to forestall regulation. Tourism Council Australia, the Ecotourism Association of Australia and the United States based The Ecotourism Society have all developed environmental codes of conduct.

The development of accreditation schemes by the tourism industry is a major step towards addressing the need for nationally recognised tourism industry standards. Accreditation provides industry and consumers with an assurance that a tourism product or service will meet certain standards across Australia as well as within States. It also incorporates the principles of quality improvement and business management.

An accreditation program has been developed by the Victorian Tourism Operators Association and has now been refined and introduced nationally under the auspices of the Australian Tourism Operators Association. The Ecotourism Association of Australia and the Australian Tourism Operators Association have jointly developed a National Ecotourism Accreditation Program. Other schemes in operation in Australia include Tourism Council Australia Western Australian Branch's quality assurance program and the Australian Quality Award framework.

The need for a marine tourism specific training and accreditation scheme has been identified by research undertaken by the *reef Tourism 2005* project. This is presently being negotiated with the Authority, relevant government departments and training providers.

## 2.2 Tourism to the Great Barrier Reef Economic Region

### 2.2.1 Tourism in Queensland

Tourism is one of Queensland's largest industries, contributing 7.1 per cent of Queensland's Gross State Product (GSP), generating 9.5 per cent or \$7.7 billion in expenditure in 1995 and providing 8.5 per cent of the workforce or 122,000 jobs. As an exporter it is second to coal in the Queensland economy and well ahead of wheat, wool and sugar.

The contribution of tourism to Queensland GSP has been estimated as doubling during the decade from 1984 to 1994 and net sales of Queensland tourism service increased at an annual average of 19 per cent. In 1993-94 the export income from interstate and international tourism was almost equal, reflecting the rapid growth of international tourism to Queensland.

**TABLE 2.1: Great Barrier Reef Economic Region Estimated Population**

Sub Division	Selected Centre	1991 pop	1996 pop	91-96 annual growth (%)
<b>Fitzroy</b>		168,375	184,445	1.8
	Rockhampton	63,598	68,320	1.4
	Gladstone	33,447	37,717	2.4
<b>Mackay</b>		110,301	121,074	1.9
	Mackay	54,454	61,595	2.5
	Whitsunday Shire	11,429	13,398	3.2
<b>Northern</b>		182,581	197,547	1.6
	T'ville-Thuringowa	114,063	126,703	2.1
<b>Far North</b>		181,399	205,955	2.6
	Cairns	86,294	104,305	3.9
	Douglas Shire	7,716	9,189	3.6
<b>Regional Total</b>		642,656	709,021	2.0
<b>Queensland</b>		2,960,951	3,354,675	2.5
<b>% of Qld</b>		21.70	21.14	
<b>Australia</b>		16,849,496	18,289,142	1.7
<b>% of Aust</b>		3.81	3.88	

Source: Australian Bureau of Statistics

### 2.2.2 The Regional Economy

For the purposes of this report the Great Barrier Reef economic region consists of four ABS statistical divisions (see Figure 2) and has a population of over 700,000 people, most of whom live on or near the coast in provincial cities. (Table 2.1) Even though its growth rate has been slightly below the Queensland average between 1991 and 1996, this has mainly

been the result of a declining population in rural areas. The fastest growth areas in the region, with annual average population increases well above the Queensland average, are the tourist centres of Cairns, Douglas Shire and Whitsunday Shire. Population projections indicate that this trend of growth by the cities and large towns and a declining or stable rural population (mainly away from the coast) will continue.

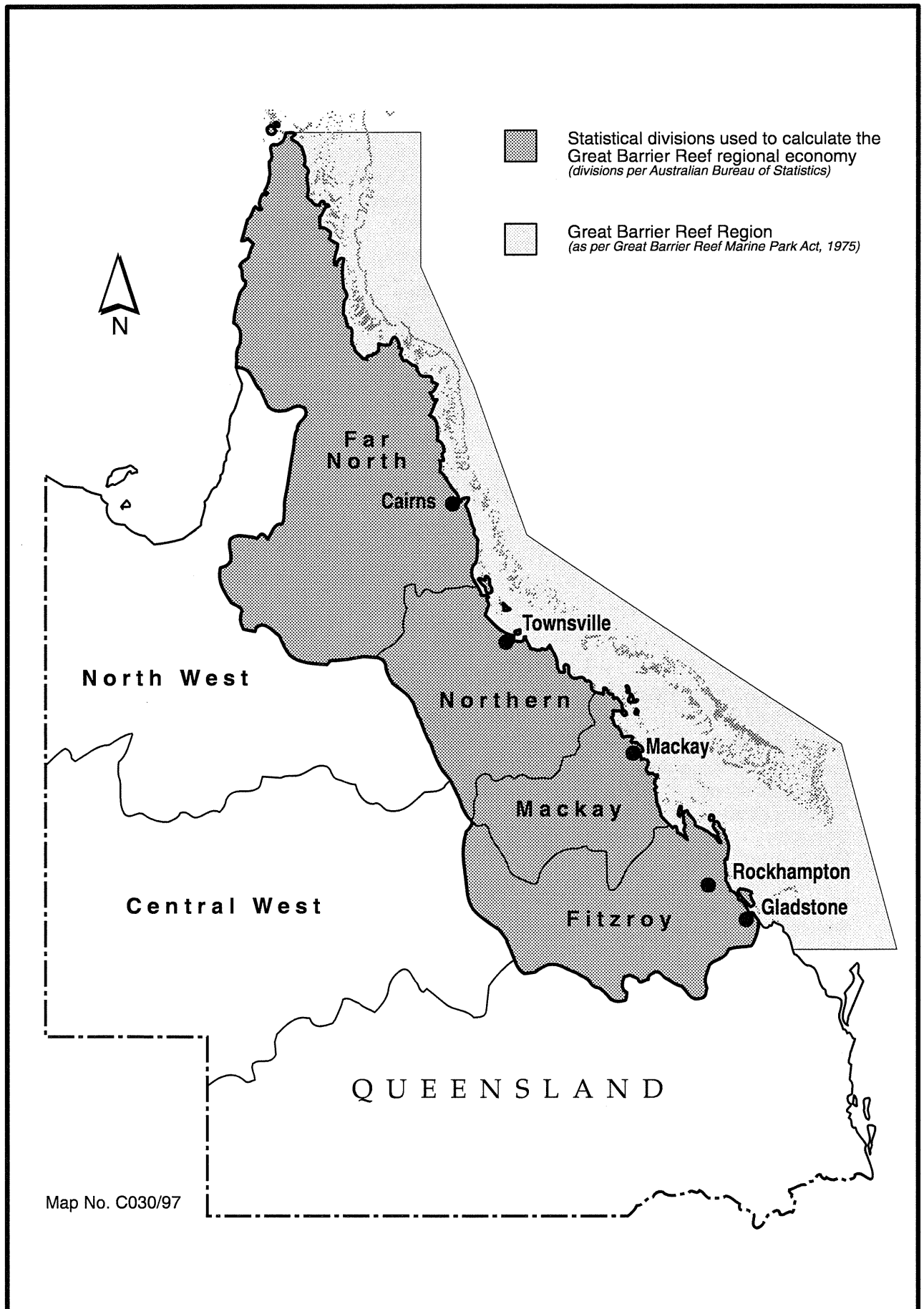
In the period from 1986-87 to 1990-91, the Gross Regional Product (GRP) of the Far North region grew at a faster rate than any other Queensland region. The economy of the Northern region also performed strongly, however, there was no growth in the Fitzroy region and a slight decline for the Mackay region. The make up of the Great Barrier Reef regional economy in 1990-91 is shown in Table 2.2.

Raw GRP figures can be a little misleading when trying to understand the structure of an economy. For example Public Administration, Trade and Transport are essentially service industries which gain their value from activities generated by the surrounding population. In this regard agriculture, with less than 10% of GRP is actually a major foundation of the economy. It has strong linkages with some manufacturing and transport activity, particularly through sugarcane, which is the major crop in the region, accounting for 80% of State production of the product

**TABLE 2.2 - Great Barrier Reef Gross Regional Product and Tourism Expenditure 1990-91**

Industry Sector	Region (% of total GRP)				Total
	Far North	Northern	Mackay	Fitzroy	
Agriculture	9	9	7	8	8
Mining	8	8	35	20	17
Manufacturing	11	12	7	10	11
Electricity, Gas and Water	2	4	2	6	3
Construction	8	7	6	8	7
Wholesale & Retail Trade	13	14	10	11	12
Transport Storage and Communications	10	10	8	9	9
Finance Property and Business Services	6	5	4	4	5
Public Admin, Defence and Community Services.	15	18	8	11	13
Recreational, personal and other Services	8	5	5	4	5
Ownership of Dwellings	9	8	6	7	8
General Government	2	3	1	2	2
<b>GRP at Current Market Prices (\$m)</b>	<b>3,622</b>	<b>3,904</b>	<b>2,902</b>	<b>3,968</b>	<b>14,394</b>
<b>Tourism Expenditure 1990/91 (\$m)</b>	<b>836</b>	<b>313</b>	<b>235</b>	<b>326</b>	<b>1709</b>
International Tourism Expenditure (\$m)	414	68	33	39	552
Interstate Tourism Expenditure (\$m)	178	84	60	93	414
Intrastate Tourism Expenditure (\$m)	245	162	143	194	743
<b>Tourism Exp. as % of total GRP</b>	<b>23</b>	<b>8</b>	<b>8</b>	<b>8</b>	<b>12</b>
International % of total GRP	11	2	1	1	4
Interstate % of total GRP	5	2	2	2	3
Intrastate % of total GRP	7	4	5	5	5

Source: Queensland Statisticians Office



**FIGURE 2**

Mining is the major export earner for the region, but aside from some flow-ons to transport and some processing facilities in places such as Townsville and Gladstone, the sizeable contribution it makes to regional GRP does not go directly into the region. Because most of the produce is exported the benefits mainly accrue to Australia as an economic unit, although some benefits are returned to the region of origin.

The employment structure of the region is outlined in Table 2.3. Mining is a capital intensive industry with a relatively small proportion of the regional workforce compared with wholesale and retail trade which earns 12% of the GBR regional GRP but employs 19% of the workforce. The regional differences of note are in manufacturing, which employs a lower percentage of people in the Far North region than in the other regions, and accommodation, cafes and restaurants which employs a higher percentage in the Far North region.

**TABLE 2.3 - Great Barrier Reef Economic Region Labour Force 1996**

Category	Region (% of total regional labour force)#			Total
	Far North	North/NW	Mackay/Fitz CWest	
Agriculture, Forestry and Fishing	6	8	6	7
Mining	5	5	3	4
Manufacturing	7	11	12	10
Electricity, Gas and Water*	1	1	2	1
Construction	11	8	10	10
Wholesale and Retail Trade	17	21	19	19
Accommodation, Cafes and Restaurants	8	5	5	6
Transport, Storage and Communication Services*	9	6	11	9
Finance, Property and business services*	10	8	9	9
Public administration and defence	6	7	5	6
Education, health and community services	15	15	15	15
Recreational, personal and other services*	5	5	5	5
<b>Total Labour Force (number)</b>	<b>110,000</b>	<b>97,000</b>	<b>140,300</b>	<b>347,300</b>
Unemployment Rate (%)	6.8	8.2	9.4	8.3
Participation Rate (%)	72.0	65.8	63.7	66.7

# For workforce Statistics the Northern Division and the North West Division are combined and the Mackay, Fitzroy and Central West Regions are combined.

\* These categories have a sampling error higher than 25% and are therefore not reliable for practical purposes

Source: Australian Bureau of Statistics

Tourism is not an identified industry according to international accountancy principles which are used to produce Gross Domestic Product and GRP. As an industry tourism is defined by consumption, rather than by the production of goods and services. As a result the elements that make up the tourism industry are actually contained in a number of other industries. This can range from large parts of the accommodation, recreation and transportation sectors of the economy through areas such as agriculture and manufacturing where there are moderate linkages, to areas with little involvement in tourism such as mining. As a result there is no easy way to estimate the value of the industry. However it is known that its

major impact is in the non government service sector which is a major component of the regional economy and the leading employer.

An estimate using a methodology compatible with that used by the Bureau of Tourism Research to calculate tourism's national contribution to the economy suggests that tourism contributes slightly less than 10% of GRP in the Far North region and 4.8% of GRP in the Northern region. However a 1996 study from Coopers and Lybrand for *Reef Tourism 2005* estimated that in 1994 the estimated contribution of tourism to the Far North Queensland economy was 25% of GRP.

Another method of understanding the economic value of the industry can be through raw expenditure figures, although these sit outside GRP figures and do not take into account any flow on effects to the industries or cost outflows associated with providing tourism services. Regions such as Far North Queensland can suffer a substantial leakage of tourism returns because of a high dependency on imports.

Expenditure figures for the Great Barrier Reef economic region indicate that in 1990/91 tourism expenditure was \$1.7 billion which is equivalent to 12% of total GRP. The contribution to the different regions was equivalent to 23% of GRP in Far North Queensland and 8% in the other sub regions. The equivalent of 11% of GRP in the Far North is due to international visitors but this part of the market is less than 2% of GRP in the other regions. Additional information on visitor expenditure is contained in Table 2.2.

Any significant increase in the value of tourism as a proportion of GRP in the regional economy is dependent on large increases in international visitation, due to the low growth levels of domestic tourism. The already high base level of expenditure in Far North Queensland and infrastructure and access limitations in other regions make rapid increases unlikely in the immediate future.

The use of regional expenditure in comparison with GRP figures, which apply on a regional basis, tends to mask the fact that tourism, (particularly from interstate and overseas), is particularly significant to centres such as Cairns, Port Douglas and Airlie Beach. In these areas a relatively small change in visitor expenditure is likely to have a noticeable effect on the economy.

Another factor to consider when assessing the impact of tourism is that although the industry may not have high financial impacts it is relatively labour intensive. A comparatively small tourism venture in financial terms can have a more significant impact on jobs growth.

### **2.2.3 Visitors to the Great Barrier Reef Economic Region**

The domestic market accounts for just under half of visitor nights in the Great Barrier Reef economic region. (Table 2.4) This is equivalent to 10 per cent of total Australian domestic visitor nights. The relative proportions of international, interstate and intrastate visitor nights are virtually the same as the national average.

The region accounts for around 5% of Australian domestic trips with the visitors from country Queensland consistently making up more than two thirds of the total number of visitors. (Table 2.5) This reflects the size of the region, its distance from the rest of Australia and the importance of the various regional centres within it. Not surprisingly the average duration of stay is around 4 nights for Queensland country visitors which is a quarter of the average for visitors from other states.

Growth in the number of international visitors to the Great Barrier Reef economic region has been high. The number of visitors in 1995 was over 700,000, meaning that around 20 per cent of visitors to Australia go to the Reef region. In 1995, 8 per cent of the international visitor nights in Australia were spent in the reef region. The average duration of stay on the region is 9 nights although there are marked differences between markets and the average duration of stay has declined in recent years across virtually all visitor groups. (Table 2.6).



International visitors made up 20 per cent of all visitors to the Great Barrier Reef economic region in 1994 and accounted for 27 per cent of visitor nights. The leading overseas markets were Japan and Europe with significant numbers of North Americans. Visitor numbers are lower for New Zealand and Asia other than Japan although the latter appears to be rapidly increasing in importance.

There are some notable differences between the proportional distribution of different nationalities who visit Australia and those who visit the Great Barrier Reef region. (Table 2.7). The region has a far higher proportion of visitors from Japan, North America and Europe than the Australian average while the percentage of visitors from Asia other than Japan and New Zealand is much lower. Although the proportion of visitors from Asia other than Japan is increasing these visitors still made up a small proportion of visitors to the Reef in 1995 compared with their share of the market nationally.

A notable characteristic of tourism to the Great Barrier Reef economic region is that 85 per cent of international visitors to the entire region go to Far North Queensland. In fact Cairns is the only centre in the reef hinterland where more than 50 per cent of visitors in commercial accommodation are from overseas. This situation is a result of the range of attractions in the Cairns area, including the proximity of the Reef to the coast and the existence of an international airport. With most tourism growth coming from international visitors international access to a region assumes a great deal of importance in regard to the long term growth possibilities of the tourism industry.

