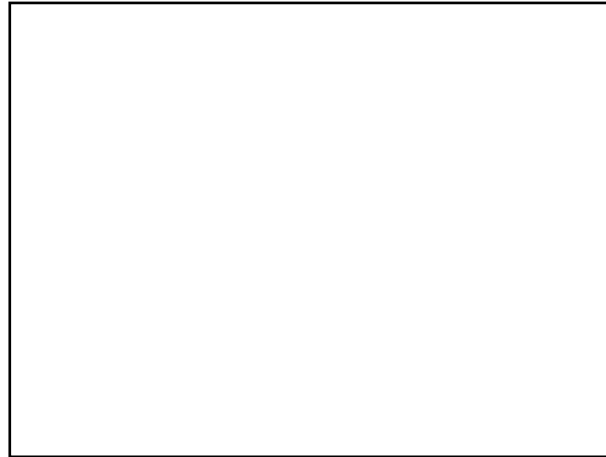


**TOURISM DESTINATION DEVELOPMENT –
BEYOND BUTLER**



A thesis submitted for the degree of
Doctor of Philosophy
at The University of Queensland
in December 2005

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Candidate's Statement of Originality

I declare that the work presented in this thesis is, to the best of my knowledge and belief, original and my own work, except as acknowledged in the text. The material has not been previously submitted in any form for a degree at this, or any other university.

Noreen Breakey

Acknowledgments

First and foremost I would like to thank my supervisor, Associate Professor Bob Beeton. His vision, enthusiasm, and support guided me through the various stages of this process. I could not imagine having undertaken the PhD journey without him. In addition I wish to thank my associate supervisor, Louise Horneman, for her practical and detailed suggestions in the early PhD work.

Along the PhD journey I have been fortunate to receive the love and support of my partner, Darren, and my family and friends. I thank them all for enduring the long hours and dedication required to complete this work. Special thanks go to my wonderful mother, who matched her support to my changing needs as the work progressed.

I thank Dr Bill Carter for organising the initial ‘oldies’ PhD group - Dona Whiley, Noel Scott, and Richard Bramley. I thank these friends, as well as the newer members, Robyn Stokes, David Taylor, Glen Hornby, Pallavi Mandke, and Petra Singer, for their invaluable support and informed input. In particular I wish to thank Dona Whiley who understands the challenges in balancing the PhD with the ongoing commitments, expectations, and crises in life. In addition to helping to ensure that my methodological underpinnings and unit of analysis were clarified, I would like to thank Noel Scott for recommending me to the Corporate Planning Department at Tourism Queensland where I was able to become practically involved in destination management and planning for the tourism destinations of Queensland.

I also thank the support staff at the University of Queensland, the many and helpful library staff; Laura and Julie from Student Support Services; as well as Lyndelle and the other staff of the School of Natural and Rural Systems Management.

Finally, I would like to dedicate this work to my precious niece, Anika, and nephew, Kellen, who as part of the next generation will experience the world and visit, or not visit, the destinations we create and manage today.

Abstract

My thesis is that the nature of a tourism destination is not predestined as proposed by destination life-cycle models. Instead tourism destination development is continually determined by the internal conditions and inter-relations within the tourism destination system, and the combination of external impacts acting on the destination.

The most popularly applied theory employed to explain tourism growth within a destination is the life-cycle concept (Butler, 1980). Although the life-cycle model does offer a general and adjustable means for describing past destination change, it does not consider tourism as a complex and dynamic system. This work illustrates that alternate theories also offer important concepts for understanding change within a tourism destination, including Evolutionary Theory, Punctuated Equilibrium, and Chaos Theory.

While none of these four theories completely explains how and why change occurs within a tourism destination system, each offers concepts that can be incorporated into the proposed model that outlines the possible change options and their magnitude, the Multi-Trajectory Model of Tourism Destination Change. This model proposes that the growth pattern of a destination variable may at times be in a state of complete 'equilibrium', undergoing gradual positive or negative 'evolutionary' change, or within a 'chaos' induced 'punctuation' causing an immediate, and substantial increase or decrease in growth. The underlying premise of this proposed model is that change can occur at any time, and can be in any direction. Therefore tourism is a system that includes most expressions of change theory in a temporally complex way.

The proposed model raises three Research Issues. The first was that, although tourism change can be analysed at various levels, area aggregation results in data smoothing. Secondly, tourism destination change cannot be explained by total yearly visitor numbers alone. Finally, there is no predetermined pattern of tourism destination development. This provides a new approach to examining change at a destination.

In order to test the model, a tourism destination system was chosen as a case study. This multi-level system incorporates the tourism destinations of the three local areas of Noosa, Maroochy, and Caloundra, the Sunshine Coast region they comprise, the State of Queensland, and the Nation of Australia. This case system provided the opportunity to compare the same data variable at the different levels, determining whether or not the local area followed the patterns of change evident at the regional, State, and/or National levels. The use of the three local areas also allowed for comparison, considering whether tourism developed in similar ways and at similar times across the local areas, and whether external influences had similar impacts on the local level destinations or whether the responses differed. Additionally, the inclusion of the higher aggregate levels provided information on the environment in which with a lower level destination operates and develops.

The qualitative investigation into the history of the development of tourism within this multi-layer system identified reasons why tourism has developed and changed in the case study area. While providing a context for the time-series data analysis, this historical examination also showed just how many factors affect tourism development, thereby reinforcing the need for a model that incorporates this complexity.

The focus of the time-series data analysis was on the patterns of change evident in data variables, considering the trajectories and change points within each pattern. An important aspect of this approach to understanding tourism destination change was the inclusion of multiple data variables, both tourism specific, and general growth indicators. Analysis of possible relationships between the variables added greater depth to the study. Testing such a model required the collection of a significant body of time-series data, its analysis, and presentation.

Investigation of the first research issue revealed that under the smooth aggregate patterns of the higher level data variables there exists an interesting array of complex patterns. This analysis provided a more detailed picture of the change in both individual variables at the different geographical levels, as well as sub-categories within a variable, such as visitor numbers. This study illustrates the need to consider the underlying variables to ensure greater understanding of the complex change within a destination. Also important was the inquiry into the remaining research issues. This showed that there is no single pattern which represents the destination's change. Various patterns exist, such as for visitor spending,

occupancy levels, and the supply of accommodation. This challenges the notion that a destination will simply follow the life-cycle pattern. As the Multi-Trajectory Model of Tourism Destination Change embraces this variation, complexity, and dynamism, the model explains the differing change trajectories of tourism destination development identified in the various geographical levels of the case study data.

The general aim of this study was to further understanding of how and why tourism destinations develop. In the future this knowledge will benefit tourism businesses, associations, managers, and planners. Ultimately, tourism destination planners need to accept that destination growth is not a simple and predictable process. The Multi-Trajectory Model of Tourism Destination Change can be applied to understand the change at a destination. Such understanding can then be used to develop a framework for the planning of strategic intervention, which therefore allows for management of change. This could assist in redirecting tourism development to ensure it is economically, environmentally, and culturally sustainable through the facilitation of an environment conducive to positive change.

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List of Abbreviations

ABS	Australian Bureau of Statistics
ALP	Australian Labor Party
ANA	Australian National Airways
ANTA	Australian National Tourism Association
ATC	Australian Tourist Commission
ATIA	Australia Tourism Industry Association
BTR	Bureau of Tourism Research
CBD	Central Business District
CEDA	Committee for Economic Development of Australia
CPI	Consumer Price Index
CRC	Cooperative Research Centre
DTM	Domestic Tourism Monitor
EIA	Environmental Impact Assessment
EIS	Environmental Impact Statements
GDP	Gross Domestic Product
IUCN	International Union for Conservation of Nature and Natural Resources
IVS	International Visitor Survey
LAC	Limits of Acceptable Change
LOWESS	LOcally-WEighted Scatterplot Smoother
MAPE	Mean Absolute Percentage Error
MSRP	Major Survey Research Programme
NEPA	National Environmental Policy Act
NSW	New South Wales, Australia
NTA	National Tourism Administration
OESR	Office of Economic and Statistical Research
QGTB	Queensland Government Tourist Bureau
QTDB	Queensland Tourist Development Board
QTTC	Queensland Tourist and Travel Corporation
QVS	Queensland Visitor Survey
PLI	Plant Location International
PWA	Price Waterhouse Associates

ROS	Recreation Opportunity Spectrum
R-TAM	Regional Tourism Activity Monitor
SD	Statistical Division
TAA	Trans Australian Airlines
TQ	Tourism Queensland
UNCED	United Nations Conference on Environment and Development
UNCHE	United Nations Conference of the Human Environment
UNEP	United Nations Environment Programme
US	United States (of America)
WCED	World Commission on Environment and Development
WTO	World Tourism Organisation
WTTC	World Travel and Tourism Council
WWI	World War One
WWII	World War Two
WWF	World Wildlife Fund

Chapter 1 The Development of a Tourism System at a Destination - An Introduction

1.1 Overview of Chapter One

This study arose from my interest in tourism destinations¹. I had worked for over a decade in a variety of industry positions, operations, and environments. I was interested in the way that destinations evolve and the impacts of tourism induced changes on both the local community and the natural environment. When this study commenced in September 1999 I felt that planning and managing tourism destination development sustainably required an understanding of how destinations develop and change generically. The seminal work of Butler (1980), combined with the industry report by QTTC and Boeing (QTTC & Boeing, 1981), and the more recent works of Prideaux (1998; 1999a; 2000), Russell and Faulkner (1999), and Carter (2000; 2004), suggested that a strategy would be to understand the role of entrepreneurs and regulation in the shaping of tourism destinations². This in turn would allow for the directed development of 'better' destinations that would ensure social, environmental, and economic sustainability. This was consistent with my belief that people should be able to experience, but not destroy the wonders of this world.

Initially I assumed that in the past, provision of tourism experiences often occurred within planning systems that emphasised development and commercial success, but which gave limited consideration to the environmental and socio-cultural dimensions of a destination. I hypothesised that this often resulted in negative impacts for the local people and the natural environment.

¹ **Destination:** "as distinct from origin or market, refers to the place where tourists intend to spend their time away from home. This geographic unit visited by tourists may be a self-contained centre, a village or town or a city, a region or an island or a country" (Cho, 2000).

² Recently I have become aware of the forthcoming double volume on The Tourism Area Life Cycle by Richard W. Butler in the Aspects of Tourism series. Neither I, nor my supervisor, have been able to obtain a copy prior to submission with the books currently on order at the University of Queensland library. This dissertation is therefore presented in ignorance of this material.

Today tourism is increasingly incorporated into national, regional, and local level planning, and new approaches and thinking are developing. As knowledge of the manner of tourism destination development³ accumulates, I assumed that it would become possible to determine the type and level of tourism activity appropriate⁴ for a developing destination, and to plan, direct and control development accordingly. Such an informed approach to the future of tourism destinations would aim to meet the needs of the local community⁵ and the tourists, with the sustainable use of the local resources, thereby ensuring the financial viability of the tourism industry.

As the work progressed, I became aware that the way tourism destinations change⁶ is not understood and is far from predictable. In retrospect the proposed models⁷ of destination development from the early 1980s (Butler, 1980; QTTC & Boeing, 1981) can be seen as artefacts of scale as they provide a theoretical pattern of overall destination growth at the macro level without the fluctuations, changing trends, and seasonality found at the more detailed micro level (Figure 1.1).

Such models were useful in the early stages of tourism research and represent the orientation of research at that time. The way the models were developed summarised the tourism destination phenomenon. Consequently the applicability of the models is limited as they smooth over significant events and periods of stability and rapid growth, which when summed create the tourism destination's overall pattern of growth⁸.

³ **Development** can be both the process of developing, as well as a specified state of growth or advancement (Pearsall, 2001). Development in this context is usually associated with progress and may be contrasted with directionless or regressive change (Calhoun, 2002). It often involves the process of converting land to a new purpose by constructing buildings or making use of its resources (Soanes & Stevenson, 2003).

⁴ **Appropriate Tourism** requires that the type and scale of tourism is considered suitable for an area in view of its economic, social, environmental, and other conditions (Medlik, 1997).

⁵ **Local Community** - A group of people who are socially related by virtue of identity with a particular location (Bradbury, 2003). However this does not imply that all the locals in a community share the same beliefs, culture, ideals, and way of life. Therefore ensuring the needs of the local community are met is problematic as the needs vary, for example, between old and new settlers.

⁶ **Change** - In its general application, change is an act or process through which something becomes different (Soanes & Stevenson, 2003). Such a difference is not necessarily 'development'. In addition the change may be a positive and/or negative difference depending upon one's view.

⁷ **Model** - A representation of some phenomenon of the real world made in order to facilitate an understanding of its workings (Mayhew, 1997). In general, for practical reasons, a number of simplifying assumptions must be made which limit the extent to which a model truly represents actual conditions, the time period over which any conclusions are valid, and the application for which that model may be employed (Dunlop, 2001).

⁸ **Pattern of Growth** - The pattern generated by a variable that is plotted on a graph as a function of time. The pattern thus illustrates the growth of the variable. This may be used to show the growth of a population, sales of a product, etc (Butler et al., 1997).

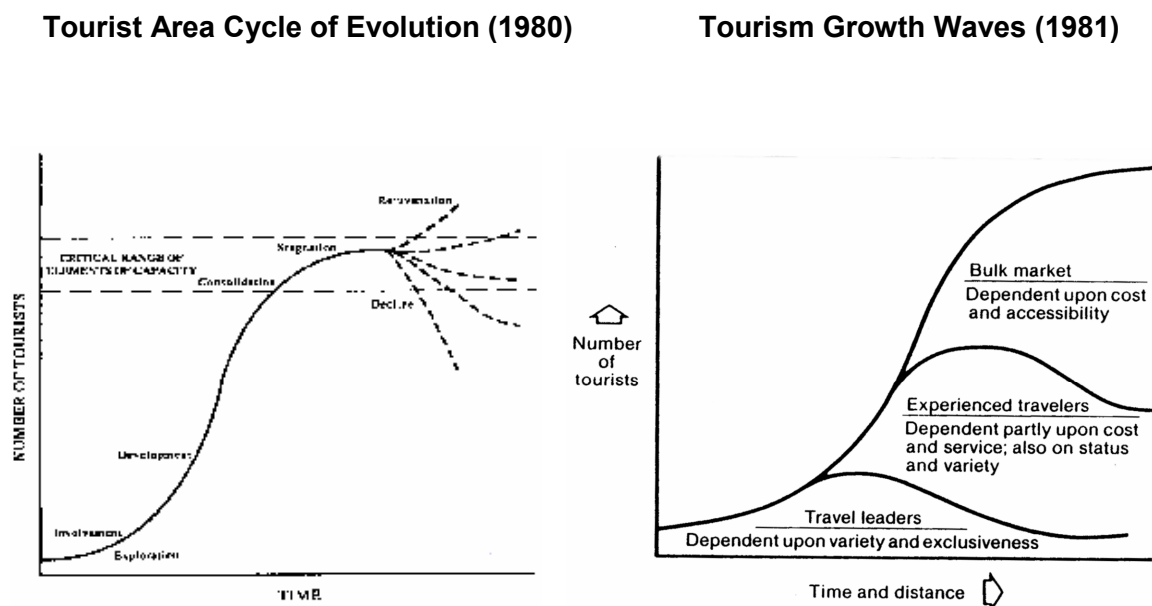


Figure 1.1 The Early Tourism Destination Growth Trend Models of the Early 1980s. Butler's Tourist Area Cycle of Evolution Model (Butler, 1980), and Tourism Growth Waves (QTTC & Boeing, 1981).

Ultimately my study evolved with the changing literature to become one of developing and addressing appropriate questions about the complex change processes that when combined result in overall destination growth⁹. Thus the aim of the work became: **to increase understanding about the ways tourism destinations develop**. Ultimately this knowledge could assist planners in achieving the goals for a destination. One such goal is 'classical' sustainable tourism¹⁰ (Section 1.2.3), but there are clearly other goals that are sustainable when the balance between environment, economy and society is differently defined. This is an important distinction. I will argue that tourism is a system that interacts with the wider economic and social systems. Further the system can be understood and affected. Consequently, although the outcome of an areas' tourism development can be planned, the 'final' point is socially constructed, and there is no single formulation of the sustainability goal.

⁹ **Growth** - In its general application, growth is the process of increasing, in size, amount, value, or importance (Soanes & Stevenson, 2003). Economically, change is an increase in an economic variable, normally persisting over successive periods. The variable concerned may be real or nominal, and may be measured in absolute, per capita, or other terms (Black, 2002).

¹⁰ **Sustainable Tourism** - Essentially tourism which can be sustained over the long term because it does not result in negative consequences for the social, cultural and physical environments of the area in which it takes place (Harris & Howard, 1996).

This study has borrowed from a range of change theories¹¹ from disciplines as diverse as business, biology, and mathematics. While tourism studies have also contributed, the development of this study, like the development of destinations, was ‘chaotic’. Ideas had to be explored, theories proposed, and comparative data located. One of the frustrations that emerged is the erratic nature of tourism statistics and the limited or non-existent data on developing destinations. It is difficult to attain long-term time-series data on a tourism variable that is consistent in the definition of the variable, the methodology for measurement, and the physical boundaries used in the data collection. Fully understanding the development of a tourism destination requires the availability of multiple data variables that reflect differing aspects of the destination, are comparative, and are collected over the same time frame.

Specifically, this study considers various patterns of growth of one principle tourism destination, and were relevant, several other destination levels, analysing the preconditions to growth, possible causes of change, and the resultant impact on the destination. This study is based on information gathered from two sources. Firstly, existing literature across many disciplines provides concepts from various theories on the processes of change, which can be applied to tourism destinations. From these theories important concepts¹² have been incorporated into a composite model of tourism destination change. Secondly, data on a multi-level tourism case is assembled and applied to test the model.

1.2 Background to the Study

This study aims to assist in the planning and management of sustainable tourism development by increasing the level of understanding of how destinations develop and change. Published studies on tourism destination change could be considered to have had four foci: tourism impacts, tourism planning, sustainable tourism, and destination life-

¹¹ **Theories** - There are many definitions of theory. For this work a theory is an attempt to bind together in a systematic fashion the knowledge that one has of some particular aspect of the world of experience (Ruse, 1995). It embraces a set of interrelated definitions and relationships that organises our concepts of and understanding of the empirical world in a systematic way (Marshall, 1998).

¹² **Concepts** - The terminological means by which social scientists seek to analyse social phenomena, to classify the objects of the observed world, impart meaning through explanation to these phenomena, and formulate higher-level propositions on the basis of these observations (Marshall, 1998). Therefore, for this work, concepts are components of a wider ‘theory’.

cycles. It is however recognised that each of these foci have not developed independently and that all are affected by wider changes in thinking over the past half century and the significant increase in tourism activity over that time. These four foci are introduced here to provide the basis for the research on literature regarding alternative theories on the processes of change (Chapter Two). In addition, detail on tourism impacts and the destination life-cycle will be provided in Chapter Two.

1.2.1 The Impacts of Tourism Development - An Historic Overview

As tourism has become progressively more widespread over the past half century, attitudes towards tourism and its impacts have changed (Foley et al., 1997). In a review of these changing attitudes, Jafari (1990) retrospectively proposed four platforms: advocacy, cautionary, adaptancy, and knowledge-based.

The ‘advocacy platform’ was the conventional approach present during the early world tourism boom of the mid-1950s. At that time the focus was on the twin-fold benefits of tourism on the economic and sociocultural aspects of a country’s development (Spanoudis, 1982).

The result of this pro-tourism development approach, combined with the limited tourism experience associated with the relatively newness of the activity, and the dramatic growth of travel after WWII, was numerous examples of unplanned, haphazard tourism growth, with apparent irreversible damage to the natural environment and local cultures (Savignac, 1991).

Although the positive picture of tourism development was still the dominant view, by the mid-1960s other opinions had begun to appear (Spanoudis, 1982). Recognition of the problem of impact emerged among natural resource managers, who proposed relevant environmental management strategies, including the concept of Carrying Capacity (Wagar, 1964), Environmental Impact Assessment (EIA) (US Government, 1969), the Recreation Opportunity Spectrum (Brown et al., 1978; Clark & Stankey, 1979), and the later concepts of Limits of Acceptable Change (Stankey et al., 1985), and Social Carrying Capacity (Stankey & McCool, 1989).

By the beginning of the 1980s, research had began to investigate the negative effects of tourism, including economic ‘disbenefits’, and the costs to the environmental and sociocultural elements (Travis, 1982). However, in many cases tourism related data was not available, anecdotal and/or unreliable (Coppock, 1982). An additional difficulty was the limited number of variables that lend themselves to measurement (Duffield, 1982).

This new attitude which challenged the existing pro-tourism development approach has since been termed the ‘cautionary platform’ (Jafari, 1990). The acknowledgement of the negative impacts caused by tourism resulted in the significant shift in focus (Foley et al., 1997).

Despite this growing support for the ‘cautionary’ approach, the ‘advocacy’ approach continued to drive much of the development. Debates between supporters of these two perspectives lead to the realisation that certain types of tourism result in fewer negative impacts (Pearce, 1989). This provided the basis for the ‘adaptancy platform’ (Jafari, 1990).

Ultimately, this approach generated a range of ‘low impact of tourism types’, with labels including alternative, green, soft, sustainable, responsible, appropriate, and ecotourism. An important aspect of this ‘adaptancy platform’ was the emphasise on the ‘mutual dependence’ between the environment and tourism (Foley et al., 1997).

Despite the continuing discourse on tourism development and it’s impacts, there was consensus that tourism needs to focus on the relationship between the positive and negative impacts of tourism activity (Jafari, 1990). Applying the principles of sustainable development (Section 1.2.3), the knowledge-based approach aims to achieve economic, environmental and sociocultural sustainability. Such an aim requires consideration of the relationship between the positive and negative impacts of tourism, as well as the trade-off between various impacts.

Although these platforms developed at different times they were additive and parallel, rather than sequential. The platforms represent different viewpoints and their supporters continue to advocate the advantages of their approach to tourism.

In fact, the changing views on tourism development and the growing understanding of the impacts of tourism have influenced approaches to tourism planning. The effects of tourism development are incorporated into the concept of sustainable tourism, which aims to achieve economic, environmental, and sociocultural sustainability, now and in the future. These two foci, tourism planning and sustainable tourism, will be discussed in the following two sections. I will return to the details of tourism impact understanding in Chapter Two.

1.2.2 Tourism Planning - An Historic Overview

Prior to the realisation of the negative impacts of tourism development, tourism planning was perceived as a simple process that focused on encouraging new hotel developments, ensuring adequate access via transportation, and conducting promotional campaigns (Getz, 1986; Inskip, 1991). Throughout the 1980s an understanding of the need for better planning evolved. It was recognised that tourism development was affected by a range of external factors, such as natural and cultural resources, community, governmental policies, entrepreneurship, finance, organisation leadership and competition (Baud-Bovy, 1982; Gunn, 1988). Despite this acknowledgement these factors were not incorporated in practice. Ultimately this multi-factorial nature led to the use of more holistic planning approaches for tourism in the 1990s (Burns, 1999).

1.2.2.1 Tourism Planning: 1945-1980

After WWII, tourism development expanded rapidly with many destinations, such as in the Mediterranean and the Caribbean, encouraging mass tourism without government planning going beyond established town planning (Inskip, 1991). At that time tourism development plans for individual projects were the usual practice. The plans were focused on 'physical planning' with analyses made of the resources available and the market situation. This determined a future image that then defined infrastructure requirements and favourable locations for the various developments (Baud-Bovy, 1982). This type of tourism planning was suitable for individual developments and the small resorts that existed prior to the development of mass tourism (Inskip, 1991). Ahead of its time was an integrated plan for the State of Hawaii which incorporated tourism into the total regional development plan in 1959 (Inskip, 1991). However, in general there was relatively little tourism planning undertaken by the public sector in the late 1950s (Burns, 1999).

By the 1960s the planning activity itself had evolved, with 'econometric models' being applied to planning tourism development. Alternative scenarios were compared on a cost/benefit basis. However, the process was impeded by the limited availability of reliable and relevant data, and the small differences between the alternatives (Baud-Bovy, 1982). This increased level of tourism planning was caused by the realisation of the economic benefits of tourism growth (Getz, 1986). Consequently governments began to undertake planning that affected tourism, although tourism itself was not considered equal to other industries (Burns, 1999).

By the 1970s planning was conducted for individual resort developments. However as tourism destinations are an amalgam of many developments, which range in size and investment, the extent of planning for each particular destination varied (Duffield, 1982). At this time the relative failure of the past approaches to tourism planning provided the basis for a more integrated approach. There was increasing recognition of the number of factors that affect tourism development and the complexity of the tourism sector. This occurred alongside the growing popularity of systems analysis, resulting in its application to tourism planning, for example, the 1977 World Tourism Organisation (WTO) Handbook of Integrated Planning which advocated a systems approach to tourism planning (Baud-Bovy, 1982). However, the planning process generally focused on the specific tourist operation in isolation rather than considering it as interacting within a destination system or any other wider systems (Getz, 1986; Burns, 1999).

