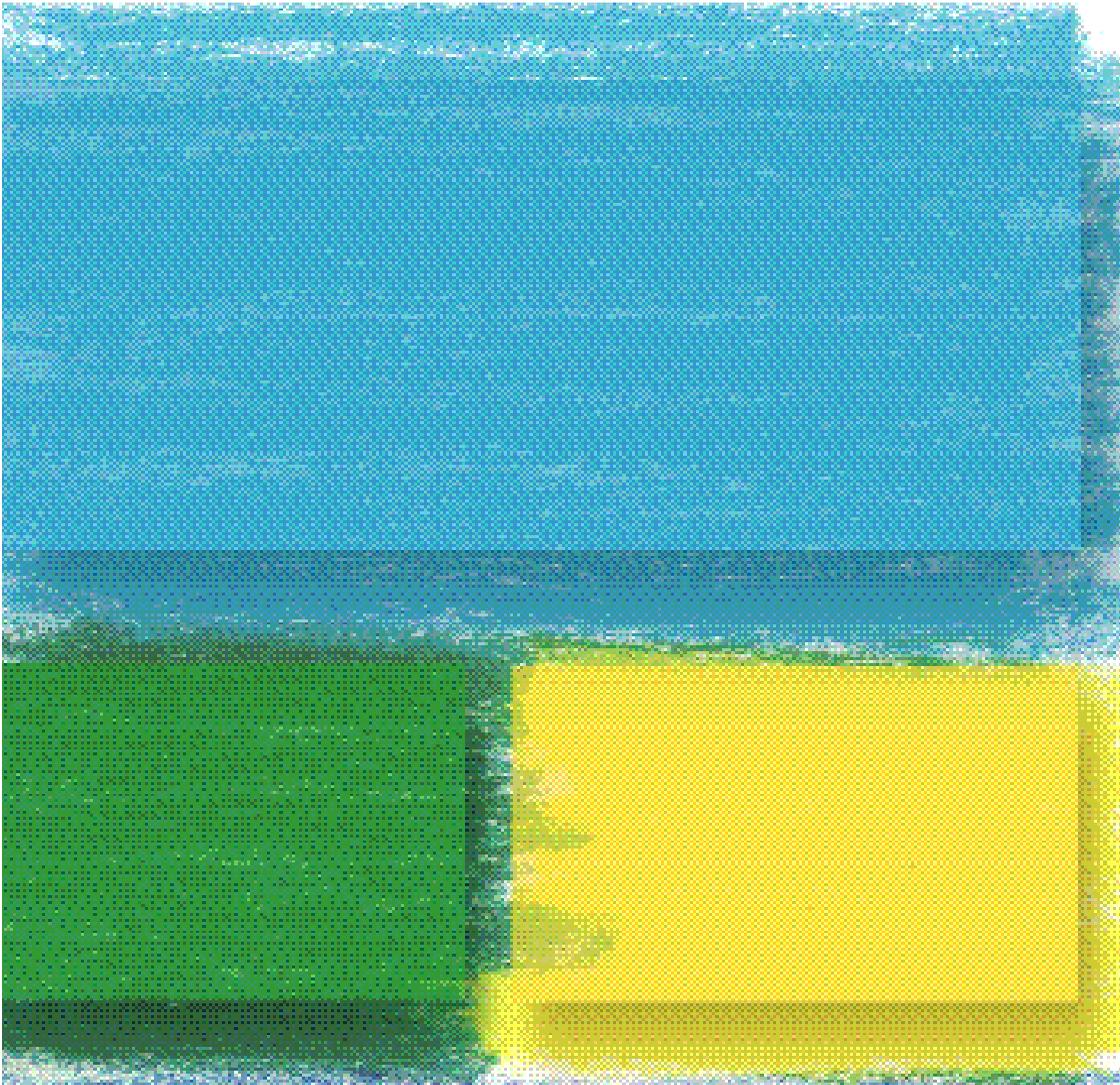


Jan Warnken

TOURIST FACILITIES AND INFRASTRUCTURE AUDIT



Tourist Facilities and Infrastructure Audit

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Tourist Facilities and Infrastructure Audit

Gold Coast Tourism Visioning Project 2.2

Jan Warnken



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Executive Summary

Accommodation, transport and recreation facilities are key components of a major tourism destination. The competitiveness of these facilities at a national or international scale determines whether they become valuable assets for, or likely impediments to, attracting visitors to a destination. Plans for improving the overall attraction of a destination need to be based on detailed information highlighting the current state of such infrastructure. Therefore the objectives of this study were to:

1. Identify and map (georeference) all currently existing accommodation businesses (hotels, motels, backpackers, caravan parks, self-contained units), theme parks, nightclubs, golf courses, tour operators, vehicle hire businesses, etc. in the Gold Coast area.
2. Characterise each business by type, age, recreation/entertainment facilities (e.g. pool, tennis court, rides, shows, bar etc.) visitor capacity, address, phone, and refurbishment initiatives.
3. Compile collected data in interactive, multi-attribute MapInfo GIS layers (one layer per tourism business category).
4. Compile thematic maps of tourism opportunity spectra and maps detailing densities of types of accommodation units based on suburbs, selected areas or individual land parcels.

Results

1. Accommodation Facilities in General

More than 400 accommodation providers were identified, mapped and interviewed. By the end of 1999, the Gold Coast offered almost any type of accommodation: from purpose built island resorts to family run eco-resorts situated in or close to National Parks, from old small hotels to brand new 35 storey condominium complexes. Based on figures from the Australian Bureau of Statistics (ABS) and data from this study, the overall largest number of beds were found in condominium complexes, followed by beds in serviced rooms of

hotels and, most likely, bed spaces in caravan parks (exact figures for caravan parks could not be collected, estimates were based on tent spaces and van sites).

More than 88% of all accommodation providers were located close to beaches along the ocean and the Broadwater. This proportion was even higher for tourist condominium complexes: only 9 out of 300 (3%) were located away from the main coastal and Broadwater strips. Occupancy rates from ABS data however indicated that on average these facilities were used to only 50% of their maximum capacity.

‘Main Beach’ and ‘Broadbeach’ were the areas with the most intensive development activities in recent years. Other building activities of the mid to late 1990s concentrated in older areas such as Coolangatta or Southport/Labrador.

2. Critical Issues of Accommodation Facilities

Old or outdated accommodation facilities can reduce the attractiveness of a destination against competitors with more modern infrastructure. The accumulation of older buildings can become a problem for the whole destination or at least a considerable part of it where: (a) technical or economic reasons impede replacement or extensive refurbishment of these buildings, and (b) many buildings of the same type and age dominate one area. Large-scale development booms are the most likely times for such accumulation of buildings. The Gold Coast had several of these booms. The most pronounced ones occurred during the early 1980’s followed by a second phase of intensive development activity in the late 1980s, early 1990s. Accommodation facilities that pose problems in regard to their replacement are high-rise condominiums. Many of them are owned by almost as many parties as there are apartments, and their residential density, i.e. the number of beds per area, is high which translates into high land values.

Two areas with such critical infrastructure were identified: a relatively small one to the north and a much larger area to the south of the Surfer Paradise core. Further research is needed to investigate which sectors of the domestic and international markets consider accommodation in modern buildings important, and how price and demand of refurbished apartments compare to modern apartments.

3. Golf Courses

Golf has become an integral part of the tourism product, particularly for the higher end of the market. Golf facilities are therefore critical assets for a major destination. By the end of 1999, 28 golf courses were operating within the boundaries of Gold Coast City Council. They ranged from 9-hole short courses to 36-hole international golf resorts including facilities such as hotels, restaurants and fitness clubs. Most were developed between 1985 and 1994. Data from several major courses indicated that these were running below their maximum capacities. With two new courses almost finished and other facilities located just beyond Council's boundaries, there seems little reason for promoting further golf development as a means to increase the attractiveness of the destination 'Gold Coast'.

4. Beaches and Waterways

Most of the area's beaches and waterways are well utilised and firmly incorporated as a central theme of the destination 'Gold Coast'. These areas are probably of equal value for tourists and residents alike and used by both groups equally frequently. In 1999, supervised swimming areas were provided at 22 surf life saving clubs and another 16 stand-alone surf-life saving towers. The key issue remains with car parking spaces along swimming beaches: popular places such as Main Beach, Broadbeach or Burleigh Heads fill up very quickly on weekends. Further investigations are needed in regard to visitor satisfaction and the lack of car parking, particularly against a likely increase of the problem resulting from the effects of the new 8-lane highway between Brisbane and the Gold Coast.

The second issue of concern and likely conflicts between tourist operators and residents relates to increasing traffic congestion on the area's waterways, particularly the section between the Southport-Main Beach Bridge and the seaway. This area has the highest vessel activity in south-east Queensland according to vessel counts recorded by Queensland Transport, Maritime Division.

5. Transport and Traffic

General issues with motor vehicle traffic were highlighted and addressed by the *Integrated Regional Transport Plan* (IRTP 1998)

under the *Regional Framework for Growth Management (RFGM 1995)* (and the *Gold Coast City Transport Plan (September 1998)*). From a tourism destination point of view the biggest issue remains with using private vehicles for transport. Both tourists and residents use the same roads and traffic congestion increases markedly on the beach sections of the Gold Coast highway during peak seasons (school holidays: January, Easter, September; ‘Schoolies’ week’, and the ‘Indy’). Current perceptions of visitors and residents in regard to existing and future traffic situations need further investigation, with particular reference to the likely effects of the new eight-lane highway between Brisbane and the Gold Coast.

Public transport for tourists was relatively well developed: most accommodation facilities were situated along the beach strip, which was also well served by the public bus transport system and coaches. The latter also provided a well established link between both regional airports (Coolangatta, Brisbane).

6. Theme and Wildlife Parks

The Gold Coast hosts the greatest variety of theme and wildlife parks in Australia. For a long time, their presence had, and still has, a major impact on the image of the destination ‘Gold Coast’. The area’s latest major facility, ‘Movieworld’, was added eight years ago, but even older theme parks have been continuously updated with new rides, shows and displays. An important issue for the attractiveness of the destination as a whole is the question how Gold Coast theme parks compare with international competitors. An answer to this question was well beyond this study.

7. Shopping Facilities

The Gold Coast provides a large number and variety of shopping facilities for domestic and international visitors. Special tourist shops were mostly contained in shopping centres within the main tourist strip, i.e. the strip along the area’s ocean beaches, or along sections of the Gold Coast Highway in Central Surfers Paradise. Most of these facilities were built during the development booms of the early and late 1980s. Although owners of tourist shops upgraded the interior and, to some extent, the façade of their shops continuously, the principle design and architecture of most shopping centres remained.

As for condominium accommodation, further research is needed to determine how important modern shopping centre design and architecture is for maintaining a competitive edge in domestic and international tourism markets. Shopping centres, however, have the fundamental advantage that in most cases a single company or a small group of investors owns the land and the buildings.

1. Introduction

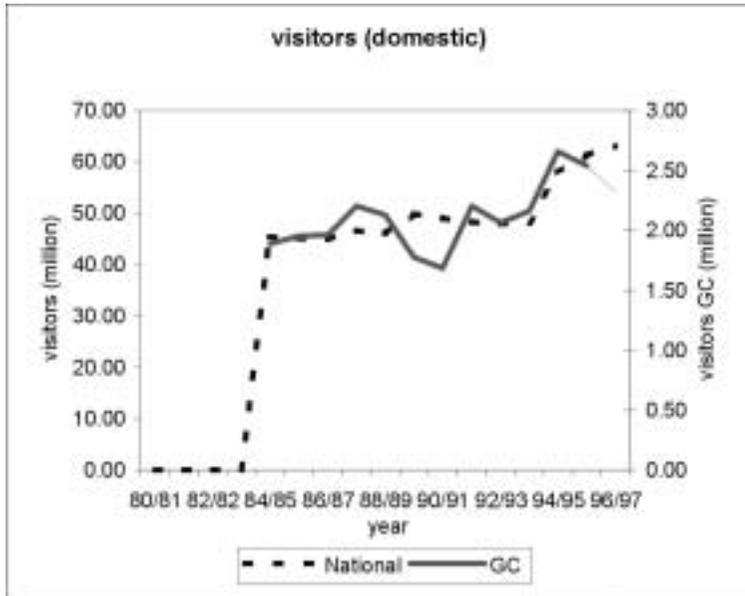
1.1 Background

Tourism, if left to develop without any effective planning framework and only regulated by market forces, generates impacts that can severely diminish its own resource base (OECD 1980, Mathieson and Wall 1982). In particular, mass tourism and its major destinations have been identified as threats to exactly those natural and cultural assets that attracted visitors in the first place (Butler 1991). Such unsustainable development not only violates principles set out under the Rio Convention on Sustainable Development (1992), it also compromises revenues and job opportunities for local communities and, ultimately, threatens to impact on foreign currency earnings. Even before 1992, i.e. before the formal adoption of the concept of sustainable development, several attempts were made to define models which help explain the dynamics of tourist destination development and which in turn could provide assistance for decision-makers when trying to prevent mistakes of the past (e.g. Gilbert 1939, Butler 1980, Strapp 1988, Weaver 1990, Smith 1992, Prideaux 1998). Most of these models acknowledge that destinations evolve in stages, which include phases of exploration, development, and finally saturation. Although stagnation or deterioration can occur at almost any stage, the majority of cases with signs of saturation, stagnation or even decline were large, mature destinations (Butler 1980, Cooper and Jackson 1989, Morgan 1991, Smith 1991, Getz 1992, Williams 1993).

1.2 The Gold Coast

For several decades now, the Gold Coast has been one of Australia's major domestic and international tourist destinations. The area's major attractions are its sandy surf beaches, a pleasant subtropical climate, a mountainous green hinterland containing subtropical rainforests within an hours drive from the beach, and several major man-made attractions such as theme parks, golf courses and major international resorts. The area is one of Australia's fastest growing resort cities with annual increases in resident population of 6.3% to 3.8% in 1986–1990

and 1997, respectively (GCCC 1997). The majority of visitors are domestic tourists (Figure 1). Over the past decade, their numbers oscillated around the 2.2 million mark with some indications of a small general increase. Growth in the international market has been continuous but annual growth rates are declining (Figure 2). This trend towards saturation and a growing concern in the local community about the future of the destination's core area, Surfers Paradise, implies that the destination 'Gold Coast' is at a crossroads and could be losing its competitiveness in both, the national and international markets.



(data taken from the BTR visitor survey)

Figure 1
Annual Domestic Visitor Numbers to Queensland (National) and the Gold Coast (GC)



(data taken from the BTR visitor survey)

Figure 2

Annual Short Term Arrivals of International Visitors to Queensland (National) and the Gold Coast (GC)

For both tourism planners as well as local decision-makers, the situation raises several questions. Firstly, the trend in tourist numbers, particularly those for international visitors, could be caused by factors external to the tourism industry, e.g. political and general economical instabilities in the South East Asia region. Alternatively, changes in visitor numbers may be reflecting a change in the overall attractiveness and competitiveness of the destination. If these data do indicate that the Gold Coast is in fact gradually losing its competitiveness, then what are the processes that affect its assets and how are these comparing with other international destinations in the region?

1.3 Working Hypothesis

As mentioned above, the emergence of larger tourist destinations and recognition of their inherent potential to create their own downturn prompted tourism researchers to develop models or conceptual frameworks that help to explain the evolution, or set course of development, of a tourist destination over time (e.g. Gilbert 1939, Butler 1980, Strapp 1988, Weaver 1990, Getz 1992, Smith 1992, Prideaux 1998). Most of these models were descriptive or largely generalised, and based mostly on visitor statistics. They can only be used in hindsight to check whether sequences of development and events in the past match predicted sequences of a model. This left little opportunity to operationalise these models (Haywood 1986, Getz 1992, Prosser 1995, Warnken and Russell 1998), i.e. to apply them in practice and determine the current status of a destination or even identify its most likely next stage or phase.

However, almost all models mention socio-cultural or socio-economic changes as the ultimate result of tourism development. If these changes lead to a disruption of social networks in the host community or if changes exceed environmental carrying capacities, regardless of how these may be defined, they can result in disharmony or conflict between residents and tourists. Ultimately, this can reduce attractiveness and trigger a downturn in the destination's overall competitiveness in the national and/or international markets.

In many cases, particularly in 'old world' countries, tourist numbers and their holiday expectations change much faster than the number of residents and their socio-cultural background (e.g. small fishing ports in southern Europe or mountain communities in Nepal, the Andes or the European Alps). Therefore, it is often the type and quantity of tourists, which trigger changes in the relationship between tourists and residents. Most researchers also agree that certain site-specific assets such as a pleasant local climate, environmental settings (e.g. a beach or a mountain) or a historic monument initially provide the reason for an area to be discovered as a destination. The more assets a destination has to offer, the more attractive it will be (and the more likely its early discovery will be). Apart from the rare event of a natural or human induced disaster, it is also unlikely that these initial assets are being degraded in a short period of time. Factors, which can bring about rapid changes to a destination's attractiveness, relate to an increase in tourist numbers and the then necessary upgrades to man-

made infrastructure. Depending on their type, upgrades to man-made facilities can result in:

- better access through improved transport links (roads, railway, airports) or improved transport technology (modern long distance jet airliners, high-speed trains);
- more sophisticated accommodation and tourist service infrastructure (hotels, resorts, restaurants, tourism bureaus, duty free shopping, etc.);
- better recreation and entertainment opportunities (night clubs, golf courses, theme parks, casinos, shows, etc.); and
- a basis for developing or organising special short term events (sports competitions, rock concerts, festivals, exhibitions, races).

Improvements in each of these categories increase the overall recreation/entertainment opportunity spectrum of a destination and, consequently, increase the chances of further altering the destination's visitor demographics.

Furthermore, major man-made infrastructure requires considerable capital investment and, once built, remains in place for some time. Therefore, facilities of the type listed above also reveal spatial and temporal dynamics, e.g. shifts from one tourism node to another within the same destination, or general shifts in the recreation preferences of tourists. Thirdly, it is much easier to change a destination's course of development by adding or removing man-made attractions than by trying to add further natural attractions like, for example, artificial reefs which take years to establish.

It is therefore quite legitimate to assume that a destination's existing, i.e. currently used, infrastructure reflects past and current trends in visitor demographics. It is equally reasonable to assume that existing infrastructure, if left to deteriorate or if combined with major new developments, can have a major impact on a destination's future visitor population.

Irrespective of whether destinations are examined for compliance with resort development frameworks or whether destinations are analysed for a marketing exercise, it is pivotal to the success of these investigations to include an assessment of their existing man-made infrastructure.

Any transport, recreation or accommodation facility used by tourists provides some information about tourist activity patterns. Trying to collect detailed information for all facilities used by tourists would be beyond the scope of almost any study. Therefore, for the

purpose of this report, emphasis is placed on major facilities, i.e. any type of tourist accommodation, theme parks, golf courses, relevant transport nodes, and major recreational infrastructure (e.g. guarded beach areas).

2. Methodology

2.1 Categories

Definitions for terms such as ‘resort’ (King and Whitelaw 1992), ‘hotel’, ‘theme park’, etc. are often ambiguous: they differ depending on the type of user and the context in which they have been used. Therefore, in a first step, categories for various tourism infrastructure facilities were defined to allow further comparison with other studies. A special category had to be created for old or small hotels, which rarely offered more than 25 serviced rooms. Almost all of these ‘old hotel’ facilities were operated in association with bottle shops, which were believed to generate the major income – rather than tourism.

2.1.1 Accommodation providers

- Hotels = premises which provided >50 serviced rooms, were licensed to sell alcoholic beverages, and had a formal reception area and a food outlet, i.e. a restaurant or similar facilities.
- Motels = premises which provided serviced rooms, were not licensed to sell alcoholic beverages, and had no formal reception area/lounge.
- Condominium/self-contained flats = premises which provided apartments with a fully equipped kitchen, living room area, but without any cleaning services to bathroom and bedrooms included in regular rates.
- Caravan parks = premises which provided designated spaces for tents and caravans.
- Backpackers/bed & breakfast = premises where guests had to share bedroom or bathroom facilities with either other guests (backpacker) or share bathroom or dining facilities with their hosts (bed & breakfast).
- Miscellaneous = any premises that did not fit into any of the above categories.
- Old hotels = premises named ‘hotel’, which had a bottle shop attached and which, if serviced room accommodation was provided, did not exceed 50 rooms.

In cases where several types of accommodation were provided on the same premises, the most dominant type was used for classification.