**TABLE 2.4 Visitor Nights to the Great Barrier Reef Economic Region by Origin (% of total)**

	1991	1992	1993	1994
Brisbane	13	12	9	15
Qld Country	38	36	36	31
<b>Total Intrastate</b>	<b>51</b>	<b>48</b>	<b>45</b>	<b>46</b>
NSW/ACT	10	11	14	14
Victoria	8	6	9	7
Other States	5	8	6	6
<b>Total Interstate</b>	<b>23</b>	<b>25</b>	<b>29</b>	<b>27</b>
<b>International</b>	<b>26</b>	<b>26</b>	<b>26</b>	<b>27</b>
<b>Total Nights (number)</b>	<b>22,029</b>	<b>21,536</b>	<b>21,674</b>	<b>23,028</b>

Source: International Visitor Survey and Domestic Tourism Monitor, based on visitors 15 years and over (IVS) and 14 years and over (DTM)

**TABLE 2.5 Visitors to The Great Barrier Reef Economic Region by Origin (% of total)**

	1991	1992	1993	1994
Brisbane	13	11	10	11
Qld Country	63	59	62	55
<b>Total Intrastate</b>	<b>76</b>	<b>70</b>	<b>72</b>	<b>66</b>
NSW/ACT	5	5	6	8
Victoria	3	3	3	4
Other States	1	3	2	3
<b>Total Interstate</b>	<b>9</b>	<b>11</b>	<b>11</b>	<b>15</b>
<b>International</b>	<b>14</b>	<b>18</b>	<b>18</b>	<b>20</b>
<b>Total Visitors (number)</b>	<b>3,254</b>	<b>3,165</b>	<b>3,341</b>	<b>3,400</b>

Source: International Visitor Survey and Domestic Tourism Monitor, based on visitors 15 years and over (IVS) and 14 years and over (DTM)

**TABLE 2.6 Average Duration of Stay for International Visitors to the Great Barrier Reef Economic Region (Nights)**

	1991	1992	1993	1994	1995
North America	11	10	9	9	9
Japan	6	4	4	4	4
Other Asia	13	9	7	8	5
Total Europe	16	14	14	13	12
New Zealand	18	15	13	11	20
Rest of World	17	11	16	11	16
<b>Total</b>	<b>12</b>	<b>10</b>	<b>9</b>	<b>9</b>	<b>9</b>

Source: International Visitor Survey

**2.2.4 Factors Affecting Tourism**

The natural attractions of Queensland, particularly the Great Barrier Reef, draw people to the region. However the continued viability of the tourism industry is influenced by a number of factors including airlinks, suitable accommodation (which can be encouraged by a good investment environment), and the maintenance of an internationally competitive product. High standards of service must be sustained and high quality experiences delivered.

Workforce training and the development of professional industry standards through such mechanisms as accreditation schemes are key elements in the development of an internationally competitive and sustainable tourism industry.

Other factors which can effect the competitiveness of the Australian tourism industry, and thus Great Barrier Reef economic region visitor trends, include international currency exchange rates, differing tax regimes and policies (both in Australia and overseas), and international travel fashions.

**TABLE 2.7 Percentage of total visitation for each Country for GBR Economic Region and Australia**

		1991	1992	1993	1994	1995
North America	Australia	14	12	11	10	10
	GBR	<b>25</b>	<b>20</b>	<b>22</b>	<b>17</b>	<b>17</b>
	Variation	11	8	11	7	7
Japan	Australia	22	24	22	21	21
	GBR	<b>25</b>	<b>31</b>	<b>30</b>	<b>32</b>	<b>34</b>
	Variation	2	7	8	11	13
Other Asia	Australia	16	19	23	28	30
	GBR	<b>3</b>	<b>5</b>	<b>7</b>	<b>7</b>	<b>9</b>
	Variation	-13	-15	-17	-21	-21
Total Europe	Australia	22	22	21	21	20
	GBR	<b>37</b>	<b>36</b>	<b>34</b>	<b>34</b>	<b>33</b>
	Variation	15	14	13	13	13
New Zealand	Australia	20	17	17	14	14
	GBR	<b>7</b>	<b>6</b>	<b>4</b>	<b>6</b>	<b>5</b>
	Variation	-13	-11	-13	-8	-9
Rest of World	Australia	5	5	5	5	5
	GBR	<b>3</b>	<b>2</b>	<b>3</b>	<b>3</b>	<b>3</b>
	Variation	-2	-3	-2	-2	-2

Source: International Visitor Survey  
International Air Services

The number, origin and timing of air services can be crucial to the ability of a destination to compete as a major attraction for visitors. International air services to and from Australia are regulated by a comprehensive set of agreements with around 50 countries. The decision on whether or not to exercise the landing rights to particular cities is left to the commercial judgement of the airlines concerned.

The timing of scheduled visits can have a significant effect on visitor expenditure habits at a destination. Early morning arrivals and evening departures can encourage people to undertake more activities, such as Reef visits, during the day. Conversely such timetabling can reduce the return to the accommodation sector. Recent changes to airline arrivals from Japan, resulting in evening rather than morning arrivals, may have meant that Japanese visitors, who are usually on short, tightly scheduled trips are spending a day less in Cairns.

In the Great Barrier Reef area, both Cairns and Townsville Airports are designated as international airports, however no scheduled international airlines currently operate to Townsville. Cairns and Townsville both have the capacity to take 747 type aircraft. The regional domestic airports of Proserpine, Hamilton Island, Mackay and Rockhampton can take aircraft up to 767 size with some weight restrictions. Both Rockhampton and Proserpine could be upgraded if required, although no expansion is possible for Hamilton Island. Gladstone and Cooktown airports can only take small aircraft.

Airport passenger movements to the region are dominated by Cairns (Table 2.7). There are currently 9 airlines from 9 different countries which provide scheduled international services to Cairns from countries such as Japan, Korea and Indonesia. Under Australia's international bilateral air services agreements the airlines of 31 countries have the right to fly into Cairns, while the airlines of 29 countries have the right to fly into Townsville. However all of these are unlikely to be taken up as many countries are restricted to 1 or 2 ports of call in Australia and airlines will be seeking to use airports that best suit their commercial objectives. Charter flights may operate directly into non-designated international airports subject to approval being gained from the relevant transport and passenger processing agencies. Australia has a very liberal policy on international air charters, and the Federal Government is currently examining options to facilitate further growth in charter operations to Australia. Places such as Hamilton Island and Mackay have received charter flights in the past.

Interstate aviation is not subject to Government economic regulation. There are a range of both mainland and island destinations in the Great Barrier Reef area which receive scheduled domestic aviation services.

**TABLE 2.8 Airport Passenger Movements 1995**

	Regional	Domestic	International	Total	% of GBR Total
<b>Cairns</b>	202,828	1,641,199	806,229	2,650,256	60
<b>Townsville</b>	141,431	447,960		589,391	13
<b>Hamilton Island</b>		305,118		305,118	7
<b>Proserpine</b>	7,884	89,107		96,991	2
<b>Mackay</b>	62,825	219,343		282,168	6
<b>Rockhampton</b>	88,085	219,979		308,064	7
<b>Gladstone</b>	101,675			101,675	2
<b>Bundaberg</b>	73,231			73,231	2
<b>Total</b>	<b>677,959</b>	<b>2,922,706</b>	<b>806,229</b>	<b>4,406,894</b>	<b>100</b>
<b>% of Total</b>	<b>15</b>	<b>66</b>	<b>18</b>		

## Accommodation and Investment

The performance of the accommodation sector in the economic region has been fairly good in recent years. Most centres have been able to achieve increasing room occupancy and average room rates over the last decade or so. The best performer has been Cairns which has shown a marked increase in both occupancy levels and average room rates since 1991, although recent figures suggest a flattening out of occupancy rates in 1996-97. Occupancy levels tend to be highly seasonal throughout the region, however the Whitsunday Shire is the only major accommodation area where these fluctuations are also reflected in a significant variation of average room rates. The high room rates in the Whitsunday area reflect the generally higher charges of island resorts, while the seasonality is probably a result of a dependence on the interstate market. Generally higher room rates in the Cairns region are a reflection of higher quality overseas focused accommodation compared with other regional centres which mainly accommodate intrastate visitors.

Although not at the high level of the late 1980's investment has continued in the Great Barrier Reef region. Even though many projects do not proceed further than the drawing board a number, such as the soon to be completed Oasis Resort in Cairns, continue to be completed. Unfortunately some resorts completed or upgraded in recent years have not been financially viable and are currently on the market at reduced prices. Examples of this include Laguna Keys near Proserpine and a number of the island resorts. This may reflect the pressure of international competition in this market sector and the relatively high establishment and maintenance costs.

The ability of the tourism industry to service anticipated increases in demand is vital to its continued growth. Without the provision of sufficient capital to fund the next phase of tourism infrastructure development, tourism will be impaired by industry bottlenecks. An example of the problems that can occur is in Airlie Beach/Shute Harbour, where growth of the marine tourism industry is likely to be impeded by a lack of marina spaces. Leaving aside environmental issues, at least two proposals in the area have not been able to proceed because they have been unable to attract investor interest.

## **2.3 Tourism on the Great Barrier Reef**

### **2.3.1 History**

There is limited information available on the history of tourism use in the Great Barrier Reef, however a useful report produced for the Authority by Claringbould *et al* (1985) reviews a wide variety of data sources from the period 1946 - 1980, particularly looking at indicators such as Tourist Composition, Seasonality, Tourist Accommodation, Transport and Recreation/Communication. David Hopely (1989) also provides a good summary of the growth of the tourism industry since the second World War. More detailed histories are available for specific areas such as the Whitsunday's and Green Island Cay, off Cairns.

Hopely noted that the attraction of the Great Barrier Reef as an escape from urban life was romanticised by the best selling books of the writer E.J. Banfield. Under the nom de plume of 'Beachcomber' between 1897 and 1923, he lived as a recluse on Dunk Island and wrote numerous books and articles extolling the virtues of the reef and islands and developing their tourist mystique.

Claringbould concluded that Reef related tourism increased by "a factor of forty over the period 1946-1980, in some cases exceeding the Queensland and Australian averages". Not surprisingly, the least data is available for the period 1946-1956, with also very limited information between 1957-1967. By the late 1960's tourism agencies had begun to collect data on a more regular basis, although the use of different measures and methodologies was a consistent problem, as it is to the present day.

One of the earliest instances of tourism use is the development of Green Island Cay, 27 km off Cairns. Originally used by beach de mer fishermen the first "accommodation" - a few

grass huts for fishing and hunting parties - was built in 1889. Organised pleasure cruises commenced in 1890. Hopely reports the famous American geomorphologist, W.M. Davis, visited the island in 1915 after travelling to Cairns by steamer. The world's first glass-bottomed boat for coral viewing was located at Green Island in 1937, and in 1938 the forerunner of the present resort was commenced and began operating in the 1940's. In 1963, the new Coral Cay Hotel was opened. By 1989, Green Island was the most visited location on the Great Barrier Reef with numbers increasing from 28,000 in 1958 to 98,000 by 1981 and 400,000 by 1988/89.

Another early resort was established in 1932 on Heron Island at the southern end of the Reef. Both Green and Heron Islands were reasonably close to the mainland. Choppy seas and distance to the Reef were overcome elsewhere by establishing resorts on the inshore continental islands, in the Whitsunday Group in particular.

Claringbould describes the story of growth in the Whitsunday's as follows: "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 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".

Sea transport was divided into two categories: coastwise traffic by overseas, interstate or intra-state sea going vessels; and feeder traffic launch from ports to islands. According to Claringbould's report, considerable tourist traffic to North Queensland in the pre-war period was based on a sea voyage up the Queensland Coast. The ships departed from Melbourne, Sydney and Brisbane and spent up to three days berthed at Cairns. The cruises lasted 2-3 weeks. Feeder launch services operated between Cannonvale or Mackay to the established Island resorts. The 1947 Tourist Board's report considered that "the majority of the Island tourist resorts have inadequate landing facilities".

While some of the earliest tourist activity was by boat, tourism or "travelling" was largely limited in the Reef region in the post-war period by its distance and inaccessibility from southern centres. Completion of the northern railway to Cairns in 1924 reduced the effective distance from southern capitals and train travel was the most popular transport to northern towns, with launches and some minor use of seaplanes as the main transport to offshore island and cay "resorts". A Queensland Tourist Development Board report (1947:p.17) comments that: "to date, Barrier Reef development has mainly been upon the lines of tourist accommodation houses established at Barrier Reef Islands - mainly high islands. As most of Queensland's Reef tourist accommodation houses are on the high islands, comparatively few tourists have seen the real Barrier Reef".

Claringbould reports that air transport to the region was very restricted in the post-war period with only Australian National Airlines Pty Ltd (later Ansett) providing a skyliner service between Brisbane and Cairns. As at 1947 the newly inaugurated Commonwealth owned Trans Australian Airlines did not operate north of Brisbane. The 1947 Tourist Board's report noted (p.52) that "many people of course, are not yet air-minded, but we feel that this is only a matter of time before air travel between far distant points becomes the rule rather than the exception". It was observed there were landing strips on Dunk and Lindeman Islands at this time.

Road transport to the Great Barrier Reef region was limited due to limited private car ownership and inadequate roads. In 1947, the Bruce Highway was not completed and where alternative routes existed they were subject to delays and adverse weather conditions. Queensland government records, as reported by Claringbould, indicate private motor vehicle registration for the state in 1947 as being 72,398. By comparison, this had grown to 420,401 in 1967 and to 794,700 by 1977/78.

Another noteworthy feature during the period covered by the Claringbould report is the growth in the extent of the Queensland National Park estate, which had begun in 1936. From 1947-1956 some 3133 hectares were proclaimed as National Parks consisting of various islands and part of Magnetic Island. Quoting again from the Tourist Development

Board Report (1947): "In Queensland we have in the Great Barrier Reef a tourist attraction unique in the world and one which, without exaggeration, can be regarded because of its unusual nature and beauty, as a wonder of the world which should be seen by millions of tourists in years to come".

The National Park estate in the Great Barrier Reef Region grew by a further 44,963 hectares between 1956 and 1967, and 904,889 hectares up to 1980, bringing the total at that stage to 983,395 hectares for the region. Of course, by this stage the Great Barrier Reef Marine Park had also been proclaimed.

Technological improvements over time have greatly increased the attractiveness of the Reef and permitted easier access. Scuba diving and snorkelling have been popular activities only since the 1950's and glass-bottomed boats have been replaced with semi-submersible vessels which have improved coral viewing for those who do not wish to venture underwater.

Domestic airline services and terminals improved in the late 1980's, with international air links established in Cairns and Townsville. By the late 1980's, Hamilton Island had a runway serving wide-bodied jets, and smaller runways capable of taking nineteen-seater Otter aircraft were established on Lizard, Dunk, Lindeman, Brampton, Great Keppel and Lady Elliott Islands. Access to most other resorts was also possible by helicopter or seaplane. By 1989, over two-thirds of visitors to the island resorts arrived by air.

On the outer reef, tourist traffic has changed in two ways. First the difficulties of reaching the Reef by boat from the mainland have been overcome by the introduction, since 1982, of high-speed (>20 knots), high-capacity (>130 passengers), aluminium catamaran boats - the 'fast cats'. Even faster wave-piercing vessels were introduced in the early 1990's. According to Hopely, writing in the late 1980's:

*"In 1980 there were some 120 charter boats operating in Reef waters. By 1984-85 there were 276: 52 in Cairns region, 175 in Central region, and 50 in Capricorn (Capricornia); 40% of the capacity was catered for by the high-speed 'cats'. Use of amphibious aircraft and helicopters has also increased. New activities on the outer reef are concentrated particularly in the Cairns, Townsville and Whitsunday areas. They include the establishment of moored pontoons, coral-viewing vessels (including semi-submersibles) and other permanent or semi-permanent facilities which focus visitor usage on specific reefs.*

*Mother ships have for some time provided overnight accommodation for vessels during the Cairns game-fishing season between August and October. Vessels have been semi-permanently moored at reefs (for example, Hardy and Michaelmas) for a number of years. Early in 1988, the first custom-built floating hotel weighing 12 000 tonnes, of seven-storey high and with accommodation for 356 people came into operation recently, notably on a three-day route between Townsville and Cairns."*

As mentioned earlier, Great Barrier Reef tourism was traditionally centred on the high islands, particularly those of the Whitsunday group. By 1989, Hopely reported there were twenty-four resorts on the continental islands and only three (Lady Elliott, Heron and Green) on true coral cays. He went on to say:

*"In 1947, the existing island resorts recorded only 5000 visitors, but by 1984 the figure had jumped to over 150 000. Between 1983 and 1985 there was a 26 per cent increase in capacity to over 5000 beds. There are plans to build or extend resorts on fourteen more islands. Although 75% of island tourism is centred on the fringing rather than the outer reefs, highest occupancy occurs in the critical coral-reproduction period of spring-early summer. International tourists in particular are now extending the tourist season into the summer months. As the tourist developers invest more capital in resorts and infrastructure, incentives exist to attract visitors to the region, even when the weather may be hot and rainy."*

According to a GBRMPA report by Driml (1987),: "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% of the Australian total have their destination in the Reef region and adjacent mainland". The report goes on to describe the nature of tourism in the mid-1980's in these terms:

*"It is not only the 151,000 people who stay on island resorts (for 790,000 visitor nights in 1984/85) who make up the 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. The 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 provided 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."*

The economic value of the combined land and sea Reef regions was estimated in 1987 at around \$200 million, measured as a gross output. A GBRMPA report compiled in 1994 by the same author, reported that between 1984-5 and 1991-2 visitor nights increased 70%, involving some 243,800 visitors for 1.8 million visitor nights.

As an adjunct to existing tourist facilities and as a means of increasing awareness of the Reef, a reverse concept was applied with the development of the Great Barrier Reef Wonderland Aquarium, which brings the marine environment on to land. The complex, which includes the world's largest living-coral reef 'in captivity', opened in 1987 and caters for people who cannot otherwise visit the Reef and provides valuable educational background.

### 2.3.2 Visitors to the Reef

The best indicator of visitation to the Great Barrier Reef is provided by Environmental Management Charge (EMC) data which is collected from commercial tour operators. This provides a figure of 1.7 million visitor days for 1995/96. Table 2.9 provides a summary of information since the introduction of the EMC.

By comparing data from the International Visitor Survey with EMC data it is possible to estimate that between a third and a half of all visitors to the actual Reef are from overseas. The actual numbers are difficult to determine as the EMC data provides information on visitor days rather than visitor numbers and therefore does not allow segregation of multi-day visits.