Throughout the 1970s the World Bank operated a specialised tourism department (Davis & Simmons, 1982). It was set up in recognition of the rapid growth of international tourism through the 1960s, and the role of tourism as an export for the World Bank member countries. However, the 1970s was a decade of oil shocks and high inflation. As a result of the significant economic impacts and uncertainty, combined with other calls on the World Bank's resources, the tourism department was phased out in 1979 (Davis & Simmons, 1982). However, despite the economic shocks of the 1970s, international tourism had continued to increase by over 5 percent per annum (Davis & Simmons, 1982).

1.2.2.2 Tourism Planning: 1980-1991

By the early 1980s the economic importance of tourism in both the domestic and international arenas was apparent (Archer & Lawson, 1982). This reflected the 'value system' inherent in much of the tourism writings at that time. There was considered to be a focus on the economic benefits of tourism, the positive role of developing tourism, and how to invest in further tourism development (Travis, 1982).

In addition governments who were increasingly confronted with tourism externalities began to plan tourism. This was in an attempt to control or channel tourism to minimise the adverse aspects, while maintaining its positive effects. Such planning included regional or national tourism plans, as well as individual local project plans (Spanoudis, 1982). In 1983 the Australian Labor Party generated a policy document for tourism. This document recognised that the industry contributed significantly to government revenue at the local, state, and federal levels, while also recognising that the "protection of the environment should be a pre-requisite of any tourist development" (Australian Labor Party, 1983 p.6).

This aim of minimising the negative impacts of tourism provided the basis for new guidelines to assist in planning and managing tourism (Burns, 1999). This was expected to then generate both 'long-term tourism' and 'long-term net benefits' (Travis, 1982). It was clear that an interactive planning model needed to link tourism impacts with the environment, as it was recognised that such activities affect the physical, social and economic responses (Duffield, 1982).

An important aspect of planning for tourism during the 1980s was the incorporation of the dynamism of tourism. It was realised that fixed destination plans were therefore not appropriate. Instead, it was understood that a process involving periodic reassessment and updating was required (Gunn, 1982). In addition to this monitoring/revision approach, a second alternative was proposed, using an adaptable and evolutionary process, which incorporated external changes and any new information (Baud-Bovy, 1982).

Despite the development and existence of tourism plans, in practice many such plans were not able to be implemented. A survey conducted by WTO in the early 1980s found that half of tourism development plans had not been implemented at all, and of the remainder many had only been partially implemented (Baud-Bovy, 1982). The main reasons for this were

considered to be the lack of integration of tourism into the whole economy, the inadequate consideration paid to socio-economic impacts, the insufficient attention on the 'real mechanisms' of tourism development, plus the inability of plans to adapt to changing conditions. However, it was believed that the barriers to implementation of tourism plans could be overcome by changes to the planning process, through the incorporation of the various stakeholders and the inclusion of relevant external factors (Baud-Bovy, 1982).

De Kadt (1979) had claimed that the standard remedial approach to tourism planning needed to be replaced by planning that was community-controlled. However, according to Duffield (1982), one difficulty associated with including local stakeholders in tourism planning was that it is impossible to establish one method of destination development that will suit all local communities as these hosts can be extremely diverse, in terms of their physical setting, their cultural development, the economic conditions that affect them, and their ability to accommodate change.

By 1982 it was clear that tourism planning needed to reflect the interdependency inherent in tourism. This characteristic occurs in three ways: interdependency with the overarching socio-economic development of a nation; interdependency within the tourism sector; and interdependency between international tourism, domestic tourism and recreation (Baud-Bovy, 1982). A tourism development plan therefore "has to be integrated into the nation's socio-economic and political policies, into the natural and man-made environment, into the socio-cultural traditions, into the many related sectors of the economy and its financial schemes, and into the international tourism market" (Baud-Bovy, 1982 p.308). This challenged the view that tourism planning was only a political activity, involving regulations, positive and negative repercussions, and ultimately reflecting the desires and values of political constituencies (Gunn, 1988).

By the mid 1980s, the past economic prioritisation was being questioned, with issues being raised regarding limits to growth and appropriate planning models. There were many advocating a change from the traditional, narrow development focus, to make tourism planning more sensitive to non-economic issues (Getz, 1986). The level of change proposed, revising the emphasis and scope of tourism planning, suggested a deep-rooted dissatisfaction with existing tourism planning (Getz, 1986).

At that time tourism planning and management process models were considered to be one of four types: area-development models, project development models, management and marketing models, and planning as a conceptual system. A review of tourism planning models at that time by Getz (1986) concluded that the majority were project and development focused, and were based on problem-solving methodology. This illustrated the limited application of conceptual models that integrated the problem-solving processes with theory and research (Getz, 1986).

Consequently planning for tourism was conducted in various ways. The level of comprehensiveness in tourism planning varies as it can apply to whole systems or subsystems, and to various spatial scales, including site/project specific, or a defined geographical level (Getz, 1986). Tourism planning occurs at a multitude of levels, incorporating international, national, regional, and local. Planning is also conducted for specific sectors, such as social tourism or coastal tourism. A range of specific tourism plans are developed, including national marketing plans and tourism development plans. In addition there are numerous tourism related plans which focus on areas such as infrastructure, transport, and conservation (Pearce, 1989). Therefore, in the late 1980s there was not considered to be a universally accepted method of tourism planning and there was limited application of related findings (Gunn, 1988).

The impacts of tourism, as evidenced in numerous real-world scenarios, were considered to be one of two types. Firstly, impacts that are inherent in the development of tourism, and secondly impacts which could be eliminated or minimised through planning (Gunn, 1988). This provided the basis for the aim of optimisation of the positive impacts of tourism, combined with the mitigation of potential negative problems, through integrated planning and careful management (Inskeep, 1991).

By the late 1980s it was established that tourism planning was required and that it needed to be comprehensive, action-orientated, focused, explicit in mission, proactive, continuing, integrative, involve value intuition and judgement, and take a long-term approach (Gunn, 1988; Savignac, 1991). Integrative planning for tourism development was considered essential and it would be most effective if all factors are considered (Pearce, 1989). In addition, effective planning was seen to require that the objectives are defined and relate to

the needs of all sectors, resource analysis is matched with evaluation of demand by tourist markets, and the legal system enforces implementation (Pearce, 1989).

The reasons why planning for tourism is necessary had been clarified by the end of the decade. Inskip's eleven merits of tourism planning are summarised as:

1. As modern tourism is a relatively new activity, the limited experience of the public and private sectors necessitates the provision of guidance from tourism plans.
2. As tourism is a complicated, multi-sectoral, and fragmented activity, planning is required to co-ordinate development in an integrated manner.
3. A planning process can match the tourist markets with the products, without compromising environmental and sociocultural objectives.
4. Economic benefits can be optimised through planning.
5. Planning can optimise other benefits and prevent/lessen associated problems.
6. Planning is required to determine the optimum type and level of tourism for a particular environment.
7. Planning can ensure that tourism development is sustainable.
8. Planning can be used to maintain flexibility, allowing for new forms of tourism.
9. Tourism planning can ensure that appropriate education and training occurs.
10. A comprehensive and integrated planning process can be closely related to tourism policy and development.
11. Planning provides a rational basis for investment by the public and private sectors.

(Inskip, 1991 pp.16-17).

1.2.2.3 Tourism Planning: 1991-2005

The 1990s saw the continued development of tourism planning. In 1991 the dominant view was controlling activity to maximise benefits and eliminate significant problems (Inskip, 1991). The major issues relating to tourism planning at that time were the 'centre stage' position of the physical environment; recognition of the limits to development, with both physical and social carrying capacities; community involvement; cultural diversity; changing tourist and demographic trends; the shift to market-driven economies; the need to be proactive; and increasing privatisation and deregulation (Hawkins, 1991).

In addition to the variety of interests within tourism operations, numerous aspects of a tourism destination are managed by non-tourism specific businesses, local bodies and government agencies, and some aspects are simply not managed (Leiper, 1995). The lack of tourism knowledge amongst some of these bodies, combined with the level of diversity and fragmentation of the industry, and the difficulties of coordinated planning continues to result in instances of unplanned and inappropriate tourism (Tzoanos, 1994). Hall (1997 p.61) noted that despite the understanding of why tourism planning was necessary and the need for integrated planning, by the late 1990s models still did not “deal with the ‘real world’ of planning which is affected by a range of values, interests and stakeholders”.

However, it was understood that tourism planning and management needed to be integrated with the planning and management of other economic sectors, as many of the key resources on which tourism depends are managed by others or affected by the actions of others, for example, forestry, fishing, hunting, manufacturing, and agriculture (Manning & Dougherty, 1999). The barrier to such integration is that in most countries, these aspects of tourism are managed by a number of different government departments. Integration for tourism is therefore more difficult than for other industries. Consequently, tourism cannot be planned for in isolation (Manning & Dougherty, 1999). Yet there continues to be increasing expectation placed on tourism, with the decline in many traditional industries (Gunn & Var, 2002).

Ultimately tourism planning models need to incorporate the level of complexity inherent in tourism destinations. History has shown that planning concepts and methods need to vary according to geographic scale, resulting in planning for the regional level, which incorporates national, state, and provincial areas; the destination level; and the site level, for specific projects (Gunn & Var, 2002).

Specific tourism planning models have been developed and introduced. Some endeavour to establish the form of tourism suitable for the region, such as the 1991 Ecotourism Diagnostic and Planning Guidelines for Protected Areas Managers (Boo, 1991) and the 1993 Environmentally Based Planning Model for Regional Tourism Development (Dowling, 1993). Planning programs have also aimed to incorporate the various key industry stakeholders with existing research, in determining the priorities for developing tourism in a

destination, such as Tourism Queensland's Destination Management Planning process (Tourism Queensland, 2004).

The expansion of tourism and the economic benefits achieved throughout the 1980s heightened expectations of what tourism development could deliver. The limited realisation of these benefits during the 1990s highlighted the need for planning, and the need for total destination management (Burns, 1999).

Tourism planning has also been increasingly linked with sustainable tourism (Section 1.2.3), as exemplified by the establishment of the Cooperative Research Centre (CRC) for Sustainable Tourism in mid 1997 (Jago et al., 2003). However it has been proposed that while planning exists in policy documents rather than legislation it will remain difficult to realise sustainable tourism development (Hall, 1997). Reliance on market methods and processes is not sufficient as often market intervention would not assist in minimising negative impacts until after degradation had occurred (Collins, 1999).

The main difficulties that still face tourism planners are due to the complexity of tourism; the abstract nature of tourism; the lack of overall control by one individual; numerous, significant and unknown external affects; multiple stakeholders; the range of goals and objectives for tourism; the reliance on voluntary travel and travel preferences; changing environmental conditions; unpredictable entrepreneurial activity; the effects of acculturation; and the limited understanding of tourism by local peoples (Gunn & Var, 2002).

Significant changes and events that affect tourism, such as unexpected terrorism attacks, emphasise the ongoing need for tourism planning. The drop in the volume of travel post-September 11, 2001 highlighted the economic role of tourism, which extends beyond tourism specific businesses. As a result, planning for change in the complicated arena of tourism is necessary (Taylor, 2002).

In achieving 'better' tourism development, Clare Gunn and Turgut Var (2002) propose four goals: enhanced visitor satisfactions; improved economy and business success; sustainable resource use; and community and area integration. Ultimately "tourism is too important to mankind to let it continue to drift" (Gunn & Var, 2002 p. xxi).

1.2.3 Sustainable Tourism - An Historic Overview

In parallel with the changing understanding of tourism impacts and planning, perspectives on the relationship between tourism and the environment have also evolved (Butler, 2000). Debate on this tourism-environment relationship gained momentum in the 1960s (Fletcher, 2005). The focus at that time was on the deterioration of the environment at tourism destinations. Increasing debate occurred into the 1970s with a significant shift in attitudes and perceptions, in line with the general 'back to nature' attitude of the hippie generation. During this period the tourism industry generally believed that the conservationists were exaggerating the significance of the problems and that the positive aspects of tourism for the environment balanced out the adverse aspects (Boers & Bosch, 1994). However, the recognition of tourism impacts continued as tourism spread. In fact between 1970 and 1990 tourism volume increased by 300 percent (Singh & Singh, 1999).

Attitudes within the general tourism industry began to change in the mid-1980s. The main reasons for the shift in attitude were considered to be: the growing influence of the organised conservation and environmental movements; tourists who demand quality; tourists' awareness of their effect on the environment; and economic motives, as it was becoming profitable to 'turn green' (Boers & Bosch, 1994). However determining what actually categorised 'green' was debatable (Harrison, 1996). Questions were also posed regarding the balance between the immediate economic gain of tourism activity and the longer term environmental and cultural impacts (Briguglio, 1996), as discussed above (Section 1.2.1). In addition the wider changes in approaches to development affected tourism, including the concepts of 'integrated' development, 'resource management', and 'community-based' development (Hall, 1998).

Acceptance that tourism development can damage the environment paved the way for control of development to avoid the negative impacts, as the natural resources are also the tourism resources (Romeril, 1989). This dependence of tourism on the environment was realised by the tourism industry, government, and the tourists themselves (Boers & Bosch, 1994). It was ultimately realised that, "unless responsible management practices are in place, the industry can degrade the very feature on which tourism's prosperity is based" (Manning & Dougherty, 1999 p.1).

However, despite common understanding of the importance of the natural environment and the results of uncontrolled tourism, there was limited agreement on the type and/or level of control. The question posed was: What is the balance between tourism development and environmental protection? It was realised that agreement is complicated as value judgements are required, suspicions exist between the environmentalists and the tourism industry, and there is a lack of consistent political resolve to implement environmental policies. One reason why the relationship between tourism and the environment is complex is that both fields are intrinsically diverse (Romeril, 1989).

In the climate of general societal attitude change during the 1980s, with concepts such as the 'global village', the 1987 United Nations' World Commission on Environment and Development (WCED) published 'Our Common Future', commonly known as the 'Brundtland Report' (WCED, 1987). Sustainable development was the main concept within the report. This now widely recognised definition of sustainability is *development that meets the needs of the present without compromising the ability of future generations to meet their own needs* (WCED, 1987). The report specified that development should ensure intergenerational and intragenerational equity, and embrace social justice, cooperation and the global community (Collins, 1999). This sentiment was encapsulated by Murphy (1994 p.275): "we do not inherit the earth from our forefathers but borrow it from our children".

Practically, the definition of sustainable development can be considered to incorporate the three main areas of "long-term economic sustainability; within a framework of long-term ecological sustainability; and with an equitable distribution of the costs and benefits of development" (Woodley, 1993 p. 136). Thus the analytic framework is broad, incorporating economic, environmental and sociocultural aspects (Fletcher, 2005).

The World Conservation Strategy: Living Resource Conservation for Sustainable Development (IUCN et al., 1980), with the Brundtland Report (WCED, 1987) have been credited with the introduction of the term 'sustainability' and beginning the popularisation of sustainable development as a goal for human society (Kreutzwiser, 1993; Manning & Dougherty, 1999; Gunn & Var, 2002). Sustainable development also received government support as it incorporated economic growth (Wood, 1993). In addition international acceptance of sustainable development is thought to be due to its timing, as it emerged when scientific, economic, sociocultural and environmental problems were converging (Hardy &

Beeton, 2001; Hardy et al., 2002). This is yet another example of the interrelationship of tourism with other aspects of the wider world.

The concept of sustainable development was adopted by tourism and termed 'sustainable tourism'. The extent of the acceptance and use of this term has been considered both 'satisfying and disturbing', while implementation has been limited (Butler, 1998).

The first stage had been the realisation that tourism can be dependant on the state of the environment. The sustainable development principle added an additional focus to tourism, such that the activities should not threaten the needs of future generations (Boers & Bosch, 1994). Based on an understanding of the evolving nature of tourism, there developed an increasing level of concern about the future direction and a call for a fundamental shift from the exploitative to a sustainable tourism development approach (Prosser, 1994). At that time, sustainable tourism was seen to be the 'polar opposite' of the existing mass tourism, described retrospectively by Clarke (1997).

This led to the second stage, the belief that the tourism sector, as users of the environment, should assist in maintaining and improving its quality (Boers & Bosch, 1994). A proposed working definition was put forward by Butler in 1993. A significant aspect of this definition was the differentiation between 'sustainable development in the context of tourism' and 'sustainable tourism' (Nelson, 1993). True sustainable development for tourism was considered to be "tourism which is developed and maintained in an area (community, environment) in such a manner and at such a scale that it remains viable over an indefinite period and does not degrade or alter the environment (human and physical) in which it exists to such a degree that it prohibits the successful development and well-being of other activities and processes" (Butler, 1993 p.29).

An alternate definition considered sustainable tourism to ultimately seek "to sustain the quantity, quality and productivity of both human and natural resource systems over time, while respecting and accommodating the dynamics of such systems" (Prosser, 1994 pp. 31-2). Such perspectives illustrate Hunter's 'extra-parochial paradigm' which "entails a much less 'precious' approach to the role and importance of tourism as an entity, and recognises that tourism does not have an inherent right to grow in an area at the expense of any other

sector, unless it better meets the requirements of sustainable development generally” (Hunter, 1995 p. 162).

In 1992 the United Nations Conference on Environment and Development (UNCED) was held in Rio, Brazil. The three-year preparation prior to the conference aimed to ensure that the outcome, ‘Agenda 21’, was an action plan based on the challenging debates which generated consensus on the decisions required for achieving sustainable development (Robinson, 1992). This Earth Summit ‘Agenda for the 21st Century’ included the Rio Declaration of the 27 principles regarding the environment and development (United Nations, 1993).

Subsequently, the Agenda 21 for the Travel and Tourism Industry was produced by the World Travel and Tourism Council, the World Tourism Organisation, and the Earth Council (WTTC et al., 1995). The Agenda 21 presented strategies the industry should follow to generate sustainability (Manning & Dougherty, 1999). This cross-national agenda for the 21st Century recognised that the global problems are the result of all the activity at the local levels (Jackson & Morpeth, 1999). The aggregate picture is therefore the culmination of all the decisions and actions taken that affect each industry, including tourism and its destinations. Despite the intentions at that time, the resolutions of the summit still apply today as there has been limited implementation of the strategies and action plans (Fletcher, 2005).

Social change drivers behind the growing interest in the sustainability of tourism were: tourist dissatisfaction with existing products; growing environmental awareness and cultural sensitivity; realisation by destination regions of the important resources they possess, both human and natural, and their vulnerability; as well as changing attitudes of developers and tour operators (Prosser, 1994). Drivers for adoption by the tourism industry have been considered to be economic, public relations and marketing (Butler, 1998).

As industry tried to implement the ideals of sustainable tourism there was a shift in thinking throughout the 1990s, resulting in the concept of a continuum between non-sustainable mass tourism and small sustainable tourism. This evolving concept was still focused on the scale of development (Clarke, 1997).

There is no easy answer for how sustainable tourism can be achieved, particularly as each destination/environment combination is different (Boers & Bosch, 1994). In addition sustainable tourism has been viewed from multiple disciplines, including economics, sociology, anthropology, environmental studies, and ethics, resulting in numerous definitions and perspectives (Archer et al., 1996). In reality, the debate over the definition, management and implementation of sustainable tourism continues the age-old discussion on natural resource usage, as well as reflecting the more recent changes in attitudes regarding the environment (Hall, 1998). According to Faulkner (1998 p.207) “the emerging sustainable tourism development philosophy of the 1990s can be viewed as an extension of the broader realisation that a preoccupation with economic growth without due regard to its social and environmental consequences is self-defeating in the longer term”.

A review by Collins (1999) of the approaches to sustainable tourism highlighted how rarely they coincided with the true principles of sustainable development. The focus of tourism practice was instead on concern for the maintenance of the physical and cultural environment, in particular the preservation of flora, fauna, and habitat. Generally theory and research on tourism development has had limited focus on the environment (Milne, 1998) or social aspects (Williams & Shaw, 1998), which are both important components of sustainable development. Therefore, despite its popular use, sustainable tourism continues to be difficult to achieve.

Balancing all the goals is unrealistic in practice, and in reality ‘trade-off’ decisions are made, generating priorities which ‘skew’ the destination system (Hunter, 1997). Therefore tourism development, even when aiming for sustainability, could be seen to be really ‘trade-off tourism’, with the trade-off occurring between dramatic economic growth and environmental quality (Collins, 1999).

In an attempt to satisfy the aspirations for sustainable development for tourism, ‘principles for sustainable tourism’ were generated (including Eber, 1992). A primary principle of sustainable tourism aims to focus attention on the long term (Cooper et al., 1993; Cooper et al., 1998; Fletcher, 2005). Instead of an ideal destination to be reached the concept of sustainable tourism is the basis for the direction of the journey. Aspiring to sustainable tourism is to “declare an intention to manage the scale and nature of tourism in such a way that social and physical surroundings are preserved” (Boers & Bosch, 1994 p. 55).

Foley, Lennon and Maxwell (1997) asserted that tourism development, to be sustainable, should focus on the underlying philosophy of sustainable development, aiming to minimise environmental and cultural damage, optimise visitor satisfaction and maximise long term economic growth. This attitude regarding the meaning of sustainable tourism was a development from the initial sustainable tourism concept, of a scale related possession, to a 'movement' whereby all tourism, including mass tourism, should aim to be sustainable (Clarke, 1997).

Achieving a sustainable approach to tourism requires shifts within the main areas of the tourism system, the attitudes of tourists, the response of destination areas, the responsibilities of the tourism industry, and the perceptions of the local communities. Destinations need to take a longer term view, with policy reflecting ecological and social time frames, not just political and economic time (Prosser, 1994).

As a result of the growing awareness of the need for sustainable tourism, environmental protection measures have been introduced in some tourism destinations and individual businesses (Boers & Bosch, 1994). Some consider small-scale tourism as being more aligned with sustainable tourism than mass tourism (Collins, 1999). This approach promoted ecotourism as a sustainable form of tourism. Subsequently ecotourism became the fastest growing, albeit smallest, sector of tourism, resulting in the 1990s being termed 'the decade of ecotourism' (Singh & Singh, 1999). However "forms of tourism being promoted on the basis of sustainability may well be more harmful to the area, its habitants and environment in the long term than more conventional tourism" (Butler, 1993 p.28). In addition may believe that there is the potential to develop environmentally sensitive mass tourism (Collins, 1999). To achieve this form of sustainable tourism development the trend to maturity is encouraged, as this moves the destination from multiple small operators to a smaller number of large organisations. This can be considered a positive change as the small firms often cannot incorporate environmentally friendly practices (Leiper, 1995). One trade off of this approach is that although the larger firms maybe 'greener', they require a significant volume of tourists. Ultimately it reached the stage where Smith (1999) claimed that it is politically correct to be environmentally sensitive.

Despite the support for sustainable tourism there are a number of obstacles in its achievement, including:

1. A lack of understanding about the link between tourist development and environmental problems
 - ⇒ insufficient understanding of good management practices
 2. Institutional problems
 - ⇒ lack of coordination, integration and agreement between the authorities
 - ⇒ lack of research, human resources and funds
 3. The necessity for cooperation between the tourist industry and other stakeholders
 4. Tourism is primarily an economic activity
 - ⇒ dependence on tourism
 - ⇒ level of competition
 - ⇒ incompatible with gradual, sustainable development
 5. Tourism is a sector requiring major capital investment
- (Boers & Bosch, 1994 pp.46-7).

At the beginning of the 1990s Butler (1990) called for recognition of tourism as an industry which inherently involves development and change. It is since become accepted that as an industrial activity, tourism requires finite land resources, it consumes resources, demands extensive and specific infrastructural improvements, and creates waste (Foley et al., 1997; Collins, 1999). The finite nature of natural resources means that ongoing social and economic benefits require the sustainable use of the natural resources (Romeril, 1989). In addition, the level of demand is highly susceptible to changing fashion in holiday destinations, and threats of political instability (Collins, 1999). As the situation is different at each destination it is important that sustainable tourism is considered an 'adaptive paradigm' which constitutes various approaches (Hunter, 1997).

It is a delicate balance to optimise the returns while protecting the resource base (Prosser, 1994). The principle of sustainable tourism therefore requires holistic, integrative and long-range planning, and a better balance between the spatial, environmental and economic aspects of tourism development (Foley et al., 1997; Gunn & Var, 2002). Sustainable tourism therefore highlights the need for a broader view that incorporates planning aspects (Section 1.2.2) and impact minimisation (Section 1.2.1), while encompassing all areas of

destination development (Section 1.2.4). Thus the application of the concept of sustainability to tourism continues to evolve (Ko, 2001).

Accepting that any tourism activity will create some level of impact and change, and that both natural and human systems are dynamic and can absorb some impact but have limits to the rate and extent of change, planning for sustainable tourism requires controlling development within the 'adaption thresholds' of the destination (Prosser, 1994). An important contribution of the aim of sustainable tourism is the incorporation of responsibility. The resources of the destination must be used responsibly by all those involved, including businesses, government, the tourists, and the host community (Fletcher, 2005).

As proposed by Getz (1986) in the mid 1980s, an impediment to achieving the goal of sustainable planning is the inability to model the tourism system thoroughly. The life-cycle theory (Butler, 1980) was one attempt in providing a model of tourism destination development. While increasing understanding of such change, the model does not match the tourism system in its true complex and dynamic form.

1.2.4 Tourism Destination Life-Cycle

The fourth significant focus of tourism destination research has been the destination life-cycle. This theory will be discussed with other process of change theories in Chapter Two. Butler's Tourist Area Cycle of Evolution (Butler, 1980) was an application of the marketing product life-cycle theory to tourism destinations. The product life-cycle, in turn was based on a metaphor, namely the biological life-cycle of higher living organisms: birth, growth, maturity and death (Tellis & Crawford, 1981; Hart et al., 1984; Scott, 2003).