2.1.2 Golf Courses

Initially, all golf facilities were considered in order to provide an overview over the entire golf opportunity spectrum on the Gold Coast – irrespective of whether they were listed by the Australian Golf Union (AGU) or not. Minor 9-hole short courses (i.e. par three) and driving ranges were later excluded from this analysis as their small areas leads them to resemble parks and sporting grounds rather than golf facilities for tourists.

2.1.3 Theme and Tourist Parks

Only those premises within the Gold Coast City Council boundaries which contained several buildings (i.e. major infrastructure) and provided displays, rides and shows for their guests were considered as theme and tourist parks.

2.1.4 Traffic Nodes

Consultation with local transport authorities and tour bus operators revealed that regular pick-up and set-down of tourists occurred at airport terminals, interstate bus transfer terminals, tour boat berths and major theme parks. Major railway stations were also included because of their potential for providing day-tripper access for visitors from the Greater Brisbane area.

2.1.5 Dive Sites, Water Sports and Supervised Swimming Areas Along Surf Beaches

Dive sites used by tourists were identified by contacting commercial dive tour operators on the Gold Coast and inquiring about regularly used dive spots. Water sports areas were identified based on personal observation over eight years (J. Warnken) and information obtained from Queensland Transport, Maritime Division. The presence of physical structures such as surf life saving towers and clubhouses were used as indicators for regular supervision by trained surf life saving crews and therefore included in this study.

2.1.6 Shopping Centres for Tourists

Agglomerations of shops were only considered ‘shopping centres’ if they were managed by a central management body. Management personnel were then interviewed by telephone to investigate whether shopping facilities were used by tourists on a regular basis. Based on these interviews and on personal observations over 8 years (J. Warnken), two subsets of facilities were identified: shopping centres, which were used primarily by tourists, and shopping facilities that were used by tourists and residents alike.

2.2 Mapping of Major Infrastructure Facilities

2.2.1 Accommodation Providers

Initial investigations revealed that no comprehensive list of accommodation providers existed for the Gold Coast area. Therefore, premises offering accommodation for tourists were identified in the field by signs and notice boards advertising vacant rooms or condominiums. Exact locations of these premises were captured by retracing relevant land parcels on a digitised map version of the area’s 1996 cadastral database provided by the local council, i.e. GCCC. Information about ‘old hotels’ was stored as point data rather than polygons.

2.2.2 Golf courses

Land parcels containing golf courses were initially identified by comparing aerial photographs with the polygon network on Council’s digital cadastral database (DCDB). The exact locations of golf facilities were then verified by extensive ground truthing and comparison with Council’s planning schemes, i.e. the 1995 Albert Shire Plan and the 1994 Gold Coast City Council Plan.

2.2.3 Theme Parks

The location of theme parks was captured as for golf courses.

2.2.4 Tourist Traffic Nodes

All locations of traffic nodes were captured from the 1992 Gold Coast street network data (bus terminals), the digital cadastral data base (railway stations) and 1994 1:25000 topographic image maps (bus terminals, airport terminals) purchased from the Department of Natural Resources.

2.2.5 Supervised Swimming Beaches and Water Sports Areas

Dive site locations were entered into GIS map layers as point data based on Wright (1990) and details provided by operators. Water sports areas were mapped using digitised maps of the Gold Coast waterways and Council's Nature Conservation Strategy (GCCC 1998). The latter was used to identify areas exposed at low tide.

Since all surf life saving clubhouses also had guard towers, the position of these towers were used to map 200m sections of beach, i.e. 100m north and 100m south of the tower, as the likely area to be used by visitors who come to the beach for swimming and sun baking.

2.2.6 Shopping Centres

The location of shopping centres was captured as for golf courses.

In general, field investigations focused on the region's major tourist areas. Facilities in, and north of, Beenleigh, a town at the northern part of the GCCC district, were not included.

2.3 Collection of Attribute Information

2.3.1 Accommodation Providers

Every business identified in the field was contacted by phone to provide information about its premises:

- the year the building(s) were opened/became operational,
- the number of storeys and accommodation units (serviced rooms, self contained apartments, camping sites, beds),
- the number of units occupied by permanent residents (apartments),

- associated facilities (restaurants, pool, sauna, tennis courts, golf, childcare),
- any recent refurbishment, and
- star ratings (where available).

In some cases, operators and even owners were unable to provide reliable information about the age of their buildings. For some of these buildings, their style, design and building materials were used to identify the era in which they would have been constructed.

2.3.2 Golf Courses

Golf course managers were interviewed by telephone or in person to obtain information about their courses, i.e. type of ownership, membership fees, total tee times per month, etc. Existing course ratings by the Australian Golf Union (AGU) also were used to classify golf facilities and to allow for comparison between different levels of playing standards. Finally, data from the Gold Coast Tourism Bureau/Griffith University Golf Monitor (Centre for Tourism Research, Griffith University, unpublished) were analysed for occupancy rates of major golf courses.

2.3.3 Theme Parks

Attribute information for theme parks was collected from relevant Internet sites, fact sheets provided by theme park operators and telephone interviews with management staff.

2.3.4 Tourist Traffic Nodes

No further attribute data were collocated for these facilities. Comments in regard to traffic congestion were based on personal observations while living and working in the area for more than seven years.

2.3.5 Supervised Swimming Beaches

Each SLS tower and clubhouse and their surrounding areas were investigated for provision of publicly available showers, toilets, food outlets, and car parking spaces.

2.3.6 Shopping Centres

In the context of this study, attributes collected for shopping centres were the year when the facilities were first opened for business, the approximate number of shops (not offices) for each facility, and the year of major extensions or refurbishment to the centre itself. Where senior management staff was willing to provide more details, information about shop floor spaces, parking spaces and annual turnovers was also noted.

2.4 Data Analysis

Data collected for accommodation providers were compared against tourist accommodation statistics published by the Australian Bureau of Statistics (ABS series 8635.5). All digital spatial data were analysed using MapInfo Professional GIS software. Compilation of aggregate data and statistical analyses were performed by using SPSS 8.0 statistics software.

Time lines were compiled for periods of five to 20 years. Data points for summary statistics for these time lines were plotted showing the middle value for the upper and lower boundaries.

3. Results and Discussion

3.1 Accommodation

Overall, 450 premises with tourist accommodation facilities were identified in the field. Of these, 447 could be categorised into types listed under 2.1. Premises with missing attribute information were either still under construction or subject to closure and operators refused to answer questions.

Of all accommodation premises, 66 per cent (298 of 450) offered condominiums or self contained flats – the latter term most frequently used by local operators. In terms of overall numbers of ‘accommodation units’ (i.e. serviced rooms, condominiums, caravan sites, etc.) the most prominent types of accommodation were, in descending order, condominiums (9759), serviced rooms in major hotels (6796), sites and cabins in caravan parks (>3323), serviced rooms in motels (>1627), and 345 rooms for backpacker and B&B providers (Table 1).

Table 1
Accommodation Premises, Units and Beds for Queensland and the Gold Coast

Accommodation type and survey	Premises	Units	Beds	Beds/unit	Occupancy	Area (ha) ¹
Hotels						
This study	24	6796	21747 ²	n.a.	n.a.	109
GCCC, ABS 1997*	22	5636	18046	3.2	66.7	n.a.
GCCC, ABS 1999	24	6282	20223	3.2	60.4	n.a.
Queensland, ABS 1999*	173	20812	64560	3.1	57.6	n.a.
GCCC/Queensland, ABS 1997*	0.09	0.26	0.28	–	–	–
Motels						
This study	69	> 1627–	5206 ²	n.a.	n.a.	18
GCCC, ABS 1997*	7	068	875	.2	7.7	.a.
GCCC, ABS 1999	6	080	285	.0	9.2	.a.
Queensland, ABS 1999	11	8234	4729	.0	3.0	.a.
GCCC/Queensland, ABS 1997*	.10	.13	.13			
CONDOMINIUMS						

Accommodation and survey	type	Premises	Units	Beds	Beds/unit	Occupancy	Area (ha)¹
This study			9759	37084 ²	n.a.	n.a.	101
		00#					
GCCC, ABS 1997*		286	9452	36190	3.8	60.6	n.a.
Queensland, ABS 1997*		732	20322	83414	4.1	58.2	n.a.
GCCC/Queensland, ABS 1997*		0.39	0.47	0.43	–	–	–
CARAVAN PARKS							
This study		25	> 3323-	n.a.	n.a.	n.a.	96
BACKPACKERS, B&B							
This study		27	345	n.a.	n.a.	n.a.	187

NOTE: 1 = total area of all premises in each category; 2 = based on beds/unit ratios obtained for ABS (ser. no. 8635.3) survey; * data are averages based on all four quarterly reports for the 1997 calendar year (ABS report series 8635.3); # includes buildings currently under construction; - several managers refused to provide relevant information.

With regard to averages calculated for the last four published quarterly reports in the ABS tourist accommodation survey (1997, ABS ser. no. 3835.3), the numbers of hotel rooms for this study were substantially higher while motels were almost 45 per cent lower (Table 1). Despite a small number of additional condominium premises, the overall number of apartments was slightly lower than for 1997. Because of the inclusion of mobile home parks into the ABS survey and differences in definitions of categories, comparisons between the two studies for caravan parks and backpackers were not possible and therefore, not provided.

The generally smaller numbers in this study (compared to ABS figures), could be explained by differences in the actual area investigated. Firstly, the ABS survey amalgamates data from Statistical Local Areas (SLAs), which sometimes straddle the boundary between local government districts. Secondly, the infrastructure audit focused on the main tourist areas on the Gold Coast, i.e. areas along the district's beaches and the immediate hinterland. As mentioned under 2.4, accommodation providers in Beenleigh, a township close to the north-western corner of the GCCC area, were not included as their location close to another urban centre, i.e. Logan City, leads them to become part of a distinctly different node.

Based on the ABS survey data, the average ratios of beds per accommodation units are 3.8 beds/unit for condominiums and 3.2 beds/serviced room in hotels or motels. Consequently, the gap between beds in condominiums and serviced rooms increased to

almost one fifth, i.e. ~ 37,000 beds and ~ 27,000 beds, respectively (Table 1).

According to ABS data, the Gold Coast itself contained almost 50 per cent of all condominium beds in Queensland, but only 40 per cent of those buildings that offer such accommodation. For hotels, these figures were even more extreme: almost one third of all hotel beds in Queensland were located on the Gold Coast – in only 10 per cent of the State’s hotel premises. Such higher numbers of beds per accommodation premise clearly reflect a generally higher density, i.e. number of accommodation units per facility, on the Gold Coast.

3.1.1 Facilities Associated with Accommodation Premises

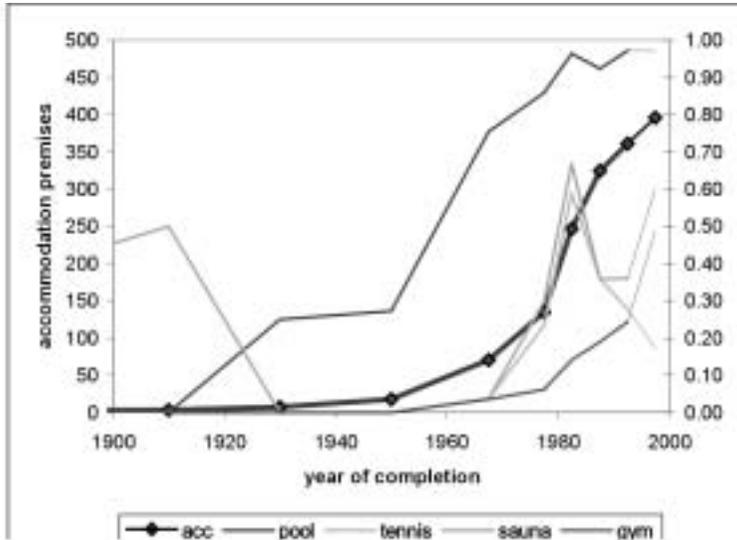
The major type of recreational facilities associated with tourist accommodation premises were outdoor swimming pools, tennis courts, saunas, and gymnasiums or fitness centres. Only few providers had none of these facilities (12 per cent or 51 out of 407). However, this was most pronounced for caravan parks, backpackers and B&B providers (Table 2). Almost all hotels and condominium premises included a swimming pool, while fewer had additional facilities such as saunas and tennis courts.

Table 2
Recreation Facilities Associated with Accommodation Facilities

Type of accommodation	Total	No		Pool		Sauna		Tennis courts		Gymnasium	
		data	No.	%	No.	%	No.	%	No.	%	
Hotels	24	1	23	1.00	18	0.78	17	0.74	19	0.83	
Motel	69	7	46	0.73	2	0.03	2	0.03	1	0.02	
Condominiums	300	25	261	0.95	133	0.48	103	0.37	45	0.16	
Caravan parks	25	3	12	0.55	0	0.00	2	0.09	0	0.00	
Backpackers, B&B	27	5	9	0.41	6	0.27	4	0.18	3	0.14	
Others	3	0	3	1.00	3	1.00	1	0.33	0	0.00	
Average	n.a.	n.a.	n.a.	0.66	n.a.	0.36	n.a.	0.24	n.a.	0.15	
Total	448	41	354	n.a.	162	n.a.	129	n.a.	68	n.a.	

In terms of building age and the likelihood of providing infrastructure for recreational activities for clients within the premises, older buildings were less likely to be fitted with swimming pools, tennis courts or gyms. The only exemptions were a few very old premises that were retro-fitted with saunas (Figure 3). Swimming pools were almost standard for buildings constructed since the 1970s,

while tennis courts and saunas appeared to be fashionable assets for buildings of the early 1980s boom. This trend seemed to have ceased in the 1990s, at least for tennis courts. The provision of gym facilities, on the other hand, increased during the 1990s – probably as a reflection of the more exercise-oriented life style of holiday seekers at that time.



Acc = existing accommodation premises on the Gold Coast

Figure 3

In-house Recreation Facilities for Major Accommodation Providers by Period of Construction

3.1.2 Development Over Time

The Gold Coast is Australia's largest tourist destination after Sydney and the only city of this size built primarily for tourism and tourism related services. In terms of its infrastructure and the tourism market in general, the trends and dynamics of such an area are likely to differ from other areas in Australia. These trends need to be taken into

account even when analysing the present situation and its potential for future development.

The Australian Bureau of Statistics (ABS) has been collecting tourist accommodation statistics since 1984. These data were used to compare time lines derived from data collected for this study with data from the ABS accommodation statistics. Although collected in a similar format, the ABS, when summarising the data for its quarterly reports, introduced a few changes, which have to be taken into consideration when comparing the results from the two surveys:

- with changing the format of the reports on two occasions (i.e. 1989 and 1994), amalgamation of collection districts (Statistical Local Areas, SLAs) to local government districts was changed for a few SLAs straddling the border between Albert Shire, GCCC and Beaudesert Shire;
- the amalgamation of GCCC and Albert Shire in 1995 resulted in a single larger local government district; and
- more recently, i.e. some time after 1997, the ABS changed its accommodation census to an accommodation survey for selected small local areas and excluded establishments with less than 15 units (serviced rooms or condominiums).

Unless indicated elsewhere, data presented in the following sections were taken from the March quarterly reports of the ABS Tourist Accommodation series no. 8635.3 for the Statistical Subdivision (SSD) 'Gold Coast' including the suburbs of:

- Biggera Waters
- Broadbeach
- Burleigh Heads
- Coolangatta
- Currumbin
- Labrador
- Main Beach-Broadwater
- Mermaid Beach
- Miami
- Palm Beach
- Surfers Paradise
- Tugun
- 'Remainder' of the local government area.

The March quarter was chosen because it covered the peak holiday months for this destination, January and February. Comparisons could only be made for hotels, motels and self contained flats – the only

types of accommodation establishments with consistent data over several consecutive years.

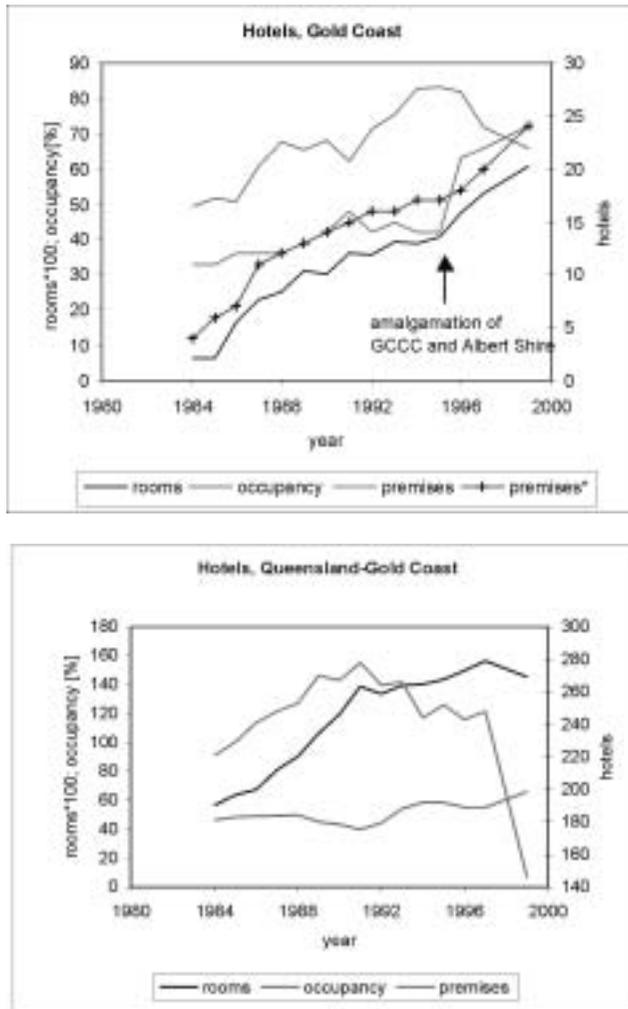
Hotels

Figure 4 illustrates trends in hotel developments on the Gold Coast and the remainder of Queensland.

On the Gold Coast as well as in the remainder of Queensland the number of hotels increased at relatively steady rates until 1990 (Figure 4). After that, only the rest of Queensland experienced a stage where more hotels were closed than new facilities were opened (ABS data). This, however, had little effect on the overall numbers of serviced rooms available in hotels: in both areas, these increased even during the 1990s, though at lower rates than previously. Even more so on the Gold Coast where the situation recuperated during the second half of the 1990s when a small boom helped to increase the numbers of hotels by one third, i.e. from 18 to 24 (this study), and the numbers of serviced rooms by almost the same factor (ABS data).

The likely reason for these diverging trends is best highlighted when comparing figures for 1997 onwards against previous years. After 1997, the ABS data only included hotels offering more than 15 serviced rooms. As a result, the numbers of hotels in the remainder of Queensland dropped from 248 to only 146 establishments (59 percent). On the Gold Coast, however, the number of hotels still increased from 22 to 24 (ABS data). This, and the fact that serviced rooms in the remainder of Queensland only showed a seven percent reduction in total numbers, i.e. from 156,400 to 145,300, strongly suggest that:

- smaller and, most likely, older facilities were replaced with larger complexes holding far more than 15 rooms per establishment, thereby changing the number of units per hotel from 26 (1984) to 63 (1997) and then 99 (1999) in Queensland, and from 58 (1984) to 241 (1997) and 254 (1999) on the Gold Coast; and
- this trend was much stronger and almost near completion on the Gold Coast.



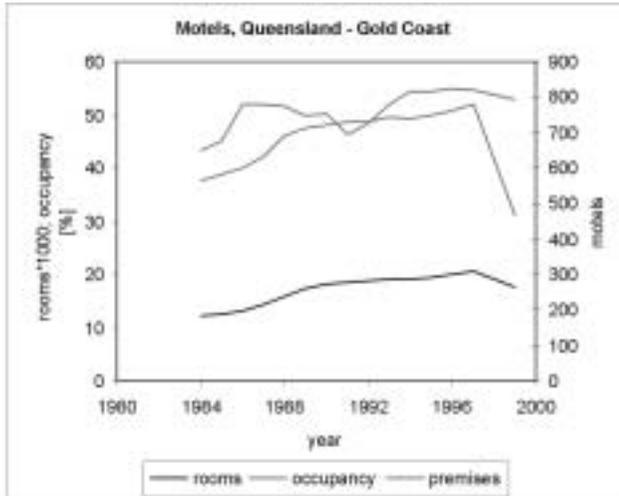
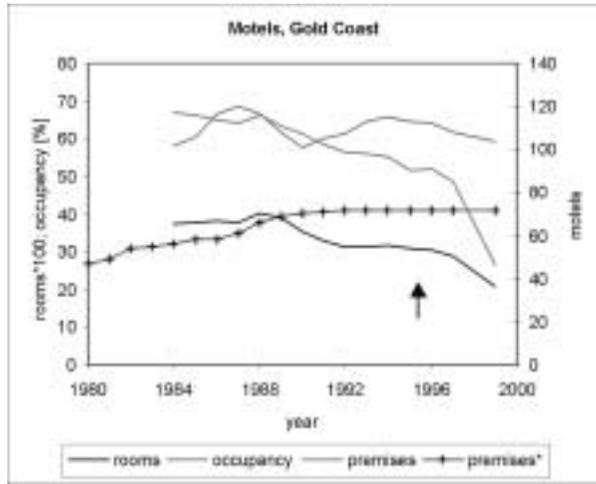
For 1984 to 1997, data were taken from ABS reports (ser. no. 8635.3) for each March quarter. Data for 1999 were obtained from a special ABS service report (ser. no. 8365.3.40.001) for September 1999; * annual numbers of hotels calculated from opening dates for currently existing premises (this study).

