

10. Whole of City Planning

This section looks at planning and policy issues across the whole of Gold Coast City. This includes a Strengths, Weakness, Opportunities and Threat Analysis (SWOT Analysis), a review of the global and local trends which provide an outlook for Gold Coast City's tourism industry, an overview of Gold Coast City's strategic market position, and the whole of city priorities for tourism. Attached to the priorities is an indication of those areas within council who are responsible for the implementation of each priority.

10.1 SWOT Analysis

A SWOT analysis provides an opportunity to impartially assess the competing operating environment.

Strengths

- Gold Coast City's lifestyle
- Size and diversity of tourism products, attractions, accommodation and tourist experiences
- High level of awareness and profile in international and domestic visitor markets
- Proximity to Brisbane (less than one hour)
- Clean environment which has urban, coastal and forest landscapes
- Emerging sectors of the economy, including the education, health and medicine, marine, film and multimedia, sport, technology, environment and food industries
- Reputation as a leading tourism destination
- Attractiveness for hallmark events
- Community support for tourism development
- Iconic surf beaches and skyline
- Sub-tropical climate
- The headquarters of a world-leading tourism research organisation, the CRC for Sustainable Tourism
- Gold Coast Airport and improvements to the city's airport infrastructure and services
- Gold Coast Convention and Exhibition Centre (to be completed in 2004)
- Entrepreneurial investment culture in city
- Size and profile of the tourism industry



Weaknesses

- Misperception of Gold Coast City, particularly in southern states of Australia that Gold Coast City is just Surfers Paradise, too touristy, and only sun and surf
- Transport access issues, including road access from NSW in the south and congestion within the city, and limited airline access due to Gold Coast Airport's runway length and air traffic curfew
- Limited direct international air services
- Proximity to Brisbane
- Disjointed approach to tourism planning and management issues
- Concentration on accommodation infrastructure development
- Undersupply of cultural tourism product and experiences
- Limited awareness about tourism experiences in the Gold Coast City Hinterland
- Reliance on fine weather experiences

Opportunities

- New and innovative tourism product and icons
- Nature-based tourism in the Gold Coast City Hinterland and coastal regions
- Integrated transport system, including self-drive, public transport and private operators
- Hinterland/scenic rim linkages
- A proactive events strategy
- Growth of leisure focused airlines and international air services
- Niche market development
- Innovative retail experiences
- Destination management approach to tourism planning and development
- Heighten community support and awareness of the importance of tourism to the city
- Increased awareness of food and dining experiences in Gold Coast City
- Emphasise the link between beach culture and Gold Coast lifestyle
- Establish a holiday seaport to accommodate cruise ships, boutique ships, super yachts, and leisure craft
- Greater sophistication in body corporate management
- Develop cultural and lifestyle orientated tourism products in the city
- Use of walkways to encourage pedestrian exploration of Gold Coast City
- Pacific Highway upgrade (most notably the Tugun Bypass of the Pacific Highway)
- Gold Coast Convention Centre and growth in business tourism in the city

Threats

- Uncoordinated approach to tourism development and planning
- Urban sprawl
- High volume, low yield markets
- Failure to manage the carrying capacity of the Gold Coast City's environmental assets leading to environmental degradation
- Absence of a disaster and crisis management plan for tourism
- Loss of major events
- Crime and safety problems
- Community concerns about tourism
- Lack of innovative, world-class tourist product and infrastructure
- Insurance issues
- Population growth
- Remaining competitive to relation to other tourist destinations, both in Australia and overseas
- Removal of Gold Coast City icons which have a tourism value
- Aging accommodation infrastructure and potential oversupply
- Water supply



10.2 The Gold Coast City Tourism Outlook

There are several challenges for Gold Coast City's tourism industry over the next five years. Challenges will come from changes in the local, national and international economic, social and environment fabric of society. These challenges are integrated into the strategic thinking to develop this strategy.

