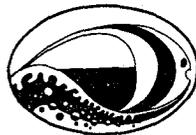


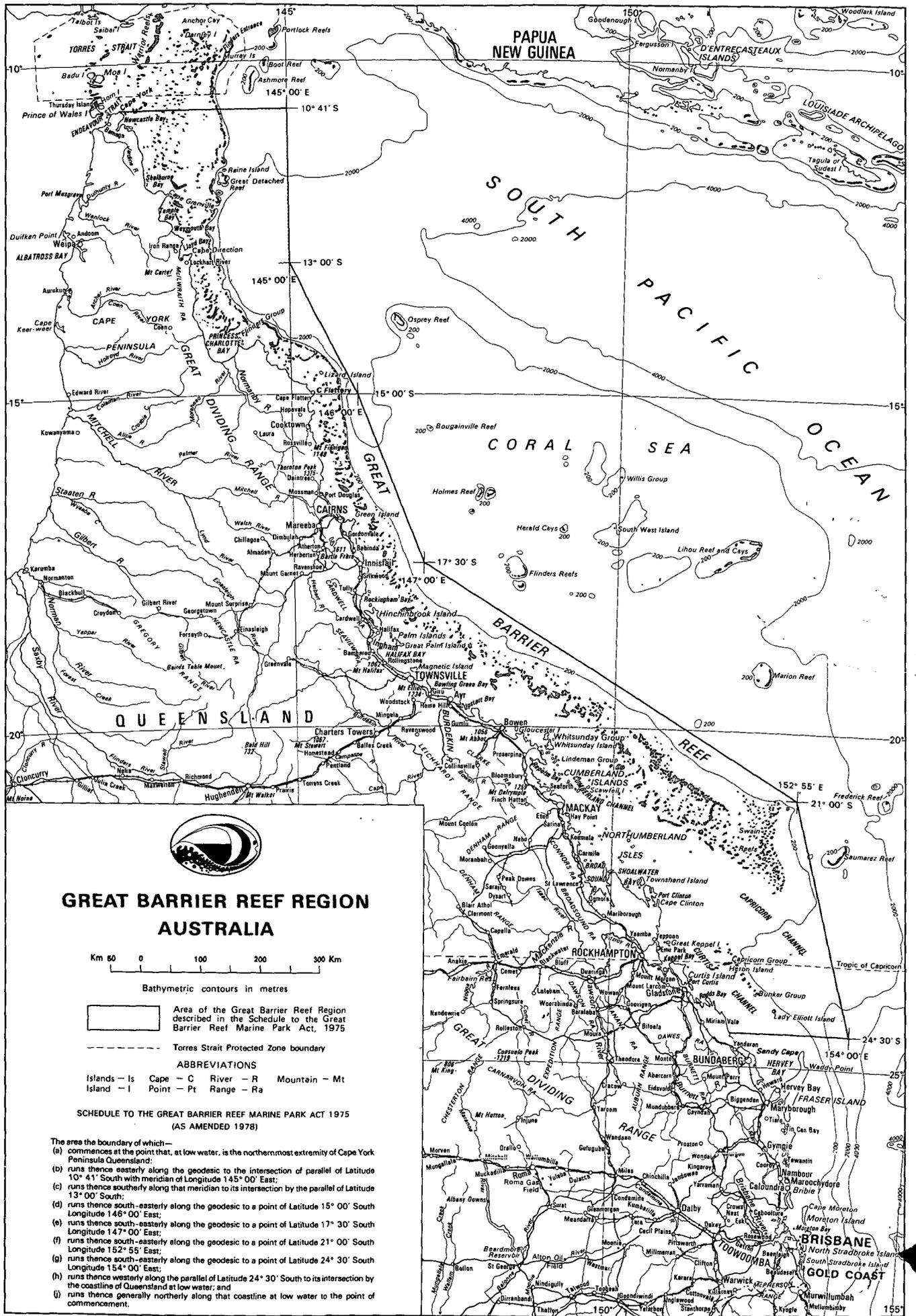
G.B.R.M.P.A. WORKSHOP SERIES NO. 4
ISSN 0156-5842
ISBN 642-52273-1

Papers and proceedings of the
workshop "Tourism and the Great Barrier Reef"
held in Mackay, Australia on 9th, 10th, 11th
April 1979.

Sponsored by the
Great Barrier Reef Marine Park Authority, and the
Queensland Department of Tourism



Great Barrier Reef Marine Park Authority
Townsville, Australia
1981



GREAT BARRIER REEF REGION AUSTRALIA

Km 50 0 100 200 300 Km

Bathymetric contours in metres

Area of the Great Barrier Reef Region described in the Schedule to the Great Barrier Reef Marine Park Act, 1975

--- Torres Strait Protected Zone boundary

ABBREVIATIONS

Islands - Is Cape - C River - R Mountain - Mt
Island - I Point - Pt Range - Ra

SCHEDULE TO THE GREAT BARRIER REEF MARINE PARK ACT 1975 (AS AMENDED 1978)

- The area the boundary of which—
- commences at the point that, at low water, is the northernmost extremity of Cape York Peninsula Queensland;
 - runs thence easterly along the geodesic to the intersection of parallel of Latitude 10° 41' South with meridian of Longitude 145° 00' East;
 - runs thence southerly along that meridian to its intersection by the parallel of Latitude 13° 00' South;
 - runs thence south-easterly along the geodesic to a point of Latitude 15° 00' South Longitude 146° 00' East;
 - runs thence south-easterly along the geodesic to a point of Latitude 17° 30' South Longitude 147° 00' East;
 - runs thence south-easterly along the geodesic to a point of Latitude 21° 00' South Longitude 152° 55' East;
 - runs thence south-easterly along the geodesic to a point of Latitude 24° 30' South Longitude 154° 00' East;
 - runs thence westerly along the parallel of Latitude 24° 30' South to its intersection by the coastline of Queensland at low water; and
 - runs thence generally northerly along that coastline at low water to the point of commencement.

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INTRODUCTION

This workshop, "Tourism and the Great Barrier Reef" was sponsored by the Great Barrier Reef Marine Park Authority and the (then) Queensland Government's Department of Tourism. It was held at the Mackay City Council Chambers from the 9th to 11th April, 1979.

The purpose of the workshop was to bring together a cross-section of representatives associated with tourism in the Great Barrier Reef Region, enabling them to:

- discuss marketing, conservation and research needs for Great Barrier Reef Tourism;
- review by open forum, the roles of government agencies which have a public responsibility towards the reasonable use of the Great Barrier Reef.

One hundred and twenty one delegates attended and participated actively in the program, which featured five workshop sessions with discussion periods, forum panels and a reef flight excursion.

Key note and panel speakers were selected for their expertise and ability to communicate their particular topic. Each workshop session was chaired by a recognised industry specialist. The proceedings were recorded in full; papers and delegates, deliberations have been edited to give a broad representation of the discussions.

The proceedings and recommendations demonstrate the tremendous potential for tourism to the Great Barrier Reef Region.

A major result of the workshop was the establishment of a steering committee composed of tourist industry representatives. The "Reef Region Tourism Task Force" is welcomed by the Great Barrier Reef Marine Park Authority as a means of providing representative contact in a generally fragmented industry.

LIST OF SPEAKERS

Ald. A. Abbott, C.B.E. Mayor of Mackay
Dr J. Baker, Great Barrier Reef Marine Park Authority
Mr R. Claringbould, Australian National Travel Association
Mr D. Coleman, Tropical Queensland Tourist Association
Dr D. Connell, School of Australian Environmental Studies, Griffith University
Mr N. Ellis, Department of Industry and Commerce
Mr W. Franklin, Trans Australia Airlines
Mr E. Grimes, Day and Grimes Pty Ltd
Mr N. Haysom, Queensland Fisheries Service
Mr J. Izatt, Queensland Game Fishing Association
Mr D. Jull, M.H.R., Member for Bowman
Mr R. Kenchington, Great Barrier Reef Marine Park Authority
Mr S. Le Page, Australian Tourist Commission
Mr J. Luscombe, Islands Management Pty Ltd
Mr D. Nettleship, Markman International Pty Ltd
Mr P. Ogilvie, Queensland National Parks and Wildlife Service
Dr J. Pigram, Department of Geography, University of New England
Mr J. Richardson, Australian Tourist Commission
Mr P. Strangleman-Duc, Tour Contractors Pacific Pty Ltd
Mr A. Stringfellow, P & O Australia Ltd
Mr P. Wakeling, Queensland Department of Tourism

LIST OF PARTICIPANTS

Ms M. Arbuckle, Grace Brothers Travel
Mr S. Barnes, Lands Department
Mr J. Bearman, Department of Mapping and Surveying
Ms L. Benfield, Grace Brothers Travel
Mr T. Bolger, Hinchinbrook Island Pty Ltd
Mr K. Bowie, Air Whitsunday Amphibian Air Charter
Mr T. Carey, Wildlife Preservation Society of Queensland
Mr R. Catto, Caravan Parks Association of Queensland
Mr G. Chapman, Far North Queensland Promotion Bureau
Mr A. Chetcuti, Sun Plaza Motel
Mrs K. Chetcuti, Beachcomber Motel
Mr J. Clark, Office of the Minister for Science and the Environment
Mr J. Clarke, Kern Brothers Ltd
Mr J. Clayton, Ansett Airlines of Australia
Dr W. Craik, Great Barrier Reef Marine Park Authority
Mr N. Davidson, Ansett Airlines of Australia
Ms J. Deakin, Department of Tourism
Mr B. Dean, Roylen Cruises Pty Ltd
Mr S. De Pinto, Coral Sands Motel

Ms L. Dougherty, Grace Brothers Travel
Mr J. Dow, Hinchinbrook Island Pty Ltd
Mrs T. Eastwood, Magnetic Island Bus Service
Mr T. Edmestone, Keppel Island Cruises
Mrs T. Edmestone, Keppel Island Cruises
Mr P. Ellis, Co-ordinator General's Department
Mr I. Emerson, Coral Coast Agencies
Mr B. Evetts, 'Elizabeth E' Cruises
Mr J. Finlay, Trans Australia Airlines
Councillor E. Ford, Mt Morgan Shire Council
Mr R. Gale, Department of Harbours and Marine
Mr M. Gibbings, University of Queensland
Mr G. Gordon, Marlin Marina Tourist Services
Ms G. Haddock, Grace Brothers Travel
Mrs R. Harper, Alma Beach Resort
Mr G. Hawley, Great Barrier Reef Marine Park Authority
Ms L. Hay, Great Barrier Reef Marine Park Authority
Mr B. Hayles, Hayles Magnetic Island Pty Ltd
Mrs P. Hayles, Hayles Magnetic Island Pty Ltd
Mrs S. Hayles Whitsunday Wonderworld Travel Council
Mr E. Hegerl, Australian Littoral Society
Mr H. Higgs, Department of Science and the Environment
Mr E. Hodges, Lands Department
Mr M. Hooper, M.L.A., Member for Townsville West
Mr T. Hundloe, Great Barrier Reef Marine Park Authority
Mr A. Innes, M.L.A., Member for Sherwood
Mr P. Jennings, P.J. Studio One
Mr R. Jones, M.L.A., Opposition Spokesman on Tourism
Mr B. Katchor, Coral Point Lodge Motel
Mrs Y. Katchor, Coral Point Lodge Motel
Mrs K. Katsberg, Grace Brothers Travel
Ms. M. Kahn, Grace Brothers Travel
Mr K. Kortum, Wanderers Paradise Tourist Park
Mr J. Landau, Whitsunday Yachting World
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Mr K. McGill, Department of Tourism
Mr M. McInerney, Motel Shute Harbour
Mrs V. McInerney, Motel Shute Harbour
Mr G. McKauge, Laroc Pty Ltd
Mr J. McKechnie, Office of the Minister for Maritime
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Mr F. McLean, Brampton Island Pty Ltd
Mr T. McLean, Roylen Cruises Pty Ltd
Mr I. McKlintock, Happy Bay Pty Ltd

Ms C. McMullen, Grace Brothers Travel
Ms P. Merrill, Australian National Parks and Wildlife
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Mr H. Micalef, Department of Mapping and Surveying
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Mr L. Nicholson, Lindeman Aerial Services
Mrs M. Nielsen, Townsville
Ms J. O'Connor, Grace Brothers Travel
Mr T. Pear, Griffith University
Dr P. Pearce, James Cook University of North Queensland
Mr J. Picken, Qantas Airways
Mr C. Prideaux, Hertz Rent-a-Car
Mr C. Prior, Barrier Reef Diving Services
Mr C. Rodgers, Orpheus Island Resort
Mr T. Rogers, Grace Brothers Travel
Mr R. Rusan, Airlie Beachhouse
Ms J. Rutledge, Grace Brothers Travel
Mr S. Schubert, Co-ordinator General's Department
Mr D. Sinclair, Capricorn Tourist Organisation
Mr C. Smalley, Great Barrier Reef Marine Park Authority
Mr A. Smith, Trans Australia Airlines
Mr B. Smith, 'Coral Seatel'
Mrs M. Smith, Magnetic Island Holiday Flats
Ms L. Stewart, Department of Tourism
Mr E. Stock, Griffith University
Mr G. Sutton, North Brisbane College of Advanced
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Mr R. Timperley, Shute Harbour
Mr T. Vollbon, Queensland National Parks and Wildlife
Service
Mr N. Warburton, M.L.A. Opposition Spokesman on
Culture, National Parks and Recreation
Mr G. Watson, Capricorn Institute of Advanced Education
Mr B. Williams, Bush Pilots Airways Ltd
Mr R. Williams, Great Barrier Reef Marine Park
Authority
Mr A. Wilson, M.L.A., Member for Townsville South
Mr E. Wilson, Development Bureau of Hinchinbrook and
Cardwell Shires
Mr B. Wood, Australian Travel Scene
Mr S. Woodley, Great Barrier Reef Marine Park Authority
Mr L. Zell, Great Barrier Reef Marine Park Authority

WORKSHOP OPENING

(Chairman - Peter Wakeling
Director of Marketing, Department of Tourism)

WELCOME: The Mayor of Mackay,
 Alderman A.F. Abbott, C.B.E.

I would like to extend to you a most sincere welcome to the city of Mackay, the heart of the tourist industry of North Queensland. For those of you who do not know, the Mackay region is the largest sugar producing and exporting centre in Australia. Another industry of great significance to this region is the mining of coking coal for export. Other smaller industries include a very good beef industry with an export abattoir, a dairying and a timber industry. Mackay being stationed so closely to the Barrier Reef, has vast tourist industry potential.

This is a most important workshop and a highly commendable project. The Department of Tourism and the Queensland Government Tourist Bureau have over the years played a major role in promoting Queensland's natural attractions. Queensland is extremely fortunate in having one of the great tourist attractions of the world - the Great Barrier Reef - stretching along some two thirds of its eastern seaboard, but for a number of reasons, the tourist potential is at present under-exploited and under-capitalised. It is difficult to compete with international tourist markets because of the relatively high cost of internal domestic air transport and accommodation charges.

Full utilisation of the Reef compatible with its protection is extremely important, and the setting up of the Great Barrier Reef Marine Park Authority and the Great Barrier Reef Region are wise and progressive steps.

Tourism in Australia has regrettably not achieved the industrial importance it has achieved in many other countries, due in no way to a lack of major attractions, but more so to our remoteness from the source of supply of potential visitors and to our great distances and small population.

I believe that tourism has not yet been accepted by governments in Australia as a major industry with vast potential. In addition, the tourism industry itself is too insular and too fragmented. There must be a co-ordinated approach to publicity and a proportionate acceptance of the cost of that publicity by the people who benefit. Too many within the industry are prepared to accept the benefits without personal contribution.

I believe it is important to sell the Reef as a unique and beautiful feature and as individual operators, to provide the visitor with individual requirements. This progresses to specialised regional and individual selling, service and customer satisfaction, which is undoubtedly the most effective selling forum.

This workshop must be viewed as an industry education program from which benefits can be gained on a proportionate basis to input, derived from an intelligent participation in the discussions. I would like to briefly elaborate on a couple of points I raised about operators who believe that the industry and the world owes them a living. They must learn to expect from the industry only what they are prepared to contribute to it. Too many for too long have sat back and said "What am I going to get out of it? Who's going to pay for me?" There seems to be a general trend in believing that the public views tourism as being on a pedestal, producing the tourist dollar which will bring great wealth to everyone within the region.

I have agitated and stated for years that I believe the tourist dollar does circulate and benefits do accrue within the region, and to everyone within it. But does the average person see this? As far as he is concerned, the tourist operator is getting money for himself through his business. To some degree this is quite right. You are in the industry to make a living from it. You are there to offer service and to pay a contribution towards the cost of publicising that industry.

I have been recently criticised quite strongly for talking on a regional basis. I say to you again now, the only way tourism can be sold is on a regional basis and then for the individual operators to come back and sell their own commodity, their own particular area and the parts they can sell to the visiting public.

The Great Barrier Reef is a natural feature that can be exploited for tourism. To do that we must try and bring people from overseas. We must bring them directly to North Queensland, and to do that we need to look at where we should bring them, and how we can get an international airport. Ladies and gentlemen, not that I've got any brief for Townsville, but I will say this, Townsville would be the only logical place that any government would look at when considering the expenditure required for an international airport. Townsville is geographically central to the Reef region and has facilities for good commuter services.

If industry is going to exploit Reef tourism, it should look at supporting an international airport for North Queensland and that should be at Townsville.

So, ladies and gentlemen, whether that's hypocritical, whether that's taking it away from my own place or not, I do not know, but I believe that would bring to Mackay and to other centres along the Reef, the type of tourist the industry is seeking.

This is a seminar where you must express your views. There will be a very high standard of paper presentation. You will be able to go away with some indication of your own feelings and the requirements that you think are needed. You must make an input to get a feed-back.

To you all I say thanks for coming to Mackay. We are happy as a Council to participate in this workshop, we are happy to have you in our home. I hope that the two and half days of your workshop are successful, and I wish you well with it. Mr Chairman, Ladies and Gentlemen, I have great pleasure in officially declaring this workshop 'Tourism and the Great Barrier Reef' open.

RESPONSE:

Mr David Jull, M.H.R.,
(Member for Bowman)

Mr Mayor, Mr Casey, the leader of the Opposition in the Queensland Parliament, and my parliamentary colleague, Mr Ray Braithwaite, Mr Angus Innes, M.L.A. and Mr Ray Jones, M.L.A., Mr Chairman, Ladies and Gentlemen.

Thank you very much Mr Mayor for your welcome to Mackay and your discussion regarding the future of the North Queensland tourist industry. I agree with many of the points you raised. Many will be discussed during my programmed speech.

But firstly, I must apologise for the absence of Senator Webster, the Commonwealth Minister for Science and the Environment. A telegram was received from him late yesterday, which read: "As I am in the Northern Territory this weekend, I very much regret am unable to attend your workshop and conference. My best wishes for the success of this particular project" signed J.J. Webster, Minister for Science and the Environment.

Mr Mayor, the Commonwealth Government takes this conference most seriously. I was interested to hear your comments on the role that should be played by the government. In the past, all levels of government; Federal, State and Local have not given the regard to the tourist industry that it has deserved. It is only now that governments are seeing the real benefits that tourism can provide. Governments are aware of the wealth and the prosperity that tourism can bring. It is very easy to say "let's bring the tourist in". There's a lot more that has to be done with a lot of care if the full benefits of tourism are to be obtained, and indeed if we are not to make a mess of our own society in the process.

I believe these are some of the points that will be discussed during this workshop and I trust that the deliberations, decisions and recommendations made will be forwarded to all areas of government concerned.

Tourism is a huge industry world-wide. At the moment it is the second biggest industry in the world, after oil. Last year, tourism was worth something like \$360 billion world-wide, and Australia's share of the tourist dollar was 0.07%. We have a long way to go before we can take full advantage of the benefits of tourism, both international and domestic. I am sure that all the delegates here today will

agree that we must be prepared to give our all in our considerations to find out the best moves to be made in Australia. I am sure that this workshop will be particularly beneficial to those endeavours. I am certainly looking forward to taking the results of it back to Canberra.

Mr Mayor, once again thank you for your very warm welcome this morning. I know all the delegates here did appreciate it.

WORKSHOP SESSION ONE

THE GREAT BARRIER REEF IN THE INTERNATIONAL TOURIST SETTING

(Chairman : Peter Wakeling
Director of Marketing, Department of Tourism)

House of Representatives Select
Committee on Tourism: Findings
relevant to tourism to the Great Barrier Reef

by

MR DAVID JULL, M.H.R.

(Member for Bowman)

Chairman of the House of Representatives Select
Committee on Tourism

I must personally congratulate the Queensland Department of Tourism and the Great Barrier Reef Marine Park Authority for the effort put into organising this workshop. It is very timely, tourism in Australia is on the verge of great advancements. As I said in my reply to the Mayor Alderman Abbott, Australia's share of the international tourist dollar has been very small fry in the past, but now the situations and conditions are being created where we can start taking greater advantage of that tremendous wealth and prosperity that tourism can bring.

I would like to give you a little bit of background about the report "The House of Representatives Select Committee on Tourism". I know a lot of you have probably read it. It's a report that achieved a number of firsts. As far as parliamentary committees go in the Federal sphere, it was the committee that created the record number of witnesses. The committee spent quite a lot of time in North Queensland taking evidence and observing the available facilities and talking to many of the tourist operators. I believe it's a most significant report and one that should act as a bench mark in the history of tourism in Australia. It is obtainable at Australian Government Publishing Service Bookshops for \$4.00 a copy. I understand it's also creating some sales records. I think that's an indication of the interest that has developed in tourism in this country over the last few years.

The Great Barrier Reef figured prominently in the hearings of the House of Representatives Select Committee on Tourism.

In their evidence, the Australian Tourist Commission acknowledged two attractions which potential overseas visitors cited as reasons they would want to visit Australia. One of these attractions was Ayres Rock - the other the Great Barrier Reef.

However, although the Reef was a desirable destination, evidence provided showed that in terms of international visitors, very few in recent years realised their desire of spending time on the Reef, because of the distance away from the international gateways and the high cost of domestic fares to and from the Reef.

In fact, the evidence showed that while seventy-eight percent of international tourists visited Sydney, thirty-five percent visited Melbourne, twenty percent visited Brisbane, and seventeen percent visited Canberra, only four percent visited the Great Barrier Reef, and two percent visited Ayres Rock.

Airfares have always been a problem. Australia by its geographical location is a long haul destination. Once here the distances between attractions are great. The cost of domestic travel in Australia is not expensive when compared to overseas markets on a basis of cents per kilometre. Incredibly, most visitors to the Great Barrier Reef have to fly from Sydney or Brisbane and then turn around and fly over exactly the same route back to their gateway port. The Great Barrier Reef is, of course, a most popular destination with domestic road travellers, despite the conditions of some North Queensland roads.

I believe that North Queensland must prepare for substantial increases in the numbers of international and domestic tourists. The introduction of cheaper international airfares has resulted in an increase in the number of overseas visitors coming to Australia. Early figures make it hard to determine a precise figure, but the most conservative estimates indicate an increase this year of ten percent while optimistic estimates are as high as twenty-five percent. Discussions are presently being held to determine new lower airfares on national jet routes. This will help increase the numbers arriving at this spectacular and unique destination.

However, is the tourist a friend or foe? The quality of the natural environment plays an important role in attracting tourists. Prominent factors in this context include climatic conditions, scenic beauty and natural potential for recreational activities. The coastline is Australia's most important natural asset in terms of tourism. Beaches provide the major outdoor recreation for many Australians. Much development on the coastline has been haphazard, badly planned and influenced by speculative land markets resulting in a ribbon of diluted suburbia. Appropriate planning can assure that future development does not repeat past mistakes. The Australian Heritage Commission (AHC) referred to National Estate Grants projects which have examined ways in which the coastal areas could be better managed and protected. The AHC pointed out that these areas bear the major brunt of tourist activities. Reference was made by the then Department of Environment, Housing and Community Development to the need for a coastal environment policy. The committee concluded that there is a requirement for greater co-operation among state governments, local governments and land developers to prevent badly planned urban ribbon development on the coastline.

I believe the government is conscious of these dangers relative to the Great Barrier Reef and as we noted in our report -

"The Great Barrier Reef Marine Park Act became law in June 1975 and is designed to ensure the control, care and development of the Reef as a resource to be enjoyed and maintained. The Great Barrier Reef Marine Park Authority (Marine Park Authority) is a statutory authority set up in 1976 to establish and manage the Marine Park. The Marine Park Authority is responsible for recommending areas for declaration as parts of the Marine Park, preparing zoning and management plans for these areas and for ensuring that research relevant to the Marine Park is carried out. The Act also established a Consultative Committee which advises the Minister and the Authority. As yet no parts of the Marine Park have been declared, but the Marine Park Authority informed the committee that an area including the Capricorn and Bunker groups and Lady Elliott Island is currently being considered for declaration. This area contains some of the most accessible reefs and is subject to increasingly heavy use.

The Marine Park Authority stated that at present there is very little monitoring being undertaken in the Reef area and it is not known how much damage is done. It named Green Island as a major area where damage is obvious. Green Island is a coral cay within easy reach of Cairns by motor launch and is visited by one hundred and eighty thousand people per annum.

The lack of informational and interpretative facilities about the Reef is noted by the committee. The Marine Park Authority stated that it hoped to be able to provide, perhaps in conjunction with the Queensland Government, an information service advising prospective visitors what to do and where to go, as well as the best times to visit the Reef. Some operators of resorts and commercial aquaria make an effort to explain the phenomena of the Reef to visitors but it appears that many tourists do not have the opportunity to appreciate fully what is the world's largest assemblage of living coral and associated organisms. The Marine Park Authority pointed out that at marine parks in Miami Florida, for example, educative and interpretative facilities are provided on a major scale. It was also pointed out to the committee that education of the public can reduce the necessary level of surveillance.

According to evidence from the Marine Park Authority the Consultative Committee to the Authority has not yet been as active as it would have hoped. The reason given was that the Authority, which had a staff ceiling of eight, is also responsible for providing a secretariat service to that committee. The Marine Park Authority further stated that with this staff ceiling, zoning procedures within the Marine Park may take up to one hundred years. To complete the zoning procedures within twenty years the Authority stated that a full complement of professional and administrative staff are necessary to allow for the completion of declaration and zoning procedures within twenty to twenty-five years.

The committee recommends that:

- (a) the staff ceiling of the Great Barrier Reef Marine Park Authority be lifted to a level where zoning procedures for the Great Barrier Reef Marine Park can be completed within twenty-five years, and

- (b) sufficient funds be made available to allow the Authority to provide interpretative facilities for tourists at the major destination areas adjacent to the Reef."

On Thursday of last week, the Minister for Industry and Commerce, the Rt. Hon. Phillip Lynch, whose portfolio covers tourism, advised the House of Representatives in his reply to the Select Committee Report that staffing arrangements for the Marine Park Authority were awaiting the outcome of discussions between the Commonwealth and Queensland Governments concerning jurisdiction over the territorial seas. Mr Lynch confirmed that funds for the provision of interpretative facilities are now being considered in the context of the forthcoming 1979/1980 Budget.

As well, I believe there is an urgent need for the surveying and mapping of the Reef.

As far as tourist infrastructure is concerned a great deal of work is still needed if maximum advantage is to be taken of the increased wealth generated by the tourist industry. We should be aware of the tremendous advantages the community can enjoy from increased tourism. At a time when Australia does have problems with employment, when industry is shedding labour and concern is expressed at computerisation and automation, it is the tourist industry which stands out like a beacon as an industry that can help solve these problems.

Evidence given to our committee by the Australian Tourist Commission indicated that for every twenty-five thousand extra international tourists coming into Australia an extra fourteen hundred jobs were created. In terms of domestic tourism, an extra 1.2 jobs were created for every \$10,000 spent.

A most significant recommendation was that a study should be made as to the exact economic consequences of the tourist industry on the Australian economy as a whole. The initial study has begun under Professor Johns of the Bureau of Industry Economics. In a working paper released a couple of weeks ago the initial figures indicate that the tourist industry in Australia is about as big as the motor vehicle industry. That is most significant. When we look back over the years at the tremendous assistance given to that industry, the tourist industry has missed out in a number of areas. Some of the blame for missing out can be laid at the door of the tourist industry itself. We found in our hearings that the tourist industry was very fragmented. I think most people would agree with that. There wasn't in actual fact one hard-voiced industry body that could provide industry representation to government.

It's essential that there is a lobby group available to let all levels of government know exactly what is going on. It was saddening to think that there were so many tourism industry organisations all virtually operating on a shoe-string budget including the alleged national industry body, the Australian National Travel Association (ANTA). ANTA's financial support from the tourism industry was very small, reducing the number of effective staff that could be employed.

So if nothing more can be gained from the House of Representatives Select Committee on Tourism report, one would hope that the industry now would recognise itself as an industry, a very big industry when looked at in terms of the motor vehicle industry, and that the people would come together in one common goal to try to promote themselves as an industry, not only to government but to Australia and to the world.

I previously mentioned the impact cheaper international and domestic airfares will have on the Reef and North Queensland, but the effect of domestic tourism is still of paramount importance.

Almost fifty percent of the population in Australia does not take an annual holiday. That is a scary proposition. But it's great for the tourist industry because fifty percent of the nation are out there unmotivated. They are there waiting to be told to get off their backsides and go on a holiday.

Eighty-six percent of Australians going on domestic holidays use their own private motor vehicle, and since road travel accounts for approximately ninety percent of leisure travel within Australia, the provision of roads to cater adequately for this traffic is of special importance to the development of tourism in Australia. The Australian Automobile Association (AAA) suggested that a major requirement for increased domestic tourism is a ready access to the many undoubted tourist attractions the country has to offer. In particular there is a need for vastly upgraded, safer, all-weather road communications.

While acknowledging that much work has been done on the national roads the AAA considered it would be many years before these roads reached a satisfactory standard over their entire length. It was also suggested that climbing lanes should be provided on many more arterial roads as a short term solution to a general upgrading of the roads system.

In a submission to the Commonwealth Bureau of Roads, the Australian National Travel Association (ANTA) claimed that Australia's road system is not geared for motor tourism and cannot adequately meet the needs of tourism. Overcrowding of access routes at peak times, poor standard of some road surfaces, inadequate distance and directional signposting, insufficient kerbside facilities, the high cost of wear and tear on motor vehicles and the motorists' poor opinion of the road system are all factors limiting the growth of motor tourism in Australia.

The declared National Highway system comprises the major links between adjacent capital cities, the Northern Territory, and the Australian Capital Territory as well as the highways between Brisbane and Cairns, and Hobart and Burnie. The States are eligible for full financial assistance from the Commonwealth for approved construction and maintenance works on declared national roads. The development of national roads is undertaken with the co-operation of the States, with an annual program of works being submitted by the States for approval by the Commonwealth Minister for Transport.

The Whitsunday Wonderworld Travel Council claimed that a major problem for the local area was the condition of the Bruce Highway between Mackay and Rockhampton. The road is the main link between Brisbane and Cairns, but year after year it is cut by floodwaters. The Department of Transport in its 1976/77 annual report referred to the construction of a new flood-free link, but the Whitsunday Wonderworld Travel Council expressed concern that such work was not likely to be completed until 1985.

My committee concluded that the future of motor tourism in Australia requires a co-ordinated approach to the development of Australia's road network with due recognition being given to the requirements of tourists to an area, as well as those of local residents. Particular highways of concern are the Stuart Highway, the Bruce Highway and the Alpine Way.

Our recommendation is listed for discussion at the Tourist Minister's Council in June this year.

We have also examined requirements of visitors for accommodation and service facilities for hotels, motels and caravan parks. There is already evidence that there could well be a shortage of suitable first class and deluxe accommodation in North Queensland. There would probably be enough of the Mum's and Dad's type motel accommodation.

In the future there is probably going to be a greater demand for lower cost accommodation. One would hope that in years to come incentives could possibly be given by government to help establish this much-needed low-cost accommodation.

Much of the accommodation provided on the Great Barrier Reef islands could hardly be classed as first class. I'm sure it's quite acceptable for the domestic market. However some of the more discerning overseas visitors are probably looking for higher standards. The infrastructure service within the hotel and the motel industry is another area in which the committee expresses some concern. If a cheaper international airfare is negotiated between Australia and Japan and we start seeing greater movements of Japanese around the country, one wonders just how well set up we are to cater for such tourists. I wonder how many hotels and motels in this or any other North Queensland city have got or would be prepared to get Japanese speaking staff. How many proprietors are prepared to print room service menus in a multi-lingual form. How many of the local coach operators are available to speak to a group of Germans or Japanese in their native tongue?

There hasn't really been a co-ordination or a compilation of standards for our hotels, motels, and caravan parks. We hope that this will develop very soon because this will assist in selling specific destinations to overseas tourists. An interesting development that has cropped up in recent times is quite a big overseas market for the younger type of traveller who is perhaps not looking for the completely sophisticated holiday. The camper-van type, the under 30's type, the adventurous type, could be here in very great force during particular, perhaps untapped, seasons to come. It has been suggested about possibly motivating more New Zealanders to move around Australia bearing in mind that New Zealand is Australia's greatest international market at this stage.

One of the big tourism problems facing local government authorities is that they have to provide much of the infrastructure. Obviously many rate payers are going to resist if they have not been conditioned to the benefits of tourism. There is a need for specific Commonwealth and State government recognition of the intrinsic problems that effect local government authorities faced with big influxes of tourists every year. Our report recommends extension of the investment allowance for upgrading existing plant and provision of depreciation allowances for new buildings and plant.

I was interested to hear the comments of the Mayor, Alderman A.F. Abbott, this morning regarding the designation of Townsville as the international airport for North Queensland. In fact that was one of the committee's findings. We recommend that Townsville be designated an international airport for the reasons mentioned by Mr Mayor this morning. Townsville already has much of the infrastructure available. It is possible to land 707's and one version of the 747 in Townsville. From my talks with the Department of Transport in Brisbane, the concept of ad hoc direct charter services into North Queensland is feasible. The Department would not be averse to allowing an ad hoc charter situation in Townsville.

There are a number of charter operators, clubs and groups around the world looking for new destinations. The American "Adventurers Club" has one hundred and forty thousand members in the State of Illinois alone. They own two Boeing 707 aircraft which are used ferrying groups around the world. Why wouldn't they be looking at the Great Barrier Reef as a destination?

If we are to be stuck with scheduled services into Australia, one would hope that we could see the day when some sort of relaxation of the restrictions on those scheduled services would apply. One of the reasons that we put forward the proposition of upgrading Townsville to an international airport was in the hope that we might be able to create circle routes around some areas of the Pacific. Already we're seeing some movement in this direction in Tasmania. One of our recommendations was the designation of a Tasmanian airport as an international gateway. Through the efforts of some rather vocal Tasmanian members in the House of Representatives, investigations are underway about the feasibility of starting up Christchurch to Hobart services. The Gold Coast has got on the band wagon and they have contacted the people in Hobart I understand to see whether or not it may be possible to get a Christchurch-Hobart-Gold Coast-back to New Zealand situation out of that particular set-up.

About three times the number of Australians go overseas compared to the number of in-bound foreign tourists. What is wrong with the concept of combining a domestic holiday with an overseas holiday? With a gateway port such as Townsville this could be done. We may never stop Australians going overseas and in many respects, I don't think we would want to, but we must try to get that back-up traffic coming in. We should take advantage of those departing Australians and encourage some of their holiday dollars staying in the local area. Surely the proposition of somebody from Brisbane,

Sydney or Melbourne flying to North Queensland and spending a bit of time on a Barrier Reef island, then flying to New Guinea, Bali or Singapore, before returning to Australia via one of the islands off the Reef, could be quite attractive.

I believe that in terms of numbers and generated wealth, North Queensland has a rosy future. The Reef environment is one of the great natural wonders of the world.

That in many ways is rather a rough coverage of something like forty-five conclusions and recommendations from the House of Representatives Select Committee on Tourism report. Our committee is virtually out of business now. The Commonwealth has set up a back bench Committee on Tourism attached to Mr Lynch and that committee is continuing with much of the work that was started by the Select Committee. I'm pleased that I'm able to continue my association with the tourist industry through that particular committee. One would hope that in future, there will be greater communication between all sections of the industry and all levels of government.

Just in closing, I think I should say that the Select Committee comprised people of all political parties in the Federal parliament. There was not one dissenting voice on any of the recommendations that came forward. One would hope that we at all levels of government and industry can work together. I believe our duty at this workshop is to try to realise just how the government and the industry can work side by side for the benefit of all.

DISCUSSION: (Chairman - Peter Wakeling)

ROD WILLIAMS, Great Barrier Reef Marine Park Authority: What barriers exist for adventure club entrepreneurs landing planes in Townsville?

DAVID JULL: One of the criticisms that tends to be made by the international charter operators has been the red tape to get landing rights in Australia. I hope we'll have the pure charter concept towards the end of 1980. That's when Mr Nixon says he will look at the Laker and other proposals again. Can you imagine the effect that a couple of 707's a week dropping into Townsville would have on the local markets? They're carrying one hundred and fifty to one hundred and eighty people at a time.