Figure 4
Annual Figures for Total Rooms, Total Premises and Occupancy Rates in Hotels in the Remainder of Queensland and on the Gold Coast, 1980 to 1999, Inclusive

Both, the ABS statistics and data from this survey (which used a separate category for small hotels), indicated that small hotels were outdated, had lost their attractiveness, and became next to irrelevant as accommodation facilities in the hotel sector of a maturing destination. This was further supported by observations during this study. Most premises for smaller hotels were either much older than hotels with more than 15 rooms, or built as small parts of other complexes. In both cases, the main intention was to maintain the names and licenses of previous facilities in order to operate a bar and a bottle shop, where revenues from the sale of alcohol surpass earnings from providing accommodation by an order of magnitude.

M o t e l s

The difference between the Gold Coast and the remainder of Queensland is further elucidated by changes to motel-style accommodation facilities (Figure 5). Over the past 15 years, motel-type premises and serviced rooms in motels increased steadily in the remainder of Queensland. On the Gold Coast, however, numbers of motels and serviced rooms in motels were, on average, in decline (ABS data). The only exception was 1988, the year of the bicentennial celebrations for the landing of the First Fleet in Botany Bay, Sydney. As a consequence, this survey found little to no development activities in the motel sector on the Gold Coast, especially for the period after 1992 (Figure 5). Furthermore, annual numbers of serviced rooms in motels on the Gold Coast stagnated after 1991 while the numbers of motel facilities were still in decline (ABS data).



For 1984 to 1997, data were taken from ABS reports (ser. no. 8635.3) for each March quarter. Data for 1999 were obtained (a) from a special ABS service report (ser. no. 8365.3.40.001) for September 1999 or (b) this study; * annual figures calculated from opening dates for currently existing premises.

Figure 5

Annual Figures for Total Rooms, Total Premises and Occupancy Rates in Motels in the Remainder of Queensland and on the Gold Coast, 1980 to 1999, Inclusive

On the other hand, and in contrast to hotels, the number of motel-style accommodation businesses decreased to similar extents on the Gold Coast and in the remainder of Queensland after establishments with less than 15 rooms were excluded for ABS surveys for 1998 and 1999. For both areas, i.e. Queensland and the Gold Coast, this reduction was less pronounced for the numbers of rooms offered in this type of facility. There were also few differences between the Gold Coast and the rest of Queensland in terms of the average units per motel. In 1984, numbers started with 31 units per motel for the Gold Coast and 26 for the rest of Queensland, and increased to 34 (1997) and 45 (1999), and 27 (1997) and 35 (1999), respectively.

This indicates that in regard to motel accommodation: (a) there was little difference between the Gold Coast and in the remainder of Queensland, and (b) on the Gold Coast, mainly smaller motels were being replaced by other developments. These results also explained the difficulties in obtaining information from motel owners: some were so disillusioned about their business that they refused to answer any questions, while others could not be contacted at all.

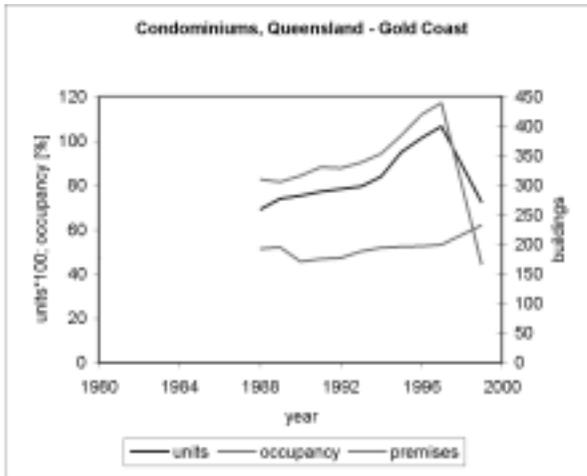
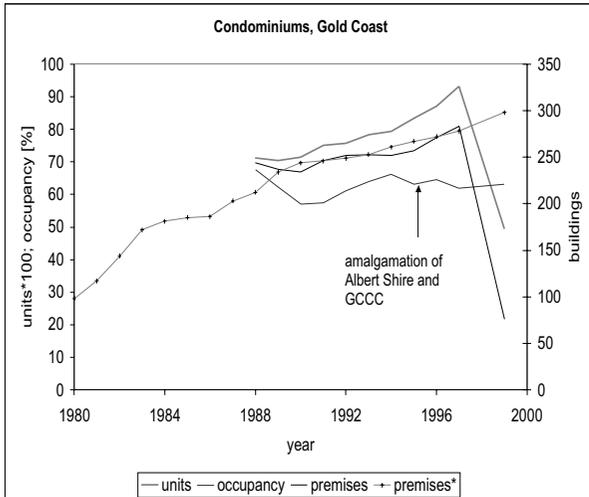
Condominiums

Fluctuations in the condominium market are likely to be the first indicators of more permanent changes to visitor preferences or visitor profiles, either within a destination or between destinations. Changing the set-up of holiday apartments to permanent rentals and vice versa requires minimal or no alteration to management structures or existing facilities. The minimum scenario only requires a change to the rental agreement from a holiday letting to a six-month lease for a fully furnished apartment. Unfortunately, ABS data for condominium providers were only collected from 1988 onwards, i.e. after the GCs major boom during the early 1980s, and no information was collected about the proportion of holiday lettings over the total number of apartments.

During most of the years for which data were collected, the number of buildings providing holiday apartments as well as the overall number of these units increased in both, the Gold Coast and in the remainder of Queensland. The only exception was a brief decline during the two years after Australia's 1988 bicentennial celebrations. Increases in holiday lettings consolidated during the mid-1990s and the second half of that decade with a stronger growth in both buildings and tourist condominiums (Figure 6, ABS data).

Comparing the time line calculated from information collected for this study and the ABS data for annual totals of condominium buildings revealed differences of one percent or less. Even the amalgamation of statistical subdivisions from the old Gold Coast City and Albert Shire areas showed little increase in condominium providers and had little influence on these narrow error ranges. This confirmed the results from this study that most condominium establishments were located along the beachfront areas which all belonged to the old Gold Coast City Council district (see section 3.1.3).

The major differences between the two areas, however, were again highlighted with the exclusion of holiday apartment providers that offered less than 15 units per establishment (1999 ABS data). This resulted in a considerable drop in both, establishments and units, for the Gold Coast in 1999. In the remainder of Queensland on the other hand only the number of establishments revealed a similar decrease (Figure 6, ABS data). In other terms, the Gold Coast had many more condominium providers that offered between 10 and 15 units per building. As a result the average number of holiday apartments per building increased from 33 (1997) to 65 (1999), while the same averages remained smaller for the rest of Queensland, i.e. 24 and 44, respectively.



For 1987 to 1997, data were taken from ABS reports (ser. no. 8635.3) for each March quarter. Data for 1999 were obtained (a) from a special ABS service report (ser. no. 8365.3.40.001) for September 1999 or (b) this study; * figures calculated from opening dates for currently existing premises.

Figure 6
Annual Figures for Total Units, Total Premises and Occupancy Rates in Condominium Complexes in Queensland and on the Gold Coast, 1980 to 1999, Inclusive

3.1.3 Development in Space

Development of tourist facilities in the destination ‘Gold Coast’ has not spread evenly across the entire area, nor did it happen simultaneously or to the same extent in each of the destination’s subsections or nodes (e.g. Russell and Faulkner 1998, 1999). These nodes, areas or distinct sub-regions evolved mainly based on their geographic settings, recreation opportunity spectrums, accessibility from major urban centres, and, to some extent, personal interest of influential developers or entrepreneurs (Russell and Faulkner 1999).

The prime asset of the Gold Coast is a 30 km stretch of mostly open surf beaches. These beaches are interspersed by a row of headlands or rocky outcrops scattered close to, or right along, the intertidal zone, and are often associated with a small river or creek estuary (Map 1). Due to the area’s prevailing south-easterly winds and south to north inshore currents, each headland creates a protected northerly pocket followed by a tail of increasingly exposed open surf beaches. Although small in area, the combination of a headland plus river entrance not only introduces distinct landmarks and obstacles for transportation of goods and people, it also provides a greater variety of opportunities for recreational activities.

Another distinctly different shore area is the Broadwater with its low wave-energy environment of protected beaches, sand flats, mud banks and mangrove habitat. Its eastern shores along South Stradbroke Island are accessible only by boat and therefore mostly uninhabited, whereas the western shores on the mainland are urbanised and lined with small stretches of narrow sandy beaches. Here again, beaches are interrupted by small creeks. Some of creeks have been excavated to provide entrance for canal estates.

These differences in geomorphology were used to define administrative boundaries – initially between small townships, and later between suburbs. Several of these suburbs or townships evolved at different times into distinctive tourism nodes, which in turn resulted in noticeable differences in accommodation infrastructure. Taking all these factors into account allowed to divide the Gold Coast into 6 different zones or regions (Map 1). From north to south these were the areas from:

- Southport to Broadwater area, the old commercial centre and western Broadwater beaches;

- Main Beach to Broadbeach area, the major international tourism and high-rise accommodation centre;
- Mermaid Beach to Nobby's Beach, an area with expensive beach houses and mostly low level, low key tourism facilities;
- North Burleigh to Burleigh Heads, the second node with high-rise accommodation for mostly interstate and local tourists;
- Palm Beach to Currumbin, an area with cheaper beach residences and mostly low key tourist facilities; and
- Tugun to Coolangatta, the first and then superseded tourism hotspot on the Gold Coast.

More recently, a larger number of tourism facilities were developed in some of the urban areas behind the beaches and in the hinterland. For this study, the whole remaining area is referred to as the rest of the Gold Coast, although its section around Beenleigh has not been sampled in the field (see section 2.2)

Accommodation Facilities by Tourist Areas

Historically speaking, Southport and Coolangatta have been the first and initially most important tourism nodes. However, the major centre of the present destination 'Gold Coast' is the area from Main Beach to Broadbeach, which also includes the internationally most widely known tourist node 'Surfers Paradise'. This area currently holds, i.e. by the end of 1999, almost three quarters or 4999 out of 6831 hotel rooms, and 65 per cent of all tourist condominiums (6030 of 9233) identified by this study (Table 3). In regard to actual number of premises, percentages drop to 60 per cent and 56 per cent for hotel premises and condominium type accommodation buildings, respectively. This again indicates that premises with generally higher numbers of accommodation units per building are concentrated in this particular tourist node. On the other hand, the ratio of holiday units over the total number of apartments in condominium buildings is lower for the Main Beach to Broadbeach area if compared to the average for all other comparable tourist areas (0.61 vs 0.69), i.e. areas along the coast. This difference is only significant, if based on total numbers ($\chi^2 = 36.8, 1 \text{ df}, p \ll 0.001$), and no longer significant when based on means for holiday units/total units per premise. Nevertheless, these figures indicate that, relative to other areas on the Gold Coast, a greater proportion of the available apartments in the Main Beach to Broadbeach area were used by permanent residents.

Table 3
Tourist Accommodation Types by Major Tourist Areas

Tourist area	Hotels		Motels		Condominiums				Caravan	Backpacker /B&B			Premises
	rooms	no	rooms	no	units in bldgs	bldgs total	%	no	Parks sites	no	rooms	no	total
Southport – Broadwater	100	1	178	10	461	727	63	22	414	3	25	2	38
Main Beach – Broadbeach	4999	16	673	16	6556	10356	62	170	100	1	185	7	210
Mermaid Beach – Nobby's	n.a.	0	180	13	584	856	68	22	469	3	n.a.	0	38
North Burleigh - Burleigh	n.a.	0	178	6	970	1391	70	26	119	1	n.a.	0	33
Palm Beach - Currumbin	n.a.	0	114	9	368	463	79	14	742	2	n.a.	0	25
Tugun - Coolangatta	153	1	142	9	693	1072	65	37	280.	1	n.a.	0	48
Rest of Gold Coast	1544	6	160	6	127	302	42	9	1199	14	135	18	53
Total	6796	24	1627	69	9233	14616		300	3323	25	345	27	445

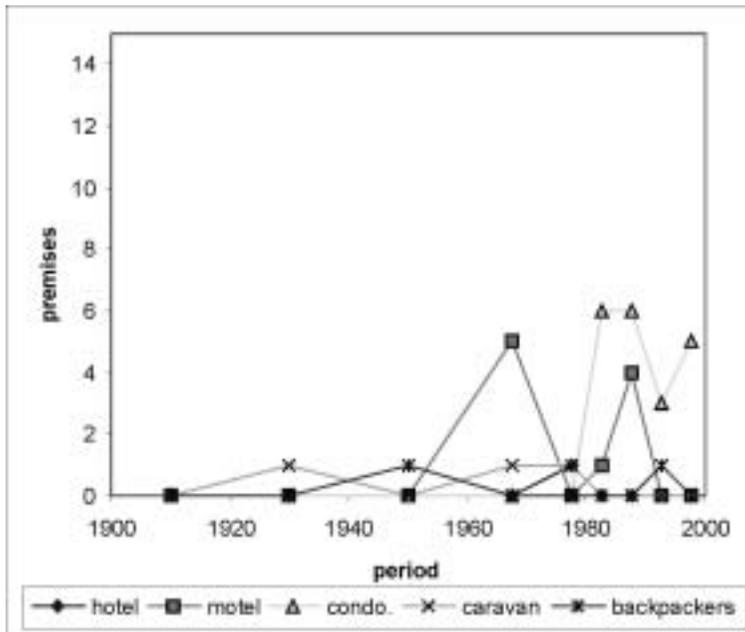
Southport to Broadwater

At the time of this study, the Southport to Broadwater area offered all types of accommodation: one larger hotel, two small hotels, several motels and condominium providers, three tourist caravan parks (i.e. mostly for short term occupants), and two backpacker-style 'resorts' (Table 3). As for many other tourist areas along the coastline (see below), the majority of buildings, accommodation units and beds (based on ratios calculated from the 1997 ABS survey 8635.3) were found to belong to condominium providers (Table 3). However, there was conflicting evidence in regard to the age of two condominium buildings. Consequently, these two accommodation providers could not be displayed in Figure 7.

Even in 1999, some of the area's earlier accommodation premises were still present, all located in and around the old business district: a caravan park, a small hotel and a boarding house turned into a backpacker facility (Map 2). One other hotel of the early exploration stage, the Pacific Hotel, survived only as a small section within a major shopping complex.

Both motels and condominium complexes were built on either side of the Gold Coast highway (Map 2). The former were built mostly along its northern stretches in the 1960s and during the boom in the early 1980s. All currently existing tourist caravan parks were developed prior to 1980. Condominium complexes for tourists, on the other hand, were constructed only from the early 1980s onwards, now

representing the only category of accommodation providers with continuous growth in the area (Figure 7).



NOTE: data points are shown for the mid-point in a time period, i.e. 1930 for the period between 1920 and 1940, inclusive.

Figure 7

Numbers of Accommodation Premises Built in the Southport-Broadwater Area between 1900 and 2000

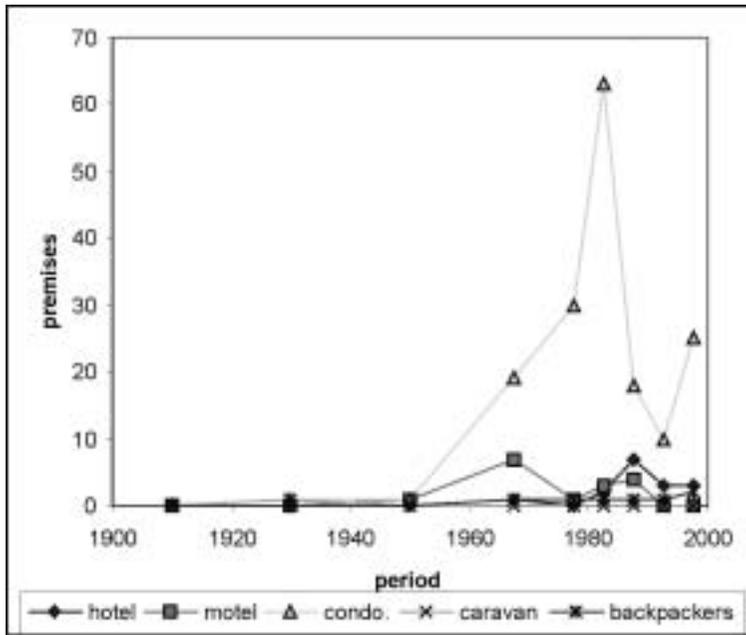
As envisaged in the 1973 Gold Coast Planning Scheme, a massive expansion of high density residential development into areas north of Southport and along the Broadwater occurred only sporadically. Since this tourist area is also the largest one, accommodation is thinly spread along its central road and the beach strip (Map 2).

Although caravan parks could offer the most accommodation units (tent and caravan sites) per premise, they also occupied the largest areas. Consequently, condominium providers remained the type of accommodation facility with the highest ratio of units per land parcel area.

Main Beach to Broadbeach

In terms of its accommodation infrastructure, the Gold Coast's major tourist node, Surfers Paradise, can be seen as having amalgamated with its immediate northern and southern suburbs, i.e. Main Beach and Broadbeach. In this area, accommodation facilities cover most of the space eastward of the Gold Coast highway and several blocks on its westward site. Very little is left of pre-WW II accommodation facilities, the only exception being the Main Beach caravan park that is still owned by Council. Facilities that did not survive the times include Jim Cavill's hotel, which was originally approved as the first major hotel for the Parish of Elston, i.e. prior to the time when the name 'Surfers Paradise' was coined, and Stanley Korman's Chevron Hotel, now replaced by a more recent structure, the Concord Hotel. On the other hand, a larger number of buildings have remained from the area's first development boom in the late 1950s and early 1960s. Particularly the first high rise apartment complexes proved to be very enduring: even the first multi-storey brick and concrete structure, the nine storey Kinkabool at 34 Hanlan Street, has remained until present, however not as a facility for tourists but as an apartment block for permanent residents.

The growth in condominium-type facilities has been the largest in the entire destination. It continued from the early 1960s to the mid-1980s, decreased over the late 1980s and early 1990s (Figure 8), and experienced a recent revival following substantial development activities in the northern and southern areas of Surfers Paradise, and in Main Beach and Broadbeach.



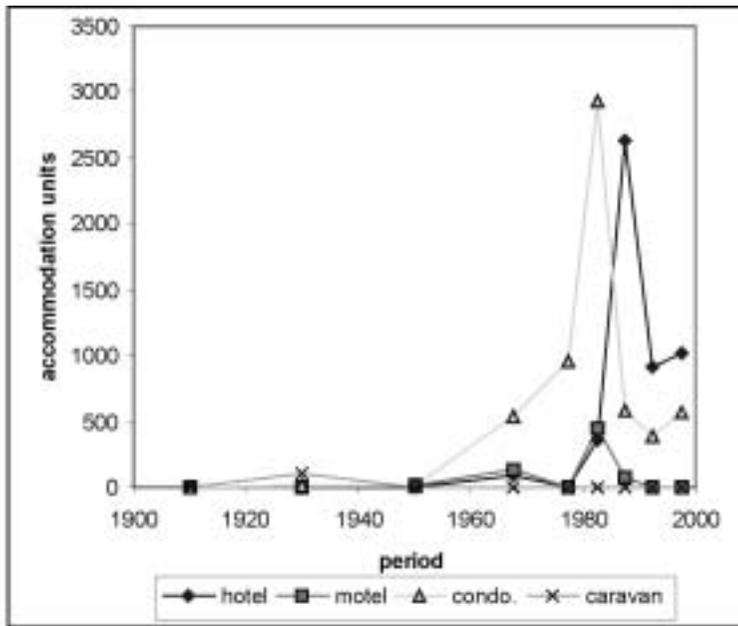
NOTE: data points are shown for the mid-point in a time period, i.e. 1930 for the period between 1920 and 1940, inclusive

Figure 8

Numbers of Accommodation Premises Built in the Main Beach to Broadbeach Area between 1900 and 2000

Apart from the two major hotels developed during earlier periods (see above), the majority of the area’s hotel facilities were developed during the mid and late 1980s. Based on 5 year intervals, construction activity in the hotel sector was steady in the Main Beach to Broadbeach area from 1990 onwards (Figure 8). In regard to overall number of accommodation units, however, the decline in serviced hotel rooms was almost as pronounced as for holiday apartment units (Figure 9). In other terms, the number of rooms built per hotel initially increased sharply during the late 1980s, only to drop considerably for hotel developments in the early 1990s.