Challenges in the Worldwide Tourism Marketplace

Changes in the global environment challenge the way the Gold Coast City's tourism industry plans for future tourism development. The World Tourism Organisation (WTO) predicts that world tourism markets will grow at 4.1 per cent (as a percentage of total travelling population) from 1995 to 2020³¹. Several mega (or worldwide) trends will have a significant impact on the Gold Coast City's tourism industry³².

Key mega trends include:

- **Rapid population growth of the world** - Booming populations in developing countries and declining populations in developed countries will result in an overall growth in the world's population.
- **Increased immigration and multi-culturalism** - The population imbalance will be partly offset by immigration from developing to developed countries, resulting in increasingly multi-cultural societies.
- **Escalating environmental degradation and urbanisation** – The growing world population will put increased pressures on natural and manmade resources. Consequently, failure to manage this growth will result in environmental degradation. At the same time, more people will live in cities.
- **War, safety and disease concerns** - These issues will be increasingly critical due to population growth resulting in resource shortages and economic polarisation. Communication efficiency will allow the global village to share ideas and issues, but different people/cultures may not share the same opinions and values, which may lead to conflict.
- **Aging population** - Changes in the birth rate, most notably the baby-boomer phenomenon, has caused a major shift in the age profile of the population towards a greater number of older people. This shift will have a major effect on the behaviour of society, not just for older people, but also for all age groups.

Implications:

- **Economic prosperity** will lead to segments of the market having more disposable income to spend on higher-value products.
- **Ageing "Baby Boomers"** will have the time and money to spend on holidays. Particular areas of interest are expected to include recreation and leisure experiences, educational experiences and ageing-friendly products and services.
- **Women** will have greater input into purchase decisions, such as travel.
- Travel will become more **individualised for the experienced traveller**, with a greater emphasis on unique and different experiences.
- **Ecotourism, nature-based tourism, and cultural and heritage tourist experiences** will become increasingly popular.
- **Niche markets**, in particular health and wellness tourism and the youth and seniors markets, will grow.

On September 11 2001, the world was shocked by the events that unfolded in the United States. Just a few days later on September 14, Australians were further stunned by the collapse of Ansett. A year later, the Bali bombings (on 12 October 2002) brought these tragedies much closer to home. These events had a significant immediate impact on Australia's tourism industry. While the Gold Coast's tourism industry fared well, it was not unaffected by these events.

In the medium to long-term, the threat of terrorism is likely to affect people's travel behaviour. Most people are changing their travel plans to safer destinations that are closer to home and more familiar³³. Given the Gold Coast's strength in the domestic marketplace, this represents a potential opportunity for the city.

On the international front, Australia is perceived by most of the world as a safe destination. While the threat of terrorism may deter international visitors from air travel, the overwhelming desire to travel means that countries such as the United States, Asia, Hong Kong/China and Singapore are still willing to travel to Australia.

Tourism Queensland commissioned Roy Morgan Research to undertake research into the impacts of September 11 and the Ansett Collapse³⁴. The survey results indicated that:

- Australians would continue to travel, but feel safer doing so within Australia.
- 69 per cent of Australians who were planning to travel in the next 12 months had changed their plans.
- 90 per cent of Australians felt safe traveling in Australia, whilst 64 per cent felt safe about overseas air travel.
- Of the 36 per cent who felt unsafe about overseas air travel, 72 per cent were concerned about terrorism, whilst 27 per cent were worried about flying during wartime.

Ansett's collapse had a significant impact on Australian tourism, particularly in the Japanese market. The loss of the daily 747 service from Osaka to Brisbane and Sydney resulted in SEQ losing almost 3000 seats a week out of Japan³⁵. However, the introduction of Australian Airlines in October 2002, flying from Japan to Tropical North Queensland with direct connections to Gold Coast City, is expected to assist in recapturing the Gold Coast City's Japanese market.

Overall, Gold Coast City's tourism industry has weathered the storm of these events reasonably well, mostly due to a robust domestic market. It is expected that, notwithstanding another major international event, the Gold Coast City's international markets will recover over time. On the domestic tourism front, Gold Coast City is anticipated to be a major beneficiary as Australians tend towards taking their holidays within their home country.