TOM EDMISTONE, Keppell Island Cruises: You mentioned in your talk about motivating interest in levels of government. Just looking at the list of attendees at this seminar today, only one local authority, Mt Morgan, is represented. How can we increase local government motivation in tourism development?

DAVID JULL: It's very hard for me to comment on attitudes of local government. The Select Committee found there were some local government authorities that were very switched on to tourism, and you can have one next door that couldn't care less. I think that one of the most prominent examples in the evidence was the situation that existed between Swan Hill and Mildura. Swan Hill was going all out to promote tourism and to do everything they could to get them in there; the council next door just didn't want to know. I think it's part of the education process. The Federal government has had to be educated about the true values of tourism. Some of the state governments over the years, I suppose, have had to go through that process as well. I'm sure that it's part of the job of the industry groups to tell the real story of tourism to the local authority areas. One can understand that some local authorities say "well, it's going to cost us so much more in rates to provide so many extra public toilets around the place". But the local economy benefits from tourism. I'm sorry there's only one local government official here, and that there aren't more officially represented. Local government authorities are the closest level of government to the people and, you know, tourists are people too.

ED CASEY, M.L.A.: The 1977/78 three month comparison figures for June, July, and August show a significant increase to twenty-five thousand incoming visitors to Australia. Coming back to the figures you quote of four percent of visitors going to the Barrier Reef, that means that only about one thousand

extra visitors over that period visited the Reef, that's about eighty per week. From my observations one of the biggest problems, and your report certainly touched on it in an excellent way, is the problem of depreciation allowance. Developers want to invest in these major areas, yet the depreciation allowance is really holding this investment back. Can you actually tell this meeting what is happening in relation to these matters?

DAVID JULL: A great deal of research on depreciation allowance for new tourist buildings has come from the Department of Industry and Commerce, from our committee, and from ANTA. I'm probably speaking a little bit out of school. I'm reasonably confident that we're going to get somewhere with it at last because it is one of the things that is essential to encourage more sophisticated development. The investment allowance has to be extended and broadened. Australia is one of the few countries in the world not providing assistance for new tourist plant. Look at the development in Manila, Thailand and Singapore, since the tax holidays and other incentives were introduced. Obviously if we're going to start competing in a real way with the international market, we've got to provide the incentives as well.

MAX HOOPER, M.L.A.: I think everyone acknowledges that if there is to be an international airport in North Queensland, it will go to Townsville and this I'm very pleased to hear, especially when the Mayor of Mackay this morning acknowledged that fact. Mr Jull also made mention that the amount of first-class accommodation in North Queensland is totally inadequate to meet an influx of international tourists and most entrepreneurs also agree with that fact. But Mr Jull, back in 1975 the Pacific Area Travel Association held a workshop of this nature in Townsville which comprised all the Pacific area nations and travel representatives. At that stage Thai Airlines and Singapore Airlines both said they were quite happy to come to Townsville the following year with charter tours. They also made the point that aircraft do not make money sitting on the ground, so if they bring an aircraft say from Asia or Hawaii to Townsville, it has to go back the next day with a plane load of tourists. The point they made, which doesn't seem to have been accepted so far by the travel industry, is that the travel agents in North Queensland should be arranging trips for North Queenslanders. I want to make that point quite strongly, the tourist agencies in North Queensland should be very very active in trying to arrange charter trips overseas from our area. There'll be plenty of people wanting to come back here on return flights.

DAVID JULL: The whole concept of charters is a very interesting one. We have certain obligations to Qantas which nobody would deny. But there are completely new markets available and it's these new markets that we have never really looked at. If only we can start tapping some of those reserves. Do you know there are charters coming down as far as Bali? It's not too far to fly from Bali to Townsville. It's a pity if we're going to miss out on that traffic. I think there's got to be a basic change of attitude between the airlines - the domestics as well as the internationals. The big growth figure in aviation at the moment is tourism and we have to become more tourist-orientated in our attitude to aviation. The airlines have to become more than just a carrying service. One of the ways that we can do that is to look at charters and holiday packaging - two components referred to by Sir Freddie Laker when he appeared before our committee. His is one airline that's made a profit every year of its existence, since the late 40's. He was prepared to come in and pick up Australia and package the whole concept, take it back to England and sell it there, and the two areas that he was interested in were the Great Barrier Reef and the Snowy Mountains. Our recommendation was to give a two-year trial period to scheduled air charters.

What I get sick of in this country is the negative attitude. One would hope that there would be a basic change of attitude to being positive again and realise we've got a great product here. Let's get everything right. Let's get out into the world. Let's get into our domestic markets and let's sell the thing. Stop mucking around with it. Get them here and let's take their money off them.

DR JOHN PIGRAM, University of New England: I would like to take up the recommendation in Mr Jull's paper regarding the zoning procedures for the Great Barrier Reef in the hope that they could be completed within twenty-five years. I wonder if you've worked out that is 2004. That's an awful long way away to me. If we look at that year, 2004, in the context of the suggestions that have been made here at this workshop and in various publications, I can see a great disparity between the numbers of people who are projected to visit the Reef region, and the time schedule in terms of its capacity in getting the Reef ready to accept them. And I would like to place those comments in the context of the last remarks by Mr Jull that we should be positive. I think that the government today has been positive up to date. Perhaps it could continue this positive line and inject sufficient funds that reflect its belief in tourism, and the Great Barrier Reef Marine Park. Because the Great Barrier Reef Marine Park as a tourist destination is not going to succeed on private initiatives alone. There's going to have to be a partnership between government and private enterprise. I think the government should show the way.

DAVID JULL: Dr Pigram was one expert advisor to our committee, and I agree with his comments. Mr Lynch in a recent statement, said that all they were waiting for was the outcome of discussions between the Commonwealth and Queensland Governments concerning jurisdiction over the territorial seas. He said that would be concluded soon. You're quite right - we've got to make every effort we possibly can to proclaim areas of the Marine Park if we are going to take full advantage of tourism to the Reef. I do not necessarily think that it would stop people coming here and one would hope that Sections of the Marine Park could be completed along with infrastructure such as expert advice and commentaries for the visitors, to enlighten their understanding and enjoyment of the Reef. When put in those terms, if we're looking at 2004, it's not a terribly good prospect. Obviously it is a matter of high priority and, as you rightly say, governments should be working with private industry as soon as possible.

The Current and Potential Market
for the Great Barrier Reef in the
International Tourist Setting

by

JOHN I. RICHARDSON
(Assistant General Manager
Australian Tourist Commission)

Since receiving the program for this workshop, I have been mentally congratulating the organisers, not only on the straightforward thrust of the planned proceedings, but also on their sense of timing. None of us is in any doubt what this is all about --- "Tourism and the Great Barrier Reef" is a plain but potent workshop title --- and the timeliness relates to the impact on Australian tourism of new international and domestic air service arrangements.

"The Current and Potential Market for the Great Barrier Reef in the International Tourist Setting". It's a pretty straight-forward title despite its length, but I did think of rewriting the title of the paper I was asked to speak on and I thought of something like this.

"The Great Barrier Reef: Paradox in the International Tourist Setting".

The paradox is this: and this is the point which Mr Jull has already made, of all the things there are in Australia to attract the overseas visitor none is better known in other countries than the Great Barrier Reef. Yet, only 1 in 25 international visitors bothers to go near it. The unpleasant fact is that the Great Barrier Reef is one of the principal lures used to get people to this country, but then it loses out competitively to other Australian attractions.

Why?

Is it a fault with the product?

Or is it a fault with marketing the product?

I would say both. For all its beauty and excitement, the Great Barrier Reef is, for the international visitor, 1250 miles of unfulfilled promises.

Every first-time visitor has a pre-image of the Reef and its facilities and his or her likely experiences there. That image has been partly formed by his or her knowledge of warm water resorts, as well as information on the particular area he or she is to visit. That may have come from as little as a few lines in a tour brochure. Fulfilling that pre-image may not be too hard, but let's be optimistic and think it might be better, and it often is.

But we are still talking of only part of the product, the essential attraction side of it, but still only part. The other parts, which are often in the hands of other people and taken for granted, are just as important. They are often the bits of the promise which are unfulfilled.

They include being able to get to the attraction quickly, safely and comfortably, value for money for accommodation and recreation facilities, international standard presentation - that includes how staff are dressed - and so on.

We know there's nothing wrong with the essential attraction in these parts because nature took care of that for us - but we do need to dissect the entire product and see how each bit of it measures up.

At this point, so you know from which standpoint I am talking, I am going to do something unusual. I am going to resist the temptation to bewail the fact that investors have not been attracted to spend the tens, perhaps scores of millions of dollars to give us one or more resorts on an international scale in the Reef area. A large-scale centrepiece development, which would give an accurate pre-image to many would-be visitors, would make it easier to sell the Reef overseas. It would bring in its wake better and perhaps more exciting transportation facilities. And it must be admitted that the cost in money and time in getting to a Reef resort is often the major deterrent for an overseas visitor.

But it is more fruitful to discuss the product in its present state. We haven't got an international-scale development in the Reef area. I know of no plans for one and the lesson around the world is that investors look upon resort development with less enthusiasm than they do big city hotels - and investors aren't exactly lining up to put their money into hotels in Australia's big cities at the moment. In fact, as far as large-scale resort development goes, the lesson from around the world is that it usually requires government action to get it moving.

So let's look at what we have. Think of the term 'product' in this case as embracing the total experience of a Reef visit. For the international visitor, it includes the journey from where he arrives in Australia, it includes accommodation, food, entertainment, contact with staff the total cost and of course, the ability to satisfy his particular reason for wanting to visit the Reef. There are three principal gateways from overseas to the Reef - Sydney, Brisbane and Cairns. I nominate Cairns because it has flights from Papua-New Guinea and is the entry point for a fair number of overseas visitors mostly Americans, who travel on a package tour circuit which includes the Centre and the Reef.

Clearly, Australian airlines don't agree with what I say about the journey being part of the experience. But let me give you an example of what I mean. Some years ago, I took a direct flight from New York to Honolulu. It was an icy December morning. But once on board the aircraft the atmosphere was transformed to sunny Hawaii - and we hadn't even left the airport. It cost the airline hardly anything beyond imagination. All it took was a few touches, the stewards and stewardesses were dressed in colourful Hawaiian clothes, there was Hawaiian music playing and Hawaiian drinks were served. The passengers' imagination did the rest. It was a long flight, 10 hours, but it was a good one - and I doubt if many on that plane thought back to the cold and troubles they left behind them.

But, in Australia, a flight is a flight is a flight! From one of the jump-off points to this incomparable natural wonderland, fun islands, blue skies, blue seas and, hopefully, for those who want it, romance, it's a flight to anywhere. I think that's a pity. Usually, that jetflight is only part of the journey: a light aircraft, helicopter or boat is necessary to get the visitor to his destination. This can be planned as part of the experience and marketed as such.

Surely, with imagination and an understanding of the customer's comfort and expectation, plus good marketing, the problem of the journey could be turned into an asset or, if that is stretching it, at least made more bearable.

Making sure that the journey is part of a pleasurable experience, means attention to detail - it means ensuring comfort, cleanliness and practicability of airport terminals, it means efficient passenger and baggage handling, good presentation of staff and, in particular in friendly welcoming.

I have mentioned presentation a couple of times. It means people, how they look and how they act towards visitors. I cannot stress the importance of it for the international visitor. It can make up for deficiencies in accommodation or even food. It means everything that overseas visitors be properly welcomed, served and directed. Presentation also means how things look. It may be quite sanitary to bag garbage and stack it on the beach pending removal - and I saw this on one Reef island last year - but that is not presentation. Presentation requires training of staff. It cannot be left to natural instincts. When properly trained, Australians are very good.

Marketing means looking at another set of people: the customers. People want to come to the Reef area for different reasons and that holds true for international, as well as domestic, travellers. They may have a specialised interest such as snorkel or scuba diving, big game fishing or studying the environment. Such people usually have a very strong motivation for making the visit, though it may have to be awakened. Others want to see the Reef merely because they know it to be one of the wonders of the world. Still others go because it's on the itinerary of the package tour they bought. Other than New Zealanders, few international visitors will go to the area for a sun and sand holiday, though that's not to preclude them turning it into one when they get there.

The reasons why people travel need to be studied and the particular attraction of a product for particular people needs to be understood. This is highly pertinent to the international market for Australia at the present time because it is a period of rapid change. The new airfare arrangements give us an opportunity to increase tourism from overseas. At the same time, it must be realised that the new airfares favour the individual rather than the group traveller and this has implications for the Australian travel industry.

The continuance of inclusive tour packages from some markets, particularly the U.S.A., Canada and Germany, is in doubt. Inclusive tour packages may be partly replaced by what are called add-on packages; that is, packages of the Australian content only, without the international airfare included. Add-on packages have been sold successfully in the British market in the past few months, but we do not have a yardstick there because there have been very few Australian packages of any kind on the U.K. market in recent years. So we can't measure the success or otherwise of add-on packages against inclusive tour packages.

With the United States, it is different. I don't think add-on packages will sell as well on North American markets as inclusive tour packages and there seems no doubt that the number of inclusive tour packages to Australia out of the United States will decline, perhaps sharply. This could have profound effects on certain areas of Australia and certain sections of the Australian travel trade. To bring it closer to home, it could affect that nice bit of business in which American wholesalers link Cairns and Alice Springs. One expanding market which will remain devoted to group travel for the foreseeable future is Japan. We expect lower airfares by mid-year and more wide-bodied aircraft on the Tokyo-Sydney route soon afterwards.

Overall, the message in the wake of the new airfares is quite clear: there is change, not only in numbers, but in market profiles and how the travel industry must work. Not everybody in the business will be a winner. The spoils will go to those who quickly discern the significance of the changes and are first in at the right spot with their wares. We can expect more younger people, many of them coming without presold travel arrangements. And this is already happening, the travellers information centre at Sydney Airport, reports a 50% increase in enquiries since the new airfares were introduced.

The greatest increase is in Germans, there is a significant increase in enquiries from Britons and some increase from Americans, mostly from the west coast. Many of these people are arriving without even a hotel booking for the first night and so they are fronting up to hotels in Sydney and they're going not to the major first class hotels but the second level hotels. There's a marketing lesson there surely.

Market segmentation - breaking up a potential market into target groups of particular types of people - becomes even more important. The Australian Tourist Commission (ATC) has recently pioneered a new type of segmentation study in New Zealand. In non-technical terms, the researchers asked a lot of questions of a statistically acceptable cross-section of the community, did something peculiar with a computer and ended up with the bit which I could understand: people grouped according to their wants and needs in a holiday. This is different to the traditional way of segmenting a market demographically; that is, basically by age and income levels. The researchers pointed out as an example that a 21-year-old student and a 56-year-old businessman, poles apart demographically, at a given time may both need a relaxing holiday and so the same sort of resort may appeal to both. So the New Zealand study grouped people into unusual categories for the research business, called them 'new experience

seekers', 'stay-at-homes', 'young fun and sun seekers' and so on. The biggest category, 23 percent, were 'escapists'. I am assured the term refers only to holiday criteria. This kind of grouping gives the marketing man something to work on, because he can frame his appeals to fulfil the defined sets of desires. To the tourist plant operator, if he thinks about it, it also has benefits. Which of those needs and wants does his product satisfy? Which groups does it suit? What if his product, measured by this criteria, doesn't shape up? If he wants that kind of business, he will have to modify the product. Market segmentation if used properly, could lead to products becoming more acceptable to overseas visitors.

ATC will extend the segmentation studies to other markets this year. It is part of our plan to match specific products to specific market segments in the various countries in which we operate. This is an exercise called 'product/market fit' and involves evaluation of what Australia has to offer the overseas visitor, a formidable exercise, it's a big country.

It seems to me this exercise could be practised on a regional scale and in a less complicated form in the Reef area. As far as the Reef is concerned overseas, there is a problem of image. There is a phoney image that all resorts are much the same and all intimately connected with the Reef. We know this isn't true: there are not only great geographic differences, but also a satisfying variety of tourist plant and style which produce a variety of experiences and cater for a variety of market segments.

The image problem is there, and is the principal reason for my earlier statements about unfulfilled promises. After writing this speech, I asked our overseas officers what they thought of the Reef from their point of view, entrenched as they are in a variety of markets. Specifically, I asked them questions about awareness, cost, accessibility and seasonality. They're all good questions to ask about the Reef, but what came through most strongly was this question of image. It was saleable in every other respect. I'll just quote a few of them, for example from our Los Angeles office, I quote: "Most people who know of the Great Barrier Reef think of coral and fish, not of actual islands. Awareness of individual islands is limited"; from Frankfurt: "Neither trade, except for our specialists, nor consumers have precise ideas about what activities can be undertaken. Our impression is the resort islands try to sell us a sun and sea holiday without defining associated activities which give specific reason for visiting the Reef as opposed to the Mediterranean and Bahamas, etc.". This is an indication of how they see

competition, incidentally. From Tokyo, a clip that said "only Green Island is known generally. We need comprehensive Great Barrier Reef booklets, films and audiovisual material". One travel counsellor sent a confidential note (and I'm breaking her confidence but I want to make a point) saying she recommended only a handful of islands, and I won't name them, adding that "the other islands are only vague attractions to promote". One consequence of that comment is that we'll give her a familiarisation tour.

I want to make the point that we're not blameless in this and it might be easy for you to say "well if this is the impression overseas, why hasn't the Australian Tourist Commission done something about it beforehand?". That's not quite the problem, the real problem is we can't create the definitive images, the images which really do something for a product, the operator has to do that. He can consult us, we can give him advice on how we feel it should be tackled for various overseas markets because we rarely speak of just one overseas market, but in the end it must be he who decides who he markets to and what he should offer.

I don't know how this "it's-all-the-same-thing" image grew up. I know there have been some successful marketing efforts pitched at defined sections of the market. Even so, looking at the advertising and promotional material prepared for the domestic market, I find the experiences promised as being very much the same, too much the same.

As an aside, I would concede that this problem is not only confined to Reef marketing. Perhaps Australian travel marketing, particularly advertising, is going through a bad period. It lacks product definition. Everything is much the same in the land of contrasts. The basic problem is an old one in Australia, by saying too little about too many things you say nothing.

In the Reef area, there are a great variety of experiences to be had. The differences aren't being made clear enough. Yet every place I have been to, islands or on the mainland, has at least one distinctive feature which could be made its trademark. If there isn't one then one can be made. We need to accentuate the positive, and let the rest merge into the Reef background which can often be taken for granted.

Now, with a distinctive image in mind, it is possible to decide which market segments to aim for. In the international field, ATC is in a position to help determine this and we will be happy to do so. The appraisal must be carried full circle. Take an example of an island resort. It

may have features which instantly suggest appeal to a particular market segment, but is it complete appeal? Let me illustrate with a market segment we were looking at a few years ago. It's a segment which would require too much fine tuning for any Reef resort I know of to attempt to reach and satisfy. But it is useful for illustration. It is the young professionals: median age 35; making it as lawyers, doctors, accountants and business executives; unmarried or married without children; and with plenty of income for discretionary living.

Their lifestyle is very upscale. You can see it in their cars, clothes, clubs and so on. They may well take a sincere and intelligent interest in the Reef area during the day and enjoy the facilities for diving and fishing. But they would not enjoy, for too long, Australian homeliness in the dining room at night.

You may think I have not made a direct attack on the subject I was given to speak to. You remember? "The current and potential market for the Great Barrier Reef in the international tourist setting". But I have made some observations which bear on it. As far as the current market is concerned, it is being only feebly tapped. The statistics tell that story. More imagination, and attention to detail of presentation doesn't cost much, but can make the world of difference to the acceptability of a product. In marketing, we should develop a much more distinctive and positive approach to product definition, picking out a trademark feature, spreading the word on it and making sure the product lives up to its promise. That doesn't cost much either. In other words, I believe the Reef could be positioned much more firmly in international markets with some hard work, lots of co-operation among all relevant parties and modest expenditure. The market in the future will be greater than ever. We will not have to wait 10 years before our present overseas intake is doubled. By that time, I think we will be well on the way to developing more regional tourism for international visitors to Australia and the Reef area should be a prime beneficiary. The competition will be fierce. And, to keep up will require developmental investment. It is an interesting decade ahead.

DISCUSSION: (Chairman - Peter Wakeling)

TOM McLEAN, Roylen Cruises, : We've been operating cruises to the Barrier Reef for 32 years. It's a very dangerous proposition to suggest to people that the Reef is always accessible. There are 10 to 15 weeks in the year, when it is impossible to approach the Reef. And it's just not a matter of getting there. When you get there, you've got to put people in glass bottom boats, and we've faced many dissappointed and sometimes very vocal customers from America, Japan and Germany who have come to the Barrier Reef and were unlucky enough to strike one of those foul weather periods. So you're faced with the problem. Do you say "I'm sorry, we can't go", or "Well, we won't go because it's too rough", or if you take them, they may say: "You should have had more sense and not go". The Great Barrier Reef should be promoted with the inclusion that it cannot be visited year round. We notice the bulk of American visitors come between late January and March and we do our best to please them. We try hard because that's our sole source of income. But somewhere along the line, we've got to warn people that the statement, "when weather permits" is a very real one and one we've got to take notice of.

JOHN RICHARDSON: Captain, that is a very good point. In advertising the Great Barrier Reef we must tell people the truth from the start, and ensure they realise there are alternative activities to enjoy in the Reef area apart from just seeing the Reef. It's not always possible and not always pleasant.

JOY RUTLEDGE, Grace Bros. Travel: I was fascinated to read about the ATC New Zealand segmentation investigations. Germans, Japanese and Americans all have different wishes and different personalities.

JOHN RICHARDSON: That is why we're doing these segmentation studies. We have a very interesting market and one that is beginning to take off quite rapidly. It's been an interesting exercise because we've been concentrating on getting a response from one particular market segment. In fact I'm having some argument with our Frankfurt office because I think they've been over-concentrating on just one market segment, the adventure seeking type of person, but they point to success. The German in particular, is interested in getting away from his own crowded living. I was talking to some German travellers at the week-end on Lindeman Island. As an exercise, I traced how they decided on their holiday choice. You know, the whole motivational cycle in getting them to Lindeman.

The interesting thing was that it all started with reading an article which described walking along the plateau at Lindeman Island and seeing the huge sky, the sea and all the other islands. The article, written by a German journalist evoked a feeling of spaciousness and that was the motivation that started them off on quite extensive research before they got to Lindeman.

MAX HOOPER, M.L.A.: I think we've skipped far too lightly over that statement made by Captain McLean. The real crux of the matter is why are people not going to the Barrier Reef. Executives of both domestic airlines have told me quite frankly they hesitate to promote sending people to North Queensland and the Barrier Reef. Now there are thousands of islands around the Pacific as good as the islands we have off the Queensland coast, and you can't escape that fact. There are all sorts of reef areas around the islands which makes them very attractive. Surely to goodness, this workshop must talk about something constructive on how to get people to the Barrier Reef. I've heard lots of suggestions put up at various times that are unusual, for example, a large tanker should be located out there and made into a motel or hotel type operation, or take tourists out by helicopter. These things cost millions of dollars. It's going to need some federal government action, I believe, and I would hope that the Select Committee on Tourism might have done something towards that, in advocating some financial assistance to entrepreneurs to actually get people on to the Barrier Reef.

JOHN RICHARDSON: Well, I certainly wouldn't speak against that. What I was trying to do was to confine my own remarks here to what exists now, rather than looking forward to millions of dollars investment because I don't know quite where it's coming from. I take the point that if some means can be found to ensure that people can get to the Reef at any time, that's a great plus. My other point is that, I repeat myself here, there's an awful lot of wonderful things to do in the area without going out to the Reef too. We just ought to be honest about telling people that sometimes they can't get to the Reef in comfort.

ALAN STRINGFELLOW, P. & O., Australia: I guess that the first thing I could say is I am staggered. This is a workshop of tourism on the Barrier Reef and we've got a number of people talking about difficulties of getting people to the Barrier Reef. Let's face it. We have two resorts in this country which are on the Barrier Reef, Green Island, and Heron Island. I think we're talking a lot of nonsense if we don't recognise the fact that we have a number of resorts which offer different things which have in some instances been promoted differently

but which can offer right now access to the Reef, 365 days a year. Now, there is no need to talk about the need to cruise the Barrier Reef, the need to spend millions of dollars. In 1978, on Heron Island, 40% of the people who came to the island came from overseas, so they know how to get there. The products are there now, they may not be as good as we would like and I think that we would all like to see better resorts on the Reef, but the reality is that there is a facility for getting to the Reef all the time.

JOHN RICHARDSON: But I think Alan, you'd agree, that in our terms, you're speaking of one island with limited capacity. Heron is a very promotable island overseas. When the ATC started special interest promotions in the United States in 1974, we quickly over-reached ourselves on the capacity for scuba-diving. We didn't have the boat facilities, which was the big problem at that time and we withdrew from it as other specialist operators took more interest, many of whom you do business with now. The point I was talking about is in a larger framework, in other words, existing plant needs to be used. Existing investment in this country is under-utilised despite all the talk about needs. If we have a better tourism distribution system, that is, getting people in and out and all over the place, we would solve a lot of our problems.

How Successful Are We?

by

PAUL STRANGLEMAN-DUC

(Australian Manager, Tour Contractors Pacific Pty Ltd)

My travel or leisure business experience began as a magician illusionist. This stood me in good stead for the travel industry as I found both were closely related.

Leisure is anything where people can relax.

Leisure and entertainment are thus inter-related.

It is the same for a visitor to any country. He wants to see, learn, visit, without placing too much effort in making things happen.

This is where the inbound tour operator, the hotel, or the airline provides the service to look after the visitor.

Inbound tour operators have a definite place in the travel industry. They may consist of a small dedicated group of individuals or may be part of a large group of companies. They attempt to learn as much as possible about their subject and spend time familiarising themselves with the country.

This gives them the satisfaction of being able to show their own country with enthusiasm and pride. They are only too aware that the country is enormous and yet unseen by many of its own inhabitants.

This is probably normal for any country.

The inbound tour operator must be conversant with the arts, politics, the way of life and many specialised subjects in which visitors are interested. They are the liaison between the service provider and the client, agent and/or the wholesaler.

Lower priced airfares will encourage more tourists to this country, but by how much nobody knows. The client/tourist/visitor cannot expect to see everything in one visit because of the vast size of Australia. It is most important that we do everything to encourage them to talk about the many comparisons, differences, attractions and unique ways of life that Australia has to offer, with the object that they will talk to others when they get home. Those who have come to Australia will want to return for another sample of our

hospitality and those who have not been here will be encouraged to travel the long journey to a geographically isolated area of the world to experience Australia for the first time. The finest form of advertising after all is 'word of mouth'.

How, therefore, do we achieve this when we have so much competition - so many cheaper destinations from which the tourist can choose?

The U.S.A. offers packages such as 12-day Acapulco holidays for around \$370.00. Hawaiian charters are available for as little as \$300.00.

How do we in Australia, encourage the American, European or Asian to visit us instead of the less expensive product?

Surely we must get our own house in order before we rely totally on the marketing organisations, and airlines, to supply us with tourists.

It is easy for the European wholesaler/agent to put together a very attractive package to the Costa del Sol because he can go and look for himself fairly inexpensively and sort out fact from fiction. Similarly the U.S.A. wholesaler/agent can put an Acapulco package together, but when it comes to Australia, we must become more dependant on the specialist inbound tour operator. It is our job to ensure that what the brochures say is actually what is given. The onus of responsibility is on us.

For example in Queensland ... how many times does an unsuspecting tourist arrive on a Barrier Reef island after travelling 12,000 miles or more to be told that it is "not actually a Barrier Reef island at all". They have to travel further to see the Reef itself. Again 'word of mouth' promotion, what are they going to say when they get back home?

Does the service provider say in his brochure:

- (a) What he is offering;
- (b) What he thinks he is offering; or
- (c) What he would like it to offer.

Taking a good look around me it worries me that so much is done by so many to discourage the tourist to ever come back to our country again.

What can we do to ensure that tourists praise our services and recommend that others come to Australia. Surely, if we earn our living by giving service then it is most important that we learn to serve.

The expertise of a good host is enjoyed by all: the client who enjoys the congeniality, service and food; the restaurant owner who has satisfied clients who will return and talk about their experiences with others; the waiter who has given pleasure by his expertise as a professional 'servant' and who is proud of his ability to serve his fellow man with a professional attitude; and so on.

In no way should the customer feel 'put down'. We all expect a service from those we employ. This is the most important lesson we can learn.

How many times do we take a good look at our own situation in order to improve our service? The simplest things are usually the most difficult to see. Perhaps our own staff have problems too - an understanding employer is always respected and engenders a greater appreciation of our own business.

As a tour guide, I used to think about this many times. My job was to impart my knowledge, my education, my assistance and always a sympathetic ear. After all the tour members were paying my salary so I owed it to them to ensure they had a carefree holiday.

We all have a choice of what job we do. If one does not like a complaint from a client then perhaps we had better see who is right, the client or ourselves. If the client is right, apologise, it does not hurt and the client will respect you for it. Then, correct the fault so it does not happen again.

The hotel manager that disciplines himself to look through the hotel regularly to see for himself whether the carpets are frayed in the corner; looks at a room after it has been serviced; checks for cracked crockery; checks the upholstery in the lounge; he is the manager who is aware of the problems and can perhaps do something about it. Owners, managers, supervisors, must teach their staff and educate them to understand the importance of the client relative to their own position. The best form of teaching is to show by example. Time must be taken to explain that the client is their business.

There is always room for improvement, it is a never ending task.

We are now competing with the world and what it can offer. If we succeed tourists will recognise the fact that it is definitely worth putting up with 15 hours air travel to come here.

Let us show the world that we have the most beautiful country which is worth visiting again and again and again.

I would like to leave you with ...

'It is a funny thing about life, if you refuse to accept anything but the best, you very often get it!' (Somerset Maughan 1874-1965).

Group Discussions:
Tourism and the Reef

Editor's Note:

In this session, delegates, allocated to one of five discussion groups, reviewed the following common set of questions designed by the workshop organisers.

- . Discuss what visitors are seeking in a Barrier Reef holiday.
- . Do you consider visitor expectations are met by their Reef holiday?
- . Is the Reef the central drawcard?
- . If so, why?
- . Are there other drawcards - for example, the mainland?
- . To what extent are visitor expectations being met by these?

Each group included a discussion leader, a market advisor and a minutes secretary.

Group reports are given below.

Group One Report

Group Leader: David Coleman

Market Advisor: Alan Stringfellow

- . Discuss what visitors are seeking in a Barrier Reef holiday.

Comments are divided between the purists who want to see the Reef itself, and those who want the Reef, plus extra activities. They need far more than coral. Perceptions of the Reef are different between promoters and visitors. The promoters seem to know far more than the visitors, who seem to know incredibly little about the geography of the environment they are visiting. International visitors want to visit the Reef proper, and a normal three day package seems to satisfy them, but we need to identify why certain visitors are not being attracted - what segmentation is there in this market?

We believe that the island resort and its ambience can be carried generally by the word Reef, but we have to differentiate between the two. Perceptions of the Reef are confused. The resort islands are badly marketed, promoted and developed. We need to market two packages; the coastal resort holiday and the Reef holiday. People are disappointed in not getting to the Reef, not being told enough about the Reef. Our interpretation is extremely bad both for the domestic market and the international market.

- . Is the Reef the central drawcard, and if so, why?

Yes, we agree it is a great drawcard both internationally and to a lesser extent domestically. For the international visitor, there has to be activity to ensure repeat visits. Game fishing is a big attraction. Overseas visitors are not attracted just by island resorts. The critical component is to provide visitor information services as expectations tend to exceed realities because of the current lack of information. We feel weather conditions are important, the Reef must be seen in the right conditions.

Availability and accessibility to the Reef is important. The market position of the Great Barrier Reef is slipping because promotion exceeds realities, and the realities basically at the moment are not met. We also feel that the constraint of not being able to get to the Reef is pathetic.

Why does the Reef not sell on the overseas market? Very often the Reef is not being promoted enough yet the resort islands are. Highly desirable specifics such as photography, diving, fishing, exploration of the Reef, and coral and aerial viewing should be promoted as an integral part of the Reef experience. For example, tomorrow we will experience a once in a lifetime aerial flight over the Reefs of the Mackay region. Why couldn't the airlines promote this as an integral part of a Reef package?

- . Do you consider visitor expectations are met by their Reef holiday?

Yes, so long as the specific drawcards have been experienced. Their expectations are not met when they go only to the continental resort islands which cannot give the same experiences as an isolated Reef holiday. We feel that continental resort islands are promoted on the domestic market using drawcards other than the Reef proper, this is how Great Keppel Island is promoted. Many domestic resorts are not good enough for the international visitor.

Group Two Report

Group Leader: Nevin Ellis

Market Advisor: Paul Strangleman-Duc

Our group represented a diverse population; travel consultants, resort managers, boat owners, politicians, in-bound tour operators and advertisers.

- . What are visitors seeking in a Barrier Reef holiday?

A holiday - but it was rather difficult to express these expectations.

The major drawcard of course was the Barrier Reef, that brought tourists to the area. The concept of the Reef has an air of mystery about it. Some interpret it as being pretty coral and pretty fishes, others perhaps are a little more uncertain of its origins and its mystery of nature and perhaps wish to seek something more extensive - but generally the main expectation was for a Barrier Reef holiday. In meeting these expectations, the general view was that as a whole, the Barrier Reef was inadequately available to visitors and that its presentation had a lot to be desired. In addition to the Reef and the mystery of the islands which compose part of it, other activities such as diving and fishing loom large in the minds of visitors - yet overall the central drawcard was indeed the Barrier Reef. There were other attractions nearby which were available to visitors - rain forests, the sugar industry, the national parks. Whilst being available, these aspects were not generally known about, so that visitors' expectations with respect to attractions other than the Barrier Reef were inadequately catered for although the facilities generally were available.

Group Three Report

Group Leader: Dr John Pigram

Market Advisor: John Richardson

- Discuss what visitors are seeking in a Barrier Reef holiday.

It was difficult to achieve concensus amongst a varied range of people, but we agreed that tourists were seeking contact with something vague that we defined as the Reef province; they were seeking a holiday experience which brought them in contact with that Reef environment but not necessarily the Reef itself, although this may have been the central drawcard.

The Reef itself was probably the symbol which attracted visitors and drew them in the first place to undertake the holiday, and at the back of their minds, they were seeking a tropical holiday, palm trees, perhaps girls on the sand and coconuts and a whole range of visions or images of pictures which would make up their Barrier Reef holiday. We drew the contrast between experiences and expectations the same group of people might be looking for in a visit to central Australia or Tasmania. A holiday in Western Europe was also suggested as a contrast to a Barrier Reef holiday. We agreed that there was such an experience as a Barrier Reef holiday but it did not necessarily require constant contact with the Barrier Reef. In fact most of the holidays and most of the visits would have relatively fleeting contact with the Barrier Reef.

. Do you consider visitor expectations are met by their Reef holiday?

Reef holiday expectations are not met because of the lack of visitor information services. The visitors may have all sorts of expectations which may very well have been honestly promoted, but partly because of lack of interpretation when they get here, their expectations are not met and they leave dissatisfied.

. Is the Reef the central drawcard?

I think I have covered the Reef as being the central drawcard, but to reiterate, while it may be the central drawcard, it isn't the central theme of the holiday once they get there.

The other drawcards are the islands obviously and the mainland attractions apart from the rainforests and sugar plantations, the potential of the towns themselves and whether they could be developed as tourist attractions with a relatively small effort.

. To what extent are visitors' expectations being met by these?

There were all sorts of suggestions why visitor expectations weren't being met. The one group of reasons might come under the cosmetics that Paul Strangleman-Duc mentioned earlier, the hygiene part of it, whether the service is right, but interpretation again was important and whether people actually get the fullest satisfaction, the fullest appreciation of the environment which they have been brought in contact with.

We suggest that there were quite marked differences between why domestic and international tourists were attracted to the Reef and we thought this would be a useful area for future reseach.

Group Four Report

Group Leader: Dr Des Connell

Market Advisor: Doug Nettleship

In common with all other groups, we had a wide selection of people ranging from travel consultants, private operators, travel organisations, regional travel councils, and government departments, to reef scientific researchers.

The first thing we addressed ourselves to, was, what is the Barrier Reef? What are people expecting when they come to see the Barrier Reef? What do people really think the Barrier Reef is? Is it the outer edge of the Reef or is it the inner Reef or is it some other area?

We considered that the Barrier Reef could be found anywhere on the Reef area providing it had coral, fish, and clear water. We weren't so concerned with the biological definition of the Reef. We felt that if people saw coral and fish in inshore areas, there wasn't a need for a long sea voyage to isolated coral islands.

. Discuss what visitors are seeking in a Barrier Reef holiday.

We subdivided people into a number of different groups. The first group were people coming from overseas. We felt that their expectations were different from Australians. People from overseas want to see coral and fish. They want to visit resorts that can provide these. Domestic visitors had less of a tendency to want to see corals and fish and we subdivided the domestic visitors into two categories. One was a group of young visitors who came to the Reef for the social life, the attraction of living on islands, the aesthetic appeal of islands and particularly the climate. The other domestic traveller group were those who travel by private transport to the Reef. We felt that they came for corals, fishing, diving and the attraction of geographical exploration.

. Are visits to the Reef meeting the expectations of these people?