This pronounced boom/bust cycle left the Main Beach to Broadbeach area with a large number of holiday apartments and serviced hotel rooms designed and constructed in the early and late 1980s, respectively.



NOTE: data points are shown for the mid-point in a time period, i.e. 1930 for the period between 1920 and 1940, inclusive

Figure 9

Numbers of Accommodation Units Built in the Main Beach to Broadbeach Area between 1900 and 2000

Black and white photos from the 1950s revealed that, prior to the first boom during the early 1960s, motels and what were most likely holiday homes represented the majority of accommodation facilities in this tourist area. A few small, old motels and several older private residences, located mostly along the Gold Coast highway (Map 3) and in the western parts of Main Beach and Surfers Paradise, are the only remaining properties of that period. A few larger motels with, on average, more than 50 rooms were built during the development boom of the early 1980s. After that, building activities in the motel sector decreased and finally ceased entirely for the time after 1990 until the time of this study, i.e. 1999 (Figures 8 and 9).

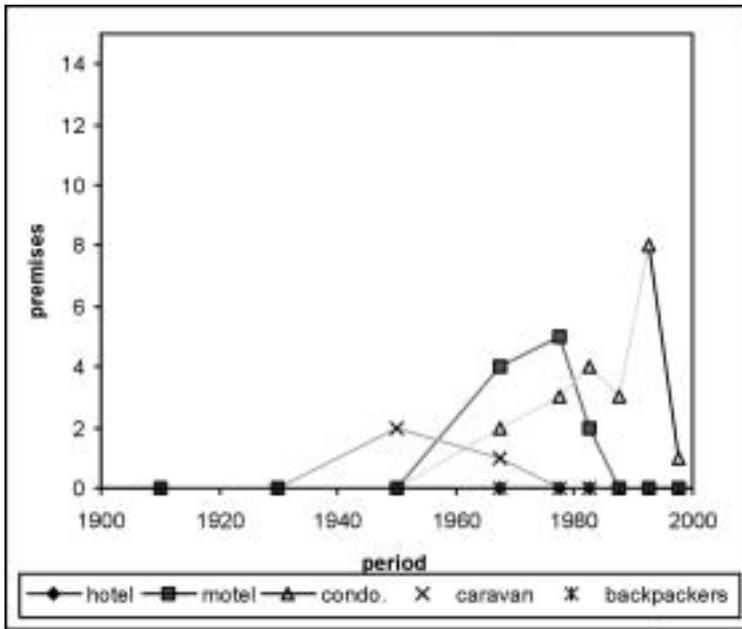
The role of caravan parks for accommodating tourists in the Main Beach to Broadbeach area was of significance only prior to 1950. One

Council-owned park remained at the area's very northern end (Map 3). This facility, however, was redesigned and refurbished in 1997 and now includes several permanent cabin-style units for short-term visitors who do not have, or do not wish to set up, a tent or van.

Although currently very small in overall numbers and units, backpacker-type facilities have continued to grow at a rate of about one facility in five years. Their impact will be discussed later and in more detail.

Mermaid Beach to Nobby's Beach

During the early discovery phase of the Gold Coast, the area between Mermaid Beach and Nobby's Beach was only accessible by coaches running along the beach at low tide. The first major development in this area occurred after WW II when a lot of cheap summer houses, caravan parks and small motels were erected in order to accommodate local and interstate tourists. Hotels were never envisaged. Until the early 1970s, therefore, development in the area was mostly of low density, i.e. detached dwellings, a few two-storey apartment buildings and small motels. With a new town planning scheme introduced in 1973, Council planners decided to maintain the low-density development structure and imposed a three storey height limit over most of the area. With a few exceptions along the beachfront, this limitation in building height was effective until the time of this study. As a result, development in regard to tourism facilities has been moderate and several of the older premises have remained: three caravan parks of the 1950s and 1960s, 13 small motels built between 1967 and 1982, and 22 condominium providers (Table 3 and Figure 10 below).



NOTE: data points are shown for the mid-point in a time period, i.e. 1930 for the period between 1920 and 1940, inclusive.

Figure 10

Numbers of Accommodation Premises Built in the Mermaid Beach to Nobby's Beach Area between 1900 and 2000

Apart from six facilities, i.e. one motel, two caravan parks and three condominium complexes, all other accommodation places were located on the beachside of the Gold coast highway (Map 4). The largest number of units per accommodation facility was found for caravan parks, yet overall numbers were largest with condominium-type facilities (Table 3). However, this situation only developed recently, i.e. mainly in 1993 and 1994, when several larger apartment blocks were built which all contained more than 50 condominiums (Figure 11 and Map 4). It is also worth noting that two of the most recent, up-market apartment blocks were built on a site originally occupied by a small theme park, the Magic Mountain site.

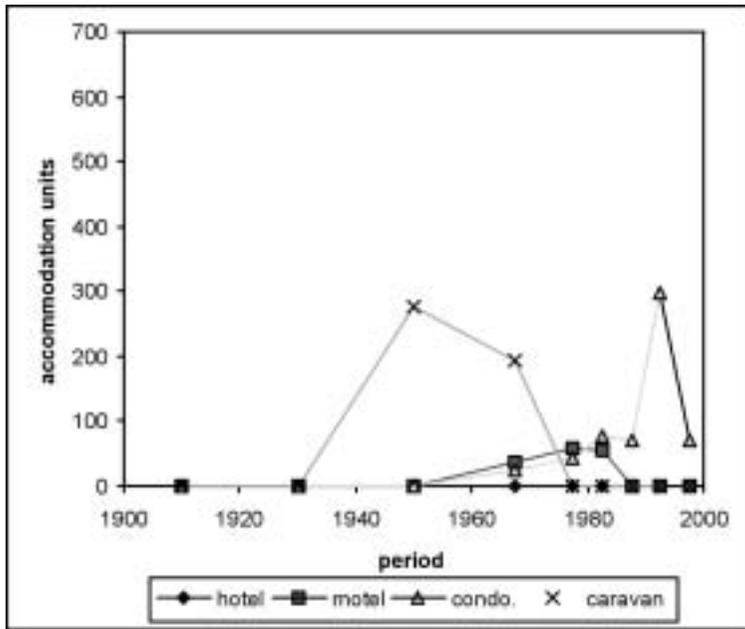


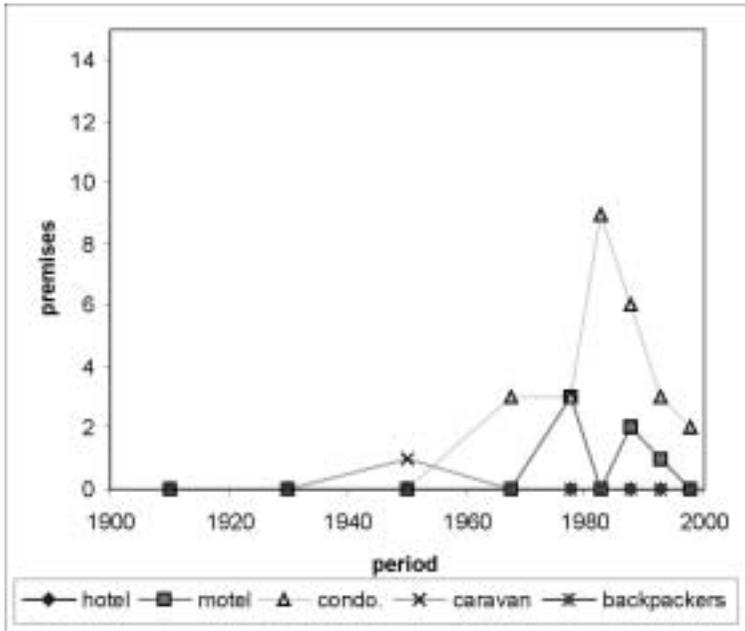
Figure 11

Numbers of Accommodation Units Built in the Mermaid Beach to Nobby's Beach Area between 1900 and 2000

North Burleigh to Burleigh Heads

Due to its outstanding views and protected sandy coves, Burleigh Heads attracted visitors at the very early stages during the evolution of the destination 'Gold Coast'. Initial tourist accommodation was restricted to tents, boarding houses and small hotels. Of all initial facilities, only two small hotels remained and now generate their main business by operating a bottle shop and gambling facilities (Map 5). Mainstream tourist facilities at the turn of the millennium included 16 high rise condominium towers (>8 storeys) and 10 medium size apartment complexes (<4 storeys), six mostly small motels, and one caravan park. Apart from two motels, all other accommodation facilities were located on the eastern side of the central traffic axis, the Gold Coast highway.

With the exception of absent hotels and backpacker facilities, development cycles in the North Burleigh to Burleigh Heads area were similar to those observed for the Main Beach to Broadbeach. Camping facilities were replaced by, or supplemented with, condominium-style accommodation during the late 1960s and, to a greater extent, in the early to mid-1980s boom (Figure 12). Most motels were added during the late 1970s mid-1980s. Development activities in the motel sector ceased entirely for the late 1990s and also condominium complexes were added at much slower rates.

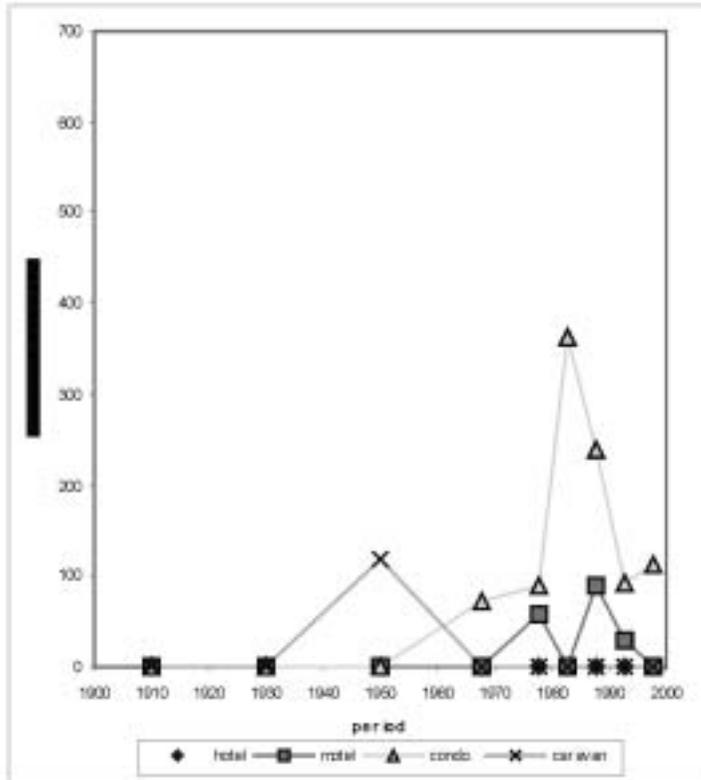


NOTE: data points are shown for the mid-point in a time period, i.e. 1930 for the period between 1920 and 1940, inclusive

Figure 12
 Numbers of Accommodation Premises Built in the North Burleigh to Burleigh Heads Area between 1900 and 2000

A similar pattern is repeated for accommodation units, i.e. caravan sites, serviced motel rooms, condominium apartments (Figure 13). On average, the numbers of tourist apartments per condominium did not change much over time. However, a bigger second peak for motel

rooms indicates that the two motels constructed during the mid-1980s provided more serviced rooms than the 3 motels developed prior to that period (Figure 13).



NOTE: data points are shown for the mid-point in a time period, i.e. 1930 for the period between 1920 and 1940, inclusive

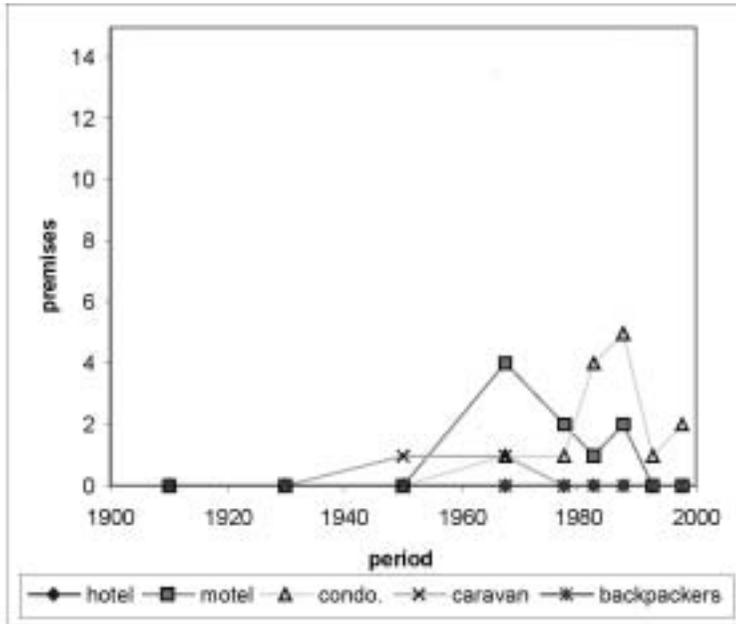
Figure 13

Numbers of Accommodation Units Built in the North Burleigh to Burleigh Heads Area between 1900 and 2000

Palm Beach to Currumbin

Of all tourist areas along the beach and Broadwater waterfront, the area between Tallebudgera Creek and southern Currumbin was the least developed. All but two accommodation facilities were low-rise

facilities, i.e. less than four storeys. In contrast to all other tourist areas, the majority of accommodation units were found to be van sites in the area's two caravan parks (Table 3). The general development pattern, however, was similar to other areas on the Gold Coast. In terms of their age in 1999, caravan parks were the oldest facilities, followed by motels, most of which were developed in the late 1960s (Figure 14). Condominium complexes, particularly the larger ones, were built during the early 1980s and mid-1990s.



NOTE: data points are shown for the mid-point in a time period, i.e. 1930 for the period between 1920 and 1940, inclusive.

Figure 14

Numbers of Accommodation Premises Built in the Palm Beach to Currumbin Area between 1900 and 2000

Both caravan parks were located on the western side of the Gold Coast highway, together with four small motels and two smaller condominium buildings (Map 6). All remaining accommodation

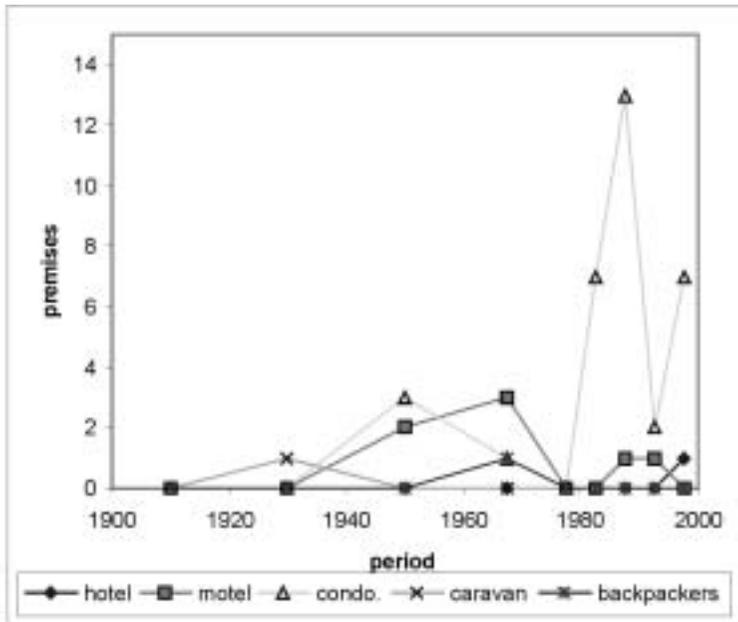
premises occupied land on the beachside of the area's main traffic axis.

Tugun to Coolangatta

The area between northern Tugun and the border between Queensland and New South Wales has the most protected ocean beaches on the Gold Coast. Consequently, it was the first area to be primarily developed for tourism needs. With the opening of the railway line between Brisbane and Coolangatta in 1903, early forms of mass tourism pushed the area to its capacity at the time (Russell and Faulkner 1998). Most of these visitors stayed in tents erected on any suitable place and without appropriate toilet facilities.

More and more small hotels and boarding house facilities were developed, and Council provided funds to establish orderly camping facilities serviced with town water and reticulated sewage facilities. By the mid 1950s, Coolangatta was at its peak and attracted the majority of visitors coming to the Gold Coast. Almost 50 years later, only a Council owned caravan park and a few old motels and guesthouses are the remains of this era (Figure 15). High-rise or large scale condominium developments now occupy much of the town's beachfront and hill slopes (Map 7). Most of these accommodation complexes were built during the early and, even more so, the late 1980s, i.e. the destination's two major boom periods (Figure 15).

The northern stretch of the Tugun to Coolangatta section of the Gold Coast is different to other beachfront areas because it was literally divided into a western and eastern section by a major arterial road, the Pacific Highway. All traffic passing through the Gold Coast from Brisbane to northern NSW or travelling in the opposite direction had to follow this section of highway, which ran parallel along the area's major airport. As a result, all tourist accommodation facilities were located east of this major traffic axis (Map 7). Although there has been some increased development activity in this particular area, few of the new apartment buildings included accommodation for tourists. Most facilities providing rooms for over night visitors dated back to the late 1980s.



NOTE: data points are shown for the mid-point in a time period, i.e. 1930 for the period between 1920 and 1940, inclusive

Figure 15

Numbers of Accommodation Premises Built in the Tugun to Coolangatta Area between 1900 and 2000

Shaped by its geomorphology and past and present development activities, the Coolangatta of the late 1990s appeared to have evolved into 3 discernable sub nodes. Following the coast from west to east, the first area is a section of beachfront development along Coolangatta Beach, which is almost completely built up with a sequence of high-rise/shopping mall complexes. This area is followed by a short stretch of older establishments located to the southwest of the protected beach cove created by the Greenmount headland. The last subsection is a mix of old and new, high-rise and low-rise condominium facilities on the Greenmount and Point Danger headlands. No other tourist area displayed such a distinct micro pattern of tourism development.

Utilisation of space

The common concept of major international hotels being mostly high rise buildings would lead to the believe that this accommodation type is the most space efficient, i.e. using on average the smallest area of land for each tourist bed they provide. On the Gold Coast however, there were several major hotels built as low rise resort complexes occupying large parcels of land. Overall, premises of international hotels covered more land than all condominium providers and motels together (Table 4). These figures changed considerably after buildings smaller than 4 storeys were excluded. Then, the amount of ground space required per bed in an international hotel and a condominium complex averaged 15.47 m² and 16.77 m², respectively. If these numbers were calculated for beds in actual tourist apartments, and not for beds in all apartments in a given building, then the amount of ground space per bed in a high rise tourist apartment increased to 29.54 m² (Table 4).

Table 4
Space utilisation of major accommodation providers on the Gold Coast

Type	Area of precinct/ bed* [m ²]	N	Total precinct area [ha]
International hotel	62.84	24	108.797
International hotel > 3 storeys	15.47	18	27.974
Motel	60.77	67	17.428
Condominium (all apartments)	20.42	271	90.693
Condominium (tourist apartments)	33.72	278	92.926
Condominium (all apartment) > 3 storeys	16.77	163	57.278
Condominium (tourist apartments) > 3 storeys	29.54	166	58.768

NOTE: numbers of beds were calculated using ABS figures from Table 1, i.e. 3.2 beds per serviced room in hotels and motels and 3.8 beds per self contained tourist apartment.

In other terms, high rise accommodation is the most efficient way to provide a maximum number of beds by utilising the least ground space – with only small differences between condominium-style accommodation and hotels. When strictly focusing on bed spaces for tourists, however, condominium complexes are less space efficient. Because of their mix of tourist and residential use, more buildings are required and therefore more space has to be wasted in order to accommodate the same number of tourists of a comparable hotel.