The 'cycle of evolution' models were based on sequential stages that describe the development of tourism destinations over time. Substantial application of this framework, conducted for specific locations indicate the general validity of the evolutionary framework to describe past tourism development (Section 2.4.2.2).

The model of the destination life-cycle can be used to describe past large-scale or high-level changes within destinations (Towner & Wall, 1991). However it does not consider the

smaller and lower-level changes and their interaction, nor does it identify the catalysts and situations conducive for tourism development, or incorporate the significance of external events and influence. This is partially due to the typical use of a single data variable, such as total visitor numbers, as the indicator of destination growth. If the tourism system operating at a destination is to be fully understood multiple data variables that accompany change at a destination must be examined. This would also provide the opportunity to study the correlation and interaction between variables. The model being developed by this work incorporates these complex issues.

1.3 Rationale for this Research

The history outlined above has resulted in those involved in tourism facing a confusing mix that includes a list of impacts to avoid, a variety of planning models that are often location specific or require substantial stakeholder involvement, pressure to develop sustainable tourism, as well as a general destination life-cycle model, which may or may not fit the overall pattern of growth of a particular destination. Although tourism life-cycle theory is an 'adequate' macro scale description of destination growth, no adequate theory exists for the micro changes underlying this reported phenomenon¹³. The intent of this study is to provide a better model that can be used to understand any type of tourism destination growth. Such a model would address internal changes and interactions, and the responses within the destination to external forces. In addition it would illustrate the impact at various scales. Understanding these changes, interactions, and responses would allow the construction of theory that could be applied to tourism destinations, irrespective of the geographical scale.

The macro growth pattern of a destination does not provide the complete picture of the destination change, as it is in fact the combination of all the interactions of micro level changes. Growth in total visitor numbers, could for instance, be the result of declining domestic visitors combined with increasing international visitation, or the introduction of a new product market, or any other mixture. Although the interactions resulting in the

¹³ **Phenomenon** is a fact or situation that is observed to exist or happen, especially one whose cause or explanation is in question (Soanes & Stevenson, 2003).

aggregate pattern are often complex, it is necessary to understand the ‘how and why’ of micro level changes before the overall macro dynamics can be truly understood. This knowledge could in turn allow ‘informed’ intervention in tourism destination development.

Consequently the overall aim of this study became: **to understand how and why change occurs within a tourism destination.** This required consideration of firstly, the preconditions that allow, encourage, or prevent certain patterns of growth and secondly, the role of significant individuals, decisions and events in causing change. The process of change in a tourism destination can therefore be expressed by an equation (Figure 1.2).

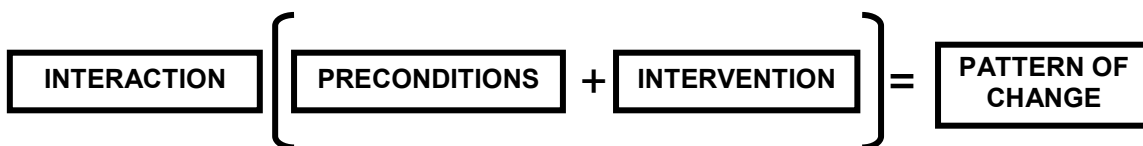


Figure 1.2 The Process of Change in a Tourism Destination. Illustrates that the resultant pattern of change in a destination is dependant on the manner in which the components of the tourism system are affected by, and respond to intervention, that may be internal to the destination, or from the external operating environment.

The preconditions include the existing tourism, geographical, social, cultural, and political conditions. Interventions may be internal or external, relating to economic, political, or legislative decisions, social or cultural change, planning, investment, development, events, or significant people. The interaction between the preconditions, and the internal and external intervention, results in the pattern of change for the destination. Additionally the resultant pattern of change becomes the existing preconditions for future change processes. By understanding the relationships between the preconditions and the intervention it may be possible to better predict the resultant change.

From the general aim a series of research questions emerged that directed this study. Collectively these questions were to examine three theses. Firstly: **that the observed patterns of tourism destination change can be understood as the outcome of a multitude of smaller events that have a complex pattern of inter-relationships.**

Secondly: **that the pattern and interaction of the tourism system operates at varying scales which can be spatial and temporal, and involve social, economic, and political variables.** Finally: **that tourism is a complex system, not amenable to simple modes of analysis.**

The research questions developed to assist in the examination of these theses are set out below and mapped to the chapters of this dissertation (Figure 1.3).

Research Question One:

What concepts within existing theories on the processes of change are relevant for studying the development of a tourism destination?

(Chapter Two - Literature Review)

Research Question Two:

Can a model of the processes of change in a tourism destination be devised?

(Chapter Two - Output of the Review of Literature)

Research Question Three:

Can a body of data be assembled that allows the proposed model to be applied to a case study tourism destination?

(Chapter Three - Research Design)

Research Question Four:

Does the proposed model hold when tested against change in the tourism case study?

(Chapter Four and Five - Case Study Research)

Research Question Five:

Can the devised and tested model of change in a tourism destination be used predictively to assist planning and development of a sustainable tourism destination?

(Chapter Six - Conclusion)

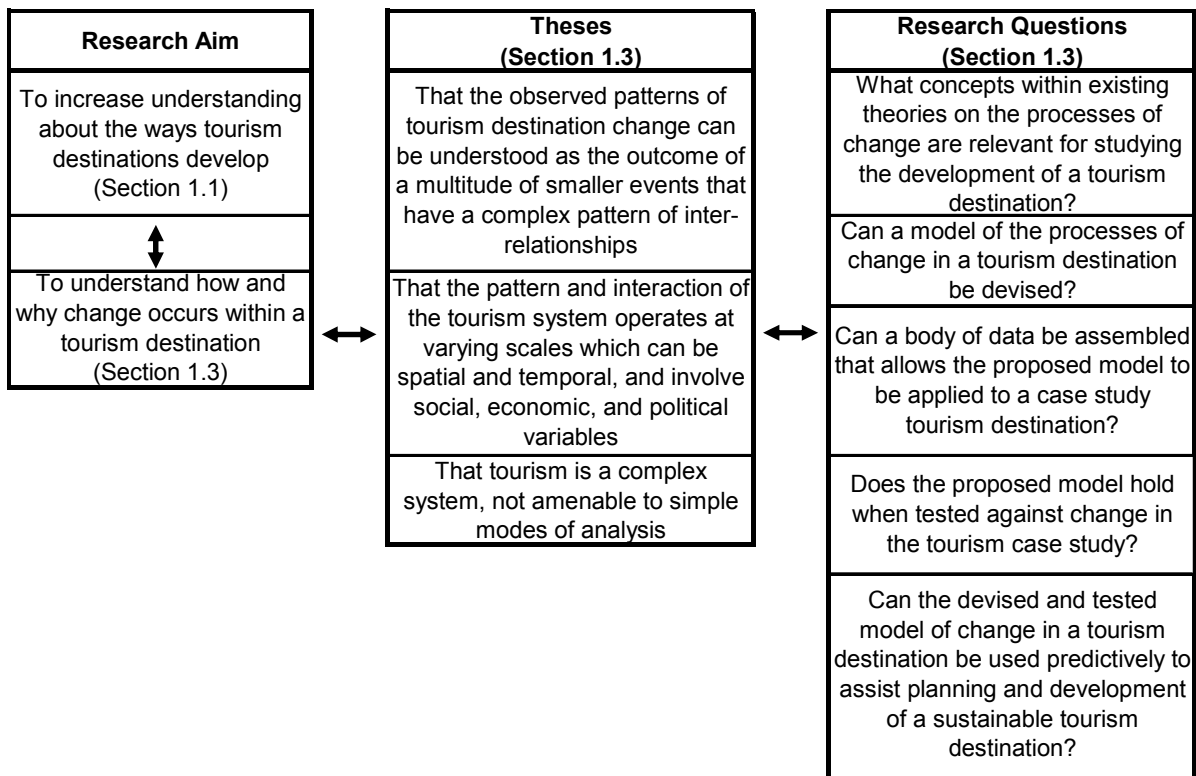


Figure 1.3 The Initial Research Aim, Theses, and Research Questions.

1.4 Structure of the Dissertation

In addition to this introductory chapter, the dissertation has five chapters (Figure 1.4). There are two primary objectives for Chapter Two. Firstly the chapter reviews literature on tourism destination change (Research Question One) and secondly, a model is developed from a diversity of existing theories (Research Question Two). In doing so the range of theories that have been applied, to differing degrees, to understand tourism destination development, are reviewed. For each of these theories the important contributions and limitations are identified. As no single theory has been able to address the complexity of tourism destination change an alternate model is proposed. This model encapsulates the thesis I have proposed. Elements of the model are not new as the model incorporates relevant concepts from the theories discussed. A new contribution is the ability of the model to incorporate a range of variables in many contexts. The remainder of this study involves the testing of the proposed model through its application to the tourism destination case study.

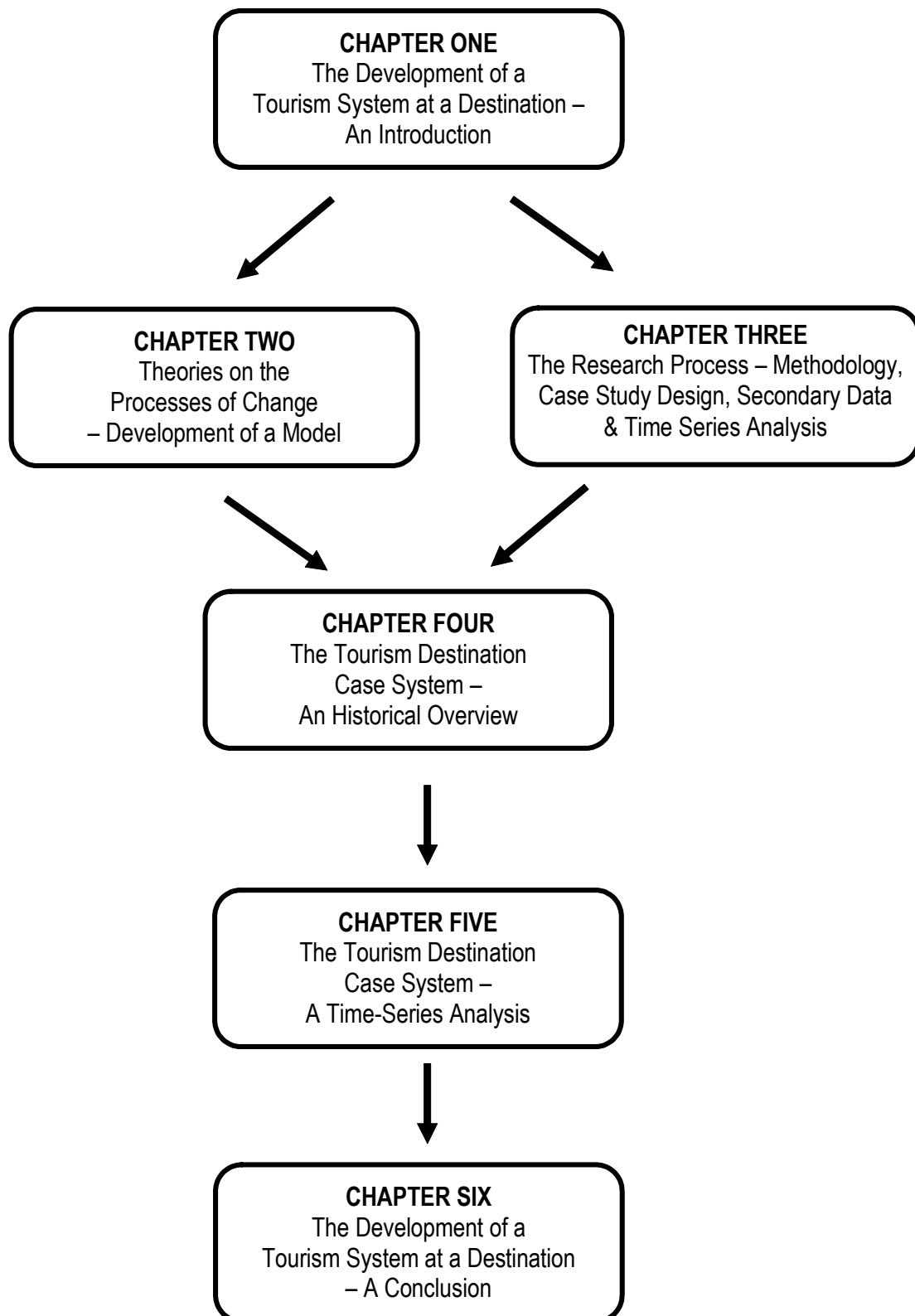


Figure 1.4 Dissertation Structure

Chapter Three provides the methodological basis for the case study approach used for this work. As this research aims to establish whether the theoretical model developed in Chapter Two can be used to explain tourism destination change, it is necessary to apply the proposed model to tourism destination change. Case study research is discussed in this chapter and the specific inquiry approach used in this study is defined. Having established the approach undertaken, the process involved in the selection of the tourism case study is described. This is followed by an examination of secondary data, specifically in relation to tourism statistics (Research Question Three).

To provide a context for the data collected for the tourism case study, Chapter Four provides a historical overview of the development of tourism in the case study system. This tourism system encompasses a number of levels, from the three Local Government Areas; Noosa Shire, Maroochy Shire, and Caloundra City, which make up the Sunshine Coast destination, through the State and National levels, to Global trends and events. This chapter describes the impact of significant people, decisions, and events on this multi-level case study. These impacts are matched to changes in the data variables in the subsequent data analysis chapter.

Chapter Five presents data that describes change in the tourism case study. Applying the model to be tested results in an analysis of the growth/change patterns in a multitude of data variables at different levels of the case system (Research Question Four). In addition, the changes in the various levels of the tourism system are linked to individuals or events that contributed to the pattern of change, and the preconditions which allowed or encouraged this change. The patterns at the different levels are also examined to determine whether the Sunshine Coast destination and its three regions mirror the aggregate state and national trends. This determines the effect of external influences on the destination and its regions.

Chapter Six concludes the dissertation and presents the main findings of the study and their potential impact on future planning for tourism. This will determine whether the knowledge of the processes of change in a tourism destination can be used predictively to assist planning and development of a sustainable tourism destination (Research Question Five).

Chapter 2 Theories on the Processes of Change - Development of a Model

2.1 Overview of Chapter Two

It is accepted that “tourism itself changes and evolves over time” (Butler, 1993, p31). In setting out the general problem Chapter One indicates the need for better change theories for understanding tourism destination development. Change theories have developed in a range of disciplines, including biology, business, and mathematics. The past application of such change theories to the development of tourism destinations varies. Chapter Two reviews the four major process of change theories, their application to tourism destinations, and the relevant concepts in each theory that can assist in increasing understanding of destination development.

This chapter is divided into seven sections (Figure 2.1). The first section considers how the approaches to the development of tourism have changed over time and is based on Jafari’s (1990) four platforms of advocacy, cautionary, adaptancy, and knowledge-based. This expands on the summary provided on tourism impacts in Chapter One.

The second section introduces and justifies the application of transdisciplinary concepts in approaching and understanding tourism development. General frameworks applied to tourism destination development will be considered to illustrate the need for a holistic approach. To achieve this, systems theory will be introduced as the framework for understanding the open, complex, and dynamic tourism system.

The third section reviews the literature associated with the main change theory that has been widely applied to tourism destinations, namely the Tourism Area Cycle of Evolution (Butler, 1980). This tourism destination life-cycle model was an application of the marketing concept of the product life-cycle to tourism destinations. While the life-cycle concept has served as a useful descriptive model of the overall change within a destination, the causes and complexity of destination change requires a more sophisticated framework.

To establish such a framework other ways of understanding the processes of change are explored.

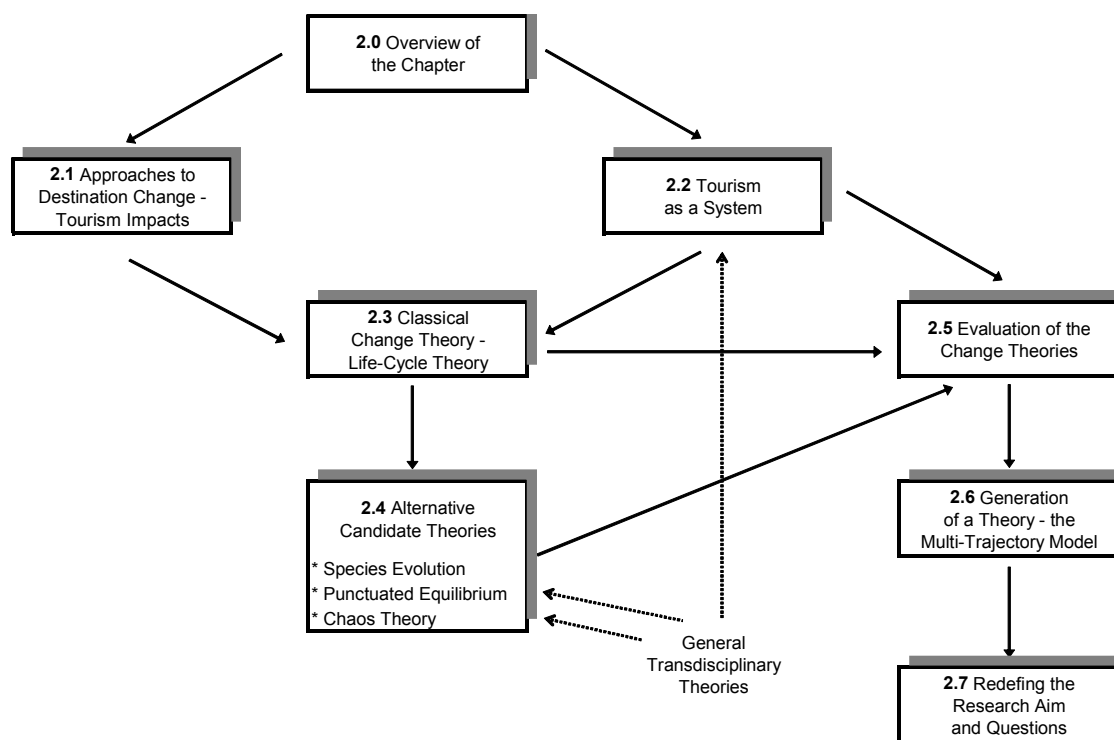


Figure 2.1 Structure of Chapter Two.
Outlining the flow of the chapter and the linkages between the seven sections.

The fourth section of this chapter incorporates three theories on the processes of change: Species Evolution, a biological metaphor; Punctuated Equilibrium, a biological metaphor reapplied in business studies; and Chaos Theory, a physical and mathematical metaphor that has been widely applied to complex systems. The application of each of these theories to tourism destination development will be examined. Punctuated Equilibrium and Chaos Theory are two theories that further continue the application of transdisciplinary concepts, as they are both considered part of the larger transdisciplinary General Theory of Evolution. This theory is a nonlinear approach that is considered appropriate for the study of open systems (Laszlo, 1991).

Section five will involve an evaluation of the four candidate process of change theories: Life-cycle, Species Evolution, Punctuated Equilibrium, and Chaos Theory. This examination considers the ability of each theory to explain the type of change which occurs in tourism destinations. It separates out the concepts from each theory that are particularly

relevant for understanding tourism destination development. These concepts provide the basis for the hypothesised framework for understanding the various ways that destinations change and hence address the central aim of this work.

Section six of this chapter introduces a composite model that incorporates the relevant concepts from each of the four process of change theories. The model illustrates the various ways that destination change can occur. In conjunction with the proposed model, a number of implications of the model are presented. The proposed Multi-Trajectory Model of Tourism Destination Change will be empirically tested through the analysis of a multi-level tourism case study and presented in Chapters Four and Five.

The final section of this chapter redefines the research aim initially proposed in Chapter One, and reassesses the research questions on the basis of the preceding literature review and the development of the Multi-Trajectory Model of Tourism Destination Change.

2.2 Approaching the Study of Tourism Destination Change

As a result of the dramatic increase in tourism activity over the last few decades there has been growth in the extent of tourism-related research (Bushell et al., 2001). There have, and continue to be, various ways of viewing tourism destination development. Research to date has focused on some aspects of the destination. Examples include marketing (Bonnett, 1982; Lusch & Lusch, 1987; King & Hyde, 1989; Witt & Moutinho, 1989; Dann & McMoll-Kennedy, 1992; Lumsdon, 1997; Lovelock et al., 1998; Walker & Enjeti, 1998; Kotler et al., 1999; Johnson, 2000 among others), planning and management issues (Gunn, 1979; Archer & Lawson, 1982; Baud-Bovy, 1982; Gunn, 1982; Spanoudis, 1982; Travis, 1982; Winpenny, 1982; Pearce, 1989; Hall, 1991; Inskeep, 1991; Hall, 1995; Hall, 1997; Burns, 1999; Gunn & Var, 2002 among others), economic indicators (Duffield, 1982; Prideaux, 2000 among others), environmental and socio-cultural impacts (de Kadt, 1979; Laflamme, 1979; Duffield, 1982; Mathieson & Wall, 1982; Travis, 1982; Farrell & McLellan, 1987; Romeril, 1989; Stankey & McCool, 1989; Craik, 1991; Dowling, 1992; Carter, 2000; Carter, 2004 among others), and the concepts of sustainability (WCED, 1987;

Boers & Bosch, 1994; Clarke, 1997; Manning & Dougherty, 1999; Hardy et al., 2002 among others), and carrying capacity (Wagar, 1964; Shelby & Heberlein, 1986; Stankey & McCool, 1989; Butler, 1997; Williams & Gill, 1999 among others).

Each of these research foci has provided the basis for obtaining relevant information on aspects of tourism destination development. However, the use of data and findings from domain-specific research is limited to the particular area and issue investigated, as highlighted by Oh, Kim and Shin (2004) in their recent review of hospitality and tourism marketing research. Such a mono-disciplinary approach is not appropriate for understanding the overall change, as tourism is a complex multi-element phenomenon. The outcome is that a transdisciplinary approach is required (Carlsen, 1999).

2.2.1 Changing Approaches to Tourism Destination Development

As tourism has become progressively more widespread, attitudes towards tourism and its impacts have changed (Foley et al., 1997). Traditionally, particularly in Western cultures, the environment was perceived as resources to be used for the satisfaction of humans. Impacts, if considered, were seen as ‘externalities’ and did not warrant a corresponding change in behaviour (Manning & Dougherty, 1999).

The limited tourism experience associated with the relatively newness of the activity, combined with the dramatic growth since WWII, resulted in numerous examples of unplanned, haphazard growth, with apparent irreversible damage to the natural environment and local cultures (Savignac, 1991). Only recently have the limits of the environments in which tourism activity occurs been acknowledged. Usually such environments are identified only when their limits have been violated (Manning & Dougherty, 1999).

Tourism impact analysis has, since the 1980s, incorporated economic, social, cultural, and environmental issues. The reporting of impacts revolved around the investigation of existing tourism enterprises and destinations, and was often descriptive in nature. The increasing body of knowledge was centred on the resultant impacts of tourism, both positive and negative. In 1995 Leiper (1995 p.160), building in his seminal work (1979), stated that more had been “written on impacts, by a greater number of commentators and researchers, than on any other topic about tourism”.

In 1990, the changing views on tourism were reviewed by Jafari (1990), who proposed four platforms: advocacy, cautionary, adaptancy, and knowledge-based (Figure 2.2). The following discussion describes the development of each of these platforms, and the context in which they developed and continue to be applied.

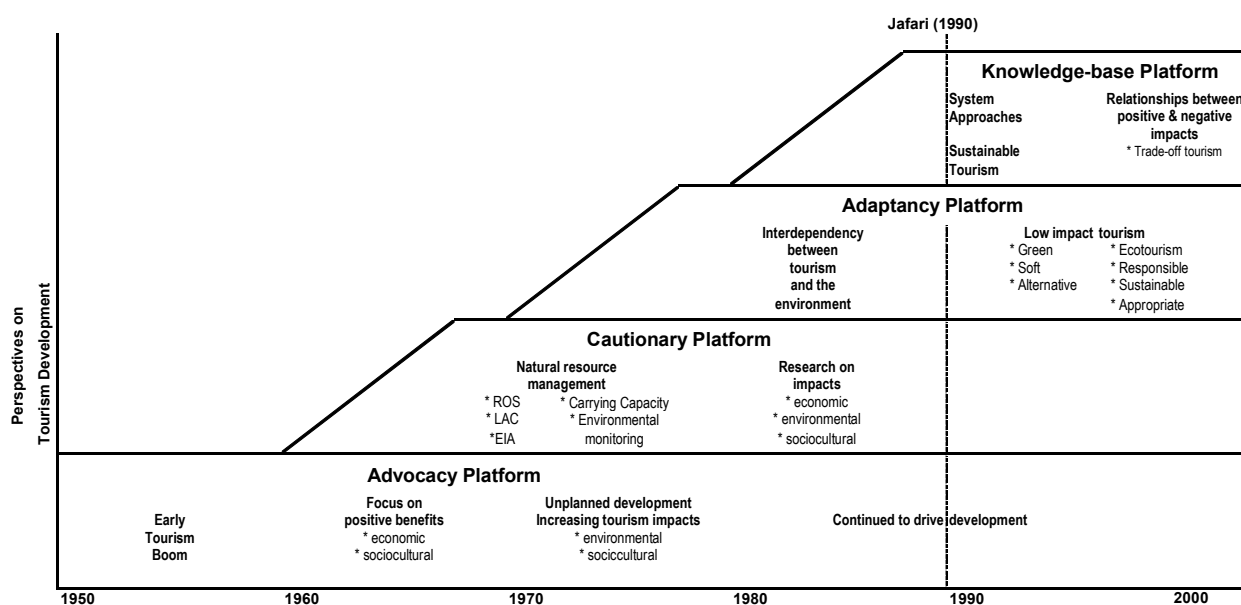


Figure 2.2 The Changing Views on the Impacts of Tourism Development. Representing Jafari’s four platforms of Advocacy, Cautionary, Adaptancy and Knowledge-Base (Jafari, 1990), and the accompanying development, research and tourism/environment positions.