It was felt that for the overseas visitors, the weather was a major problem. Visitors from the northern hemisphere come here for their winter, which is our heavy wind season. The seasonal factors for the Reef should be more widely known. Domestic visitors were easier to satisfy with day trips to the Reef. Weather is not so important with domestic visitors because they are usually here for longer periods of time. It was suggested that domestic interstate visitors do not want to return to the Reef. One trip is enough. Bad roads and high accommodation costs lead to this suggestion.

We had some suggestions on improving the quality of tourism in the Reef and these were pretty down to earth suggestions. There should be good quality sea food served at tourist resorts. Visitors expect to have the opportunity of savouring rock lobster, coral trout and oysters and this is not always so. Neither is tropical fruit readily obtainable.

- . Is the Reef the central drawcard?

We agreed that it is the central drawcard. It is a wonder of the world.

- . Are there any other drawcards?

We looked at the other drawcards in geographical terms and we felt that these were more important in the Cairns area than in the central and southern part of the Reef.

- . To what extent are visitor expectations being met by these?

Visitor expectations are not so high with the mainland attractions.

Group Five Report

Group Leader: Stephen Le Page

Market Advisor: Wally Franklin

We had a very diverse group consisting of educational and institutional representatives, people from various North Queensland resorts as distinct from Reef resorts, government officials and sales operational people.

Most of the groups that have gone before have paralleled our own findings, with one or two differences.

- . Discuss what visitors are seeking in a Barrier Reef holiday.

We had a problem actually in product identification, we couldn't decide what exactly constituted a Barrier Reef holiday. There is so much division, that we moved across to the types of things that people might want to get out of a holiday. For the overseas visitors, we identified that the primary objective was to see and experience the Reef, to get out and about in it, not just to view it from an aeroplane or from a glass-bottom boat but in actual fact to get in amongst it. The secondary objective was to have a tropical and romantic holiday. The third objective needed to be an activity orientated holiday to participate in activities that could not normally be done at home. The primary underlying motivation throughout for the overseas visitor was the need for an educational experience, perhaps something that could be taken home to their folks. As far as domestic visitors go we saw the tropical climate as being very important - the climatic differentiation between here and down south. They did look for educational experience but it wasn't as important as the general carefree Barrier Reef holiday whichever way they defined Barrier Reef. In fact we saw that Barrier Reef was an emotive term which in fact denoted for the domestic tourist a carefree holiday rather than an educational experience.

. Do you consider visitor expectations are met by their Reef holiday?

We concurred throughout on this one - expectations for overseas visitors were not being met. The reasons being that there were a lack of interpretative facilities both on a commercial basis and an official basis. There is questionably an inability to readily experience the outer Reef. You can experience the fringing Reef off the tropical islands quite readily, but you cannot necessarily get to the outer Reef easily and this reflected itself on the fact that there was not enough products available for overseas or domestic tourists. There was a contention when answering this question, that the Barrier Reef is essentially a non-product - I'll deal with this later because it comes through and its a very important one. But the contention was that it was a non-product which has been over-sold overseas. In other words, there is an inability in physical terms to experience the outer Reef, there is a lack of product, there is a lack of special interest tours and operations or activities such as SCUBA diving, reef walking and so on. In other words we are selling something which we cannot provide.

. Is the Reef the central drawcard?

It was felt by the group that this was not necessarily the case. What was felt as important was the total environment, a tropical environment, the Barrier Reef being a most important and integral part of it.

. Are there other drawcards - for example, the mainland?

We had the benefit of various resort operators' experience, and they came to the conclusion in fact that each market differed considerably. They felt that Reef viewing was not all that important, that it was essential and necessary to have a variety of other mainland attractions, such as national parks, and various man-made attractions. There is a need for a general recreational experience.

We didn't get enough time, Mr Chairman, to answer question five, but there was one other point which I would like to bring to notice. It emerged that as a group and as an operational industry here, we do not know where we are. We couldn't identify what the Barrier Reef was, which was really an indictment. We don't have enough products to satisfy demand which we are in fact creating and without demand there is no product. So whatever we actually go out and sell we will in fact create that product. If we are then left high and dry without an ability to provide that product and satisfy expectations of visitors then I think we should have a good look at ourselves.

WORKSHOP SESSION TWO

SELLING THE GREAT BARRIER REEF

(Chairman : Peter Wakeling
Director of Marketing, Department of Tourism)

Market Strategies

by

DOUG NETTLESHIP
(Markman International Pty Ltd)

What is a market strategy and what are selling tactics?

The answer to developing a strategy is:

(a) Know your product. Product knowledge is selling power, but only if it is used.

The Great Barrier Reef comprises many products and many separate product decisions.

(b) Know your customer. There are two types of customer to be considered here. Firstly decision makers and secondly those who go along as part of the family group. Each however has his/her own life-style and the product answer must be found to satisfy individual customer wants. You must make the tourist 'want the Barrier Reef'. If they want it enough they will move heaven and earth to travel there.

(c) Know your own organisation. The Reef must be sold individually and collectively. This calls for individuals and associations to get together in a common cause. Do you honestly believe you are united enough to develop common objectives, common tourist themes, common tourist brochures so that you all echo the theme 'We are the greatest'?

(d) Know yourself. Regrettably the tourist industry is all too often composed of rugged individuals. To sell the Barrier Reef you must subjugate your own particular view point and link in a common task. Recognise that although you may live in idyllic surroundings, the tourist industry demands 24 hours a day dedication if you are to prove to the prosperous tourist that what you offer has the extra little something the others haven't got. You must provide that answer.

(e) Know your competition. First and foremost you are in the leisure industry. This means you are in competition with birds, booze and bookies, poker machines, caravans, launches, TV sets, hi-fi, sports, crafts and one hundred or more other interests which comprise the leisure industry.

At that point you will realise your slice of the cake, for the whole of the Australian tourist industry probably does not comprise more than five percent of the leisure industry. Obviously your competition has better answers than does tourism in Australia.

(f) Know how to develop a marketing strategy. Tackle this as an exercise in problem solving. Give yourself more research, then develop your existing sales practice in order to achieve break-through thinking. From that point develop a campaign that can be costed, time-tabled and tackled on a step by step basis.

As part of knowing your customer better (see Item (b) above) you must develop common answers to the following questions:

(a) Who makes the buying decision on travel ... and does it vary from State to State?

(b) What is it that they buy? Is there a different image for each of the coastal islands and a separate image again for the Reef and the Queensland hinterland.

(c) When is the tourists' greatest need for travel ... and when is yours? Maybe you must fill your hotels and motels at times which are not generally acceptable to the Australian or the overseas tourist.

(d) Why do they choose the Barrier Reef? Do you really know the answer to this one and have you planned to constantly check and recheck the changing consumer reaction. For tourism, the only constant is change.

(e) Where do tourists really want to go in Queensland? Is it enough to settle for one island, one section of the Reef, or one coastal or inland city? Most tourists crave many travel experiences in the one holiday.

(f) Upon which group do you finally decide to concentrate? There is one thing for sure ... you cannot win them all. Too broad a marketing strategy will only create customer confusion. You must decide on one grouping of prospective tourists, Australian or overseas, rather than all.

You must concentrate on having successfully developed that marketing plan. Not until then can you consider tackling the next tourist grouping.

Finally what is your attitude to this whole conference. Do you regard it as the end ... or is it to be the beginning?

DISCUSSION: (Chairman - Peter Wakeling)

DR JOHN PIGRAM, University of New England: Doug, whom do you consider the most likely person or persons to make buying decisions to come to the Great Barrier Reef? I read recently that it's the kids who make the decisions as to where the family group will go. If that's the case, could we make the Barrier Reef region more attractive to kids?

DOUG NETTLESHIP: Right. Who makes the decision? Research has proved that where there is a family unit, it's a family decision. Surprisingly enough, Melbourne people make more family decisions than Sydney people. Interestingly when a group decision is made, it is made in both Melbourne and Sydney by the more affluent groups. Therefore you will attract the families if you aim for the higher price in the market rather than the lower end. The other question you asked 'Is it the life for the kids?' The answer is yes, however the facilities available now on the Barrier Reef are not good enough.

DAVID COLEMAN, Tropical Queensland Tourist Association: Would you know how high tourism is in the list of discretionary spending in Australia?

DOUG NETTLESHIP: Roughly it would be about \$3,000 million. This includes commercial travellers who stop at motels. Eight out of every ten people that stop in Mackay are commercial travellers, very different to eight out of ten at Shute Harbour or somewhere else who are tourists. But let's give some figures. Do you know how much Queensland spends on racing alone? \$600 million a year. New South Wales spends \$2,000 million on poker machines. The whole of Australia spends \$6,000 million on beer, wine and spirits. Which is selling best? Tourism? Beer, wine and spirits, or cigarettes?

LEONE BENFIELD, Grace Bros. Travel: The travel agent when selling a client a Queensland package, normally sells a flight as the means of transport. Would it be feasible to introduce a package, which the caravanning vacationer could purchase or use at each destination. The package could include a flight to the Barrier Reef, or a lunch and cruise to one of the islands. In other words, create some packages more for the family man who wants to travel cheaply by caravan.

DOUG NETTLESHIP: Yes, it happens already in Tasmania with the sale of tear-off coupons. Each coupon allows the traveller one type of activity as he can only do about one-fifth of all the ideas proposed. And it's got to include a plane flight to the Barrier Reef. If you say that people get sea-sick, then one way to see the Barrier Reef is by light aircraft. You've got to find others. But give your customer a choice.

Identifying Market Profiles

by

ALAN STRINGFELLOW
(P&O Australia)

There's been quite a bit of discussion this morning about the importance of overseas tourists and whether or not they are as important as some of us might feel. Nowhere has anyone looked at the flip side of Australians travelling overseas and the impact that the cheap fares and tremendous promotional attacks can have. Over a long period of time the tourist industry in Australia has had a running battle with the Government over various issues and with the Union movement over weekend penalty rates. It is always comforting to bleed a lot and say how badly done by we are and how a lot of the problems we face are imposed on us by external factors, by unsympathetic, uncaring bureaucrats, by difficult unions who don't really understand the problems of free enterprise.

There's certainly truth in all those complaints, but the thing that none of us really want to accept is that one of the major problems we face is our own incompetence, stupidity, and lack of planning in the management, development and marketing of tourism in this country. And that is, I think, true for all of us in this room to one degree or another.

The topic on which I have been asked to speak is the "Identification of Market Profiles", and this subject is set within the overall session topic "Selling the Great Barrier Reef". We will be covering this topic by looking at the theory of market segmentation and then taking some specific case studies to illustrate how P&O used these principles to position their four island resorts.

A DIGRESSION

However, before getting on to that, I think we should examine the title of this workshop session. I believe that a more appropriate title would have been "Marketing the Great Barrier Reef" rather than "Selling the Great Barrier Reef". The difference is not mere semantics. In my view the different concepts which flow from these two words are significant and the difference in orientation which results may help us to understand some of the weaknesses of our managerial and marketing approaches in this industry.

Few of us would disagree that selling is primarily concerned with, and oriented towards, increased sales of a particular product. To this end, I would suggest, a selling organisation is one which is concerned with stimulating demand for existing products. In the tourist industry this means more money spent on advertising, on brochures and on visiting travel agents, or having them visit your resort, motel or facility. In other words, the solution to insufficient sales is seen to lie in merchandising and promotion in a battle to increase sales at the expense of one's competitors. In times of difficult trading, such as the tourist industry has, and will continue to experience, this combative approach is likely to be further accelerated as operators strive to survive. I am not suggesting that such activities are of no use. However, I would suggest that such approaches are only a partial solution. What then should we be doing?

I would suggest that we, as operators, tour wholesalers and travel agents in this industry, should redirect our emphasis away from selling, and more towards marketing. In other words, we should change the emphasis from trying to sell our existing products to tailoring products to the needs of our customers.

In this way we can ensure that we do not end up with a product which does not fit the needs of our clients. As well, such an approach would enable the entire market to be expanded so providing a bigger cake to go round.

At the moment we're really competing with each other, trying very hard to increase our sales at the expense of someone else, without really understanding, that we're all in the one pot together. The sooner we increase the total market, the more chance we've got of making a go of this industry.

It is important to realise that product in this sense does not just mean the physical buildings, etc., but encompasses service standards, activities and the overall ambience of the facility.

Thus the marketing concept can be seen as focusing on customer needs by means of an integrated marketing approach with the object of generating customer satisfaction, not sales volume. The latter will flow from such customer satisfaction.

I would now like to look briefly at the factors involved in the implementation of such an approach.

To develop a marketing orientation within our organisation, we must firstly engender an attitude which focuses on the needs of our customers.

To do this we must:-

- (i) Clearly define what business we are in. A resort is not merely a place which provides accommodation and meals. It provides a total holiday experience and fulfills individual dreams.

This morning we had a speaker who began his career as an illusionist (Paul Strangleman-Duc). It seems to me that is in fact, one of the businesses we're in, we're in the business of illusion and we have to maintain that illusion for people. A visit to most of the Pacific areas will convince you that illusion works wonders in environments which in many cases are inferior to our own.

Therefore, each activity or entertainment on the resort has to be handled with that in mind. Employees must also have that impressed upon them. For a guest the whole experience must be relaxing and pleasant. After all, he's paying for it.

- (ii) Recognise that we cannot be all things to all men. This is most difficult to accept. Yet clearly, no resort can hope to satisfy all the diverse needs of all possible guests. Thus it is important to target our operations (i.e., our product) to the needs of one segment of the population. In other words, we have to position our product somewhere in the market place. This does not mean we will not have visitors from outside this segment. It merely means that in everything we do we will be catering primarily to the needs of the one group of people whom we have accepted as our target market. How we might select this group is looked at further on in this paper.

- (iii) Tailor our promotional messages and selection of media to our primary target market.

- (iv) Accept that our own views of the world may not be consistent with those of our customers. Therefore, in arriving at an understanding of the consumers' needs we should research our market. This does not have to be expensive but it still may be beyond the resources

of a small operator. This is where ANTA, the QGTB and similar bodies should be looking. In looking at research, the apparent precision of quantitative research should not blind us to the ability of qualitative research to find out the real motivations underlying people's behaviour.

- (v) Recognise the necessity of providing our clients with real not trivial advantages. We should examine the elements in our reputation, resources or product that will enable us to offer differential advantages over our competitors. It also goes without saying that we should not present our product as being something it is not.

Secondly, to adopt this marketing approach, we have to recognise that the actions of all people who have contact with guests will have a significant effect on their attitudes and on our ability to create and retain customers. This is also true, unfortunately, of the actions of people outside our own organisation who interact with tourists. Lack of courtesy, or a slipshod approach here affects each of us in maintaining the image of tourism in this country.

This is what I mean by integrated marketing.

Finally, I would suggest that we seek to satisfy customer needs as a means to long-run profit growth and market share rather than seeking to maximise profits, per se, in the short-run. After all, we have long term investments in plant and buildings and it is essential that we remain in business to utilise these assets in the long term. This does not mean we should satisfy our guests' needs by providing a Rolls-Royce service at Honda Civic prices.

Rather, we should be constantly on the lookout for things we can do for our guests and ways to do them better, while always balancing them against the cost of doing them.

MARKET SEGMENTATION - THE THEORY

The approach is to use what John Richardson mentioned earlier - market segmentation. Market segmentation can be defined as subdividing the market into homogeneous sub-sets of customers, where any sub-set may be selected as a target market to be reached with a particular marketing mix. Thus it can be seen that the basis of market segmentation is that the market is not a collection of buyers with undifferentiated needs. The advantage of understanding and using market segmentation is that individual sellers can find a niche in a market and service it. I believe this is of particular significance in the tourist industry.

Thus, someone starting off in this industry can examine the needs of each segment and compare these with products and services currently being offered. This analysis will show where any gaps are in the market. Once established, continued analysis of the needs of the prime target market enables both product service and advertising to be fine-tuned. Finally, the response from various market segments can be used as a means of optimising the allocation of your marketing budget.

Let's now look at how markets are normally segmented. There are essentially four broad classes of variables. These are: geographic variables, demographic variables, psychographic variables, and buyer-behaviour variables. Some of these variables are shown below.

A SELECTION OF SEGMENTATION VARIABLES

GEOGRAPHIC VARIABLES

- State
- City (by size)
- Population Density (urban, suburban, rural)
- Climate

DEMOGRAPHIC VARIABLES

- Age
- Sex
- Marital Status
- Family Size
- Family Size Cycle (single, married with children, married without children, etc.)
- Income
- Occupation
- Education
- Religion
- Social Class

PSYCHOGRAPHIC VARIABLES

- Ambitiousness (high achiever; low achiever)
- Leadership (leader; follower)
- Authoritarianism (authoritarian; democratic)
- Conservatism (conservative; liberal; radical)
- Autonomy (dependent; independent)
- Gregariousness (extrovert; introvert)

BUYER BEHAVIOUR

Usage Rate (heavy user; medium user; non-user)

Readiness State (unaware; aware; interested; trier; regular buyer)

Sensitivity to - Price
 Quality
 Service
 Advertising
 Sales promotion

With geographic segmentation, buyers are distinguished on the basis of where they live. For marketing the Great Barrier Reef, the primary emphasis in Australia would be on people living along the east coast, and in particular those living in major cities, as this gives access to a majority of the population. There is little prospect of attracting visitors from Western Australia because of the cost and the attractiveness of nearby Asian alternatives.

With demographic segmentation, buyers are distinguished on the basis of demographic variables such as age, sex, marital status, family size, family life cycle, income and social class. Unlike the remaining two bases of segmentation, these variables are relatively easy to measure and hence have tended to be used most often as a basis of segmentation. However, it has been found that buyers' needs may be better differentiated along life style or personality lines.

This leads to psychographic segmentation which seeks to distinguish buyers on the basis of personality differences. If the market for a particular product can be segmented on this basis, the product and advertising appeal are then directed towards these characteristics.

Buyer-behaviour segmentation can be considered in terms of:

- (i) The various benefits buyers seek from a particular product, e.g., are holiday-makers seeking rest and recreation or are they seeking specific interests such as scuba diving or light tackle fishing?
- (ii) The characteristics of heavy, light, and non-users of a product, to determine whether there are any specific characteristics of frequent users which differ from the characteristics of light users or non-users.

- (iii) Marketing factors such as price, quality, service, advertising. In other words is a significant segment of the target market sensitive to changes in these factors?

One of the problems of psychographic and buyer-behaviour segmentation is that of reaching these particular segments in a media sense.

MARKET SEGMENTATION IN PRACTICE

Intuition, supported by research, has confirmed that types of holidays can be segmented into three broad categories. These are: localised Australian holidays; non-localised Australian holidays and overseas holidays. The key factors in each of these are:

- (i) Localised Australian holidays are characterised by convenience, lower cost than alternatives and are perceived as being non-sophisticated. They are generally of short term duration which, when combined with the lower cost, means they are a more regular holiday form for the majority of Australians. In fact, a trip to the Gold Coast from Brisbane would come into that category.
- (ii) Non-Localised Australian holidays are generally less regular than the localised holiday; are more expensive, better planned, more sophisticated, and longer than a L.A.H. As a consequence the holiday maker expects far more value for money and is looking for many different features. In general it can be said that in the case of the over 30 age group, the non-localised Australian holiday is intended to provide "rest and recreation" rather than the hustle, bustle and excitement which is associated with an overseas holiday.
- (iii) Overseas holidays are perceived as offering better value for money than domestic holidays, particularly in terms of quality of accommodation, service standards and generally lower costs. Our research, completed in 1977, indicated that the all-round value of such holidays precludes many people from seriously considering a non-localised domestic holiday. The recently introduced cheaper airfares will have further consolidated this view. In particular, overseas holidays are seen as offering glamour, excitement, different lifestyles, different cultures, and the bargains of duty free shopping.

It is also clear that the market for holidays can be segmented in a number of ways. On the basis of family life cycle, for example, P&O arrived at the following six categories for market segmentation research:

- . Single females
- . Single males
- . Young couples, no children
- . Young couples, children
- . Older couples, no children
- . Older couples, children

P&O then obtained a considerable amount of data on each of these target markets, including their ranking of various features of the ideal holiday destination. In simple terms, we determined what the demand characteristics of various people in the Australian community were, and we had a look at just what was being done to satisfy those needs within the market place. We found that within each group were "active" and "passive" holiday-makers. An "active" holiday-maker emphasises places and experiences, whereas a "passive" holiday-maker emphasises rest, recreation and people contact. Most overseas holiday-makers are "active".

We then examined what was being done in the market place: our assessment was that with the exception of Great Keppel, none of the Queensland island resorts had effectively positioned itself. Hayman was the undisputed premier resort because of the professionalism with which it had been developed, managed, and the strength of the Ansett organisation in the market place. Notwithstanding this, we did not consider that Hayman had been clearly positioned. Simply, it had not been seriously challenged. There was considerable scope for resorts to obtain a "franchise" on segments of the market.

Before briefly describing what was done with the P&O resorts I would like to refer you back to Great Keppel. In 1976 when TAA purchased it, it was a little known, underdeveloped resort. Its image was indistinguishable from most other resorts on the islands off the Queensland coast. The decision was made by TAA to home in on the "young" market whose major interest is in meeting people of their own age. They consider the activities, entertainment and amenities which are available. From that point onwards, all product development, activities and promotional efforts were directed towards the satisfaction of the needs of this market segment. The outcome was a substantial increase in bed occupancy and a clear recognition by the market place that Keppel was a "young-minded" resort.

At Lindeman Island, the decision was made to position the resort clearly into the family market. The "two-children free" concept was developed and launched, and all subsequent promotional activity reinforced this positioning. Prior to the involvement of P&O, Lindeman had been a relatively small (36 room) resort. Today there are 90 rooms on the Island. Activities are geared to amuse and entertain children and to provide their parents some respite from the continual demands of their offspring. Lindeman resort has employed experienced staff expressly to look after the children who visit the resort. The decision to position Lindeman in this way was taken after a thorough analysis of the market and an appraisal of the resort's resources.

Dunk Island, in which P&O no longer has an interest, was almost entirely rebuilt and launched into the upper end of the tourist market, in direct competition with overseas resorts, and of course, other island resorts. Its target market was married couples without children, between 35 and 54. From research carried out, these people were the principal targets for such a product, and their needs were not being served by an existing Australian resort. The marketing campaign that accompanied this re-launch, emphasised the quality and service available on the resort by comparing it with various well-known near-Pacific resorts. Once again, we have an example of a resort which was positioned following a detailed market analysis which highlighted an opportunity.

The final resort which I would like to mention is Heron Island. As you would be aware, it is a coral cay as is Green Island. On its own this provides Heron with some major advantages. In the past three years the market positioning that could have been assumed would naturally accrue to it (i.e., as an unspoiled, secluded resort) has been realised. Year round interpretive programs of both the marine life and the terrestrial life have been introduced, fishing activities have been strengthened, and special interest programs such as the Heron Island Bird School and the Marine Plants and Animals School have been successfully run. More programs are being planned. The resort has worked closely with the Heron Island Research Station Board, the Great Barrier Reef Marine Park Authority, and Queensland's Fisheries and National Parks and Wildlife Services. It's not just a question of dropping on to the edge of the Reef and snorkelling around (although that's a fantastic experience); it's a question of understanding what the Reef is about and caring enough to be able to put aside short run profits to try and make sure firstly that your guests are well looked after, and secondly that they come back.

We are also after the Australian market. We're trying to show Australians a piece of their country which is unique, and give them an opportunity to experience and understand it.

In adopting this positioning, it can be seen that Heron used a different basis for segmenting the tourist market than did the other resorts. Its appeal cuts across demographic bases and lies in the areas of psychographics and buyer-benefit analysis. Heron, because of its positioning, is also uniquely able to satisfy the needs of overseas visitors who wish to see the Barrier Reef. In 1978, approximately 40% of Heron's visitors were from overseas.

Before I finish, I'd like to raise one point. You've each got the brochure that was given out by the Queensland Government Tourist Bureau. Before I say any more, I'd like to say that this is not meant as a specific criticism of the Tourist Bureau. What it does is highlight just what we are doing wrong with marketing tourism. If you turn to the inside cover you'll see a beautiful shot of what is undeniably a coral cay set inside a lagoon at the reef edge. That's a beautiful shot. The copy would seem to suggest that's what the "enchanted islands of Queensland" are all about. It's a lot of rubbish. That's what some islands are about. There are other islands which are beautiful, more stunning than coral cays, but the image that is being sought to be created, is one of the Barrier Reef again. We have that ubiquitous non-product rising up. That brochure by the way is probably about a one thousand percent improvement on the previous one from the Tourist Bureau, but it exacerbates the problem, or image that we've talked about this morning. Every page of the brochure in fact should be looked at closely and the copy read, because I think that what you'll find when you get to the end is that the products have been broken up and described in terms of how far north or south they are from some lines running across the Australian continent. It seems to me far more realistic to have said "let's try and describe these resorts in terms of what they really are, so that when some person comes in and gets this brochure from our Tourist Organisation in this State or in some other State, they can read it and have a pretty clear idea about the differences". Now all of us here could read it and not be mistaken because we all know the products but I really question whether a lot of other people in the general community really know the product as well as we think we do.

Thus, in conclusion, I would urge you to look at your own marketing programs and consider how you might better tailor your operations that you run and you sell to the needs of the market. The historical reliance on the attractions of the Great Barrier Reef will not be enough to enable any of us to survive in today's market. Travellers are becoming more experienced, and more demanding. Overseas holidays are becoming still better value. It's up to us to persuade Australians, and overseas tourists to come to Australia. We have to convince Australians that their own country has what they need, and then to deliver what we promise. Frankly, I don't think we have any alternative but to do it.

DISCUSSION (Chairman - Peter Wakeling)

JANE DEAKIN, Department of Tourism: The larger tourist organisations such as P&O, Ansett and TAA have a capability to plan and produce market profiles, to have access to research and interpretation facilities. One of the problems for the small private operator in this industry is to identify his market and analyse his research. He thinks automatically that it's going to cost a fair bit of money, and in fact it often does, to get a good product. What alternatives are there for the small operators?

ALAN STRINGFELLOW: It's a good question, and it fits in a little with one of my comments, but firstly, I'd like to emphasise one point. Although I work for P&O, the P&O organisation resorts are both free standing. Neither of them are subsidised by P&O and they both have minority share-holders. All the advertising and promotion that's gone through those resorts has been done by those companies. There have been no subsidies from P&O. I've regretted the fact that P&O wouldn't subsidise them on occasions, but that's the reality of it. Lindeman Island is not materially larger than a number of other resorts in this area. Heron Island is smaller than almost every one of the Whitsunday Islands in terms of total numbers of beds. So all operators in other resorts can spend as much money as we do on advertising.

The second point of the question is a lot harder to answer because it isn't our financial resources that helps us with research. It's a question of knowing where to go and having people who have an understanding of research sources available and who have an interest in and a belief that research is a necessary ingredient to marketing tourism. It seems to me that, no matter how much money you've got, if you don't believe that research is a necessary ingredient to marketing tourism, then you won't seek to obtain the information. Regarding individual operators, I would like to think that they could collectively come to terms with their problems, because for many of them they do not have the manpower or managerial resources to cope. I see no reason why an organisation like the Whitsunday Wonderworld Travel Council couldn't play a vital role in research rather than act, perhaps I'm wrong, as a local information office. I see no reason why the Queensland Government Tourist Bureau through yourself and perhaps through more staff in the research area, couldn't act in this way. And I can tell you right now the Australian National Travel Association as part of a restructuring has just established a Standing Committee looking at information and

research needs in the tourist industry. They have a full time Research Officer, and both Wally Franklin and I have been invited to participate. One of the intentions of that committee is to try to disseminate some information throughout the market place. But that isn't sufficient. You can't just rely on ANTA or ATC or TAA or Ansett to come and help you. There has got to be a will on your part as operators, that you believe changes have to come and you believe the way to do it is along the lines that have been discussed.

HORRIE HIGGS, Department of Science and the Environment: I am very interested in the market segmentation research that you've done to establish potential profiles. Could you give some idea of the number of profiles you would see emerging in the Reef area in say 10 years time? Have you any ideas what the matching process such as geography and available resources might be? This may be of concern to the Great Barrier Reef Marine Park Authority when it starts to think more deeply about zoning proposals.

ALAN STRINGFELLOW: I think that's the question that some consultant needs to research. We found as I discussed, that we could break the matter up fairly clearly into types of holidays: localised Australia, non-localised, and overseas, and then segment each of those again in terms of various broad demographic characteristics. Now the importance of psychographic buyer-behaviour type variables can't be denied. We really haven't used them in any area other than Heron and we had a fair knowledge of what we were about anyway, because the market tended to be fairly discrete, so I can't really answer your question fully. I believe you should be able to find say half a dozen broad target segments and then within those you'll find further subsets, each of which is big enough to get into and try to tap for individual products. I think to really answer your question, the Great Barrier Reef Marine Park Authority needs to do a lot more research.

TONY PEAR, Griffith University: To what extent are the costs of a Barrier Reef holiday going to increase in the next two, five or ten years relative to the costs of other goods and services that compete for the consumer's dollar?

ALAN STRINGFELLOW: I wish I knew. I don't know the answer to that. Obviously one of the biggest costs that we face in terms of packaged holidays is the airfare component. Whether or not airfares in Australia can be reduced in real terms depends on government policy. The federal government might decide that it's high time to take off such things as the airport tax or excise on fuel for domestic air services. I can't answer your

question. I think that competitive forces will prevent tourist prices rising as fast as other goods and services. In fact if you go back over 5 years, you'll find that has been the case certainly in P&O's experience. The prices that were charged at our resorts have risen less sharply than our percentage costs have increased. The only way we've been able to stay afloat (to use an old nautical expression) has been by obtaining more bed nights and that's in fact been the key. Greater utilisation of existing plant and equipment rather than being able to just pass on cost increases. So I think that gap will get tighter and tighter and in fact tourism relative to other goods and services will become cheaper in this country. The real question is not whether it will become cheaper relative to other goods and services, but how it will move relative to overseas holidays.

JOY RUTLEDGE, Grace Bros. Travel: Alan, when you place an image on an island, aren't you restricting the market of that island? Does the tourist have to go through the islands and find the one to which he is suited? Am I a Great Keppel or am I a Lindeman? This seems to me rather restrictive as far as marketing is concerned. I know it works in other ways to advantage, but I wonder really whether there's an island just for me.

ALAN STRINGFELLOW: I can only say that I couldn't have asked for a better question on which to finish. I believe that segmentation is the key issue we have got to turn ourselves to. We have to segment our market, position our product and develop such a specialised product that we obtain a franchise on that product. Now that doesn't have to just refer to island resorts. Doug Nettleship has suggested the total sales of cigarettes and other consumer goods in this country are much greater than any expenditure on tourism. Well, I'm somewhat loath to draw any parallels between the two. I'd only say that those industries are all brilliantly marketed with high advertising budgets and they use a lot of market research. They test their products. They test their advertising. And what they do, in many cases, is clearly segment the market. It seems to me that in fact market segmentation has been the success story of a lot of industries and companies. I see no reason why it can't work in tourism. Think about it from your point of view as a travel consultant. If you have a clear perception of what each of the resorts on the Queensland coast is like and what each is trying to do and what market it's after, then with your experience you should be able to very quickly sum up where to send your prospective guest when he/she sits across your desk and tells you what sort of holiday is wanted. But if all you can see is a mass of undifferentiated products, how are you going to be able to send the client to the right place?

Selling the Great Barrier Reef:
TAA Market Strategies

by

WALLY FRANKLIN
(Trans Australia Airlines)

The theme of this workshop is tourism and the Great Barrier Reef and I am presenting a paper on the specific topic "Selling the Great Barrier Reef - Market Strategies".

Let me begin by making two provocative assertions:

Firstly, the least of our worries is selling the Great Barrier Reef.

Secondly, in the context of the workshop theme the topic is indicative of a clear lack of understanding of the relationship between some regions of Queensland and their potential tourist markets and the relationship between the Great Barrier Reef and tourism.

This lack of understanding has led to muddled thinking in tourist marketing for Queensland and has contributed to inhibiting the rate of growth of some segments of the Queensland tourist industry, particularly those regions near to the Great Barrier Reef.

At this point I would like to clarify two things:

- (i) My remarks are directed primarily at the tourist regions in close proximity to the Great Barrier Reef, in particular the offshore resorts.
- (ii) At the outset it is important to make clear the distinction between the Australian and the overseas market. The reasons for this distinction will, hopefully, become obvious as I proceed.

The heart of my accusation of a "lack of understanding", gets down to the fundamentals of marketing, the importance of distinguishing between the needs of potential consumers and the appeals of the available products.

I plan to illustrate my point by sharing with you TAA's experience in marketing those regions of North Queensland in the proximity of the Reef, particularly the offshore islands, over the last 20 years.

TAA initiated a major marketing strategy in 1959 - the aim of that strategy was to maximise TAA's growth and market share of what it saw to be a high potential growth market - Australian holiday travel.

During the 60's we set about establishing a nation-wide network of holiday travel offices, staffed by specially trained holiday travel consultants. We developed a range of packaged holidays combining air transport and the best of available tourist facilities at Australia's major holiday destinations. We initiated national advertising and promotional campaigns both in our own right and in conjunction with local operators to develop sales of these "holiday products".

Naturally, the "Great Barrier Reef" featured as a star destination and we followed the tradition of adopting the Great Barrier Reef as a marketing banner, from which to dangle individual North Queensland resorts; to entice and encourage prospective holiday consumers, both from within Australia and overseas.

All in all things seemed to develop pretty well, between 1959 and 1969 sales grew and the Barrier Reef shared in this visitation growth. However, as we approached the end of the 60's there were some aspects of the Barrier Reef region that began to trouble us.

The majority of visitation was occurring in only a few weeks of the year. This was creating an increasingly skewed seasonal pattern of business which had a considerable impact on the profitable performance and standards achieved by resorts in the region.

Some resorts failed, others needed to 'trim their sails' to keep afloat. This put pressure on management and staff and on general standards of operation, for instance some resorts found it necessary to close down for some of the low season months.

This meant a discontinuity of staff causing a constant problem of training new staff to maintain standards of operation and ensure continuity of service levels. In general there was a tendency to hire unskilled, itinerant service staff which reflected directly on the standards of service provided by resorts.

At the competitive level Australians were travelling overseas more and were able to make direct comparisons between standards overseas and standards in North Queensland.

From an airline point of view, similar problems were experienced - some months heavy demand, high load factors, other months low demand, low load factors. More importantly, if resorts were not up to standard or failed to meet consumer's expectations, if they had bought a TAA promoted holiday travel product they directed their complaint at TAA and held TAA responsible. Hence we were exposed to the full range of consumer reactions to products in the North Queensland region.

I became aware of the magnitude and nature of this problem from involvement in the region earlier in my career with TAA.

During the latter half of 1968, I had the pleasure of spending six months in Mackay as Acting Manager for TAA. During that time I came to know the Whitsunday resorts and the people running them very well. I also represented TAA on the Great Barrier Reef Promotional Council, a very energetic local association, dedicated to promoting the region.

Later in 1970, soon after my appointment to a position which gave me responsibility for TAA's national holiday travel operation, I became more directly involved in marketing the Great Barrier Reef resorts for TAA.

One of the major promotional activities organised by the Great Barrier Reef Promotional Council was the annual Great Barrier Reef Festival staged by the resorts which were members of the council.

The festival was usually held in late September-early October. Mainly because this was a traditional "off-season" period.

At both South Molle in September 1968 and at Brampton, September 1970, I recall that weather conditions during the week of the festival were perfect, the resorts were chock-a-block with FOC's or freebees, as we call them in the trade. Of course these were people who were invited because they had something in a promotional sense to offer the region.

Without doubt on each occasion everyone had a fantastic time and the resorts in the area were at their sparkling best. If you have ever sat on the front beach at either South Molle or Brampton on a balmy September day watching the sunlight dance on the waters of the Whitsunday passage you will know exactly what I mean.

However, on both these memorable occasions the question crossed my mind, if the weather and the resorts were such that those present were having a great time, why weren't there more paying customers at the resorts during September and October, and for that matter why didn't they come in the other so called off-season periods?

In retrospect I realise that this was my first insight into the fact that maybe the seasonal pattern of business experienced by these resorts in the vicinity of the Reef was not caused by natural phenomena such as cyclones or wet seasons or by the timing of the school holiday periods, but in fact by an ineffective marketing strategy based on unquestioned assumptions.

The marketing strategy at the time may be summed up this way.

"The Great Barrier Reef is one of the great natural wonders of the world. It is well known by everyone. Anyone wanting a great holiday could not resist wanting to come to a resort near to the Reef. Therefore the obvious way to develop the holiday market to the region is to associate the resorts with the Reef".

In simpler terms it was assumed, that in the mind of the consumer, the equation was: Great Barrier Reef = Great Holiday.

Between 1970 and 1974 TAA not only questioned the validity of this strategy for the Queensland islands but also began to experiment with alternative strategies.

I have to admit that raising the proposition that the Barrier Reef may not be a suitable basis for a marketing strategy for resorts in the region met with considerable resistance both from within my own company and from operators in the areas concerned. Presumably because it symbolised the need for a radical shift in attitudes towards marketing the region.