Furthermore, it is not possible to determine if international visitors who say they have visited the Reef include those who may have only been to an island resort or taken a transfer voyage between continental islands or between such islands and the mainland. These people are not identified by the EMC data because transfer operations do not pay the charge. The number of trips on these services from April 1995 to March 1996 is estimated to be at least 1.1 million although a significant proportion of these are commuters, particularly between Townsville and Magnetic Island.

Indications are that three quarters of international visitors to the region take some form of trip out to the Reef itself. (Table 2.10) This is backed up by a *Reef Tourism 2005/CRC*<sup>8</sup> survey (1996) showing 72% of visitors stated their primary reason for visiting Far North Queensland was to experience the Reef environment. A high proportion of North Americans and Europeans visit the Reef whereas New Zealanders are the least likely to visit. Visitors from Asia other than Japan have historically been less likely to visit the Reef, however there is strong anecdotal evidence that numbers are increasing, partly as a result of operators refining their wholesaling and marketing mechanisms and tailoring their product better for the different markets that make up this growing visitor source.

<sup>8</sup> Cooperative Research Centre - Reef Research Centre, JCU Townsville.

**TABLE 2.9 Visitor Days on Commercial Operations**

Quarter	Zone				Total	% Change (prev yr/Qtr)
	Far North	Cairns	Central C/Mackay			
Sep-93	3,209	266,089	143,241	49,018	461,557	
Dec-93	3,145	237,328	143,711	51,758	435,942	
Mar-94	1,361	205,151	120,596	36,565	363,673	
Jun-94	1,989	177,845	103,785	23,360	306,979	
<b>1993-94</b>	<b>9,704</b>	<b>886,413</b>	<b>511,333</b>	<b>160,701</b>	<b>1,568,151</b>	
Sep-94	1,398	246,141	144,206	24,777	416,522	-10.81
Dec-94	1,634	241,518	154,044	23,679	420,875	-3.58
<b>1994</b>	<b>6,382</b>	<b>870,655</b>	<b>522,631</b>	<b>108,381</b>	<b>1,508,049</b>	
Mar-95	237	204,522	117,006	16,313	338,078	-7.57
Jun-95	634	178,584	108,480	19,337	307,035	0.02
<b>1994-95</b>	<b>3,903</b>	<b>870,765</b>	<b>523,736</b>	<b>84,106</b>	<b>1,482,510</b>	<b>-5.78</b>
Sep-95	1,305	271,925	136,997	26,134	436,361	4.55
Dec-95	2,256	263,899	194,748	56,140	517,043	18.60
<b>1995</b>	<b>4,432</b>	<b>918,930</b>	<b>557,231</b>	<b>117,924</b>	<b>1,598,517</b>	<b>5.66</b>
Mar-96	206	213,168	148,284	18,071	379,729	10.97
Jun-96	361	197,852	135,928	24,216	358,357	14.32
<b>1995-96</b>	<b>4,128</b>	<b>946,844</b>	<b>615,957</b>	<b>124,561</b>	<b>1,691,490</b>	<b>12.35</b>
Sep-96	1,062	251,894	143,173	24,338	420,467	-3.78
Dec-96	2,990	259,469	147,847	18,854	429,160	-20.48
<b>1996</b>	<b>4,619</b>	<b>922,383</b>	<b>575,232</b>	<b>85,479</b>	<b>1,587,713</b>	<b>-0.68</b>

Source: GBRMPA: Environmental Management Charge

**TABLE 2.10 Percentage of International Visitors to the GBR Economic Region who visit the Great Barrier Reef**

	1994	1995
North America	80	81
Japan	80	67
Other Asia	56	71
Total Europe	74	80
New Zealand	46	51
Rest of World	62	43
<b>Total</b>	<b>73</b>	<b>72</b>

Source: International Visitor Survey

**2.3.3 Structure of the Marine Tourism Industry**

The Marine Tourism industry on the Great Barrier Reef consists of 6 sectors:



- Island Transfer
- Day Tours (site specific and roving)
- Live aboard dive
- Fishing Charter
- Bareboat charter
- General charter

The island transfer and day tour sectors form by far the largest part of the industry. These sectors can be further categorised into the wholly commercial businesses (operated mainly by the large and medium sized operators) and the minor and lifestyle operators. There are also appear to be some unlicensed operators.

The industry is spatially concentrated with over 90% of visitor days to 4% of the reefs, with the focus on Cairns/Port Douglas (67%) and the Whitsundays (28%).

There are around 660 operations in the Marine Park using 900 main vessels. Of these operations about 80 are site specific operations and 440 regular rovers. The five major operations account for more than a third of the total visitor days carried and have a strong focus on the inbound tourism market which makes up over 70% of their business. This part of the industry is also reliant on a high level of prepaid and packaged bookings although the structure and reliance on this can vary from operator to operator.

The next 15 largest operators generally have around 1% of the market each. Smaller operators tend to rely more on sales to independent travellers through shops and accommodation in places such as Cairns and Airlie Beach which offer some form of agency service. The bareboat charter industry in the Whitsundays has very distinct characteristics compared to the rest of the industry with pre-booked multiple day charters and 88% of charterers coming from the domestic market.

The structure of the industry also affects the way different sectors raise revenue. While larger operators tend to have more all-inclusive packages, smaller operators, particularly those operating in the backpacker market, tend to rely on the sale of extras such as introductory dives to operate profitably. Average revenue per passenger can be estimated as being between \$130 and \$170, although this needs to be considered in relation to the back-packer market which may be \$50-100 lower than this average.

Employment in the industry, particularly with the smaller operators, involves a substantial amount of casual labour and an element of unpaid labour. Smaller operators tend to have a higher staff/passenger ratio.

Average salaries appear to be in the range of \$25,000 to \$5,000 per annum with salaries making up between 15% and 35% of operating costs. For the day tours sector salaries account for around 22% of costs. In the same sector fuel, repairs and maintenance, and catering each make up about 10% of costs.

### **2.3.4 Factors Affecting Viability of the Marine Tourism Industry**

Australia is competing internationally with other destinations that can offer coral reef experiences, particularly in South East Asia (especially Indonesia) and the South Pacific.

The ability of the Great Barrier Reef to provide a range of visitor experiences for increasing numbers of visitors will depend to some degree on gaining access to parts of the Reef that have in the past been inaccessible due to the distance from shore or because of difficult weather conditions. Changes to visitor patterns in this regard will need to come from advances in marine transport technology.

During the 1980s the Reef tourism industry expanded rapidly in concert with developments in high speed ferry construction. Catamarans travelling at speeds of over 30 knots and with a capacity of up to 450 people have significantly increased the number of people accessing the outer Barrier Reef.

Further advances in the technology of high speed passenger ferries are unlikely, with changes to Reef access most likely to occur as a result of a move into different concepts in travel such as wing-in-ground effect craft (WIGs). These are fixed wing vessels that ordinarily take off and land in water and fly at high speed at no more than 5 metres above the earth's surface in order to gain aerodynamic efficiency. A WIG craft can fly just above the ocean surface in all normally occurring ocean states and can operate over land. Arrival and departures can be effected from ports, jetties and beaches. Some WIGs are under development in Australia and a small version may be available within two years. It is likely that they will initially be best suited to island transfer operations.

Over time it will be necessary to improve access for international visitors to parts of the Reef outside Cairns. While there are already international access rights to Townsville, this may not be the most appropriate stepping off point for increased reef visitation unless/until the significant changes that are made in marine technology become commercially viable. In an environment where international journeys are becoming shorter it will be increasingly important that direct international flights, with suitable arrival and departure times are available and that the right sort of accommodation is provided.

The requirements of international visitors, and particularly those travelling in large groups can be very different from those of domestic visitors, who are likely to remain a key part of the Reef tourism market for the foreseeable future, particularly outside Far North Queensland and especially in the Whitsundays. In 1996, domestic visitors to Far North Queensland accounted for 50% of total numbers and are regarded as a key part of the marine tourism market.<sup>9</sup>

The long term commercial viability of the tourism industry on the Reef depends on a successful balance of cost competitiveness, being capable of sustaining high standards of service and delivering a high quality product across a range of experiences and meeting best practice environmental management benchmarks in its daily operations. Proper training, and business planning and management will be key elements in maintaining industry competitiveness. Recent research undertaken for the Authority (Gatenby, 1997) indicates that charges associated with operating within the Marine Park were not especially significant beyond the general factor that any increases in operating costs could impact on cost-competitiveness.

The tourism industry on the Great Barrier Reef has access to a number of Australia wide tourism training and accreditation schemes. In addition, a number of Reef-specific initiatives have been developed.

The training research undertaken by the *Reef Tourism 2005* project has identified the needs of the marine tourism industry as a whole. A strategy to address the issues has been developed and has revealed a need for multi-skilling of staff, and the need to develop career paths for staff within the marine tourism industry. A training options analysis is in progress and actions are underway to implement the recommendations of the project.

Several training courses have been developed which are directly related to the Great Barrier Reef:

- The Great Barrier Reef Marine Park Staff Certificate has been developed collaboratively by Reef tourism operators and GBRMPA, using funds from the Environmental Management Charge, to assist the industry in minimising tourism impacts, while increasing tourists' enjoyment and appreciation of the Reef.
- The Coral Reef Biology Course is offered at the GBR aquarium, using the same course materials as the Great Barrier Reef Marine Park Staff Certificate.

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<sup>9</sup> Pers. comment tourism industry representative.

- The Heritage and Interpretive Tourism Course offered at a number of the regional TAFE colleges, provides an overview of the Australian tourism industry, and offers elective modules in a wide range of environmental and cultural areas.

### **2.3.5 Links with the Regional Economy**

The 1994 GBRMPA research publication, *Protection for Profit*, concluded that the gross financial values of the Great Barrier Reef World Heritage Area were \$682 million in 1991-92, of which \$134 million was directly attributable to commercial tour operators. This figure was derived from tourists staying on island resorts and who camp on islands, tourism on commercial passenger vessels and a component of time spent on the adjacent mainland and travelling to the region. When compared with the estimated expenditure for tourism in the Reef region in 1990-91 this implies a contribution of 40% of total regional tourism expenditure and almost 5% of GRP. By using a multiplier to calculate the overall impact on the economy the study concluded that the total direct and indirect value of the industry in 1991-92 was \$1.16 billion.

For this review estimates of visitor expenditure were made for commercial tour operations only. These suggest that direct expenditure on commercial marine tourism operations was between \$240 and \$290 million in 1995/96. Estimates from the recent study suggest that the value of commercial tourism operations in 1995-96 was in the order of \$1.06 to \$1.2 billion.

Despite the difficulties of accurately estimating the financial value of the industry it is clear that the Great Barrier Reef is a major contributor to tourism in the region, and in turn is a key driver in the regional economy. Its role as an attraction is clearly the main impetus behind much of the regional tourism expenditure that is sourced from outside the Great Barrier Reef Region.

## Section Three:

# IMPACTS OF MARINE TOURISM USE ON THE GREAT BARRIER REEF

### 3.0 IMPACTS OF MARINE TOURISM USE IN THE GREAT BARRIER REEF WORLD HERITAGE AREA (GBRWHA)

The impacts of tourism use of the Great Barrier Reef have been discussed and reviewed in a number of papers in recent years (Carey 1993; Kelleher and Dinesen 1993, 1994; Dinesen 1995; Honchin 1996). In November 1995, the Authority convened a technical workshop in Townsville in order to gather information from a variety of researchers and managers involved with the Great Barrier Reef Marine Park. The outcome of the workshop was a "State of the GBR World Heritage Area Report" which documented the status quo in relation to major issues and information.

The findings of the prior reports mentioned above were summarised and discussed comprehensively in a paper presented by Dinesen and Oliver to the workshop. This section draws largely on that composite paper.

#### 3.1 Summary of Impacts

The current tourism use management approach requires individual consideration of tourist permit applications. The procedures for monitoring the impacts of approved developments involve scientifically rigorous monitoring programs, conducted by independent consultants, and often funded and cooperatively supported by tourist operators as part of their permit approvals. Most of the detailed assessment and monitoring currently available has been gained through conditions on projects such as these, and much less information on ecological impacts has been collected elsewhere.

A growing level of concern exists in relation to the real and potential cumulative impacts of increasing numbers of uses which cannot easily be predicted under the case-by-case permit assessment process. For example, there has been concern regarding anchor damage to coral caused by tourist and private vessels. However, apart from some limited information from the Whitsunday region and the 'Cod Hole' (Cairns Section), few data are available at this stage on the extent of anchor damage or recovery of affected corals. It is difficult to predict what might be the long-term impact of the cumulation of thousands of individual anchoring events each causing some localised damage to a particular reef or area.

There is some evidence based on observation that the Authority's policy of requiring tourist operators to use moorings to avoid anchor damage at some reefs in the Cairns Section has proven successful, although further research is required to scientifically verify this conclusion.

Great Barrier Reef Marine Park Authority policy has given first priority to the minimisation of impacts of an ecological nature. However, as tourism use of the Marine Park continues to grow steadily, especially off Cairns and Port Douglas, there has been increasing concern regarding the impacts of tourism on social or amenity values, and on the cultural and traditional values of such areas for indigenous people. Increased numbers of site specific and regular roving tourist operations has led to displacement of some indigenous people from their traditional places, as well as displacement of recreational users from particular areas previously available to them. To a lesser extent, use conflicts also occur between commercial fishers and tourist operations.

The need to understand, monitor and minimise negative impacts is reflected in the marine tourism industry in the Cairns region forming the *Reef Tourism 2005* project which has resulted in the monitoring project and Codes of Conduct discussed in Section 4 of this document.

As noted in previous reviews of Marine Park impacts, the greatest tourism-related threats to the Great Barrier Reef Marine Park and World Heritage Area are considered to be the use and development of adjacent mainland areas. Thus coastal development, loss of mangroves and seagrass areas, and increasing input of effluent associated with urban expansion including tourism infrastructure, could result in greater impacts on the Great Barrier Reef

area, than impacts arising from tourism infrastructure and activities located within the Marine Park.

In summary, there are both ongoing and new threats to the Reef from tourism activity which continue to require management. In general, tourism impacts may be divided into the following broad categories:

- ecological impacts - on features and processes of the natural environment (primarily biophysical);
- social and cultural impacts - particularly in relation to amenity or historical use by other user groups (private recreation, fishing) and impacts affecting cultural values associated with traditional and historical use of the Reef and islands by Aboriginal and Torres Strait Islander peoples;
- tourism use value impacts - related to perceptions of amenity and issues of congestion by tourism operations; and
- impacts of adjacent coastal urban development.

As stated previously, the cumulative effects of individual impacts across all categories are recognised as requiring particular management consideration.

### **3.2 Ecological Impacts**

Tourism activities in the Marine Park tend to be concentrated in heavily used marine and island locations, particularly in the Cairns - Port Douglas and Whitsunday areas<sup>10</sup>. Actual and potential impacts relate to use of vessels and structures, and direct impacts of visitors, and include:

#### **3.2.1 Interference with Nesting Seabirds and Turtles**

Some of the Great Barrier Reef islands which are important nesting or roosting sites for seabirds and other significant avifauna, are also popular tourist destinations. Certain areas, particularly in the Capricorn-Bunker group, are also important nesting areas for sea turtles. Nesting turtles and hatchlings are incredibly sensitive to even minimal disturbances in their breeding areas and consequently, in many instances, tourists need to be completely excluded from sensitive nesting areas.

Some seabird roosting sites, such as Michaelmas Cay offshore from Cairns, have historically high levels of permitted use which are now being recognised as unsustainable. Impact on these sites is directly related to trampling by tourists walking on the cays. The marine tourism industry is working with the Queensland Department of the Environment and the Authority to find an ecologically sustainable solution to the problem which has emerged on Michaelmas Cay.

Zoning provisions, Management Plans, Queensland national parks legislation and permit conditions are being used to prohibit access to some of the most sensitive rookeries (e.g. Raine Island for turtles, and Wreck Island and part of Michaelmas Cay for seabirds). Guidelines for visiting seabird islands have been developed jointly with the Australian Nature Conservation Agency, and are in the process of being refined for use in the context of relevant Great Barrier Reef islands. Specific Management Plans, Best Environment Practices, videos and courses are also important management tools, along with signage, extension and interpretation, in the context of island rookeries which are more heavily used for tourism purposes.

#### **3.2.2 Impacts on whales and dugong**

The major threat to conservation values posed by marine tourism is interference with vulnerable species such as humpback whales, dugong, nesting seabirds and turtles. The Whitsundays is a calving area for humpback whales, and thus there is a need to address

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<sup>10</sup> Although only 4% of the Marine Park these two areas receive more than 90% of the tourism use.

protection of the species in what is a very intensive tourism location. In recognition of the potential for harm and harassment of large marine mammals, particularly by tourist activities such as whale-watching, the Queensland Government has recently drafted subordinate legislation under the *Nature Conservation Act 1992* to provide greater protection for whales and dolphins in Queensland marine waters. The draft *Nature Conservation (Whales and Dolphins) Conservation Plan 1997* includes the Whitsundays Management Area of the Townsville/Whitsundays Marine Park as an "area of special interest for whales". Restrictions apply in the legislation to the proximity that vessels and jet skis can be in relation to whales, pods and calves and dolphins, as well as prohibiting feeding, taking, using and keeping these animals "without reasonable excuse". Additional restrictions apply in Areas of special interest, particularly in recognition of calving areas.

