6.0 PROSPECTS AND OPTIONS

6.1 Historical Trends

Before looking to the future of Green Island, it is instructive as a first step towards this task to examine past trends in tourism generally and more particularly at Green Island.

6.1.1 Green Island Visitation

The number of paying passengers on regular ferry services to the island is a good indicator of total visitation and has the advantage of reliable statistics being available from 1960 onwards. The relevant statistics are shown on Table 6.1 and are displayed graphically on Figure 6.1 along with other typical indicators of trends in tourism.

TABLE 6.1
Passengers on Green Island Ferries(a)

YEAR	PASSENGER NOS. (,000)	YEAR	PASSENGER NOS. (,000)
1960	48	1969	88
1961	47	1970	97
1962	57	1971	99
1963	60	1972	99
1964	73	1973	118
1965	75	1974	118
1966	82	1975	130
1967	78	1976	123
1968	83	1977	115
		1978	118

(a) Fare paying passengers on regular services only.
Source: Ferry Operators.

Taking the period 1960 to 1978, visitation to Green Island, as measured by this indicator, has exhibited very strong growth. Visitation increased from a level of about 48,000 passengers in 1960 to some 118,000 passengers in 1978. This is a total increase of 148% and represents an average compound growth rate over the period of 5.6% per annum.

This growth has not occurred uniformly over the period. Some of the irregularity is clearly associated with weather conditions and is not of interest to this study. Of more relevance to the present purposes is the pattern evidenced in recent years. From a peak of some 130,000 passengers in 1975, visitation declined to about 115,000 persons in 1977. Patronage recovered slightly in 1978 but the level is still well below the historic peak. Patronage has recorded a negative trend since 1975 equal to an annual average compound rate of 3.4%.

The comments above relate to fare paying passengers on the regular ferry services. Such figures should not be confused with total visitation to the island. Estimates of the total number of persons currently going to Green Island vary widely. Visitation has been reported to range between a low of 120,000 persons per annum and a high of 180,000 persons per annum. Much of the spread in these estimates appears to stem from the confusing total visitation with passengers and from a lack of a standard definition of visitation.

A satisfactory definition of visitation must include a minimum period of stay on the island. The definition of a 'recreational day' adopted in the Supplement No. 1, U.S. Senate Document 97 (1964) employs "a standard unit of use consisting of a visit by one individual . . . . during any reasonable portion or all of the twenty-four hour period". For the purposes of this study, three hours is taken to be a reasonable portion of a day. Using this period as the standard, visitation is defined here to mean the number of return trips made to the island by persons of all ages whose length of stay on the island during any one trip exceeds three hours.

With this definition, the level of total visitation in 1978 is estimated at about 130,000 to 135,000 persons. This figure has been derived by adding the recorded number of fare paying passengers on regular services to estimates of (a) the non-fare paying passengers on regular services (mostly children 4 years and under), (b) the passengers carried on sea plane services and occasional boat charters, plus (c) the persons using private craft.

Fare paying passengers represent over 90 percent of the estimated total visitation in 1978. Given this importance, it is reasonable to expect that the historic trend in both series would correspond quite closely. Some deviations between the two series would be attributable in the past to calls from large cruise vessels and more recently to the growth in persons using private craft. The growth in small craft ownership will have tended to increase visitation by local residents. Their custom will have been attracted away from the commercial services, with the result that the true decline in total visitation since 1975 may be slightly overstated by the drop in paying passengers. The difference would be expected to be slight and certainly would not by itself constitute a plausible explanation for the apparent reduction in use of Green Island.

6.1.2 Trends in Tourism

Examination of the trends in recreational/tourist activity at other locations serves to put the pattern of visitation to Green Island in perspective.

Unfortunately, the ability to obtain insight into the comparative performance of Green Island is severely restricted by the dearth of statistics on tourism. Research on tourism in Australia is severely hampered by shortcomings in the available data set and the discussion here is subject to a further limitation arising from confidentiality restrictions applying to some information held by the Consultants. Such limited data as is available and able to be reported often suffers from serious deficiencies. The problems arise from inconsistencies in the extent or definitions employed in time series and through limitations in the period covered. Because of these and other problems, care in interpretation is necessary.

The need for caution applies with particular force to the two data sets which provide reasonable geographic coverage. One series deals with accommodation and the other with traffic levels at airports. Each series has been recorded using procedures which make the data amenable to only broad analysis. A further difficulty with both of these sets is that in neither is there a breakdown of the totals according to purposes of travel. Thus, the holiday/recreational component is not separately identified and trends in this component may be masked by developments taking place in other sectors.

Other available data useful as indicators of tourism relates to specific sites or attractions. In this category are statistics on passengers to Kuranda by rail, visits to the observatory on Hook Island, the number of persons calling at Ayers Rock.

Summarised details of the available data able to be reported are presented in Tables 6.2, 6.3 and 6.4. The trend growth rates shown in Tables 6.3 and 6.4 may be compared with those of the number of paying passengers on regular ferries to Green Island. The annual trend growth rates for Green Island by period are 5.6% (1960-78), 3.6% (1969-78), 1.9% (1972-78) and -3.4% (1975-78).

Examination of all the statistics shows that some of the trend indicators yield apparently inconsistent results while in other instances the data is not sufficient to allow firm conclusions to be drawn. Even so a number of observations of importance to the study can be made.

TABLE 6.2
Accommodation Takings

STATISTICAL DIVISION	GROWTH IN TAKINGS [a] 1973/74-1978 (%)
Far Northern (Cairns)	108.3
Fitzroy	115.0
Northern (Townsville)	30.9
Mackay	96.5
Moreton	139.7
Queensland	185.9
Australia	159.3

(a)Covering hotels, motels and caravan parks.

Source: ABS.