2.2.2 Development of the Advocacy Platform

During the early tourism boom of the mid-1950s, the focus was on the positive impacts of tourism activity. This included the twin-fold benefits of tourism on the economic and sociocultural aspects of a country’s development (Spanoudis, 1982). The emphasis was primarily on the positive economic impacts to a country from tourism, with the combined direct and indirect benefits stimulating the economy. A second positive aspect of tourism activity was considered to be ‘socio-cultural cross-fertilisation’, with tourism providing contact between cultures that would increase understanding, educate both tourists and hosts, spread ideas, increase modernisation, and encourage local arts and craft (Spanoudis, 1982). Retrospectively, this perspective has been described as the ‘advocacy platform’ by Jafari (1990), as tourism was perceived as causing minimal interference and the relationship between tourism and the environment was deemed coexistent. This perspective was even seen to be so by conservation advocates.

In the late 1940s, the Queensland Government established the Queensland Tourist Development Board (QTDB) to determine the potential of Queensland's tourism resources (Barr, 1990b). Their 1947 report was titled 'The Tourist Resources of Queensland and the Requirements for their Development', and outlined recommendations for the development of the State's tourist resources (QTDB, 1947). This report was ahead of its time, recognising the limits to development, and providing a detailed analysis of the situation at that time. The report also reflected the conventional thinking, with the focus mainly on economic development and support for tourism. The report identified 20 key areas suitable for the establishment of tourism, and provided for each, a description of existing access and facilities, along with suggestions for their development (QTDB, 1947). In the report, the tourist industry was defined as "an industry based upon tourist traffic, of the greatest economic and social importance, and similar to other national industries" (QTDB, 1947). The focus can therefore be seen to have been on development.

Such tourism development plans were generated throughout the world over the following thirty years. In 1978 the World Tourism Organisation (WTO) conducted an inventory of national and regional tourism development plans (WTO, 1978). Of the forty-three National Tourism Administrations (NTAs) that responded to the questionnaire, twenty-nine had a national tourism development plan in place, with a further eight preparing such a plan. The majority of development plans were integrated into the wider national economic and social plans, with only six countries focussing on a tourism specific development plan. All the national plans aimed to develop international tourism, with the majority also seeking to increase domestic travel. The priorities of the majority of plans centred around tourism development, planning and developing the main tourist areas, building new accommodation, increasing the diversity of product, and marketing/promotion (WTO, 1978).

At the regional level, six countries of the forty-three NTAs who responded had one or more regional tourism development plans in place, including Australia with its plan for the Northern Territory. A further sixteen NTAs had one or more regional plans in preparation (WTO, 1978).

Of particular relevance to the tourism case area analysed in this work were the two 'Boeing Reports' of 1981 and 1986 (QTTC & Boeing, 1981; Boeing, 1986). These reports highlighted the potential for tourism within Queensland, and the corresponding need for

development and marketing to achieve this (QTTC & Boeing, 1981). The first Boeing Report provided forecasts for the expected level of domestic and international visitors to Queensland for 1983 and 1985 for two scenarios, a 'Natural' or 'Baseline' level of annual growth, and an 'Accelerated' level that could occur if an 'aggressive tourism posture' was adopted (QTTC & Boeing, 1981).

The aim of the follow-up Boeing report was to determine the requirements for continued tourism growth in Queensland and the economic benefits of such development (Boeing, 1986). This second report was also more comprehensive, including detailed predictions of global and Australian economic and travel trends. It also predicted tourism growth for 1990, 1995, and 2000 for both 'Conservative Development' and 'Potential Development' forecasts for a number of variables at the national and/or state levels (Boeing, 1986).

These reports and plans are examples of the pro-development focus of tourism from WWII through to the 1980s. The focus was on either developing or encouraging the development of access, accommodation and related services and facilities to cater for the ever-growing numbers of tourists. Such development would then increase the benefits received from tourism activity.

2.2.3 Development of the Cautionary Platform

Although the positive picture of tourism remained in the mid-1960s, other opinions began to appear (Spanoudis, 1982). The predominant focus on resource usage without concern for the consequences was progressively questioned as tourist volume and development increased (Manning & Dougherty, 1999). Through the 1970s the search began for ways to attain a balance between tourism and the environment (Briassoulis & van der Straaten, 2000).

An indicator of the growing international concern regarding depleting natural resources generally was the establishment of the Club of Rome and their 1972 report: *The Limits to Growth: A Report for the Club of Rome's Project on the Predicament of Mankind* (Meadows et al., 1972). This report examined the complex issues of the degradation of the environment, along with poverty, urban spread, employment insecurity, the alienation of youth, the loss of traditional values, economic issues, and the loss of faith in institutions (Meadows et al., 1972).

In the same year, the United Nations Conference of the Human Environment (UNCHE) was held in Stockholm, entitled 'Only One Earth' (United Nations, 1972). In the preparation for the conference it was recognised that the environment had only recently become a global public issue (Strong, 1972). The relationship between nature and the activity of humans was considered to have become increasingly complex (Iglesias, 1972). The UNCHE was the first global attempt to respond to environmental degradation (US Government, 1972). The outcomes of this world intergovernment conference on the protection of the environment drove the related activities of the United Nations through the 1970s and 1980s (United Nations, 2001).

In recreation areas increasing visitation resulted in the recognition of the problem of impact among natural resource managers. Clarke and Stankey (1979) proposed the Recreation Opportunity Spectrum (ROS) as a strategy for managing impact so that the psychological and experiential needs of the users was met. Combined with carrying capacity, this strategy developed into the concept of Limits of Acceptable Change (LAC) (Stankey et al., 1985). This process focused on the desired conditions for recreational setting usage. However, it was some time before these insights appeared in the tourism literature (see Butler & Waldbrook, 1991).

Many of the emerging viewpoints regarding tourism impacts were based on an ecological focus and preservation of cultural identity. Additionally, economic benefits began to be questioned, with issues raised regarding seasonality and uncertainty (Spanoudis, 1982).

In 1979, 'Tourism: the good, the bad and the ugly' was released (Rosenow & Pulsipher, 1979). This review of tourism in America provided an frank account of the positive and negative aspects of increasing travel and the growing tourism industry, including travel motivations, economic benefits, the loss of natural and heritage assets, the homogenisation of mass society, the provision of visitor services in National Parks, the effect of marketing, and the need for tourism that is appropriate for the area and does not exceed the carrying capacity of the natural or social environments (Rosenow & Pulsipher, 1979). This book illustrates the changing attitudes of its time, with the realisation that tourism has both positive and negative impacts.

By the beginning of the 1980s, the importance of tourism in the international trade arena had become apparent, along with the recognition that domestic tourism is often even more significant. This provided a context in which the issue of the impacts of tourism was raised (Archer & Lawson, 1982). Examples of the negative effects of tourism began to be described, including economic ‘disbenefits’, and the costs to the environmental and sociocultural elements (Travis, 1982). In the early 1980s tourism was described by Machlis and Burch (1983 p.666) as “a paradoxical human activity – a supposedly ‘smokeless industry’ that produces littered beaches, a cornucopia to local economies that gives rise to inflation and embittered natives, a profitable enterprise that often requires governmental subsidy”. Ultimately the relationship between tourism and the environment became a focus of academic tourism research through the 1980s (Briassoulis & van der Straaten, 2000).

Although it was recognised that there was a need to determine the impacts of tourism there was very limited data available. In many cases data on the volume of tourists was unavailable, anecdotal, or unreliable (Coppock, 1982). An additional difficulty with determining the costs and benefits associated with tourism was the limited number of variables that lend themselves to measurement (Duffield, 1982). Although economic aspects were often measurable, environmental and social factors are problematic (Coppock, 1982; Duffield, 1982).

Recognition of the negative physical and social impacts caused by tourism was reviewed in detail by Mathieson and Wall (1982), and has continued to be discussed. Early research questioned the balance between the positive economic benefits and the realisation of the negative social and environmental impacts (Cohen, 1982). This resulted in specific studies on the impact of tourism. Much of this research focus has been on the impacts of tourism on the environment (Farrell & McLellan, 1987; Romeril, 1989; Boers & Bosch, 1994; Kearsley, 1997; Briassoulis, 2000), particularly in recreation settings (Shelby & Heberlein, 1986; Buckley & Pannell, 1990). Social and cultural impacts have also been reviewed in a variety of contexts (de Kadt, 1979; Pigram, 1987; Craik, 1991; Beaumont, 1997; Page & Lawton, 1997; Louw & Smart, 1998; Carter, 2000; Carter & Beeton, 2004). In addition, many books discuss social, environmental and economic impacts (Gunn, 1979; Pearce, 1989; Hall, 1991, 1995; Leiper, 1995; Mercer, 1995; Hall, 1997; Tisdell & Roy, 1998; Newsome et al., 2002; Mason, 2003).

According to Duffield (1982), existing studies of physical impacts often highlighted the negative effects of tourism, while studies of the economic impacts focused mainly on the benefits of such activity. Overall the social impact of tourism was considered largely under-researched (Duffield, 1982). A review of over 100 research papers on the impacts of tourism by Travis (1982) confirmed and challenged Duffield (1982). The majority of studies reviewed by Travis (1982) focused on the benefits, including both the economic and environmental realms. Secondary consideration was given to the costs of the sociocultural and political impacts of tourism. Another finding of Travis's (1982) review was the extensive list of negative environmental impacts, with only a short list of environmental benefits. Additionally, the extent of the cultural impacts from tourism appeared to be dependent on the critical scale, number, status, and attitude of the visitors.

Looking back it can be seen that acknowledgment of the negative impacts caused by tourism resulted in a significant shift in focus (Foley et al., 1997). A conclusion reached by Travis (Travis, 1982) in the early 1980s was that tourism, as the cause of negative impacts, needed to take responsibility through proactive management, ensuring net benefits for the host community and environment, as well as for the tourists. Coping with the negative environmental and social costs of tourism required additional effort and resources, and as this was often considered to be the responsibility of the government, their view of encouraging tourism for economic benefits also began to shift (Spanoudis, 1982). This new attitude which challenged the existing pro-tourism development approach was termed the 'cautionary platform' by Jafari (1990).

However there was not a universal shift in attitude. Those supporting tourism development considered conservation to be a threat to the viability of tourism businesses and future tourism growth, while the conservationists perceived tourism growth and the tourists themselves to be threats to the natural landscapes and the wildlife within (Coppock, 1982). This was made more complex by the conservation movement often advocating tourism as the alternative industry to natural resource exploiting industries, such as mining of Fraser Island and Cooloola, and logging in the Wet Tropics (University of Queensland, 1971; Sinclair, 1994; Doyle, 2000; Driml, 2000; Hardy & Beeton, 2001). The range of such examples is huge and international. In many ways local tourism initially benefits from the publicity of such controversies (Hundloe et al., 1988). It is subsequent success that is problematic. Despite these varying perspectives, both conservationists and tourism

developers were bonded by the understanding that tourists may destroy the appeal of the destination (Coppock, 1982).

Almost by definition, tourist destinations have natural and cultural attractions that are likely to be sensitive to change, whether it be ecological, social or economic (Duffield, 1982). In fact the physical environments that are susceptible to change are usually the ones most attractive to tourists. This is also true for the social realm, with tourists attracted to the less developed societies, which are vulnerable to change (Duffield, 1982). The conundrum is that tourism activity with negative impacts could ultimately destroy the features that had attracted tourists in the beginning, ultimately destroying both tourism and the environment (Spanoudis, 1982).

Duffield (1982) recognised that within tourism there exists “a basic economic and social contradiction: the very phenomenon which has been adopted as a tool for regional development, as an employment and income generator, often depends on the maintenance of the social, cultural and environmental characteristics of the society it is meant to change” (Duffield, 1982 p.254).

By 1982 it was accepted that tourism caused environmental impacts and the question had become ‘What impact is acceptable?’. However, it was realised that this was a ‘highly emotive topic’ (Coppock, 1982). In an attempt to determine a threshold, tourism began to draw from environmental management. This area of specialisation developed within the ecology, natural resources management, and planning disciplines. It aims to provide knowledge which can be used to manage human activity in natural areas, such as in National Parks, more effectively (Manning & Dougherty, 1999). Key concepts within environmental management include Environmental Impact Assessment (EIA) (US Government, 1969; Thomas, 1998), LAC (Stankey et al., 1985; Nilsen & Taylor, 1997; Newsome et al., 2002), environmental monitoring (Meijers, 1986; Erickson & King, 1999; Manning & Dougherty, 1999; Newsome et al., 2002), and carrying capacity (Wagar, 1964; Brown et al., 1978; Shelby & Heberlein, 1986; Romeril, 1989; Stankey & McCool, 1989).

Environmental Impact Assessments (EIAs) aim to predict the effects of particular activities or developments, to determine what, if any, development should proceed and what amendments may be required. The EIA process became a requirement for major projects in

numerous countries after the introduction of the National Environmental Policy Act (NEPA) in the US in 1969 (Glasson et al., 1999). By the early 1970s EIA procedures were starting to be introduced in various ways across the states of Australia. In 1973, the Australian Environment Council reviewed the opportunities to establish EIA procedures at the national level, ultimately resulting in the passing of the Commonwealth Environment Protection (Impact of Proposals) Act the following year (Thomas, 1998). This Act required the preparation of Environmental Impact Statements (EISs) for proposals which could have significant environmental effects, and are federally funded or approved (Thomas, 1998). In mid 2000 the Environment Protection and Biodiversity Conservation Act 1999 came into force. This Act includes 'Assessment by Environmental Impact Statement' as one of the approaches in the approval process (Department of Environment and Heritage, 2004). In Queensland the Integrated Planning Act 1997 forms the planning and development legislation for the State. Its Integrated Development Assessment System streamlined the previous multitude of approval processes. Under the Act an impact assessment involves a broad assessment of the environmental effects of the proposal (Department of Local Government and Planning, 2004). However, in some places worldwide, the EIA process became a simple review, without consideration of alternative options, off-site impacts, or social aspects. Additionally the results of the EIAs have not always been utilised in the decision making process (Manning & Dougherty, 1999).

The concept of the LAC was developed by Forest Service researchers in the US in the mid 1980s to respond to the environmental impacts of the increasing recreational use of wilderness areas (Stankey et al., 1985). This planning framework is a flexible process involving nine interrelated steps which establish a set of resource and social conditions and the actions required to achieve these standards (Stankey et al., 1985). The LAC process has been applied to wilderness areas, scenic rivers, historic sites and tourism development areas (Nilsen & Taylor, 1997). However there has been some hesitancy in setting standards in the application of the LAC process. This the framework also requires monitoring and evaluation, which can be used to redefine the standards as the information base increases (Newsome et al., 2002).

The concept of environmental monitoring began to appear progressively in the literature after the United Nations Conference on the Human Environment at Stockholm of 1972 (Meijers, 1986). Environmental monitoring is the process of repetitively recording elements

of the environment according to a predefined schedule and utilising comparable methodologies (Meijers, 1986). Such a process can be continuous or periodic, and often compares the predicted effects with the actual impacts to recommend changes where appropriate (Erickson & King, 1999; Manning & Dougherty, 1999). Relevant to tourism is the application of monitoring to the effects of visitors in natural areas, such as National Parks. This is considered vital to protect the environment and ensure quality visitor experiences are maintained (Newsome et al., 2002).

Carrying capacity is an estimate of the biophysical limits of natural resources, with usage conducted at or below the estimate (Manning & Dougherty, 1999). The concept of carrying capacity was initially used in animal husbandry, wildlife management and range management (Shelby & Heberlein, 1986). It was converted from animals to people by the US forest recreation planners, taking on an additional psychological dimension (Wagar, 1964; Brown et al., 1978; Stankey & McCool, 1989).

The application of the carrying capacity concept to development is “the degree to which an area can be used for economic activity without degrading the environment there or the interactive harmony between sectors of the economy, groups of people, and individuals” (Manning & Dougherty, 1999 p.4). Ultimately, every region where economic activity occurs has limits beyond which it can be dangerous to step. These limits define the carrying capacity (Manning & Dougherty, 1999).

The theory of a threshold level is appealing as it is easy to conceptualise. However, in reality it is problematic to operationalise (Romeril, 1989). It appears easier to determine numerical limits for animals as a biophysical resource is involved. The application of carrying capacity to humans is not as simple, because psychological factors are also involved. In addition there can be different capacities for the various types of impact: ecological, social, physical, and facility (Shelby & Heberlein, 1986). Ultimately there are many definitions of carrying capacity and all these estimates involve value judgements. Such judgements are inherently likely to generate conflict (Shelby & Heberlein, 1986).

Within tourism, carrying capacity is considered to be the level of tourism impact (physical, biological and/or social) an area can absorb before irreversible damage occurs. Typically the aim is to measure carrying capacity against the total number of tourists using the

particular area to determine if a predetermined threshold has been reached or exceeded (Steele, 1995). According to Butler (1997), in many destinations the carrying capacity has already been exceeded, irrespective of how 'carrying capacity' is defined.

One reason why the tourism carrying capacity is difficult to define is that carrying capacity can differ across various destination elements, such as facilities and infrastructure, physical space, natural resources, visitor satisfaction, and visitor numbers (Hovinen, 1982). Capacity levels are affected by the types of tourists and the destination area itself (Mathieson & Wall, 1982). The tourism carrying capacity can also be considered from the perspective of the host community, or the tourists themselves (O'Reilly, 1986). Additionally each tourism and environment combination differs, resulting in destination specific carrying capacity (Romeril, 1989). Other difficulties in defining tourism carrying capacity include the multiple attributes of the environment which have their own thresholds; the environmental response to increased usage may be gradual or dramatic; environmental sensitivity relates to the values of the users; and the type of use can change the level and type of impact (Manning & Dougherty, 1999).

In addition to being difficult to define, the tourism carrying capacity can change over time as the destination progresses through its life-cycle (Hovinen, 1982; Martin & Uysal, 1990), and is affected by underlying system changes such as seasonal variations, climatic combinations, and the level of tourism demand (Collins, 1999).

As a single numerical carrying capacity for an area is seldom appropriate (Manning & Dougherty, 1999), and defining an actual carrying capacity for an area is difficult, it is rarely undertaken (Collins, 1999). However, tourist saturation requires measures of control to ensure that the volume of visitation occurs within the limits of the area (Gunn & Var, 2002).

The recognition of the issues of sustainable development, tourism impact, limits of acceptable change, and carrying capacity, through the 1980s, provided growing support for the 'cautionary' approach to tourism. At the end of the 1980s, it was stated that "few, if any, would deny that tourism development can be a force causing much irreversible damage to the environment" (Romeril, 1989 p.204). Despite this, the 'advocacy' approach continued to drive much of the development, with the focus on the positive benefits of tourism.

2.2.4 Development of the Adaptancy Platform

The debates between supporters of the advocacy and cautionary perspectives were primarily focused on the impacts of tourism. This led to the realisation that certain types of tourism activity result in fewer negative impacts. There was considered to be a need for alternate forms of tourism development that correlate with the resources available and the opportunities provided (Pearce, 1989). This provided the basis for a third approach, characterised initially as the 'adaptancy platform' by Jafari (1990). In so doing Jafari articulated much of the subsequent tourism debate and research direction. Ultimately, this approach generated a range of 'low impact types of tourism', with labels including alternative, green, soft, sustainable, responsible, appropriate, as well as ecotourism.

An underlying reason for the change in perspective was the growing realisation that the level of environmental quality is a vital asset for tourism. Ultimately tourism and the environment are intrinsically interdependent (Boers & Bosch, 1994). In particular, tourism, more than other economic sectors, is dependant upon and sensitive to the natural and human qualities of the environment (Manning & Dougherty, 1999). Some argue the long-term viability of tourism activity is reliant on the maintenance of the natural and cultural environments (Singh & Singh, 1999). The 'adaptancy platform' therefore emphasised this 'mutual dependence' between the environment and tourism (Foley et al., 1997). It is recognised that this is clearly a simplification as some totally artificial environments, such as Las Vegas, are successful destinations. However, the aims of tourism and nature conservation are different. Tourism is intrinsically attraction driven and hence specific natural attractions are overemphasised for tourism.

The trend of growing environmental awareness in tourism reflected the wider environmental trend within society. Public interest regarding the state of the environment rapidly increased from the 1980s (Boers & Bosch, 1994), evident by such detailed research as the recent State of the Environment assessment (Australian State of the Environment Committee, 2001). Environmental management is no longer just the focus of a few enthusiasts, it is now supported by tourism developers, planners, and policymakers. In addition, tourists have become aware of the environmental and social impacts of tourism, and are making their views known (Gunn & Var, 2002).

2.2.5 Development of the Knowledge-Base Platform

The increasing discourse on tourism development and its impacts, illustrated by the rise of the advocacy, cautionary and adaptancy platforms, resulted in changes in general thinking regarding tourism (Jafari, 1990). Irrespective of the viewpoint, there was consensus that tourism is a very large and enduring global industry, that focus needs to be on the relationship between the positive and negative impacts of tourism activity, and finally that tourism needs to be studied as a whole (Jafari, 1990).

Thinking regarding the relationship between impacts follows recognition that a significant problem is the cumulative effects of impacts. When development occurs as a number of small increases gradually over time EIAs are rarely undertaken. This unplanned cumulative development can have significant impact, resulting in 'disaster by creeping instalments' (Manning & Dougherty, 1999). Although it can be an individual tourism development that causes significant environmental impacts, it is often the 'collective development of mass tourism' that causes an aggregate impact (Gunn & Var, 2002).

The changing views on tourism development and the growing understanding of the resultant impacts of tourism activity affected the approaches and development of tourism planning, including the incorporation of the concept of sustainable tourism. Applying the principles of sustainable development, the knowledge-based approach aims to achieve economic, environmental, and sociocultural sustainability. Such an aim requires consideration of the relationship between the positive and negative impacts of tourism and the trade-off between various impacts (Section 1.2.3).

Also illustrating this knowledge-base platform is the ongoing application of systems theory to tourism. A systems approach aims to increase understanding of the structure and function of the tourism system, and its role in the wider social and economic systems. The application of this approach will be discussed in Section 2.3.2.3.

2.2.6 The Ongoing Debate - Tourism Impacts

Getz (1986) observed that predictions regarding the magnitude of the impact or the subsequent repercussions were beyond the scope of the models of the 1980s. The outcome

of subsequent research on tourism impacts has been the generation of strategies for eliminating or minimising negative impacts. Suggested 'solutions' for minimising the impact of tourism on the environment can be broken into four categories; curb tourist numbers, change tourist type, change the resource for resistance, and educate all concerned (Butler, 1991). As a result better planning now exists to lessen the negative impacts of tourism activity (Gunn & Var, 2002). In particular, comprehensive impact models are used to identify possible impacts for an area.

Although the four platforms (advocacy, cautionary, adaptancy, and knowledge-base) were developed at different times they were not a sequential evolution (Jafari, 1990). Instead they represent different viewpoints and their supporters continue to advocate the advantages of their approach to tourism (Figure 2.2). There are currently advocacy supporters who promote the positive impacts that tourism has, especially as traditional industries decline and alternative resource usage can be significantly more exploitative. Additionally, the cautionary view is maintained by many involved in conservation, natural resource management and those concerned about the dramatic changes to traditional societies induced by tourism activity. Aiming to balance the impacts are supporters of the adaptancy platform. This approach of maximising the positive benefits and minimising the negative impacts of tourism activity has been incorporated into the wider tourism planning arena. The knowledge-base platform considers tourism as a whole, and is evidenced by the increasing use of systems approaches to understanding tourism development.

To date research has not provided an understanding of the complexity of destination change or a comprehensive set of guidelines which can be applied to a potential or expanding tourism destination to ensure a sustainable form of tourism results. Although the knowledge-base platform recognised that tourism needs to be viewed as a whole, tourism is an exceeding complex system that is embedded in the even more complex economic and social systems. In addition tourism has complex supply chain linkages to source markets and is both local and global in character. Consequently it is a candidate for a systems approach.

2.3 Tourism Systems - Varying Perspectives

An approach that incorporates all internal and external influencing factors is required to understand the processes of change within a tourism destination. The approach selected for this study is Systems Theory. Application of this approach defines the tourism destination as a system of interrelated parts, operating within the wider systems of the national and international societies and their economies. Additionally, the application of Systems Theory in this study provides a basis for determining which of the available process of change theories discussed in this chapter are applicable to understanding the development of tourism destinations.