3.2 Tourism Hot Spots: Age and Density Issues

As emphasised earlier, man-made infrastructure and facilities are likely to change a tourist destination much faster than natural processes – with the exception of major catastrophes such as tsunamis, cyclones, etc. Man-made facilities such as hotels and condominium complexes require substantial investment and are planned, designed and built to last at least several, i.e. two to three or more decades. In order to minimise exposure to financial risks and potential economic failure, most facilities are developed in ways, which increase residential density and overall values of pre-existing structures. Reflecting on the history and evolution of the destination ‘Gold Coast’ as a whole, this development principle lead to a distinct succession of accommodation types and buildings, which could still be traced in the Gold Coast of 1999.

Early Days: Tents, Boarding Houses, and Small Hotels

Tourist accommodation during the early days was characterised by low density or temporary facilities: many visitors stayed in tents or used boarding houses usually not higher than two storeys. Visitors willing to accept higher expenditures for accommodation could stay in small to medium size hotels, which rarely exceeded 35 rooms. Only a few of these facilities remained, and most of them were changed to provide a style of accommodation different to the original concept, or else, facilities were used primarily for non-tourism purposes. Notable examples are the Coolangatta Sands Hotel at the corner of Griffith and McLean Streets in Coolangatta, now advertising for backpacker-style accommodation, and the Trekkers Backpackers Resort at 22 White Street in Coolangatta, which occupies an old boarding house.

The Next Level: Summer Holiday Houses, Small Motels (One Storey), 2-3 Storey Hotels

Post-fordist industrialisation introduced more private motor vehicles to a larger group of households, which allowed visitors from nearby cities to transport more items including tools and building materials to

their holiday destination. Visits to a nearby seaside resort also became less dependent on the railway system and its sometimes inconvenient schedules. This encouraged the development of a large number of cheap summer holiday homes all along the beach areas. Most of these houses were built using timber frames and fibro sheets, which often contained asbestos. Several of these houses still existed at the time of this study, particularly in the Palm Beach area to the west of the Gold Coast highway.

The other changes brought about by the introduction of motor vehicles were the development of motels (Figure 16). Their main concept was to provide a car parking space next to, or close to, a guest room. As a result, most of these facilities only used the ground level for providing accommodation. Several examples of these establishments remained in the Southport to Broadwater and Mermaid Beach tourist areas.



Figure 16
Typical Post WW II Single Storey Motel

Due to an increasing number of visitors to the area, hotels increased in size, but usually not in building height. Most facilities were expanded by adding extensions to existing structures.

Intermediate Phase: Multi-Storey Holiday Apartment Complexes, 2 Storey Motels, Multi-Storey Hotels

The first major step of increasing residential densities in tourist accommodation facilities began in the 1950s when the first multi-storey hotels and holiday apartment complexes were built. While hotels occasionally exceeded three storeys, apartment complexes usually remained at or below that level. Few examples of this intermediate period survived. The most famous, i.e. Stanley Korman's Chevron Hotel, was damaged by fire and, later, replaced. A few of the old fibro apartment buildings remained along Boundary Street in Coolangatta.

The First High-rise Buildings: 6–10 Storey Brick and Concrete Condominium Complexes, 10–20 Storey Hotels

The technology of using reinforced concrete and bricks to built high-rise buildings on sandy soils was introduced to the Gold Coast in the late 1950s. Soon after, the first boom in high-rise complexes hit the condominium and hotel sectors on the Gold Coast. Almost all of these structures could still be found at the time of this study, i.e. 40 years later. Prominent examples are the Kinkabool, the Paradise Tower, and as a later addition, the Queensleigh Holiday Apartment complex (for example, see Figure 17).



The built-up: >20 storey high-rise condominium resorts, >20 storey hotels

Figure 17
Early High-rise Apartment Complex in Surfers Paradise

Changes to taxation regulation on deceased estates in Queensland, the deregulation of the Australian Dollar and a strong interest from overseas buyers (Hajdu 1993) triggered a massive flow of foreign investment capital into Australia and a major development boom on the Gold Coast in the early 1980s. A second wave of major foreign investment activities was generated by the Japanese ‘bubble economy’ of the late 1980s. Changes to the *Foreign Takeovers Act* (1975–1989) Cth, low interest rates and large trade surpluses enabled Japanese

investors to buy and develop real estate at a large scale, particularly in Sydney and on the Gold Coast (Haydu 1993). As a result, residential densities increased considerably with thousands of apartment units and hotel rooms being constructed in high-rise buildings in areas along the beach strip. Properties in Surfers Paradise, Broadbeach, Main Beach, Burleigh Heads and Coolangatta were the major targets during these booms. Typical buildings of the pre-1980 period and the early 1980s are shown in Figure 18.



Figure 18

View into Northern Surfers Paradise with High-rise Condominium Complexes from the Mid 1970s and Early 1980s

On the Gold Coast, development activities increased again during the second half of the 1990s, particularly in Broadbeach, Main Beach, and Coolangatta. Buildings constructed during this period included a number of 3 storey condominium complexes (Figure 19) and large, mostly air conditioned high-rise towers often concentrated in a small area (Figure 20).



Figure 19
Four Storey Condominium Complex Erected in 1999



Figure 20
High Rise Development in Main Beach Constructed between 1997
and 1999

3.2.1 Critical Types of Development

Considering the historical development of the Gold Coast, data from this study, personal observations over seven years, and the accommodation type succession model as the quintessence for development in a major destination, the accommodation structures likely to cause the biggest problems in the future are strata-titled high-rise condominium complexes. Reasons for this are at least threefold.

At first, most apartment buildings are owned by several parties. Many condominiums are bought by private persons or family trusts as investment assets and as a means to reduce taxable income (negative gearing). Over several decades, these buildings may be refurbished several times and receive major facelifts, but eventually their style and design will become outdated, i.e. they become less attractive. Where a development company wants to replace such an old apartment complex with a new and more attractive structure, prices have to be negotiated for each unit with each individual owner. It is economically unfeasible to pay the original price (money value adjusted) for these apartments. The average 15 to 20 storey high rise tourist condominium complex on the Gold Coast has 66 units. Using a conservative estimate of an average of \$150,000 per unit (current dollar value), a developer would have to invest ~ \$10 Million for the existing property alone without considering costs for demolishing the building. This set of conditions suggests that the market value of units will have to decline significantly before existing high rise facilities can be redeveloped. This, however, has two major consequences:

- it contradicts the notion on which many of these investment objects were bought in the first place, and
- low value real estate often entails reduced body corporate fees, lower rents and higher chances of attracting rowdy tenants or tourists – all factors, which can accelerate the depreciation of the building and, eventually, other properties in the neighbourhood.

Another possible scenario could develop from recently promulgated provisions under S. 113 of the *Body Corporate and Community Management Act 1997* (Qld) and S. 98 of the *Body Corporate and Community Management Regulations (Accommodation Module) 1997* (BCCM(AC)R) or S.38A under the *Building Units and Group Titles Act 1980* (Qld). These sections deal with financial management arrangements and require all body corporates to set up sinking funds that should cover capital

expenditures for major refurbishment works. Theoretically, this could provide enough funding to maintain and refurbish existing buildings for much longer than 40 or 50 years. A major problem remains with long-term management policies for relevant sinking funds: these policies (and the resulting cash flow plans and levies) have to be approved by the body corporate board or committee, which includes representatives of the owners of individual apartments. Because S. 98 BCCM(AC)R does not specify the type of work to be covered by sinking funds, the exact structure and extent of works to be covered by these funds largely depends on either (a) obligations under relevant building safety standards or (b) the above-mentioned management policies of the body corporate. It is unlikely that major beautification works (e.g. changes to structural features of the building's façade) will be required under building safety standards. Incorporating such expenditures into cash flow plans for sinking funds is therefore dependent on management policies of the body corporate, which largely rely on the willingness of the building's owners to accept respective levies. Extensive facelifts of older buildings can become a problem where funds for respective beautification works have not been fully included into expenditure schemes of existing sinking funds. Property owners in such buildings may not accept additional levies to cover these costs, particularly if the resulting monthly body corporate fees and overall tax deductions equal those of more modern properties. Certainly owners who occupy their properties have little or no sympathy for further increases in body corporate fees. Also, high body corporate fees are only acceptable for non-resident investors during times of economic booms, i.e. when higher tax deductions are desirable. It is therefore quite likely that body corporates of older buildings look at gradual depreciation than major upgrades.

If any of these two aspects of redevelopment become apparent at a larger scale, it might affect the whole condominium market on the Gold Coast. The reality of these problems with multi owner buildings is best highlighted by the fact that, at the time of this study, it has been so far avoided: only two of the first larger condominium buildings of the early 1960s have been replaced with a newer structure. One, i.e. 'Ten the Esplanade', was never strata-titled, and the other, 'Saharah Court', incurred massive losses to overseas investors. On the Gold Coast, almost all high-rise condominium buildings have been erected on unoccupied land or on parcels with detached residential dwellings, small motels, etc. A few older buildings have been

repainted or refurbished, yet their overall appearance still indicates their progressing age (Figure 21).

Secondly, condominium buildings were built in much larger numbers than hotels and motels or caravan parks. During development booms many buildings of the same architectural design are constructed at the same time. Although it is unlikely that all of these buildings are built in one area, it is however quite possible that, during these times of rampant land and real estate speculation, development activities concentrate in a few areas. If an area with little else but condominium complexes contains several buildings of the same type and the same age, and if these buildings are being depreciated at approximately the same time, then this area can attract a relatively large number of tenants (tourist or residents) on lower incomes. The contrast to areas with modern condominiums and hotels can then create social disparities, unrest and even crime. Unfortunately, it is not uncommon that these conflicts are battled out against the perceived epitomes of this discrepancy. In the case of an international destination, the most likely 'targets' for these conflicts are the apparently wealthier foreign tourists, who simply stay away if their holidays can be affected by hostile sentiments or simply a cheap and rowdy atmosphere.

Finally, replacing older buildings with larger structures leads to more storeys and more apartments per square metre of land. Rejuvenating older parts in major tourist nodes can therefore result in a substantial increase in visitor densities, particularly where older buildings are already high rise complexes. Compared to other international destinations, e.g. cities along Spain's Costa Brava and Costa del Sol or Waikiki on Oahu (Hawaii), visitors on the Gold Coast can spread out much further, which allows them to maintain relatively low densities, even during peak holidays. This provides an important advantage in an increasingly competitive international market, which can easily be lost by constructing too many and too large facilities in relatively confined areas.

Other accommodation facilities are likely to carry some, but never all of the risk factors identified above, are:

- motels: mostly owned by a single company or person, not of high rise style, often located along major roads and therefore spread over larger areas
- hotels and caravan parks: mostly owned by a single company or person, built in much smaller numbers (e.g. hotels, caravan parks).



Figure 21
Recently Refurbished 19 Storey High-rise Built in the 1970s

3.2.3 Future Risk Areas on the Gold Coast

Using multi-layered thematic maps based on attributes for ‘building age’, ‘accommodation type’ and ‘building height by storeys’ (see Map 8) three of the 6 major tourist areas of the Gold Coast were identified as future risk areas, i.e. areas with several older high rise condominium buildings. Most of these older buildings were located in Surfers Paradise, in the middle of the Main Beach to Broadbeach area. Other areas with older high-rise structures were found in Burleigh Heads and Coolangatta, probably because of their early discovery and subsequent development into larger nodes.

Surfers Paradise

The major area of concern is Surfers Paradise. During the scoping phase for the Gold Coast visioning project a member of the Gold Coast Businesses Association summarised it as ‘Fix Surfers Paradise and the destination will improve over night’. A closer inspection of a multi-layered thematic map and subsequent field inspection, however, revealed only two critical sections of Surfers Paradise: approximately 9 hectares at the northern entry to the suburb and 30 hectares at the southern end (Map 8).

Northern Surfers

Most of the land parcels in the northern area are occupied by 14 condominium buildings, a backpacker place and several three to four storey apartment blocks for long-term residents. Overall, around 860 apartments are provided in these 14 buildings, which are mostly between 20 and 35 years old (Map 9). With an estimate of 3 persons per apartment, the potential population (tourists and/or residents) being attracted to this area by cheaper rents in 15 to 25 years time could amount to ~ 2,500 people. This is probably not an alarming figure by itself. The major problems in this area were that:

- all other land parcels, apart from a small island south of Higman Street, were already occupied by apartment buildings,
- this area represented the northern entry into Surfers Paradise, and
- it already generated a stark contrast to very modern developments around it: the Marriott and Sovereign Hotels, and the Sun City and Crown Tower Resorts.

This northern section of Surfers Paradise will be in serious need of a major rejuvenation in 20 years time. Otherwise it may become a problem area for developments in that neighbourhood.

Southern Surfers

The other area of concern in the southern part of Surfers Paradise has been largely developed during the construction boom of the early 1980s (Map 10). By the end of 1999, the area then provided around 2200 apartments in 36, mostly high rise, condominium buildings. The only other accommodation facilities included a new international backpackers resort built in 1998 and five, mostly older motels.

This part of the Gold Coast could become one of its biggest problems. It is wedged between the Nerang River and the Pacific Ocean with little room for expansion. In 20 to 25 years, the majority of buildings in this area will be 35 to 40 years old, and this includes several non-tourist apartment complexes along the beachfront, which were not included in this study. This means, that rejuvenation has to come from redevelopment in an area, which can accommodate more than 7,000 people, but which has little else to offer apart from its beaches. At the time of this study, the next shopping/entertainment centre, Cavill Mall, was located around 1,2 km from the area's midpoint. There were no major public parks or barbecue areas for visitors to enjoy a walk other than a beach walk. Even the beaches were affected by some of the largest high rise buildings built directly along the beach. These large structures start to cast shadows onto sun bakers soon after midday.

In short, the area offered little incentives for development companies to invest in redevelopment. The only reason for an involvement would be low property values – with all its potential consequences (see discussion above). In a worst case scenario, the whole area could become the destination's first run down neighbourhood with a high population density, thereby cutting the coast into two parts and tarnishing the image of the whole destination.

3.2.4 Conclusion

In order to determine the likelihood of a worst-case scenario, several additional studies are needed which have to address the following questions:

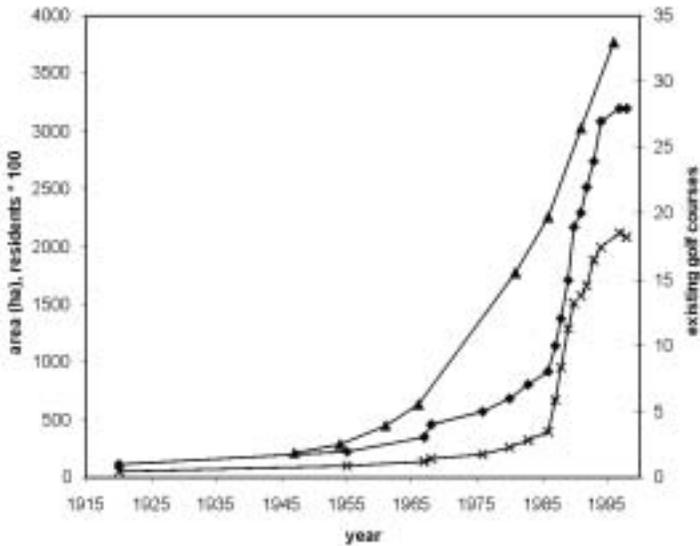
- How important is the ‘modern appearance’ of accommodation facilities for what type of visitors to the Gold Coast?
- How many body corporates with buildings in the two critical areas incorporated expenditures for major face lifts in their sinking funds?
- How much development space remains to allow construction of new buildings in the identified areas, and how can this and major refurbishment or replacement of older buildings be encouraged without reducing the general market value of the area?

3.3 Golf Facilities

In today’s global tourism market, golfing facilities provide a competitive edge for a destination, turning golf into an integral part of the tourism product – particularly in the up-market resort sector (Wason 1992, Priestley 1995, Schwanke 1997). Because these facilities cannot be developed without allocating considerable natural (land, water) and financial resources, golf courses on the Gold Coast were considered as a special class of tourism infrastructure.

At the time of this study, golf enthusiasts in the Gold Coast City Council area could choose from 28 golf courses (Map 11). Other golf facilities located immediately adjacent to the city’s boundaries were not considered because they were subject to regulation by other local authorities. Construction had commenced for two more golf courses, and a further 39 approvals for developments with golf facilities could be found on Council’s town planning register. Of these 39 remaining approvals, only 15 were shown as ‘Special Facilities’ or ‘Special Residential’ zones on Council’s current town plans, while the rest were either held up in court or remained inactive because developers failed to obtain further permits from state government authorities (e.g. removal of mangroves). Three of the 39 approved developments with golf facilities had proceeded under revised planning approvals that eliminated the golf component.

Most existing courses opened for business between 1985 and 1994 (Figure 22). The year 1985 marked a key point in golf course development with the introduction of the first ‘modern’ integrated golf resort, i.e. the ‘Palm Meadows’ golf facilities. From there on golf developments took on a larger prospect (Figure 22, and Rimmer 1994).



▲resident population; ◆ golf courses; ■ total area (ha) covered by golf courses; resident data for 1954-1966 are estimates or based on censuses different than those for the Australian Bureau of Statistics (ABS).

Figure 22
Golf Links and Resident Population on the Gold Coast

At the time of this study, 23 of the 28 existing golf courses were public or private/public, i.e. accessible for tourists and residents alike. Originally, eight of the 28 golf courses in this study were approved with hotel facilities, but only four of the recently completed resort golf courses now include a hotel complex within the development precinct. For one golf resort, it took 11 years after the opening of the golf course to build the hotel component (the Radisson at Palm Meadows).

In 1999, players could choose from less expensive 9 hole short courses to 18 or 36 hole ‘Augusta dream’ - style resort courses with associated facilities such as driving ranges, restaurants, pools/spas, and tennis courts (Table 5).

Table 5
 Characteristics of Existing Golf Links in the Gold Coast City Council Area

	9 hole			18 hole		
	Precinct Area (ha)			Precinct Area (ha)		
	No	Mean	1 s.e.	No	Mean	1 s.e.
Public	7	22.4	10.0	13	97.7	18.1
Private/public	–	–	–	2	49.9	9.8
Strictly private	–	–	–	5	91.8	30.2
<u>Golf course operation part of</u>						
Resort ¹	–	–	–	2	55.1	15.0
Residential estate	–	–	–	2	65.6	4.1
Resort ¹ / Residential	–	–	–	4	166.9	29.8
Stand alone	7	22.4	10.0	13	73.8	15.9
<u>Associated facilities:</u>						
Driving range	–	–	–	15	98.9	17.5
Restaurant	2	17.2	1.3	11	91.1	19.7
Pool/Spa	1	18.5	–	8	111.5	27.6
Tennis	1	18.5	–	6	59.9	4.4
<u>AGU ranking²</u>						
Low	1	15.9	–	4	43.5	7.6
Medium	–	–	–	5	87.1	1.2
High	–	–	–	8	118.4	23.0
Not listed	6	23.5	11.8	3	79.5	21.0
Total	7	22.4	10.0	20	89.7	

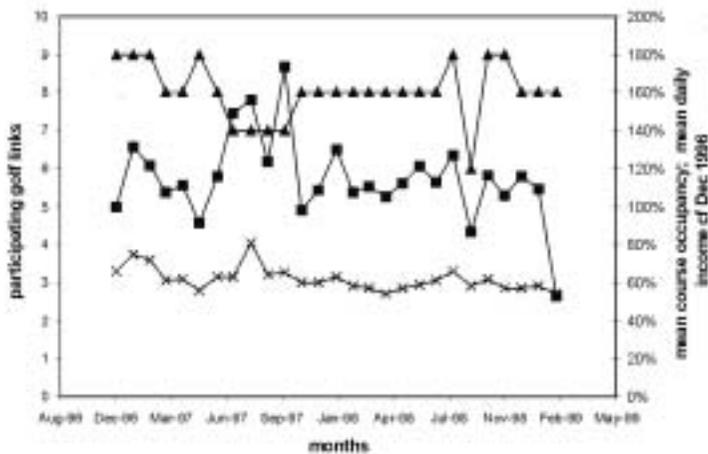
NOTE: 1 = hotel on golf premises or golf facilities under contract with hotel; 2 Australian Golf Union (AGU) ranking is based on an average price per round; the only 36 hole course on the Gold Coast was opened as a high price resort course in 1990 on 123 hectares (AGU rankings).