Based largely on observation and studies of the West Indian manatee off the coast of Florida, USA, there is increased recognition of the potential for vessel activity to cause harm or mortality to dugong in certain areas of the Marine Park. Studies on the incidence of watercraft collision with manatees off the coast of Florida have found that medium to large watercraft are more likely to kill or injure manatees than small boats. Motors with more than 10 horsepower are the most dangerous and there is also an increasing risk to manatees from personal motorised watercraft (for example, jet skis). Most injuries are caused by blows from the hull of a vessel or from propeller cuts. Collisions may cause death or debilitating injuries and may reduce breeding capability. The Authority has recognised in its *Shoalwater Bay (Dugong) Plan of Management* that similar risks may apply to dugong within the Plan area. It is highly likely that such risks apply to other important dugong habitat and feeding areas, most notably the Hinchinbrook Channel which is currently the subject of management planning processes by the Authority and the Queensland Government.

### **3.2.3 Anchor Damage and Other Vessel-induced Damage**

Of the impacts of tourist operations on the natural environment, damage to coral has been a principal concern. Although at present there is no evidence to suggest that it is a major problem of ecological significance on a broad regional scale, anchor damage to coral from tourist and recreational vessels has been particularly evident on some fringing reefs in the Whitsunday Islands (Harriott and Fisk 1990; DeVantier and Turak 1995), and is certainly an important aesthetic impact. Site inspections by Marine Park staff, surveys by Harriott and Fisk (1990), and reports from experienced divers in the Whitsunday Islands suggest that some popular anchorages have suffered very high levels of coral damage. High levels of anchor damage have also been identified at a number of reefs offshore from Cairns and Port Douglas (anecdotal reports from management staff, tourists and operators).

Anchor damage from tourist vessels, plus private recreational boats and fishing vessels, is being addressed through a combination of management tools. These are primarily: controls on anchoring designation of 'no anchoring areas' or 'limited anchoring' for smaller vessels only (implemented through Management Plans and Special Management Areas); regulations which prohibit removing or damaging coral; Best Environment Practices (contained in the Great Barrier Reef Marine Park Manual, GBRMPA 1996); training videos and courses for tourist operators. Fixed moorings, either for private or public use, are another means of reducing impacts from anchor damage, however many more moorings are required to cover all sites of concern within the Marine Park.

Observation and anecdotal evidence to date suggests these measures are achieving good results in minimising impacts from anchor damage, however problems with coral damage continue to occur due to inexperience of operators (as with bareboats) or in association with numerous anchoring events where no moorings exist, as in the deep water areas favoured by fishing charters.

### **3.2.4 Damage to Coral from Intensive Diving, Snorkelling and Reef Walking**

Damage to coral by SCUBA divers and snorkellers has also been reported by park managers and Marine Park users. Recent studies (e.g. Rouphael and Inglis 1995) have indicated that damage by qualified SCUBA divers is generally slight. Most damage is caused by a small

proportion of divers and further work is being conducted to determine whether these divers form a specific group (e.g. photographers) which could be targeted for further attention. Diver damage occurs predominantly in areas with branching or other susceptible growth forms. Thus in intensively dived sites, damage can be reduced by directing divers away from the most sensitive areas.

Damage by 'resort' divers remains a matter for concern among Marine Park management staff. Resort divers have no SCUBA qualifications or experience and are given an introductory lecture and dive accompanied by an instructor. Reports from tourist dive masters and casual observations by Marine Park staff, indicate that these inexperienced divers can cause substantial damage to susceptible corals. Further studies on this source of damage are required. In the mean time, the main management tools used to minimise these impacts are Best Environment Practices, training videos and courses, and on-site advice from tourist program staff to visitors to raise awareness (e.g. regarding buoyancy control). In some operations, dives for novices are carried out over sand or less fragile coral, while reef walking by groups of visitors in popular sites is generally supervised by interpretive staff.

Reef walking is only conducted intensively at a few locations (e.g. Heron Island Reef, Hardy Reef, Low Isles) where tides and reef structure allow. Kay and Liddle (1984a) found that the impacts are likely to be localised with damage occurring chiefly in areas dominated by upright branching corals. In a study of one heavily used area at Hardy Reef, Kay and Liddle (1984b) found no obvious signs of trampling damage except at the point where boats landed to disembark tourists. At Heron Island, Kay and Liddle could find no evidence that reef walking tours were causing any damage, although they stressed the need for longer term monitoring before any conclusions could be reached.

### **3.2.5 Effects of Fixed and Moored Structures on Corals and Fish Communities**

During the last ten years or so, pontoons have become standard facilities for larger tourist operations. The more recently installed pontoons are sophisticated two-storey structures incorporating theatrettes, underwater observatories and dining areas, catering for several hundred visitors. The designs of the pontoons and associated moorings must be able to withstand severe cyclone conditions (cyclone category 4). While localised damage may occur during installation, moorings designs (currently under review by the CRC Reef Research Centre) are formulated to minimise the likelihood and impacts of environmental damage which would be caused if pontoons break free during storm conditions. As mentioned above, tourist operators installing facilities such as pontoons are often required to fund environmental monitoring programs, approved by the Authority and conducted by independent experts.

In the early days of Marine Park tourism, there was evidence that shading resulted in decline or death of corals situated beneath the pontoons. While small changes in coral cover and damage have been documented as part of various monitoring programs, no major irreversible ecological damage appears to be caused by pontoons (Ayling and Ayling 1994a, b). Early problems such as shading of coral and damage from mooring equipment have been largely overcome by ensuring pontoons are installed in areas of sand rather than living coral. A full review of data relating to the impacts of pontoons has been carried out by the CRC Reef Research Centre. This study (Nelson and Mapstone, in press) found some evidence that pontoons had a small effect on adjacent biota through shading and the activities of snorkellers and resort divers.

There have also been concerns that pontoons might impact on local reef fish communities by attracting larger predatory fish. Aggregations at pontoons have been censused during monitoring programs and these results have been reviewed by Nelson and Mapstone (in press). The aggregations vary substantially in size and composition between pontoons. The number of predatory fish in an aggregation is closely related to the level of fish feeding which occurs at each pontoon. Cessation of feeding and removal of a pontoon both result in the dispersal of an aggregation. Although there were originally some concerns that large aggregations of predatory fish might result in impacts on fish and invertebrate prey species



near the pontoon, a recent study by Sweatman (1996) of spangled emperor and red bass at two tourist pontoons failed to detect major predatory effects. Based on the evidence from pontoons with different levels of fish feeding activity, it would appear that the size of any predator aggregation is determined primarily by the level of fish feeding rather than the size or presence of the pontoon itself (Berkelmans, unpublished data).

### **3.2.6 Damage to Coral as an Unintended Consequence of Island Development**

There have been isolated instances of quite severe impacts on corals as a consequence of works associated with island resorts in the Marine Park. One particular example involves Heron Island, where an access channel was constructed through a section of the coral reef surrounding the island. The channel had the effect of draining a large area of the reef which under normal circumstances retained water at low tide in a kind of sill created by the natural shape of the reef edge. The drainage effect left large areas of coral exposed above water level for much longer periods than had been normal prior to the channel being created. A separate side effect involved the loss of sand from the island's beaches which not only threatened turtle nesting areas, but also led to the need for the channel to be dredged on a regular basis. Concern at the impact of long-term over-exposure of coral on the reef has led to a solution being devised whereby bund walls have been constructed along each side of the length of the channel to allow water to be retained at low-tide levels approximate to 'pre-channel' conditions.

### **3.2.7 Recreational Fishing and Collecting**

Impacts of recreational fishing are generally considered and addressed separately from marine tourism operations within the Authority. The main concern with these activities is the depletion of target stocks by recreational fishing and collecting (although this involves only a small minority of tourist operations and tourists). Most recreational shell-collecting apparently occurs through specific recreational clubs (Barnett 1989) and there have been concerns about the status of target species in key areas such as Dingo Beach. While little is known of amount or impacts of shell collecting by participants in tourist programs, this is considered relatively minor as many tourist operators strongly discourage shell-collecting even where zoning would permit limited collecting.

As discussed elsewhere, coral damage resulting from anchoring events associated with both commercial and recreational fishing is a key management concern.

### **3.2.8 Effects of Fish Feeding on Fish Communities**

The Authority has developed fish feeding guidelines, to ensure that only appropriate substances and quantities are fed to fish at tourist destinations. These guidelines were developed in response to concerns that inappropriate types of food could adversely affect the health of fish, and that frequent feeding of large volumes of food could promote unduly large and aggressive fish aggregations. Compliance with the guidelines is a requirement on tourist program permits. Current guidelines specify (among other things) that: a) fish food must consist of fresh marine products or commercial fish pellets; b) no more than one feeding station should be operated at each tourist site; and c) no more than 1 kg of food may be used per site per day. Operators are no longer allowed to throw miscellaneous food scraps overboard as part of fish feeding.

### **3.2.9 Waste Discharge and Littering from Vessels**

Complaints have been received sporadically from visitors to the Great Barrier Reef of unpleasant waste discharge from those vessels not fitted with holding tanks, for example in areas where snorkelling is being conducted. Currently Great Barrier Reef Marine Park Authority regulations and permits require that vessels not empty holding tanks within 1 km of the edge of a reef. However, after 1998, discharge of sewage into coastal waters will be prohibited under the Queensland Government's *Transport Operations (Marine Pollution) Act 1995*. Vessels over 10m will be required to fit holding tanks to meet the requirements of this legislation. There are concerns as to whether there will be adequate onshore pump-out

facilities to support the installation of vessel holding tanks. Some larger operators already have pump-out facilities, and have had to strongly lobby for onshore facilities to be provided to support their desire to comply with best practice standards.

Waste discharge from tourist vessels is not considered to be of ecological significance, but may be problematic on a local scale, such as adjacent to marinas and in bays (e.g. in enclosed Queensland waters in the Whitsundays), however at this stage, no data appear to be available to confirm this view.

Littering of any kind is totally prohibited within the Marine Park under MARPOL<sup>11</sup> Annex and Australian legislation. Since plastic and other debris in the water and on beaches are perceived by the public as evidence of marine pollution, tourist operations generally strive to minimise such litter and consequently this is rarely raised as problem in respect of tourism operations. No data appear to be available on the illegal dumping from tourist operations.

### **3.2.10 Vegetation Damage**

Tourist trampling of vegetation on offshore islands and cays is a potential problem at some heavily used locations. Valentine, et al. (1985), conducted an inventory of beach conditions on major National Park islands in the Whitsundays region. That study identified "considerable readily measured human use impacts" which were found to occur "on virtually every desirable beach site although impacts are greater on more accessible sites". The survey also found that; "The most concentrated areas of usage are those based on aeolian deposited features which are held in place only by their securing vegetation. With this in mind it becomes imperative to maintain beachfront vegetation in particular and stands of back vegetation in general, as a buffer to wind and erosion. These island beaches while attractive are not extensive, and must be treated as a limited resource." In general these areas, once identified, are managed through the use of marked trails and restrictions on visitor numbers.

## **3.3 Social and Cultural Impacts**

Great Barrier Reef Marine Park Authority policy has given first priority to the minimisation of impacts of an ecological nature. However, as tourism use of the Marine Park continues to grow steadily, especially off Cairns and Port Douglas, social and cultural issues are receiving much greater attention in Marine Park zoning, management planning and permit assessment.

Major and rapid growth in the tourism industry has led to displacement of traditional and historical use, notably private recreation and traditional hunting and fishing. While little research has been undertaken on social and cultural impacts of marine-based tourism, increasing concern from both affected stakeholders and park managers has led, during the past couple of years, to social and cultural issues having a much higher profile in park management permit assessment and planning (e.g. Great Barrier Reef Marine Park Authority 1994a; Williams in press). Some data on the social and cultural impacts are available from recent surveys and research, and from public submissions as part of the development of Marine Park zoning and management plans. Indigenous representatives have also emphasised the economic impact of loss of access to hunting areas given the high subsistence component of many indigenous community economies.

In the case of indigenous users, the concern over loss of access to traditional hunting grounds and significant cultural sites has been accompanied by native title claims for rights over some islands and surrounding sea bed areas inside the Marine Park and World Heritage Area. While these claims are awaiting the outcome of a test case involving Croker Island in the Northern Territory, the Authority's responsibility for protecting and managing the social and cultural values of the Reef is enshrined in the Marine Park legislation, and has been expanded as a result of World Heritage obligations.

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<sup>11</sup> *International Convention for the Prevention of Pollution from Ships 1973 and its 1978 Protocol (MARPOL73/78)*

### 3.4 Impacts on Tourism Use Values

Complex value judgments arise in considering the "presentation" values of the Great Barrier Reef. On the one hand strong growth in tourism and demand for reef visits constitutes strong evidence that "presentation" of the Reef is a valuable natural experience for a large and growing number of people. On the other hand, if left unmanaged, these large numbers of people, and any impacts they may be having on the Reef, may be diminishing the quality of the "presentation" experience to some extent.

The Authority recognises both the varied needs and expectations of visitors to the Marine Park, as well as the inherent difficulty in attempting to meet these in all places at all times. The management response is to plan for a diversity of opportunities and experiences across the Marine Park, while also considering amenity as part of statutory considerations in relation to tourism use permit applications.

### 3.5 Impacts Associated with Adjacent Coastal Urban Developments

In terms of potential threats to Great Barrier Reef World Heritage values the effects of urban development, including infrastructure such as marinas and resorts needed to support the marine tourism industry, pose a major problem for marine park management.

While the impacts of many activities taking place within the Marine Park can be managed and regulated directly by the Authority, the situation with respect to adjacent areas is more complex. Activities (including tourism development, urban development and agriculture) located on the adjacent mainland, coast and islands may impact directly or indirectly on the Great Barrier Reef Marine Park and World Heritage Area.

Briefly, the impacts of major tourist developments sited on the adjacent coastline and islands can include (partly after Kelleher and Dinesen 1993);

- loss of habitat such as mangroves and seagrass beds resulting from dredging and reclamation for marinas and resorts;
- dumping of dredge spoil;
- increased effluent discharge from resorts which may cause reduced water quality (only those outfalls discharging directly into the Marine Park are required to have tertiary treatment);
- effluent, fuel and antifouling preparations from marinas and/or from recreational and commercial vessels in marinas; and
- effects on social and cultural values arising from such development, including impairment of aesthetic values and displacement of traditional and historical use.

The cumulative impacts of coastal development for tourism and other purposes may be more significant than those associated with tourist activities taking place within the Marine Park. A recently commissioned report to the Authority on the World Heritage Values of the Great Barrier Reef will be used *inter alia* as a basis for clarifying and enhancing consideration of these values in planning and development approval processes.

## SECTION FOUR: MANAGING SUSTAINABLE MARINE TOURISM USE IN THE GBRWHA

## 4.0 MANAGING SUSTAINABLE MARINE TOURISM USE IN THE GBRWHA

### 4.1. Management Framework

#### 4.1.1 GBR Region and Legislation

Following a lengthy and often controversial public debate throughout the 1960's, calling for protection of the Great Barrier Reef and focussing in particular on the issue of proposed oil and mineral exploration and extraction, the Great Barrier Reef Marine Park and Authority were established under *The Great Barrier Reef Marine Park Act 1975*, which states:

*"5.(1) The object of this Act is to make provision for and in relation to the establishment, control, care and development of a marine park in the Great Barrier Reef Region in accordance with the provisions of this Act, to the extent that those provisions are within the legislative powers of the Parliament and, in particular but not to the exclusion of any other relevant power, its powers with respect to in relation to-*

- (a) the Australian coastal sea;*
- (b) rights including sovereign rights and obligations of the Commonwealth in relation to the continental shelf of Australia;*
- (c) external affairs;*
- (d) fisheries in Australian waters beyond territorial limits;*
- (e) places required by the Commonwealth for public purposes;*
- (f) trade and commerce with other countries, including the import or export of animals and plants;*
- (g) statistics relating to animals and plants; and*
- (h) matters incidental to the execution of the powers of the Government of the Commonwealth,*

*and this Act shall be administered accordingly."*

The Act sets out the functions of the Authority as well as detailing the establishment of statutory consultative arrangements (the Great Barrier Reef Consultative Committee) and management tools and provisions including Zoning Plans, Permissions (permits) and Plans of Management (following amendment in 1993). Amendments to the Act in 1993 also provide for the collection and administration of the Environmental Management Charge.

The Act provides that the management of the Marine Park must be in accordance with the following objectives:

- (a) the conservation of the Great Barrier Reef;
- (b) the regulation of use of the Marine Park so as to protect the Great Barrier Reef while allowing the reasonable use of the Great Barrier Reef region;
- (c) the regulation of activities that exploit the resources of the Great Barrier Reef region so as to minimise the effect of those activities on the Great Barrier Reef;
- (d) the reservation of some areas of the Great Barrier Reef for its appreciation and enjoyment of the public; and
- (e) the preservation of some areas of the Great Barrier Reef in its natural state undisturbed by man except for the purposes of scientific research.

Clearly, the primary purpose of the Act in establishing the Marine Park was to ensure conservation of the natural and cultural values of the Great Barrier Reef and to protect it against potentially damaging activities. Also, the Act specifically bans mining activities, reflecting public concern at the time the Marine Park was created.