2.3.1 Transdisciplinary Theories and Tourism

The initial development of transdisciplinary approaches expanded into and was formalised as theories such as the General Systems Theory (von Bertalanffy, 1968) and the General Theory of Evolution (Csanyi, 1989; Laszlo, 1991). Such transdisciplinary concepts are significant for the study of tourism. In contrast to the tradition 'science of parts', these approaches can be considered the 'science of the integration of parts' (Abel, 1998, 2000).

Firstly, as tourism is an open, complex, and dynamic system a holistic view is required to understand the destination change. Secondly, tourism is a relatively new field of study without established methodologies, theories, models, or methods (Leiper, 1981). This has resulted in the multidiscipline study of tourism, and caused the 'borrowing' nature of tourism research, which incorporates methodologies, theories, models, and methods from various disciplines (Cohen, 1979; Bodewes, 1981; Jafari & Richie, 1981; Leiper, 1981; Jafari, 1990; Leiper, 1990). The primary advantage of the borrowing approach is that the main theoretical and methodological work has been done, although this is coupled with the drawback that the perspective may not suit the context (McKelvey & Aldrich, 1983). The positive opportunity for tourism research is the potential to 'borrow' a broad approach that can incorporate all the component parts that are often viewed in isolation.

Given that the focus of this study is to further understand the development of tourism destinations, general theories on the ways in which complex systems evolve are most

applicable. General Systems Theory (von Bertalanffy, 1968) and its application to this study is discussed in the next section.

The second transdisciplinary theory, the General Theory of Evolution, resulted from systemic attempts to understand the way complex non-linear systems function. There was realisation that “organisms co-construct their world rather than passively adapt to it, resulting in the conclusion that organisms are inevitably a part of what they observe, not separate from it” (Midgley, 2000 p.3). Section four of this chapter will consider two of the relevant theoretical concepts of change within the General Theory of Evolution: Punctuated Equilibrium and Chaos Theory.

2.3.2 A Systems Approach

The basis of the development of systems thinking was the recognition of the complex behaviour that is exhibited in natural and human systems (Beishon & Peters, 1972). General Systems Theory is therefore used to describe the way that individual elements interact and ultimately affect the function of the whole system of elements.

Current systems theory incorporates numerous concepts and models into a transdisciplinary ‘metalanguage’ (Francois, 1999). This has occurred through an accrual process from various disciplines over the past century. However, the majority of contributions have been since 1948, and are continuing at an accelerating pace (Flood & Jackson, 1991b; Francois, 1999). Not only have these contributions been from multiple fields of knowledge, but this convergence has promoted and assisted unification between disciplines (Kast & Rosenzweig, 1972).

This was a significant change from the previous ‘mechanistic’ science, which considered that “everything can be observed and described as if it is a machine – a predictable, functional, inherently understandable object seen from a discrete distance by an independent subject” (Midgley, 2000 p.2).

2.3.2.1 Systems Theory - Development and Application

In 1950 Ludwig von Bertalanffy proposed the term ‘General Systems Theory’ to encompass some of the developing principles of his time that could be applied by various disciplines and to differing levels (Katz & Kahn, 1978). As a biologist von Bertalanffy realised it was necessary to reach beyond biology to integrate concepts and evidence from alternate specialisations to fully understand his research topics (Leiper, 1990). In addition von Bertalanffy was the first to make the distinction between open and closed systems (Carlsen, 1999).

Other contributors of this time included Weiss, Rapoport, Boulding, Wiener, von Neumann, von Forster, Miller and Ashby (Katz & Kahn, 1978; Laszlo, 1991; Francois, 1999). Although it was initially considered a general abstract theory, by the early 1970’s it had become recognised as a legitimate interdisciplinary approach despite some limitations and varying applications (von Bertalanffy, 1972), and resulted in a change in the thinking and approaches in many of the sciences (Beishon & Peters, 1972).

General Systems Theory recognises that there are limitations in looking at how two components affect each other by considering them as two individual components linked by a causal or correlative relationship. The contribution of the theory is to consider how multiple components act together if exposed to concurrent, multiple influences (Laszlo, 1972). The focus is therefore on the relationships between the components of the system, in terms of how the components fit together and how they interact (Ackoff, 1972). The components of a system and these interconnections between them distinguish the system from other systems and the external environment. It can therefore be understood that the “system and component mutually determine each other” (Csanyi, 1989 p.1). It is therefore not possible to understand complex systems by simply analysing its parts (Cilliers, 1998).

As a result of the increasing methodologies, a range of systems approaches developed (Figure 2.3), including first-order cybernetics (‘hard’ systems methods), and second-order cybernetics (‘soft’ systems methods) (Ison et al., 1997). Hard systems methods focus on mathematical models of feedback, control, and communication, while the soft systems view incorporates the understanding that the same system can be considered differently by various stakeholders (Ison et al., 1997). These various system approaches are applicable to different types of problem contexts (Flood & Jackson, 1991a).

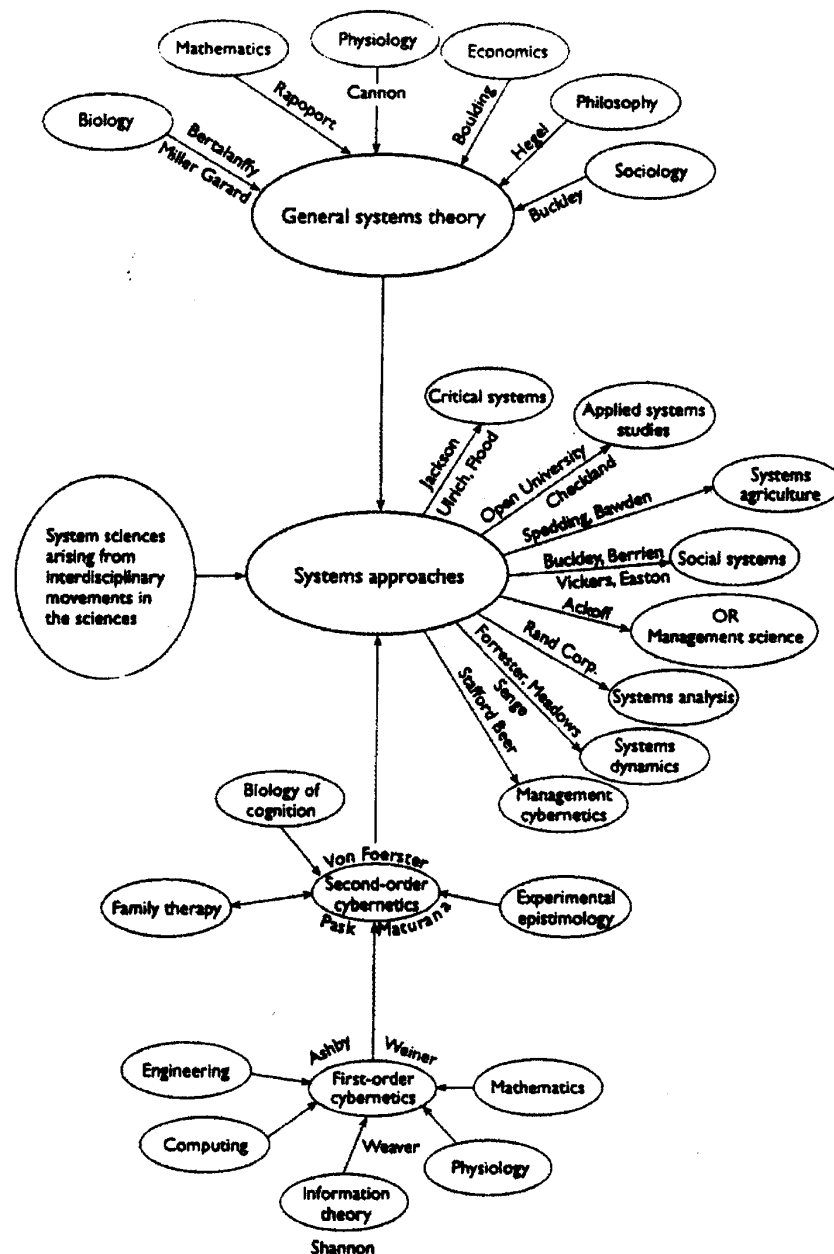


Figure 2.3 Systems Approaches. The numerous systems approaches that comprise modern systems thinking have developed from a diverse range of disciplines through the contributions of many researchers and theorists (Ison et al., 1997).

When investigating a system Katz and Kuhn (1978) perceive the aim to be the identification of the ‘framework’ and the ‘clockwork’ of the system. The framework is essentially the structure of the system. Understanding this structure provides the opportunity to improve the design of the system (Checkland, 1972). Clockwork relates to the system elements, considering their function and the interaction between them. Investigation of a changing

system builds on this knowledge, describing the changes in the properties of the system that result from internal or external changes (Katz & Kahn, 1978). As the relations between elements can become extensive for more complex systems, it is important to understand these interactions.

When considering the type of change that occurs within a system, the change can be categorised as either first or second-order change (Ison & Russell, 2000). First-order change is primarily 'more of the same'. Inputs and outputs vary creating change, however this change occurs within the existing and established framework of the system. Second-order change modifies the whole system. This may lead to some additional inputs and outputs and/or the loss of others. Importantly, this causes change to occur in a 'changed' manner, as it affects both the outcome as well as the process (Ison & Russell, 2000). The differentiation between first and second-order change is significant for the next section of this chapter which presents theories on the processes of change. Species Evolution can be considered to explain how first-order change can occur, while Punctuated Equilibrium addresses the restructuring of a system or second-order change.

The constant interactions between the elements within systems results in their dynamism. It has been proposed that a system cannot operate, or exist without some constraints, and yet there needs to be some mechanism that allows a system to adapt and redefine the limits. This results in a system of interrelated elements that can oscillate and settle between gradually changing and self-defined limits of stability. This outcome implies a level of organisation of the elements and all their relations within a system. The organisation of a system is defined by the totality of the relations rather than the nature of the elements (Rapoport, 1985). The elements themselves, when combined within a certain system lose some of their original significance and/or characteristics, but they attain alternative ones (Francois, 1999). As a result, a small difference between similar systems can significantly affect the role of various elements. This may explain the differences between the development of tourism in apparently similar environments.

The role of information as a link between elements within a system has received some attention and is relevant to the understanding of the tourism system. Weiner (1948) considered the amount of information within a system that is available to the community versus the amount available to the individual. Additionally he contends that the community

system only extends as far as effective communication occurs. When considering the relationship between the quantity of organisation and quantity of information, Rapoport (1985 p.137) determined that the “more organised a structure or a process is, the less information is required to specify it completely”. Tourism has been considered an information system (Beeton et al., 1997). Such an approach may assist in defining the extent of a tourism destination, rather than using geographical limits, as well as generating understanding of the level and type of organisation that exists within a destination.

Unlike the realm of biology, a social system does not usually possess a physical boundary and the mutually influencing links are fewer and less perfect (Katz & Kahn, 1978). A social system is in fact a structuring of events, ensuring that the structure of the system is actually its function (Allport, 1962). Additionally a social system is based upon humans, with their attitudes, perceptions, beliefs, motivations, habits, and expectations (Katz & Kahn, 1978). This is particularly pertinent for the tourism system, which involves consumer preferences and a range of stakeholder interests, from the tourist operations to regulators and the host community (Murphy, 1983; Woodley, 1993; Jamal & Getz, 1995; Bramwell & Sharman, 1999; Sautter & Leisen, 1999; Brown et al., 2001; Hardy & Beeton, 2001; Machiavelli, 2001; Jamal et al., 2002).

2.3.2.2 Systems Classifications and Tourism

A significant aspect of a systemic method is the incorporation of complexity, whether it be organic, cultural, power, or other forms of complexity (Mwaluko & Ryan, 2000). This issue of complexity within systems was realised in the early stages of systems thinking. In the mid 1950s Boulding (1956) proposed a hierarchy of systems, presenting eight levels of complexity:

1. Frameworks of static structure
2. The clockworks of physics and astronomy
3. The control mechanism or cybernetic system
4. The cell or self-maintaining structure
5. The genetic or plant level
6. The animal level with purposive behaviour and self-awareness
7. The human level
8. Social organisation or individuals in roles (Boulding, 1956 pp.14-16).

At that time appropriate theoretical models were established for only the first four levels of complexity (Boulding, 1956). This partially explains why the early systems research generally focused on biochemical and biological phenomenon (Katz & Kahn, 1978). As tourism involves social organisation, it fits into the highest level of system complexity on this scale.

The complexity of a system can be viewed in terms of its level of detail and dynamism (Senge, 1990). Detail complexity relates to the number of parts or elements within the system. Dynamic complexity considers the interaction and feedback between all the parts of the system and between the system parts and the external environment (Senge, 1990). These links between elements of a system are an inherent aspect of systems theory. Complex systems are considered 'richly joined' as it is not possible to simply vary one factor at a time (Ashby, 1956). The interactions are dynamic and interconnected. A tourism destination can be considered to have a high level of both detail complexity and dynamic complexity. A destination is comprised of numerous elements, including tourism and related operations, local people, associations and government bodies, and the tourists. Tourism by nature necessitates interaction between tourists and other elements of the system. Tourism operators also interact, as they are affected by similar competitor operations, and yet often link with complementary operators. Additionally a destination can be directly affected by changes in the internal and external environments, including business, economic, government, and social factors. A destination requires continual interaction with the external environment as tourists, by definition, are away from their normal environment. This generates a high level of interaction and feedback between the parts of the system, as well as with the external environment.

Determined by its characteristics, a system will lie along a continuum of system types that extends from relatively simple systems to those that are highly complex (Flood & Jackson, 1991a). Relevant for this study are the general characteristics of complex systems:

1. Consist of a large number of elements.
2. Many interactions between the elements. This interaction is fairly rich as any element influences, and is influenced by, quite a few other ones.
3. Elements interact in a dynamic way. As a result, complex systems change over time.
4. The interaction can be non-linear in nature.

5. The interactions normally have a fairly short range; i.e. elements receive information from their immediate neighbours.
6. There are feedback loops in the interactions. The efforts of any action taken by a certain element can feed back onto itself.
7. Interaction between elements is loosely organised.
8. The attributes of the elements are not predetermined.
9. Each element in the system is ignorant of the behaviour of the system as a whole; it responds only to information that is available to its locality.
10. Subsystems are purposeful and generate their own goals.
11. Largely open to the environment.
12. Operate under conditions far from equilibrium.
13. Probabilistic in their behaviour.
14. Have a history.
15. Subject to behavioural influences.

(Flood & Jackson, 1991a p.33; Cilliers, 1995 p.125).

Tourism destinations possess characteristics of a complex system. There are numerous elements which interact in a loosely organised manner, communicating with and affecting other elements in the system that are linked to them. This interaction changes over time as the destination evolves. The destination system itself is affected by its social components that are subject to behavioural influences, and the system operates under conditions far from equilibrium, while being affected by the external environment.

In addition to classifying a system as either simple or complex, social systems can also be typed by the relationships between participants (Flood & Jackson, 1991a). Utilising industrial relations terminology, the three categories of Unitary, Pluralist and Coercive (Table 2.1) are determined by the extent of common interests, values, aims, objectives, methods and decision making of the participants (Flood & Jackson, 1991a). Applying this classification, tourism destinations can be considered to range from pluralist to coercive depending on the extent of division between stakeholders.

Table 2.1 Classification of Social System Relationships.
Relationships between participants in social systems can be classified into one of three categories. The type of relationship assists in defining the problem context of the system. This can be used to determine which particular systems approach is most appropriate (Flood & Jackson, 1991a p.34).

	Unitary	Pluralist	Coercive
Interests	Common	Basic compatibility	Not shared
Values and beliefs	Highly compatible	Divergent	In conflict
The ends and the means	Largely agreed upon	Do not agree, but compromise possible	Disagree, and compromise not possible
Decision making	All participate	All participate	Some coercion to accept decisions
Objectives	Agreed objectives	Agreed objectives	No agreement

Determining the overall type of system (Simple/Complex) and the participants relations (Unitary/Pluralist/Coercive) defines a problem context for which particular systems approaches are more appropriate (Flood & Jackson, 1991a). For example a Complex-Pluralist combination is aligned with either an interactive planning approach or soft systems methodology. However a Complex-Coercive context is considered beyond the systems methodologies available (Flood & Jackson, 1991a). This provides a rationale for why the development and/or management of tourism destinations with apparently unresolvable differences between stakeholders is so difficult (see for example the study of the Daintree Region in Far North Queensland, Australia (Hardy & Beeton, 2001)).

The general nature of the core meaning of the term 'system' allows systems to vary extensively in their detail. Jordan (1981) has proposed a method of classification, whereby a system can be categorised on three 'bipolar dimensions' which establish it as one of eight system types (Figure 2.4). Firstly, if a system changes over time or during analysis the focus is on the 'function' of the dynamic state, rather than the 'structure' of the static state. As the form of tourism within a destination evolves over time the tourism system can be categorised as functional. Secondly, systems can be categorised as being either 'purposive' or simply existing ('non-purposive'). A tourism system is established in a destination to achieve various benefits, deeming the system to be purposive. Finally, a system, as a set of linked elements, may or may not be affected by the change or removal of one part or connection. If unaffected, the system is considered 'mechanical', while felt repercussion indicate that the system is 'organismic'. Tourism within a destination can be significantly

affected by a change in one element or a link between elements, which can occur either within the tourism destination, or in the external environment. The tourism system is therefore organismic. Of the eight possible combinations, the system created by tourism can be hypothesised as being functional/purposive/organismic, as illustrated by the shaded area in Figure 2.4 (Jordan, 1981).

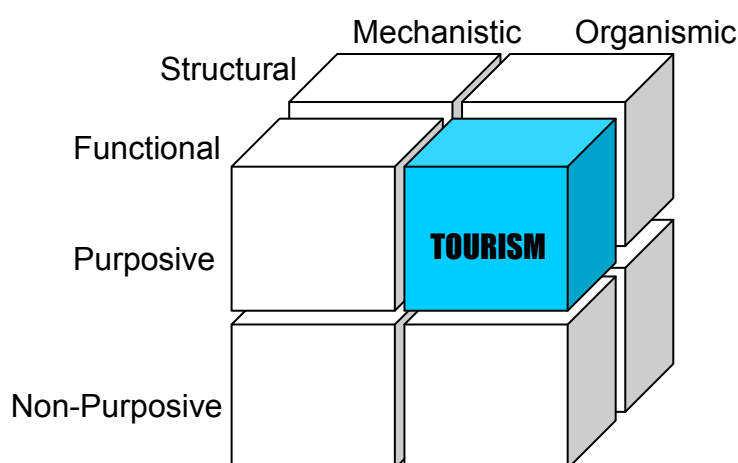


Figure 2.4 System Classifications.

Representation of the tourism system within the system classification that is based on the emerging taxonomy proposed by Jordan (1981). Of the eight possible system classification options, the tourism system can be considered to be purposive, functional, and organismic (as shown by the shaded box).

If the tourism system can be considered functional, purposive, and organismic, then the theory being used to understand it must be appropriate for this type of phenomenon. Each of the four process of change theories will be considered in light of this requirement in the fourth section of this chapter.

2.3.2.3 Tourism as a System

Tourism is not just a business, an industry, an activity, a market, an economic resource, an experience, or a phenomenon to be studied. It has a set of ideas and resultant behaviours which create the system (Leiper, 1979, 1990, 1995). Tourism can be considered a system as it exemplifies the core meaning of a system: it is an entity that is perceived as containing multiple elements that are connected by at least one distinguishable link (Jordan, 1981). As a result it has been proposed that tourism should be analysed as a system, instead of as a market or industry (Lumsdon, 1997).

The traditional approach to tourism destination management has been reductionist, that is the research is centered on a particular variable, such as visitor numbers, or discrete relationships between variables, such as tourist expenditure and employment (Carlsen, 1999). As tourism is a complex system with numerous interrelated parts, it can be argued that understanding destination development, and management of the change, requires a systemic approach.

The general development and application of a systems approach resulted in the identification of the system created by tourism (Board et al., 1978; Leiper, 1979; Mill & Morrison, 1985). This way of thinking assists in the clarification of complex phenomenon, such as tourism, that cannot be studied by other methods from the physical sciences because they are not closed systems (Leiper, 1990). Applying a systems approach to tourism highlights the significance of its interrelated parts, whereby a change in one causes reverberations to reach the others (Mill & Morrison, 1985). This perspective allows one element to better understand its role and to be proactive, by recognising or predicting influential changes in alternate sectors of the system.

In their study of the capacity pressures due to increasing self-drive weekend recreation in Britain and the need for recreation management principles, Board, Brunsdon, Morgan, Morly and Thornes (1978) devised a 'tourist system' for the destination under study. Recognising the complexity of the situation this tourist system "consisted of concentrations of visitors (nodes) and road networks (links)" (Board et al., 1978 p.46).

Applying a holistic approach, Leiper (1979; 1981; 1990) considered the tourism system to be composed of three fundamental structural elements. The first, a human element is the necessary requirement of a tourist. Secondly, three geographical elements are incorporated: the generating region, the transit route, and the destination. The final element is industrial, commonly known as the travel and tourism industry. This tourism system then operates within the wider physical, cultural, social, economic, political and technological environments (Leiper, 1979, 1981, 1990).

As an alternate approach to understanding the tourism system, Gunn (1979; 1988) and with Var (2002), consider the combination of supply and demand, defining the 'tourism functioning system'. This incorporates the market, as the demand component, and

transportation, attractions, services, and information/promotion as the supply side components.

Applying a systems approach to tourism planning Murphy (1983) incorporated the four main components of human activity (patterns and preferences), communication (image and information), space (urban, rural or coastal), and time (stage of development). An advantage of such a planning approach is that it is applicable at various levels and the emphasis can change depending on the circumstances (Murphy, 1983).

In their book titled 'The Tourism System' Mill and Morrison (1985; 1992; 1998) take a marketing orientation and describe the tourism system as the composition of four parts: market/demand, travel, destination, and marketing. This system, which has evolved over time, also considers the relations between the parts. For instance, marketing links the destination and the market as it is used to sell the destination/products to the marketplace (Mill & Morrison, 1985, 1992, 1998). This systems approach to tourism was considered appropriate as it highlights the interdependency within tourism; it's open system nature; the levels of complexity and variety; competitiveness; friction and disharmony, as well as the responsiveness of the parts (Mill & Morrison, 1998).

Another approach has been to focus on the human elements. Miller and Ditton (1986) perceived the tourism system as involving a host culture, a guest culture, and a management culture, composed of relevant public sector government officials at all levels, and the private sector business people within the travel and tourism industry.

Not only should tourism be viewed as a system, it is in fact a system whose parts are systems in their own right. Jafari (1987) proposed that tourism is a 'megasystem', comprising the generating or ordinary system and the receiving or non-ordinary system. This megasystem also incorporates the sociocultural dimension. The generating system, or day-to-day ordinary life, provides the impetus to leave and the mobilisation to do so. The receiving system, or non-ordinary world, restores, uplifts, and fulfils the exhausted physique (Jafari, 1987).

In that same year Chadwick (1987) proposed the 'travel and tourism system'. A novel aspect of this system was the inclusion of 'objectives', or reasons for travel. The three part

system incorporated the 'people', who require 'services', to achieve 'objectives'. Each part was then separated into its main type, for instance objectives were business, VFR, other personal business, and pleasure (Chadwick, 1987).

Poon (1993) described the tourism system as a 'systemic flow of production' by the key industry areas to the consumers. The three industry areas were defined as producers, such as airlines and hotels; distributors, including travel agents and tour operators; and facilitators, which provide financial services to the consumers (Poon, 1993). In addition to this general tourism system Poon (1993) proposed a 'tourism production system' which incorporated the dual functions of service, through production and delivery; and information, through management and distribution.

Considering tourism as an open system Liu (1994a; 1994b) focused on the three levels of the internal environment, the operating environment, and the macro environment. The internal environment comprises policy, planning, marketing, organisational, financial and human components, while the operating environment incorporates the tourists, suppliers, competing destinations, and competing industries (Liu, 1994b). In this approach the variables considered for each component may be useful as triggers, or change factors to measure (Cooper, 1994).

In addition to his previous work on the holistic tourism system (Leiper, 1979, 1981, 1990), Leiper also focused on the 'tourist attraction system' (Leiper, 1995). This system is in fact a necessary subsystem of a whole tourism system. An important contribution of this approach was the incorporation of a marker, or information received by the tourist about the nucleus (site, sight, event, phenomenon, etc). These three elements, the tourist, the marker and the nucleus comprise the tourist attraction system (Leiper, 1995).

Also applying a systems approach Van den Bergh (1996), in his study of island impacts, utilised a model incorporating economic activities (accommodation, tourism services, construction, local services, agriculture, fisheries), people (demography, housing development, tourist flows, labour market), terrestrial (land use), and marine (water quality, ecosystems). Important aspects of this research were the focus on the interrelations between the variables, and the complexity of the system.

As mentioned previously, the tourism system can be considered an information system. Tourism is driven by information and the key organising link between the parts is the provision of information (Beeton et al., 1997). Based on this concept, a model of the tourism system can be developed (Figure 2.5). This model illustrates the main subsystems of the tourism system, located geographically in either the ‘tourism origin system’ or the ‘tourism destination system’, and the way that information links each of the subsystems (Beeton et al., 1997).