Considering advertisements for golf resort holidays in other destinations (Florida, Costa del Sol, Hawaii), a modern course design of lush green, impeccable (i.e. mowed) turf and vast open landscapes with little obstacles impeding the panorama seemed to be imperative for resort courses in an international destination. This type of design also helps to maintain speed-of-play standards and allows high handicap players some playing-derived satisfaction. As these players have minimal control over their golf shots, it would make for a long unenjoyable day if they were required to make many difficult shots from longer grass off the fairways.

Personal inspection of all courses revealed, that, in general, fairways and areas between fairways were mowed. Furthermore, none of the golf courses had fairway-aligning roughs consisting of tall grasses or native shrubs, i.e. roughs similar to those found on the original golf links in Scotland or Britain. In short, most golf courses on the Gold Coast were of modern, compact design with some of the

newer ones advertised as so called ‘signature courses’. These latter are courses where layouts were drawn by internationally renowned golfers, e.g. Greg Norman and Jack Nicklaus.

On the one hand, the Gold Coast had almost everything on offer the average visiting golf player could hope for. On the other hand, interviews with golf managers revealed that at least some of the courses were struggling financially. Three large courses were in receivership, another two courses hired external contractors for course maintenance. Work on a large, partly constructed golf course had ceased for more than one year and two other courses were for sale. An American company, ClubCar, recently purchased another major golf course. Overall, these incidents did not indicate a good economical performance of the area’s golf market. Monthly data collected mostly from eight major golf courses over two years (The Griffith University Golf Monitor, Centre for Hotel Management and Tourism Research, unpublished) supported these findings (Figure 23).



▲ number of participating golf courses; ■ mean daily income as proportion of December 1996 takings; ✕ mean occupancy rate per month

Figure 23
Occupancy Rates and Mean Daily Income of 9-6 Golf Courses (Griffith University Golf Monitor)

Over the last two years, mean monthly occupancy rates remained mostly at 60 per cent, although higher levels of occupancy were recorded in August, i.e. the dry season. On average, 3600 rounds (maximum 4828, minimum 2777) were played per course per month over 27 months between November 1996 and March 1999. Furthermore, it is important to note that no major increase in occupancy rates or takings occurred over the last two years (no additional course opened, but one closed). However, two more courses of same category were under construction.

Summary

In regard to size, design, price category and age, the Gold Coast had about every type of golf facility a golf tourist could desire. Course occupancy rates and indications of financial difficulties, however, suggested that the demand for golf opportunities hasn't ousted its supply. It seems therefore ill advised to consider the risk of promoting construction of further golf facilities, not only for economic reasons but also for political and environmental reasons. Golf courses are known for their considerable potential to cause adverse environmental impacts (Balogh *et al.* 1992, Miles *et al.* 1992, Cohen 1999) and opposition amongst local residents.

3.4 Theme and Tourist Parks

Major tourist destinations or tourism urbanisations are primarily constructed for the consumption of pleasure (Mullins 1991). Such pleasures can be derived from enjoying components of the natural environment (surf, beaches, etc), food, or entertainment provided in, and by, man-made facilities. The epitome of such made-made pleasure facilities is a theme or tourist park.

In 1999, the Gold Coast hosted eight theme and tourist parks and several smaller facilities such as go-cart racing tracks, bungee jumping and sling shot facilities, ice and inline skating rinks, in-door rock climbing centres, etc. The area's theme parks could be divided into four types:

1. Major parks offering rides, shows and often wildlife displays ('Seaworld', 'Movieworld', 'Dreamworld');

2. 'Sports' parks where visitor entertainment is dominated by providing facilities for recreational leisure activities ('Cable Ski World', 'Wet n' Wild');
3. Wildlife parks which attract visitors by displaying native animals ('Currumbin Wildlife Sanctuary', 'Fleay's Wildlife Park'); and
4. Arts and crafts parks with street entertainment and shopping facilities (Arts & Crafts World).

With the opening of 'Marine Land' (later 'Seaworld') on the Spit in 1971, major theme parks were added in intervals of ten years: 'Dreamworld' in 1981 and 'Movieworld' in 1991. Every year, all major parks add new attractions (rides or shows) or upgrade old ones. In intervals of two to five years over the past 10 years, existing parks included major, new entertainment facilities (e.g. 'Batman the Ride' ('Movieworld'), 'Tower of Terror' ('Dreamworld'), 'Dolphin Cove' ('Seaworld'). Major parks also run regular advertisement campaigns on local and national television channels. With regard to their standing in the world's theme park market it is currently unclear to what extent the Gold Coast's theme park facilities attract international visitors and how they value compare to internationally renown facilities such as the Disney enterprises in the US, Europe and Japan or 'Seaworld' in San Diego, California.

The area's two major 'sports' parks, 'Wet n' Wild' and 'Cable Ski World' opened in 1984 and 1989, respectively. Their mode of operation is similar to major theme parks, only on a smaller scale. Upgrades to existing attractions are not as frequent, and advertisement campaigns focus on local and regional areas.

The two wildlife parks were amongst the oldest tourist parks on the Gold Coast. They both originated from initiatives of Gold Coast residents. Regular bird feeding at Currumbin was turned into the 'Currumbin Bird Sanctuary' in 1976, and an initially private collection of captive animals was converted into 'Fleay's Fauna Centre' in the 1950s. In 1999, the bird sanctuary, then 'Currumbin Wildlife Sanctuary', was managed by a trust while the other wildlife park was donated to State Government and operated by the Queensland Parks and Wildlife Services. Both parks display animals native to Australia.

Mainly because of their development during earlier phases of the destination's evolution, older theme parks, i.e. the wildlife parks and 'Seaworld', were located close to the beach strip (Map 12). The remaining parks were constructed along major roads on relatively flat

areas away from coast. Three large parks ('Dreamworld', 'Movieworld', 'Wet n' Wild') were directly accessible from the Pacific Highway, thereby keeping theme park day trippers away from the beach strip. Although all theme and tourist parks could be reached by using public transport (general bus lines, special theme park buses and coaches), many visitors preferred to come by car. During peak holidays, car parking facilities were often used to their maximum capacity which can lead to considerable traffic congestion in the late afternoon or when the parks close. For example, traffic from 'Seaworld' contributes considerably to traffic problems along Waterways Drive, Main Beach (J. Warnken, pers obs. 1999).

In the past, theme parks have not always enjoyed large surpluses on their balance sheets: for some time in the second half of 1990, Dreamworld was in receivership and later sold to an overseas investor. An older style theme park, 'Koala World' on the north bank of the Coomera River, was demolished and its site used for residential development. Even Seaworld had to scale down its expenditures for research when plans for a joint marine research centre with Griffith University were cancelled in 1998.

If the destination's appeal to national and international visitors is to be improved by adding a new major theme park, then more research into their attractiveness in an international market, careful consideration of location and an analysis of current market demands should precede such undertaking.

3.5 Facilities for Water Based Recreation Activities

In a typical seaside resort, water-based activities are the most common recreational activities that utilise a part or a component of the natural environment: bathing in the surf, swimming, surfing, fishing, diving, parasailing, windsurfing, water skiing, etc. Some of these activities are best enjoyed on open surf beaches, others require more protected waters.

The Gold Coast is one of the few places in the world that offers ideal conditions for both types of waters. Ocean water temperatures range between 17°C and 26°C. The area's sandy ocean beaches are subject to relatively small tidal prisms (~ 2m) and are almost free of marine pests (e.g. stingers). Strong sweeps and rips create problems

for bathers only during big swells, which mostly occur during the cyclone season and then only for a few days. In other terms, the surf itself is, for most of the year, perfect for bathing. In other areas in Eastern Australia, water temperatures are either too cold, or beaches are protected by reefs therefore reducing the surf to a minimal size, or coastal waters are known to contain marine life (box jelly fish, sharks, etc.), which can turn a swim into a life threatening experience.

Close to its ocean beaches, the Gold Coast has a long south to north stretch of protected inlet waters, referred to as 'The Broadwater'. In most of its southern parts, this area is only about 1.2 km wide thereby preventing any major wave built up from prevailing south-easterly or north-easterly winds. Therefore, only small open craft (i.e. tinnies) are affected during the relatively rare cases of severe weather.

In order to make these two areas available to visitors, certain infrastructure and services have to be provided. Since some visitor activities require the same facilities, the following sections on water-related recreational activities focus on facilities rather than activities per se.

3.5.1 Surf Life Saving Clubs and Towers

Of all water-based tourist activities, bathing in the surf is probably the activity enjoyed by the largest group of people. Even though the surf on the Gold coast is relatively safe most of the time, inexperienced swimmers need to be directed and supervised in order to avoid unnecessary distress and loss of life. In Australia, surf life saving clubs (SLSCs) began to organise life guards for open beaches by the start of the 20th century. In 1999, the Gold Coast had 22 club houses lining its ocean beaches from Main Beach to Coolangatta (Map 13). At all club houses, fresh water showers and public toilets were provided for the general public (Table 6). 18 clubs also included restaurant facilities for club members and their guests. Food outlets or small shops selling snacks and drinks close to beaches on or around the clubs' premises were only available at 12 locations (Table 6). The number of FREE above-ground car parking spaces around surf life saving clubs varied considerably. The worst case was the Surfers Paradise SLSC with only around 15 metered car parking spaces in a 50 metre radius around its buildings. Burleigh Heads SLSC, on the

other hand, was located between two major public car parks, which provided more than 100 parking spaces in total.

Table 6
Surf Life Saving Clubs and Nearby Tourist Facilities

Name	Shower	Toilets	Food *	Restaurant	Car parking spaces
Southport	yes	yes	yes	yes	>50
Surfers Paradise	yes	yes	yes	yes	15
Northcliffe	yes	yes	no	yes	28
Broadbeach	yes	yes	no	no	~25
Kurrawa	yes	yes	yes	yes	~100
Mermaid	yes	yes	yes	yes	>50
Nobby's Beach	yes	yes	yes	yes	48
Miami	yes	yes	no	no	>50
North Burleigh	yes	yes	yes	yes	>50
Burleigh Heads	yes	yes	yes	yes	>100
Tallebudgera	yes	yes	no	yes	40
Pacific	yes	yes	no	no	20
Palm Beach	yes	yes	yes	yes	>50
Currumbin	yes	yes	yes	yes	>50
Tugun	yes	yes	no	yes	>50
Bilinga	yes	yes	no	yes	21
North Kirra	yes	yes	no	yes	~40
Kirra	yes	yes	yes	yes	>50
Coolangatta	yes	yes	yes	yes	>50
J. Cunningham Lifeguard	yes	yes	no	no	~40
Tweed Heads/ Coolangatta	yes	yes	yes	yes	~100
Rainbow Bay	yes	yes	no	yes	>50

For some sections of the open beaches lifeguards used small towers and 4WD cars as mobile rescue units to set up safe swimming areas for visitors and residents. In 1999, Gold Coast City Council provided 16 surf life saving towers in addition to those located next to club houses. The tower furthest to the north served the beach next to the sand bypassing jetty on the spit, while the last stand-alone tower to the south overlooked the Currumbin River mouth (Map 13). Although fresh water showers were available close to all these towers, only six had public toilet facilities nearby (Table 6). Food outlets and restaurants were only available at two locations. As for surf life saving

clubhouses, the number of car parking spaces free-of-charge varied considerably around these stand-alone towers. In the extreme, the were only 3 spaces for private motor cars at Hilda St in Mermaid Beach, but more than 100 on the Spit (Table 7).

Personal observations (J. Warnken) over eight years suggest that the number of available parking spaces had little effect in preventing parking problems. During peak holidays, i.e. after Boxing Day, areas around Southport and Burleigh Heads SLSCs filled up very quickly, while car parks at the Spit and opposite Seaworld have never been used to their full capacity. Smaller clubs, on the other hand, with only 20 to 25 parking spaces and no restaurant facilities were used to full capacity only on a few days during the holiday period, or only if special events (e.g. SLS carnivals) took place at these locations. The issue of sufficient car parking spaces along swimming beaches need further investigation, particularly in regard to the effects of the new 8-lane highway and its potential to increase visitors numbers.

Table 7
Surf Life Saving Towers and Nearby Tourist Facilities

Name	Shower	Toilets	Food *	Restaurant	Car parking spaces
The Spit	yes	yes	yes	yes	>100
Seaworld	yes	yes	no	no	~100
Marina Mirage	yes	yes	no	no	>50
Narrowneck	yes	no	no	no	>5
Higman St	yes	no	no	no	~40
Breaker St	yes	no	no	no	8
Staghorn Ave	yes	no	no	no	~40
Elkhorn Ave	yes	yes	yes	yes	30
Clifford St	yes	no	no	no	26
Wharf Rd	yes	no	no	no	20
George Ave	yes	no	no	no	~50
Hilda St	yes	no	no	no	3
Seashell Ave	yes	no	no	no	11
Fourth Ave	yes	no	no	no	20
Tallebudgera Ck	yes	yes	no	no	~50
Currumbin Pt	yes	yes	no	no	~100

Distances between surf life saving towers and clubs varied depending on suburbs and built-up areas along the beachfront. Considering the single tower at the spit as an outpost, Main Beach had

safe swimming areas next to towers and clubs at around 700 metre intervals. This distance almost halved (400m) for the Surfers Paradise to Broadbeach area. From there to Burleigh Heads, SLS towers and clubs were slightly further apart, i.e. 500m. The southern beaches of the Gold Coast are slightly more protected by the Coolangatta headlands that shield southern areas against the prevailing southeasterly ground swells. Consequently, SLS towers were fewer to the south of Burleigh Heads, and distances between guarded beaches increase to 1200m and 1800m for the Palm Beach and Tugun areas, respectively. Coolangatta, the first major tourist node on the Gold Coast, had SLSC facilities located at around 400m intervals, i.e. at similar distances as SLS towers and clubhouses in the Surfers Paradise to Broadbeach section (Map 13).

3.5.2 Boat and Ferry Terminals

Several cruise boats, parasail and fishing vessels, dive boats and water planes operate on or from the Broadwater. The greatest diversity, and probably the largest number, of operators used the Marina Mirage – Fisherman’s Wharf moorings as pick-up and return terminals for their customers (Map 13). One section of these moorings was constructed to include berths for seaplanes, which also used part of the southern Broadwater as landing strips.

Most cruise vessels, however, sail up the Nerang river to moorings at the western end of Cavill Mall near the centre of Surfers Paradise. These moorings included a transfer terminal from where passengers could be transported by bus to a small pier next to the bridge crossing the Nerang River from Southport to Main Beach. Cruise vessels too tall to clear the bridge used this pier. Another set of moorings located on the western side of the Broadwater close to Southport was used for a fishing charter vessel.

The latest addition in terms of passenger terminals for transfers by boat was set up by Couran Cove Resort P/L at Runaway Bay Marina to transport guests to their resort facilities on South Stradbroke Island. Part of the resort was built on stilts into a marina basin, which also includes a pier for landing passenger vessels. A similar facility exist north of the Couran Cove at Tipplers Resort where day trippers can get off their cruise vessels and enjoy the island’s resort facilities.

Most cruises use the deep channels in the Broadwater. This area is one of the busiest waterways in Queensland. Vessel counts conducted

on behalf of Queensland Transport, Maritime Division revealed 3169 vessel movements in the area on a single day in January 1999. Only fishing vessels take visitors out to the deep reefs off the coast where conditions are usually a lot rougher. Using a large racing yacht, 'Hammer of Queensland', for off shore cruises turned out to be not viable. The vessel was relocated to the Whitsundays in 1998.

3.5.3 Dive Sites

A phone survey of local dive tour operators revealed that the most popular dive sites were Wave Break Island near the western end of the Spit, and the 'Scottish Prince', a wreck of an old commercial vessel sunk off the beach slightly north of the Marina Mirage (Map 13). Tour operation alone account for about 2000 to 2500 dives per annum at these sites. Other sites require greater experience because of their depths or currents. Operators used these areas, i.e. the off shore reefs and the Tweed River for about 50–100 dives per year.

According to Wright (1990), other and even more exiting dive sites are located in Northern New South Wales, i.e. at Cook Island near Fingal Heads and at Julian Rocks off Byron Bay.

3.5.4 Areas of Waterways Used by Tour Operators and Vessel Hire Companies

Since the invention of parasailing and personal watercrafts (PWCs or jet skis), recreational use of waterways has increased sharply. Part of this increase can be attributed to tourist activities of either regional visitors who own a PWC, or tourists who hired such crafts during their stay at their principal destination.

On the Gold Coast, parasailing operators used the areas around the 'Deep Hole' north of 'Wave Break Island' for their parachute runs. Jet ski hire companies operated from removable pontoons in the southern area of the Broadwater, i.e. south of Break Water Island. Operators used small buoys to mark off safe areas between sandbanks and other user groups. In this way their area of operation remained flexible to make the best use of the area in different weather conditions. As a result, the areas highlighted as areas for water sports are only indicative and subject to change depending on normal physical processes, which alter depth profiles and boating channels in the Broadwater on a regular basis.

3.6 Major Tourist Traffic Nodes

General issues with motor vehicle traffic were highlighted and addressed by the *Integrated Regional Transport Plan* (IRTP 1998) under the *Regional Framework for Growth Management* (RFGM 1995) (and the *Gold Coast City Transport Plan* (September 1998)). In the following, some of these issues are highlighted from a tourist or traveller's point of view.

3.6.1 Travel to the Gold Coast

Most tourists arrived on the Gold Coast by car, plane or coach. The new rail link between Robina and Brisbane was mostly used by commuters who worked in one and lived at the other location.

In 1999, the area's principal airport, Coolangatta, was connected, either directly or indirectly, to all major areas in Australia and major cities in New Zealand. Most of the area's international visitors, however, had to disembark their aircraft in Brisbane and continue their journey by coach or taxi to get to their final destination. Several coach companies and Australia's two major airlines ran hourly airport shuttle bus services from any major accommodation facility to both airports and vice versa. Numerous limousine companies provided the same services by appointment to serve the upper section of the resort market. The situation could see some changes with the introduction of a new rail terminal at the Brisbane International Airport terminal. Due to the inconvenience of having to carry considerable luggage through the public transport system, it is likely that most international visitors will arrive on the Gold Coast using the Pacific highway – until Coolangatta Airport is upgraded to handle all international air traffic. The first move in this direction was made in 1999 under the airport's new master plan, which included development objectives for extending the existing runway and terminals to accommodate international charter flights (Gold Coast Airport Ltd 1999). In the meantime, the current upgrade of the Pacific highway to eight lanes could reduce travel times to the destination and give visitors a more impressive first glance at their final destination.

Visitors arriving at the destination by coach on major routes from other cities within Australia could disembark at four major bus terminals. From south to north these are located in Tweed Heads, at Conrad Jupiter's Casino in Broadbeach, near Cavill Mall in Central

Surfers Paradise, and at Railway Street in Southport. From there, visitors had to use taxis or shuttle buses to get to their accommodation premises.

For reasons of convenience, a large number of domestic visitors arrive by car. In 1999, the two major arterial roads for most of the area were the Gold Coast and Pacific highways. The latter one runs through the hinterland and has been upgraded between 1996 and 1999 to 4 to 8 lane motorway standard. The last section with traffic lights and intersections crossing the highway will be eliminated with the Tugun bypass, a new section of highway circumventing the Tugun – Coolangatta airport area (Map 14).

The main tourist areas, however, have to be accessed via the Gold Coast highway. During peak holidays, sections of this highway can be blocked with traffic congestion, particularly on the Southport to Main Beach Bridge, in Surfers Paradise, around Pacific Fair and in Burleigh Heads. Narrow roads in some areas of Surfers Paradise and Main Beach can make navigation and location of pre-booked accommodation facilities difficult. Parking, on the other hand should hardly be a problem: all international hotels, motels and condominium complexes provided undercover or underground parking spaces for at least one vehicle per unit. Only where two families or independent groups shared apartments, the second vehicle had to be parked in the street. Based on private observations (J. Warnken) while living in several of the Gold Coast's tourist areas, street parking became a problem only during peak holidays and only in areas where a lot of apartments were rented on a long-term basis. Apartments were often shared by several people who used private vehicles or company cars to get to work. These findings need to be substantiated by further research investigating profiles of visitors and residents in selected areas along the main tourist areas.

3.6.2 Travel within the Gold Coast

Visitors without cars had to rely on public transport to travel within the destination 'Gold Coast'. Except for the northern part of the Southport to Broadwater area, all major tourist areas were covered by the public bus system operated by a private company, i.e. Surfside Bus lines. During peak hours, buses stopped at 10 minute intervals at almost all stops along the Gold Coast highway. In general the service was maintained for most of the time in a 24 hours period and for most

bus routes along the main strip. Express services from major nodes along the beach strip to theme parks along the Pacific Highway were available at half-hour intervals in the mornings and afternoons.