One of the very first experiments with an alternative strategy took place in the Mackay region in Spring 1972 when in conjunction with the main resorts of Brampton, Lindeman, Happy Bay, South Molle and Daydream, TAA launched a national promotional under the theme 'five islands for the price of one'.

In contrast to the Reef strategy this was a price oriented strategy. The promotion was not only extremely successful but also had considerable impact in demonstrating that alternative marketing strategies could bring people to the area. It greatly helped in opening the way to acceptance of strategies other than one based on the Great Barrier Reef.

TAA's shift in thinking is clearly expressed in the brochures we produced to sell the island resorts between 1972 and 1976.

In late 1975 TAA commissioned a major consumer research study on the attitudes, needs, perception and knowledge of Australians towards holiday making in Australia.

The objective of the study was to provide an information base on which TAA could revise its general strategy towards the development of the Australian holiday travel market.

We sought answers to questions such as:

What do Australians really want in a holiday?

Do people of different age groups and different life cycles and lifestyles want the same or different things in a holiday?

What do Australians think about Australian destinations and Australian holiday resort facilities?

What do Australians really know about Australian holiday destinations and resorts?

I will summarise the main findings concerning the reef and the island resorts.

Surprisingly, there was an extremely low level of consumer awareness of specific island resorts amongst Australian consumers, that is, hardly anyone in the main Australian markets knew of the existence of the resorts concerned let alone anything about what they had to offer.

You may think I'm exaggerating, but I couldn't help but notice an article in the 'Melbourne Herald', a letter to the editor. The title of this letter was 'Those Airfares'. Knowing that I was coming to this workshop what it said struck me and I think it's worth reading. This person said:

"I am appalled at this continued saga of the so-called cheap airfares to overseas countries. Naturally we would all like to visit other countries as cheaply and as economically as possible, but surely many Australians who take this lucrative bait and accept one of the package deals made by the respective companies do not have any idea of what their own country has. On a recent holiday to Queensland, I was surprised at the many coastal tourist resorts that our eastern coastline has to offer".

I repeat, this person was surprised, so in spite of all our marketing over the last 20 years, here was at least one consumer that did not know our products were available.

"How many of those who accept these overseas fares have ever taken a really good look at our own beautiful country. Surely our many tourist agencies and various airlines could promote tourism in Australia first before throwing in everything to push the Australian tourist overseas." (P. Valentine, Nuns Road, Mornington).

This letter reinforces this point about awareness of our products in the Australian market. Whether they had been to the islands or not, most Australians had a very poor opinion of them, a selection of verbatim comments from our research groups mentioned earlier sums up consumer attitudes. The islands were seen as expensive.

In general, whether people were single and young, older and better off, or members of families, they found little or knew little about the resorts with which they could identify as being important to them in satisfying their holiday needs.

On the other hand the image of the Reef itself was good. TAA's researchers summed it up this way,

"overall, the image and reputation of the Reef itself is very high. But in discussion it becomes apparent the image seems to stem from a certain chauvinism rather than from any real conviction. Enthusiasm is passive and would not generate action. For example, all the older respondents thought the Reef fantastic but only a couple expressed any interest in going there".

However, among many who visited a 'Great Barrier Reef' island resort, the Reef's image waned when they were confronted with the practical difficulties of getting to see or learn something about the Reef. This point has been reiterated many times this morning. Unless they had had the good fortune to choose Green Island or Heron Island they found that the Reef could be up to 40 arduous miles by boat, if the tide was right! If it wasn't they had to be satisfied with a glimpse of "fringing" reef near their resort from a glass bottom boat.

No doubt during their stay they heard wonderful tales of the "Swains" and were frustrated by other exotic features of the Reef.

This research enabled TAA to not only break up the consumer market into distinct groups with common needs, that is to segment the market, but to identify those things that each separate group thought important to them in a holiday.

We are prepared to discuss this research with anyone who is interested in evaluating the effectiveness of their own particular marketing strategy. In particular, P&O took an interest in the study results and were able to use them to advantage in marketing support for the resorts in which they had an interest, that is, Heron, Lindeman and, together with P&O we did some research on Dunk.

All in all, the research confirmed our earlier feeling that, in the minds of Australian holiday consumers, the Great Barrier Reef meant little to them in terms of holidaying. With the information we obtained about market segments we were able

to adopt an effective marketing strategy to market those resorts which we had previously marketed under the banner of the Great Barrier Reef.

This revised strategy was expressed and reflected in TAA's marketing. It has been demonstrated through our holiday travel brochures since 1977. Our current brochure finally realises what the product is in terms of the islands and in terms of the needs of the Australian market. We then set about devising separate tactical strategies to get people to some or all of the islands.

The Great Barrier Reef can be effectively used as a basis of a marketing strategy for North Queensland in overseas markets. However I think the essential point is that it's no good selling that, if you're not going to be able to provide facilities when they get here, which seems to be one of the key points to come out of this morning's discussion groups.

What then, are the implications, of what I have said so far for both the Queensland Department of Tourism and the Great Barrier Reef Marine Park Authority? I might also add that I think these implications are equally directed to every individual or organisation involved in the development of tourism to this part of Australia.

~~For the Queensland Department of Tourism I consider~~ there is yet an untapped market of Australians who will come to North Queensland for a holiday, in fact the Australian market will continue to be more important to North Queensland than the overseas market.

To tap this market North Queensland will need more resort facilities. These facilities will need to be designed, developed, and operated with the Australian market in mind. The Department should do all that it can to encourage investment in new resorts and, as it has done, ensure that existing resorts are operated at the highest professional levels.

The Australian market needs to know about available facilities so effective marketing strategies are required. However such marketing strategies must be formed in terms of what Australians want in a holiday. The validity of any assumptions made in formulating new marketing strategies must be tested.

Only one fifth of the turnover for Australian travel agents comes from selling Australian travel and tourist services. The Department must assume a responsibility on behalf of Queensland's tourist industry to encourage all Australian travel agents to sell more Queensland travel.

Finally the Department must recognise the true role of the Reef in terms of tourism and through both the private and public sector, work towards the accomplishment of that role.

In turning to examine the implications for the Great Barrier Reef Marine Park Authority I will first comment on the issue raised in the last point: what is the true role of the Reef in tourism? I've expressed the view that it is acting as an albatross around our neck rather than the goose that laid the golden egg.

The Great Barrier Reef ranks as one of the most spectacular natural wonders of the world. It symbolises the mystery and wonder of the world in which we live. It is indeed a world treasure.

Australia and Queensland have a responsibility to the world as caretakers of the Great Barrier Reef. On the one hand it must be protected and preserved, primarily from man. On the other hand there is a responsibility to make it possible for as many people who wish, to have access to the Reef.

The Great Barrier Reef, along with the other natural wonders of the world, transcends man-made barriers. Experience of it can provide unifying insights amongst people, it can teach us more about the evolution of life on this planet and it does provide a unique background for the satisfaction of simple human pleasures.

The true role of the Reef in tourism then is that it provides a natural focus for mankind's aspirations, whether they be spiritual, intellectual, aesthetic, or physical.

However, at a more pragmatic level, I believe that Australia and Queensland can derive significant economic benefits through providing the services and facilities which permit people, whether they be Australian, or any other nationality, to satisfy the whole range of human aspirations.

TAA's research suggested that Australians have an insight into this true role for the Reef, reflected in their "chauvinistic pride" of the Reef. On the other hand, as recent

marketing experience shows, Australians are much more interested in the Reef as a background to satisfying simple human pleasures. But I do believe that if easier access and imaginative interpretive facilities and services are available, Australians will use them.

What then are the implications for the Great Barrier Reef Marine Park Authority?

The development of the travel and tourist industry to North Queensland, so far as the Australian market is concerned, is and will continue to be almost entirely independent of the fact that the Reef is nearby.

On the other hand, the development of the international tourist market for North Queensland regions near to the Reef will depend upon better access to the Reef's wilderness areas and the availability of a network of imaginative interpretive centres. I will go as far as to assert that such facilities will be a prerequisite for the development of the international tourist market to this region.

Consequently the Great Barrier Reef Marine Park Authority by its charter, can and must be the catalyst to bring about the establishment of a network of imaginative interpretive centres near to the main tourist regions in the proximity of the Reef.

Australian tourists, who are now being attracted in increasing numbers to the regions near the Reef, could provide the basis for the economic viability of such interpretive centres, if they have to be economically self-sustaining.

In conclusion, I restate the three main points of my presentation:

There is no need to be concerned about selling the Reef. It is already well enough known.

Marketing strategies to develop the tourist industry in the regions near the Reef are needed, but to be successful they must reflect the needs of people who can be attracted to these regions.

In terms of the true role of the Reef in tourism there is a need for the development of a network of imaginative interpretive centres along the North Queensland coast, and as well for much better access to wilderness areas of the Reef. In fact these two things will be essential if Queensland and Australia want to develop the international tourist market to the region for both its economic and cultural benefits.

The Role of the Travel Agent

by

ERIC GRIMES

(Day & Grimes Travel Pty. Ltd.)

The travel agent not only has a responsibility and a relationship to his principal; the resort operator, tour operator, the airline, the coach operator; he also has a responsibility to his client.

To ensure the travel agent satisfies this client responsibility he must know the product. It is amazing how few Australian travel agents really know the product. There is a need for the entrepreneur, the resort owner, the airline, to develop more person to person contact with the travel agent. For example, better and more informed brochures that describe the resort, and small visual aid presentations. Eighty six percent of the tourists come into this area by motor car. The motorists and the caravaner are a very large proportion of our Queensland domestic market.

I believe a good number of tourists have failed to even contemplate a holiday on the coast and the Great Barrier Reef because they have been caught up in the philosophy that cheap package tours can only be bought if it is in association with airline transportation. There are many resort owners here today who would welcome the opportunity of providing a slightly discounted rate to encourage people to occupy the many beds they have vacant at any one given time. I find it very hard to understand why the book of coupons travel component mentioned by the consultant from Grace Bros. Travel has not yet been developed in Australian domestic travel.

How many people are there on the roads who leave Sydney, get to a travel agent office in Nambour and haven't any idea where the Great Barrier Reef is? Having made it from Sydney and Melbourne, they think the Great Barrier Reef starts at Maroochydore or Caloundra. If they get as far as Gladstone, we snare them and answer their questions, "How can I get to the Great Barrier Reef and over to Heron?", and we send them. Of course it is not easy to get to Heron. Perhaps the helicopters are a little too expensive for the family man. Well, where then do they go? Mackay. That's the next place, and of course we wouldn't dare tell them about the bad roads between Rockhampton and Mackay, for indeed many would never get there. So why don't we sell them these package coupon ideas? I'm sure that it presents an opportunity for us. There's terrific potential to be developed.

The independent resort operator needs to seek out travel marketeers who are selling to special interest groups of people. The travel agent knows his own market best. He knows what happens in Brisbane, Nambour and Gladstone. He is a member of the 'club'; he sees his friends every week and there is a group of people who want to go to Brampton Island and the airline package doesn't suit everybody. Why then can't we do something about developing a new and untapped market? Why can't the travel agent network of Australia have access to the tour basing fares? Here are opportunities that exist for travel agents to develop new programs that will put people into your resorts. I believe too that the well-known weekend jaunts and junkets where food and drink flow freely, should be reviewed. We ought to let learning prevail with worthwhile working seminars of selected agents ready to work a lot and then perhaps play a little. One good example is the group of travel consultants being sponsored to this workshop by Grace Bros. Travel.

The second thing I want to talk about is communication: communications up, down, crossways, whichever way you like. As long as we make sure that we get the facts of what is going on. You know, we do live in a modern age! What about using the Telex Machine that is in your office, Mr Operator? It's possible to send out multi-messages on telexes these days. Did you know that? Did you know that you could send a multi-message to the travel agents around Australia and you can tell them that next week you have 50 beds you want to get rid of? Have you ever thought about communicating in that way? Goodness me! We get a lot of information on our telex machine that we just pick up and throw in the waste-paper basket. But I can assure you that if you took the trouble to tell us what's going on in your area, we would perhaps pick up some of that information and try and do something to sell people your way. It needs a little bit of sophistication, I know. It needs some developing.

Communication is something that we are all very interested in, and I applaud and commend the very successful Talk-About, the brain-child of the Australian Federation of Travel Agents, who, 4 years ago in association with ANTA, developed this concept. Here seller and the provider get together and take the opportunity to discuss across the table the various resorts, facilities and services that one has to offer the other. Have you heard about Talk-About? Do you know what Talk-About is all about? What about a Talk-a-Reef? What about the operators on the Great Barrier Reef getting together and putting on a Talk-a-Reef here in Mackay? When you invite

Grace Bros. Consultants, Day & Grimes Consultants and somebody else's consultants to come and sit down and talk with you, they can see for themselves something of the beauty of the Great Barrier Reef. I think it's got much to offer. It might be worthwhile to think about.

We need to find out just what there is here to sell. I would suggest there is a need for the industry to develop a Great Barrier Reef tourist information centre somewhere north of Brisbane to advise those people who are motoring north.

I read, some time ago, an excellent paper that was published in "Travel Week" in which John Pigram said that everywhere the demand for tourism is becoming more selective. Destinations and services which do not meet the needs of current demand, whose pricing is unrealistic or whose promotion is deficient, cannot expect to survive and that is what this workshop, I believe, is all about. Survival! Dr Pigram's statement underlies the fragile state of the tourist industry in Australia, a segment of the economy plagued more than any other by inflation, uncertainty and increasing consumer consciousness. We know that the people attending this workshop come from a variety of different areas associated with the travel industry. You may differ perhaps in the product you sell. The resort owner, hotelier, motelier, guest house proprietor, has accommodation on land to sell. The cruise operator has accommodation on water to sell, while airlines have seats on planes in the sky. The one thing we all have in common however, is a bed-night lost, a berth not slept in, or an airline seat not occupied. Tomorrow is another day. So when we examine the components that make up the industry, segment by segment, we all fit together somewhere in this overall pattern, and it is indeed, I believe, a cycle where each depends on the other. We, as travel agents, depend on you, the airline, the operator, the resort owner, because we can only live and we can only pay our rent and pay our staff according to the commissions we earn. We have a myriad of destinations to sell, overseas, within Australia, and finally, as I said, it's not until we come to that point of sale and take the money from the client that we have done you any good or done any good for ourselves.

Game Fishing on the Great Barrier Reef

by

JOCK IZATT

(Queensland Game Fishing Association)

Gamefishing in Cairns began with the capture of a 1,000 pound marlin in September 1966. This was the first time that a 1,000 pound black marlin had been caught since Cabo Blanco in Peru finished in 1958. This 1,000 pound capture flashed around the gamefishing world and in no time we had inquiries from people wanting to come out here. African game shooting was finished, leopard and tiger shooting in India was being curtailed and the last challenge to the red-blooded man was to catch a big fish. In 1966, Cairns had one boat, owned by George Bransford. In 1967 we had three, 1968 we had six, 1969 five, 1970 seven, 1971 ten, 1972 fourteen, 1974 twenty three, and 1977-78 twenty-five.

The value of these boats, cruisers, and mother ships has been conservatively put at \$3.8 million. That's a lot of money to be invested in floating palaces, but they were built in Cairns, Innisfail, Brisbane and Sydney, and that's all been ploughed into the economy of Australia.

The attraction of Cairns is that we have waters that offer more 1,000 pound fish than any other place in the world at the moment. We are the black marlin capital of the world. Since the beginning of the records of the Cairns Game Fishing Club in 1966, there have been 300 fish over 1,000 pound caught. Techniques developed by Australian skippers and boat crews are now recognised world-wide as the ultimate in the catching of these big fish. The equipment is even manufactured in Cairns and exported.

Since 1968, we have developed a program in which anglers are encouraged to tag and release fish. This program has been ably supported by the captains and crews.

We like anglers to weigh perhaps their first fish and bring it into the scale and hang it up and get their photo taken with it. We have been encouraged by various sections of the community to tag and release fish, and in so doing we know we are preserving our black marlin stocks. Despite \$3.8 million in boats berthed in Cairns, there will be no more game fishing in the Cairns region if there are no fish left.

We also tag and release in an effort to gain some knowledge of fish migration. In the first two or three years, we were getting quite confident that we had some idea of where these fish went. We had some recoveries on the South Island of New Zealand giving a fairly good indication that the fish moved south. Then to our utter amazement, fish were caught at Samarai. We also had some tags returned from the Solomons, thereby confusing the issue completely. We had them going north, east and south. We have a theory, but we haven't any real proof of where they come from or where they go to. A lot of fishermen have their own personal opinions. I personally think they come up onto the continental shelf and go back down the shelf. We have had fish that have been tagged at sea, released for 400 odd days and have been recovered. We record the area where they are tagged, the estimated weight, the angler and the skipper of the boat. These facts are then forwarded to the N.S.W. Fisheries. Previously we sent them to the Oceanic Research Station at Fort Lauderdale as we were using American tags and cards. Now I am pleased to say we are using N.S.W. Fisheries tags. We hope that the Queensland Fisheries Service will soon be instituting a tagging system as they are doing with mackerel at the moment. Some 1,100 tags were issued last year by the Secretary of our Club to boats that were fishing the Cairns area. Nearly 900 cards have been returned indicating that 900 fish have been tagged and released. We weighed 68 fish during that period. That means we killed 68 fish and put them on the scales. I think this gives some idea of the manner in which the captains and crews and the anglers are looking after the marlin fishing industry in the north.

Tagging is a treacherous business. When the angler and the skipper consider the fish is manageable enough, the fish is wound in. A boatman with a pair of gloves struggles with a 700-1200 pound fish on the end of a wire trace pulling it to the back of the boat. The tag, a metal tip with a plastic body, is inserted into the fish just near the dorsal fin, near the shoulder by a second deckhand using a long pole. The wire is then cut and the fish released. When the fish are tagged they are inclined to jump about. Some people say that the acids in the fish take from a fortnight, to six months to dissolve the hook.

One incident indicative of the effort of these boatmen handling tagging programs: we had one 900 pound fish in 1977 when the wireman took the wire, pulled the fish in and when the tag pole went in, the fish leaped up and speared him through the rib-cage. There was a bit of a hullabaloo as you can imagine. We transferred this chap to one of the faster boats,

took him into Lizard Island and the Flying Doctor dashed up there and brought him back. I went up to see him one day in hospital and I said to him "By God Jimmy, you're a bit lucky". He said, "Eh". I said, "That fish nearly got you in the heart". He said, "There was no worry about that Jock, my heart was in my bloody mouth!"

We now have something like 25 boats, most of which are based in Cairns, some come from Innisfail, Townsville, Brisbane and Sydney. We have private boats that come from Melbourne, Adelaide, and Perth.

In all, we have about 30 boats fishing out of Cairns during the big, or heavy tackle, season.

Game fishing is not like a duck season, there isn't a declared season. Game fishing in Cairns exists from the 1st January to the 31st December. Sporting light tackle fishing takes place from January through to August. Light tackle tournaments are usually staged in July and August. The professionals, in conjunction with the Innisfail Game Fishing Club, conduct light tackle tournaments from Dunk Island in July. Innisfail and Cairns have a light tackle tournament in August and the fishing is tremendous. Then they move onto the big fish time which goes from August to December. The big season exists for about 120 days. Of that, about 10 days are lost to the boats in revictualling and recharging the batteries of the crew. About 500-600 guests come from the United States, Spain, Germany, Brazil, Equador, Tahiti and New Zealand. I think a lot of them travel first class, they bring their captains and crewmen, their wives or their girlfriends. We particularly ask them not to bring both - we don't want any trouble. These visitors spend something like \$700,000 in overseas airfares. They then have to come from Sydney or Brisbane to Cairns and that's not cheap. Then there's all the Australian anglers who travel to Cairns and they bring their wives, and that's not cheap. So you can easily see that in airfares they spend something like a million dollars getting to Cairns. They stay overnight in Cairns during the early part of the season. Then they go out and join mother-ships and on the way back we get them coming and going in the hotels. In the latter half of the season, they fish out of Cairns. They pay \$300 to \$350 per day for a boat or up to \$600 or \$700 per day for some of the complete boats where they sleep on board. They have to pay \$200 to \$300 per day to stay at the mother-ship when they stay behind the Reef and they sleep on board the mother-ship and fish on the game boat. The big game fishermen

bring with them a certain aura and glamour which the media pick up and dispense through their various papers and periodicals. We get stories of people like Lee Marvin, Jack Nicklaus, the late Gypsy Rose Lee, and Bob Dyer, a great fisherman who in the old days was a great TV personality.

They bring publicity, writers and journalists who write in all the big selling magazines of America and the world, and they speak about the big fish and these glamorous characters who come to fish. They speak about the top class gamefishing boats, about the quality and techniques of the crews and the skippers. All this has made headlines in large circulation magazines throughout the world, gaining for Cairns an untold amount of publicity which no tourist organisation could possibly have afforded, and we got it for free.

Everybody, if you travel around, knows where Cairns is. "That's the place on the Barrier Reef where they catch them big black marlin". And this is so.

The boats have to come into Cairns for maintenance. It costs a lot of money, something like \$10,000 per boat per annum is spent in Cairns. The victualling is done in Cairns. Tourists and travellers shoot miles and miles of movie film. They don't buy movie film by the packet, they buy it by the carton and take it out and reel it off - 35 mm action shots, they take the lot. But its the hardest thing in the world to get a copy of what they have shot. They hang on to it. I've been asked on several occasions for shots of jumping marlin and its the hardest thing in the world to get them. All this has been done with the energies of the Queensland Game Fishing Association in conjunction with the Cairns Game Fishing Club.

DEVELOPMENT FORMS SUITABLE FOR THE OVERSEAS MARKET

by

STEPHEN LE PAGE
(Australian Tourist Commission)

The scope of the topic set for me quite frankly is enormous and I have taken the term "development forms" to mean the more precise but all-embracing term "tourism product". By this I mean all those facilities, services, attractions and resources which, at one time or another, are used by overseas tourists during their stay along the Queensland coast.

Over the past decade the growth in overseas tourism to Australia has not been spectacular, but it has been reasonably steady with an average annual growth of about 10%. In 1968 we received 237,000 short term visitors. Ten years later, in 1978, the inflow had increased 2.6 times to an estimated 606,000 people. Incidentally, these are correct figures.

Bearing in mind the unfavourable conditions for international travel which have prevailed throughout the world in recent years, such as sluggish trade and investment, high unemployment and inflation and persistent payment imbalances, the latest annual increase of 7.6% (from 563,000) is reassuring. In the past Australia has faced considerable disadvantages as a tourist destination, and the fact that our share of world tourism and Pacific tourism arrivals has been maintained at 0.23% and 3.9% respectively is, I think, quite a laudable achievement.

Over the years the nature of overseas tourism to Australia has not changed markedly, with the proportion of discretionary (purely holiday) travellers hovering above the 60% level. Our most important origin market is New Zealand, followed by the United Kingdom, the U.S.A., Japan, Canada and Germany.

The prospects for further strong growth in the number of visitors to Australia are favourable in the short term because recent airfare cuts represent a reduction in the real cost of travel relative to other consumer costs. Additionally, Australia's moderate inflation rate (contrary to those overseas) and the relative parity of the Australian Dollar, currently serve to highlight the attraction of Australia as a destination.

Furthermore, in recent years the Australian tourist product has improved in range and sophistication and this, combined with better planned and more specific marketing and an increased number of experienced travellers looking for a "new" destination, augurs well for continuing growth.

In the light of these factors the Australian Tourist Commission now forecasts that in the next four years visitor inflow will rise from 606,000 in 1978 to over 960,000 in 1982, with the proportion of discretionary travellers also rising to about 68%.

All very well, you may say - but just how important are overseas travellers to the Great Barrier Reef Region? A question which has been asked several times today.

By far the major proportion of the current business of tourism enterprises along the Queensland coastline originates from domestic (southern) sources. The number of overseas visitors is comparatively minor, and surprisingly so, given the exposure and marketing emphasis afforded the Reef in overseas markets.

The latest data we have is that from the Australian Tourist Commission's international visitor survey of 1974/75, which showed that less than 30,000 people from overseas visited the Reef and the far North Queensland coastline. This represented less than 6% of the total overseas inflow to Australia at that time. These are the most accurate figures available in Australia.

The length of stay of overseas visitors on the Reef itself averaged four nights in 1974/75, but because of the structure of holiday packages and changes in the nature of resort operation the length of stay is assumed to be much longer now. On the coastal region in 1974/75 duration of stay was approximately eight nights. Europeans and Englishmen are the longest stayers on the Reef while New Zealanders stay the longest on the coast.

The major sources of overseas visitors to the Barrier Reef Region are the U.S.A. (from which came 25% of visitors in 1974/75) New Zealand (23%) and Europe (13%). I doubt whether the proportions have changed much over the years, although there is evidence of an increasing number of Germans and Japanese.

A most important feature of the overseas market generally is that it is most in evidence during the local off-season. We know it's not the largest in existence here but it is an important seasonal off-setting factor. Thus, with appropriate marketing, individual operators can negate the effects of a domestic downturn. I believe Australians tend to be hyper-sensitive about the weather (perhaps because we have it so good most of the time) but most overseas travellers are quite prepared to take it as it comes provided they are forewarned or an incorrect picture is not painted. The point of Captain Maclean's, this morning, about the viewing of the Reef in times of bad weather is quite pertinent in that respect.

It is important to recognise that the overseas market is not homogeneous and that considerable opportunity exists for individual operators to gear or position themselves in their marketing approach so as to take full advantage of differences in the needs and desires of prospective tourists.

Again, clear differences exist between the needs of the domestic and overseas markets, with the former probably being most readily characterised by a higher proportion of families, a heavy preference for car travel (though this is also variable according to origin etc.) and probably with a preference for lower cost and "no frills" accommodation. These distinctions are relevant if an operator wishes to cater for both the overseas and the domestic market. The two segments can be complementary, but care should be taken to prevent emerging conflicts such as might exist in the case of an island resort catering to bus tour operators using two day stop-overs and day trippers, while simultaneously approaching the overseas market for longer get-away-from-it-all tourists.

Within the overseas market differences exist between origin countries. Following are a few brief and general sketches of travellers of various nationalities. I might point out that despite the changes in airfares and thus the broader appeal of Australia as a destination, the basic traveller type (to the Barrier Reef anyway) will not appreciably change in the short term.

U.S. travellers to the Reef might well be:

- travelling as one of a pair;
- on a pre-booked package tour but moving independently;
- probably already well travelled and well informed on what they should be seeing;
- primarily dependent on air travel and conscious of how their time is being utilised or wasted;

- well educated, with an enquiring and detail-oriented mind. They are likely to ask questions like "How many coral polyps are there to the square inch?" or "How old are the islands?";
- fastidious about accommodation standards and food preparation.

The German traveller to the Reef area is likely to be:

- individualistic and possibly looking for excitement;
- more activity-oriented than other travellers but with the activities more self-related such as snorkeling, scuba diving, fishing, horse riding and so on;
- they accept accommodation without "frills" provided it is "spic and span" and well organised. The basic product (the ability to experience the Reef and tropical waters) must be up to expectations;
- seeking entertainment and diversity in the evening.

The Japanese traveller to Australia is likely to be:

- moving in a group;
- wanting to participate in adventurous activities (but in a group);
- fairly particular about food but less so about accommodation.

The Japanese at this moment are not significant as Reef and coastal visitors, but as investment increases and the established carrier links become more popular, promotion will increase and so too will interest in Australian tropical areas. The group syndrome is likely to persist for some time because of language problems and traditional and social factors.

The English (UK) traveller is probably:

- cost and "value for money" conscious in both food and accommodation;
- individualistic;
- if in Australia to visit friends and relatives may well have an incorrect and superficial knowledge of the Reef;
- here mainly for the sun and tropical atmosphere and may regard the technical and educative aspects of the Reef as of secondary importance.

The New Zealand traveller, for the purposes of this brief scenario, might well be regarded as similarly motivated to the domestic market.

The segmentation exercise can be extended so as to identify specific groups, within origins with compatible primary motivations for travelling to the Reef. In other words, through appropriate research it should be possible to identify the existence and characteristics of groups with special interests - say scuba diving or game fishing - and accordingly create or develop tourist products which will satisfy these groups.

Of what relevance are these identified market characteristics to the Great Barrier Reef tourism product?

Firstly, they highlight the need for far better attention to the educative aspects of the Reef area and the creation of tour products with elements of challenge, adventure and authenticity. There is a group which seeks the "real McCoy" and will not be satisfied with any less. But how far have we gone with interpretation and information facilities which might hope to augment the physical resource and satisfy this thirst for experience and knowledge?

Not far I assure you. There are some commercial operations purporting to be marinelands and coral wonderlands but rarely is there a concerted effort by officialdom and private enterprise to enhance interpretation. Very few, if any, facilities exist which can, in my view, hold their own as complete, scientific, tasteful and interesting interpretation centres for visitors to the Great Barrier Reef.

This can be attributed to under capitalisation; a lack of expertise; to the likelihood that the business started as an extension of a personal interest; or to the absence of governmental advice and assistance (or even to conflicting requirements by various levels of government).

One or two island resorts make an effort to fully involve their guests and assist in the interpretation and presentation of the reef and island ecology, but the tardiness of others catering to the same market and even partially emulating them is astounding. All resorts should really, as a matter of course, be providing island and reef guides who really know what's what, as well as conducting class room and briefing sessions on local wild life, flora and points of historical interest.

In my view there is a need for official interpretation facilities with the following features:

- primary location at points of highest public use, but with ancillary operations in parts of the Reef of special note;
- provision of recorded multilingual commentaries and precise and interesting written descriptions of all aspects of coral and marine life; and
- scientific affiliation, back-up and staffing.

I might add that the Great Barrier Reef Marine Park Authority exists and can assist individual operators in setting up and compiling interpretation facilities. It's then a matter of private operators asking the Great Barrier Reef Marine Park Authority for that assistance.

The few tropical adventure tourist and scuba diving/fishing tours which already exist provide a good service, with the operators earnestly seeking out the best venues for participation or description. But more tours are needed and regional and State tourist authorities could well combine with reef and wildlife specialists and with existing local tour operators to produce truly representative and outstanding tour products for marketing overseas.

One feature which could boost the patronage of these products (and perhaps justify the extra costs likely) is the award of an authoritative stamp of approval, either from the Marine Park Authority, regional bodies or government.

The era of special interest travel is in full swing and the Great Barrier Reef is a gigantic special interest in its own right. At the moment it is wasted. By way of example, the latest special interest tour brochure issued for the North American market by a major airline servicing Australia only mentions Heron Island and Cairns as sites for bird-watching. There is no mention of the wonderful tourist spectrum of reef-walking, scuba diving, snorkelling, fishing of all sorts, and sailing. Why?

Another product ramification is the clear need to identify tourist facilities as being truly Australian.

For Australian distinctiveness perhaps an appropriate measure is to make architectural reference to an historical age beyond contemporary interest, say, an Australian squatter's homestead of 1880 vintage, with wide verandahs and functional environmental cooling incorporated in the design. A building along these lines has proven successful at Lizard Island while the new accommodation facilities on Dunk Island have a similarly arresting and suggestive roof line.

Reference to a sufficiently removed era will reduce the tendency of the building to age in consumers eyes and in addition, emphasizes the Australian nature of the destination.

I do not believe it necessary or even desirable to attempt to air-condition accommodation units on islands along the coast, provided they are sited and designed so as to take full advantage of cross-draughts, are insulated, have ceiling fans, the windows and walls are shaded by wide roof overhangs, reflective surfaces on the ground and surrounding buildings are minimised, and concealing, shady foliage is encouraged. Of course, if they haven't these features - and many of the older resorts fall in that category - then air-conditioning might be the right answer.

Attention to detail inside the unit is imperative with private facilities generally a must, but carpet totally unnecessary and often counterproductive. Additionally, and many operations fail to recognise this, there is enormous scope for indoor plants, hanging baskets, and flowers in the rooms. So many times you go into a resort anywhere along the coast and you could be in a country motel in New South Wales. Where is the image that Doug Nettleship was talking about before? There isn't any.

Another product need is to encourage overseas visitors to meet Australians.

This seemingly insignificant factor - that Aussies are an attraction in themselves - is often overlooked by resort and attraction operators. Yet it is clearly one of the most important elements for an enjoyable holiday for overseas people. They do want to mix and swap experiences with us. Yet, as a generalisation, few resorts really put effort into encouraging people to mix, or in making situations conducive to this.

The relative emphasis to be employed obviously depends heavily on your market. Thus, for Great Keppel and younger groups, the successful mixing of guests is an imperative for continued success and this is recognised fully by the management. However, for those resorts employing a fixed dining table routine, or even "leaving things to take their course", I suggest that social intercourse is minimised and that the amenity derived by guests is thereby lowered. Some resorts, like South Molle, have a "Happy Hour" to encourage mixing.

Perhaps a lesson could be taken from the success of international operations like Club Med, which strongly emphasises guest inter-relationships. While a facility of the same lines as Club Med may not prove viable under local and Great Barrier Reef operating conditions there is no doubt that lessons can be learnt.

Overseas visitors also require a wider range of food and bar services on land resorts than is currently provided.

I believe the "all-inclusive" tariff structure which is pretty much common to the islands must eventually be replaced by a range of food and service facilities catering more realistically to different visitor requirements.

My arguments for change are encapsulated in the following points:

- customer demand for more sophisticated and differentiated food and bar facilities will increase because it is increasingly common overseas for self-contained resorts to provide a range of dining facilities such as an intimate a-la-carte restaurant, a bistro or self-service affair, a snack bar and food-to-go facilities, all of which are open long hours;
- the pursuit of individual activities by guests sometimes conflict with established dining hours; and
- introduction of a room only tariff will immediately improve local products' competitive pricing position vis-a-vis overseas products and will allow the customer greater individual financial flexibility.

Such a change-over (from 'all inclusive' tariffs to 'room only' tariffs) does have some associated problems, such as the employment of additional staff, increased localised administration and financial management tasks and so forth, but I believe that with increasing sophistication of the market it is only a matter of time before this development must ensue.

As a development priority there appears to be a need to protect the interests of resort stayers against the encroachment of day-trippers and to rationalise any conflicts of interest which may arise.

No one denies that day-trippers have the right to regard islands and national parks as their own particular domain and to revel in the Australian traditions of free access and use of the public reserve. In fact it is highly desirable that such usage be increased and that the social amenity derived from day-tripping activity is maximised.

But sometimes a conflict of interest and management can arise when day-trippers not only want to experience the national parks, but also wish to partake of the services offered by the nearby resort facilities for their guests (and participate for a day in the life and atmosphere of the resort) but without paying for it.

Along the Great Barrier Reef there are a number of islands and resorts where day-tripper pressure is evident (on the operations of the resort rather than the protected environment).

In one or two cases past management appears to have been totally reluctant or unable to come to grips with the conflict of uses, with the result that the standard of experience derived by both groups has diminished. In others, management has correctly perceived the need to preserve the integrity of the resort area and has introduced measures to ensure that day-tripper impact is minimal. On other islands, because of either legal or traditional factors, the question of day-trippers versus staying guests is still unresolved.

It is obvious that the Queensland National Parks and Wildlife Service is stretched to its utmost in ensuring standards and the environment are maintained in all its parks. In point of fact, much of the practical management apparently devolves onto resort managers, as they have a vested interest in ensuring that the immediate environment is suitable for their guests.

My suggestion and it is only a suggestion - is that this workshop might give some consideration to whether some official recognition could be afforded to this already existent defacto arrangement, so that the resorts on national park islands might be made responsible for maintaining the reserves - but as a quid pro quo - the National Parks administration could adopt a more flexible approach towards resorts and afford the latter a greater degree of initiative and independence in dealing with, and catering to day-trippers. The appropriate government body would always retain a supervisory and regulatory role.

This latter concession may involve or require a resort establishing separate facilities of a commercial nature adjacent to or on crown land (if there is insufficient room on the resort) specifically to cater to day-trippers.

To cater for increased flows of overseas visitors as well as growth in the domestic market there is a need for further large scale, capital intensive investment in resorts and tourist equipment.

Up to the late 60's much of the tourist development along the coast and on the islands stemmed from private individuals who, while in no way lacking in imagination and foresight, were somewhat strapped financially. The resulting developments reflected this under-capitalised situation in the standard of facilities and service offered.

The past 10 years has seen larger, more diversified companies extend their operations into the tourism destination field, with a resultant widespread refurbishing of plant and facilities. This has also been matched by an expanding number of professional managers so that services have also improved. Marketing too has come of age so that the entire region has benefitted from the wider exposure and, via the involved national carriers, it has been made available for booking throughout Australia and the world.

From the overseas market point of view this change in operational format has been most significant. A major constraint on effectively marketing the Great Barrier Reef as an attraction has been the problem of appropriately accommodating overseas visitors on a value for money basis.

It may be, that while value for money is now offered, overall capacity may soon lag behind. Certainly, accommodation operators have excess capacity during the domestic off-season but they are often full for the six months of the high season. The new international airfares may increase accommodation pressure during the high season and shoulder periods, while other factors ensure continued overseas demand during the off-season here.