Challenges in the Domestic Tourism Marketplace

Domestic tourists are critical to the Gold Coast City's tourism industry. Since 1997, the Gold Coast has outperformed the national average in the domestic marketplace³⁶. Tourism growth for the Gold Coast City will come from international markets, but the size will continue to come from domestic tourism³⁷. Therefore, challenges facing this market are of central importance to maximizing domestic tourism outcomes for the city.

An analysis of the travel habits of Australians in general revealed that many Australians are not taking their full annual leave entitlements. In 1999, 30 per cent of working Australians took no holidays at all, while a further 43 per cent did not take their full holiday entitlement.

Some of the key reasons identified for this trend include:

- Time poverty,
- A changing work culture,
- No longer a job for life; and
- Job insecurity.

In November 2000, the "See Australia" campaign was launched as a joint initiative among state and federal governments, and industry partners. The aim of this initiative is to stimulate growth in domestic tourism. In other words, it plans to encourage Australians to take their holidays and see Australia³⁸.

At the same time, the advent of leisure friendly no frills airlines, such as Virgin Blue, Impulse, and Freedom Air, has halted the restrictions on airline capacity to the Gold Coast. These airlines operate on a much lower cost base and are more profitable on the lower yielding leisure routes than full service airline.

With initiatives to encourage domestic tourism (like "See Australia") and the growth of leisure friendly airlines, the aim is to stimulate Australians to take time-out from work (preferably to visit Gold Coast City). Through continuing to make Gold Coast City an attractive place for Australians to holiday, there is a significant opportunity to further expand domestic visitation to the city. The overarching aim is to encourage Australians to take a holiday in their own backyard – Gold Coast City.