Another alternative along similar routes was the Gold Coast Tourist Shuttle. Larger groups could hire a small van or coach from one of the more than 20 private bus charter companies registered on the Gold Coast.

Several smaller tour companies also offered tours into the hinterland. Their operations are discussed in a special section of the Hinterland Audit as part of the whole Gold Coast Visioning Project.

3.7 Shopping Facilities for Tourists

In our modern, post-Fordism society shopping has become a major recreational activity. At their holiday destination, tourists keep this habit. Even if most of their purchases are restricted to clothing, toys, sports items and souvenirs (due to transport problems), people in a holiday mood are often less rational in their decisions when, where and what to buy if compared to people in their normal environment. Purchasing at will can give a feeling of freedom from normal every day concerns about budgeting, bills etc. Therefore, shopping opportunities have become an integral part of the tourism product. Packaging these opportunities into a pleasant atmosphere can provide memorable experiences of the whole holiday and the destination. For most of the beach resorts, shopping has also become one of the important recreational activities during bad weather. As a result, most modern resorts contain shopping arcades either directly within their resort precincts or in nearby shopping centres.

3.7.1 Duty Free Shopping

Orchid Avenue in Surfers Paradise and the southbound section of the Gold Coast highway between the ANA Hotel and the Watermarks Hotel were aligned with small or medium size souvenir and duty free shops. Other duty free purchasing opportunities were available in shops located in the 'Marina Mirage', at 'Conrad Jupiter's' and other sections of the Gold Coast highway. Here, shoppers could purchase products, which were considered bargains made from 'inexpensive' raw materials produced in Australia: opals, leather goods, wool products, surf wear, etc. Many of these shops used Japanese or

Chinese characters on their advertising signs. This practice has attracted criticism in the past – particularly by supporters of the ‘One Nation Party’ during the last Federal Election, which was in turn commented upon by overseas travel agents. The area with the highest concentration of such signs was Central Surfers Paradise.

3.7.2 Non Duty Free Shopping

By the end of 1999, 26 shopping centres operated on the Gold Coast. As mentioned under section 2.2, Beenleigh was excluded. Investigations with senior management personnel and observations over 8 years (J. Warnken) revealed 14 of these being frequently visited by tourists. The first eight of these listed in Table 8 represented shopping centres that were primarily used by tourists. All apart from the ‘Sanctuary Cove Marine Village’ were located close to the beach in one of the major tourist areas (Map 15). On average, these shopping facilities were smaller in both, precinct area and numbers of shops, if compared to the second set of facilities in Table 8, i.e. mixed tourism-residential shopping centres. These latter represented major facilities used by residents and tourists alike. ‘The Pines’ at Elanora was the only one in this group where management personnel considered income from tourism minimal compared to business originating from visits by residents.

Table 8
Shopping Centres on the Gold Coast Frequented by Tourists

NAME	Opening year	Precinct area [m²]	Shops	Cinemas
ANA Galleria and Shopping Centre	1985	10168.3	45	No
Dolphin Centre	1986	14495.9	40	No
Marina Mirage	1988	22188.0	n.i.	No
Niecon Plaza	1990	2430.1	30	No
Paradise Centre	1980	16143.5	130	No
Raptis Plaza	n.i.	6243.5	n.i.	No
Sanctuary Cove Marine Village	1988	69730.5	60	Yes
Show Case on the Beach	1988	21120.2	60	Yes
Australia Fair	1990	40459.6	225	Yes
Harbourtown	1999	235537.7	140	No
Oasis	1989	14815.6	130	No
Pacific Fair	1977	166534.1	260	Yes

NAME	Opening year	Precinct area [m ²]	Shops	Cinemas
Robina Town Centre	1996	1097654.6	220	Yes
The Pines	1989	85981.9	85	No

Based on the two types of shopping centres suggested in Table 8, it could be maintained that all centres primarily used by tourists opened between 1985 and 1990, i.e. before and during the major development boom in the late 1980s. The number of mixed tourist-residential shopping centres on the other hand, grew from 1977 to 1999 (the time of this study). The largest one in regard to shops, 'Pacific Fair', has been expanded and rejuvenated in 1982 (1st 'Myers' store), 1992 (new arcade off 'Myers'), 1996 (cinema complex) and 1998 ('Daimaru' store). Similar activities though at a smaller scale occurred in and around 'Australia Fair' (cinema complex, opening of the Mall), and at the 'Oasis' (beachfront works, changes to the northern section of shopping complex).

Shopping centres primarily used by tourists were less prone to major rejuvenation works. Adding the 'Hard Rock Café' and opening the middle section of the 'Paradise Centre' were the only activities comparable to works undertaken for mixed tourist-residential shopping centres.

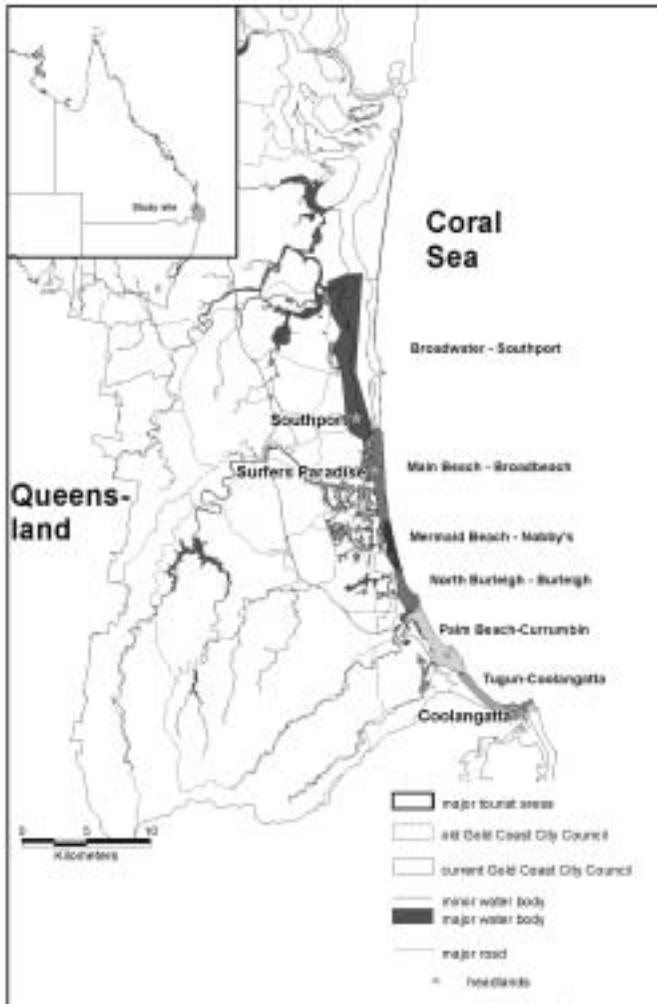
Visual inspections of major tourism shopping facilities also revealed that, except for the 'Marina Mirage' complex, notable green themes or water themes were not included in shopping centres on the coast. Smaller areas planted with shrubs and trees were found in the 'Australia Fair' and 'Pacific Fair' precincts. This was a little surprising, because the area's warm subtropical climate is ideal for open designs and the use of large trees and water displays. In fact, several of the larger centres had open courtyards, but most of their floor areas were sealed with tiles, bricks or concrete, which left only a few pot plants in designated corners.

Most of the major tourist shopping facilities within the Gold Coast's major tourist areas were almost 10 years old or older and had little room for major structural changes. Although individual shops were refurbished on a regular basis, the overall design, layout and architecture of the overall centres reflected their age. Whether this constitutes an impediment to attracting more tourists is a matter of further studies.

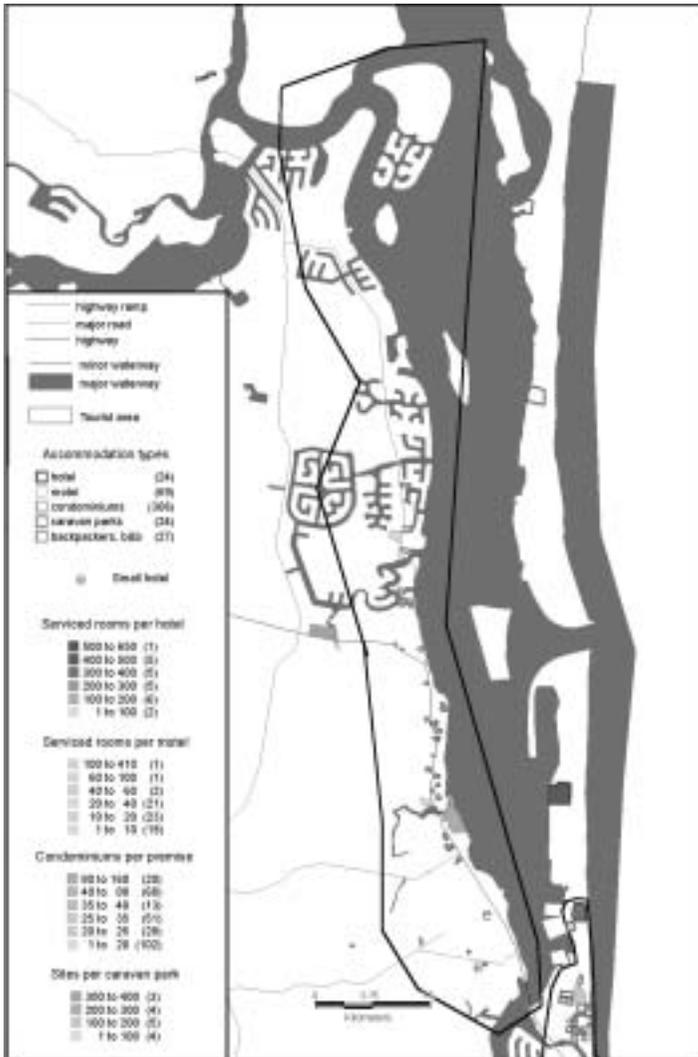
Because shopping opportunities can become a key asset for a destination, it is also important to investigate how the Gold Coast's

current facilities compare to those in other major destinations in the Asia-Pacific region, e.g. Hawaii, and to those available to international tourists in their country of residence. Even with the latest addition, a new tourism shopping centre east of Chevron Island to be opened in 2000, there seemed to be no major new shopping centre theme, concept or landmark added to the Gold Coast's existing facilities.

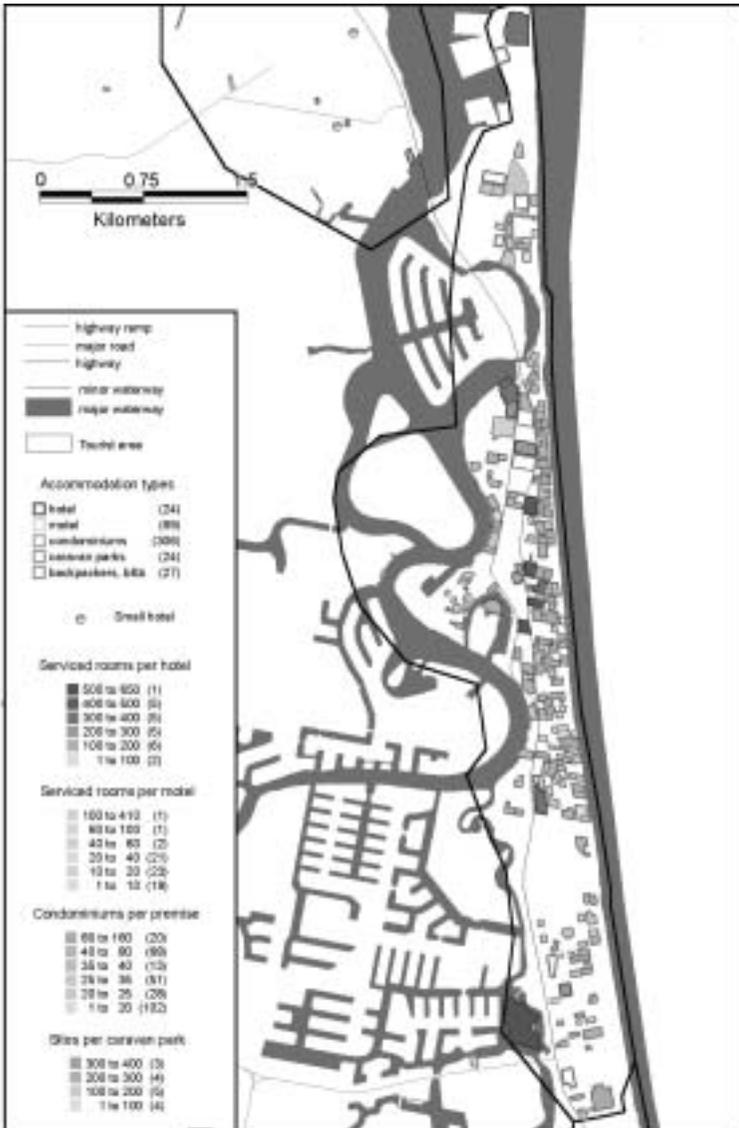
Appendix A



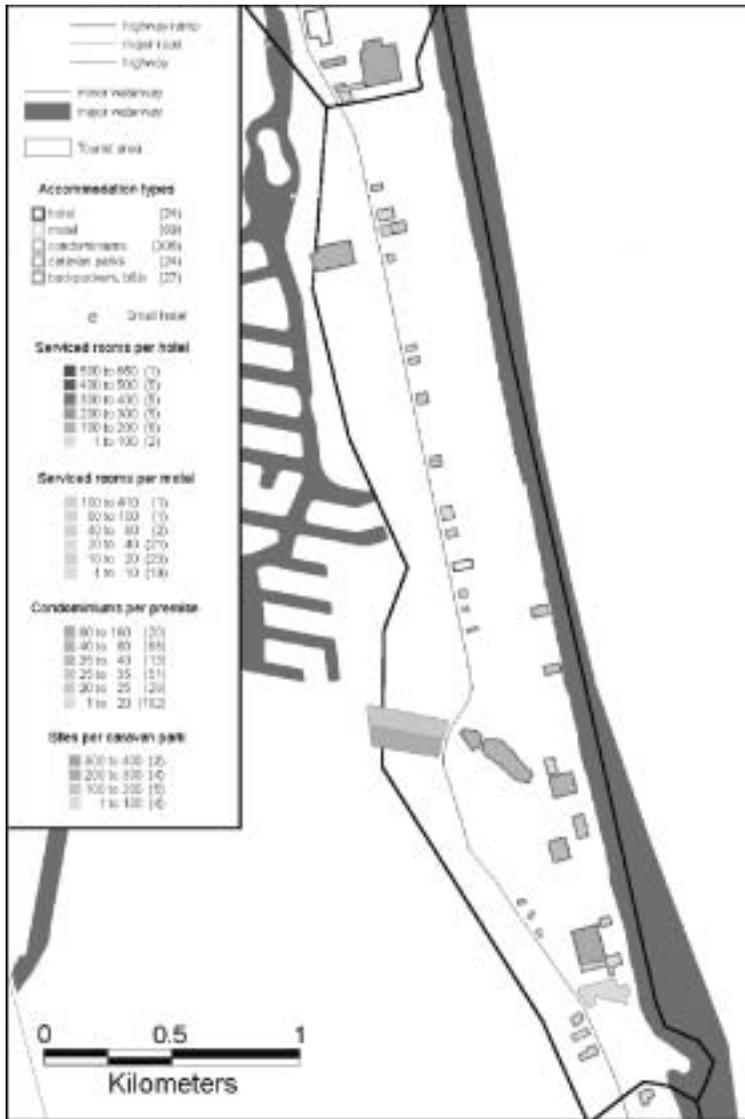
Map 1
Location of Tourist Areas



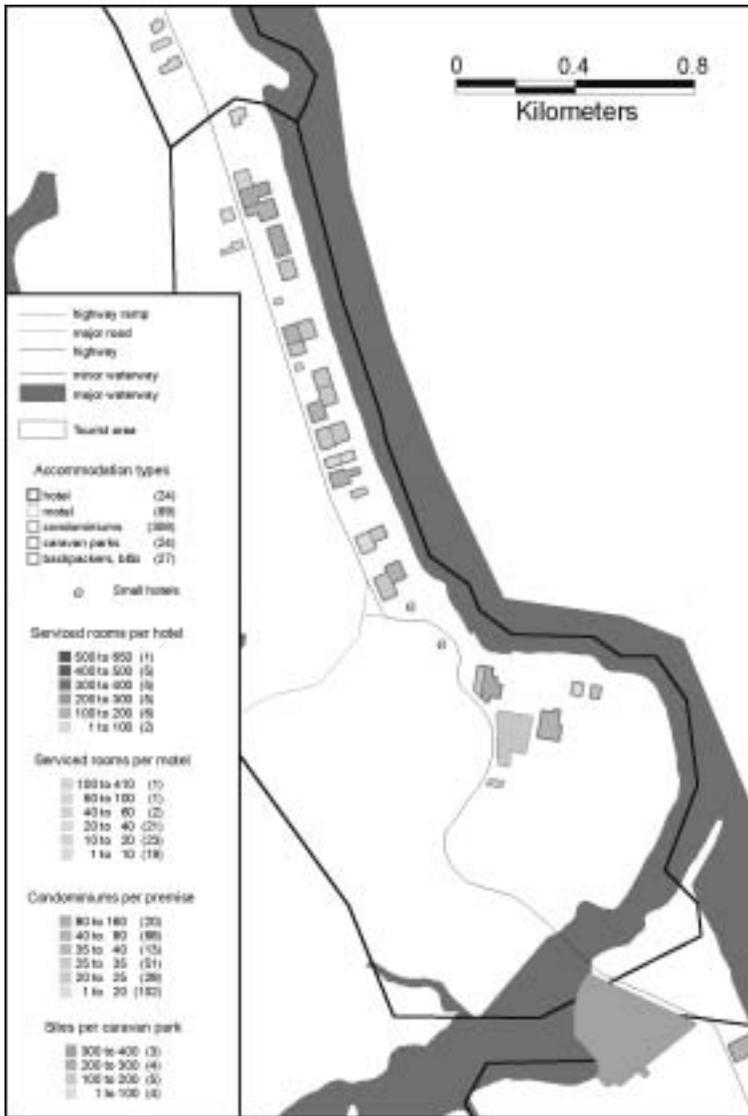
Map 2
Accommodation Providers in the Broadwater to Southport
Tourist Area



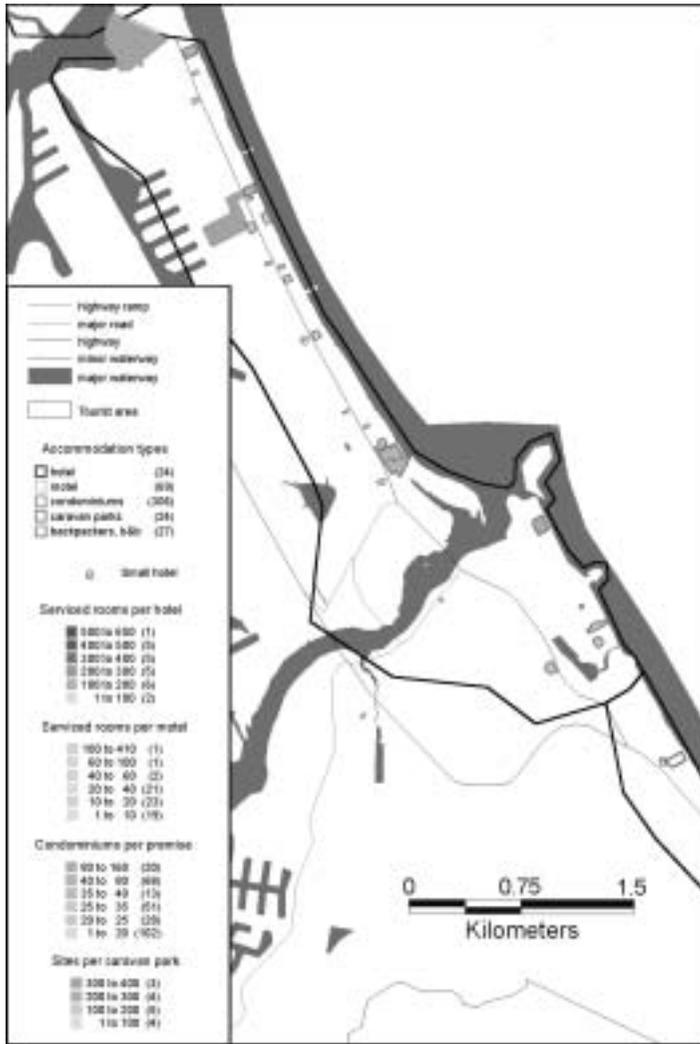
Map 3
Accommodation Providers in the Main Beach to Broadbeach Tourist Area