The Act also established that day-to-day management of the Marine Park was to be a joint arrangement between the Authority and the Queensland Government. Given the Act grew out of a cross-jurisdictional dispute between the Commonwealth and the Queensland Governments, the task of making the Authority operational required an enormous act of political cooperation. The joint arrangements between the two spheres of government were formalised through a political compact known as the "Emerald Agreement". Under this Agreement the Authority contracts to, and pays, the Queensland Government for the day-to-

day management of the Commonwealth jurisdiction, including all field, surveillance and enforcement services.

The 1995 amendments to the Act incorporated provisions for the making of statutory Plans of Management, as opposed to management plans which previously had only the force of policy. Under these new provisions a further set of objectives ("Objects of plans of management" - Section 39Y) was set down to guide the detailed management approach. These objects explicitly direct the management of particular areas of the Marine Park in terms of ecologically sustainable use, and protect nature conservation, cultural, heritage and scientific values through ensuring "appropriate proposals are developed to reduce or eliminate the threats". Other objectives provide for co-management with special interest community groups and to enable people using the Marine Park to participate in "a range of recreational activities".

The *Great Barrier Reef Marine Park Authority Annual Report 1995-96* restates the Goal of the Authority as follows:

*The Authority's goal is to provide for the protection, wise use, understanding and enjoyment of the Great Barrier Reef in perpetuity through the care and development of the Great Barrier Reef Marine Park. The Authority's goal is inclusive, encompassing a wide range of opportunities. However, the Authority holds that conservation of the Great Barrier Reef is its primary obligation, and all other activities are dependent on this over-riding responsibility. The Authority's aims are subordinate to the primary goal and must be read in conjunction with it and with each other.*

In addition to the legislative framework, the Authority must be guided in its management approach by the policy directives of the government of the day. It needs to also give due consideration to the concerns of the various stakeholder interests in the Reef Region as well as having regard to the broader public interest.

#### **4.1.2 World Heritage Area Obligations**

The extraordinary values of the Great Barrier Reef were further recognised with its listing as a World Heritage 'property' under the international *World Heritage Convention*, to which Australia is a signatory. Its inscription on the list on 26 October 1981, on the basis of its "outstanding natural, cultural and historical features and its integrity as a self-perpetuating ecological system"<sup>12</sup>, means the Great Barrier Reef, including most islands and some inshore areas<sup>13</sup> are also subject to the Commonwealth's *World Heritage Properties Conservation Act 1983*. This Act provides the domestic legislative framework for Australia to carry out its obligations to "do all it can...to the utmost of its resources" to ensure "the identification, protection, conservation, presentation and transmission to future generations of the cultural and natural heritage" within its territory<sup>14</sup>.

The 1995 amendments to the *Great Barrier Reef Marine Park Act* gave recognition to the Authority's broadened responsibilities as a result of World Heritage Listing of the Reef by requiring (under Section 39YA(1) that statutory Plans of Management "must have regard to (a) the protection of world heritage values of the Marine Park; and (b) the precautionary principle".

Further recognition of the need for a different management approach for the Great Barrier Reef World Heritage Area was given in January 1996 when the 'Inter-agency Cooperative Arrangements for the Management of the Great Barrier Reef World Heritage Property', was signed by the Commonwealth agencies involved in management of the World Heritage Area. The Memorandum of Understanding formalised the Authority's position as the lead agency

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<sup>12</sup> From "The Great Barrier Reef; Keeping It Great. A 25 Year Strategic Plan for the Great Barrier Reef World Heritage Area", Townsville, 1994, pp 1.

<sup>13</sup> The Great Barrier Reef World Heritage Area encompasses not only the Great Barrier Reef Marine Park (93% of the World Heritage Area), but also Queensland waters not in the Great Barrier Reef Marine Park (2%), and islands previously under the primary management control of the Queensland Government (5%)

<sup>14</sup> Convention for the Protection of the World Cultural and Natural Heritage, Paris, 1972.

for Great Barrier Reef World Heritage issues and extended the Authority's role and responsibilities to management of areas outside the Marine Park, but inside or adjacent to the World Heritage Area, for example some coastal strips and channels.

There is ongoing debate in the wider community about the range of activities deemed appropriate in terms of "presentation" of the World Heritage Area, however it is generally agreed that education, interpretation and showing the Reef to visitors are important elements of presenting the Area. The Authority recognises that the marine tourism industry is a primary vehicle in meeting Australia's obligations under the World Heritage Convention for "presentation" of the Great Barrier Reef World Heritage Area.<sup>15</sup>

#### **4.1.3 25 Year Strategic Plan for the Great Barrier Reef World Heritage Area**

The 25 Year Strategic Plan was developed over a two-and-a-half year period, through an extensive consultation process involving industry and other user groups, interest groups and government agencies as well as public participation. Released in 1994, this Plan provides a general strategic framework for the conservation and ecologically sustainable development of the Reef region well into the next decade. The primary purpose of the Plan was to develop a shared vision and goals for management of the Great Barrier Reef across the broadest range of stakeholders.

Through the 25 Year Strategic Plan a range of Shared Principles was developed to ensure Australia's obligations in relation to World Heritage Listing are met. The concept of *ecologically sustainable use* was a cornerstone of the Strategic Planning process. In addition to ecological values, the Strategic Plan addresses World Heritage obligations in relation to cultural and heritage values of the Great Barrier Reef region. Relevant Shared Principles include:

- Recognition of the special situation of Aboriginal and Torres Strait Islander people, especially their needs for culturally appropriate negotiation, and the relationships of Aboriginals and Torres Strait Islander people with the resources of the World Heritage Area.
- Recognition of the right of Aboriginals and Torres Strait Islanders to determine if, and how, information regarding their cultures should be gathered and used.

Regardless of any future legal determinations regarding the existence of indigenous land and sea rights within the Great Barrier Reef region the Authority, is committed to the identification, recognition and protection of indigenous and non-indigenous cultural heritage within the World Heritage Area. The commitment to indigenous culture and heritage has been most recently demonstrated through the increase of the Marine Park Authority from three to four members, with the additional member to be a person representing indigenous interests.

#### **4.2 Past Approaches to Tourism Management on the GBR**

Tourism is the principal and most rapidly growing industry in the Great Barrier Reef province, and its management is a major task for the Great Barrier Reef Marine Park Authority and other agencies, such as the Queensland Department of Environment, involved in managing the World Heritage Area.

The principal objective of the Authority in managing use, including tourism, is to protect the natural values and ecological processes of the Great Barrier Reef province. In addition, the Authority has responsibilities to provide for a range of uses consistent with conservation of natural features and processes. With growth in use, greater attention is now being paid to maintenance of social and cultural values which may be impacted upon by, for example, increasing tourism activity (see, for example, Honchin 1996; Williams in press and other reports in this publication.) The Authority is not responsible for managing commercial

<sup>15</sup> See Appendix B, section 2.

aspects of the tourism industry, but management for Marine Park and World Heritage objectives may have economic implications for industry and other stakeholders.

#### **4.2.1 Zoning Plans**

Zoning of the Great Barrier Reef Marine Park was completed in 1987. Although Zoning Plans have been a major and integral component of management of the Great Barrier Reef Marine Park, the primary effect of Zoning Plans has, to date, been to define where extractive activities, such as trawling, line fishing and collecting are allowed, restricted or prohibited. Tourism use has not been spatially referred to in Zoning Plans. This was because, in the early years of the Marine Park, tourism use was very low and a permits-based approach to management was the best option at that time given that "tourism" is made up of many different activities each of which required individual assessment. Tourism is allowed, subject to permit requirements, in all zones except Scientific Research Zone and Preservation Zone - that is, in over 99% of the Marine Park. During a recent rezoning of the Cairns Section, a No Structures Sub-zone was introduced to, among other things, place some limitations on the location of permanently located or moored facilities such as pontoons. Aside from this limitation on structures, the Zoning Plans have provided no overall framework for the management of Marine Park tourism.

#### **4.2.2 Permits**

Until recently, the principal tool used to manage tourism on the Great Barrier Reef has been the permit system. Applications for tourist program permits and facilities are individually assessed against a series of criteria in the legislation (Great Barrier Reef Marine Park Regulations, Reg. 13AC(4)), broadly dealing with likely impacts on ecological features, and to some extent on social and cultural values although these values have not been easy to define without stakeholder input. Major infrastructure projects occasionally trigger additional legislation concerning environmental impact assessment of major proposals.

Permits have been supplemented by management plans for some intensively used areas, but until recently these plans had no statutory basis. They have therefore been regarded only as policy guidelines, have not been consistently implemented, and have been subject to appeals by tourist permit applicants. A few Special Management Areas have been applied to individual reefs or bays on a very localised basis to deal with impacts of use.

Education of park users has always been considered an important ingredient of management, particularly considering the size of the Marine Park and the huge enforcement difficulties this presents. However, education programs and products have tended, historically, to focus on providing information regarding the reef environment. They have not in the past been sufficiently integrated with other management tools such as permits and plans, and it has been difficult to ensure that educational materials reach the growing number of tourist operators and their staff and visitors. A key achievement of the *Reef Tourism 2005* project has been to greatly fulfil the need for integrated dissemination of materials, made possible the project's combined organisational structure.

#### **Problems with over-reliance on permits**

A management approach based largely on a discretionary permit system was appropriate in the early 1980s, when there were few tourist operators and programs, and a flexible approach to tourism management was called for at a time when the impacts of marine tourism were poorly understood.

However, numerous problems have arisen because of over-reliance on permits to manage the burgeoning marine tourism industry. Briefly, these include (after Dinesen 1995) an escalation in the number and complexity of permits; increased demands on park management resources; administrative delays and duplication as most Marine Park permits are issued jointly with the Queensland Department of Environment; case-by-case assessment without adequate consideration of cumulative impacts; and the fact that permit decisions, and even permit conditions, may be appealed. Other significant problems have also been identified



(Honchin 1996; Williams in press), such as those associated with 'latent' or unused permits, and the present site allocation system based on 'first come, first served' processing of applications.

#### 4.2.3 Review of the Marine Park Permits System

A review of the Marine Park tourist permit system in 1993-94 concluded that there could be no 'quick fix' to the permit system, but rather a combination of other tools and strategies would need to be applied, in an integrated way, to reduce reliance on permits in managing tourism. The review recommendations which have been reported by Dinesen (1995), include: reducing most tourist program permits to simple licences but retaining proper impact assessment procedures for proposals likely to cause significant impacts; greater emphasis on site management and control of use impacts (rather than regulation of user groups targeted through permits); and better use of plans, education, training and Codes of Practice in managing tourism use impacts. A subsequent report by Claridge (1994) identified ways in which management of roving tourist operations and the associated permits could be streamlined.

### 4.3 Recent Initiatives and New Approaches

#### 4.3.1 Management Planning and Policy

Major steps have now been taken to implement the recommendations of the Permits Review Working Group. The *Great Barrier Reef Marine Park Act 1975* has been amended to provide a statutory basis for management plans and to allow for moratoria on new permit applications to be declared while planning is in progress. Planning for the Cairns and Whitsunday regions under this new legislative framework has been progressing well. These key management plans have adopted an issues-based approach, addressing impacts on the natural environment such as anchor damage to coral, and social and cultural issues (previously not adequately addressed) through the provision of settings to better cater for different types and intensity of tourism and other uses (see Honchin 1996; Williams in press). Many tourist permit conditions are to be replaced with Regulations applying broadly to all user groups (including 'as of right' users as well as those requiring permits), which should help to reduce the impacts of use in a more equitable way. At the same time, solutions are being developed through planning processes to problems such as 'latent' or unused permit capacity (Honchin 1996).

The 25 Year Strategic Plan for the Great Barrier Reef World Heritage Area (GBRMPA 1994a) provides a general strategic framework for managing critical issues. However, the effective management of tourism use into the twenty-first century also requires an over-arching tourism strategy and overall policy to address current issues and future growth of the industry on a Reef-wide basis. Following on from the preparation of Draft Management Plans for the Cairns and Whitsunday Sections (anticipated for a mid-1997 public release following legal drafting), the Authority's focus will be to develop the remaining elements of *the Reef-wide Tourism Strategy* in greater detail. A Reef-wide planning approach which sets the strategic direction outside of detailed Management Plan areas is currently being devised. This approach, along with other policy issues, particularly in terms of arrangements for use of public and private moorings, and mechanisms for allocating sites to tourist operators, is being developed by the Authority in consultation with stakeholders and relevant government agencies and is an excellent example of the Partnership Model envisaged.

An important first step in defining this strategic framework has been the development, in consultation with tourism operators, of a *Position Statement on Tourism Use of the Great Barrier Reef Marine Park* (see Appendix B) This Position Statement, which is still in draft form pending adoption by the Marine Park Authority (MPA), sets out the Authority's approach to tourism use and serves as a foundation for the development of planning and management tools and instruments which together will make up the Reef-Wide Tourism Strategy<sup>16</sup>.

<sup>16</sup> The major components of the proposed Marine Tourism Use Management Strategy are outlined in detail in Section 4.

A final decision on the overall strategy, as well as the detailed policy position on the key elements of the new approach, are awaiting the outcome of this Marine Tourism Review .

#### **4.3.2 Monitoring and Research**

The move away from permits as the primary management tool to a more strategic, plan-based approach has also highlighted the need for a better understanding of the cumulative impacts of tourism. Both the ecological and social impacts of Marine Park tourism are being investigated by a number of researchers and institutions, for example through the Cooperative Research Centre for Ecologically Sustainable Development of the Great Barrier Reef (CRC Reef Research Centre), James Cook University of North Queensland, the Australian Institute of Marine Science and the Great Barrier Reef Marine Park Authority.

The marine tourism industry through the Reef 2005 Project in conjunction with the Authority has developed site monitoring systems under the "Eye on the Reef" program. Social monitoring of visitor expectation to ensure visitor satisfaction has also been undertaken by Reef 2005 in association with the CRC.

Cultural issues are also being explored through joint studies with Aboriginal communities, so that the impacts of tourism use on the cultural values and use patterns of indigenous peoples can be more appropriately managed. In addition, while relevant research conducted elsewhere in Australia and overseas is considered highly applicable, it is also acknowledged that monitoring of levels and impacts of tourism use needs to be conducted at a wide range of sites, not just at locations where major facilities such as pontoons are located.

#### **4.3.3 Community Involvement**

The need for wider community involvement in management of the Marine Park and World Heritage Area has emerged, both in relation to identification of issues affecting stakeholders, long-term planning, and management decision-making concerning tourism and other issues. In recognition of the community' demand for greater involvement, various stakeholder liaison groups have been established to facilitate communication and participation. These include: Councils of Elders of Aboriginal communities concerning indigenous involvement in planning and management generally, as well as traditional hunting matters; Regional Marine Resource Advisory Committees consisting of a cross-section of local stakeholders including local tourism industry associations.

#### **4.3.4 Education and Training**

It is generally agreed that if the people involved in the activity which has been regulated, understand the rationale behind the regulatory objectives, they will be more likely to support them. Educating people in the potentially harmful effects of their activities and how they may best minimise any negative impacts is an effective way of managing the impacts of human use on natural resources.

Increasing awareness and understanding of the natural environment and providing visitors with an appreciation of the Great Barrier Reef World Heritage Area's (GBRWHA) unique and special values are fundamental components to the Authority's charter. Working together with stakeholders and the adoption of an approach which promotes shared responsibilities sets the foundation for management of tourism use in the GBRWHA.

To achieve a more equitable and effective system of managing tourism operations within the Marine Park, the Authority decided (MPA 147/5, 1994) to adopt the following principles as recommended by the Permits Review:

- *Management strategies should move away from a discretionary permit system to a more clearly defined system, with restrictions kept to the minimum necessary to achieve management objectives.*
- *Codes of Practice, training and accreditation should be used to foster and acknowledge environmentally responsible behaviour by operators.*
- *Greater self-regulation by operators...should be encouraged.*

As a result, the Authority has placed a much greater emphasis on education, training and self-regulation as an essential and integrated part of Park management and worked extensively with the tourism industry on the co-operative development of education programs and self-regulatory mechanisms.

### Education and Training Strategy

The Authority's education and training strategy for the tourism industry has been jointly developed by GBRMPA, QDoE and the tourism industry.

The strategy is fundamental to the provision of quality standards in presentation by both management agencies and the tourism industry in meeting World Heritage obligations. The strategy provides a mechanism for implementing relevant objectives contained within the GBRWHA 25 Year Strategic Plan, the GBRMPA Corporate Plan and addresses the environmental training needs of industry.

Although this strategy focuses specifically on the tourism industry it has been developed on an impact/issue driven basis, and thus components of the strategy have application across all user groups with the potential to impact on the reef environment.

Central to this strategy has been the development of an education package which focuses on communicating both legislative and non-legislative aspects of Marine Park management.

- Legislative components include information on management directives such as Regulations, Zoning Plans and Management Plans.
- Non-legislative aspects of the education package include information on how to conduct activities in an environmentally sensitive manner (refer below to Best Environmental Practices) the marine environment and guidelines on how to communicate information visitors.

Fundamental to the success of the Authority's education and training program has been the joint development by industry and management of education and training programs, resource material and the delivery of products.

### Education and Training Package (Marine Park Manual and Videos)

An education and training package has recently been developed by the Authority for Marine Park tour operators. This package contains information considered essential for operators in the Marine Park tourism industry and visitors to the World Heritage Area.