I believe it is a fact of life that to successfully develop an island or coastal resort suitable for domestic and overseas markets, it now requires financial resources far beyond the reach of most individuals. Waste disposal and environmental requirements; high accommodation standards; the high standard of staff facilities now regarded as almost mandatory; the need to provide a very wide and usually capital intensive range of ancillary services and activities; logistics and management problems; the need for competitive marketing; all these militate for the development of resorts where economies of scale can and in fact must be achieved.

This does not necessarily spell the end for the smaller, perhaps privately owned, facility provided the operator has correctly positioned the facility to a specific market segment and is an aggressive marketer.

But it does indicate that future development and expansion of facilities will involve large scale investments. The Iwasaki proposal for Yeppoon is perhaps an indication of things to come. In this regard the importance of overseas investment in the tourism industry cannot be underestimated. The Iwasaki proposal is a clear example where overseas institutional and private investors are prepared to risk considerable sums for far longer periods than local investors and where Australian time horizons for commercial success may not be applicable.

Again, while it may be seen as desirable to expand Townsville airport to international status, and such would undoubtedly assist overseas visitor access to the Reef areas, such an upgrading should ideally be accompanied by a concomitant increase in accommodation capacity at accessible centres along the coast and island chains. We heard a lot this morning about what would happen if we had two or three plane loads of people coming. Unfortunately we could not accommodate them at the moment.

Without sufficient accommodation capacity in a form suitable for overseas visitors (capable of being integrated in international airline packages), and without sufficient investment in ancillary services and plant, it just might eventuate that the international airport for Townsville may not be an attractive destination for the airlines and this in turn would reduce the argument for upgrading the airport. It's that chicken and egg argument once again.

Additionally, one can expect major changes in the infrastructure servicing the islands and the Reef. New underwater observatories will be served by faster surface vessels such as hydrofoils and hovercraft.

The outer Reef will also become much more accessible to the short staying overseas visitor and the longer staying domestic holiday makers. Where at present, usage of the outer Reef is limited to the passengers of laborious boats or those availing themselves of amphibious aircraft services, the spectre of heavy day-tripper use of fragile, remote reef outcrops should be entertained right now.

So far I have spoken on products mainly in the physical sense of plant and equipment, but there are any number of innovative organisational or tour products which might be introduced in the light of perceived market demand, particularly in the special interest field. These might be commercial or simply offered as an adjunct to an existing business.

Examples which I believe show considerable enterprise and deserve to succeed are:

- the amphibian aeroplane tour of Hardy Reef operated by Air Whitsunday out of Shute Harbour. An excellent service at a reasonable price is provided but, more importantly, it provides an alternative to a boring boat journey and enables a quick but equally comprehensive, inspection of the real Reef. Combined with boat accommodation on the Reef and the provision of scuba diving excursions and instruction the whole exercise must be attractive to quite a large slice of the younger Reef market;
- the provision of mother boats for game fishing fleets operating out of Cairns. These provide a real service to both the boat operator and the fisherman, and by ensuring a successful holiday, add considerably to word of mouth promotion of the region;
- the special interest programs on birds, marine life and plant ecology conducted by the Heron Island resort, both as an aid to product interpretation and as an offsetting influence to seasonality problems; and
- the bareboat yacht chartering operations now underway at Shute Harbour. That there is a national and international market for this type of tourist product is clear, as is the enthusiasm with which the operators have geared in their marketing and publicity measures.

In conclusion, I would like to make one further suggestion and issue a friendly and timely thought to ponder.

I believe there is a valid need for operators to develop a regional promotional and developmental concept while each operation still maintains (or takes up) a specialist operating stance in relation to identified market segments.

I do not mean this in the sense that more organisations are needed although such might be the case. It is mentioned to bring forward the fact that many reef and coastal facilities are complementary or sufficiently different in their inherent features as to combine readily in some promotional ways.

Nevertheless, as I earlier pointed out, specialised tourism is on the increase and resort or attraction operators must, above all, assess their market potential and orientate their entire operation so as to cater fully to that market segment. To the extent that their specific and regional interests are complementary, then these should be pursued, but there is no point in all operators reaching for the same apple in an overfull basket.

I am sure that if one message comes through strongly at this workshop it will be the need for market research and for operators to position their facilities. One early step which can be taken is the analysis of current business to identify characteristics, levels of satisfaction and unfulfilled desires. How many resorts actively solicit guests' views and analyse registration forms? In my experience, not many. In fact, I have only come across one, South Molle, where questionnaires were in the room.

Finally, while the Great Barrier Reef is a magnificent and unique phenomenon, coral formations in themselves, are not. There are many islands in the South Pacific, and particularly in Papua New Guinea to the immediate north of us, where coral formations are, to a layman like myself, the equal of, or better than, those found along the Great Barrier Reef.

Remember, while the Reef itself may be 2000 kilometres long, the international and domestic tourist usually experiences it at only one or two locations. His view and experience is therefore localised, and being so constituted, is easily transportable, to another island, or another country.

WORKSHOP SESSION THREE

REEF TOURISM AND NATIONAL PARKS

(Chairman: Dr Des Connell, School of Australian
Environmental Studies, Griffith University)

Tourism and the Environment
of the Great Barrier Reef
and Coastal Areas

by

JOHN LUSCOMBE
(Manager, Islands Management Pty Ltd)

A Hundred Islands for the Price of One - A Place to
Come Back From Feeling As Though You Need a Holiday - Just a
Drop in the Ocean - etc., etc.

All good catch phrases are part of the schemes
involving segmentation of the marketplace, but each of us is
responsible for peoples' enjoyment of one of the special
natural areas of the world - The Great Barrier Reef.

How we go about protecting this resource asset, and at
the same time ensure that it is used to its maximum for the
benefit of human experiences, can be summed up in the United
States National Parks Service philosophy -

PRESERVATION + USE = CONSERVATION

Why did the tourists come? Let's just think back.
One of our islands was a retreat for a businessman escaping
pressures of the city, another was a grazing property, others
turtle factories, and the first tourists came because they were
inquisitive and wanted to experience the idyllic life of the
islands, to get away from the "rat race" of the mainland.

Today I believe people are still coming for exactly
the same reasons, but instead of just coming from areas along
the Queensland coast, they are coming from all over the world.
As the world as we know it has become more and more urban, the
need for people to get away to natural areas is becoming
greater. So of course are the tourist areas that they can
visit.

It is therefore, I believe, incumbent upon us to be fully aware of the major natural asset that is ours - The Great Barrier Reef. Surely this is the one thing that separates us from the rest of the world's similar resorts? And if in fact this is what is drawing people from overseas and Australia - are we using it sufficiently and correctly, thus protecting our asset?

PRESERVATION + USE = CONSERVATION

It's a simple formula but of course it won't work unless people want it to. If we want the Reef and the islands to survive, then we must use them wisely. Whether we are talking about the coral, the myriads of fish, or the abundance of trees and bird life on the islands, we must realise that they are fragile and irreplaceable and incorrect or ill-informed "use" instead of assisting with conservation can assist in total destruction.

Already the signs that we are not doing our job in preserving our asset are there. Walk or snorkel along a well walked reef trail area, where boats anchor when visiting the Reef, and you will find soft drink cans, plastic bags and general litter. Wander along any one of the well advertised island-beaches and you are bound to find the inevitable broken stubbies.

One of our opportunities in this industry is to bring man and his environment into closer harmony. We have an opportunity of not only preserving our own areas (and assets) while the visitor is under the spell of the Reef, but also by doing so, enhancing his holiday, and thereby creating the desire for him to return to this environment in the future.

So you can see that if you accept this responsibility there is a pay-off. The benefit to the environment is that we may have created a person with a new awareness who on his way home, will see the contrast between the cities and the farms, between the clouds gathered on the mountain tops and the pollution hovering over the city.

The final pay-off is of course the person who sees the difference between the high-rise holidays and the plastic worlds of make-believe and the relaxed, clean environment of the islands.

IS THIS OUR RESPONSIBILITY?

In the past, the original island people (the Nicolson's, the Mountney's, the Poulson's, the MacLean's, etc) all ran small, informal resorts and had the time to be with each individual guest. They provided "interpretation" as it's known today. But who has replaced them?

The need today is greater than it was then. Just the sheer weight of numbers and the fact that we are dealing with the inquisitive and not just the converted - "Can I take home this lump of coral? It was broken anyway". "I'd just love to have that shell for my mantelpiece." "Well there's nobody here to stop me anyway." I guess if we listened hard we would hear these comments dozens of times a day, but is this our responsibility? Shouldn't this be the government's job? We get back to why are the tourists here? We are providing an opportunity for tourists to enjoy and relax in the environment, therefore the environment is an asset and a reason, and I believe, a responsibility.

One way of achieving some of these goals and ensuring that the expertise is available to everybody so that the information disseminated is accurate, is to form an organisation incorporating the private enterprise people running the islands, the government, semi-government, and authorities involved in the area. This organisation is called the Great Barrier Reef Parks Association.

It seems coincidental but relevant that one could describe the purpose of the Great Barrier Reef Parks Association in almost identical terms used to describe interpretation. They are:

- (a) to enhance the visitors enjoyment;
- (b) to inform and educate the visitor about the resource as a whole;
- (c) to relate the resource to the experience of the visitors; and
- (d) to protect the resource.

The organisation was formed during 1978 and the different authorities have advised they are enthusiastic to see all tourist establishments form their own branches for their specific area. Of course the governmental authorities will change from area to area, however we can be assured of their co-operation as the organisation is of benefit to everyone. Those who have formed Chapters are seeing the benefits in various areas of assistance.

Already a few of the resorts have lightly touched the areas of interpretation with displays of memorabilia - flora, fauna and shell exhibits, orientation walks, and boat trips. However we need to go further. Accuracy in interpretation is needed. On four islands I have heard four different stories of the Reef, all conflicting. As a result, the credibility of the resorts as environmentally aware places was questioned in my mind, and no doubt any other visitors with similar experiences.

With the assistance of the Association, accurate inexpensive pamphlets can be prepared for distribution to the public. Assistance with training of specialised personnel can be gained, as can the preparation of environmental programs.

The title of Entertainment Officer takes on new meaning. For interpretation is not merely being an entertainer, it is a communication art designed to reveal meaning and significance. He is a conveyor of practical history in artistic perspective, a naturalist showing the inter-relations of systems and their components, a nature guide focusing on the wonders of the natural resource, an educator trying to increase understanding and influence behaviour, an information specialist emphasizing public relations, a community singing leader gathering a group around a camp fire, or just one of the kids sitting in a circle telling a story.

Of course he has to be all of this for it is his job to meet and work with the average visitor.

Average visitor? That's the mythical character that doesn't really exist. Our visitors differ widely in ages, educational attainment, interests and goals to be achieved within the natural leisure setting. Many come only to enjoy a social outing, but nearly all visitors have experiences influenced to some degree by sociability. This is part of the job of your interpreter (Entertainment Officer) but is this just a job, or is it a responsibility we have, not only to the tourists but the area that we purport to represent?

It would seem when you take a close look at us that we are not far removed from the turtle factory owners of the old days - taking everything and giving nothing back. We use the area, or should I say "abuse" the area. If we are going to take the wonders of nature and sell them as a commodity, then we have a responsibility to service that commodity.

Perhaps through an awareness of the environment we will be able to present a single front to the world of tourism. Who's ever heard of Thunderbird Lodge? Probably no-one in the room, but I am sure you have all heard of the Grand Canyon. Heard of Ahwahnee Hotel? No? But I'm sure everyone knows about Yosemite National Park.

In our case its almost the opposite. This area which represents a combination of some of the most scenic parks and places in the world continues to present itself as a fragmented, hotch-potch of little developments that put out in small quantities, hundreds of different brochures and magazines that are not good enough in quality to do justice to the magnificence of the area. The result, according to the Australian Tourist Commission figures, is that of all overseas entrants through Sydney airport, only 4% get to visit the Reef.

It's quite obvious that we can expect an increase in the number of tourists coming into this country, not only because of cheap fares but also increased affluence in other societies.

It is generally obvious through changes in schooling at all levels, and general increased awareness of the environment, that the travelling population is more environmentally aware than it has ever been. Let us become aware of the great natural wonder that we have in this area. Let us not be fragmented but stand together and present to the rest of the world, one of its highlights. Obviously it is going to cost each and everyone of us a little more to create the environmental awareness that is needed through increased programs and the establishment of a single image, but the returns to us could be far in excess of those we are currently envisaging or receiving.

Why do we expect people to pass over Fiji, Tahiti, Honolulu, Mauritius and similar places to come to this area, unless we can give them something really special?

At this point of time, I do not believe we are delivering the goods, but I do believe we have the potential to do so. Equally, one might say in these days of cheap airfares: why should Australians stay at home when even to them we do not present the image that we should?

Perhaps in the philosophy of

PRESERVATION + USE = CONSERVATION

lies the secret. Not only the conservation of the living things of our area, but the conservation of our industry.

Discussion (Chairman - Dr Des Connell)

GORDON MCKAUGE, Laroc Pty Ltd: I'd like to compliment you on an excellent paper. It has an obvious deep awareness of what we know of the Reef and the attitudes of people to the Reef. I agree wholeheartedly that we must all be telling the same story, but we must tell people about the Reef in a way which excites them, which gives them something with which they can associate. For instance, they can associate coral polyps with animals. People should not be told just what academics decide they should be told.

JOHN LUSCOMBE: Thank you, I agree and I'll answer your statement which I think is important. You refer to academics; I used to dislike, distrust, and was not very strong on them at all, as most of them will tell you. We're not talking about academics any more. We're talking about interpreters. There is a difference.

Interpretation is a creative art. These guys are professional interpreters. I've been to some of their courses and had the privilege of working with them. They study what the people want. That's their job. They're not the bachelors or scientists and the Doctors and the Masters that we're perhaps used-to-coming across in our resorts in our areas. They are a special breed of people of their own. Each of the Departments has their own interpreters. If you've ever gone with the famous turtle man for a walk at night, nobody could ever call him academic. He might be, he certainly is. I'm talking about Col Limpus, from Queensland National Parks and Wildlife Service, but the thorough and total enjoyment you get from being with them and you only get that by them knowing the academic facts and then being able to put them across. That's interpretation. You'll have Peter Ogilvie from Queensland National Parks and Wildlife Service up here shortly. You'll get the message one way or the other. Pete's probably the best interpreter in our State. He's heard me say it openly so many times now, he's going to be all nice and embarrassed. He's an academic but he's an interpreter, so please don't mistake what I'm saying when I say the Departments will give you the information. Their interpretive and specialist services will give you the information, written in a simple form that people can understand, but also it's like anything that you give, if you want a kid to swallow something miserable, you put a lot of sugar on it. We still want the message to get through. Don't let's cloud it with thinking that we're comedians and entertainers. Sure that's part of our job. But part of it's to get out this stuff that people know about. Just get that little bit of information that makes a wonder out of it.

JOHN PIGRAM, University of New England: I wanted to take up a comment that you made in relation to something I said yesterday, about that very important component of the tourist population, the kids. I was suggesting yesterday that we should promote more to the kids. In my view they are very influential decision makers. You have brought out a very important point: that if we want to promote environmental awareness, the most environmentally aware segment of the population today are the kids.

JOHN LUSCOMBE: I agree entirely of course. I didn't mention children a lot because I wouldn't like to advertise Lindeman's environmental program in front of everybody.

GERRY SUTTON, North Brisbane College of Advanced Education: I'm in the business of training young people to serve in this area of environmental education. Are your requirements open to us? I have 54 people between the ages of 17 and 35 who are wanting jobs at some of your establishments. Right now they're learning how to teach and to react to people in a fairly nice way. Are your entrepreneurs open to invitation to show us what you want.

JOHN LUSCOMBE: I'd like to clarify that. Gerry Sutton is not job seeking. We have two of the students coming with us to help us with a program on children and the environment. We're giving them lodging and transport, but they put their own time in. Sutton's people need a lot more tourist areas where entrepreneurs who are genuinely keen on doing something about their environment, are prepared to accommodate one or two of them, preferably in pairs, because they don't feel lonely then. Put them up and let them work with you for three weeks on a specific interpretative project. It'll help you a little in the short term. If you want to do this, please see Gerry, I can guarantee they're good people. Help them - maybe it'll help us in the long term.

Tourism in the Environment

by

DAVID COLEMAN
(Tropical Queensland Tourist Association)

To effectively study tourism within the environment of the Great Barrier Reef, we must consider its place in the environmental pattern of Queensland. Tourists come and will continue to come via the coastal towns. The continental islands, coastal roads, and even the hinterland form part of that package which is popularly known as the Great Barrier Reef.

'Tourism' for my purpose today means travel beyond the confines of one's home and the enjoyment while away of leisure, change or recreation, or a combination of all three. 'Environment' means the surroundings in which this travel and enjoyment take place. 'Conservation' means the use of a resource without diminishing its quality or endangering its supply. This glossary of terms will not please everyone.

In this paper we are going to consider:

1. The requirements of the tourist from his environment.
2. The impact of the tourist upon his environment, and
3. How this impact may be mitigated to serve the requirements of the tourist and to preserve as much of this environment as possible for all sections of the community and for future generations.

These three headings must be considered within a total framework of urban, country and coastal environmental divisions, otherwise we shall fall into the trap of partial thinking about a subject which can only be whole and indivisible.

THE REQUIREMENTS OF THE TOURIST FROM HIS ENVIRONMENT

Tourism and the environment are inter-dependent. For many tourists the basic ingredient of sun, sea and sand must be present, or at least available just over the hill. The environment consists of the landscape, the beauty of coast and countryside, our offshore islands, flora and fauna and by no means least the lure of an historic heritage in timber, block and stone. One or all of these ingredients tourism demands - or there can be no product.

For this reason nations rush to restore their beaches after oil spillage. The Netherlands belatedly rescues the last of her windmills. Britain seeks to preserve the last remnants of the Industrial Revolution. Ireland refurbishes her cottages. The chateaux of the Loire gain a new lease of life. Australia discovers the pull of her gold towns and America rediscovers her colonial past. For this reason too, international money flows into the coffers of Florence and Venice to ensure their continued preservation.

History, tradition, customs and characteristic scenery, buildings, monuments and food bring the tourist and the tourist brings the money. It is that simple or difficult.

What then is the quintessence of Australia?

The one natural phenomenon that captures the imagination of the overseas visitor, that gives an immediate corporate identity to Australian tourism is, the Great Barrier Reef.

Its preservation and conservation is essential to the Australian tourist industry and of course to Queensland in particular.

THE IMPACT OF THE TOURIST UPON HIS ENVIRONMENT

Let us now consider a number of prime factors arising from tourism which impinge on the environment and affect the environment in varying degrees of intensity.

To do this let us consider the special impact that tourism exerts on:

- (a) the urban and historic heritage;
- (b) the countryside;
- (c) the coastline of Queensland and the Great Barrier Reef, and
- (d) general impact factors that affect all three including that insidious enemy - overexposure.

(a) The impact of tourism on our urban and historic heritage

The world has a breath taking treasury of historic cities and towns, tombs, cathedrals, historical castles, houses and gardens, ancient monoliths and archaeological sites of all kinds.

They have been called civilisation's memory and memorial.

They are usually beautiful. They are always irreplaceable. This heritage is under constant attack by decay, pollution, neglect, war or by the more mundane forces of urban renewal and road construction.

The laws of no country are inviolate and what is conserved today can be destroyed by legislation tomorrow. The future will show the depth of our values and whether the temporary expedience of these demands will draw upon us the curses of future generations.

(b) The impact of tourism on the countryside

As tourist pressures on our cities and coastlines increase a corresponding and increasing emphasis is given to the development of rural tourism.

The type of tourism best suited to a countryside environment is undoubtedly self catering such as caravanning and camping, farmhouse accommodation, cottages and chalet development all of which are daily increasing in importance.

(c) The Impact of tourism on the coastline of Queensland and the Great Barrier Reef.

The coastal landform of much of the world follows closely our pattern here in Queensland. Historic and modern routes thread between mountain and sea.

The building of harsh coastal roads has scarred ribbon development along many a scenic coastline. Coastal dunes are particularly susceptible to tourist depredation along with unique and often beautiful coastal vegetation. Private development can block access to the sea for long distances and lack of coastal planning can create a nightmare of urban sprawl which begins not far from the high water mark. This can come either in concrete boxes or in regimented bungalows.

The continental islands of Queensland and the cays and reefs of the Great Barrier Reef are perhaps among the most delicate subjects in our world environment. Quite apart from ecological considerations and the unique character of its marine life, the scenic beauty of this area presents one of the greatest potential products in world tourism, and tourist pressure on this area will of necessity entail some form of control if the tourist is not to damage or destroy the product he comes to see. It may well be that this control can only be exercised through powers invested in a national park authority.

(d) Overexposure

Over-capacity for motor and power driven transport and the increasing strain being placed on the environmental capacity of the tourist product by the industry itself are two considerations the tourist industry, is, or should be, vitally concerned.

There should be a master plan for resort development which provides for the maximum number of visitors consistent with the protection and enhancement of natural, historical, aesthetic and environmental values.

The resort area should not be swamped by people, vehicles or noise. It is just as important to establish the physical capacity of a national park or scenic reserve as it is to determine how many tents and caravan spaces one can fit into a holiday camping ground.

The problem, of course, is made more acute by the fact that recreation is so often a peak-period phenomenon and that within limits so many people tend to be gregarious. For all our technological capacity, we cannot re-create another Grand Canyon or Great Barrier Reef. With each increase in our guest numbers, the availability of space to each person decreases.

Conservationists complain of the visual pollution of tourist infrastructure on the beauties of scenery and seacoast, and of islands and reefs. There is also constant complaint about the power and manipulation of the political and entrepreneurial forces which support tourism. It is true that much tourist development has been promoted by nothing more than financial speculation or by the impetus of the national policy of the moment and this may well conflict with the long term interest of the site where development occurs. Even the social segregation of tourism has come under criticism as a divisive influence.

HOW THE IMPACT OF TOURISM CAN BE MITIGATED AND CONTROLLED TO SECURE THE BEST INTERESTS OF THE TOURIST HIMSELF

Remedy is impossible without control which must be exercised in a democratic society by the people themselves, if not voluntarily, then most certainly through their democratically elected government. It matters little whether we use the euphemism "management techniques" which is current today for the word "control"; the result must be the same.

Capacity must be the key to thinking about access to all leisure facilities. We must find ways to judge how many cars, boats, recreational pursuits each island resort or stretch of coast can take; and what can be done in landscaping road improvement and access to increase the capacity without damage to the essential character of the place. And having done this what then? Well we have to come back to the single word 'control'.

In a recent United States report it was stated:

"In this era of enormously increasing vacation traffic, it must be assumed that those who visit our National Parks do so for the purpose of enjoying a unique experience, and are therefore willing to accept necessary restrictions, including those regulating numbers of people and their means of travel. Such regulations may, in fact, deepen the awareness of visitors that they are truly in places of special importance. It has been proposed that a national system of classification and zoning of recreational areas should be established, based on the concept of environmental capacity. Provision could thus be made for every kind of outdoor recreation in an environment where it can be most enjoyed. From "high density and recreation areas" to "wilderness areas", the aim would be to control numbers of visitors primarily by the extent of the provision of facilities and amenities - including roads, food and accommodation."

The British Tourist Authority's Chief Executive, Mr M.J. Licorish, has maintained on a number of occasions and to many international bodies that, if possible, education, publicity and information are far more preferable to government dictates; and I would agree with him where this is possible. "It is better to recommend" he says "to encourage, to say 'Do this' rather than 'Don't do that'. The positive element must be stronger than the negative. Recommend we must, and influence we must. Public relations and sales promotion, in the service of influencing tourist demand, must be used in all its guises; for promotion paid or unpaid, can influence the tourist consumer just as much as the consumer of any other product or brand. The national and regional tourist offices, the travel press, and above all the travel industry, can exert tremendous influence in guiding and controlling the public's tastes and requirements in travel to accord with the preservation of the tourism product. But if these methods fail I believe that we must be prepared to accept control by both central and local government and by coercion through entry fees and prior booking."

It is essential for the future success of tourism to the Great Barrier Reef and its supporting complex of continental islands and mainland access points that this whole area should be under the co-ordinated control of a single body which would have the interest of all sections of the community at heart and the power both to designate areas of special significance and delicacy and the powers of control. Nothing less than this can effectively preserve the tourist product in perpetuity.

However in addition to control, I believe that education is one of the most vital ingredients in the preservation of the tourist product through conservation. Its action can be two fold. First through the establishment of efficient and modern interpretive techniques throughout our national parks and recreational centres and secondly the provision of "activity" and "adventure" holidays for young people in these same national parks and recreational centres where they can learn sporting, athletic and recreational skills and at the same time learn to appreciate the value of a sound environment. But don't bank too much on it because one of the most prominent names carved into the ruined Temple of Poseidon on Cape Sounion in Greece (among many hundreds that desecrate this temple) is that of Lord Byron. If Lord Byron knew no better, what hope is there for the cream tea and candy floss brigade or we might say the stubbie brigade here.

Let me now end this paper on a strong and positive note and set out clearly the essential requirements for tourism in an acceptable environment.

Tourism is an expanding industry and a major force in the life of most nations. It makes a massive contribution to the recreation of mankind, to his health and his education and is a unique factor in the economic health of many countries. A national and international awareness is dawning that will establish the interdependence of tourism and conservation and ensure their future welfare.

The basic requirements for the happy union of conservation and tourism is:

- (i) To identify and protect our natural scenic, historic and architectural heritage.
- (ii) To plan tourist development with due regard to the character and capacity of the locality and the interest of its inhabitants. This requires a study of the coastal, urban and rural areas with a view to defining the types and volume of tourism which each can absorb, the ways in which tourism can be made compatible with local conditions and the measures necessary to prevent unsuitable, excessive or over-rapid development.

- (iii) To spread the benefits and pressures of tourism more widely in place and time.
- (iv) To achieve high standards of planning and design in all tourist development. This implies respect for the scenery, for coast and countryside, for the character of historic towns and sites, for national and local traditions of building and for the human scale in all development.
- (v) To ensure that all tourist development projects are judged both at their inception and throughout their implementation from the stand point of their effect on the environment.
- (vi) To secure an effective control of traffic in all places frequented by tourists.
- (vii) To secure the co-ordination of legislation and administrative procedures relating to conservation and tourism, which may well be through the establishment of protected areas and national parks.
- (viii) To encourage the widest possible education for all visitors and potential visitors through formal and informal education, the improvement of information services, the training of guides and the implementation of a code for tourists, this being linked wherever appropriate with the establishment of essential interpretive services.
- (ix) To establish a resource centre where the impact of tourism on the environment may be studied and where the exchange of practical information and expertise between bodies concerned with tourism and conservation can be carried out. This may well happen with the interests which we have represented at this workshop and with particular reference to the Great Barrier Reef Marine Park Authority.

POLICY ROLES FOR TOURISM
(Chairman - Dr Des Connell)

The Role of the Great Barrier Reef Marine Park
Authority in Relation to Tourism on the
Great Barrier Reef

by

DR JOE BAKER - (Member, Great
Barrier Reef Marine Park Authority)

The Great Barrier Reef Marine Park Authority is an Authority established under the Great Barrier Reef Marine Park Act 1975, which as evidenced by the wording of the Act, was envisaged as working closely with existing local, State and Commonwealth agencies. Certainly it cannot work alone. Its role may well be seen as an integrating one, drawing on the strengths of existing agencies, and local interest groups and minimising unnecessary duplication in education, research, planning and management of this unique natural resource.

One of the Authority's principal functions is the planning for conservational management in the Great Barrier Reef Region while making provision for the appreciation and enjoyment of the Great Barrier Reef by the public.

If our message can be spread and the educational program be made effective, the Reef can be appreciated, enjoyed and valued for what it is, with minimum human modification, by the widest possible cross section of the public from Queensland, from the rest of Australia and from overseas.

An educated, value conscious user may well be our best long-term insurance for the protection of the Great Barrier Reef.

In our interactions with other bodies, and in knowledge of the concept of a marine park, one must stress that there is, at present, considerable confusion. Under the Queensland Fisheries Act the term marine park is more closely allied to the concept of a terrestrial national park in the Australian situation.

In the Great Barrier Reef Marine Park Act a marine park is a term for an area under management control, where zoning takes place to allow different types of usage. The only activities specifically forbidden in a marine park established by the Authority are oil drilling and mining.

Hopefully in the future, differences in meaning can be resolved.

PLANNING FOR TOURISM IN THE REEF REGION

Workshop participants know of the various reports which have been prepared on the problems and the potential of Great Barrier Reef tourism particularly since the Pannell, Kerr, Forster (PKF) Visitor Plan of 1971. You will have also, within and outside this meeting considered the potential for increased Great Barrier Reef regional tourism which should flow subsequent to the introduction of cheaper international and internal airfares.

However, cheaper international airfares are currently directly beneficial only to those areas close to major international airports, and the Reef is remote from such facilities. It is my personal view that Reef tourism can only develop its full potential when a major mainland city in Queensland within the length of coast fringed by the Reef, is established as a major international airport. Otherwise the competition from the remainder of Australia is too enormous and the cost differential and airfares too great to ever get the number of tourists we want.

The tragedy of Reef tourism is that scant notice has been taken of past analyses of tourism potential on the Reef. The PKF report and others have never been pursued to and through the necessary decision-making bodies.

Unless we are careful, all that may come out of this workshop is yet another report without direction, impetus or enthusiasm to propel it to government.

We are at this workshop because the Great Barrier Reef Marine Park Authority and the Queensland Department of Tourism, recognising their extensive common interests, decided to hold a joint workshop to explore the possibility of taking action to facilitate extended tourism in the Reef Region.

"Taking Action" are the operative words! The workshop will have failed unless some firm resolutions emerge, which are practicable in a reasonable time-frame. Some may be very fundamental, involving your own recognition of a common need, and therefore encouraging great co-operation and mutual trust. Others will require subsequent, consistent pressure on local, State and/or Commonwealth politicians. It is worth stressing again that, the resolutions you pass must be practical and achievable. The resolutions themselves will be useless unless you guarantee to practise and pursue them actively with every thing you do.

THE ROLE OF THE GREAT BARRIER REEF
MARINE PARK AUTHORITY

The best interests of the Authority and the tourist industry lie in resource management to protect the Reef and thus conserve the long-term benefits which the Reef can confer upon Australia through the local, national and international tourist markets. Reef management and tourism are inextricably entwined.

PLANNING AND MANAGEMENT

The Authority sees its major function as one of people orientated management of the Great Barrier Reef, this means:-

(1) Maximising reasonable access to the Reef:

I am particularly concerned with the facts that:

- (i) it is very difficult for tourists to see the Great Barrier Reef - as opposed to the continental islands which may or may not have fringing reefs.
- (ii) it is not uncommon for tourists buying Great Barrier Reef holidays, and interested in seeing the Great Barrier Reef, to go home without seeing at close quarters, even so much as a fringing reef much less the Great Barrier Reef itself.

(2) Minimising any harmful impact on the Reef:

When tourists can be guaranteed ready access to the Reef, the Authority must be in a position to recommend and implement procedures which will ensure enjoyment and utilisation, not only for the enjoyment of this generation, but also, for all future generations of tourists.

The Authority is actively involved in planning, developing and testing facilities to improve the level of environmental tourism in the Great Barrier Reef. By environmental tourism, we mean participation by a tourist in activities which are designed to enable him to learn about and appreciate the natural environment of the Great Barrier Reef.

We want to allow reasonable access to and use of the Reef through:

- (i) co-operation and joint initiatives with all appropriate government and private enterprise bodies;
- (ii) research, both at our own initiation and in collaboration with other groups; and
- (iii) education of the user, the owner and the Governments by processes largely involving interpretive programs, newsletters and educational literature.

Details of the projects being developed and planned by Authority staff will be covered in Session Four. For this discussion, I can indicate that they include:

- (i) reef walks with specific features discreetly marked and explained in special accompanying leaflets;
- (ii) buoyed and roped trails for snorkel swimmers to view reef crest and lagoon pools;
- (iii) buoyed dive sites with accompanying water-proof literature describing features of interest;
- (iv) prepared glass-bottomed boat trails with accompanying literature describing features of interest;
- (v) audio-visual programs explaining and illustrating some aspects of the Great Barrier Reef in general and containing specific material explaining features of the developed walks, trails and dive sites; and
- (vi) training of tourist resort interpretive staff.

To effectively undertake its task the Authority needs to understand to the best of its ability the natural processes at play in the marine ecosystem and the present and likely human-use impact of that system.

Research is therefore a key function of the Authority.

It is essential that we co-ordinate existing knowledge and extend knowledge ourselves, on the nature of this complex ecosystem referred to as "the Reef". How do we define it? What is the secret of its stability? How fragile is it? How resilient is it? How will changing human usage patterns affect it? What will be the most significant demographic factors which influence the Reef stability in the future?

The questions are endless. Research projects must be carefully planned, and will be necessarily inter-disciplinary and management orientated, flowing from the biological/geomorphological to the economic/social.

Management is only necessary because people are using the system. Many of your incomes are gained from Reef enterprises, and personal pleasures are had from Reef use. Our research is aimed at discovering what these values are, so that management plans can be formulated on the basis of best use from:

- (i) an environmental (conservation) perspective;
- (ii) an economic efficiency perspective; and
- (iii) a social and personal value perspective.

From bio-physical research the environmental impact of present and likely human uses will come to be known, and from economic and social research the value to people of these uses will be known.

Where management is needed to protect the natural environment of the Reef, the economic and social consequences will be investigated.

Where management is aimed at enhancing Reef-based industries, the environmental costs will be investigated.

There is much basic research needed on the nature of the Reef itself. We must be cautious, at least in the Authority's role, to not make statements unless we can justify them by factual experimental evidence.

In this way the Authority and those involved in tourism must work closely together, and each understand the other's needs and actions.

CO-OPERATIVE ENDEAVOURS

The Authority cannot offer a blank cheque but within its limited resources of professional staff and equipment the Authority seeks to collaborate with the tourist industry and other government bodies on a shared cost. We want to develop the facilities for environmental tourism.

THE FUTURE

As a member of the Authority, I see tourism as an inevitable and rapid growth industry, the growth consequent upon increased affluence, increased leisure time, and increased travel and resort facilities.

The first two are largely beyond your control. Increased travel and resort facilities demand your careful and immediate attention.

Travel to mainland ports in proximity to the Reef must be encouraged, made more attractive (both financially and by appropriate decor) and more publicised on a world-wide basis. Travel to the Reef and around the Reef must be carefully assessed. Speedy and comfortable transport to the Reef resort must be achieved. Once the tourist is at the resort, leisurely boat cruises of relatively short duration are pleasant - but a 5 to 6 hour bumpy, swaying trip up and down endless waves with only the horizon to look at, does not stimulate the tourist to come again or to tell others that they "simply must visit the Reef".

And that is what we need for the word to spread. Mainland to Reef resort travel could be your biggest single challenge.

At the resort itself the buildings must be given careful consideration as to appropriate design, the activities available must be carefully planned and appropriate - hopefully unique - to your particular part of the Reef.

On the Reef, knowledgeable guides will stimulate the interests of your guests.

In the future the Authority sees environmental tourism as an important and increasing element in the future use of the Great Barrier Reef.

The Authority considers that it has a responsibility to pioneer and continue development of interpretive techniques appropriate to the Great Barrier Reef.

The Authority expects that the provision of these facilities will become an important and profitable part of many Great Barrier Reef tourist enterprises.

The Authority intends that in the shortest time possible the stage will be reached where no visitor who comes for a Great Barrier Reef holiday will need to return home without having had the opportunity to experience and learn about the Great Barrier Reef, hopefully after access to the medium of high quality up to date audio visual programs, which prepare the visitor for responsible enjoyment of this remarkable resource.

For your part in our future, we need support in ensuring that Governments are made aware of the essential need to provide the Authority with the manpower and facilities to fulfil its role in research, education, planning and management of this Great Barrier Reef Region so that the Authority may pursue its objectives which will benefit you.

Once the legislative problems have been resolved, we look forward to close collaboration with you, with local, State, and Commonwealth bodies in developing a better understanding and even greater enjoyment of the wonders of the Great Barrier Reef.

The Queensland Fisheries Service and Tourism
in the Great Barrier Reef Province

by

NOEL HAYSOM
(Director, Queensland Fisheries Service)

1. SUMMARY

The role of the Queensland Fisheries Service is to provide for the wise management of the living aquatic resources of the State for the enjoyment and benefit of its citizens (both present and future), and within this framework to promote the good order, development and welfare of the fishing industry.

The paper briefly relates the Service's objectives and responsibilities to tourism generally throughout the State. Such a relation is largely an indirect one, operating through the implementation of the conventional fisheries regulations governing both recreational and commercial fishing activities, as well as the protection of marine fauna and flora.

However, the Queensland Fisheries Service is also developing a more direct interaction with the tourist industry through its responsibilities under the marine park legislation.

The paper highlights the differences between the concept of a marine park under the Queensland Fisheries Act and that under the Commonwealth Great Barrier Reef Marine Park Act, and outlines the main features of the Queensland legislation.

The Service's developing policies (and the term "developing" is stressed in view of the comparative novelty of the marine park concept) are presented in relation to such matters as visitor centres, interpretive facilities, creation of opportunities for observation of marine wildlife and the management of recreational and other activities in marine parks. It is stressed that any initiatives taken by the Service in such matters are aimed at complementing or supplementing actions by tourist resort managements and avoiding any competition therewith.