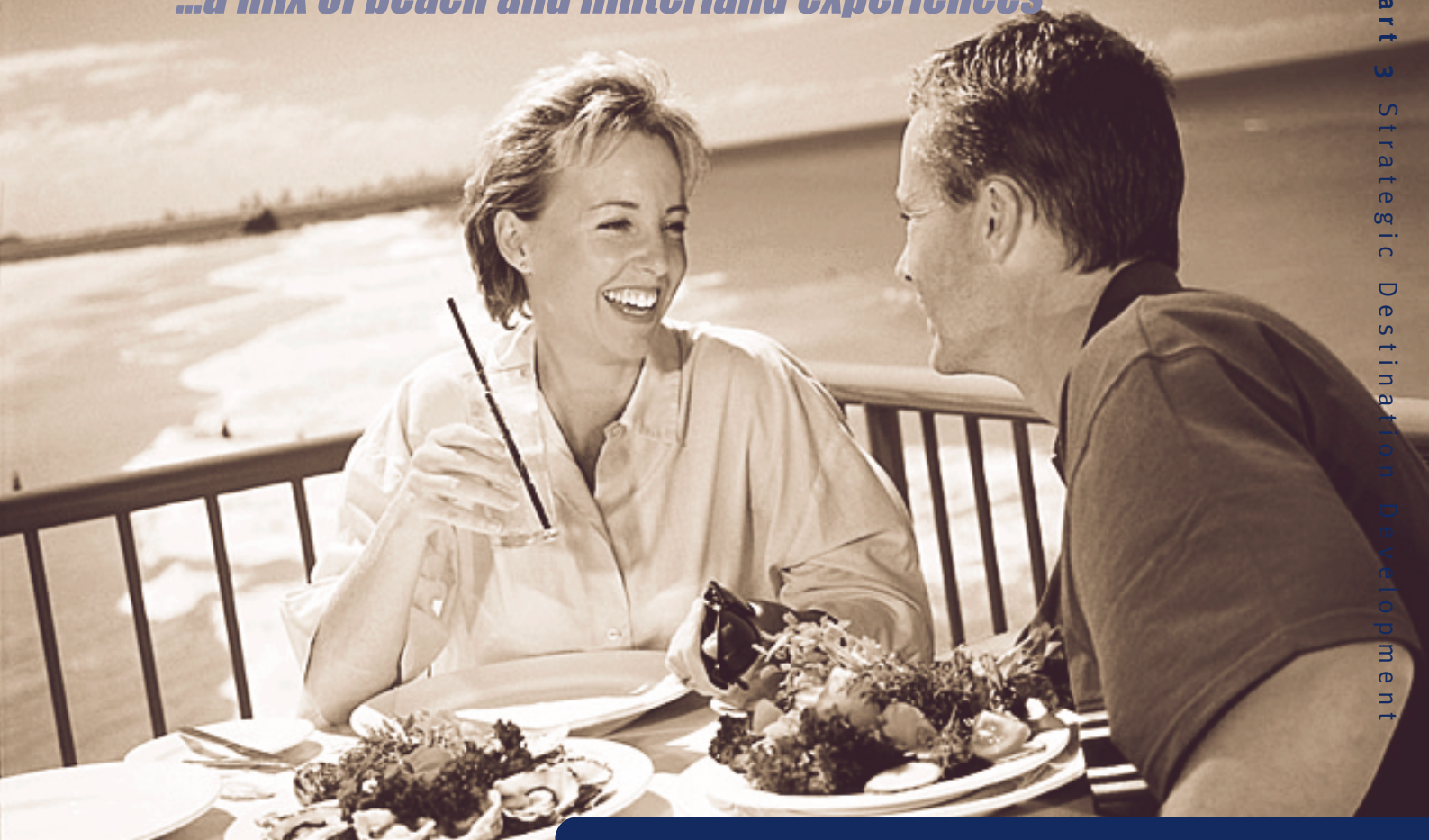


Challenges in the Local Tourism Marketplace

Locally, there are several key issues that Council and the Gold Coast City's tourism industry must consider over the next five years. These issues have been integrated into the strategic thinking to develop this strategy.

Key considerations:

- Growth in tourism numbers combined with the ever-increasing population of Gold Coast City and SEQ in general.
- Competition between alternative land uses, most notably residential development.
- The predicted growth in emerging international markets (particularly China).
- Hinterland nature-based activities will become increasingly popular, and therefore significant to Gold Coast City's tourism product.
- The completion of the Gold Coast Convention and Exhibition Centre resulting in an increased emphasis on business travellers to the city.
- New and innovative tourism product will be important to maintain the Gold Coast City's competitive position as Australia's leading tourist destination.
- There will be increasing pressure on the city's environmental assets (particularly the beaches and forests) making ecologically sustainable tourism practices and environmental management fundamental to the Gold Coast City's success as a tourist destination.
- The Internet and information technology will change the way business is done.
- Tourism infrastructure, particularly airports and to a lesser extent sea ports, and the value of the rail and road networks and public transport networks, will be fundamental to optimising tourism growth for Gold Coast City.
- Repeat visitation and the ability to correctly identify and target niche markets will become increasingly important to the city.
- Use of scarce resources (i.e., water).



10.3 Strategic Market Position

In simple terms, the decision to travel for a holiday, to visit friends and relatives or for business purposes is often made according to a desired experience. Therefore, the attractiveness of a tourist destination is often dependent upon awareness of the destination, its image and how that image meets the needs of the traveller. The success of a tourist destination (like Gold Coast City) is often dependent upon the ability of the planners to develop tourism product, infrastructure and communication strategies that project an alluring image and provide a satisfying experience congruent with tourists' needs. So, what do visitors to Gold Coast City desire?

Research in domestic and international tourist markets provides some key insights into the desires of these visitors^{39,40}. These findings formed an integral part of the strategic planning for this strategy and the future role of Gold Coast City within Australian tourist product. Below is a broad overview of some of the desired activities domestic and international visitor markets are seeking. More detailed analysis (which informed this strategy) is available from Council's Tourism Branch.

Domestic tourists to Gold Coast City are seeking...