To accommodate the unique nature of employment within the marine based tourism industry, the Education and Training package has been developed in a form which is accessible on board all tourist vessels and shore based offices and which takes into consideration the following employment characteristics of the tourism industry:

- high staff turnover;
- employment of a large number of international staff;
- staff with variable interests in Marine Park matters;
- working long hours and for extended periods at sea; and
- working in geographically isolated areas.

The Education and Training Package consists of a reference folder, staff training videos and interpretive material. Information is presented in a user friendly format, on both legislative

and non legislative aspects of Park management, general reef and interpretive information for tourism staff. Its ring folder design allows for the insertion of information updates.

Videos have been incorporated as an integral part of the package as they provide an effective tool for training, overcoming logistical constraints associated with attending formal courses and are instantly available to provide new staff with essential information. In addition, video's have the advantage of taking people out of a class room setting and showing them how to conduct activities and pass on information to visitors in the field.

The Authority's Education and Training package was launched in August 1996 (as the *Marine Park Manual* for tourism operators) and has been received well by industry. The Authority continues to work with QDoE and the tourism industry in the refinement of this package and to ensure information remains relevant to both the needs of Park managers and industry alike.

#### Higher Level Education and Interpretive Training Courses

In addition to the Education and Training Package, the Authority acknowledges the increasing need for endorsed programs in both marine knowledge and interpretive guide training. These serve a need within industry for vocationally recognised courses and are fundamental to the development of professional industry standards and career pathways for staff.

The Authority has implemented a 'train the trainer' program for tourism staff which focuses on communicating information contained within the Education and Training Package face-to-face with tourism staff. In addition, management agencies continue to work with the tourism industry in the establishment of recognised professional standards in education and training for Marine Park tour operators as the basis for an accredited guide system. It is intended that these courses will be developed jointly with industry, be flexible in delivery, have sustainability.

#### Proposal for a Professional Marine Accredited Guide System

More recently, the Low Isles Preservation Society (LIP's) proposed the development and implementation of a Professional Marine Accredited Guide system. This multi-level guide system aims to provide people working in the Marine Tourism industry with top class information and training in the conduct of activities in the marine environment. Courses focus on education, interpretation and the conduct of activities with minimal impact to the natural environment. LIP's believes the 'Marine Accredited Guide System will fill the gap between conservation management and the demand for access in an ever increasing nature based tourism industry'. LIP's have recently completed a discussion paper on the proposed system and are consulting with industry and the Government on its further development.

### **4.3.7 Best Environmental Practices, Codes of Practice and Industry Self Regulation**

In accordance with recommendations from the Permits Review and to affect a more collaborative and interactive approach to management between government and industry, the Authority has been involved in negotiation with industry to promote shared responsibility and encourages greater use of self-regulatory mechanisms and joint management agreements.

#### Recent Developments Within Industry

The development of a Code of Practice for Marine Park Tour Operators was initially raised by the Association of Marine Park Tour Operators (AMPTO) in 1990 in relation to the establishment of an 'Approved Operators System'. AMPTO proposed that an accreditation system should be developed where an operator on meeting a set of defined criteria would automatically register as an 'Approved Operator'. Operators could use this approval (signified by an 'Approved Operator' logo) in their advertising and this would promote quality

standards in professionalism throughout the industry. Although the concept had the support of both GBRMPA and more broadly of industry the Approved Operator system was never developed beyond a proposal by AMPTO.

Since then, a number of industry associations have developed and implemented Codes of Practice. The Cod Hole And Ribbon Reef Operators Association (CHARROA) & the Cairns Professional Game Fishing Association (CPGFA) were the first two associations to develop Codes of Practice for their members. These Codes address anchoring and share mooring arrangements, visitor education and conservation practices. Similarly the Douglas Marine Tour Operators Association (DMTOA) and the Queensland Charter Vessel Association (QCVA) have also developed Codes of Practice for members. These Codes address transport, manning and broader industry standards for professionalism in addition to environmental considerations.

The Whitsunday Bare Boat Operators Association (WBBOA) are currently working closely with the Authority in the development of joint agency-industry standards for bare boat operators. These standards set out minimum requirements to become an 'accredited' bare boat operator. It is proposed that these standards will be used in conjunction with current legislative requirements to assess eligibility for the issuing of future permits.

It should also be noted that in addition to Codes developed by the Marine Park Tourism Industry a number of Codes of Practice have recently been developed by the Queensland Departments of Workplace Health and Safety and Transport with the marine tourism industry. These Codes address a number of diving and transport related issues affecting the industry.

Reef Tourism 2005 (representing the majority of Marine Park tour operators in the Cairns section of the Marine Park) has recently developed a Code of Practice associations and numerous operators in the Cairns Section in cooperation with regulatory bodies. The Code incorporates ethics and Best Environmental Practices designed to minimise negative environmental impacts and maintain the highest standard of client service, maritime practice and safety. The Code has been prepared to a stage where it is ready for trialing by industry. Reef Tourism 2005 believes industry trials are critical to the successful implementation of the Code and to achieve a real level of compliance by tourism operations and the on-water staff.

#### Recent Developments Within GBRMPA & QDoE

The concept of AMPTO's Approved Operators System was agreed to in principle by the Authority in December 1990. At that time it was suggested that a system of accreditation in which operators may be accredited as meeting a higher standard than that required by the permit system also be considered.

Following AMPTO's original proposal, in 1992 the GBRMPA recommended the development of a set of standards, contained within an industry code of practice, for permitted tourist operators. The Authority stated that a set of standards agreed to by management and industry would be beneficial as an indication of effective industry self regulation.

In February 1993 the Authority met with AMPTO to discuss the development of a Code of Practice for Marine Park tour operators. At this meeting it was decided that in the development of a Code there were two priorities:

- For the Authority to identify at what level the Code was to function in the management framework; and,
- For AMPTO to establish what role industry saw the proposed Code fulfilling and what the Code should thus include.

To this end, in July 1993 a position paper was produced on where Marine Parks saw a Code of Practice functioning within the management framework. This paper was formulated following extensive consultation with both GBRMPA and QDoE. At the time, it was generally

agreed that the Code should contain standards above and beyond "minimum" requirements to operate and the Code should focus on the *how* to conduct activities aspect of behaviour. It was agreed that permits should continue to deal with the who, where, when and "minimum requirement" aspects of operation.

Since then, a review of the management of impacts of commercial tourism and private recreation in the GBRMP (known as the "Permits Review" Carey Report, August 1993) has been completed. The Review Working Group presented a Report in April 1994 outlining proposals regarding a transformation of the permit system. Key components included the development of Codes, accreditation and industry self-regulation.

Following the Permits Review and as a part of the permits transformation process, two reports were commissioned which addressed the development of Codes of Conduct. Claridge (1994) examined roving tourist operation permits and the development of industry Codes of Practice for this sector and the broader Marine Park tourism industry. Day (1994) looked at concepts for the development of Codes of Practice for the Authority at a more generic level. Findings from these reports were taken into consideration in determining the overall approach to the adoption of self regulatory mechanisms in tourism use management.

#### The Adoption of Best Environmental Practices

It was originally proposed that Codes of Practice be developed with the tourism industry to facilitate self-regulation. However, in deciding how to proceed in the development of Codes of Practice a number of key issues required consideration:

- Whether Codes of Practice should be mandatory and supported by legislation or permit conditions, thus remaining within the regulatory framework and requiring enforcement by management agencies; or,
- Whether Codes should be voluntary and responsibility for compliance rest primarily with industry organisations.
- How Codes of Practice and associated operator accreditation could widely be adopted by the tourism industry.
- Although there exists a range of industry associations there is currently no single, cohesive, representative industry body.
- Operators who are not members of such associations should have access to relevant information on Codes and be given the opportunity to self-regulate.
- To date, some industry self-regulation has occurred for some site and activity specific practices (eg access to shared moorings, briefings on best practices for activities such as diving). This has, however, been in the absence of endorsed standards by management agencies.

Considering these issues, it was proposed that where impacts of activities are potentially high, constraints on such activities should continue to be applied through statutory mechanisms and enforced by the management agencies. Where likelihood of adverse impacts were considered comparatively lower (but nevertheless important for effective management), voluntary guidelines should be developed with industry and other park users to encourage environmentally responsible practices and minimise impacts of use. These guidelines termed *Best Environmental Practices* (BEPs), should be available to all operators (and other park users).

In essence, Best Environmental Practices are:

- guidelines for how to conduct activities with minimum impact on the environment;
- voluntary;
- complement statutory controls where appropriate;
- form part of the Education and Training Package;
- able to be adopted by individual park users and by industry/park user associations;
- equitable in their application across all Marine Park users and ensure consistency in standards of practice throughout the Marine Park.

The Authority has worked closely with the tourism industry and more broadly with other Park users in the development and ongoing refinement of Best Environmental Practices. Promotion of Best Environmental Practices is facilitated primarily through the Education and Training Package.

#### Codes of Practice and Industry Self Regulation

As a part of the approach to encourage greater self regulation, industry and other Park user associations are encouraged to formally incorporate relevant Best Environmental Practices into *Codes of Practice*. Such Codes may consist of only Best Environmental Practices, or may cover a wider range of operational issues (eg service standards) of importance to industry but not relevant to Park management requirements.

The Authority believes that compliance with Best Environmental Practices and Codes of Practice are primarily the responsibility of industry, rather than the management agencies. This approach promotes shared responsibility amongst Park users and fosters a spirit of self-regulation. It also ensures that management agencies' resources are focused on ensuring compliance with statutory measures necessary to manage the impacts of use on the Marine Park.

In the future, the Authority sees the development of accreditation schemes as an important step in providing an additional incentive for individual operators to comply with Best Environmental Practices and/or Codes of Practice and to gain recognition for doing so. It is proposed that the approach adopted will be complementary to other accreditation schemes operating such as the National Ecotourism Accreditation Scheme.

The development of Best Environmental Practices and their subsequent inclusion in industry Codes, is seen as an important pathway to provide industry with the opportunity to self-regulate. Attachment 1 provides an overview of the Education and Training Package and the relationship between Best Environmental Practices and Codes of Practice.

#### **4.4 Proposed Strategy for Managing Marine Tourism Use**

The rapid growth and the changing nature of Marine Park tourism have increasingly challenged the Authority to reconsider its approach to managing marine tourism use impacts. In order to more effectively manage tourism use in the Marine Park, the Authority is implementing a number of changes to its management regime. These changes are in all areas of management and are being developed and refined in consultation with the marine tourism industry and other stakeholders. It is intended they be introduced in a coordinated way to make the transition as smooth as possible.

The major components of the Authority's proposed approach to managing marine tourism use will be:

- strategic planning: where a clear strategic direction is established for the management of marine tourism use in the Marine Park;
- regulatory mechanisms: where the Authority establishes well-defined, enforceable and effective management controls to protect the values of the Marine Park;
- self-regulation by the industry: where the Authority encourages, assists and promotes environmental responsibility and professional presentation of the Reef within the marine tourism industry; and
- active partnerships: where the industry and other stakeholders are encouraged to be active partners in Marine Park management.

##### **4.4.1 Strategic Planning**

The Authority is developing a *Reef-wide Plan for Managing Marine Tourism Use* which will establish a clear strategic direction for the Marine Park. This Plan will:

- identify natural, cultural, heritage and use values which could potentially be affected by tourism;



- define the management requirements necessary to protect these values;
- define areas appropriate for different settings of marine tourism use; and
- establish limits to marine tourism use where necessary.

This Reef-wide Plan will be an overview for all areas of the Marine Park and will form the strategic basis of much of the future management of marine tourism use. It is currently being prepared by the Authority in consultation with the Department of Environment, the marine tourism industry and other major stakeholders and is planned to be released for public comment during the second half of 1997. It is expected to be finalised in 1998.

The Reef-wide Plan will be implemented through amendments to legislation, statutory plans of management, changes to policy and education.

Management of areas in the Marine Park which are intensively used or have specific management needs will be more fully defined through *statutory Plans of Management*. These Plans will introduce management strategies such as:

- use settings,
- numerical limits for some sites and access rights,
- categories of tourist operators which may operate to particular sites (based on historical use), and
- a booking system for access to sensitive sites.

The Plans for the Cairns and Whitsunday areas are currently being prepared by the Authority with extensive public and stakeholder input and comment and are expected to be finalised around mid-1997.

Statutory Plans of Management will be prepared for other areas of the Marine Park as required (for example the Capricorn/Bunker area), reflecting the general management intentions of the Reef-wide Plan.

#### **4.4.2 Regulatory Mechanisms**

Once the statutory plans of management have been finalised for the Cairns and Whitsunday areas, it will be possible to *simplify the permits* issued for the operation of tourist programs in those areas. This is because many of the management concerns currently addressed in the permits will be taken into account in a statutory plan.

The next step will be the introduction of a simpler *licensing system* for most tourist programs throughout the Marine Park. However, the adoption of a licensing system is dependant on the development of the Reef-wide Plan, and on much of the management control currently contained in permits being transferred as necessary to zoning plans, regulations, statutory plans of management, industry codes of conduct and a reef operator manual. It is envisaged that there will be a range of standard licences which will match most of the tourist operations in the Marine Park, for example:

- occasional rovers;
- regular rovers;
- daily site use; and
- bareboat operations.

The licensing system will streamline administration while improving management of cumulative impacts. It will also be a significantly simpler, more flexible and more easily understood system for tourist program operators, as well as making it easier for operators to transfer permits. The licensing system will be developed in consultation with the Department of Environment and the industry and may be linked to the introduction of the Reef-wide Plan or developed separately.

*Individual assessment and permitting* will be retained for large-scale marine tourism use proposals and proposals which represent something new and different which cannot be dealt with in class assessments.



The Authority will review its *site allocation process* to ensure that any sites or activities which are limited are allocated in a way that is clear and fair to all.

In consultation with industry and other stakeholders, the Authority will also be developing a management framework to help make decisions about the continuation, transfer or renewal of tourist program permits and licences. One aspect of this may be the development of an *accreditation scheme* for marine park tourism operators, another may be the development of a system of *performance monitoring*.

#### **4.4.3 Self-regulation by Industry**

The Authority is working with the industry to encourage and facilitate greater *self-regulation* for some aspects of their tourist program operations. For example:

- through assisting industry to develop and adopt industry of *codes of conduct*;
- through educating operators and visitors about the *best environmental practices* which should be employed in the Marine Park and encouraging industry to adopt these practices; and
- through assisting industry to maintain a high standard of presentation, interpretation and education techniques through staff training programs, and the development of education and interpretive material.

The Authority is also working with the marine tourism industry and other stakeholders to develop a system of *accreditation for marine park guides and operators* where personnel would be professionally trained and their qualifications officially recognised.

#### **4.4.4 Active Partnerships**

The Authority will give a high priority to developing active partnerships with the marine tourism industry and other stakeholders concerning the management of marine tourism use in the Marine Park. The Authority will encourage and help the marine tourism industry and other stakeholders to become involved in the management of marine tourism use, as well as informing them of their roles and responsibilities.

It is expected that *consultation and negotiation* will play an important role in developing future management strategies for marine tourism use in the Marine Park.

SECTION FIVE:  
CONSULTATIVE MECHANISMS  
BETWEEN THE GBRMPA  
AND THE GBR  
MARINE TOURISM INDUSTRY

## **5.0 CONSULTATIVE MECHANISMS**

### **5.1 GBRMPA Broad Consultative Framework**

The Great Barrier Reef Marine Park Authority's approach to consultation and liaison with the marine tourism industry sits within a broader consultative framework which recognises there is a wide range of stakeholders with an interest in the protection, use and management of the Marine Park and World heritage Area.

The Authority has established consultative processes and programs with a range of stakeholder groups including Aboriginal and Torres Strait Islander people, conservation interests and fishing sectors.

#### **5.1.1 The Great Barrier Reef Consultative Committee (GBRCC)**

The Great Barrier Reef Consultative Committee, established by the Great Barrier Reef Marine Park Act, is an independent advisory body for both the Minister and the Authority. The consultative committee represents a wide cross section of interests from both the public and private sectors - including tourism, fishing, science, conservation, local government and aboriginal communities.

It consists of members appointed to the Minister for a three year term and a member of the Authority is appointed by the Authority for an indefinite term. The committee ceased on the 15th August 1996 and news of new appointments by the Minister is awaited.

Although the Great Barrier Reef Consultative Committee typically consists of 2-3 members with expertise in tourism, it has no formal linkages with the broader Marine Park Tourism Industry.

#### **5.1.2 Regional Marine Resource Advisory Committees**

During 1992 and 1993 GBRMPA sponsored an extensive range of workshops with both commercial tourism operators and recreational user groups along the Queensland coastline. At these meetings strong support was expressed for the concept of regional advisory groups to assist the Authority in carrying out its charter and in meeting World Heritage Obligations giving "the Great Barrier Reef World Heritage Area a function in the life of the community" (World Heritage Convention, 1983).

In response to these requests the Authority began to establish Regional Marine Resources Advisory Committees (RMRACs) in major regional centres along the Queensland coastline in 1994. The structure of the group varies in regional centres to suit the needs of different local communities, but usually comprise of at representatives from the tourism industry, recreational and commercial fishing sectors, conservation interests, Aboriginal and Torres Straits Islander interests, local Authorities and specific interests groups (recreational diving, shell collecting clubs etc). As of November 1996, 11 RMRACs were operating in regional centres along the Queensland coastline.

The committees are community driven. They examine local issues and operate on a consensus basis. The primary goal of these committees is to provide advice on marine resource issues to local management agencies and to formalise communication links between management agencies, local interest and user groups.