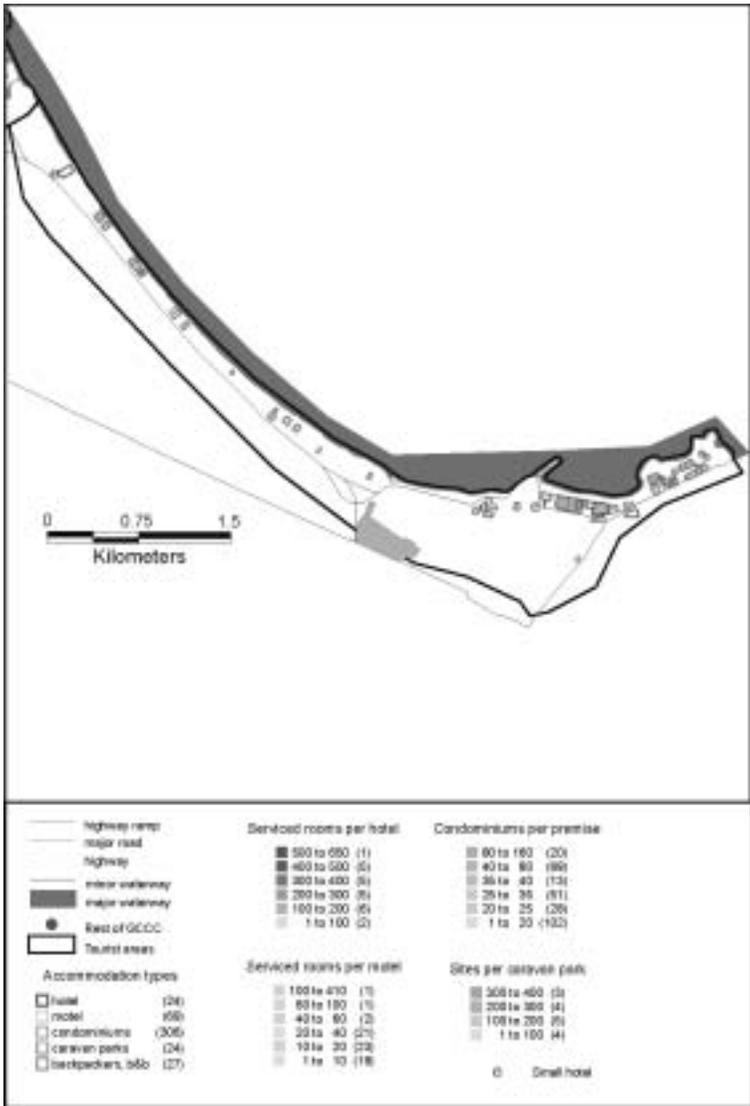
Map 4
Accommodation Providers in the Mermaid Beach to Nobby's Beach Tourist Area



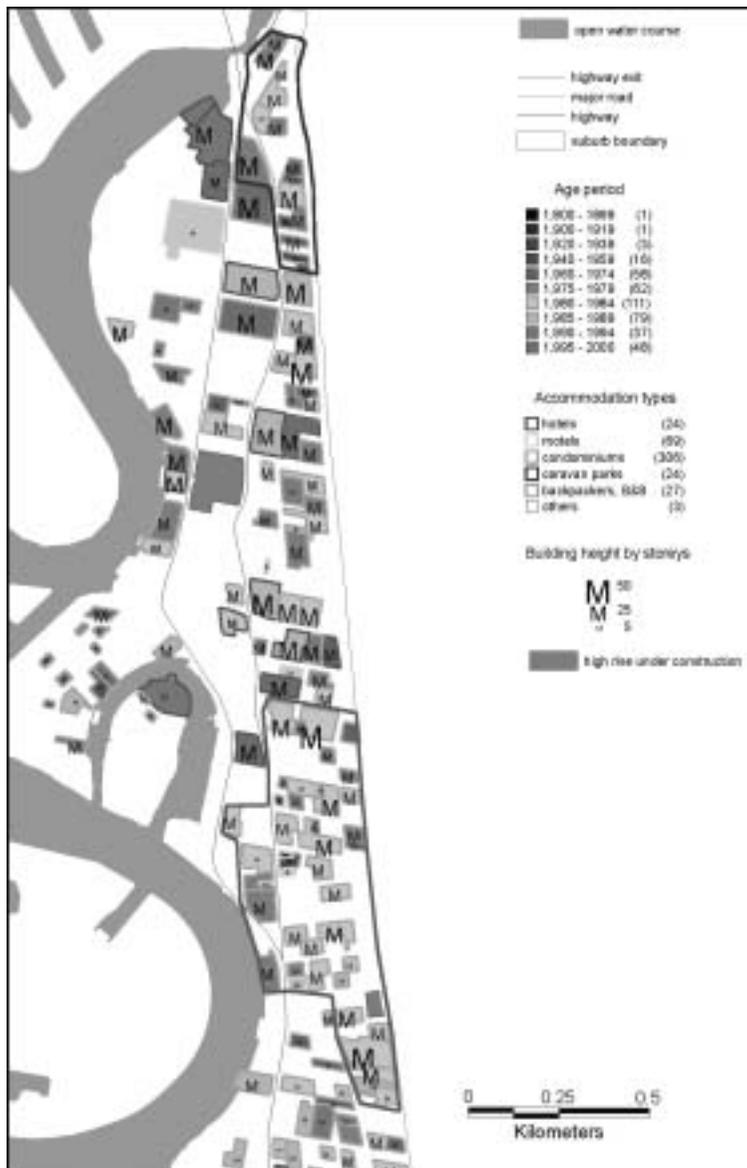
Map 5
Accommodation Providers in the North Burleigh to Burleigh Heights
Tourist Area



Map 6
 Accommodation Providers in the Palm Beach to Currumbin Tourist Area



Map 7
Accommodation Providers in the Tugun to Coolangatta Tourist Area



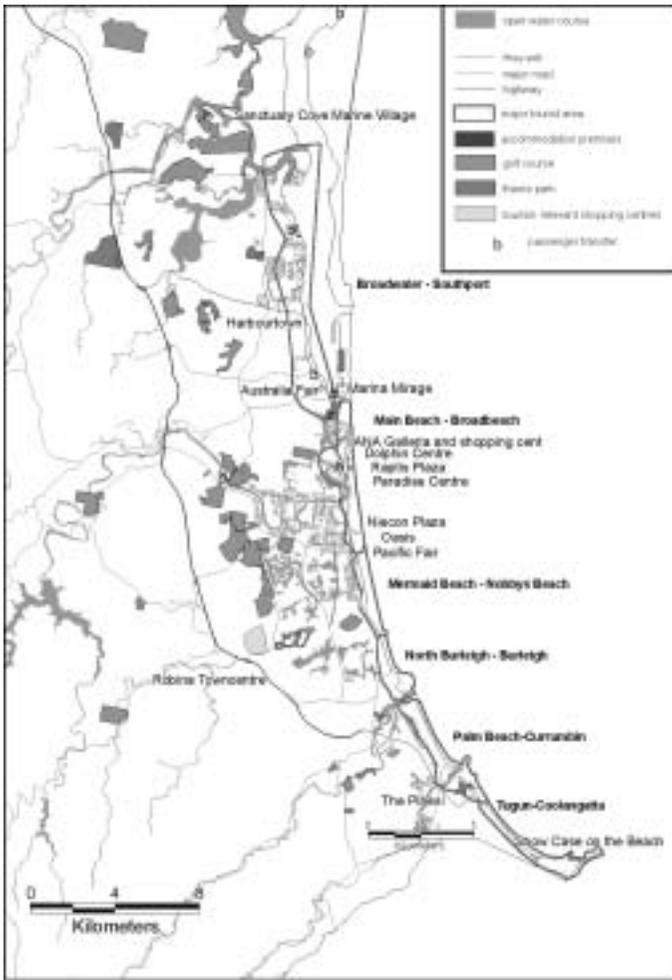
Map 8
Areas with High Risk Accommodation Development



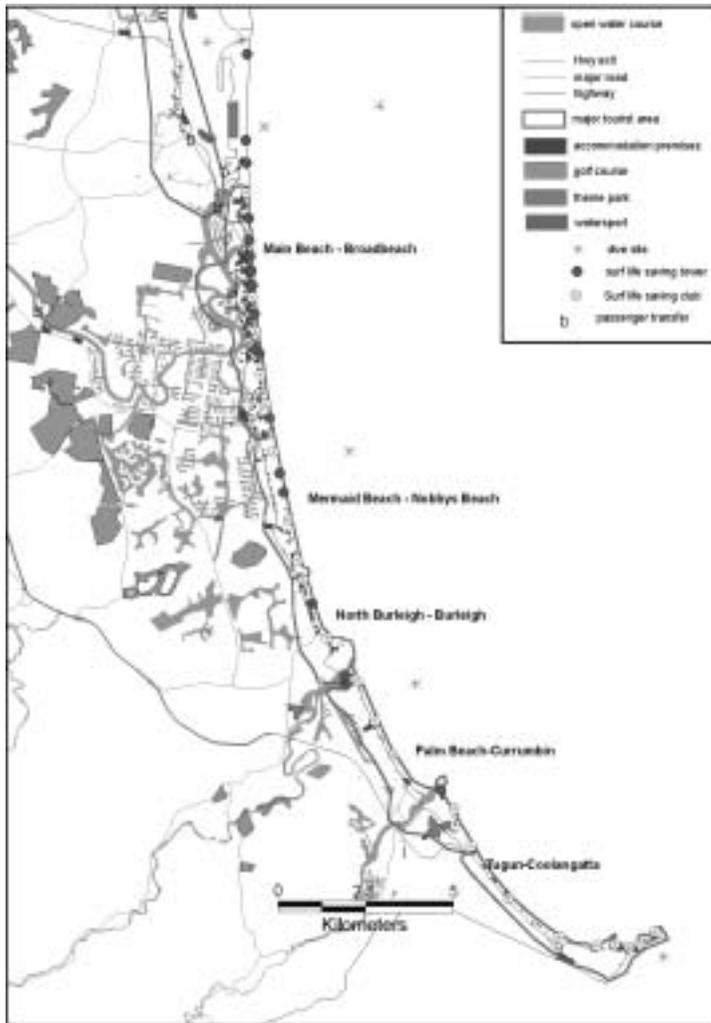
Map 9
 High Risk Accommodation Developments in Northern Surfers Paradise



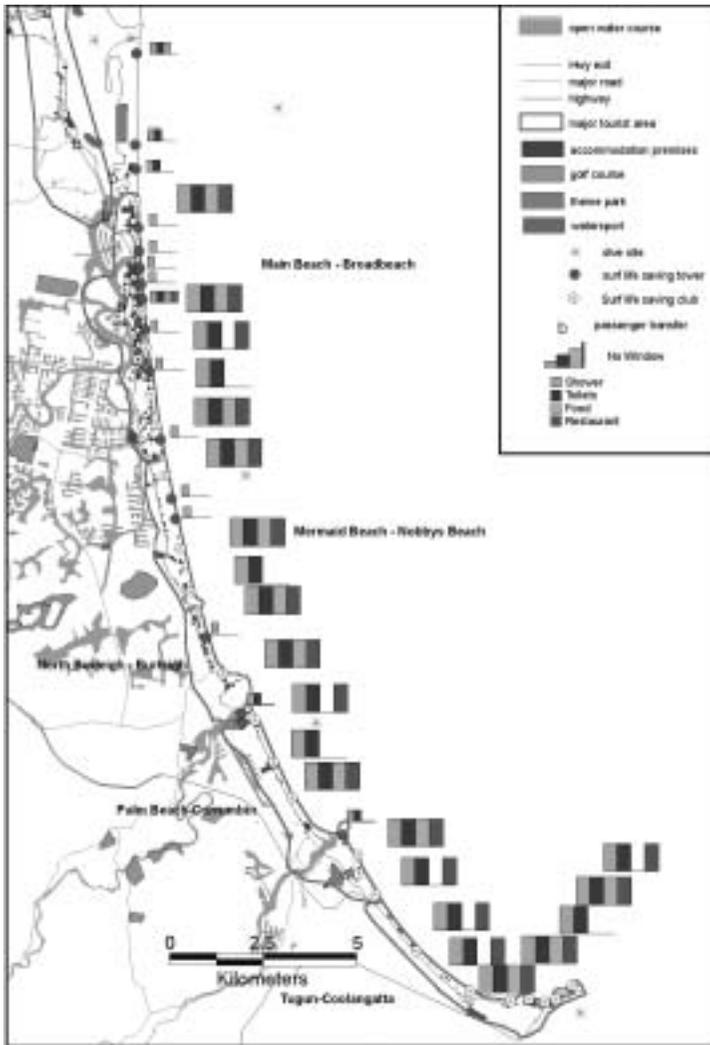
Map 10
 High Risk Accommodation Developments in Southern Surfers Paradise



Map 11
Locations of Theme Parks, Golf Courses and Shopping Centres

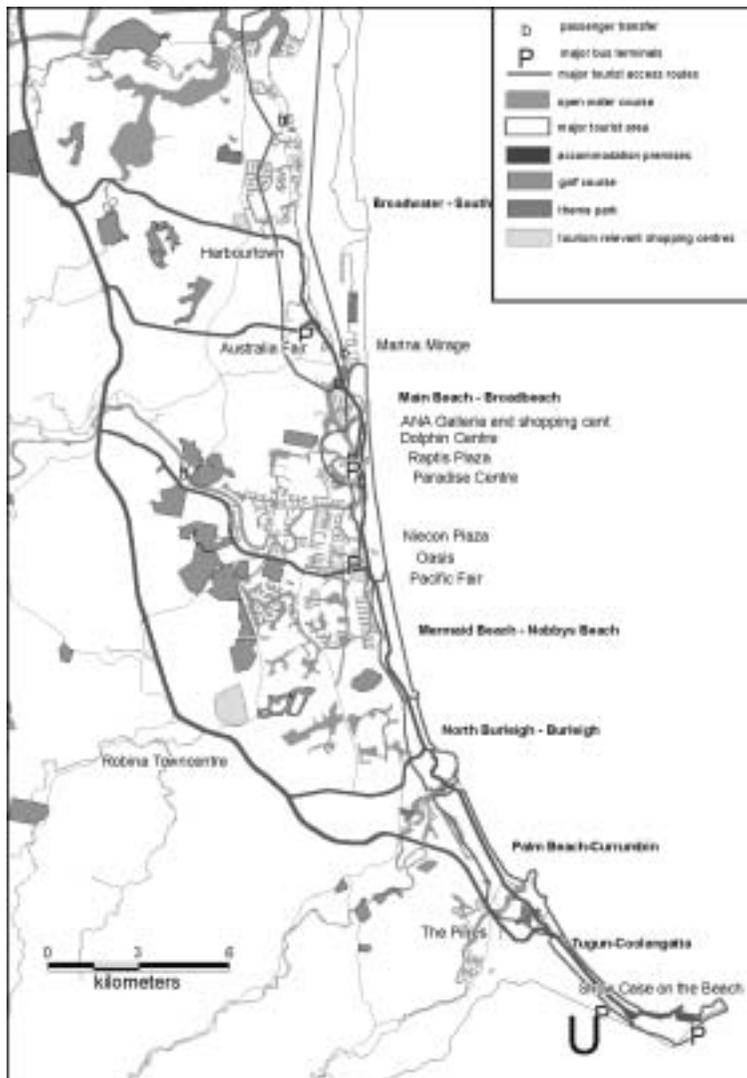


Map 12
Recreation Facilities in the Gold Coast's Major Tourism Areas

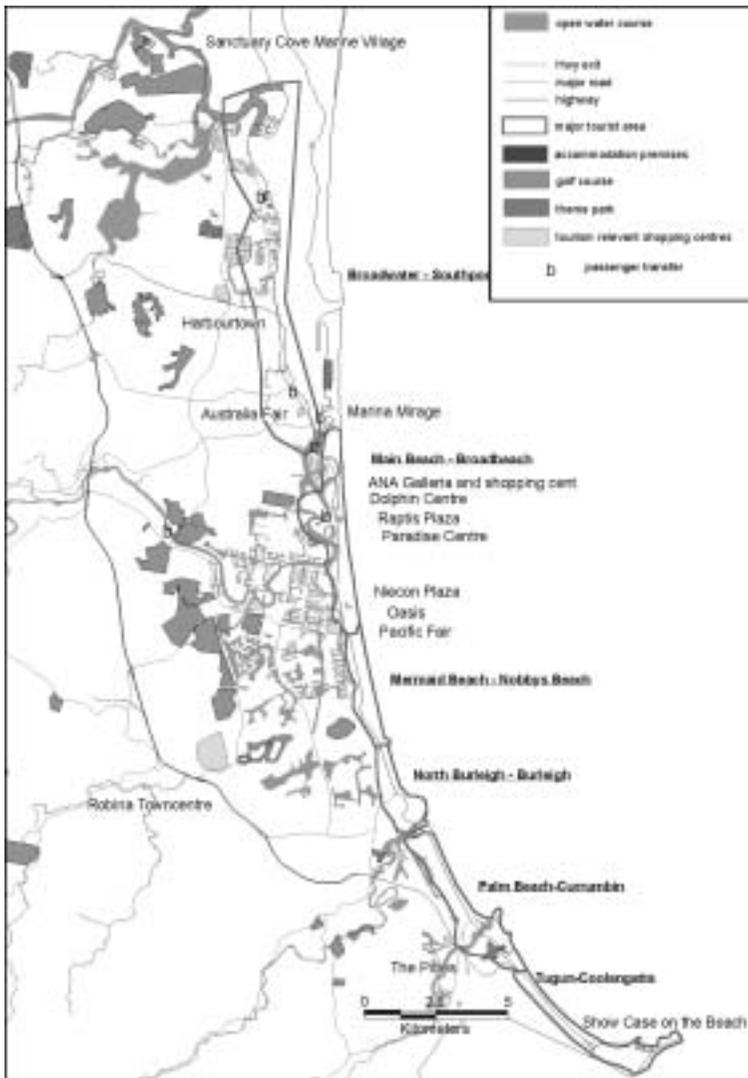


Map 13

Location of Surf Life Saving and Associated Facilities



Map 14
 Major Traffic Infrastructure



Map 15
Locations of Major Shopping Centres

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The Gold Coast Tourism Visioning Project

Cooperative Research Centre for Sustainable Tourism

The Gold Coast Tourism Visioning project articulates a set of core values and principles that underpin a preferred future for the sustainable prosperity of Australia's leading tourism destination in the medium to longer term (10 to 20 years). It challenges destination Gold Coast to move from a past ad hoc approach to tourism to one that integrates economic, social and environmental dimensions to evolve new patterns of managing and growing tourism in a more systematic and dynamic way in this new century. Tourism is a key component of the inevitable transition to sustainable development strategies in advanced western democracies such as Australia.

Through this Gold Coast Tourism Visioning project, the local tourism industry has an opportunity to confirm itself as part of the solution, rather than as a contributor, to the economic, social and environmental challenges of the future.

With the assistance and support of numerous public and private sector organisations and individuals, a team of interdisciplinary researchers built the knowledge foundation for the leading-edge Gold Coast Tourism Visioning Project. The project has created a more strategic perspective towards tourism policy, planning, development and marketing involving the process of visioning – a technique combining the setting of a 'vision' and 'planning'.

It had its origins in the late 1990s, when a number of Gold Coast tourism's key stakeholders recognised that the relationships between business, government and community, which had enabled the Gold Coast to flourish in the past, were changing and the destination was confronted by a new range of challenges. Many of these challenges are shared with maturing destinations the world over.

The tourism visioning project has provided a vehicle for advocating long-term change in the overall approach to tourism by all stakeholders concerned with the creation of a sustainable, prosperous tourism industry for the Gold Coast. Cooperation and collaboration at all levels between various stakeholder groups must override fragmentation, confrontation, internal competition and a lack of an agreed common long-term focus. A new vision for tourism is required in what has been – and can continue to be – Australia's most successful tourism destination.

If the Gold Coast is to continue to provide us and our visitors with the lifestyle experience for which we are known, then we must aim high, plan long and settle for nothing but sustainable excellence in all facets of OUR GOLD COAST.

The vision is in our hands, but can we see it?

Grant. R. Bowie, Chair, Gold Coast Tourism Bureau, 2002



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