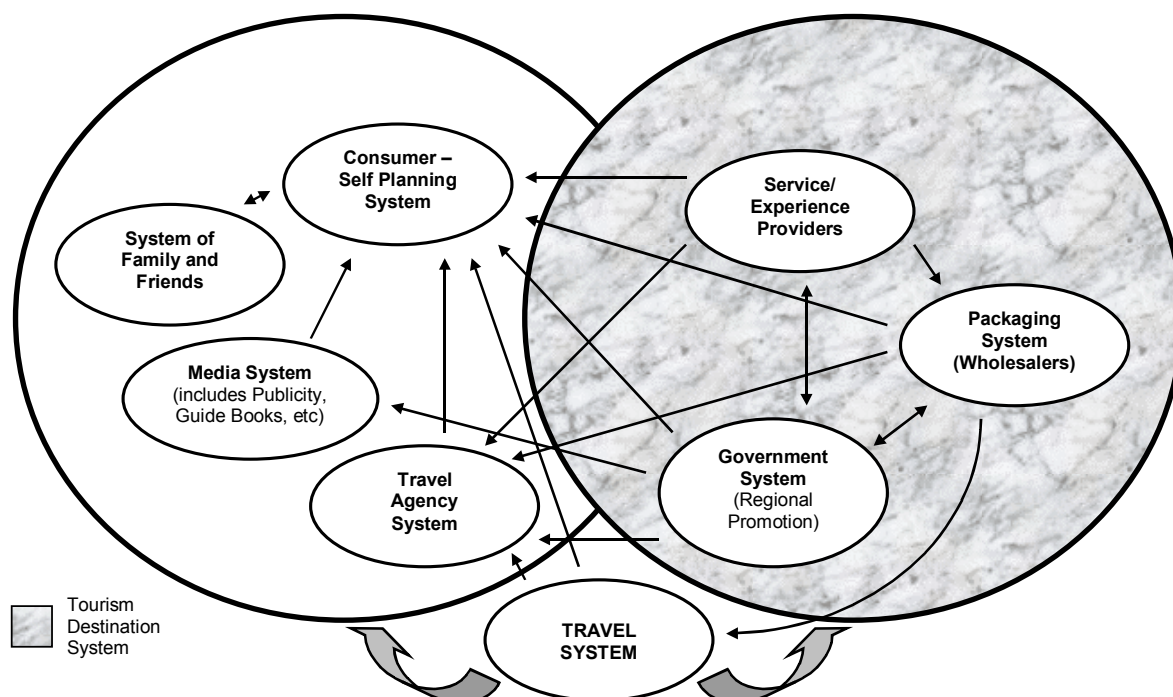


Figure 2.5 Tourism as an Information System. This illustrates how the Tourism Destination System fits into the wider system. Based on the concepts presented by Beeton, Horneman and Hardy (1997).

2.3.2.4 Overview of Tourism as a System

Despite the multiple perspectives applied in describing the ‘tourism system’, it can be agreed that tourism is an open system, as elements within tourism are affected by environmental factors. These external influences include human, socio-cultural, economic, political, legal, technological and physical aspects (Leiper, 1990). The tourism system is therefore functioning within other systems, which effect its activities, and/or are affected by its presence (Liu, 1994b). Directly involved businesses may be entirely or partially within the tourism system, while external influences are from related businesses or environments,

both social and biophysical (Lundberg, 1990). Parts of the tourism system always overlap with other activities, such as travel, recreation, and leisure and yet do not encompass all their activities (Mill & Morrison, 1985, 1998). Additionally each of these activities are inherent components of the whole industrial social system (Krippendorf, 1986). It should also be recognised that the components within the internal tourism system environment establish “the capability and capacity of the tourism system in adapting to its external environment and maximising the benefits and minimising the costs arising from external changes” (Liu, 1994b p.21).

Tourism systems are dynamic. During the life of a system, its function may alter or change completely (Katz & Kahn, 1978). Change within a tourism destination is often focused on the development of the destination itself, as well as components, such as new experiences and facilities. In fact this review has shown that the recognition of the complexity of tourism has increased markedly since the limited view of the 1940s.

An important concept underlying system thinking is that a field or phenomenon is not a single system but can be a hierarchy of systems (Katz & Kahn, 1978). As a result the tourism system and its subsystems can be identified and studied (Beeton et al., 1997). Of the multiple subsystems within the tourism system the focus of this study is the system operating within a tourism destination (as illustrated by the shaded section of Figure 2.5).

The tourism destination itself is comprised of numerous parts including attractions, facilities, infrastructure, transportation, and hospitality. Each part is dependant upon the others for attracting, servicing, and satisfying the tourists (Mill & Morrison, 1985). The destination is the result of the combined activities of all its component parts. Successful destination development therefore necessitates all these parts to operate in harmony, providing a value added integrated system (Liu, 1994b; Machiavelli, 2001).

This dissertation is in many ways a quest for candidate theories to explain tourism change. The above discussion reveals that tourism is not only a complex system but a complex of systems. Consequently summative theories will only report easily measured macro change. The components of tourism change can demonstrate a range of patterns of growth or contraction that may be masked by the overall model.

The following sections review the range of candidate theories that are available for explaining how tourism changes over time and explores their applicability. Following the description and evaluation of these process of change theories, a composite model will be constructed that allows the various subsystems of tourism to be explored and their summative effects discussed. The implicit assumption that is emerging from this dissertation is that for tourism to be effectively studied both its subsystems, and the manifestation of these subsystems in aggregate, need to be understood in parallel, and the relationships between each of the subsystems explored. This is a theme that will be returned to in the concluding chapters of this dissertation.

2.4 Classical Change Theory - The Life-Cycle Model

Life-cycle theory, despite being originally based on a biological analogy, has been widely applied in other contexts. The notion of the fixed life-cycle of higher living organisms, embracing the predetermined stages of birth, growth, maturity, and decline is a compelling one (Tellis & Crawford, 1981; Wollin, 1995). The stages of the life-cycle are illustrated through the use of the ‘S-shaped’ logistic curve (Figure 2.6). This classical curve was initially developed to describe human population growth by Pearl (1924) and has since been applied to a variety of growth situations.

An important concept within life-cycle theory is the premise of a process or journey from the starting point of birth to the termination point of death (Levinson et al., 1978). This theory supports the concepts of growth, development, change, and evolution, as part of the life-cycle process.

In a review of the human life-cycle, Levinson and others (1978) incorporated both the overall pattern and the endless variation within it. The basic pattern is shaped by many and various influences. The pattern may be changed or the process sped up, slowed down, or even stopped. However, the underlying sequence is followed for as long as the process continues (Levinson et al., 1978).

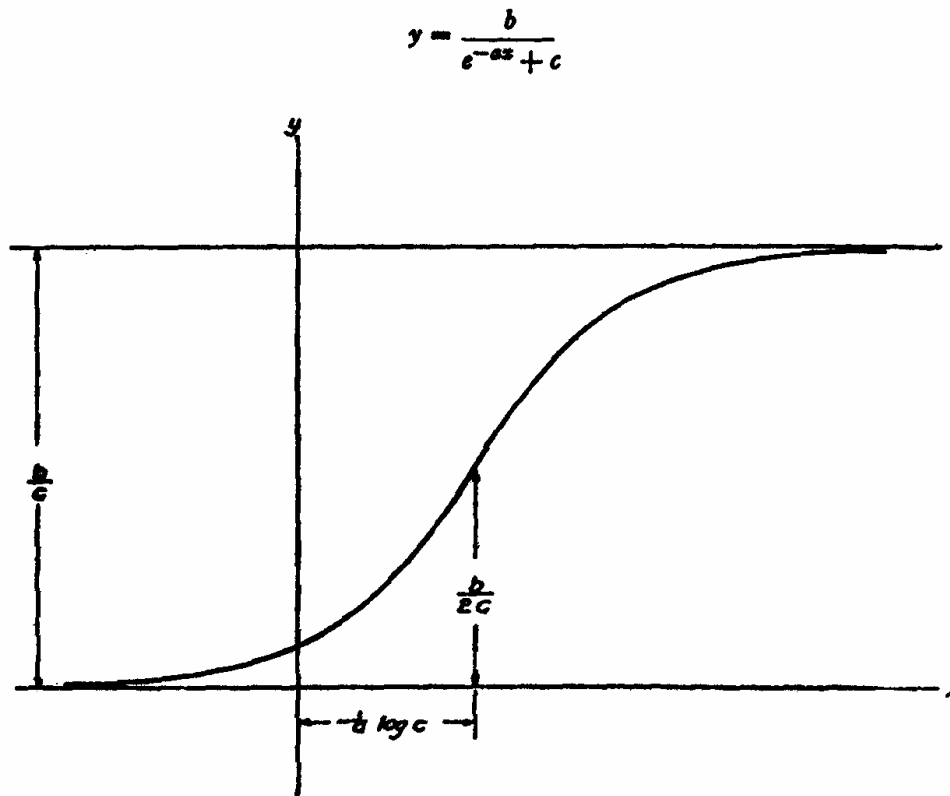


Figure 2.6 The Growth Curve.
The 'S-shaped' growth curve (Pearl, 1924) which is often used to illustrate the life-cycle theory, encompassing the stages of birth, growth, and maturity.

Another concept of life-cycle theory is the incorporation of stages, or periods, during the life-cycle. Each stage is different, although there are commonalities across the stages. Each stage is considered relatively stable, compared to the total life-cycle. However the stages are not static, with change still occurring within each. Change is also necessary for the transition from one stage to the next, as each period builds on the preceding stage(s), creating the life-cycle (Levinson et al., 1978).

2.4.1 The Product Life-Cycle

A significant application of life-cycle theory occurred within the marketing arena. The theory was applied to the 'product' component within the business sector during the early 1950s (Rink & Swan, 1979) and by the mid 1960s was a concept known by many, but rarely used, strategically or tactically (Levitt, 1965). The concept of a 'Product Life-Cycle' characterises the stages that a product progresses through, commencing with its introduction into the marketplace and finishing with its departure from the market (Lusch & Lusch,

1987). The extent of its application is illustrated by the inclusion of the life-cycle theory in nearly all marketing texts from the late 1970s (Onkvisit & Shaw, 1986). Over time the theory has been applied within the business world as a framework for product management, strategic planning, cost and financial aspects, retailing, purchasing, international trade, manufacturing, and forecasting (Tellis & Crawford, 1981). However it has since been determined that the product life-cycle model is one of many tools available for planning, and that managers should be aware that the S-shaped pattern is not inevitable (Lumsdon, 1997).

2.4.1.1 The Stages of the Product Life-Cycle

The basis of the product life-cycle is that a successful product progresses through a series of predetermined sequential stages (Figure 2.7). These stages are defined by the rate of growth in the sales of the product. The inflection points in the sales curve indicate the change from one stage to the next (Porter, 1980). Each stage of the life-cycle is considered to have particular opportunities, as well as challenges for management (Richardson, 1986).

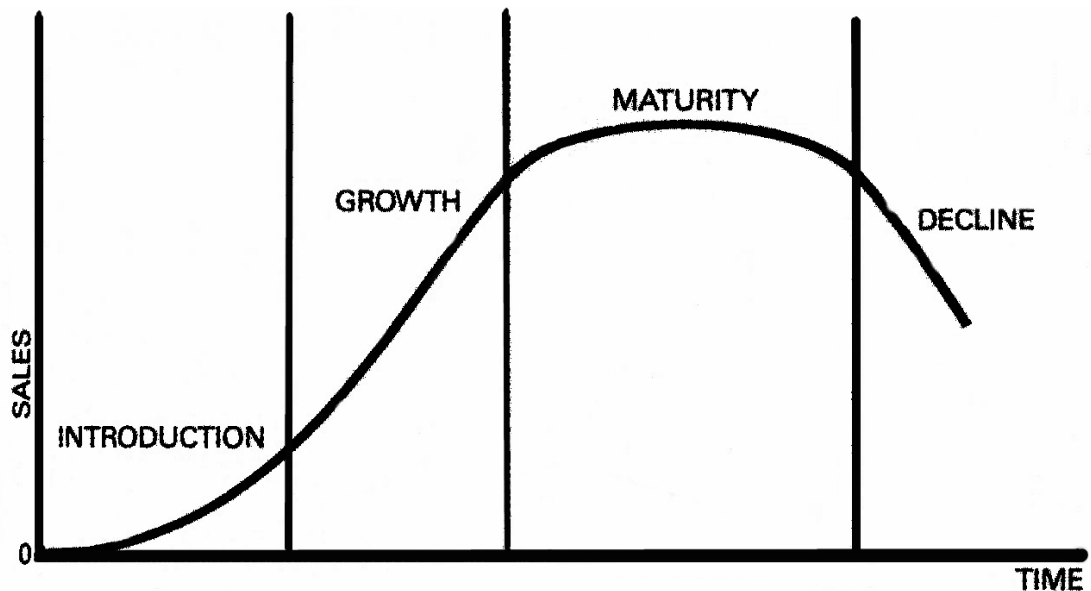


Figure 2.7 The Product Life-Cycle. The stages of the product life-cycle, as determined by the level of sales achieved (Lusch & Lusch, 1987).

The stages of the product life-cycle are:

1. Introduction - the company is aiming to create awareness within the market of the new product, to stimulate trial, although a loss is often the expected economic outcome of this stage.
2. Growth - sales increase rapidly as the product reaches the masses, and satisfied customers repurchase and spread the word, while the company conducts mass advertising, recoups the initial costs, and generates significant profits, although competitors appear and attempt to steal market share and profits.
3. Maturity - during this, the longest stage of the product life-cycle, sales increase to a steady level where they remain, although profits are reduced due to the high costs of marketing and the significant number of competitors, who each attempt to differentiate their product or their promotional offers.
4. Decline - the stage of a product's life where demand, sales, number of competitors all decrease, often rapidly (Kurtz & Boone, 1984).

A primary criticism of the product life-cycle is the variation that occurs in the growth patterns of products. One such variation is the inclusion of multiple periods of growth and decline, which can follow the initial decline stage (Porter, 1980). This led to the definition of a fifth life-cycle stage: 'Death' or 'Revitalisation'. A company can choose to let the product die, or significantly modify the offering and/or promotion in an attempt to boost sales.

Applying life-cycle theory to products focuses on the level of sales and the pattern generated by these sales over time. The sales define the various stages of the product's life-cycle. The initial application of life-cycle theory to products led to a secondary focus on the stages themselves, with researchers examining aspects related to the product, in addition to sales, that change during the product's life.

Porter (1980 pp.159-61), presented the common predictions made by various researchers about the stages of the product life-cycle, in the categories of products, buyers, marketing, manufacturing and distribution, research and development, competition, risk, margins and profit, foreign trade, and the overall strategy appropriate for each stage of the product life-cycle. Even when these predictions are summarised, the main characteristics of each of the life-cycle stages highlight the range of changes that can occur over a product's life. These

predictions contributed significantly to the understanding of the process, and the recognition that change influences other aspects.

2.4.1.2 Limitations of the Product Life-Cycle Theory

This simple but popular product life-cycle model is not universally accepted. One of the major concerns is the theory's oversimplification of the growth process of a product (Wind & Claycamp, 1976). Although the model has been used extensively there are significant concerns, which have been categorised into applicability, modelling, validity, and aggregation (Tellis & Crawford, 1981). These limitations are particularly relevant for this study as they affect the application of the theory to tourism destination change.

The first limitation of the product life-cycle model is its lack of applicability. The model can be considered an idealisation that does not describe the development pattern of all products (Lusch & Lusch, 1987). There are many examples that simply do not follow the pattern (Dhalla & Yuspeh, 1976). Sales growth does not always pass through each stage of the life-cycle, with some skipping the slow introductory phase, while others pass directly from growth to decline, bypassing maturity (Porter, 1980). The product life-cycle curve is only one option frequently selected from a set of patterns (Midgley, 1981). Rink and Swan (1979) have indicated that although the classical product life-cycle curve is the most common, at least nine other product life-cycle patterns exist (Figure 2.8).

Within the product life-cycle theory there is no concept that assists in predicting whether the model will or will not be applicable for a specific product (Porter, 1980). The product life-cycle stages have provided the basis for common commercial practice in developing marketing strategies. However these recommendations lack applicability as they "have usually been vague, nonoperational, not empirically supported, and conceptually questionable" (Wind & Claycamp, 1976 p.2). Even when products do follow the product life-cycle stages there is significant variation in the duration of each stage (Porter, 1980; Kurtz & Boone, 1984). As a result, it is not always possible to determine the current life-cycle stage of a product (Porter, 1980).

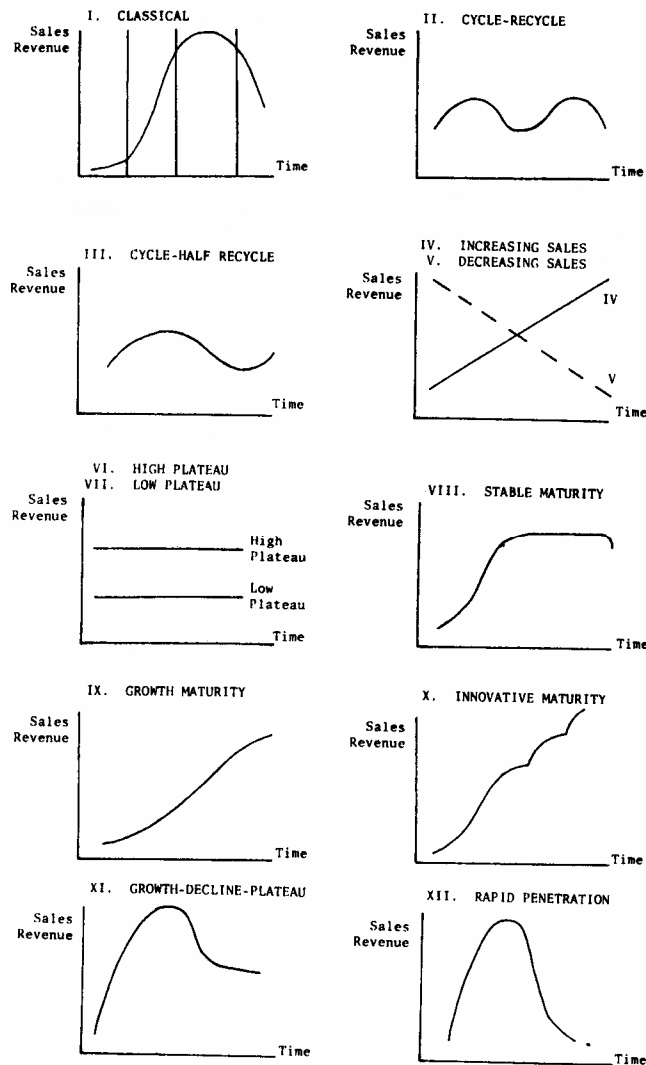


Figure 2.8 Product Life-Cycle Patterns. The various product life-cycle patterns (Rink & Swan, 1979) illustrate that although the classical S-shaped growth pattern is common, there are a range of alternate patterns generated by the volume of sales of a product over time.

The problem of applicability of the product life-cycle theory relates to the second limitation: its use as a modelling tool. This process of change theory can be considered a useful descriptive technique, rather than a predictive tool (Day, 1981). The lack of applicability and the inherent variation restrict the use of the product life-cycle as a planning tool (Porter, 1980). In reality, the product life-cycle should be considered a ‘dependant’ variable that is determined by marketing and other activities, rather than an ‘independent’ variable that management must adjust their marketing to suit (Dhalla & Yuspeh, 1976). The theory has even been considered a tautology, as sales are used to define the stages, which are then used

to predict sales (Hunt, 1976). The concept can also be self-filling as the cycle is dependant on the marketing activities, which are in turn based on the 'known' life-cycle stage (Dhalla & Yuspeh, 1976). Wollin (1995) contends that the stages are considered predetermined, resulting in a fatalistic view of those applying the concept that it is only a matter of time before decline will occur. As forecasting does not occur until the product is in the cycle, this model is not a tool for predicting when, or where, the cycle may commence (Day, 1981). Application of the life-cycle theory as a forecasting tool requires understanding and prediction of the forces driving it (Onkvisit & Shaw, 1986), such as the impact of strategic intervention.

The third limitation is the validity of the product life-cycle. It does not fulfil the needs of those describing an open system as it fails to consider independent variables. For example the product model considers only one set of customer characteristics (Wind, 1981). This is based on the assumption that the potential users are homogenous. Additionally this theory does not incorporate the level and type of competition, marketing effort, product innovation, and other environmental factors over which management has some control (Wind & Claycamp, 1976; Porter, 1980; Midgley, 1981; Tellis & Crawford, 1981). Furthermore the product life-cycle theory does not consider the impact from external systems, such as changes to complimentary products, government regulations and policies, demographic patterns, and social, economic, and cultural trends (Rink & Swan, 1979; Day, 1981). Instead of considering independent variables the product life-cycle theory is dependent on the progression of stages, assuming that sales are basically a function of time (Tellis & Crawford, 1981).

The fourth limitation is that the life-cycle theory does not apply to a defined level of aggregation. In its application to 'products', life-cycle theory can be used for product class, e.g. television; form, e.g. plasma screen television; or brand, e.g. Panasonic. For each level there are many examples which do not follow the life-cycle pattern, particularly product classes and product brands (Dhalla & Yuspeh, 1976), with the product form appearing to have the closest approximation to the life-cycle model (Tellis & Crawford, 1981). At higher levels of aggregation it becomes difficult to determine the transition point from one stage to the next (Abell & Hammond, 1979). The general application of this theory subsequently extended from products to descriptions of technologies, organisations, industries, and

industry inter-relationships (Wollin, 1995). This application of a product model to complex systems highlights the limitations of the model.

An additional limitation associated with the product life-cycle is that it is self-limiting. Firstly, the theory assumes that growth is inevitable (Wollin, 1995). Secondly, product growth is considered limited as the product is expected to die, or at least require multiple rejuvenations to prolong life (Tellis & Crawford, 1981). Thirdly, it is perceived that, as occurs in the life-cycles of higher living organisms, “the developing entity contains within it an underlying logic, program, or code that regulates the process of change and moves it from a given point of departure towards a subsequent end which is prefigured in the present state” (Van de Ven, 1992 p.177). Finally, one of the features of this process of change theory is that there exists a constraint on long term growth due to a level of saturation (Wind, 1981).

2.4.1.3 The Current Role of the Product Life-Cycle Theory

As marketing is a context-driven discipline, accepted generalisations need to be periodically reviewed (Sheth & Sisodia, 1999). The life-cycle theory lead to a change in focus from the individual products to product replacement cycles, as consumers often replace items with a next-generation product before the physical life of the earlier generation is over (Norton & Bass, 1992). The development of this concept is in line with the change from a diffusion process approach to a diffusion and substitution theory.

Marketing is not the only dynamic context-driven discipline. Industrial age economics has been supplemented by new growth economic theory, which highlights the importance of knowledge assets, new ideas and processes, increasing returns, and the effects of market forces (Sheth & Sisodia, 1999). These changes in the business arena reduce the applicability of the product life-cycle as its implication of slow evolutionary change is no longer appropriate (Sheth & Sisodia, 1999).

Despite this, recent marketing texts still focus on the product life-cycle (for example Dann & Dann, 2004; Rix, 2004). Although it is now clarified that the theory is a ‘teaching tool’, representing a ‘typical’ product, which therefore may differ from real-world product examples (Dann & Dann, 2004). However, the main use of the theory is still to determine

which marketing strategies are most appropriate, depending on which stage a product is considered to be in (Dann & Dann, 2004; Rix, 2004).

Considering the limitation of applicability, Rix (2004) specifies that the product life-cycle is only applicable to a generic category of product, rather than a specific brand. The life-cycle pattern is considered to represent the aggregate demand for all brands in the product category. A specific brand within the category holds a percentage share of the aggregate sales.

In addition, it is recognised that product life-cycles are getting shorter, as a result of technological changes (Rix, 2004), effective global distribution, and the increasing speed of the product development process (Dann & Dann, 2004). The stages are also expected to differ in length across different products, with some products not passing through all the stages (Rix, 2004). Therefore the pattern of sales generated by different types of products is expected to differ (Dann & Dann, 2004). In addition it is also accepted that management strategies can 'control' the shape of the life-cycle pattern (Rix, 2004).

2.4.1.4 Summary of the Product Life-Cycle Theory

In conclusion, the product life-cycle theory is a theoretical model. It is useful as a descriptive model for the historical analysis of a product. As early as 1976 it was recognised by Hunt (1976) that as an explanatory theory it is deficient in explaining the current position or future directions. It is also inadequate for explaining the phenomenon of product growth and proliferation (Tellis & Crawford, 1981).

A main reason for the inadequacy of the product life-cycle is due to the significant differences between biological and other systems (Dhalla & Yuspeh, 1976). The predictable biological growth curves are not necessarily applicable to social phenomenon where the boundaries are not necessarily limited (Katz & Kahn, 1978). However, the product life-cycle can be considered as the representation of the culmination of internal and external forces of change acting on a system (Day, 1981). As a result, the model is often suitable for understanding past change at a macro level.

2.4.2 Application of the Life-Cycle Model to Tourism

Given that the life-cycle concept was one of the most commonly utilised product change theories in the 1970s, it is understandable that this model was applied to change within the tourism arena.