The RMRACs have been found to operate well when addressing issues which impact across a range of stakeholder groups. They have operated extremely successfully during planning processes in the Cairns/Port Douglas and Whitsunday areas, providing a forum where representatives from different sector and interest groups can put forward and discuss their views. The majority of tourism associations have representatives which sit on RMRACs.

The Regional Advisory Committees have been invaluable in increasing understanding and raising awareness of the range of different perspective's and views held by user and interests groups. They are providing an increasingly important role in the identification and

resolution of issues at a regional level and in building linkages between a diverse group of interests which previously operated in isolation to one another. The establishment and successful functioning of the RMRACs is reflective of a more integrated approach and community based approach to Park management.

### **5.1.3 Non-tourism Consultative Structures and Processes**

The Authority has established consultative processes and programs with a range of stakeholder groups including Aboriginal and Torres Strait Islander people, conservation interests and fishing sectors.

The Authority works closely with indigenous people through a range of representative structures (including Land Councils, Councils of Elders and with delegated community representatives) and formal and informal consultative processes.

The Authority is currently in the process of formalising consultative arrangements with conservation interests and is working with Non-Government Conservation Organisations (NGCOs) to develop a MOU detailing guidelines for consultation and liaison arrangements. At an Authority workshop held in April 1997, NGCOs recently formed six issues based working groups to focus on a range of specific management issues including tourism.

Consultative arrangements with the commercial fishing sector have been formalised through the development and implementation of Memorandum of Understanding between the Queensland Commercial Fishing Organisation (QCFO) and the Authority and through the Authority's involvement on zonal and management fishing advisory committees (ZACs and MACs).

At this stage there are no formal processes in place to link the various sectorial consultative arrangements except on an 'as needs' issues specific basis and at a regional level on RMRACs and through the GBRCC.

## **5.2 Consultation and Liaison Arrangements with the Marine Park Tourism Industry**

The Marine Park tourism industry is the single largest industry sector using the Marine Park and is the primary means by which the Great Barrier Reef Marine Park Authority (GBRMPA) meets its obligation to effectively present the Great Barrier Reef World Heritage Area (GBRWHA). Clearly the tourism industry has an increasingly significant role to play in Marine Park management.

The rate of growth within the industry and increasing levels of use more generally, are making it more difficult and less effective to liaise with individual operators on issues affecting the tourism industry as a whole. As the industry continues to develop, the needs and issues associated with the industry need to be addressed in a strategic, coordinated and systematic manner at regional, sector specific and Park-wide levels.

### **5.2.1 Background**

Despite the formation of a number of marine tourism associations over the last decade, there is still no cohesive and formal structure for interaction between the Authority and the Marine Park tourism industry as a whole. While this is largely due to the fragmented nature of the marine tourism industry, cohesion was not encouraged by the Authority's previous approach to tourism use management, which although effective for managing low levels of use in the Marine Park, resulted in:

- limited contact with the tourism industry outside of the periodic development of Zoning Plans or dealing with individuals on permit matters;
- limited and poorly defined role for groups including tourism industry associations apart from 'one-off' issues, such as the introduction of the Environmental Management Charge. (The current permit system only allows consultation to take place on a one to one basis,

- and Zoning processes address a broad range of issues across all stakeholder groups); and
- limited ability to respond to changing needs of both managers and industry beyond an individual permit level or the 5-10 year planning framework governed by the cycle of Zoning reviews.

### **5.2.2 Implications for Consultative Arrangements with Industry of Changes in Marine Park Tourism Use Management.**

In response to the rapid growth, increasing sophistication and high profile of the Marine Park tourism industry there has been an increasing awareness within both the tourism industry and the Authority that a more dynamic and responsive approach to tourism management is required, which addresses the cumulative as well as the individual impacts of tourism use on World Heritage values.

As a consequence, the Authority is moving away from periodic review mechanisms such as Zoning Plans and individually tailored permits to a more strategic, issues based approach, in accordance with principles of the 25 Year Strategic Plan, and taking into account cultural and socio-economic considerations, as well as environmental issues.

In terms of consultative arrangements this approach provides:

- an ongoing role for industry in management, with industry's involvement in the identification and resolution of issues on a continuing basis, central to the success of a more responsive and flexible management system;
- greater flexibility in the use of management tools with increased opportunities for co-operative and/or joint management arrangements between industry and the Authority;
- greater transparency and accountability of process with all stakeholder groups being aware of their role in the management framework and decision making processes;
- the opportunity for industry and community groups to become involved and informed in a more meaningful way as active participants in management; and,
- encouragement for industry and other stakeholder groups to work more closely with one another and the Authority in the adoption of an integrated approach to Marine Park management.

For this approach to be effective it was recognised that better liaison arrangements and working relationships between the Authority and the tourism industry were required to identify and resolve issues and jointly implement management solutions.

As there were no effective formal mechanisms in place which enabled the Authority to work with industry at a strategic level, a workshop was convened in May 1996 with key players from the tourism industry to discuss changes in management approach and consultative arrangements between the Authority and the Marine Park tourism industry. Fundamental to discussions on consultative mechanisms was the recognition by participants that:

- tourism is the largest and fast growing single sector of use of the GBRMP;
- although the Authority's prime concern is to manage the effects of *tourism use* rather than the *tourism industry per se*, the Authority recognises that it's decisions can dramatically affect the industry, and no other agency is responsible for actively managing GBRMP tourism use as a whole;
- the Authority devotes significant resources to managing tourism use and conversely, the industry devotes significant resources individually and through Associations to liaising and negotiating with GBRMPA.
- the need for liaison is likely to continue to increase substantially as the tourism industry develops; and
- the Authority's obligation to present the World Heritage Area is essentially compatible and consistent with the commercial imperatives of the tourism industry. However, the opportunities presented by this apparent commonality of interests, and the means by which the opportunities can be realised need to be explored in detail with the Marine Tourism industry as an entity.

At the workshop participants acknowledged the vital role of local and regional bodies in reflecting the diverse nature of the marine park tourism industry and believed that no one peak body was able to represent all industry views. Participants agreed to the need for:

- informed opinions on strategic issues;
- balanced representation across all Marine Park tourism interests;
- the establishment of formal Register of Associations;
- the appointment of a Tourism Use Coordinator (as a single point of contact for industry) within Great Barrier Reef Marine Park Authority; and,
- the formation of a competency based advisory body to look at GBRMP strategic tourism use management issues.

### **5.2.3 Register of Tourism Interests**

In accordance with outcomes of the May 1996 Tourism Use Management workshop the Authority established a formal Register of Tourism Interests to identify which interests in the tourism industry are represented by Associations and which interests lack collective representation.

This Register is used to assist the Authority in the development of consultative arrangements for specific management issues and more broadly in ensuring the needs of all Marine Park tourism sectors and interests are addressed in management processes.

Associations are requested to provide the Authority with the following information as the basis for formalising working relationships:

- Constitution or Articles of Association (or if unincorporated Association objectives and a brief description of the Association's charter).
- Current Membership list including committee members.
- Contact person/s for discussing Marine Park issues.
- Any information relating to the role and function of the Association relevant to Marine Park management (eg. Codes of Practice, Operational Procedures, Dispute Resolution Mechanisms etc).
- Information on mailing lists for newsletters or Association updates where appropriate.
- Updates on any relevant changes regarding the Association on an annual basis.

### **5.2.4 Memorandum of Understanding**

The development of a Memorandum of Understanding (MOU) between GBRMPA, QDoE and the Marine Park tourism industry Associations and Operators was initiated in 1996 as the basis for formalising consultative processes and cooperative arrangements between Marine Park managers and the tourism industry. The MOU details principles and protocols for consultative arrangements and addresses conservation, cultural, social and economic considerations.

The MOU is not a legally binding document, but an expression of goodwill between parties, developed to assist in the formation of effective liaison arrangements and to strengthen working relationships between Marine Park managers and the marine park tourism industry. It currently exists in draft form and has the approval of the GBRMPA, QDoE and the Tourism Advisory Group (see below).

### **5.2.5 Tourism Advisory Group (TAG)**

In accordance with recommendations from the May 1996 workshop on tourism use management and consultation, the GBRMPA established a non-statutory competency based Tourism Advisory Group (TAG) in January 1997.

This Group was established as an interim body to provide advice at a strategic level on a range of Marine Park and tourism issues including management proposals dealing with Park-wide planning, streamlined licensing and permitting systems. The structure and functioning of this group is to be revised in July 1997 in line with recommendations from this review on tourism consultative structures.

At the first meeting of the TAG, members agreed to:

- assess the state of planning and of the program of changes in the permit process for the GBRMP;
- identify issues important to the management of tourism use; and,
- assist, through the GBRMPA, the management of tourism of the GBR recognising that other interests are involved (Minutes 1st TAG Meeting).

To date, discussions and recommendations from the TAG have focussed on:

- advice on the Authority's draft position paper on tourism use management;
- the development of the draft Memorandum of Understanding between the GBRMPA, QDoE and the Marine Park tourism industry associations and operators;
- latent capacity issues;
- limits to use and sensitive sites;
- moorings and site allocation;
- duration of permits/licences ('tenure');
- proposals for a Park wide planning approach to tourism use management; and,
- proposals for a new licensing system including types of licence, eligibility and performance criteria.

Initial feedback from both the Authority and industry members sitting on the Advisory Group, is that the Group is working well. From an Authority perspective the Group is providing valuable assistance in helping to progress proposals dealing with Park wide planning and permitting issues. From a tourism industry perspective, the establishment of the Advisory Group provides greater transparency and accountability of process regarding tourism use management. It also provides industry with a forum where it can table and address industry concerns.

Draft Terms of Reference outlining the Group's function and structure and role in the broader consultative framework are provided in Appendix C.

### **5.2.6 Linkages to the Broader Tourism Industry**

The purpose of the Tourism Advisory Group is to complement existing consultative forums and networks and wherever possible to provide links, interact and enhance established consultative processes.

The Tourism Advisory Group functions at a Park-wide strategic level and is intended to complement, not duplicate or replace existing consultative processes operating at regional, sector-specific and local levels. The Authority continues to work closely with individual tourism associations and to liaise with operators through the Authority's quarterly Reef Connections tourism newsletter and through the conduct of regular meetings and workshops on Marine Park issues.

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### TOURISM REVIEW - TERMS OF REFERENCE

A strategic approach to the future management of tourism use of the Great Barrier Reef is being developed, within the context of the broad strategic directions for the management of the Great Barrier Reef Marine Park and World Heritage Area, biological conservation, Aboriginal and Torres Strait Islander, and use values. A key part of this process is a review of Marine Park tourism, which will:

1. Review information available on the scope and extent of tourism operations in the Great Barrier Reef Marine Park (GBRMP) and its relationship with the broader economy.
2. Review information available on the environmental, social and economic impacts of tourism use in the GBRMP.
3. Outline current and proposed strategies and mechanisms for managing sustainable tourism use.
4. Recommend strategic tourism use policy and management mechanisms, particularly in relation to resource allocation (*broad scale*), latent capacity, site allocation (*sites for individual operations*) and permit security, which will:
  - a) provide for the ecological sustainable management of tourism
  - b) maintain tourism values and desired settings for use
  - c) maintain tourism industry viability, competitiveness and diversity and provide opportunities for a range of experiences;
  - d) ensure quality standards in presentation of World Heritage values; and
  - e) Ensure tourism use is consistent with the Great Barrier Reef Marine Park Authority's obligations for protecting World Heritage, conservation, Aboriginal and Torres Strait Islander and use values in the GBRMP.
5. Recommend effective consultative mechanisms and processes for the Great Barrier Reef tourism industry which meet the needs of both the industry and government.

The review must be conducted in accordance with the objectives of the *Great Barrier Reef Marine Park Act 1975* and be consistent with the need to ensure protection, conservation and presentation of the Great Barrier Reef World Heritage Area.

The review will draw upon the recommendations arising from the review of GBRMPA conducted by Ron Brown and pay particular attention to work conducted under the Reef Tourism 2005 project. The review will also have regard to activities already being undertaken by GBRMPA in relation to tourism on the GBR, especially in regard to changes to the permit system, and will provide appropriate input into these processes.

To facilitate effective and efficient consultation a steering committee will be formed to oversee the review. Representatives will be drawn from the Marine Park tourism industry, key stakeholder interest groups and Commonwealth and Queensland Government agencies associated with tourism and environment and heritage management.

In developing recommendations on the strategic tourism use management policy and consultative mechanisms, there will be close consultation with the tourism industry, Marine Park stakeholders and Government.

A final report is to be provided to the Minister for the Environment and the Minister for Industry, Science and Tourism by 30 June 1997.

**Draft Great Barrier Reef Marine Park Authority Position Statement on  
Tourism Use of the Great Barrier Reef Marine Park**

**1. Basis of Marine Park Management:**

The Authority's approach to management of the Great Barrier Reef is founded on the following vision in the 25 Year Strategic Plan for the Great Barrier Reef World Heritage Area, in accordance with Australia's obligations to ensure the protection, conservation, presentation and transmission of the Area.

**In the Great Barrier Reef World Heritage Area in 25 Years there will be:**

**A healthy environment:** an Area which maintains its diversity of species and habitats, and its ecological integrity and resilience, parts of which are in pristine condition.

**Sustainable multiple use:** non-destructive activities consistent with GBRMPA's statutory and World Heritage properties obligations, which can continue forever, that is, in such a way that maintains the widest range of opportunities for sustainable use, and does not adversely affect the ecological integrity of its natural systems.

**Maintenance and enhancement of use:** the continuation and enhancement of diverse aesthetic, ecological, economic, cultural and social values, providing for the aspirations of residents, users, Aboriginals and Torres Strait Islanders and the global community.

**Integrated management:** management of activities which takes into account the ecological relationship between the Area and other adjacent areas, particularly the mainland.

**Knowledge-based but cautious decision making in the absence of information:** decisions based on a commitment to research, monitoring and review using data and experience from all sources and erring on the side of caution in the absence of information.

**An informed, involved, committed community.**

Management of the Great Barrier Reef Marine Park and World Heritage Area will be undertaken according to the 25 Year Objectives and Broad Strategies laid down in the Strategic Plan. In carrying out its management responsibilities, the Authority will be guided by the following principles.

**Nature Conservation**

- Protection of the natural values of the Great Barrier Reef World Heritage Area will be the primary concern of the Authority.
- Rare, depleted, threatened and endangered species and communities, together with their critical habitats, will be protected.
- Use practices which threaten the natural values will be effectively managed, and some areas, representative of the variety of communities and habitats found in the Area, will be maintained free from human use.

**Maintaining a Cultural Landscape**

- Management will recognise that the Great Barrier Reef evolved in the presence of Aboriginal people; and will enable Aboriginals and Torres Strait Islanders to pursue their own lifestyles and cultures, and have the responsibility for areas and resources relevant to their heritage, within the bounds of nature conservation and ecologically sustainable use.
- Sites of historical significance will be preserved, and, if appropriate, interpreted.

**Presentation and Use Management**

- The Authority will provide for a diverse range of use opportunities, consistent with World Heritage obligations, nature conservation, cultural & heritage values and presentation principles.

- High standards in community education and presentation of World Heritage Area values will be maintained, including the provision of relevant education, training and interpretive materials.
- Impacts of use will be managed to maintain nature conservation, cultural, heritage, use and community values, and will take into account individual and cumulative impacts of use on the World Heritage Area.
- Decision-making concerning use of the Area will involve affected use groups and stakeholders and will take into account information gathered from public participatory processes.

## **2. Presentation of the Great Barrier Reef World Heritage Area:**

The Authority:

- believes that the Marine Park tourism industry is the primary vehicle for the presentation of the Great Barrier Reef World Heritage Area;
- recognises that the Marine Park tourism industry is able to facilitate presentation in accordance with Australia's international obligations under the World Heritage Convention; and
- will work with the Marine Park tourism industry to apply world's Best Practices and standards to achieve this role.

## **3. Basis for Consultation Processes:**

In consulting with any interest group on management of that group, the Authority will ensure reasonable opportunity is given for participation by other affected interests and the public:

- recognising that the Marine Park is a publicly managed and owned natural resource and its management is of interest to the public generally; and
- recognising multiple use of the Marine Park and the likelihood that any use may impact on other users; and
- recognising that Memoranda of Understanding have been agreed between the Authority, other management agencies and with stakeholders;

therefore the Authority will continue to:

- develop consultative structures and working relationships with the tourism and other industries and Marine Park stakeholders at large;
- ensure significant management decisions are appropriately developed in consultation with tourism industry, other interest groups and the broader community.

## **4. Recognition of the economic significance of the Marine Park Tourism Industry:**

The Authority recognises that:

- the existing Marine Park tourism industry is a major economic use of the natural resources of the Marine Park and Great Barrier Reef World Heritage Area;
- the existing Marine Park tourism industry is economically significant at local, regional, state and national levels; and
- the existing Marine Park tourism industry represents major national and individual investment.