- Interesting, novel experiences which demonstrate that Gold Coast City offers new and different tourist experiences.
- A mix of beach and hinterland activities - Gold Coast City boasts excellent beaches and rainforest combined with shopping, dining and theme park opportunities unlike any other tourist destination in Australia.
- To go surfing, relax on the beach, and enjoy swimming and sunbathing.
- To relax in a natural environment, partake in sightseeing, bushwalking, and visit the rainforests.

- To participate in water-based adventures, such as snorkelling, diving, white-water rafting, fishing and cruising the canals.
- Experiences that involve quality, value for money eating, drinking and dining.

International tourists to Gold Coast City are seeking...

- Escape from the pressures of everyday life.
- The opportunity to see the natural scenery and interesting wildlife.
- First-class beaches.
- Good value for their holiday dollar.
- Australian food and wine experiences.
- High-quality, varied and unique dining experiences (whilst mindful of their particular cultural preferences)



Challenges for Gold Coast City's Tourism Product

As identified by the Gold Coast Tourism Visioning Project, there are several challenges facing Gold Coast City's tourism industry. Some of these include:

- The environment that enabled Gold Coast City to flourish in the past has changed. Gold Coast City's tourism industry has matured, therefore no one single tourism development (such as a resort or theme park) can dominate the city's tourism industry like it had in the past. Innovative tourism product and infrastructure is needed, that is linked to strategic marketing, to rejuvenate the city as a premier tourism destination⁴¹.
- A fragmented, ad hoc approach to tourism planning and product development in Gold Coast City is not sustainable⁴².
- Environmental planning should become integral to tourism planning as tourism product becomes increasingly focused on nature-based experiences, particularly on the beaches, in the hinterland and along the waterways⁴³.
- Coupling the beaches with the hinterland in a novel way is important to capture domestic markets⁴⁴.
- In general, international markets desire quality natural scenery, good beaches and interesting wildlife. However, cultural differences mean that how Australians seek to experience the Gold Coast City differs from how international visitors want to experience it. Therefore, these preferences need to be reflected in the tourism product created⁴⁵.
- Offering unique and attractive experiences to visitors that ideally fit their preferred activity bundle is critical to the continued success of Gold Coast City's tourism industry. However, each market has difference desires, therefore the products and communication messages need to be different to reflect the desires of each market^{46,47}.
- Food and wine tourism product in Gold Coast City is emerging, and requires further development.
- An over-reliance on inclusive tour markets and the erosion of margins has contributed to a high volume, low yield accommodation problem in Gold Coast City⁴⁸.
- Most shopping centers in the city were built in the real estate booms of the 1980s. Although the interior of the shopping centers is regularly updated, the principal design and architecture remains unchanged. These factors need to be considered in the context of sustaining a competitive tourist destination⁴⁹.
- The quality of Gold Coast City's tourism product, in particular major attractions such as theme and wildlife parks, in the international marketplace needs to be considered⁵⁰.
- In the domestic marketplace, the quality of the accommodation, beaches and restaurants in Gold Coast City are the most important contributors to overall visitor satisfaction⁵¹.
- Hinterland tourism product requires major investment, mostly to access the site. Commercial operation of specialist recreation in this area (such as hang-gliding, rock-climbing, mountain-bike riding) exists, however often these operators are combining their hobbies with a commercial interest. A more comprehensive, professional focus to tourism product development in this area is needed⁵².



Gold Coast and Australia's Tourism Brand

Gold Coast City's destination marketers are the Australian Tourist Commission (ATC), Tourism Queensland (TQ) and the Gold Coast Tourism Bureau. Together, they undertake the branding and marketing of Gold Coast City. These agencies engage in tactical communication campaigns to build the overall image and position of the Gold Coast City in domestic and international tourist markets. The destination is characterised as carefree, fun, friendly, active, entertaining, warm and confident. According to TQ, Gold Coast is positioned as:

A beach holiday destination which offers families and couples more fun and entertainment than any other destination.