The product life-cycle has been applied at the destination level as well as to individual tourism companies and products. Consequently the growth pattern of a destination is the aggregation of the growth patterns of all the companies and products at the destination. This usage indicates a range in the level of applicability of the model.

The application of the product life-cycle to individual tourism products was part of the wider use of marketing in the business sector of the travel and tourism industry. As already mentioned, marketing requires consideration of the stage in the product life-cycle, in order to apply the appropriate strategies to position the product effectively in the marketplace (Kurtz & Boone, 1984; Mill & Morrison, 1985; Assael, 1987; Lusch & Lusch, 1987; Dann & McMoll-Kennedy, 1992; Kotler et al., 1999). This use of the product life-cycle generated strategies for marketing travel and tourism products, dependant on the stage of life of the particular product.

Application of the life-cycle model at the macro destination level has provided the basis for various tourism development models, most commonly Butler's (1980) Tourist Area Cycle of Evolution model (Figure 2.9). This life-cycle approach was informed by Stanfield's (1978) Resort Cycle analysis of Atlantic City.

This Destination, or Tourism Area, Life-Cycle has six stages that were initially defined by their characteristics:

1. **Exploration** – few adventurous tourists; individually planned itineraries; irregular visitation patterns; interest in nature/culture; close interaction with local people; minimal effect on social, cultural and physical environments; use of local facilities.

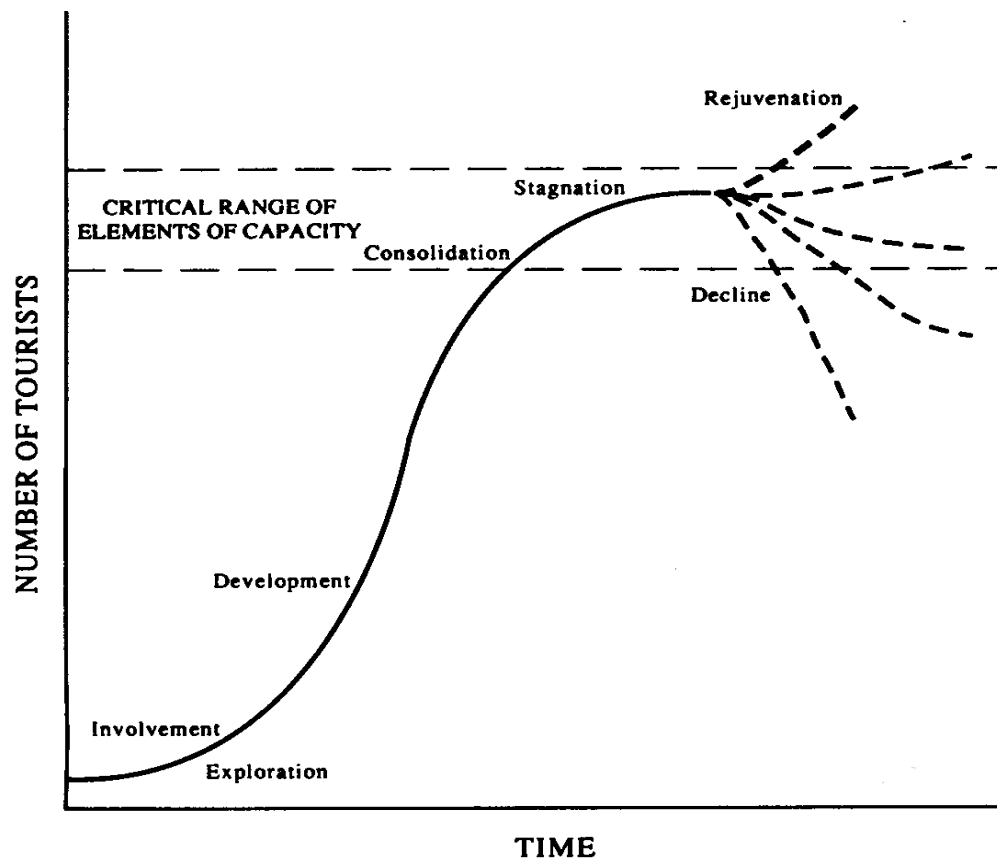


Figure 2.9 The Destination Life-Cycle.
The application of the product life-cycle to tourism destinations generated the six-staged Tourist Area Cycle Of Evolution (Butler, 1980).

2. **Involvement** – increased tourist numbers; start of the provision of tourist facilities; some advertising; start of tourist market and season; interaction stays high; some changes in social life of locals; pressure on public sector to provide infrastructure.
3. **Development** – tourists’ numbers rapidly increase to equal or exceed local population; clear and different tourist market; extensive advertising and links to the generating region(s); loss of local control through increased foreign-owned facilities, and regional/national planning and provision of infrastructure; promotion of artificial attractions; use of migrant labour.

4. **Consolidation** – growth rate declines; tourism now a major economic sector; heavy advertising aiming to extend tourist season and market(s); some opposition to tourism; clear recreational business districts; old facilities have deteriorated.

 5. **Stagnation** – tourist capacity reached/exceeded; reliance on repeat visitation and conventions; surplus hotel capacity and changes in ownership; focus on the package tourist; new developments peripheral to the existing destination; established, but out-of-fashion image; social, environmental and economic problems.

 6. **Decline and Demise** – tourist market is lost; vacationers decline; reliance on week-enders and day visitors; high property turnover and conversion of many facilities; increased local involvement.
-or **Rejuvenation** – complete changed in the attractions and image; combined public and private sector efforts; a new tourist market is found, often a special interest group.

Butler's (1980) Tourist Area Cycle of Evolution model follows the same S-shaped growth curve used in the classic product life-cycle model. However, Butler's application of this theory to tourism destinations generated two transitional stages (Butler, 1980). The initial 'exploration' (birth) stage is considered to progress through a period of 'involvement' prior to the 'development' (growth) stage. The second transition stage of 'consolidation' occurs between the 'development' (growth) period and 'stagnation' (maturity). Both the life-cycle models then progress to decline which can eventuate in death, or be reversed by rejuvenation. Although the rate of change differs between destinations, each destination is expected to eventually progress through all the stages (Butler, 1980).

2.4.2.1 Predicting Changing during the Destination Life-Cycle

An important contribution of the product life-cycle theory was the predictions about the types of change that occur at the different stages of a product's life. These predictions, which developed alongside the product life-cycle, have also been applied to tourism destinations, initially by Butler (1980).

In summary, over the life of a destination there is change from “authenticity to artificial, from indigenous to imported, from low density to high density, from low energy consumption to high energy consumption, from locally controlled to externally controlled, and from sustainable or renewable to unsustainable and nonrenewable” (Butler, 1993 p.32).

The destination predictions for change over the life-cycle link with the earlier tourist typologies proposed by Cohen (1972) and Plog (1974), and Doxey’s (1976) tourist irritation index.

The numerous predictions for each stage of the destination life-cycle, have been summarised by Buhalis (2000) into the categories of destination characteristics, marketing response, economic impacts, social impacts, and environmental impacts (Figure 2.10).

2.4.2.2 Application of the Life-Cycle Theory to Tourism Destinations

Substantial application of the life-cycle framework, conducted for specific tourist locations, indicate the general validity of the model in providing a structure to retrospectively describe past tourism destination development (Table 2.2) (Hovinen, 1981, 1982; Oglethorpe, 1984; Meyer-Arendt, 1985; Keys, 1986; Keller, 1987; Wilkinson, 1987; Strapp, 1988; Weaver, 1988; Cooper & Jackson, 1989; Barr, 1990a; Cooper, 1990; Debbage, 1990; Weaver, 1990; Foster & Murphy, 1991; France, 1991; Morgan, 1991; Choy, 1992; Getz, 1992; Ioannides, 1992; Kermath & Thomas, 1992; Shaw & Williams, 1992; di Benedetto & Bojanic, 1993; Johnson & Snepenger, 1993; Messerli, 1993; Williams, 1993; Agarwal, 1994; Douglas, 1994; Harrison, 1995; Russell, 1995; Formica & Uysal, 1996; Agarwal, 1997; Cooper, 1997; Digance, 1997; Douglas, 1997; Goncalves & Aguas, 1997; Prosser, 1997; Tooman, 1997; Baum, 1998; Priestley & Mundet, 1998; Russell & Faulkner, 1998; Twining-Ward & Baum, 1998; Knowles & Curtis, 1999; Johnston, 2001; Lundtorp & Wanhill, 2001; Toh et al., 2001; Hovinen, 2002).

It is important to note that this analysis focuses on the application of Butler’s (1980) life-cycle model and therefore does not incorporate all studies conducted on the development of tourism destinations.

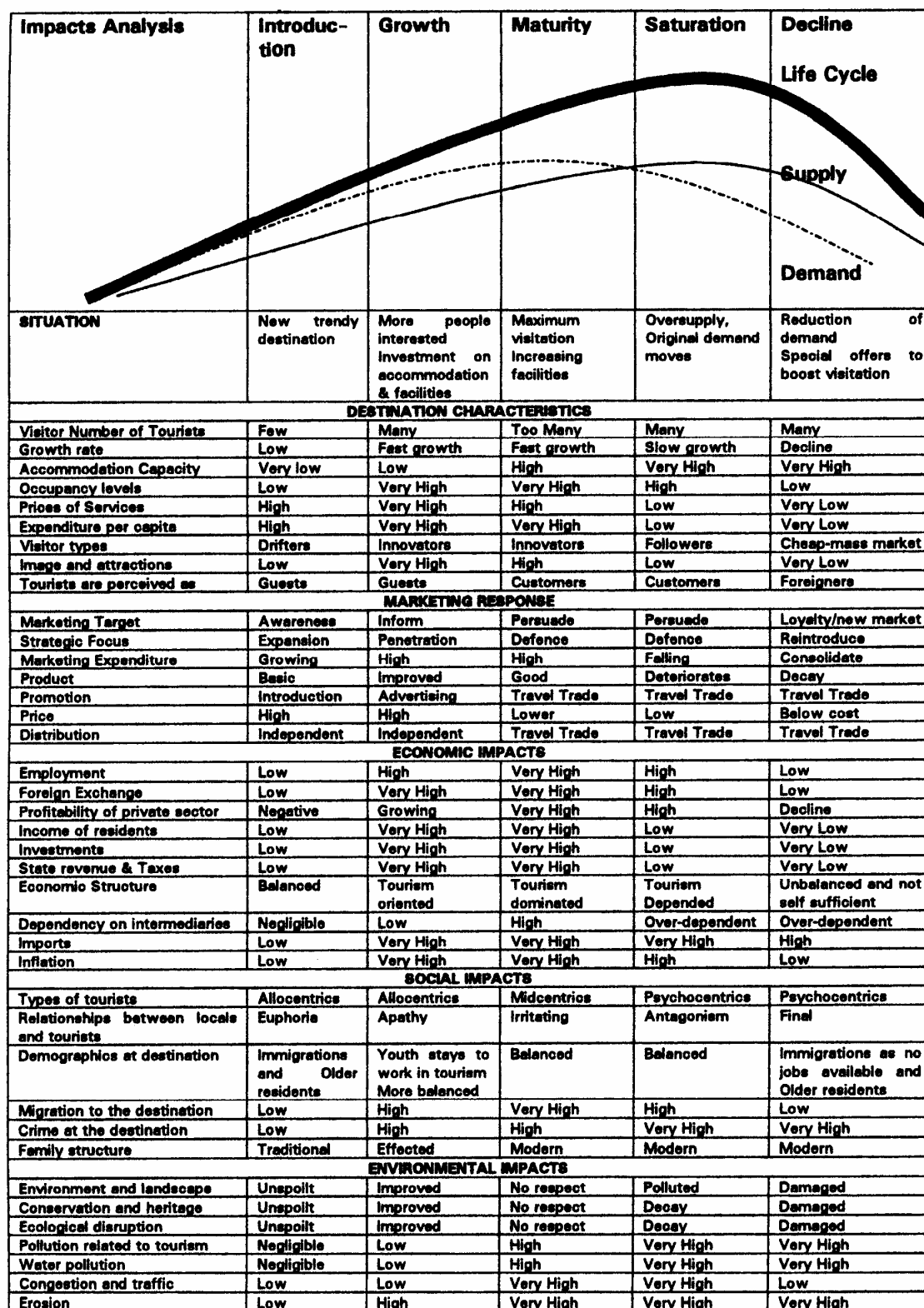


Figure 2.10 Destination Life-Cycle Stage Predictions. Summary of the predictions for each stages of the destination life-cycle, regarding the characteristics of the destination, marketing strategies, and economic, social, and environmental impacts (Buhalis, 2000).

Table 2.2 Destination Life-Cycle Research.
Research applying the life-cycle model to tourism destination development. This summary includes the type of data parameters used to graph the growth in tourism over time, and highlights the limited number of studies that used such variables and the common use of a single variable, often visitor arrivals/numbers or nights.

Author(s)	Year	Destination	Parameter in Table/Figure	Parameter Graphed Over Time
Hovinen	1981 1982	Lancaster County, Pennsylvania	–	–
Oglethorpe	1984	Malta	Tourist arrivals British tourist arrivals Hotel number/beds/ownership	Tourist Arrivals Arrivals by main origins Tourist expenditure
Meyer-Arendt	1985	Grand Isle, Louisiana	Schematicized settlement evolution	Resident population
Keys	1986	Queensland regions	Population, accommodation capacity & occupancy, tourism employment, building approvals	–
Keller	1987	Canada's Northwest Territories	Estimate of visitors and expenditure within the region, Location of package tour companies	–
Wilkinson	1987	Small island nations (Caribbean)	Caribbean tourist arrivals Island arrivals Island visitor expenditure 1982 Estimated visitor expenditure	–
Strapp	1988	Sauble Beach, Canada	–	Estimated visitor numbers Estimated 'person-days'
Weaver	1988	Antigua	–	Tourist numbers Tourism share of GNP
Cooper & Jackson, and Cooper	1989 1990	Isle of Man, UK	Visitor Profile 1986 – Percentage by origin, age, social grade, and repeat visitation	Passenger arrivals Population Passenger arrivals by air/sea
Barr	1990	Whitsundays, Qld, Australia	–	–
Debbage	1990	Bahamas	1985 & 1987 – Largest 10 US Airlines by Market Share, 1989 – World's Largest Hotel Chains by number of hotels and number of rooms	–
Weaver	1990	Cayman Islands	Tourist and day-tripper arrivals	Total visitor arrivals
Foster & Murphy	1991	Parksville & Qualicum Beach, Canada	Accommodation providers Number of units Population by age group	–
France	1991	Caribbean (Barbados)	Hotel rooms by region Hotel establishment by region Tour accommodation types Hotel ownership	Visitors to Barbados
Morgan	1991	Majorca, Spain	UK visitors to Spain	–
Choy	1992	13 Pacific Island Destinations	–	Visitor arrivals
Getz	1992	Niagara Falls	Bridge crossings by bridge Accommodation rooms Occupancy rates Site attendance Results of industry survey	–
Ioannides	1992	Cyprus	Bed Capacity by district Tour arrivals by type	Visitor arrivals by origin Bed capacity by district

Author(s)	Year	Destination	Parameter in Table/Figure	Parameter Graphed Over Time
Kermath & Thomas	1992	Sosua, Dominican Republic	–	Number of tourist establishments
Shaw & Williams	1992	Cornwall & Devon	Map: tourism restriction areas Visitor perceptions 1990	–
di Benedetto & Bojanic	1993	Florida Cypress Gardens	–	Number of visitors
Johnson & Snepenger	1993	Greater Yellowstone Region	Visitor attitudes Profile of businesses Tourist expenditures Perceived impacts	Number of visitors Tourism income by service Visitor nights by region
Messerli	1993	Santa Fe, New Mexico	Average occupancy and room rates	Number of hotel rooms Annual hotel occupancy Annual average room rate
Williams	1993	Minorca, Spain	–	Visitor numbers by origin Employment structure Hotel rooms
Agarwal	1994	South England seaside resorts	–	–
Douglas	1994	Papua New Guinea, Solomon Islands, Vanuatu (Melanesia)	Expected and actual arrivals Number of, and rooms in hotels, resorts, and guesthouses 1990 – arrival sources, occupancy, earnings, employment, and growth	Visitor arrivals by air Cruise passengers
Harrison	1995	Swaziland, Botswana & Lesotho Southern Africa	Total visitors by purpose Origin of hotel guests International tourist arrivals Percent of total intl arrivals	–
Russell and Russell & Faulkner	1995 1998	Coolangatta	–	Visitor numbers
Formica & Uysal	1996	Italy	International visitors and visitor nights	–
Agarwal	1997	Torbay, UK	–	–
Cooper	1997	British seaside resorts	Hotel room and bed occupancy rates by sector	Total visitor nights in seaside destinations Market share of seaside nights
Digance	1997	Thredbo River Valley, NSW, Australia	–	–
Douglas	1997	Melanesia: Papua New Guinea, Solomon Islands, Vanuatu	1993: population, land area, visitor/holiday arrivals, number of rooms, occupancy, tourism earnings, foreign exchange, tourism employment	–
Goncalves & Aguas	1997	Algarve, Portugal	Visitor nights by accommodation type	Visitor nights by accommodation type
Prosser	1997	Gold Coast & Coffs Harbour	Population & pop change, employment in service sector, unemployment	Bed numbers in hotels/motels, flats/units and caravan nights
Tooman	1997	Smoky Mountains, US	Quantitative social welfare indicators	–
Baum	1998	7 'cold-water' islands	Arrivals to the Isle of Man, Aland Islands, Iceland, and Newfoundland	Tourism arrivals to Prince Edward Island

Author(s)	Year	Destination	Parameter in Table/Figure	Parameter Graphed Over Time
Priestley & Mundet	1998	Catalan Coast, Spain	–	Hotel capacity Population
Twining-Ward & Baum	1998	Baltic Islands	–	–
Knowles & Curtis	1999	European mass tourist resorts	–	–
Johnston	2001	Kona, Hawaii Island	Map: tourist landscape	Number of rooms
Lundtorp & Wanhill	2001	Bornholm (Danish island)	–	Number of ferry passengers 1910-2000
Toh, Khan & Koh	2001	Singapore	Visitor arrivals by purpose Travel balance: exports/imports	Visitor arrivals by purpose Travel balance: exports/imports
Hovinen	2002	Lancaster County, Pennsylvania	Change in sales by tourist sectors	–

A major problem with the application of the destination life-cycle model has been the limited availability of relevant data. To generate a pattern of growth for a destination requires the availability of a consistent collection of data over time for a variable that can be used as an indicator of growth. The destination life-cycle model utilises visitor numbers as the variable to be plotted over time to generate the pattern of growth. However consistent time-series data on visitation is not always available.

Researchers investigating tourism destination development through the application of the life-cycle model have tried to address this data issue in a number of ways, including the study of a clear geographically defined destination, such as an island or attraction; the use of an alternate growth indicator, such as the number of beds or the local population; the presentation of available data in a table or discussion, such as arrivals for isolated years; the estimation of data, such as for arrivals; or simply the written account of the destination, separating its development into the stages of the life-cycle. These approaches can be seen in the review of over 40 tourism destination life-cycle studies (Section 2.4.2.2).

Many of the selected destinations to be studied have been islands, as they often have records of the number of arrivals (Cooper, 1992; Goncalves & Aguas, 1997). Twelve of the studies incorporated visitor arrivals to island destinations, in either a graph or table format, including Malta (Oglethorpe, 1984), small island nations in the Caribbean (Wilkinson, 1987), the Caribbean island of Antigua (Weaver, 1988), the Isle of Man, UK (Cooper & Jackson, 1989; Cooper, 1990), the Cayman Islands (Weaver, 1990), Barbados (France, 1991), thirteen Pacific Islands (Choy, 1992), Cyprus (Ioannides, 1992), the Spanish island of

Minorca (Williams, 1993), the Melanesian islands of Papua New Guinea, Solomon Islands and Vanuatu (Douglas, 1994), seven cold-water islands (Baum, 1998), the Danish island of Bornholm (Lundtorp & Wanhill, 2001), and Singapore (Toh et al., 2001).

Four other island studies were not able to utilise arrival data and instead used alternate data variables, such as the resident population of Grand Isle, Louisiana (Meyer-Arendt, 1985), the number of beds available on Vancouver Island (Foster & Murphy, 1991), the number of UK visitors to Spain (Morgan, 1991), and the number of accommodation rooms available at Kona on Hawaii Island (Johnston, 2001).

A further three island studies have not reported any time-series data, in a graph or table, to support the application of the destination life-cycle model. However figures may have been incorporated into the discussion. These include the studies of the Whitsundays (Barr, 1990a), the Bahamas (Debbage, 1990), and the three Baltic islands of Bornholm, Gotland, and Aland (Twining-Ward & Baum, 1998). In addition, Douglas's article (1997) on the application of the life-cycle model to Melanesian islands did not provide any time-series data, despite being based on his doctoral thesis (1994), mentioned above.

There have also been a number of applications of the destination life-cycle model to non-island destinations. Where possible, these studies have used time-series data to determine the pattern of growth of the destination. These have included the number of tourist related establishments in Sousa, Dominican Republic (Kermath & Thomas, 1992); visitor numbers, visitor nights by region, and tourism income by service, for the Greater Yellowstone Region (Johnson & Snepenger, 1993); Number of hotel rooms, average occupancy, and room rates (Messerli, 1993); visitor numbers for Coolangatta, Australia (Russell, 1995; Russell & Faulkner, 1998); visitor nights and the market share of visitor nights for seaside destinations in Britain (Cooper, 1997); the number of overnight stays in the various forms of accommodation in Algarve, Portugal (Goncalves & Aguas, 1997); available bed nights in three accommodation sectors (Prosser, 1997); and the total capacity of the available hotels, as well as the local population for the Catalan Coast (Priestley & Mundet, 1998). These studies also illustrate the use of more than one variable as an indicator of change to describe the development of the destination. In the case of British seaside resorts, Cooper (1997) combined the graphed data on visitor nights with additional data on occupancy in a table form.

However, the majority of non-island studies have not been able to incorporate data to illustrate the destination's growth pattern, such as for Lancaster County (Hovinen, 1981, 1982, 2002), Parksville and Qualicum Beach, Canada (Foster & Murphy, 1991), Niagara Falls (Getz, 1992), Cornwall and Devon (Shaw & Williams, 1992), the seaside resorts of the south coast of England (Agarwal, 1994), Southern Africa (Harrison, 1995), Torbay, UK (Agarwal, 1997), Thredbo River Valley (Digance, 1997), the Smoky Mountains (Tooman, 1997), and European mass tourist resorts (Knowles & Curtis, 1999).

In three non-island studies data was only provided in a table form, rather than as a graph that illustrated the pattern of growth. An early application of the life-cycle model, conducted by Keys (1986) on regions within Queensland, utilised a comparison of a number of data variables for the different regions as at 1976 and 1981. Harrison (1995), in his study of Swaziland, included time-series data on the number of visitors in hotels, separated into holiday tourists, business and other, from 1972 to 1990. In addition Formica and Uysal (1996) utilised data on international visitors and visitor nights in their study of Italy as a tourist destination.

In most cases however, the pattern of growth has not been provided because of the limited data available. Some tourism related data has been presented in a table/figure, or mentioned in the discussion. One technique was the use of statistics in the discussion of the stages of growth in the destination under investigation. For example, Hovinen (1982) in his description of the stages of tourism growth for Lancaster County in Pennsylvania, included estimates of visitor numbers for various years, the change in the number of motels over a decade, tourism economic impact data for 1978, and visitor survey data for 1980. It is interesting to note that even Hovinen's (2002) recent 'revisiting' of the destination life-cycle as applied to Lancaster Country did not incorporate a graph illustrating the pattern of growth.

Another study applied the life-cycle theory model to a tourist attraction, Florida Cypress Gardens (di Benedetto & Bojanic, 1993). Similar to the island studies, the application of the model to an attraction provides possible access to attendance levels.

There have been only a few studies that have included multiple parameters. Some of these have used the local population as the second variable (Cooper & Jackson, 1989; Priestley &

Mundet, 1998); separated one variable, such as arrivals or overnight stays, into sub-categories (Cooper & Jackson, 1989; Goncalves & Aguas, 1997); or provided two related variables, such as number of accommodation providers and the number of rooms (Foster & Murphy, 1991). It is interesting to note that one of the early studies incorporated data for Malta on visitor arrivals, arrivals by main origin, visitor expenditure, as well as the number of hotel establishments, bed numbers, and the percentage of foreign ownership (Oglethorpe, 1984). One recent study compared the pattern of growth of visitors to Singapore with the travel balance of payments (Toh et al., 2001).

From this review of studies applying the destination life-cycle model to tourism it is clear that the analysis of the growth of destinations has been limited by the availability of relevant time-series tourism data. However the increase in the availability of data on various aspects of a destination provides the opportunity to analyse multiple patterns of growth evident within a destination. Such an analysis of multiple change indicators would provide a more detailed understanding of a destination's development. However it must be noted that during the early stages of development, tourism-related data is rarely collected for a destination.

It can therefore be seen that the destination life-cycle has been used to describe past macro level or overall changes within destinations (Towner & Wall, 1991). However the theory does not consider the micro or lower level changes and their interaction, nor does it identify the catalysts and situations conducive for tourism development, or incorporate the significance of external events and influence. This is partially due to the typical use of a single data variable, such as total visitor numbers, as the indicator of destination growth. This is a good example of "the restrictions imposed by the aggregation process limit the resort cycle paradigm, in a quantitative context, to being no more than a statistical caricature of the real world" (Lundtorp & Wanhill, 2001 p.947). If the tourism system operating at a destination is to be understood multiple variables that accompany change at a destination must be examined. This would also provide the opportunity to study the correlation and interaction between variables.