Finally, a brief resume of action taken to date by the Queensland Fisheries Service to implement these policies is given.

2. THE QUEENSLAND FISHERIES SERVICE AND TOURISM
IN THE GREAT BARRIER REEF PROVINCE

The role of the Queensland Fisheries Service is to provide for the wise management of the living aquatic resources of the State for the enjoyment and benefit of its citizens both present and future and within this framework to promote the good order, development and welfare of the fishing industry. Many people tend to think that the fishing industry is a matter of big trawlers, purse seiners and factory ships, but single people along beaches or on small boats fishing for fun are part of that industry.

The actual value of recreational fishing is always difficult to assess, due to the far reaching ramifications of recreational spending and the lack of comparably simple indices such as gross sales of fish, which make economic surveys of commercial fisheries a much simpler task. Nevertheless those few economic studies that have been carried out in America and in this country reinforce the belief that recreational fishing may be worth several times that of the commercial industry. There are something like 75,000 privately owned pleasure boats in this State and the graph of growth is rapidly approaching the vertical. The game fishing fleet, we heard from Jock Izatt yesterday, is worth \$3.8 million. At the moment, I might add there is an economic survey of the game fishing industry being carried out by the Fisheries Division of the Commonwealth Department of Primary Industry.

The value of recreational fishing in the economy has been used by many holiday maker oriented groups to urge the fostering of angling at the expense of commercial fishing, but I would remind such bodies that a significant element in the tourist attractions of this State is the number and variety of superb seafoods which we have to offer and it is the oft-despised commercial fisherman that puts those seafoods on the tables of restaurants and hotel dinner tables.

My Service has the responsibility of ensuring a well balanced but not necessarily equal sharing of the fisheries resources amongst all legitimate users. While we draw the line at dynamiters and Taiwanese clam boats, we must recognise the rights of a wide variety of competing users, be they trawlermen, anglers, scientists, spearfishermen, red blooded marlin hunters or just plain viewers. Besides the discharge of its conservation and fishery management responsibilities, per medium of conventional fisheries regulations, my Service also has responsibilities for the State's existing marine parks.

There seems to be a widespread belief that the Great Barrier Reef is completely unprotected unless brought under Commonwealth marine park legislation. Coral in the sense of its collection has been legislatively protected through Queensland territorial waters for a quarter of a century. In the fisheries legislation is a variety of management and protective tools for the Reef. Sanctuaries, habitat reserves, closed waters, closed seasons, protected animals, all these concepts used on their own or in combination, give a wide spectrum of management tools or options. The State Marine Park legislation provides additional advantages over the Commonwealth Great Barrier Reef Marine Park Act. I think the main one is that it is much more difficult for politicians to change the rules except by reference to Parliament. A marine park declaration is not the only sort of protective device available. There are many classifications in our Act. To describe them briefly, they are:

- . a recreation area in which the Queensland Fisheries Service would maintain the area as much as possible in the natural state conducive to the enjoyment by members of the public for boating, recreation, angling, swimming, and underwater exploration. In other words, the types of activities experienced at Heron and Green Islands today;
- . a natural environment area in which the marine community is maintained to the greatest possible extent in its natural state commensurate with a moderate degree of use by the members of the public;
- . a wilderness area, maintained as its name implies, in a wild state. Visitor entry opportunities are not provided, and in fact are actively discouraged. The wilderness area community might serve as a baseline or bench mark to allow detection of any signs of deterioration in the more heavily used parks;
- . a special provision is made for research activities in scientific areas. These are areas where priority is given to scientific studies and where researchers can experiment with moderate scale manipulations of the environment which would not be appropriate in other areas. This doesn't mean of course that scientific research wouldn't be allowed in other zones. In wilderness zones, for example, we might allow some research but perhaps restrict it to scientists with an established reputation engaged in non-manipulative research; and

finally, the legislation includes special feature zones and a historic area zone.

Our marine regulations are enforced by a team of specially recruited marine park rangers who can be assisted if necessary by the Queensland Fisheries and Boating Patrol. The marine park rangers are now operating on Green Island, on almost a daily basis, and at Heron Island regrettably, on a much reduced scale of visitation. I had hoped that I would appear before you today in the marine park ranger uniform but unfortunately I couldn't find a pair of trousers amongst the rangers that would fit me. Their uniform is white shirts with identification badges and symbols on the shirts and dark blue shorts or long trousers if it happens to be a cool day, topped off with a Joe hat. If you see these people on Green or Heron Islands you'll know who they are.

In terms of visitor use policy, the Queensland Fisheries Service believes that the quality of marine park use depends on an informed understanding by the visitor of the park and its resources. An imaginative and meaningful information and interpretive program which provides this understanding is essential. It is our intention to provide these centres in various areas in the future or where these services may already be provided by private entrepreneurs. The marine park staff would provide technical assistance and information as well as encouraging park visitors to make the best use of these privately established facilities. I might add that the Queensland Fisheries Service has already acquired the Monkman lease on Green Island for development as a marine park ranger station, an interpretive centre, and a reef biological field research base to supplement the Fisheries Laboratory now being built at Cairns.

The first marine park ranger station in Australia as far as I am aware, is nearing completion at Green Island and will provide information to what we estimate as 50,000 enquiries a year. Guided reef walks are already in operation and proving a big success with tourists and resort management alike. Research into the effects of visitors on the coral community at Green Island was initiated last year and promises to shed much light on the important business of protecting this and other reefs subject to heavy visitor pressure. A series of trial pamphlets and information sheets have been printed and distributed and final printings are budgeted for in the next financial year. More than 2,200 marine park visitors have been interviewed and their needs and complaints fed into appropriate management agencies for action.

A broad program of environmental education is part of a ranger's duties. Co-operation with schools, colleges, publishers and other organisations is encouraged. The Service is communicating to visitors an environmental consciousness both within and beyond the marine park system. The Service has embarked on a modest program of providing greater opportunities for visitors to view and understand park wildlife. The current activities will be extended to the construction of a variety of interpretive trails including board walks through mangrove areas. Some of the marine parks we have in mind are on the mainland area in muddy mangrove swamps.

Thus you can see that our parks do not merely cater for the blue water man. As the park system expands, the Service would hope that these initiatives will be linked with similar concepts which the Great Barrier Reef Marine Park Authority might develop in the areas under its responsibility. It must be stressed that the initiatives taken or about to be taken by the Service in matters of interpretation, information and visitor assistance are aimed at complementing or supplementing actions by resort managers. The Queensland Fisheries Service is anxious to avoid any direct competition with tourist industry entrepreneurs.

Our role is entirely one of resource management and service to the public. Where a private attraction already exists, assistance will be lent to increase the quality of the visitors experience. Where an attraction is needed this Service will encourage the development of a tasteful facility.

Finally, I would like to provide a brief status report of our marine park activities on the Great Barrier Reef. There are two marine parks in the Queensland State system. Many more proposals for the addition of significant and important areas to this system have been developed over the last few years but have been delayed by the difficulties in resolving overlapping State and Federal jurisdiction. I can assure the industry that as soon as this conflict is settled, this backlog will be cleared and a well selected system of marine parks within the State concept will be declared and managed to supplement, and I would hope be co-ordinated with the Great Barrier Reef Marine Park Authority's system.

A number of research projects are under way which will add valuable information to the recorded natural history of our coral reefs. These include studies on the life histories of the giant clam, the population status of the main species of beche-de-mer, the impact of coral collection for the trinket trade, and the continued monitoring of crown of thorns starfish infestations and coral regeneration in the wake of such

infestations. We believe we have recently made a breakthrough in the assessment of reef fish stocks. Research has been under way for three years on the effects of fishing on reef fishes. The results tend to confirm that exploitation is at a disturbingly high level on many areas of the Barrier Reef.

Aerial photography is being used to map the marine life on existing and proposed marine parks in order to monitor changes which may be caused by visitor impact and just over 200 reefs have been surveyed to assess their potential for inclusion in the Queensland park or reserve system.

The Queensland Fisheries Service is represented on the Department of Education's Environmental Committee and is involved in producing films and slides of reef life for educational purposes. The Service is seeking the acquisition of office space in Cairns for visitor and tourist information about the Reef and the new \$1.2 million Fisheries Laboratory complex mentioned previously will provide laboratory space for research which hopefully will lead to better management of our marine resources.

National Parks and Tourism in the
Great Barrier Reef Province

by

PETER OGILVIE

(Queensland National Parks and Wildlife Service)

1. SUMMARY

The Queensland National Parks and Wildlife Service is responsible for a significant national park estate in the Great Barrier Reef province. It also has a broader mandate in the area, that of nature conservation within the framework of the several Acts it administers.

A sizeable percentage of Barrier Reef tourist resorts are located on islands which are wholly or partially declared national parks. How each park and its associated tourist facility interact is a matter of considerable importance to both parties and to the visiting public. The relationship should be harmonious or, to borrow biological terms, it should be a symbiotic relationship rather than a parasitic one.

The natural resources of any island are limited and isolated to varying degrees. They are invariably more susceptible to human interference and less capable of absorbing the many by-products of our society. There are many limiting factors which must be recognised as such in any planned development. This raises the concept of carrying capacity. How many visitors can an island absorb without the resources being significantly degraded and the quality of the visitor's experience being impaired? The answers aren't readily available, but this in no way negates the question.

When a national park island becomes a tourist destination, a need for active resource management is generated. Ideally this sort of management should relate to the island as a whole and to groups of islands as a region. It is probably stating the obvious to say that resource management and resort management on islands have their own special problems.

Many of these problems derive from a lack of, or a breakdown in, communication. The National Parks and Wildlife Service and the tourist industry must encourage more dialogue and establish more common objectives. One party is dedicated to the conservation of our natural resources whilst the other relies on these resources for its livelihood.

2. NATIONAL PARKS AND THE QUEENSLAND
NATIONAL PARKS & WILDLIFE SERVICE

National parks are established primarily for nature conservation; and secondly for human enjoyment. In the management of parks, we emphasise conservation because we're looking at maintaining an area in perpetuity. Management must be directed towards maintaining resources. Often this is wrongly interpreted as being directed against the public's enjoyment.

Eighty per cent of the tourist resorts that occur within the Great Barrier Reef province are situated on island national parks. This means the Queensland National Parks and Wildlife Service has a very big involvement in the tourist industry. As a national parks and wildlife service, we are hosts in the same way as the tourist resorts are hosts to people. Often the national parks are seen as simply an appendage to a tourist resort. Yet we are inviting people there whether they be guests at a tourist resort or a day tripper there for an outing. We are their host and we have to provide for them with, for example, facilities in such a way that are not detrimental to the resource itself. Picnic areas, camping grounds, toilets, and barbeque facilities on a number of island parks, particularly in the Whitsunday group have been constructed by the Service.

Camping is not allowed on most resort island parks at the request of the resort operators themselves and we're happy to go along with that. There are a couple of exceptions, Dunk Island and Lizard Island. Camping on Lizard Island is limited to 12 people at any one time. One of our management procedures is that we ask people to get a permit to camp. We facilitated this recently by producing a bush camping permit or a camping guide which people can simply obtain, complete and send back to us.

The easiest job is often providing facilities; the hard job is maintaining and managing them. Management is a factor on which the Service spends most of its time and money. Let's face it, if people weren't there, management wouldn't be required. The natural resources take care of themselves if people aren't in there doing something to them. Management revolves round the basic aims of minimising the effects of man and minimising the modification of the park to cater for man. Management often involves manipulation. It may involve doing absolutely nothing and in fact that's a valid management decision, to do nothing. Management also involves long term

planning, and we are particularly concerned with the carrying capacity of these island national parks. Carrying capacity relates to the establishment of limits in changes that may occur in the ecological and social quality of a recreational experience. There are two aspects:

- (i) the resource carrying capacity. How much can that resource withstand before it is detrimentally affected; and
- (ii) the psychological carrying capacity or the visitor attitude carrying capacity, how many other people can those visitors absorb without their own recreational experience being impaired.

This is an important aspect and a lot of research has been done. Some people do not want to see more than 20 people in a day wherever they go. Other people are happy with a very gregarious situation. It's a matter of working out how a particular area should be managed in keeping with this carrying capacity.

Islands have slightly different carrying capacities from the mainland. Coral cays are very small and have no "land-bridge" contact with the mainland. Continental islands have at one time had connection with the mainland and as a result of rises in sea level they have been separated from it. Their resources are extremely limited: in the amount of land; in the amount of wild life; in the amount of fresh water (important in establishing resorts); and in the conservation of indigenous culture.

Islands have a very limited capacity to absorb any sort of waste material. Install a septic system on a coral cay and very quickly any fresh water that may have been underground will become foul. Disturbance and manipulation of any kind is quickly reflected in the system. Build a harbour and that's reflected in movement of sand around the island, trees start disappearing, erosion occurs. External factors can have a very important bearing, an oil spill 100 miles away may suddenly land on your shore. You're surrounded by a medium which carries materials like oil, waste chemicals and other materials, a lot more readily than occurs in a mainland situation.

Modern technology has managed to fill a lot of gaps such as access and communication, but it's also tended to hide a lot of things. I think people's attitude to water is an important thing. We're used to turning on a tap. Water comes from heaven only knows where. A survey in England recently

showed that children thought milk came from bottles, not from cows. People see water as coming from taps, an endless supply of it. You turn that tap on, and water will come out. Quite often resorts tend to hide the fact that water is limited on their islands. They should be saying, "fresh water is a limited commodity, let's learn how to use it that way".

I would now like to go through a couple of problem situations that are worth discussion in an island context using two terms from biology, parasitism and mutualism. Parasites are organisms that live off others, they affect them, they damage them. Mutualism is a situation where two animals or plants live in harmony and each helps the other. It's a very good sort of association.

I see tourist resorts in many cases in this context. Many of them in my opinion are parasitic. They live off the resource that's there. They're next to a national park, but they see that national park as something to live off. It helps get the people there; it's something that's nice to have next to you, but it's also a source of topsoil or an area to dump rubbish or collect firewood.

Mutualism is what we should be striving towards, an harmonious existence where the Parks Service and the tourist industry are working out and communicating on what is best for that whole area (or region) and putting their effort into doing just that and not one trying to live off the other and injuring it as it goes along. There are some examples of very good mutualism relationships.

An example away from the Reef is Binnaburra and O'Reilly's at Lamington National Park, where we see a very good mutualistic relationship. Those resorts have given something back to the national park. They get something from it, but they act in harmony with it.

Ideally when a resort establishes on a national park island, we would prefer that the resort remains part of the national park. In fact it's established on a special lease so that the Parks Service is able to manage the island as a whole and not have separate entities. We are looking at maintaining a natural system and the best way to do that is to be able to control that whole ecosystem. Introduced animals and plants can do a lot of damage to the natural resources, for example, goats on islands. If they've been there for a long time, the damage is often hidden but it is in fact there if people trace back to what the resource looked like before they were actually on the island. I have photographs from some islands that display this very graphically. Fairfax Island in the Bunker group is one of them.

A national park shouldn't be seen as an appendage to a resort, something to expand, to utilise, to grab bits from. There is a limit to that expansion. If expansion or pressure for that expansion goes beyond a certain point, then the Parks Service must decide whether it's worthwhile retaining that area as a national park at all or simply saying, "Right, take it, and we will leave it". That decision depends on our objectives for that region, but there must be a limit beyond which expansion and development of tourist facilities has to stop. Unfortunately the words "National Park" do not come up very much in the publicity that the tourist industry puts out in relation to the islands even though eighty percent of the island resorts are on national park islands. To use an example, a Queensland Government Tourist Bureau publication lists a whole series of islands to visit, the only ones on the Reef that aren't national parks are Daydream and Hayman, but there's no mention of the word "National Park". Now that's surprising because to the overseas visitor, particularly the American, the term national park means something. They will come to an area that's a national park because there are certain values that they can be sure of getting.

3. RESORTS AND THE QUEENSLAND NATIONAL PARKS & WILDLIFE SERVICE

The relationship between resort guests and day visitors is one we have to address ourselves to. That was referred to in Stephen Le Page's excellent talk yesterday. (I think one of the most thought provoking talks that this workshop has received.) The love-hate relationship between tourist resorts and the research person, or the academic I suppose was the word that was used here today, is an interesting one. It's an unfortunate one in many cases. The researcher can produce a lot of very valuable information for the tourist resort to use in interpretive work in getting information across to the guests. There are many other problems: the management of garbage disposal; sewage; access facilities, and so on. I find there are problems in communication within the tourist resort itself. The smaller the situation, the smaller the island, the less communication that seems to occur between individuals. It may be because the division of labour and in many cases on island resorts, the division is such that the people are involved in specific tasks for which they have the expertise. For example, anyone can drive a bus or a car at a mainland resort but not anyone can drive a 50 or 60 foot boat, so that person is a specialist.

Communication should exist between the resort and the Parks and Wildlife Service and both areas are often to blame when that breaks down. Another area of communication between the Parks Service and the visitor, and the tourist facility and the visitor, is interpretation. This is transferring information to your visitor in such a way that's enjoyable, thought provoking, instructive, inspiring and gets people involved in the natural resources and in nature. Believe me, the spin-off from that can be immense, in terms of conservation, and visitor enjoyment. I believe it can be a draw card for resorts.

Resorts should exploit the public's desire for environmental information to get across their story on the natural world and their resort's history. For example, I see very little in any of the current tourist material on the history of the Whitsunday group, starting with Aboriginal history; the European aspects, Cook, Flinders, King, and the "Beagle", the early voyages; how these areas got their names, and the early inhabitants and what went on. I'm suggesting that each tourist resort should employ an interpretive officer. The Parks and Wildlife Service is happy to assist in designing an interpretive program for tourist islands and I know that the Queensland Fisheries Service and the Great Barrier Reef Marine Park Authority are also happy to assist. There may be other ways of facilitating this. John Luscombe has told you about the establishment of the Great Barrier Reef Parks Association and that is one way of involving people. There are lots of universities now that are training people as environmental officers. That training could be used. People from Gerry Sutton's area could be brought in, initially on a voluntary basis, while they're still students, to assist running interpretive programs through the Association or through a resort proper. Those people then can be assessed by the resort for future employment.

We must know the basic information before we can interpret properly. We must know the natural environment. We must understand it before we can tell others about it.

I'll end on the point that a lot of it boils down to different levels of communication: communication between the tourist industry, the Parks and Wildlife Service, other government organisations, and the visitor.

Communication shouldn't be ambiguous. I might give you one example where communication was ambiguous. I think it occurred with Trimit's Treacle Pudding if I remember correctly which caused several people to be sent to hospital with very badly scalded feet. Apparently they misunderstood the label that said "Before opening tin, stand in boiling water for twenty minutes".

Panel Discussion - Policy Roles for Tourism
(Chairman - Dr Des Connell)

ROY CLARINGBOULD, Australian National Travel Association: Dr Baker, What is the Consultative Committee for the Great Barrier Reef Marine Park Authority?

DR JOE BAKER: The Authority is a three man Authority and cannot hope to represent the views of every user of the Reef. In the drafting of the Great Barrier Reef Marine Park Act it was envisaged that there should be a Consultative Committee in which up to 9 members could be nominated by the State of Queensland and a similar number by the Commonwealth. Nominations would include representatives of major government departments who are users of the Reef as well as individual Reef users. The Consultative Committee has the responsibility to advise the Minister directly on matters of importance on the Reef or to answer questions that may be referred to it by the Authority or to request the Authority to investigate certain things.

ERROL STOCK, Griffith University: Noel Haysom, Dr Joe Baker earlier on cautioned us against having poor information when making statements. Would you care to make a comment on the Fisheries Services professional opinion on the effect of oil on the reef ecosystem.

NOEL HAYSOM: That's the seventy-four dollar question, isn't it? I don't think we have any firmly developed opinion. Probably you'd get a number of different opinions from as many people as we've got in the Service. My own personal view is, that a single contact with an oil slick would probably cause little harm. I've got no idea what the long-term results might be or the effects of chronic pollution which might occur if there was a leak on an oil system. I would be much more worried about the effects of an oil slick coming in on the mud flats and mangrove areas of the mainland coast.

ERROL STOCK: I'd like to ask further details. You said you had some experience with respect to an oil spill. Could you give us a few brief details about that particular one and where it was?

NOEL HAYSOM: Some observations were made in Moreton Bay and others in the Bunker group. You'll find it all in the transcript of the Royal Commission on Oil Drilling. Also I'm not the origin of the reference to oil being good for corals. If we had an oil slick coming in on Gold Coast beaches, the Committee considered it would be much better to let it come ashore and then scrape it up rather than treat it with

detergents. If oil is treated with any sort of dispersant it is likely to spread right through the column of sand and it would take years to get rid of. It's much easier to let it come ashore and then scrape it up with bulldozers.

JOHN BEARMAN, Department of Mapping and Surveying: Dr Baker, Dr Endean of the Queensland University has stated publicly that he thinks the Great Barrier Reef Marine Park Authority should go away and never be heard of again. Do you think he's right? If you think he's wrong, why are you right?

DR JOE BAKER: I respect Bob Endean as being what one might call the father of the modern naturalists of the Great Barrier Reef. I think Bob has spoken more about the Barrier Reef than any other person and we do owe him a great deal of credit in drawing attention to the need for more work to be done in Barrier Reef research. I think that Bob is very outspoken. His statement as I understand it, was that because there are no biologists on the Great Barrier Reef Marine Park Authority it should go away and disappear. The three man Authority can never be totally multi-disciplined. I believe that the Authority as established, given the current State/Commonwealth relationships, cannot be effective, but once those difficulties are resolved then in fact the Authority can be a most effective management body. It would be a body that co-ordinates appropriate research, introduces education programs to complement those of other bodies and avoids wastage of resources. If you listened to what Noel Haysom said, if you knew the Queensland National Parks and Wildlife Service, if you knew what we are initiating as an Authority, you'd see that there is overlap which we should be able to avoid. I don't think the Authority should go away, I think it must be patient. I must admit as Nev Warburton observed last night, "I'm a much more frustrated person than I was this time last year", but I hope that within six months time that will disappear, and that the Authority will reappear as a significant body.

PETER WAKELING, Department of Tourism: I rise to a point of protest, at the part of the question before last. It would appear that quite considerable efforts have been made in the last two days to drag out what is only one issue, the drilling or the spillage of oil in offshore Queensland waters, a fairly emotional sort of an issue. A concerted attempt has been made to cloud the real issues that are involved in this workshop on this one emotive proposal. It is perhaps coincidental that a public meeting was held in this city last night coinciding with this workshop and I see that this issue is continually going to raise its head. Could I please ask the panel members and the delegates who might join with me to let's get down to the job

of looking at the broad issues involved instead of trying to cloud the issues and attract the attention of the national press which is something that's not going to do any of us any good at all and certainly we can't resolve.

PEG HAYLES, Hayles Magnetic Pty Ltd: May I say that I think this morning's speakers have given some tremendous comment. It gives us some direction. We know that we can look to you with confidence because we have a better understanding of what you're endeavouring to do and I think through communication and a feed-in and some really good interpretation between us, we can take this industry the way it ought to go, and I compliment you all.

STEPHEN LePAGE, Australian Tourist Commission: Mr Chairman, I'd like to address a question to Peter Ogilvie. I was very interested in your description of parasitism and mutualism in relation to the co-existence of parks and resorts, and your mention that maintenance of park environment and facilities is a major resource drain on the Queensland National Parks and Wildlife Service. Do you see the resorts as having a regularised role in the future in the maintenance of paths and toilets in the national parks adjoining them, and if this was possible, would a more flexible individual approach to island management as a whole, result?

PETER OGILVIE: I can only give you a personal answer as the Service hasn't addressed itself to this policy matter. Frankly, I think that situation could develop and I'd like to see it develop. As I mentioned previously, I think that resorts have a responsibility to the natural environment that they're living with. I think that Park Service would have to supervise and give expertise where required. We certainly have had assistance on a more voluntary capacity in doing things like this. We have had bush walking clubs that have come in and helped us clear a track system, when we didn't have enough staff to do it ourselves, but they've done it under the supervision of Service staff; and I think that approach is a good one. It's one I would like to see developed and I would think it makes management then a joint exercise and let's face it, the National Parks and Wildlife Service is an organisation that is there to promote nature conservation. It's a community thing.

EDDIE HEGERL, Australian Littoral Society: I would like to take exception to Peter Wakeling's statement on one basis, the oil drilling issue has a great effect on the tourist industry in one way at the present. The political realities are that it is obstructing the declaration of a marine park or parks in the Great Barrier Reef Region under the Federal Government's

legislation. We will not get a marine park declared, as long as there's the prospect of oil drilling. Now to me it seems that if the entire Barrier Reef Region is a managed area, a marine park under this legislation, you have potentially the world's greatest tourist attraction. People know about the Reef. If as other speakers have said, they know the Reef is going to be a park, a really special area, it's a tremendous promotional asset. So it seems to me the question of oil drilling is directly linked to tourism in this country.

ANGUS INNES, Member for Sherwood: This is a comment, inviting further comment evoked from John Luscombe's and Peter Ogilvie's contributions. The emphasis has been on the provision of interpretive facilities, and the provision of skilled interpretive officers. I spent a couple of hours with the Director of National Parks in Victoria about four weeks ago. He says that in their Service they've attempted to build on a localised basis with a manager-general within the Service and other officers below recruited from the local area. As he says, the people most valuable to have on side are the locals who can be the eyes and ears of the Service and look upon the resource as the source of their living. Wouldn't it be best for your Service to recruit and develop interpretive officers and train personnel from within the local area?

PETER OGILVIE: Everyone is an interpreter in some way or another. Everyone carries out interpretation when in contact with anyone else. You're interpreting. You're trying to put a message across. You're trying to convince us of some of your ideas, your approach. In that sense, local people are obviously the best. Nevertheless interpretation involves certain other skills. Either we can assist local people in training to use those skills or we can provide interpreters ourselves. Interpretation must get a truthful message across. Sometimes the message is not as truthful as it could be. That's not to say the person is purposely putting across a wrong interpretation, but unfortunately sometimes that person hasn't got the right information. Quite often one's interpretation is made up or is embellished a little bit by personal bias. Now sometimes that doesn't do too much harm, but in the long term I think it does.

JOHN LUSCOMBE: I would agree with employing local interpreters. I would ask you who's going to pay for them - the National Parks Service, or the resorts? I think a few of us make a mistake when we think about interpretation. I get the feeling the questioner is thinking about salesmen a little bit. Interpreters aren't salesmen. Mothers are not salesmen, yet when babies are born, they very quickly interpret their need for milk. That's interpretation. It doesn't take long to

work out. Salesmen are different. Yesterday we did a sales thing here. One, two, three, four, that's the sales pitch. If you did that to your guests, they'd be amused for a short period and then they'd leave, break all their holiday vouchers and go home. Interpretation isn't that. It's a feeling from inside, some of Peter's best interpreters are guys that have worked for the Parks Service for twenty or thirty years. Some of the ones that I know can sit you quietly on the ground and in their quiet slow way, just totally capture you with fantastic knowledge. Unfortunately, once you get to the Reef, there are not many of us who would have this knowledge. You can't employ them, as they're already the bosses in the National Parks Service and the Marine Park Authority.

DAVID COLEMAN, Tropical Queensland Tourist Association: How are interpreters to be paid? Are the resources available from the government to pay for interpretive services?

PETER OGILVIE: The Parks and Wildlife Service does not have enough interpreters and unfortunately there is no money to pay them. There is a total freeze on staff in the Public Service at the present moment.

GORDON MCKAUGE, Laroc Pty Ltd: On this business of payment to manage national parks correctly and provide interpreters, is there any value in letting the user pay? In Western Australia it works very well. They're justifiably very proud of their national parks. The people are used to it. They see no objection to paying for the privilege of their children not having their feet cut, of having firewood beside the fire places. You've got to give them full marks. It's an excellent system. Is there any value in seeing this done on the Barrier Reef, to let the user pay for the management and control of our national parks? Not for entrance into the parks, but for the facilities that the government is going to provide over and above what's a fair thing for the average taxpayer.

PETER OGILVIE: I accept that in certain aspects, the user should pay. There are certain interpretive services for which we would like to charge. Unfortunately our Treasury won't let us do this at the moment. We don't have the facility in many cases for collecting the money and quite often it costs more to collect than the product itself costs to sell. The Parks Service has just produced a nature song record which will be sold for a price, but the money goes straight back into consolidated revenue. It doesn't come back to the Service. On the broader issue of charging for national parks we could talk quite a while. I personally am averse to doing such a thing. It's against my principles, and principles on which I see a national park established. I can see a basis for charging for

certain things that may be offered to a visitor but national parks are there for everyone. There should be no selective basis. And quite frankly on a management level, to charge fees would be virtually impossible. For example, there are about 173 island national parks off the coast of Queensland.

JOHN LUSCOMBE: If you put two interpreters on an average island at the moment it would represent about 75 cents a head a day for the average number of guests that go to your islands. The cost at resorts on the mainland would be about the same. That's all you're talking about. Now if it won't increase the guests to that extent, I'll be staggered. It's one of the reasons we're not getting the guests from the south. Why aren't we getting them? Why aren't we getting the overseas people? Because we're not providing these services. What would you think if one entrepreneur was to lift, for example, one quarter of one percent of just the west coast U.S. people alone to your resort. That would represent eighteen thousand guest days. Stop and think about it. Eighteen thousand. That'd pay for half the National Parks Service interpretive officers. So, for goodness sake, don't say whose going to pay for it. We, the industry should. It's going to do us good. It's going to increase our income. You said you came here to find out how to do better. You've got to spend if you want to do better. It's no good sitting back and saying "somebody else, give me the money". Get up and do it yourselves.

PETER OGILVIE: Just one point, in Kosciusko National Park, I gather that the tourist resort there levies 20 cents per bed. I'm not sure whether it's per night or per stay, on each guest, but that money goes to the Park Service to provide interpretive materials. Those resorts have seen the value of it. They're prepared to levy that small amount on their guests. The guests are happy to pay it and the Park Service can produce interpretive material. I think it's an ideal situation.

DR JOE BAKER: I'm not sure if I'm out of turn here, but I understand the Brisbane College of Advanced Education which trains students for interpretive positions could be approached. Is it possible for your tourist resort operators to negotiate with that institution in Brisbane to include in that course a period of say six weeks, whereby each student spends that time in a resort. I should imagine that all that student would require is that the industry offer board and keep. I assure you the students would be happy to have the practical experience to develop their own competence. You'd be able to see as tourist operators, whether such a scheme was giving you a positive return and by the time these people graduate you may have a supply of interpreters for now and for the future.

GERRY SUTTON, North Brisbane College of Advanced Education: Joe, we've tried that. We tried that for a year and a half, and we've only had John Luscombe and Alan Stringfellow co-operate with us. We've been trying for a year and a half to break that ice.

BRAM NICHOLSON, Whitsunday Wonderworld Travel Council: Perhaps this is addressed to you Peter, and it is in relation again to charges at national parks. We do have problems in certain areas where national parks provide free camping and caravan areas for which the taxpayer is paying. These sites do not meet local government by-laws and being free, this creates a fair amount of resistance by local operators.

PETER OGILVIE: I don't know the circumstances to which you're referring. It may be Conway National Park. The Service's policy is not to compete with private enterprise at all. We don't supply caravan parks but if somebody turns up in a van and our camping area can take a van, then the van can be taken into it. I don't know whether Trevor Volbon wants to make any further comment on that.

TREVOR VOLBON, Queensland National Parks and Wildlife Service: We maintain we are not competing with the local caravan parks and in some instances we are catering for a different segment altogether. We do not have hot water, only cold water showers. You find that people tend to stay for a lot shorter time. They'll end up backing out of the caravan park if they're not satisfied.

BRAM NICHOLSON: Caravans come equipped with their own 240 volt power, their own hot water service, and everything else that's required. Now if that's not competition, I don't know what is.

BOB CATTO, Caravan Parks Association of Queensland: To the National Parks Service, we give them full marks. We say that the idea of bush walking, bird watching and so on is fine. It's a brilliant concept and we give full credit to the Service for that; but we do say that to allow a national park such as Cape Conway to issue permits, and the initial permit is issued for six weeks, this is a far cry from the original concept when national parks were set up. We say that at least after a week, there should be a small nominal charge so that the free loaders will not go in and stay for perhaps a month, or two months, or six months. At the height of the tourist season from 40 to 60 camping units are located at Cape Conway and this is to the detriment of such fine caravan parks as Island Gateway, Shute Harbour Gardens and Flametree Caravan Village. Now these caravan parks have poured lots of hard earned capital into creating assets to the tourist industry, and we feel that the Parks Service should make a small charge after one week, which may encourage the caravanners to use other caravan parks.

PETER OGILVIE: I'm sorry. I can't directly comment on that other than reiterating what I said. I would like to make one general comment though. What are the people coming to the caravan parks to see? I would suggest possibly it's a whole range of national parks that are offered to them.

DR DES CONNELL, Chairman: In conclusion, there are many other questions that people would wish to ask. I believe the Great Barrier Reef will go through a period where management and planning policies need to be properly developed and come to grips with problems that are likely to arise in the future. The panel has given a good insight into their thoughts.

WORKSHOP SESSION FOUR

RESEARCH AND DEVELOPMENT - PREPARING FOR THE 1980's
(Chairman: Nevin Ellis, Department of
Industry and Commerce)

The Role of the Commonwealth Government in
Relation to Tourism

by

NEVIN ELLIS

The Commonwealth Government's specific involvement in this industry is fairly recent and began with a small group of officials in the tourism branch in the old Department of Trade and Industry. This branch was part of an exports development division and that perhaps gives you the clue to why the tourism branch was set up. The tourist industry was looked upon as an export industry and this branch developed policies for the government to consider on a number of issues such as depreciation allowances, investment allowances, overseas marketing and promotion, and the development of a capital structure for the industry and the possibility of direct government assistance in that aspect. This branch formed the nucleus of the Department of Tourism and Recreation which was created by the Whitlam Government at the end of 1972 and three years were spent by that Department in fairly imaginative and what we believe to be helpful programs of encouragement and assistance to the tourist industry. This Department was abolished by the present Fraser Government in December 1975 and the tourism activity was transferred to a newly expanded Department of Industry and Commerce. A small group of experienced officials is continuing to provide advice to the government on a widening (I emphasise the word "widening") range of important issues and specific projects of importance to the tourist industry. The communication channels between the industry and the government have been multiplied and made more effective.

Specific research programs, particularly those of a qualitative nature are no longer carried out by the Department because of general cuts in government expenditure but the needs for facts both qualitative and quantitative continues to be recognised even more now than before. We've heard during this workshop a great deal about the need for more research and statistics. John Pigram made some helpful suggestions, and Eric Grimes in his address said that the industry is plagued by uncertainty. Steven Le Page emphasised the need for market

research and suggested that if this was the major message that came from this workshop it would be a useful recognition. Now the lack of basic data both quantitative and qualitative for the tourist industry presents difficulties both for you in the industry and for us in government. Figures directly relevant to the industry are provided by the Australian Bureau of Statistics on only a few things such as overseas arrivals and departures, and balance of payments and tourist accommodation.

In order to gain a better understanding of the economic significance of tourism, reliable data is also required on employment, capital investment and the industry's contribution to gross domestic product.

The Australian Tourist Commission has recently (because of increased funding provided to them in the 1978/79 Budget), undertaken an international visitor survey. This is the second such study that it has done. The study took place on 1st April this year and will provide a detailed analysis of visitor characteristics, for example, the purpose of visits, the planned lengths of stay and the places intended to visit. It's been mentioned several times already at this workshop that the Bureau of Industry Economics is undertaking a major study of the economic significance of tourism in Australia and we in our own Branch are working together with the Bureau in providing resources for this study. The Bureau recently issued a working paper that has been mentioned earlier, in which preliminary estimates were made of tourism's contribution to gross domestic product and employment. Using input-output analysis, the study group was able to trace the effects of tourism throughout the economy. It is intended that the Bureau will undertake a new tourism expenditure survey in the next financial year which together with the Australian Tourist Commission's qualitative international visitor survey currently under way will allow the Bureau to update and improve its estimates of tourism's contribution to the economy.

In addition the Bureau hopes to be able to examine the effects on the Australian economy of various possible outcomes from international airfare changes using the same methodology that was developed in the working paper.

I cannot stress sufficiently the importance of this economic study. The industry has complained as we officers have (perhaps not as vocally) but we are just as conscious in government service of failure by government, and failure by the community, to recognise the tourist industry. It is a manifestation of its fragmentation which we believe we can overcome, if we can quantify what that industry means in terms of employment and dollars in pockets of people who live and work in this country. That is the whole purpose of this economic study.

I would like also to mention that there is in Australia a considerable body of research available on the attitudes of people. Much of the research is locked away in the cupboards and the files of private institutions and private companies. Some is in government files as well, so we decided to try and unearth as much of this as possible and at least draw to the attention of the industry where it could be obtained, and we published a bibliography of tourism research in Australia last year.

We believe that while research should continue and be constantly updated, there's a very real need for the industry to make much greater use of the research already available.