An international visitor's perception of the Gold Coast is built upon their perception of Queensland, and to a greater extent, their perception of Australia. The ATC is the international destination marketer for Australia. The ATC's tourist brand is known as Brand Australia. It positions Australia in international tourist markets as a "Naturally Free Spirited" place which is based on a combination of: Australia's spectacular natural environment, the distinctive personality of the Australian people and the free spirited nature of the country's lifestyle and culture. It aims to promote a personality where:

Australia is a free spirited, optimistic, fun and liberating destination offering a range of experiences.



Our Tourism City aims to complement the destination marketers' positioning of the Gold Coast, Queensland – and by extension Australia - in order to provide integrated tourism outcomes for the whole of Gold Coast.

For further information on the Gold Coast's tourism positioning go to: www.tq.com.au/destination/goldcoast

For further information on Brand Australia go to: www.atc.net.au



Gold Coast City's Tourist Experience

From a strategic perspective, Gold Coast City must differentiate itself from its competition and provide interesting and compelling experiences for tourists. Some simple pointers to assist the development of tourist products for tourism have been developed. These pointers reflect the Gold Coast tourism brand and the findings of the Gold Coast Visioning project. It will also form the basis for directing Council's approach to tourism product over the next five years (2002-2007).

Gold Coast tourism product should be...

- Gold Coast lifestyle experiences
- Nature-based experiences, such as beaches, rainforests and wildlife experiences
- An opportunity to engage with the local community, meet local characters and experience local hospitality

- An escape to a sub-tropical getaway
- A premier shopping and dining experience
- A break free from the everyday through themed, fun, novel and innovative experiences

Gold Coast tourism product should not be...

- Too touristy
- Only sun and surf experiences

The marketing position analysis, combined with the SWOT analysis, provides the framework for the whole of city approach to Our Tourism City. It also informs the sectorial planning outcomes outlined in Section 12.

10.4 Priorities and Implementation

Table 3: Whole of City Priorities & Implementation

Whole of City Priorities	Principal Responsibility	Providing Assistance	Corporate Plan Outcomes
1. Implement a program that encourages the development of fresh, innovative tourism product and infrastructure in Gold Coast City that reflects the City's strategic advantages in the tourism marketplace and the desires of visitors to the city.	Tourism	Tourism Taskforce	Diversify and Strengthen: Increase export development
2. Develop a world-class harbour for Gold Coast City that reflects economic, social and environmental best practice.	Special Planning Projects	Tourism Taskforce; EDMP	Growth Management: Appropriate public infrastructure is available for sustainable development through efficient use of resources
3. Implement an on-going program of tourism research in partnership with the CRC for Sustainable Tourism and other stakeholder groups.	Tourism	Tourism Taskforce; EDMP	City Image: Improve national and international connections, with a focus on trade, investment, education and tourism
4. Implement a tourism business development process that provides a one-stop-shop for liaising with Council regarding new tourism business start-up and development applications.	Tourism	Economic Development	Customer Service: Seamless response to customer requests
5. In partnership with the Gold Coast Airport and their Master Plan, develop a Gold Coast Aviation Plan that investigates the potential to extend the Gold Coast Airport's infrastructure and targets additional airline services to the City; opportunities to leverage these developments for Gold Coast businesses also needs to be investigated.	Tourism	Economic Development	Growth Management: Timely provision of infrastructure consistent with community standards
6. In recognition of Gold Coast City's beaches and foreshores as prime tourism assets, establish a beach and foreshores infrastructure allocation.	Beaches & Watercycle Infrastructure	Tourism; Community & Rec. Services	Preserve and Enhance Environment: Healthy catchments, waterways and beaches.
7. Utilise government tourism and trade networks and sister city relationships to inform ideas on new tourism product, infrastructure development, build airline services, investment attraction, and create new export and trade opportunities for Gold Coast City.	Tourism	Economic Development	City Image: Improved national and international connections, with a focus on trade, investment, education and tourism
8. Build-on the city's established tourism brand to create a parallel business brand for the Gold Coast (Innovation City) and leverage Gold Coast City's awareness as a tourist destination to assist the City's economic development activities.	Economic Development	Tourism; Marketing	City Image: An accurate and consistent national and global profile and image of the Gold Coast