## **5. The Authority's Approach to Tourism Use of the Marine Park and World Heritage Area**

The Authority believes that:

- tourism use of the Marine Park can be effectively managed to have no unacceptable impacts on the values of the Marine Park and Great Barrier Reef World Heritage Area;
- tourism is a reasonable use of the Marine Park;
- tourism can be a desirable use of the Marine Park when it promotes awareness and understanding of the Great Barrier Reef and Marine Park, if it is conducted to achieve the aims of World Heritage Area listing and if the effects of its use are environmentally acceptable;
- in order to be able to promote understanding and appreciation of the Marine Park and Great Barrier Reef World Heritage Area, a Marine Park tourism industry must be:
  - professional;
  - diverse;
  - informed;
  - economically sustainable;
  - able to be commercially competitive internationally; and

- . recognised as practising world best standards;
- most tourism activities can be managed through regulation, education and encouragement of self-regulation to be environmentally acceptable, to promote understanding and awareness of the Great Barrier Reef, the Marine Park and the Great Barrier Reef World Heritage Area;
- there is a high standard of environmental awareness, desire to conserve the environment and to promote appreciation of the Great Barrier Reef within much of the existing tourism industry;
- there is a substantial and growing awareness within much of the existing Marine Park tourism industry that economic sustainability and the competitiveness of the Marine Park tourism product rely on sound environmental management; and
- there is a growing awareness that the World Heritage values of the Great Barrier Reef World Heritage Area can be of significant value to the Marine Park tourism industry.

therefore the Authority will:

- encourage the development of a viable, nature-based tourism industry that encourages appreciation and enjoyment of the natural qualities of the of the Great Barrier Reef with minimal disturbance of those qualities;
- work with the tourism industry and other stakeholders with the aim of defining and achieving strategic goals for a Marine Park tourism industry;
- continue to develop with the tourism industry and other stakeholders a system of managing the Marine Park tourism industry that incorporates, as appropriate: minimum necessary regulation, effective education and responsible self-management; and
- work with the tourism industry and other stakeholders to develop a system of officially-recognised accreditation for operators and staff to promote high standards of environmental care, industry professionalism and informed use of the Marine Park by the tourism industry.

## **6. Implications of Managing Tourism Use of the Marine Park**

The Authority recognises that:

- the Authority is effectively the agency most involved in the regulating tourism activities in the Marine Park;
- its functions, obligations and principles require the management of the effects of the use of the tourism industry; but
- that management actions may have economic implications for the tourism industry; and
- it is primarily established as, and set up as, an environmental management agency;

therefore the Authority adopts the following positions:

- Economic management of the Marine Park tourism industry:
  - . while recognising that its management actions may have economic implications, the Authority does not consider economic management of the tourism industry to be within its primary role or fields of expertise;
- therefore:
  - . where major economic implications are evident arising from its actions, the Authority will seek advice from relevant agencies, experts and industry to guide its decisions; and
  - . the Authority will seek discussions with relevant agencies, experts, the tourism industry and other stakeholders with the aim of defining a strategic policy on economic management of the Marine Park tourism industry.
- Economic competition:
  - . the Authority will maintain primacy of environmental considerations; but
  - . will consider the effects of its management policies on economic competition; and
  - . will endeavour to ensure that competition is encouraged providing that it is consistent with effective management of the Marine Park and Great Barrier Reef World Heritage Area.
- Exclusive use of Marine Park resources:
  - . in principle, the Authority does not endorse the grant of exclusive use of Marine Park resources to individuals; but
  - . notes that the defining of acceptable levels of use or the imposition of management requirements may on occasion result in use that is effectively exclusive.

## **7. Determining limits to use of the Marine Park:**

The Authority recognises that:

- the Marine Park is a finite natural resource and the level of acceptable use of the resource is also finite;

- use of the Marine Park tends to be spatially concentrated around population centres, creating different pressures on natural resources within different parts of the Marine Park;
- some environments in the Marine Park have lower thresholds of acceptable use than others;
- exceeding an acceptable level of use may not be apparent until major and possibly irreversible changes occur, therefore the Authority will be guided by the precautionary principle in managing use;
- conclusive evidence that an acceptable level of use has been exceeded, or that damage can be attributed to a discrete cause, usually requires long-term research and monitoring, the results of which may only become available once damage has occurred;
- the Authority's obligations require that limits to use must be less than those likely to cause significant and irreversible ecological changes;
- orderly and proper management of the Marine Park for multiple use, and to maintain World Heritage Area values, requires setting limits to use to maintain cultural, heritage and use values as well as bio-physical values;
- reducing an existing level of use to an acceptable level of use may in certain instances require disruption of existing uses;

therefore the Authority adopts the following positions:

- where a need exists, limits to use will be set in consideration of the effects use may have on, in order of priority:
    - . the ecological or bio-physical environment:
      - : special care must be taken to protect threatened species, significant habitats or representative areas; and
      - : generally to maintain the health, dynamics and character of the natural resources of the Great Barrier Reef World Heritage Area, the Marine Park overall and at individual places;
    - . the social and cultural environment: in particular to avoid unacceptable levels of displacement of reasonable existing use by proposed new use, to maintain cultural and heritage values and to protect the Great Barrier Reef as a unique natural environment;
  - limits to use will be set on best available information, the precautionary principle, World Heritage Area objectives, the need to maintain future options and capacity to manage use effectively;
  - limits to use will be set according to the issue to be addressed, and may include, for example, numbers of visitors to islands or cays, numbers of moorings at reefs or numbers of vessels at some places;
  - recognising that ecological, social and cultural environments change over time, any limits to use set must also be flexible over time, requiring periodic evaluation of limits to use;
  - the needs of the ecological or bio-physical environment are pre-eminent and will be determined as far as possible through scientific research and monitoring;
  - the needs of the social and cultural environment will be determined as far as possible through public consultation processes, with the aim of developing consensus but recognising that many outcomes will be compromises developed from balancing competing interests;
  - where the outcomes of a decision by the Authority are likely to affect stakeholders, opportunities will be provided for comment by all affected stakeholders and, where appropriate, the public at large;
  - when the level of use of a resource is determined as likely to be exceeding the capacity of that resource, the Authority will, in principle:
    - . seek changes in the conduct of activities so that they are less likely to impact on the resource;
    - . manage the level of use to more closely align with that which is more likely to be sustainable, including re-location and control of potential but un- or under-used capacity if appropriate and feasible;
- recognising:
- . the primary need to ensure ecological sustainability;
  - . that most situations of this type will need to be individually determined on the unique characteristics of the situation; and
  - . the needs and wants of, and commitments made to and by, individuals affected.

## **8. Allocating Use in the context of setting Limits to Use:**

For areas or activities on which limits to use are set:

- consideration will be given to minimising effects on persons with a history of use to the area or activity, providing that to do so does not negate or unacceptably compromise the reason for imposing the limitations;
- the Authority will generally give preference, in allocating use rights or privileges (eg permissions), to persons with a history of use to the area or activity;
- the Authority accepts a responsibility to continue to provide opportunities for generalised use (including roving tourism use and "as of right" uses not requiring permissions), providing it is consistent with orderly and proper management of the Marine Park;
- the Authority accepts that persons who have been granted a permission to use a specific place, or conduct a specific activity, should have precedence over persons granted a generalised permission to use the resources of the Marine Park that may include use of that specific place or conducting that specific activity.

## **9. Managing Growth in Tourism Use:**

The Authority recognises that:

- the Marine Park tourism industry collectively, and as individual operations, needs the potential to provide a diverse range of services to increasing numbers of tourists;
- the Marine Park tourism industry (collectively and as individual operations) needs the ability to change styles of operations and services offered with changing market demands;

therefore the Authority will:

- when determining limits to use, enable a range of opportunities with capacity for the Marine Park tourism industry overall to grow, develop and adapt, providing that by so doing acceptable limits to use are not compromised:
  - recognising that best flexibility will be achieved through the Great Barrier Reef tourism industry collectively being involved in making best use of the resources within the range of opportunities provided; and
  - noting that a range of opportunities can only be provided on a broad scale, not necessarily to every operation;
- maintain areas suitable for different types of activities and operations, free of activities and operations that could cause unacceptable conflicts;
- adopt management systems for individual operations that allow more flexibility in use of the natural resources of the Great Barrier Reef Marine Park within acceptable limits to use;
- collect statistics relating to those characteristics of use required for management purposes; and
- cooperate with the Marine Park tourism industry, research and tourism agencies in projects and programs to systematically collect data on visitors and visitor characteristics for the Reef and in making this information available in a format that promotes informed development of tourism use and management of the Great Barrier Reef Marine Park consistent with the principles of this Position Statement.

## **10. Contingency Planning for Disasters**

The Authority recognises:

- a range of natural or human-induced events may seriously impact on parts of the Marine Park;
- those events may seriously affect the environmental values on which a part of the Marine Park tourism industry relies in offering nature-based activities and therefore the ability of individual tourist programs to operate effectively within the Great Barrier Reef Marine Park while the environmental values are degraded;
- that in most cases where environmental degradation occurs through a chronic natural or human-induced event, natural recovery of the resource will be the main, if not only, feasible process of rehabilitation; and
- natural recovery of a Great Barrier Reef Marine Park resource is unlikely to occur in a shorter term than two to three years at least;

therefore the Authority will:

- as far as possible, plan for use within an area of the Great Barrier Reef Marine Park to retain opportunities for re-location of tourist programs, either temporarily while a seriously degraded resource recovers or for a longer period if that is appropriate in the circumstances of a particular case;

- as far as possible while recognising the need to provide reasonable opportunities for development of new uses, plan for use in areas adjacent to areas of heavy use so that opportunities remain for re-location of tourist programs, either temporarily while a seriously degraded resource recovers or for a longer period if that is appropriate in the circumstances of a particular case;
- develop with the tourism industry and other stakeholder interests criteria for application of contingency plans; and
- instigate administrative mechanisms to enable a quick response to genuine contingency planning needs;

noting that the Authority:

- does not favour in principle rehabilitation programs for tourism use locations that would rely on the translocation of resources from other parts of the Great Barrier Reef Marine Park; and
- while making every reasonable effort to assist the tourism industry in dealing with disaster situations, neither implies nor accepts any obligation or liability to an individual tourist program or any other person in preparing or implementing contingency plans for disasters.



**GBRMPA Tourism Advisory Group**

**Terms of Reference**

**I. Role**

- To advise the Great Barrier Reef Marine Park Authority regarding management of tourism use of the Great Barrier Reef Marine Park, including management proposals and options that will maximise positive outcomes for both industry and managers.
- To examine strategic tourism use management issues and provide evaluation and feedback on strategic tourism use management processes.

**II. Function**

The Tourism Advisory Group is to function as a competency based group with members being appointed to the Group by the Authority on the basis of individual expertise and experience in Marine Park tourism.

The Tourism Advisory Group will function at a strategic level. It will complement, not duplicate, existing consultative processes operating at Park-wide, regional, sector-specific and local levels. The Group may also act as a referral point, passing on any non-strategic issues that may arise during discussions to the relevant Association or organisation.

In forming the Tourism Advisory Group, the Authority recognises the need to establish long term working relationships with the tourism industry which take into account environmental and socio-economic considerations.

**III. Reporting**

Reporting procedures, for the Advisory Group are outlined in Figure 1.

- All recommendations from the Advisory Group will be passed directly to the Managers for the relevant Project areas (eg. licensing, planning etc) to ensure that the likely impact/s of any management proposal on industry are taken into consideration during the developmental phase of management proposals.
- All recommendations will be fed directly to the Executive Group, and where necessary the MPA, in the form of attachments accompanying relevant tourism use management papers. This will ensure that the Executive Group and the MPA are fully aware of the industry's position on strategic management issues and the likely impacts of Authority decisions on industry, before endorsing management proposals.
- Where appropriate advice from the TAG will be passed on to the Great Barrier Reef Consultative Committee.
- Recommendations from the TAG will not be passed on directly to Associations or individual operators but incorporated into management proposals by the Authority which will be circulated to Associations and operators as a part of broader consultative processes.

**IV. Timing**

The Tourism Advisory Group will meet 4-6 times a year. Meetings will be held on a quarterly basis or as required. Meetings will take place in Townsville and typically be of one day in duration.

## **V. Structure and Members**

At the Tourism Use Management Workshop held in May 1996 participants agreed that members elected to the Advisory Group from the tourism industry should be competency based, with individual members being appointed by the Authority.

To ensure the structure of the group is reflective of the diversity of tourism interests, it was agreed at the Tourism Workshop that members should be appointed on the basis of experience and expertise in a broad cross section of tourism related areas. These areas include types of operation, geographical area and linkages to the broader tourism community.

Individuals will be appointed to the Group on the basis of their ability to bring with them personal expertise and experience from as many as possible of the following areas:

### **i. Marine Park Tourism Sectors.**

- Pontoon Based Operations.
- Bare Boat Operations.
- Long Distance Roving Operations - mixed Charters.
- Regular (area specific) Rovers
- Resorts.
- Game Fishing.
- Dive Operations
- Aircraft Operations

### **ii. Geographic Regions.**

- Far Northern.
- Port Douglas/Cairns.
- Whitsundays.
- Mackay/Capricorn.

### **ii. Tourism Marketing and Promotion.**

- Australian Tourism Commission (ATC).
- Queensland Travel and Tourism Corporation (QTTC).
- Local Tourism Associations (LTA's). Cairns/Port Douglas (FNQPB) and Whitsundays (Tourism Association).

Over 90% of tourism use in the Marine Park is based offshore these two areas.

### **iv. Consultative Committees and Advisory Bodies and Boards.**

- Great Barrier Reef Consultative Committee.
- Maritime Industry and Science Council.
- Maritime Industry Consultative Committee.
- GBR Co-operative Research Centre Board.

To function successfully as an Advisory Group, it is recommended that the number of industry representatives be kept to around 10-12 members. The group should, however, have sufficient flexibility to bring on board individuals with expertise in specific areas on an as needs basis.

To ensure TAG members are fully aware of the views of regulatory bodies involved in tourism use management, it is recommended that representatives from the following Departments responsible for tourism and environment policy, planning and regulation also attend meetings to provide background rationale and advice to TAG members on issues.

- **GBRMPA .**  
Chair or Executive Officer & the Tourism Coordinator. Other GBRMPA staff to attend on an as needs basis to provide advice on specific issues.
- **Queensland Department of Environment (DoE).**  
Member to be appointed by the Department. Other DoE staff to attend on an as needs basis to provide advice on specific issues

- **Commonwealth Department of Industry, Science and Tourism (DIS).**  
Member to be appointed by the Department. Other DIST staff to attend on an as needs basis to provide advice on specific issues
- **Queensland Department of Tourism, Small Business and Industry.**  
Member to be appointed by the Department. Other Department of Tourism, Small Business and Industry staff to attend on an as needs basis to provide advice on specific issues
- **Experts such as economists**  
For expert advice, eg on the economic implications of recommendations.

### Chair

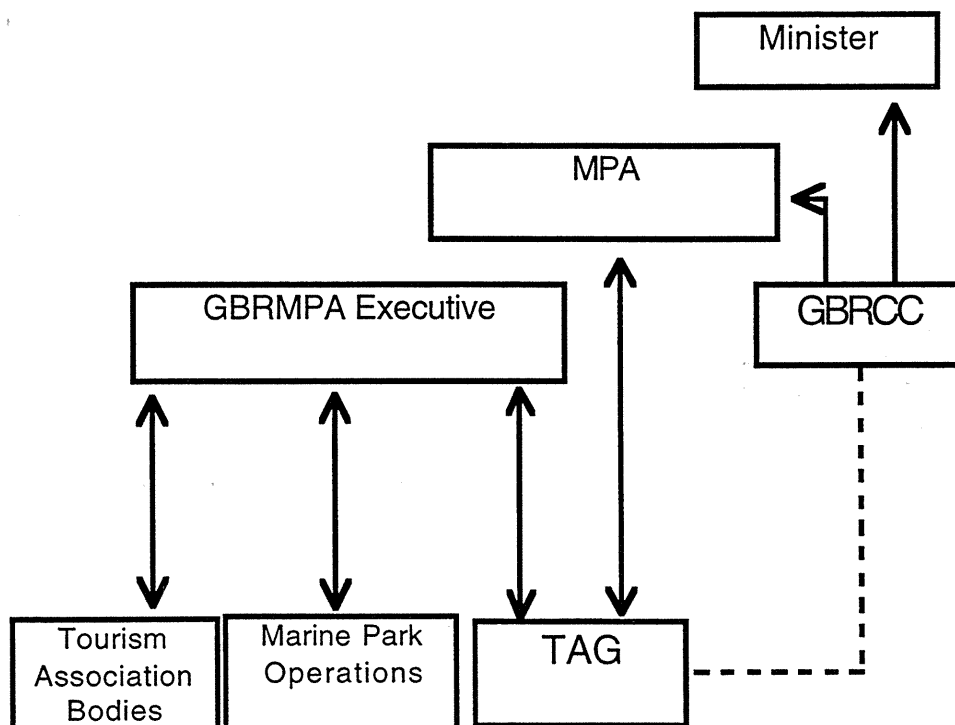
To be elected by Tourism Advisory Group members on an annual basis.

## V. Review

Following an initial pilot period the functioning of the Advisory Group is to be reviewed, in a process that would include self assessment by the Advisory Group and evaluation of the Group's functioning from the GBRCC, the GBRMPA Executive and the tourism industry at large.

The TAG's operations will need to be revised periodically, taking into account the extent to which the Group remains fundamentally an Advisory Group to the Authority, or becomes an industry-driven and -resourced body operating independently but from which the Authority formally and informally accesses advice.

**FIGURE 1 - PROPOSED REPORTING PROCEDURES IN RELATION TO THE TOURISM ADVISORY GROUP**



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