Not only research which provides the facts but greater skills in interpretation are required. We have heard that interpretation of research results applied to the Great Barrier Reef is vitally important to good decision making and it reminds me of a story that perhaps you may have heard before. Interpretation is very much in the eye of the beholder and the story relates to a situation where two rival shoe manufacturing companies sent sales research teams to a newly opened market in Africa. After they spent some time there, one team sent a message back to head office saying that there were no prospects in the region as the locals just didn't wear shoes. Now the other team spent the same time there. Their message back to headquarters was "market wide open - nobody had any shoes", so the difference in interpretation makes a great deal of difference to the line of action that can be taken.

Those of you who accompanied us on the superb DC9 reef flight today had a tremendous opportunity to learn about the Reef and full credit must be given to the Marine Park Authority for the inclusion of this flight in our program and the concept of the inflight commentary by officers of the Authority and the Queensland National Parks and Wildlife Service.

Research Needs for Tourism Development and Promotion

by

DR JOHN J. PIGRAM

(Department of Geography, University of New England)

1. INTRODUCTION

The establishment of the Great Barrier Reef Marine Park Authority provides an opportunity to develop a satisfying leisure environment for tourists in keeping with the capacity and characteristics of the resource base in this delightful region. This opportunity may be lost if the creation of the Marine Park is allowed to proceed without systematic and comprehensive research support.

2. THE ROLE OF RESEARCH IN TOURISM

In common with other sectors of the economy, tourism requires a solid information base as an aid to sound decision making. The quantity and quality of information called for can only come from a far reaching research program designed to provide an assessment of the resource base for tourist activities, as well as facts and figures on industry volume, throughput, patterns of demand and expenditure, travel modes, and various other aspects of consumer leisure behaviour. This is as true for the tourism industry, nationally and regionally, as it is for the individual entrepreneur.

There is a widespread belief that such data are not compiled and do not exist in Australia. From the point of view of ready availability this conclusion is probably correct. A considerable volume of profile data appears to be generated by large corporations and government bodies by way of records and official statistics. As well, numerous reports and in-house surveys have been commissioned by public and private organisations for specific purposes. However, the findings, typically, are for the exclusive use of the organisation concerned and are otherwise not generally accessible.

At an official level there is evidence of increasing awareness on the part of public institutions of the need for an adequate data base for the tourist industry as a whole. The first real initiatives were taken in 1973 under the auspices of the shortlived Department of Tourism and Recreation. More recently the Domestic Tourism Monitor commenced in 1978 using an opinion poll organisation to survey travel habits as a basis for market identification and forecasting (Rieder, 1978). In 1977-78 also, the Bureau of Transport Economics conducted a

National Travel Survey (Moll, 1978). This renewed interest in research was reflected in the enquiry by the Federal Parliamentary Select Committee into Tourism and culminated in the holding of an Australian Travel Research Conference in Sydney in September 1978. One positive outcome of the Select Committee enquiry was an undertaking by the Bureau of Industry Economics to carry out a case study of the tourist industry (Select Committee Report, 1978).

Whereas it is gratifying that moves are under way towards the beginnings of a data bank on tourists and tourism in Australia, care must be taken to ensure that the information compiled is appropriate, readily understood and used. In this regard a corollary of data collection may well need to be the fostering of a conviction on the part of tourist operators as to the worth and relevance of research output. Perhaps through ignorance or lack of understanding, management appears to have almost a paranoic fear of research, especially where it may reveal facts at variance with present policies and programs. Others, confused by the mystique often surrounding the activities of research consultants, tend to treat their findings with disdain and prefer to rely on intuition, experience or "gut-feelings". Informed opinion is fine to a point, but if carried too far, individual bias can distort assessments and reactions. Hard data are needed on which to base decisions about promotion, investment, for example, and this calls for systematic investigation of resource potential supported by market research, both quantitative and qualitative.

Research doesn't replace intelligent judgement, but it does help to clarify decision making and balance subjective hunches with a measure of objectivity. Research also helps delineate historical trends for projection into the future and can provide benchmarks or norms against which to measure the success or failure of marketing objectives (Stewart, 1978). Tourism has the potential to be Australia's fastest growing industry. At the same time it is highly competitive and sensitive to a wide range of internal and external influences. In this context research is a vital tool to allow management to prepare and provide for the dynamics of a volatile tourist market.

3. INITIATIVES IN TOURISM RESEARCH

So little systematic research has been carried out into Australian tourism and so much remains to be done that it is difficult to single out the most pressing problem areas. As noted earlier, the beginnings appear to have been made in the compilation of basic statistics on an industry level. Provided they are consistent in format and are not conducted on a

one-off basis, these initiatives could generate the sort of continuous data which the industry lacks so badly and help establish more accurately the contribution of tourism to Australia's development. Governments, thereby, should be able to identify the strategic issues involved and determine their priorities for assistance to tourism.

This of course, is not to say that preliminary exercises in data gathering of this kind are satisfactory or in any way complete. For instance, such studies are essentially market-orientated and appear to ignore the impact of tourism - whether environmental, social, or economic - on destination zones and host populations. In the same way, few attempts have been made to inventory and categorise the resource base for tourism or investigate areas of tourist potential. Nevertheless, systematic monitoring of travel patterns is welcome and series data of a demographic and motivational nature should have wide application in the tourist industry. However, despite the optimism voiced at the 1978 Travel Research Conference, such nation-wide surveys would appear to have limited relevance to specific regional situations such as the Great Barrier Reef, where little tourism research has been carried out since preparation of a Visitor Plan in 1971 (Pannell, Kerr, Forster, 1971).

Further deficiencies in past, current and proposed data compilation on tourism were pointed out at the 1978 Conference (Simpson, 1978), where existing data sources were described as useful, but inadequate for practical commercial decision making. Simpson went on to summarise what he saw as the areas of responsibility for data acquisition:

- data on the transportation sector should generally be collected in the public sector as would existing collections of series data over a wide range of topics;
- data on market profiles, on consumer attitudes and experience (qualitative data) should as far as possible be collected within the regional tourist organisations, promotional bodies and the like; and
- data on industry performance, cost, performance ratios, visitor expenditure patterns, (should be collected) within the industry organisations or common industry groups.

(Simpson, 1978)

Whereas Simpson appears to take as given knowledge of tourist resources, his suggestion of a regional initiative in the collection of profile data is most relevant for tourism on the Great Barrier Reef. Ideally, this would involve an incremental program of research along the following lines:

1. recognise there are many segments in the market;
 2. identify the segments worth time and consideration;
 3. study these segments to determine their characteristics and motivations;
 4. achieve some product design based on the motivational concepts of the original groups; and
 5. evaluate the results in terms of profitability.
- (Stewart, 1978)

Such a program again calls for both quantitative and qualitative research. Quantitative research is concerned with figures and basic statistics, e.g., facilities (number, type, capacity, occupancy, operating costs); spending patterns; travel modes and routes. Large representative samples are required to provide a type of census, both of the supply structure of the tourist system and the demand side in terms of profile data and the activities of the tourists themselves. Qualitative research attempts to delve into the feelings, attitudes, beliefs, motivations, and perceptions of visitors.

In a consumer-orientated industry like tourism it is vital to have up-to-date information on travellers and potential travellers and to acquire some awareness of the real workings of the customers' collective minds (Palmer, 1973). It is important to know not merely the type of people currently being attracted (e.g. their background, age, sex, family stage, occupation), but why they come, what do they expect to find, who influences their decision making, what are their satisfaction levels, and how do their expectations differ from their actual experience.

Qualitative research in tourism must be aimed at what tourists think, not what management (or researchers) thinks they think. Those responsible for the investigation and development of tourist resources are not always able to interpret user preferences accurately. This situation is symptomatic of a communications gap between management and the consuming public. It is just not good enough for decision makers in the tourist industry to operate in such a public opinion vacuum. Yet according to Palmer (1973) qualitative research is often the missing link in tourism marketing. Certainly it is more difficult and time consuming to undertake, but it is essential because of the insight it provides into the "image" of the travel experience perceived by the visitor or potential visitor.

The tourist image is, in part, a function of inherent beliefs, impressions or "hang-ups", and in part, derived from conscious efforts of promotion, advertising, and publicity (Gunn, 1972). The resultant composite image is of utmost

importance; it is the decisive factor in the process of selection and decision making. Creation of an appealing tourist image really amounts to giving an attraction or a region an atmosphere and a "personality" or easily remembered identity. Once the image is established it is up to management to ensure that it continues to be projected in a meaningful way to the market.

Tourism is a distinct form of recreation in which choice and discretionary use of time and money are integral components. A tourist experience is bought and sold in a competitive trading environment marked by close substitutes, where product differentiation is the basis for success. A tourist zone on the scale of the Great Barrier Reef, with its wide range of attractive features, both natural and man-made, offers a diversity of settings for tourism. In such circumstances promotion of specific tourist experiences for each market segment becomes possible. At the same time, grouping of attractions promoted in tandem has sound potential. Linking of a variety of tourist experiences as a marketing package in this way, perhaps with composite admission vouchers, reciprocal discounts, and regional "passports", is a promotional strategy which should enhance overall patronage and visitor satisfaction. This sort of approach too, could do much to offset parochialism and broaden awareness of what this new marine park environment has to offer.

Systematic research both beforehand and as a follow-up to such programs is the key to ensuring that the promotional thrust is properly directed. Ultimately, continued success of tourist enterprises will depend first upon what is revealed in the findings of consumer surveys concerning vacation patterns, habitual tourist behaviour, site activity, loyalty, and effectiveness of different exposures and advertising strategies. Secondly, attention must be directed to ensuring that an appropriate response is made by management, so that trends may be anticipated, the preferences of tourists may be anticipated and accommodated, and the number of disappointed, dissatisfied visitors reduced.

Of course all these initiatives again, are market-orientated and people-centred. This type of research may well identify target populations and through effective promotion lead to increased patronage of the park. However, whether the stimulus to tourism is sustained also depends very much on maintaining the quality of the reef environment - presumably the primary factor in attracting tourists in the first place.

4. TOURISM AND THE ENVIRONMENT

An important consideration in the development of all tourist attractions and regions is the effect on the environment - considered here in the broadest sense as encompassing socio-economic and cultural elements as well as physical phenomena. Certainly, in the Great Barrier Reef Marine Park the most obvious impacts are likely to occur in natural areas, i.e. in the ecosystems of the coastal zone, the islands and the Reef itself. However, the built environment too, may show the effects of tourism by way of an ugly landscape of visual pollution. Again, environmental resources also include people and tourism and can affect customs, attitudes, traditional values and the way of life generally.

Any discussion of tourism in an environmental vacuum is meaningless because attributes of the environment form the essential framework of the resource base for pleasure travel. Tourism and the environment are not merely interrelated, they are interdependent. The viability of tourism rather than conflicting with conservation, actually demands it, otherwise visitor satisfaction will be reduced as the inherent appeal of the tourism setting is eroded. Whereas tourism can cause environmental degradation and therefore be self-destructive, it can also lead to substantial enhancement of the environment. Development of tourist attractions and facilities for example, can contribute to a more efficient transportation system, improved health and safety standards, and better managed habitats for fish and wildlife. Wider recreational and social opportunities can also result from harmonious interaction between locals and visitors - a sort of "cultural multiplier" effect.

Nevertheless, it must be conceded that negative environmental impacts can occur from the predatory effects of the seasonal migration of tourists. Pollution in all its forms, erosion of natural qualities, congestion and overtaxing of infrastructure and basic services, and conflicts between visitors and residents can all form part of the process. The point is that it does not have to be like that. Tourism and conservation can be organised in such a way that both benefit and give each other mutual support.

Satisfying tourism settings should grow from natural forces and be complementary and compatible with them. Appropriate design of tourist facilities using local materials to blend with the environment, close attention to principles of effective location and site selection, the implementation of necessary management strategies (zoning, some restriction on access so as not to exceed carrying capacities, etc.), and

enlightened interpretation programs to educate visitors concerning environmental values, can all help to mitigate undesirable impacts from disordered growth of tourism. In particular, the pursuit of economies of scale through development of ever-larger and more sophisticated tourist complexes needs to be questioned. In tourism, as in many aspects of modern society, small can be beautiful.

Thus, for tourism the Reef environment should represent not a constraint but a resource and an opportunity. Of course such a desirable state of affairs could not be expected to occur spontaneously. It will not be easy to reconcile the uncontrolled emergence of mass tourism with the need to maintain the natural and human heritage. For example, in the Great Barrier Reef Marine Park substantial material interests will be at stake in the many public and private enterprises which emerge to service the park and its patrons. Laissez-faire attitudes to development proposals are unlikely to achieve the desired outcome. Appeals to the ethics of developers, likewise, will probably need to be supported by more coercive measures designed to ensure that environmental limitations are observed from the planning stage. Physical feasibility studies and economic cost-benefit analyses will have to be supplemented by environmental impact assessment and ongoing monitoring of the effects of tourism on natural and human systems. As for park users, continuous education campaigns in major destination areas adjacent to the Reef, directed towards desirable norms of behaviour, may eventually make unnecessary the implementation of more restrictive management options.

Once again research has a vital role to play, first in the evaluation of the potential of the resource base for tourism and then in the delineation of fragile or sensitive areas likely to withstand only limited tourist use. This is not meant in a negative way. Parks, including marine parks, are set aside for public use at levels in keeping with maintenance of environmental qualities. Carrying capacity is an elastic and dynamic concept and concern for fragile ecosystems need not be taken to the point of exclusion of visitors. Much more precision is needed in defining the "Reef environment". At the same time, all areas of the proposed park are not the same either in their characteristics, their appeal, or their durability. It is the task of field research teams to provide a basis for zoning, for the selection of more and less intensive use areas, and for the effective location of tourist facilities. A further important consideration is the need to ensure that at least a substantial part of the recurrent costs of environmental conservation is generated from visitor revenues and tourist developments within the park.

5. CONCLUSIONS

In summary the contribution of research to the process of development of the tourist potential of the Great Barrier Reef Marine Park may be traced through the following steps (suggested by the Irish planning body, An Foras Forbatha):

- (i) Market survey to establish tourist preferences.
In a region such as the Great Barrier Reef a range of attributes, attractions and facilities could be envisaged.
- (ii) Identification, evaluation and mapping of resources for tourism, which of course, reflect in part, preferences of the tourists themselves and should indicate potential conflicts.
- (iii) Defining of areas for tourist development, especially in relation to their spatial arrangement relative to one another, and their potential for expansion and satisfaction of tourist demands.
- (iv) Check of the capacity of each area to absorb tourists in terms of the resource base, cultural values and infrastructure.
- (v) Detailed planning of the physical development of tourist attractions and facilities in stages and incorporating environmental safeguards.

(An Foras Forbatha, 1970)

This procedure has been applied to several areas and scenic routeways in Eire with considerable success. Clearly the process would involve constructive co-operation between management, local and regional administration, individual tourist operators, and planning and research teams. In the context of the Great Barrier Reef Marine Park it would be comforting to know that the Park Authority was making provision for the research input necessary for the creation of a satisfying leisure environment for visitors to this delightful area.

Comments on methodological approaches to data gathering, sources of available expertise and the problems involved in tourism research are summarised in Appendix I.

APPENDIX I

1. INTRODUCTION

Comprehensive planning for tourism calls for:

- evaluation of the resource base;
- assessment of facilities, services and infrastructure;
- impact studies, both environmental and economic;
- market research, quantitative and qualitative.

2. RESOURCE BASE

Inventory, mapping, and evaluation of resources, sites, and reef/submarine phenomena of tourist interest: existing/potential, natural/man-made:

- location and access;
- characteristics and recreational opportunities constraints;
- visitation patterns;
- management and promotion;
- potential for development.

3. FACILITIES, SERVICES, INFRASTRUCTURE

Assessment of provision of tourist accommodation - islands and coastal zone adjacent to the Reef:

- relative location and spatial imbalance;
- range, quality, and services available;
- capacity and occupancy rates;
- tariffs and incentives;
- management, staffing, etc.;
- potential for development, e.g. convention facilities, resorts, low-cost facilities.

Assessment of tourist services for visitors to the marine park (food, shopping, entertainment, speciality establishments and services, transport facilities, information and interpretation services, cultural outlets, sporting facilities):

- relative location and spatial imbalance;
- patterns of usage, especially tourist vs residential;
- range, quality, adequacy and cost;
- deficiencies, constraints, and potential for development.

Assessment of infrastructure for tourism in the Reef environment (water supply and sanitation, power and communications, transport network, public services, health care and safety, etc.):

- availability and range;
- quality and adequacy;
- deficiencies and potential for improved infrastructure.

4. IMPACT STUDIES

Assessment and monitoring of the current/potential impact of tourism on the natural environment of the marine park, with reference to the characteristics of ecosystems, carrying capacities, scope for protective measures/restoration, and for environmental enhancement:

- delineation of special restricted areas of scientific value, e.g. habitats of endangered species;
- definition of "sensitive" areas with appropriate guidelines for development;
- preparation of zoning and management plans including areas of intensive use and submarine areas (including artifacts/wrecks), controls on fossicking.

Assessment of the social impact of tourism on residential communities ~~to identify attitudes to tourists and actual/potential sources of conflict:~~

- negative impacts, e.g. overtaxed infrastructure, congestion of facilities/traffic, increased prices, social problems (crime, vandalism, health risks, drug addiction, pollution, police records, etc.);
- positive impacts, e.g. seasonal opportunities for employment/rental accommodation/demand for services, increased supply and range of goods/services, improved transport linkages, wider social contacts, etc.

Analysis of economic benefits and costs of tourism:

- benefits - survey of business houses to determine direct/indirect generation of turnover/employment including multiplier effects, increased tax receipts, increased capital investment, fuller utilisation of existing resources/facilities/services, etc.;
- costs - study of official statistics for information concerning increased pressure on infrastructure, expansion of facilities/services catering only for peak demand, speculative land values, seasonal under-utilisation of plant/capital/labour, etc.

5. MARKET RESEARCH

Visitor surveys to generate profile/activity data on tourists:

- origin and demographic characteristics;
- activity patterns and expenditure;
- travel modes and routes;
- sources of information and motivation;
- preferences and perceptions of Reef resorts and attributes;
- satisfaction levels and potential for diversified activities/attractions.

6. METHODOLOGY

Selection of the research methodology depends upon:

- resources (funds/available expertise);
- time and seasonality constraints;
- purpose of study;
- validity/reliability required.

Successful research depends upon:

- choice of the right research team (professionalism/objectivity);
- choice of the right parameters (timing/duration, appropriate samples, response rates, survey locations);
- choice of the right questions/indices (and co-operation);
- pilot survey/pretesting - allowance for poor weather/non-response;
- sound fieldwork/analysis/interpretation/presentation;
- response to research findings by the Marine Park Authority.

A range of approaches is possible, e.g. visitation patterns can be derived from:

- study of existing records/statistics/permits, etc.;
- observation and counting/recording systems, including remote sensing;
- telephone surveys;
- personal interviews or questionnaire surveys (on-site, in-transit, or home-based).

Source of research expertise include:

- government agencies;
- private consultants;
- tertiary institutions.

The Great Barrier Reef Marine Park Authority could well consider the benefits of in-house expertise and establish its own team of research personnel to cope with the great range of research necessary for the successful creation and future viability of the marine park.

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Discussion (Chairman - Nevin Ellis)

JANE DEAKIN, Department of Tourism: Is there a gap between research by governments for the industry, and research done by the tourist industry for the tourist industry? One could get the impression that most of the research you were talking about was research which really should be done by government because it's large scale and very gross in its application.

DR JOHN PIGRAM: There is a division now. I'm suggesting a way to bridge this division. We can use the research expertise and initiatives of travel agents and tour operators, simply ask them to make available their figures, their entry vouchers, and whatever records or documents they keep instead of keeping it to themselves. There would be confidentiality of course. The government's role or the Authority's role would be in co-ordinating this information. There's a great bank of data out there which people aren't aware of or if they are aware of it, they're keeping it to themselves for good commercial reasons. It's the government's job to convince private enterprise to unlock that data and to co-ordinate it when it does become available.

The Great Barrier Reef Marine Park Authority:
Its Future Role in Research and Planning
for the Development of Tourism

by

RICHARD KENCHINGTON
(Great Barrier Reef Marine Park Authority)

During the decade of the 1960's, the Great Barrier Reef came to public attention as an immense, unique natural structure of great beauty and wonder of the world. Public attention was drawn because the 1960's saw a rapid increase in availability of reliable diving gear, underwater cameras and lightweight boats. More and more people were able to visit the Great Barrier Reef and importantly they were able to show photographs of what they had seen and bring the Reef to the new world of television.

Also in the 1960's - following the writings of Rachel Carson and others - public and political concern was aroused by awareness of the limits of global resources. There was particular concern over the loss of the natural environment and over the increasing number of hazardous and unpleasant phenomena which could be shown to be linked to the activity of man.

Against this background, there developed wide-spread public concern, within Australia and overseas, for the future of the Reef. This may be summarised under four headings:

- (a) Concern that one of the great natural heritages of the world should be conserved and preserved for future generations;
- (b) concern at locally evident deterioration;
- (c) concern at the possibility of over exploitation of the natural renewable resources of the Reef; and
- (d) concern at the possible impact of pollutants.

The passage in 1975 of the Great Barrier Reef Marine Park Act was the consequence of political recognition of the urgency of this widely expressed concern.

Section 32(7) of the Great Barrier Reef Marine Park Act provides that:

In the preparation of the Park plan, regard should be had to the following objects:-

- (a) the conservation of the Great Barrier Reef;
- (b) the regulation of the 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 by the public; and
- (e) the preservation of some areas of the Great Barrier Reef in its natural state undisturbed by man except for the purpose of scientific research.

The Authority is thus a resource planning and management body. It is a 'people-oriented' body required to make provision for proper use of the Marine Park, for reasonable exploitation of the resources of the Great Barrier Reef and for the enjoyment of the Great Barrier Reef by the public as well as for preservation of some areas of the Great Barrier Reef.

This paper is addressed primarily to the Authority's future role in planning for the development of tourism policy on the Great Barrier Reef. It is however important to discuss the future in the context of past and present planning preparation for all the functions of the Authority.

STUDIES CONDUCTED TO DATE:

1. Reviews

Bibliography of the Great Barrier Reef

One of the first research contracts let by the Authority was to Dr E. Frankel of the University of Sydney for the preparation of a comprehensive bibliography of the Great Barrier Reef. This bibliography was published recently, it runs to some 200 pages and covers popular literature and films as well as the more scholarly scientific studies.

The bibliography indicates the extent of such recorded and traceable knowledge of the Great Barrier Reef as was published by January, 1978. It will be updated at regular intervals. The bibliography can be purchased from most AGPS bookshops.

Scientific Review

The Frankel bibliography is a comprehensive listing of the literature. A parallel initiative was the preparation by the Great Barrier Reef Committee of the report compiled from the scientific literature relating to the Capricorn and Bunker Reefs.

The Great Barrier Reef Committee is an association comprised largely of scientists who work or have worked on the Great Barrier Reef.

The Authority subsequently commissioned from the Great Barrier Reef Committee a series of scientific reports on other areas of the Great Barrier Reef, from Lizard Island in the north to the Swain Reefs in the south.

To the north of Lizard Island, the Great Barrier Reef is remote - and little visited by scientists. In April 1978, the Great Barrier Reef Marine Park Authority held a workshop in Townsville to review knowledge of the remote northern section of the Great Barrier Reef. The proceedings of this workshop can be viewed at the Authority's head office in Townsville.

2. The Authority's Resource Base Program

The Authority's aim is to have the best possible resource information achievable to form the basis of its planning for conservation, use and preservation of the Great Barrier Reef. This program will also provide important baseline information against which changes may be measured and the effect of zoning or management policies evaluated.

Biological Survey - corals and sedentary organisms

It becomes quickly apparent in considering the scientific literature that even in heavily used areas of the Great Barrier Reef there is little understanding of the distribution of biological resources in the area. Intensive scientific research, faced with an over-whelming number of problems, has been concentrated on small areas, often with little indication of the representativity of such areas.

An early initiative of the Authority was to conduct a workshop of reef scientists to develop a standard method for surveying the biological resources of coral reefs. This workshop resulted in the method in which snorkel divers view an area and classify it on the basis of physical characteristics and biological resources. This method has been used to survey the reefs of the Capricorn Ridge and produce maps of the distribution and abundance of coral communities in the area.

Physical survey

In parallel with the biological resource survey the Authority has been able to call upon the Australian Survey Office to achieve accurate physical survey of the submarine features of reefs.

By the end of 1979 the Authority will have extensive physical and biological survey data on the Capricorn and Bunker Reefs off Gladstone.

This survey data provides the baseline information at to the condition of the reefs at the time of the development of zoning or management plans.

Biological Survey - fish:

Fish are the principal attraction. Whether visitors come to catch fish or to look at them, the fish are a major factor in human consumption of the Reef.

Here again, surprisingly, there is little firm information. The conventional statistics for caught reef fish are based largely on fish sold through the Fish Board. The proportion of fish which is sold in this way is small and variable.

In the case of the small, colourful reef fish, there are careful painstaking studies of their behaviour and relative abundance at particular locations. Further, the passage of time has resulted in compilation of increasing lists of the number of species recorded at a few locations, but little inference can be drawn as to the representativity of the locations.

In November, 1978 on Heron Island the Authority held a workshop of fish specialists to consider the problems of achieving relatively rapid assessments of fish populations over large areas. A second phase of this workshop is to be held in May 1979 to conduct statistical checks of methods discussed and developed in the first phase.

3. Resource Usage Studies

The second phase in preparing a plan is to determine the uses to which the defined resources are being put and the value which people place on those uses.

A Study of Reef Activities

The initial step taken by the Authority in its reef usage research was to commission a study titled: "A Review of Selected Recreational and Professional Activities on the Great Barrier Reef". This study was undertaken in 1976/77 by Ms Alison Domm, herself a capable Reef researcher.

In 1971 (well before the existence of the Authority), a study was made on tourist activities on the Reef for the Australian Tourist Commission. This was a valuable study, but is now dated. It did not investigate the activities of a number of important users of the Reef; e.g. amateur clubs (diving, photographic, fishing, shell collecting, boating, sailing and conservation). The Authority's research was aimed at obtaining an overview of Reef use by such groups. This also covered small scale commercial operators, such as shell, coral and aquarium fish collectors, and professional underwater photographers.

There were two prongs to the research: the administration of a postal questionnaire (in fact four slightly different questionnaires were administered - one for clubs, one for individuals, one for professionals, and one for charter-boat operators); and an informal survey of opinion on a face-to-face basis along the Queensland coast.

The research ascertained the Reef activities of these groups, their attitudes towards the Reef, and which elements they valued.

Study on the Effects of Tourism on the Environment

In 1977, as a result of a world-wide study by the Organisation for Economic Co-operation and Development (OECD) into the effects of tourism on the environment, the Authority was invited to prepare a case study on a particular area of the Great Barrier Reef. Heron Island was chosen for the case study as it represented a unique area where the effects of human habitation since the 1920's on a coral cay/reef complex could be studied.

Much of the economic information sought by Mr Grant Hawley, the research officer conducting the study, was unavailable from either the tourist resort or the research station on the island. The case study nevertheless has proven extremely fruitful as a base-line study on the relationships between tourism and the environment. The study will provide a basis for the measurement of yearly trends.

The case study on Heron Island was prepared as a confidential document, however the OECD has the Authority's permission to include it in a special publication due for release in 1980.

A Study of Public Participation Techniques

The Great Barrier Reef Marine Park Act requires the Authority to take into account the views of the public in planning and zoning the Marine Park. The Authority believes that it cannot carry out its functions under the Act without the interest, understanding and support of the local and national 'Reef community'.

The Authority therefore commissioned a study which covered such concepts as: techniques for information dissemination; public discussion; assessment of perceptions; and evaluation of opinions.

The research report emphasised some of the important philosophical and practical reasons for public participation in decision-making. Two of these are worthy of repeating here:

- (1) people have a democratic right to participate in making decisions about activities which affect their interests; and
- (2) citizens have important skills and resources which can be of assistance to the formal decision-maker.

A Review of Social and Economic Research

In late 1978, the Authority commissioned the Commerce Department of James Cook University of North Queensland to report on the social and economic factors relevant to the Authority's functions.

That research found that it was essential for the Authority to have a detailed appreciation of the social and economic forces at work within the Reef Region, and that the current level of such knowledge was minimal.

Since then, an economic oriented research program has been initiated, and progress is being made on developing a program for sociological and psychological research.

SUMMARY OF RESEARCH TO DATE

The Authority has developed its research program in order to achieve knowledge of:

- (1) biological and physical resources of areas under study;
- (2) the current level of use of those resources;
- (3) social attitudes to reef activities; and
- (4) economic factors affecting reef usage.

STUDIES CURRENTLY UNDER WAY

Resource Studies:

The Authority and the Australian Survey Office will complete resource surveys of Lady Elliott Island and the remaining reefs of the Bunker Group by the end of 1979.

The Australian Survey Office has established geographic control for surveys of reefs north of Cairns and has completed surveys of Green Island and Arlington Reefs. The Authority will conduct biological surveys of Green Island Reef and neighbouring reefs later in 1979.

By the end of 1980, the Authority hopes to have baseline resource surveys of 28 reefs between Cairns and Lizard Island. This will provide a basis for work on declaration of the second Section of the Great Barrier Reef Marine Park.

Monitoring Biological Communities:

The Authority has recently let a contract to James Cook University of North Queensland for the development of methods for biological monitoring of the condition of coral communities. This study is to run for three years and will result in a protocol of monitoring operations which will be applied by Marine Park officials.

Geological Evolution of Reefs:

The Authority is supporting research by Dr P.J. Davis of the Bureau of Mineral Resources which is aimed at determining the pattern of geological evolution of reefs. This research has resulted in a series of hypotheses which are currently being tested. If they hold good in the face of further field trials, it will enable reef scientists and managers to classify reefs as juvenile, mature or senescent and also define their vulnerability to disturbance.

Reef Processes:

The Australian Institute of Marine Science and the Great Barrier Reef Marine Park Authority will conduct a five day workshop at A.I.M.S. for active Reef scientists. Three sessions organised by A.I.M.S. will review respectively

Geological, Chemical and Biological processes in coral reefs. A fourth session organised by the Great Barrier Reef Marine Park Authority will draw upon the latest scientific and technical knowledge to develop a practical monitoring program which will meet the requirements of scientific management of the Great Barrier Reef.

Remote Sensing:

The Authority is aware that LANDSAT and other satellite imagery has potential to make a major contribution to baseline survey and monitoring studies over the immense area of the Great Barrier Reef. A current study in conjunction with the Geography Department of James Cook University of North Queensland will evaluate the information return from ground survey, aerial photography at low and high levels and LANDSAT imagery.

Despite the obvious appeal of the technique it should be remembered that the basic unit of a LANDSAT image is approximately 60 x 80 metres. There is therefore a very real question whether LANDSAT images can be interpreted to give useful data on reef profiles and coral cover. The research project is therefore designed to test whether the technology can become a key element of planning, monitoring and surveillance of the Marine Park.

RESOURCE USAGE STUDIES

Recreational fishing:

Catching fish is the single most important recreational use of the Great Barrier Reef. There have been many claims that fishing is declining and there have been predictions of local extinction of fish such as coral trout at particular reefs.

Dr Wendy Craik, a research officer with the Authority, is currently analysing detailed catch figures collected by amateur and professional fishermen over recent years.

The preliminary findings of the study are:

- where the reefs are a range of distances from port, there is an increase in catch with increasing distance from port;
- where data are available over a period of years, changes in catch are evident;

- . off Townsville, the same number but smaller fish are caught compared with 20 years ago;
- . off Innisfail, catches are smaller but the fish are bigger compared with earlier years;
- . in the Capricorn-Bunker area, catches have remained fairly stable for the last 20 years;
- there is some evidence that large coral trout and red emperor are less common;
- coral trout and sweetlip make up the majority of the catch off Townsville and Mackay;
- off Townsville, the percentage of coral trout is decreasing slowly while that of sweetlip is increasing;
- small boats catch more fish than very large charter boats; and
- many (about 15/man/day) small (about 1kg) fish are caught in the Capricorn-Bunker area, but these figures change with latitude. In the Cairns area few (about 5/man/day) large (about 3kg) fish are caught.

ECONOMIC STUDIES

Input-output Study of Capricorn and Bunker Reef Usage:

This study is designed to identify the probable immediate economic and employment effects of possible zoning or resource allocation decisions. The study is concerned with determining the 'economic impact' of present and future uses in terms of dollar flows and employment generated.

An Analysis of Policy Options for Great Barrier Reef Tourism:

Building on the foundation of the "Tourism and the Great Barrier Reef" Workshop, a study is being undertaken by Mr Mike Gibbings to predict and evaluate the likely future of Great Barrier Reef tourism. This broad-brush study will develop some probable future scenarios for Reef tourism. These will be based on predicting the likely changes in the important socio-economic values affecting Reef tourism. These variables are: real income; amount of leisure time; the price of tourism; the price of substitutes and complements; taste; population growth; and government policy. Obviously prediction is a key element in research of this nature. To some extent extrapolation of trends will be a reasonable guide to the future. However given possible changes in government policy to the tourist industry, extrapolation of trends may not be completely appropriate.

INTERPRETIVE STUDIES

Recreation/Tourism Interpretive Material:

The Authority has been developing and testing Reef interpretive material on Heron Island, to allow resort and research station guests an interesting and accurately based educative experience of the Great Barrier Reef. A prototype audio-visual program is to be shown during the course of the workshop. This program is intended to be viewed by island guests prior to their reef walk, the program will guide them to look for and appreciate the major features of reef top communities. The program will be valuable to island guests after their reef walk enabling them to identify features which they have seen. This audio-visual is based on Heron Island but could easily be modified to cater for other locations.

THE FUTURE ROLE OF THE AUTHORITY

The Authority thus sees that it has a critical role in preparing for the future of Great Barrier Reef tourism in three areas.

- (1) Identification of areas of special potential for tourism;
- (2) Development of codes of practice for the establishment of tourist facilities on reefs; and
- (3) Development of interpretive facilities and materials.

Identification of Areas of Special Potential for Tourism

The physical and biological resource surveys of the Great Barrier Reef Marine Park Authority have already enabled the Authority to identify areas of particular potential for visual tourism.

The geological research supported by the Authority promises to enable planners to make decisions based on an understanding of the vulnerability of a reef to damage. This will enable future tourist development to be sited in areas which are able to accept the activity generated without deterioration. This will conserve the resource and should increase the confidence of those considering substantial tourist investments.

In the fields of social and economic research the Authority plans to maintain a research interest and achieve presence in planning for and monitoring the development of Reef tourism. The Authority identifies Reef tourism as the major growth area of Reef usage and considers that it is likely to become a major economic force in Queensland and Australia.

The purpose of the Authority's research program will be to monitor social and economic developments in the world tourist market as they are likely to affect the development of tourism on the Great Barrier Reef.

Matching Resource to Demand

Despite the immensity of the Great Barrier Reef Region, there are relatively few of the 2500 or so reefs which are subject to more than occasional human usage. The great majority of locations are ruled out on the basis of remoteness, lack of access or absence of safe anchorages.

This means that the accessible reefs are subject to relatively heavy demand by all forms of usage. Thus, while the Great Barrier Reef as a whole may not be subject to heavy usage the few reefs which are accessible may be over-used to the extent of deterioration of the very elements which are valued by recreational and commercial users.

In the case of islands the issue is magnified. The islands focus activity onto reefs. There is, further, a fundamental problem for the development of Great Barrier Reef tourism or recreation. The continental islands are geologically stable and offer solid platforms for construction of tourist facilities but they are remote from the Great Barrier Reef. They may have fringing reefs but they typically have relatively poor coral cover and poor underwater visibility for observation by snorkellers and glass-bottom boat use.

On the other hand, the coral cays of the Great Barrier Reef are literally situated on top of major patch reefs with excellent coral and fine underwater visibility. The problem is that the cays are inherently unstable and subject to sand movement in response to altered current flow which could eventuate as a consequence of development.

To summarise, there are many locations in the Great Barrier Reef Region suitable for tourist development but few can offer guaranteed direct access to the Reef.

In considering demand, the Authority is aware of the increasing trend to adventure and active environmentally educational holidays. In particular, demand by diving and snorkelling visitors can be expected to increase.

The ideal is thus to match demand to facility so that the active Reef visitor sees the Great Barrier Reef whilst the passive visitor, who rates the Reef experience as a secondary or lower goal of his holiday, can visit the continental resorts. This is not a simple goal because of the added complexity whereby the remoteness of the Great Barrier Reef proper imposes a financial limitation to the active vacationer.

The Authority is studying the situation to determine the extent to which this could be alleviated by the development of interpretive facilities.

Development of Codes of Practice

The Authority is particularly interested in introducing codes of practice for the operation of Reef tourism. These range from such simple things as a requirement for private and charter boat operators to return non-biodegradable garbage to the mainland, design and installation and use of boat moorings on the Reef to minimise anchor damage to heavily used reefs; and detailed engineering design codes for constructing man-made structures on coral reefs.

The Authority is particularly interested in research into structural engineering because it can envisage, in the event of any substantial increase in Reef tourism, that demand will rapidly outstrip the few available island based facilities on the Great Barrier Reef. The future is likely to hold educational structures situated on patch reefs and designed to cater for day trippers. At the simplest, these may be similar to the facilities for day visits to Green Island Reef. At a more sophisticated level they might incorporate observatories and helicopter landing facilities. Further ahead, there may be residential platforms shared by the tourist industry and research institutions.

To summarise, the Authority is planning for the development of codes to ensure that development of tourism involves the minimum environmental impact and the maximum provision of facilities for Reef visitors.

Development of Interpretive Facilities

The pioneering work being carried out at Heron Island was mentioned earlier. The development of such interpretive material is an important aspect of the Authority's work. In the specific terms of the Act, it can be regarded as an integral part of the reservation of areas for enjoyment by the public. It also serves the function of educating the public so that in appreciating the Great Barrier Reef, they minimise the impact of destructive activities on the Reef. The underlying principle is that education should minimise the need for regulation and enforcement.

In the context of the tourist industry, the Authority considers that professionally developed educational material will help the Industry meet the demand for Reef experience.

Tourists may be classified on the basis of their level of activity and their intensity of interest in the Great Barrier Reef.

In the case of the most active and interested visitors there is a need for boating and diving facilities and a variety of reef areas to visit. For less active but interested visitors, a greater investment is needed to provide facilities such as observatories and glass-bottom boats. For the casually interested, there is a need for some attractive interpretive material: audio-visuals or films, so that he can at least claim experience of the Reef.

Sophisticated interpretive facilities can be expensive. There may well be instances in which a consortium of resorts would need to collaborate to establish and run an interpretive facility which, whether or not in itself profitable, would nevertheless be a major element in the drawing power and profitability of the consortium resorts.

In conclusion, the Authority considers itself an integral part of the Reef tourist industry and considers the industry an integral part of its charter to provide for public enjoyment of the Reef.

Discussion (Chairman - Nevin Ellis)

DR DES CONNELL, Griffith University: We've heard of the research currently underway and the Authority's professional research staff nucleus. But what of the future, what will be the balance of research carried out by Authority staff and outside consultants?

RICHARD KENCHINGTON: Most long-term research is currently done by outside consultants and university researchers. At the moment, and given staff ceiling constraints, it seems unlikely that the Authority will obtain staff of the two or three various disciplines we need for a well balanced research nucleus. The deployment of our staff has primarily been to develop in-house expertise and to define research problems to a stage where an intelligent brief can be written. Most research will continue to be carried out by universities and private consultants.

TONY PAGE, Griffith University: Of the research conducted by the Authority, will any of the results be made public? It seems that the data could be a significant management tool for resort operators on the Great Barrier Reef.

RICHARD KENCHINGTON: The Authority has released a number of publications, for example the report of a workshop held this time last year to consider the special conservation requirements for the northern area of the Great Barrier Reef. The Authority will be publishing the workshop on fish methodologies and the workshop on our benthic methodologies will be published as a compendium volume. We will possibly be publishing an atlas of the Capricorn-Bunker Reefs. I say possibly because we have collated a mountain of material.

SANDY PRIOR, Barrier Reef Diving Services: The Authority seems to be collecting a useful lot of baseline data in reefs north of Cairns which as far as I am aware, are not much used. We know that the reefs adjacent to the Whitsundays are fairly heavily used by the tourism industry and my question is, does the Authority have any plans for carrying out any baseline research on these reefs?

RICHARD KENCHINGTON: There are two approaches to baseline research surveying. One is a logical ordered sequence from one end of the Reef Region to the other, the second approach is to respond to demand. This latter approach is obviously the way government organisations must work. I would think that probably within three to five years we would be in a position to begin baseline surveys in this area and certainly we would be wanting to do that if there were major developments coming ahead and we were involved and actively part of the tourist industry.

Developments in Tourism Since 1971

by

ROY L. CLARINGBOULD
(Australian National Travel Association)

I have been asked to comment on the developments which have taken place in establishing travel as a major industry in Queensland since the travel industry appraisals and recommendations were published in 1971.

1971 was a vintage year for tourist appraisals: ANTA published its tourist appraisal in North Queensland, the report on the Queensland Tourist Industry by Mike Gibbings of the Economic Department of the University of Queensland was released and the Pannell, Kerr, Forster (PKF) Visitor Plan for the Great Barrier Reef was issued.

The report prepared by PKF for the Australian Tourist Commission in April 1971 entitled the "Great Barrier Reef - Visitors Plan", contained many interesting observations on the development of the tourist industry as a whole in Queensland and indeed Australia, apart from having particular reference to the Great Barrier Reef. Unfortunately as is all too common in Australia, this report seems to have got pushed into the background and forgotten.

An Interdepartmental Committee was set up by the Queensland Government and went very thoroughly into the report but Cabinet decided, early in 1974, that further consideration of the plan, put forward by this report, was to be deferred until after the report of the Royal Commission into the effects of drilling for petroleum on the Great Barrier Reef was available. The Royal Commission on the drilling for petroleum made its report late in 1974, but so far as I am aware, the PKF Report did not surface again.

The PKF Report contains a wealth of detailed recommendations, some of which have in fact been implemented. I propose to look at some of the main recommendations and demonstrate how far things have proceeded in the intervening seven years with regard to what has happened to the Queensland industry in general and to the Barrier Reef area in particular, as far as tourism is concerned.

BARRIER REEF AUTHORITY

The report's first recommendation showed a very real and urgent need for a Barrier Reef authority formed by the Federal and State Governments, acting in consort, with members of the scientific, education, conservation and business communities. The Barrier Reef authority would govern objectively and act independently of self interest groups. Its primary objective would be to nurture the best possible developments, and in some cases, non-development, in the Reef region, with a responsibility for promulgating, monitoring and enforcing standards of development on the Great Barrier Reef. Even such things as resort development would need to follow guidelines and be monitored by the Barrier Reef authority.

The Great Barrier Reef Marine Park Authority was in fact set up by an Act of the Commonwealth Government in 1975, but this was not a direct consequence of the PKF Report. The need for the Authority was highlighted by the joint Commonwealth and Queensland Royal Commission established in 1970 to investigate the issue of oil drilling in Barrier Reef waters and also by the Committee of Inquiry into the National Estate in 1973, which supported a proposal to establish a marine park.

In the event, the Great Barrier Reef Marine Park Act, which had the support of all political parties, was passed in 1975, but, as far as I am aware, the Great Barrier Reef Marine Park Authority as presently constituted may not have the teeth to enforce standards of development in regard to tourist plant for example which this report contemplated.

It seems to me that the Great Barrier Reef Marine Park Authority has an obligation to develop a particular type of tourism appropriate to the Great Barrier Reef. At least it should make some effort to inject a greater educational element into the holiday experiences of visitors to the Reef. At the moment the Reef tends to provide nothing more than a slightly unusual backdrop to the 'fun and games' package which characterises a normal holiday. The Marine Park Authority, in my view, should look at the possibility of producing films and even packaging tours such as the Reef flight we had today so the ordinary visitor can gain some idea of the miracle of the Great Barrier Reef - something more profound than beaches, a few pretty fish and attractive coral shapes.

FINANCIAL INCENTIVES

The next group of recommendations concerned financial incentives. The report strongly made the point that a great deal needed to be done to stimulate development. There was a critical necessity for both private incentives and the granting of government subsidies to remote region resort operators in order to provide developers with economically feasible projects. It was maintained that the cost of government incentive programs would be more than recouped by the additional revenue and taxes which would accrue to government.

The need for incentives was seen as an Australia-wide problem, but especially applicable to the Barrier Reef because the cost of developing accommodation and tourist facilities on island resorts was considerably higher than on the mainland. For example, capital was required for the supply of essential services such as power, communications, water, sewage, waste disposal, transport and air strips.

In addition to these incentives, the report contained recommendations for specific governmental expenditures on development works at an estimated cost at that time of \$16.5 million dollars. These were specifically related to Green Island's re-development, a Cairns waterfront scheme, re-location of Cairns airport and the extension of the Townsville airport. Very little progress has effectively taken place on these recommendations.

As regards financial incentives generally, I am well aware of the small school of thought which resists the granting of incentives to the tourist industry, but it seems to me that if we want planned development of the Reef area, in harmony with ecological requirements, then it is worth paying some price for it.

It is worthwhile looking at these proposals in detail to see just how far we have got in the intervening seven years.

The specific recommendations concerning financial incentives for development on the Great Barrier Reef were as follows:-

- (i) Direct subsidies to be granted to resort developers in remote regions to reimburse them for extra costs incurred in creating an infrastructure;
- (ii) Amortisation to be allowed under certain conditions, on all improvements erected on leased properties;

- (iii) An "insured mortgage scheme" to be established which would guarantee loans made to established region resort operators from commercial sources;
- (iv) Depreciation on buildings to be made an allowable deduction for hotel/motel and resort development;
- (v) Additional tax assessments on undistributed profits to be eliminated if such profit is required to amortise debt or is reinvested in tourist plant;
- (vi) A tourist resort developer to be allowed to write off costs incurred for land improvement; and
- (vii) Expenses incurred outside Australia on Australian tourist promotion to qualify for taxation rebates given to exporters generally.

In the event, nothing has taken place on the first three points, nor on point (v) and (vi).

With regard to point number (iv), depreciation of buildings, this is a matter which is of Australia-wide concern. As long ago as 1955, a tax free allowance for all buildings used in production of assessable income was recommended by the Hulme Committee. It has been recommended periodically by later enquiries, the latest being the Asprey Committee in 1975.

Australia is the only country amongst the OECD nations, which does not allow depreciation of buildings as a tax deduction and this matter has again been raised in the Federal Government by a joint submission from the Australian Accommodation Council. This concession is of fundamental importance to the whole tourist industry if development in new tourist accommodation is to be encouraged.

As regards the allowance of expenses incurred outside Australia on tourist promotion, the Federal Government recently included tourism in the Export Market Development Grants Scheme. While this tends to favour the larger operators who can afford to advertise overseas, nevertheless it is a valuable concession which at least recognises tourism as an export earning industry.

TRANSPORTATION

The next main body of recommendations made by the report concerned transportation. It was recognised that ease of movement, including convenient and reasonably priced travel can, by itself, stimulate the demand for a destination area.

Accordingly it was recommended that the Australian Tourist Commission, the Queensland Government and the Federal Department of Transport take action to improve air services in a number of ways:-

(i) Promotional fares - In this area there have been three initiatives which have developed on the domestic scene since the report:

- (i) Package fares: The total package costs are produced by a combination of a rebated economy airfare coupled with a rebated tariff at the destination. This type of business constitutes a big proportion of tourist traffic to the area and is steadily growing in importance.
- (ii) Stand-by fares: While these have only recently been introduced and may not be of such importance to tourist traffic, nevertheless they do represent an incentive to visit an area and will contribute to increased visitor flow.
- (iii) Cheaper international airfares: The Minister of Transport has, over recent months, announced a whole series of APEX fares applicable to overseas routes at certain times of the year. This will undoubtedly have the effect of increasing the inflow of tourists into Australia particularly at off-peak times. Whether Queensland gets its fair share of this additional traffic is doubtful, however until Brisbane Airport is brought to full operational standards and in the absence of concessional add-on fares between Brisbane and Sydney, Queensland is at a distinct disadvantage compared with Melbourne and Sydney. Of course just how much of this additional traffic will find its way to the Great Barrier Reef area, is again problematical.

2. The second point made was that consideration should be given to additional gateways into Queensland. Townsville in particular is mentioned.

In November 1973, the Federal Minister for Transport, the Hon. C.K. Jones, directed the Bureau of Transport Economics to undertake an economic evaluation to upgrade Townsville airport to international standards. Prior to that a feasibility study had been undertaken by a departmental committee comprising the Departments of Tourism and Recreation, Environment and Conservation, Northern Development, Civil Aviation, Urban and Regional Development and Treasury.

This interdepartmental committee concluded that the existing facilities at Townsville had a limited potential for future development and that a new terminal and runway would be necessary to overcome operational constraints.

It was considered that a new international airport would generate growth in the tourist and allied industries of the region, subject to satisfactory parallel development of appropriate accommodation.

The Bureau of Transport Economics evaluated the proposal and came to the conclusion that it would not be necessary to make a firm decision prior to 1980, on the assumption that such an airport could be justified by 1985.

More recently the House of Representatives Select Committee on Tourism recommended in its Final Report in October 1978 that an international airport be designated at Townsville and that the development work required be authorised as soon as possible.

The Select Committee took the view that an international airport in Townsville would not only facilitate a door to Australia's major attractions, the Great Barrier Reef and Ayers Rock, but would also open up the possibility of direct flights to Alice Springs and Papua New Guinea. There is no doubt that another international gateway in North Queensland would generate a great deal of additional visitor traffic.

3. The third recommendation on transport related to the introduction of international charter flights. Charter flights into Australia have been on an extremely limited basis for many years and there has been no real change in this policy, although recent fare reductions and increased frequencies of international flights into Australia generally might to some extent be considered as replacing the need for charter flights, but this is not the case. Charter flights would open up a whole new segment of the travel market - particularly special interest groups.

4. The report finally recommended that there be extended routes and increased frequencies of flights at the domestic level including charter flights. Basically, the domestic flights operating in Queensland are geared to servicing the needs of the commercial traffic generated by the Australian capital cities and this situation is unlikely to change. There is no doubt that it creates problems for the tourist traveller to the Great Barrier Reef if he wishes to travel more extensively within the region.

STATISTICAL INFORMATION

The PKF Report recommended that visitor surveys should be instituted at selected destinations throughout each year, in order that a profile of the tourist to this area could be gained and a meaningful measurement of the importance of the tourist industry would be available. The Department of Tourism in Queensland has for many years sought the incorporation of a Research and Statistics Section within its Department, but owing to shortage of funds, it was not until the end of 1977 that this section was established.

It is currently undertaking work on visitor surveys and compiling statistics on the importance of the tourist industry in Queensland, so at least a start has been made on this aspect. Nevertheless I still have a sneaking suspicion that the industry could do more for itself in building up a profile of its visitor traffic.

REGIONAL DEVELOPMENT

The PKF report recommended that each destination region should develop its own promotional efforts and recommend the establishment of regional visitor and convention bureaux to stimulate interest in and to attract visitors to particular regions.

Over recent years it has been the policy of the Department of Tourism in conjunction with the Queensland Board of ANTA to establish regional tourist bureaux. In the area of the Great Barrier Reef, the Far North Queensland Promotion Bureau, the Tropical Queensland Tourist Association, the Whitsunday Wonderworld Travel Council and the Capricorn Tourist Organisation have all been set up.

The Queensland government has provided some degree of financial support, but the bulk of the finances are obtained by subscriptions from local government councils and operators in the private sector. The report had suggested that the funding of these regional tourist bodies should be derived from a room tax on accommodation. This has been regarded by the Queensland government, and the industry generally, as quite unacceptable, as a room tax would have the effect of increasing accommodation costs, which are already high, bearing in mind that the accommodation industry in the area of the Great Barrier Reef already carried a heavy burden through inflated establishment and operating costs. Nevertheless, we must face the fact that most of the regional tourist associations operate on a shoe-string budget and that many of the operators in the industry do not give the regions the financial support they deserve and need. In retrospect, a room tax might not be such a bad thing.

It is my view that the role of the regional tourist association, both from the point of view of promotion and of developing community support for the tourist industry generally, is vitally important and that the government in Queensland should do more to underpin their operations with larger financial grants. Queensland does not compare favourably with New South Wales and Victoria in this regard. There should be a shift of emphasis to highlight the diversity of the tourist product in Queensland. Promotion at the regional level is the best way to achieve this.

ACCOMMODATION

As far as accommodation is concerned, the PKF Report considered that the "environment for tourism today (1971) along the Great Barrier Reef and the Queensland coast is, for the most part, the end result of some 30 years of poorly conceived and unstructured growth. The physical plant is out-moded and sometimes in poor repair. The development of attractions has been minimal in an area that is often referred to as the 'Eighth Wonder of the World'.

What is the situation eight years further on? There have been significant improvements right across the board. The developments which have taken place in Cairns, for instance, are quite dramatic and it now provides the centre of a thriving tourist industry. In the same way Townsville has greatly improved the quantity and quality of its accommodation facilities and restaurants.

The PKF Report comments favourably on the development then taking place at Dunk Island, due to the planning which preceded facility construction. TAA have taken over the management of this resort and it now provides a popular destination for its package tours. Similarly TAA has undertaken substantial investment at Great Keppel Island.

Hayman Island, operated by Ansett, provides a high standard of accommodation.

Island resort accommodation generally is undergoing an upgrading in quality and an increase in quantity but too often the development of package tours has resulted in screwing too hard the independent accommodation operators with a resulting low level of profitability which has meant that the revamping and refurbishing of accommodation is not being carried out when it should be.

Airlie Beach on the mainland has, on the other hand, greatly increased its visitor capacity by way of self-contained units. This caters primarily for the domestic market, however, and is not necessarily appropriate to the needs of the overseas visitor.

Caravan parks provide an important facility for the domestic visitor, particularly the car traveller and generally in the area there has been an improvement in the quantity and quality of these. But here we find an anomalous position where local government authorities insist on a high standard for privately operated caravan parks, while they continue to run their own caravan parks to standards which can only be regarded as less than satisfactory.

The PKF Report in the projection of accommodation requirements for the area looked to an increase from 2696 rooms in 1970 (made up of 2037 rooms on the mainland and 659 on the islands) to a total of 5800 rooms in 1980 (made up of 4000 rooms on the mainland and 1800 rooms on the islands).

In round figures this represents a target increase of about 100%. As far as I can ascertain this has not been achieved and the actual figure seems nearer 50%. Given even some encouragement on the financial incentive level, there is no doubt more accommodation would have been built.

But the PKF Report was concerned not only with the quantity of development but also the quality. It regards the Whitsunday region as "the only true destination area, along the Barrier Reef". The majority of the resort developments had "been in operation for better than 20 years" and capital restraints had dictated that "new additions to existing plant must be above all highly functional and inexpensive".

In the view of PKF, resort development should do two things. It should enhance the existing physical environment and it should create moods within that environment, achieved by site arrangements and supporting architectural design and materials. The end result is, of course, visitor satisfaction.

The PKF report goes on to develop criteria for resort development and these include:-

- it must develop a theme of relaxation;
- the complex should blend with the site and capitalise on natural features and views. Relief should be afforded from intense sun glare;
- accommodation units should be clustered to ensure privacy;
- tropical architecture should be the theme of the resorts;
- the use of local materials, whenever available, is suggested;
- colour should enhance the basic dignity of the structure; and
- the interior decor should complete the theme of the resort.

It is probably true that, in the main, we have failed to develop an aesthetically pleasing and distinctive type of architecture suited to our climate and environment. The typical Queensland homestead is a pleasant exception to this general rule.

In this field, it seems to me the Great Barrier Reef Marine Park Authority could lead the way by developing prototype designs as a guide for new resort and accommodation in the Great Barrier Reef Region. At least it could set guidelines of what is expected. But here in the Barrier Reef region we must not overlook the fact that over the last two or three years there have been some exciting developments which show that the industry is fully aware of the need to provide holiday resorts which achieve excellent standards of accommodation set in surroundings which preserve the special appeal of the Great Barrier Reef environment. The domestic airlines have shown their faith in the region by outstanding developments at Hayman Island, Great Keppel Island, Dunk Island and Wanderers Paradise at Airlie Beach.

And, of course, there is the tremendous Iwasaki tourist development projected for north of Yeppoon. The concept focuses on the creation of a great park which will not only provide a wide variety of accommodation, but will aim at preserving natural wild life habitats and development of botanical gardens set in a great park complex.

CONCLUSION

It is interesting to note that Qantas is gearing up for a flood of new tourists into Australia, rising to a 60% increase on the American route by 1980 ("Australian" 8 March 1979). The boom is expected following the introduction of new low price airfares, but the Marketing Director of Qantas warned that it would not last "unless the tourist industry acted". He said Australia needed reasonably priced and well presented 'ground-arrangements', low cost accommodation, organised tourist packages and a convention centre.

He also said that tourists would stay five or six times as long as in the past if the right accommodation and tours were provided. They would want to see all Australia, not just the east coast capitals.

The Australian Tourist Commission, in their overseas promotional campaigns, feature the Great Barrier Reef prominently. Its latest pamphlet "Make Friends for Australia", devotes a whole page to the Great Barrier Reef - to the exclusion of the Gold Coast and other areas.

Are we going to project into the future the "poorly conceived and unstructured growth" which the PKF Report spoke about in 1971? The new developments have broken away from this pattern and we must continue to plan a tourist product which does justice to the Great Barrier Reef in a way which allows visitors to gain some appreciation of the 'Eighth Wonder of the World'.

The State Government has a role to play in this. The Tourist Commission which it proposes to set up, must have a developmental component which will assist in the financing of accommodation establishments which will meet the criteria set by the Marine Park Authority.

We have left our run a bit late, but the challenge is there to build a tourist environment of which everyone in the industry can be proud.

Discussion (Chairman - Nevin Ellis)

ERIC GRIMES, Day and Grimes Travel Pty Ltd: Do you have any further details or information in regard to the new tourist council or authority which is to be set up and was the Australian National Travel Association or any other trade body consulted?

ROY CLARINGBOULD: I don't know any more about the new organisation than what I've read in the newspapers and that's very little. We from the Queensland Board of ANTA wrote to the Minister very early on when the advisory committee was set up and we offered our experience. For those of you who do not know, we have on our Board all the regional tourist associations, the Queensland Motels Association, the Hotels Association, the Royal Australian Car Club of Queensland, the bus proprietors, the Caravan Parks Association and the airlines. The Minister said he would let the advisory committee know, and we have so far not been approached, or asked to make any submissions. I have since followed that by other letters to the Minister and I've also invited Frank Moore to address our next meeting of the Board which will be held early in May.

BRAM NICHOLSON, Whitsunday Wonderworld Travel Council:

Mr Claringbould, thank you for your speech. Lots of points that we all laughed at, but they were deadly serious, in fact that's the reason they are so funny.

In relation to Airlie Beach and Shute Harbour, we need adequate loading and embarkation facilities for cruisers and public launches. Do you really believe we stand a chance of making any progress in upgrading the Shute Harbour terminal in the near future?

ROY CLARINGBOULD: If governments want to promote the Great Barrier Reef and areas like the Whitsundays as international destinations, then obviously they have to provide the infrastructure to bring the facilities up to some standard. Shute Harbour is the focal point of the whole of the Whitsunday experience and it is a disgrace. I don't know whether the newly constructed Proserpine airport terminal handles 2000 people a day like the Shute Harbour terminal, but if it's good enough to upgrade airport facilities what's wrong with upgrading launch travellers facilities? Are we second rate citizens or something?

QUESTION: We have been told in the Rockhampton district that the Iwasaki resort will bring in 25 planes a day. I don't know if you've seen Rockhampton airport, but it would need to be upgraded to handle such increased daily traffic. Is there any word of Rockhampton airport being upgraded?

ROY CLARINGBOULD: It would be in the pipeline closely following Brisbane and Townsville. I honestly don't know but it seems to me if the Rockhampton district is the location of the Iwasaki development then airport facilities should be upgraded to cater for increased air traffic. I attach considerable significance to having an international airport in Northern Queensland and to me it would be deplorable if the Iwasaki development took the precedent from Townsville being upgraded to handle international facilities. Without that northern inlet and outlet we haven't got the possibility of round tours through the whole of Queensland.

WORKSHOP SESSION FIVE

THE FUTURE OF REEF TOURISM AND RECOMMENDATIONS
(Chairman - Doug Nettleship, Markman International Pty Ltd)

Editor's note: At least 30 recommendations were submitted by the delegates for this final workshop session. Recommendations resolved in the affirmative are reprinted in their original form.

RESOLUTIONS BY THE DELEGATES

Marketing

1. That existing area groups from Rockhampton to Cairns join together to promote the Great Barrier Reef and the coast as a single product (as has been done for Tasmania), i.e., a "ginger group". Marketing of the product "The Great Barrier Reef"; needs to be more precisely segmented.
2. Community awareness:
 - (a) more local community awareness of importance of tourism is required; and
 - (b) an integrated approach to promotion of local attractions, e.g., Mackay sugar mills/Whitsunday Islands is required.
3. Information dissemination, promotions, marketing:
 - (a) product information needs to be clearly defined, e.g., an encyclopaedia type approach to provide more than an introduction to each tourist area;
 - (b) travel agents need to be more educated in product identification;
 - (c) a computer based information system linked to travel agents is needed;
 - (d) promotion in capital cities is important; and
 - (e) a need to develop face to face contact between the producer and seller.

4. Education was not fully discussed. A recommendation was made by Messrs Gerry Sutton (North Brisbane College of Advanced Education), and John Luscombe (Island's Management, Pty Ltd) that there should be liaison by the proposed joint "ginger group", with education authorities on the education needs and requirements of the tourist industry: Mr Sutton stated: "If we believe that the Great Barrier Reef is a tourist product and I believe it is the greatest single product in Australian tourism and the greatest corporate identity for Australia, then it should be marketed as a product with all the expertise of modern marketing techniques. To do this, I would move that we approach educational institutions and work in co-operation and liaise with them on the needs and requirements of the Industry".

Financial

1. Investment Allowance:

We support the recommendations of the House of Representatives Select Committee on Tourism on grouping of items which qualify for the investment allowance. Specific examples being refrigerators, colour TVs, stainless steel sinks and shower basins, the grouping of glass-bottom boats and outboard motors needed to run them. In general, things which are used as a unit, the components should be added together.

2. Dollar for dollar co-operative support between government and industry:

We appreciate the existing practice of dollar for dollar subsidy support from the Queensland Department of Tourism for regional brochures. This should be extended to development assistance by way of contributing to area promotional activities whether that promotion originates from local organisations or private companies or individuals, and this could apply to a particular zone or the State of Queensland.

3. Funds to up-grade facilities:

We seek funds from the State Government to urgently upgrade infrastructure development. Infrastructure development relevant to tourism has been neglected. Specific examples are the jetty and parking facilities at Shute Harbour, erosion control on Green Island and four high level bridges over the trouble spots on the inland road, pending the completion of the coastal road or re-routed Highway 1.

4. Depreciation allowance:

Depreciation allowance on buildings should be allowed, recognising the special role of buildings in tourism. We are one of the few countries which do not recognise depreciation on buildings as an allowable deduction.

5. Special development loans:

Need for special development loans or guarantees for approved developments which will help develop the tourist industry. We ought to set guidelines for the new "tourist commission" by specifically requesting that the commission seek funds from the general public and lend to new and existing operators at rates more attractive than with conditions of present development bank loans.

Environment

The meeting is concerned about the environment of the Great Barrier Reef both as a biological entity and as the basic tourist resource of this region, and emphasises the need for implementation of the following recommendations:

1. That the Federal Government should undertake to implement all of the recommendations of the House of Representatives Standing Committee on Environment and Conservation (Oil Spills Inquiry) as a matter of priority to:

- (i) improve the charting of the shipping channels of the Great Barrier Reef Region;
- (ii) improve navigational aids within these channels;
- (iii) establish compulsory pilotage by local pilots between these channels; and
- (iv) ensure the mechanical safety of vessels using these channels.

2. That the tourist industry support the Great Barrier Reef Marine Park Authority in principle providing that it continues to work with the tourist industry in an open forum on a continuing basis.

3. This meeting in recognising the fact that the tourist industry is ultimately dependent on the Great Barrier Reef Region as defined by the Act, supports the need for increased research into the biological resources of the area so that they may be maintained for the future viability of the industry.

Examples:

- the ecological effects of trampling and estimations of carrying capacity;
- the ecological effects of all forms of fishing and the development of fisheries management strategies;
- effects of discharge of sewage and garbage; and
- effects of harbour development on coastal dynamics.

4. That delegates recognise the benefits to the tourist industry of this Workshop and as a result request the Commonwealth Minister for Science and the Environment to ensure that the Great Barrier Reef Marine Park Authority continue to provide such benefits to the tourist industry. In particular the Workshop requests that the expertise of the Authority be available to train interpretive staff and advise in the preparation of brochures, audio-visual programs and trails in the area.

5. This meeting is concerned with the planning of tourism in the Great Barrier Reef area. It sees the declaration of a marine park or numbers of parks as an important attraction for tourists, particularly those from overseas where the title "Park" implies an area of high natural beauty. Therefore the meeting urges the Authority to declare a marine park or parks before the end of the year.

6. More mainland attractions and facilities are required for visitors in the popular destinations. National parks in some areas lack walking trails and picnic areas. The development of such facilities would enhance the visitors' experience of the region. This meeting asks the Queensland Government to provide the staff and resources to meet these needs.

7. That the Minister for Science and the Environment supply the Great Barrier Reef Marine Park Authority with staff and resources to carry out baseline surveys on the most intensively used in-shore areas at the earliest possible time, e.g., Whitsunday Islands - navigational charts, tourist information.

8. This Workshop recommends that the appropriate authority compile a list of architects who are experienced in designing accommodation suited to the climate and environment of the Great Barrier Reef Region which can be made available to proprietors who wish to upgrade their plant and build new accommodation. Prototype designs should be prepared for the guidance of investors.

9. That considerable emphasis be placed on environmental interpretation (education) by the tourist industry and relevant government authorities and that these bodies work together in providing interpretive facilities and activities throughout the Great Barrier Reef Region.

Transportation

1. There is an urgent need for adequate international airport facilities in the Great Barrier Reef region.

2. We support the recommendation of the House of Representatives Select Committee on Tourism for the introduction of regional charters from the Pacific region and New Zealand to Barrier Reef gateway ports.

3. In view of the fact that 86% of Great Barrier Reef visitors arrive by car, it is considered a matter of great urgency that the Bruce Highway be designated a major tourist route and upgraded to an all weather highway.

4. The travel industry believe that mutual benefits would accrue from the creation of an appropriate holiday atmosphere within aircraft flying from southern ports to the Great Barrier Reef, e.g., music, supplements to uniforms, temporary decor changes, appropriate food and drink, suitably printed cold towels.

5. This meeting is concerned that the 19 cents a gallon fuel excise applied to domestic flights and not international flights, and curfew restrictions limiting aircraft usage in Australia is contributing to the high domestic airfares which continue to restrict travel to the Reef region.

Policy

1. The Workshop expresses concern at the lack of consultation by the Queensland Government with the tourist industry and representatives in the formation of the new "Queensland Tourism Corporation". Such a corporation should be broadly based through the main segments of the industry.

2. The Workshop recommends that a permanent co-ordinating group or association of tourist operators in the Great Barrier Reef Region be set up to submit the proceedings and recommendations of this Workshop to the appropriate bodies for action and to brief local, state and tourist organisations.

3. The Workshop recommends that the permanent co-ordination group report to the industry and the Workshop on the progress of the recommendations.

4. While the Workshop deprecated the absence of VIPs at the Workshop, the delegates felt it could be counter-productive to dwell tediously on their absence at this time.

5. The Workshop notes that as a matter of policy, unions should be invited to participate in future workshops.

Editor's note:

Following the presentation of all resolutions, Peg Hayles (Hayles Magnetic Island Pty Ltd) moved that a committee be set up to report on the recommendations. The Chairman, Doug Nettleship, suggested the committee be a steering committee which would operate initially for three months without a constitution, but should be properly established and elected after three months. The motion was seconded by Chris Rodgers.

Nominations were called for and the following seven were received:

John Luscombe (Island's Management Pty Ltd)
Peg Hayles (Hayles Magnetic Island Pty Ltd)
Gordon McKauge (Laroc Pty Ltd)
Yvonne Katchor (Coral Point Lodge Motel)
Eric Grimes (Day & Grimes Pty Ltd)
Bob Catto (Caravan Park Association of Queensland)
Chris Rodgers (Orpheus Island Resort)

The seven people nominated were elected as committee members. The committee elected Gordon McKauge as Chairman and resolved to meet in Townsville within two weeks.

It was agreed by the Steering Committee that the resolutions be sent to the appropriate Ministers and Authorities and the Steering Committee agreed to report back to all registered delegates on their progress.

The resolutions as they appear above were agreed to by the majority of delegates although some delegates abstained on the grounds that more consideration was required.

CLOSING REMARKS

DR. JOE BAKER

(Member, Great Barrier Reef Marine Park Authority):

Mr Chairman, Ladies and Gentlemen, it's my pleasure on behalf of the Great Barrier Reef Marine Park Authority to participate in the official closure of this workshop. I'd like to thank on your behalf the following:

- . The Mackay City Council for providing this excellent conference venue;
- . The speakers and the chairmen of the different sessions. It is through them that we have been able to move pretty quickly through a very extensive agenda. No conference or workshop is a success unless we have the active participation of all delegates and I do thank you all for your participation. Lastly on your behalf I would like to thank the two young people who arranged and co-ordinated this workshop. I'm sure you will all agree with me that Grant Hawley from the Authority and Jane Deakin from the Department of Tourism assembled a stimulating and interesting program.

It is essential that the Great Barrier Reef Marine Park Authority know tourism; it is essential that the Authority has appropriate research programs always in accord with tourism. This workshop will be of primary importance in assembling a baseline for our tourism research.

In my opinion, you must analyse the value of this workshop. Were the papers and the speakers valuable? Was it good to bring new speakers who were not known to you? If it was who do you want next time? Will you follow the resolutions you've made? Will you put them into effect? I think the idea of establishing the steering committee is a good one but it must work. It must follow the resolutions and it must keep in touch with the tourism industry and keep moving forward.

I'd like to look at the objectives for which this workshop was convened. Firstly, to present an overview of the present and potential tourism on the Great Barrier Reef and adjacent coastal areas. Did the workshop achieve that, through the discussion groups and the many papers presented? The second objective was to publicise the developing involvement of the Great Barrier Reef Marine Park Authority in tourism on the Great Barrier Reef. Were you satisfied with our interaction

with you both formally and in a more relaxed social situation? The two and a half days of this workshop have been of great benefit for our Authority staff to meet many of you in a personal capacity. The third objective was to seek the advice of industry practitioners on the future roles of the two hosting organisations in tourist development. In the present circumstances - perhaps because of the forthcoming re-organisation of the Department of Tourism, I don't think we were really quite able to cover that adequately. The final objective was to recommend research which the workshop interprets as being in the interests of tourism to the Great Barrier Reef. Although perhaps a bold and progressive move with what I believe is a fragmented and many faceted industry, the Authority is now well aware of the need to design and collect a lot of baseline data that will assist it and the tourist industry. Information is required to recognise the numbers of tourists that utilise the Reef Region, who are they and where do they come from, what are their expectations and aspirations, how may information and interpretive facilities be best designed to provide greater benefit for all visitors to this valuable natural resource?

I'm hopeful that the recommendations which were passed by this workshop in session five will be forwarded by the Steering Committee to the appropriate officials in the State and Commonwealth governments and that these recommendations will be fruitful in providing a voice for the tourist industry.

If people such as tourist operators and marketers did not come to this workshop you must analyse why. Was it because they didn't identify this workshop as being of sufficient high priority? Was it the timing, was it the content? If they were politicians or heads of government departments they may not have been able to attend, they are not their own masters and a political situation can develop which requires their presence in other areas.

Now, looking to the future, what are the objectives of the next tourism workshop? I'd like you to define your ideas for that workshop right now while the successes or inadequacies of this workshop are clear in your minds. The design of this next workshop must be made by the tourist industry. You must design and develop a seminar which answers the questions you want verified. You are the owners of the tourist industry, you are the developers and sellers of tourism to the Great Barrier Reef Region.

I've been perhaps more forceful than many people in simply closing a workshop. I have reason for this in that I have tremendous faith in this Great Barrier Reef. It's a tremendous natural resource. There is tremendous potential for its utilisation without damage and that responsibility lies equally with all of us, and so in closing this workshop I put that challenge before you.

PETER WAKELING
(Department of Tourism):

Ladies and Gentlemen, I would just like to join with Joe in thanking you for coming. It's marvellous in this day and age to think that the Commonwealth and the State of Queensland can meet together on a happy and co-operative basis. We've found it a rewarding experience working with the people from the Marine Park Authority, we've come to the conclusion that we can work together and that we do have a common interest. I think perhaps that's one of the vital things that's come out of this conference. We're all part of a very big industry, whether we're a scientist, whether we're an operator, whether we're a back-room fellow in the government in Brisbane or Canberra or Townsville. We've all got a common interest and we can all combine our resources for the benefit of everybody.

I personally have found this conference a rewarding experience. I hope all participants have also. We look forward in the years ahead to a long period of co-operation with the Authority and with the industry.

In conclusion I would merely like to hark back to a resolution passed at the beginning of today's proceedings when I was absent, and that resolution made reference to the inability of my Director General and my Minister to attend. Mr Wilson currently is in Korea attending the Pacific Area Travel Association conference. It may have passed notice perhaps that I was sent to represent him, and I hope I've been able to make some contribution to the workshop. Mr Hodges of course, falls into that very difficult political situation. Cabinet was changed. Cabinet met on the day he was supposed to be here. He couldn't come and I know he regrets that. Ladies and Gentlemen with Joe I thank you very much for coming. We hope to see you all in Townsville some time to be appointed next year, and we hope when that time comes around we can look back on a year of real progress in the important job of putting offshore Queensland on the tourist map of the world.