2.4.2.3 Limitations for Describing the Development of a Tourism Destination System

There has been extensive application of Butler's (1980) tourism life-cycle to numerous destinations over the last quarter century. Also during this period a number of limitations have been noted, by Butler himself, researchers applying the model to a specific destination, and those reviewing the model as a planning tool. The criticisms have been on both conceptual and empirical grounds (Prosser, 1995, 1997; Hovinen, 2002). Some of these criticisms correlate with the product life-cycle limitations already discussed (Section 2.4.1.2), including lack of applicability, limited forecasting use, validity, level of aggregation, and self-limiting.

Even when Butler's (1980) destination life-cycle is considered applicable to empirical research, the model is often remodelled to suit the destination under investigation (see for example Meyer-Arendt, 1985; Strapp, 1988; Getz, 1992; Harrison, 1995; Johnston, 2001). Although the model applies generally, its rendition often varies considerably between destinations. Haywood (1986) proposed four alternate destination life-cycle patterns as examples of the various observed or possible patterns. Scepticism regarding the ability of the model to explain destination growth was reinforced by the 13 different patterns identified by Choy (1992) in his analysis of 13 Pacific Island destinations.

A stage in the destination life-cycle may be divided to suit the explanatory needs of the researcher. Meyer-Arendt (1985) divided the development stage into three separate phases to incorporate the momentous impact from external sources, including natural disasters, wars, and economic depressions.

The stages of the destination life-cycle are also often modified to suit the specific cases and account for its variables. For example, Harrison (1995) replaced the involvement phase with the stages of 'inactivity' and 'transition', and adjusted the development stage to 'truncated development'.

By the mid-1990s the application of the life-cycle model to tourism destinations had "become an important focus for tourism research, with a number of authors proposing refinements of the model to account for the evolution of specific areas" (Prosser, 1995 p.318).

As an alternative to the classical destination life-cycle model, Carter (2000; 2004) presented a Notional Episodic Model of Tourism Growth based on the empirical study of tourism destinations. This model indicates that growth is not always gradual and instead occurs in sporadic steps. The model will be presented and discussed later in this chapter (Section 2.5.3.4). Butler (1993) himself understood that the tourism area life-cycle is not the only description of development, as it is also possible for a tourism destination to commence as one large-scale, externally induced, revolutionary development.

The change in the target market during the destination life-cycle also affects the application of life-cycle theory. As previously mentioned the product life-cycle concept assumes that consumers are homogeneous. If there is a significant change to the level of technology, the function of the product, or the target market, a separate life-cycle is required (Abell, 1980). As a result a destination may be more appropriately described as a number of overlapping life-cycle curves, each illustrating a different target market (Haywood, 1986) (Figure 2.11).

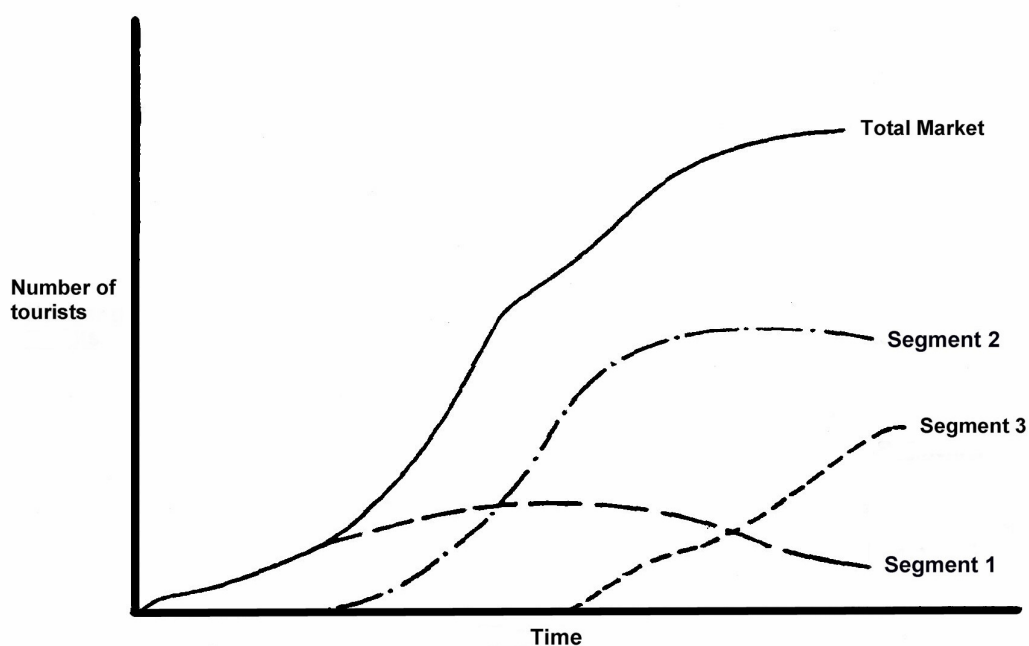


Figure 2.11 Changing Life-Cycles.
The changing life-cycles within the overall destination life-cycle (Haywood, 1986).

The lack of applicability reinforces the notion that the one model is unable to explain tourism development, as discussed by Getz (1992), Bianchi (1994), and Prosser (1995; 1997). There is therefore a lack of empirical evidence to support the model in its unmodified form (Prosser, 1995, 1997).

This concept is reinforced by the fact that the life-cycle model does not apply to a defined level of aggregation (Cooper & Jackson, 1989; Ioannides, 1992). The life-cycle can be applied in various ways depending on the interpretation of the level of aggregation, such as, to a hotel, a region, a country, or a market segment (Cooper et al., 1993; Cooper et al., 1998). The product form appears to have the closest approximation to the life-cycle model (Tellis & Crawford, 1981). Utilising a life-cycle for each form of tourism within a destination would result in the multiple life-cycle curves in which one cycle grows as the previous form declines (Figure 2.11).

The validity of the destination life-cycle is limited as the model does not account for the significant impact that internal and external influences can have on destination development (Ioannides, 1992). In reality, the life-cycle pattern of a destination's growth is dependent on a number of factors, including access, the level and type of competition, marketing activities, government policies, environmental factors, and the rate of development (Cooper, 1989). As the life-cycle theory does not incorporate all these important variables, it is clearly not considering the entire tourism system and its connections.

The concept that a destination will pass through each of the stages of the life-cycle implies that both growth and decline are inevitable. As discussed above, this deterministic approach does not recognise the numerous factors which affect destination change (Cooper et al., 1993; Cooper et al., 1998). "The resort cycle, rather than presenting a rigid and highly predictable life-to-death story (similar to that of a biological specimen), should be dynamic and open-ended, telling an even more exciting story of the origin, growth, and proliferation of resort areas" (Haywood, 1992 p.353).

In addition to limitations relating to the application of the product life-cycle to tourism destinations, the tourism area life-cycle proposed by Butler (1980) also incorporated the principle of carrying capacity (Butler, 1991). Conceptual criticisms have questioned the fixed limit of growth and the difficulty in defining this carrying capacity in practice

(Hovinen, 1981; Wall, 1983; Cooper, 1989; Getz, 1992; Ioannides, 1992; Cooper, 1994; Prosser, 1995, 1997).

In the application of the destination life-cycle the common measure is annual visitor numbers. However the true impact of the level of visitation is also affected by the length of stay, tourist dispersal, the characteristics of the visitors, and the time of year of visitation (Haywood, 1986).

Other limitations of the destination life-cycle include the problems in identifying the stages and the turning points (Cooper, 1989), the failure to recognise the economic market (Bianchi, 1994; Prideaux, 1998, 1999a, 2000), the impact of the entrepreneurial responses as triggers for change (Bianchi, 1994; Hovinen, 2002), and the dangers in its use as the basis for decision making and forecasting (Cooper, 1989; Getz, 1992; Cooper, 1994; Russell & Faulkner, 1998).

2.4.2.4 Relevance of the Life-Cycle Theory to this Study

Life-cycle theory can be applied to developed tourism destinations as a descriptive tool. However, the model cannot be used with any accuracy for predicting the timing, location, or type of initial tourism development, or the growth pattern for a destination, as it is not known when a destination will progress into the next stage of its life. The model is only appropriate for describing *post facto* the macro change within a destination, and therefore does not describe individual change at a micro level.

Life-cycle theory relates to an organism, that is a system with a clearly defined boundary that contains the organism for the duration of its life. As a separate entity, the organism achieves optimal functioning through built-in feedback mechanisms that maintain homeostasis. This approach is therefore appropriate for a functional, purposive, and mechanical system, as previously discussed and presented (Figure 2.4). Unlike an organism, the tourism system does not inherently possess feedback functions that fine-tune the system to ensure optimal performance. However, the tourism system is organismic rather than mechanical, as change can result when one part or connection is changed or removed. Instead of focusing on the changing system it maybe “more fruitful to look underneath the process to see what really drives it” (Porter, 1980 p.7).

This discussion of the life-cycle model illustrated its use as a descriptive tool, whereby the past pattern of destination growth can be generated. However, this model does not incorporate the complex dynamics operating within a destination, or explain why change occurs. Additionally this model represents change as an overall, gradual process.

A more detailed understanding of tourism destination change requires a model that is appropriate for open, complex, and dynamic systems. Such a model should also be applicable at both the macro destination level and the micro levels, generating variable change rates for system elements. This would provide a more complete picture of the overall change and the complexity within. The following section reviews candidature process of change theories and their application to tourism destinations.

2.5 Alternative Candidate Theories on the Processes of Change

Tourism can be considered an evolutionary process. Change has been identified within elements of the dynamic tourism system, including people, activities, resources, perceptions, impacts, control, markets, and rate of change (Butler, 1993). Although such change is acknowledged as a critical factor, the reasons for change are not clear. The destination life-cycle model has assisted in describing tourism destination change, but the manner in which tourism destinations develop and the causes of the development are not well understood. Gaps exist in the knowledge regarding the turbulent periods of destination development, and in the fundamental causes of change (Hall & Butler, 1995; Russell & Faulkner, 1999; Carter, 2000).

This section presents three alternative theories on the processes of change: the Theory of Species Evolution, Punctuated Equilibrium, and Chaos Theory. For each of these theories I will explain their significant concepts, past application of the theory to the study of tourism, and their appropriateness for analysing an open and complex system such as tourism.

The life-cycle concept, presented in the previous section, is based on the stages of life through which higher organisms progress, from birth through to death. Another biological

description of change provides the basis of the first alternative theory, to be termed for this study, the Theory of Species Evolution. This candidature process of change theory focuses on the population level of a species, rather than the life-cycle of an individual organism, and incorporates various forms of change and periods of stagnation within a non-sequential framework.

I then present a second alternative theory, the Punctuated Equilibrium model. This theory was identified within the field of bioevolution by Stephen Gould and Niles Eldredge (1972), and has been applied within the social sciences (Levinson et al., 1978; Tushman & Romanelli, 1985; Gersick, 1988, 1991; Wollin, 1995). The model illustrates periods of stability or equilibrium that are punctuated by periods of rapid change. Inherent in this theory are the triggers that cause the revolutionary style of change.

The final change theory considered is Chaos Theory. The term encompasses the work of numerous scientists during the 1970's and 1980's into the study of 'dynamical systems' and the apparent order in the chaos (Gleick, 1987). A significant concept of this theory takes the Punctuated Equilibrium theory a step further as it highlights the situation whereby the impact of a change can restructure the system, whether it is caused by an individual, a seemingly small change, or an external, apparently unrelated change. This is often referred to as the butterfly effect. Other relevant concepts offered by Chaos Theory include bottom-up synthesis or self-organisation, lock-in effect, edge-of-chaos and bifurcations (Faulkner & Russell, 1997).

2.5.1 The Theory of Species Evolution

Biology, the science that inspired the product life-cycle concept, also provides the basis for an alternative product growth theory. Instead of focusing on the life-cycle of a single organism, this evolutionary approach considers the changes within a species over time.

Unlike life-cycle theory, Darwinian evolutionary theory is used as a model to explain the phenomenon of growth, proliferation, and extinction of a species (Leakey, 1979). Such an evolutionary approach appears appropriate for describing product growth and change. The underlying concept of this theory is the gradual evolution of a species through adaptation and natural selection. These concepts will be discussed below.

2.5.1.1 Evolution

Evolution is generally considered to be gradual change through natural selection, as proposed by Charles Darwin in 1859 (Leakey, 1979). This theory is predominantly used to understand adaptive changes in natural populations (Stansfield, 1977). It is important to realise that evolution is in fact a process. This process affects change in the gene pool of a species and ultimately the expression of these genes in individuals and the population (Stansfield, 1977).

In theory, a species population can be in genetic equilibrium and maintain its current genetic composition from one generation to another. However in nature, with its changing environments and species variation, the evolutionary process is virtually unavoidable and indeterminate (Stansfield, 1977).

Darwin's concept of natural selection is based on two consistent premises and a resultant outcome:

- Firstly:** "Organisms vary, and these variations are inherited (at least in part) by their offspring.
- Secondly:** Organisms produce more offspring than can possibly survive.
- Conclusion:** On average, offspring that vary most strongly in directions favoured by the environment will survive and propagate. Favourable variation will therefore accumulate in populations by natural selection" (Gould, 1977 p.11).

Evolution through natural selection is often described as 'survival of the fittest'. This is despite Darwin relating survival to reproductive contributions rather than fitness. In practice the natural selection concept is really based on 'survival and reproduction of the fitter' (Stansfield, 1977).

Natural selection results in a number of cumulative alterations in the underlying structure of the species (Van de Ven, 1992). These methods of change include variation, selection (sorting), retention, and the struggle for existence (competition) (McKelvey & Aldrich, 1983). Variation as the first type of change, occurs at random in biology. However in the business world variation may be blind or purposeful. A blind variation occurs by chance or accident, while a purposeful variation is an intentional adaptive reaction to an external

environmental change. Secondly, selection occurs on the basis of ultimately achieving a better match between the 'population' and its 'environment' (Wollin, 1995). Thirdly, retention relates to the ability to maintain the variations within a population that best fit their environmental niche (McKelvey & Aldrich, 1983). Finally, the struggle for existence is the inherent desire to survive and propagate. As natural selection encompasses these four methods of change, Darwin's theory presents natural selection as the creative factor in the evolutionary process. Evolution by natural selection is not just a selection process that simply executes the unfit (Gould, 1977).

2.5.1.2 Role of Adaption

The findings of population ecology since its development during the 1950s have generated further understanding of the concept of adaption. Evolutionists have discovered that in addition to changing their size and shape, a species can alter its 'life history strategies' by adjusting the timing of life or the level of energy invested in various activities such as feeding, growth, and reproduction (Gould, 1977).

As adaption is a gradual process, there is often a period before a specific adaption is useful in a particular way. This stage has been termed preadaption, despite the misleading inference that it occurs in preparation for a future adaptive requirement. A result of this preadaption concept was the realisation that a species can significantly alter its function with only minimal adjustment being made to the form (Gould, 1977). Ultimately, mutations are considered the basis of a new genetic composition (Stansfield, 1977).

2.5.1.3 Application of the Evolutionary Cycle to the Development of Products

Gross (1968) suggested that the evolution of species, as described by the theory of natural selection, would be an appropriate model to explain the development of products in a free market economy. This concept utilises biological terms which have parallels in the business sector (Table 2.3). Additionally, the methods used by species for continuing survival have business strategy counterparts. Specialisation, flexibility, and adjustment to changing environments are all recognised behaviours in both settings. Selection of one of these three strategies can influence abilities in the other areas. For example, high levels of specialisation cause decreased flexibility and lower capabilities for immediate adjustment to

change (Gross, 1968).

Table 2.3 Business Sector - Biological Evolution Terms.
Application of biological evolutionary terms to the business sector (Gross, 1968).

Biological Term	Business Term
Species	Product
Variation	Product Differences
Overpopulation / Overcapacity	Excessive Competition
Struggle for Existence	Struggle for Existence
Survival of the Fittest	Survival of the Fittest
Survival	Success / Growth

Tellis and Crawford (1981) applied the concepts of species evolution to marketing and product change. The process of evolutionary change for species and products is a gradual continuous change that is:

1. Cumulative - adaption/changes are cumulative as well as successive, so the change is building on the old to produce a new improved version.
2. Motivated by (three) defined forces
 - * Generative - the genetic system (managerial and entrepreneurial creativity)
 - * Selective - the environment (market with consumers and competitors)
 - * Mediative - humans (government and other agencies)

Each of the defined forces has a unique role and yet is an interdependent part of the system.

3. Directional - moving towards increasing diversity and complexity (efficiency/progress)
4. Patterned - five patterns in the process of biological evolution are:
 - ⇒ cladogenesis - substantial divergence from previous species
 - ⇒ anagenesis - adaption to environment
 - ⇒ adaptive radiation - subspecies adapting to an environmental niche
 - ⇒ stasigenesis - stability/stagnation
 - ⇒ extinction - unable to exist (Figure 2.12) (Tellis & Crawford, 1981)

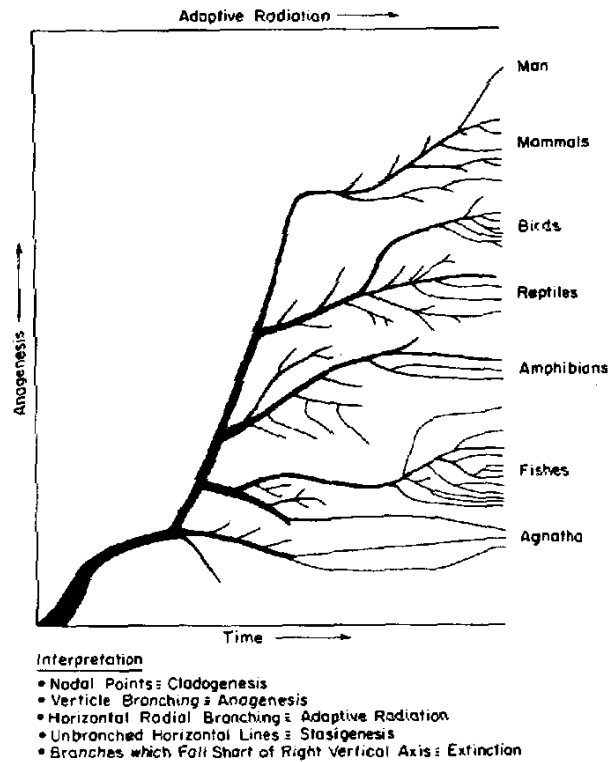


Figure 2.12 The Five Patterns of Biological Evolution.
(Tellis & Crawford, 1981).

Except for the first and final patterns, there is no set order, duration, or restriction on the pattern being reapplied. Although these patterns may appear similar to the life-cycle theory, it is the crucial differences of non-sequentiality and repetition that cause this evolutionary theory to be more appropriate in describing product change (Tellis & Crawford, 1981).

2.5.1.4 Application of the Evolutionary Cycle to Firms and Organisations of Firms

Species Evolution theory has not just been applied at the product level. It has also been applied to the evolution of individual organisations, and the evolution of populations of firms (Wollin, 1995). Within a firm ‘routines’ can be considered to perform the role of genes, as they include all the regular and predicable behaviour patterns of firms (Nelson & Winter, 1982). Over time the routines are varied, selected, and retained. Activities designed to change routines are still considered routines, although they do provide a mechanism for changing the firm’s routines (Nelson & Winter, 1982).

These routines have also been termed 'decision rules' by Mahoney (1992). Preforming the role of genes, these 'decision rules' are generators, creating change through problem-solving activities, entrepreneurial discovery and random activity (Mahoney, 1992). Selection progressively eliminates, or reduces the role of firms with inferior decision rules or routines (Mahoney, 1992; Norton & Bass, 1992; Wollin, 1995). The application of the species evolution theory to organisations can therefore be seen to explain change within firms and their disappearance from the marketplace, but it does not explain how new firms emerge (Wollin, 1995).

Application of the theory of species evolution at a macro level considers populations of firms. This theory explains how certain organisation forms occur in particular environments (Aldrich et al., 1984). The common form within a population of firms plays the role of genetics, as it is the form that has been modelled from natural selection processes (Hannan & Freeman, 1989). Evolution at the population level is the result of the combined routines of all the firms. The continuing firms exhibit the common dominant competencies (routines) (McKelvey & Aldrich, 1983). "A niche is the activity space of an organisation or population or community of organisational forms that reflects the sum total of both its adaption to environmental forces that are not subject to its influence and the adaption of environmental forces that are subject to its influences" (McKelvey & Aldrich, 1983 p.111). This evolutionary change theory is therefore considering the role of external systems. Following the biological analogy, the theory of niches, with its mathematical methods, has been applied at the population level to fitness functions, niche width and overlap, carrying capacity, population density, and generalist and specialist strategies (Wollin, 1995).

Although the basis of species evolution theory is built on gradual evolution and natural selection, it is recognised that in business forces can work against this process. Organisations tend to maintain the social structure that was appropriate at the time of their founding, rather than adapting to suit the changing social environment (Stichcombe, 1965). This has since been termed 'structural inertia' (Hannan & Freeman, 1989). Factors which constrain structural change and cause this inertia can be internal or external. Forces acting within a company include investments and assets, limited information, internal politics, and organisational histories or established routines. External forces consist of entry and exit barriers, limited information, and established links and commitments to other companies (Hannan & Freeman, 1989). Although structural inertia can ensure the retention of positive

structural and cultural components, it also minimises the capacity of the organisation, or population, to adapt to the changing environment (Wollin, 1995). Consequently environmental selection occurs instead of adaption, as a totally new organisational form takes over from the previous form (Astley & Van de Ven, 1983). The forces of inertia are considered to operate in a hierarchical manner, with certain aspects of a population's form being easier to change. Structure and peripheral activities are more likely to adapt than the core elements or 'nature' of the organisation (Hannan & Freeman, 1989).

The focus of the energy and resources of a company will depend on the level of competition in the market place. As mentioned, population ecology illustrates the ability of a species to alter its 'life history strategies'. One option is to focus on reproduction, sacrificing intricate morphological adaption. Such a species is deemed an *r*-strategist¹⁴. Alternatively a species within a stable environment, with a population close to the carrying capacity of the environment will utilise *k*-selection¹⁵ and focus on fine-tuning their design, rather than reproducing (Gould, 1977). Applying this concept to the business world, an environment comprised of multiple firms uses the level of competition to determine which adaption strategy is appropriate. An *r*-selection could be undertaken by a firm experiencing low competition as they can continue to function without the best set of routines. However, if competition is high, a firm needs to adjust itself and its products to ensure their design remains viable and competitive.

2.5.1.5 Applying the Concepts of Species Evolution to Tourism Development

Even before the life-cycle theory was applied to the field of tourism, the concept of product evolution had been proposed. The popularity of the life-cycle model appears to have limited the application of species evolution theory.

¹⁴ *r* is the measure of 'intrinsic rate of increase in population size'. *R*-strategist applies to species which face irregular and catastrophic reductions in population numbers and which then need to focus primarily on reproduction when conditions improve (Gould, 1977).

¹⁵ *k* is the measure of environmental 'carrying capacity'. *K*-strategist relates to species in stable environments with a population around the carrying capacity. Over-reproducing achieves no long-term change so the aim is to raise a small number of highly suited offspring (Gould, 1977).

The concepts and biological terms of evolutionary theory which have parallels in the business sector, as proposed by Gross (1968), have been applied by Haywood (1986) to tourist areas (Table 2.4).

Table 2.4 Business Sector - Biological Evolution - Tourism Destination Terms. Building on the application of the biological evolutionary terms to the business sector (Gross, 1968) from Table 2.3 with the further application of these terms to tourism areas/destinations (Haywood, 1986).

Biological Term	Business Term	Tourism Term
Species	Product	Tourist Area / Destination
Variation	Product Differences	Destination Differences
Overpopulation / Overcapacity	Excessive Competition between Products	Excessive Competition between Destinations
Struggle for Existence	Struggle for Existence	Struggle for Existence
Survival of the Fittest	Survival of the Fittest	Survival of the Fittest
Survival	Success / Growth	Success / Growth

Natural selection within species evolution theory was paralleled with product evolution within a free market economy. Application of the evolutionary theory was at a macro level, considering an organism to correspond with a tourist destination. Variation within this 'species' of tourism destinations is the significant differences between each area. Inherent in the law of natural selection is the concept of overpopulation. Within tourism, there is an abundance of individual destinations, resulting in considerable competition caused by this level of capacity. The concepts of 'struggle for existence' and 'survival of the fittest' are appropriate descriptions for the business of tourism. This level of competition ensures that the tourism destinations most suited to the marketplace (environment) are most likely to survive, resulting in success and growth (Haywood, 1986).

2.5.1.6 Limitations of Species Evolution Theory

While it is apparent that selection has occurred in natural populations, the inherent nature of the process and its causes are difficult to either prove or disprove (Stansfield, 1977). Population ecology does not address the origins of the populations, or how evolution occurs "through the proliferation of heterogeneous organisational types" (Astley, 1985 p.224). Population ecology focuses on the processes of evolution as seen in established populations. When applied to the business context it can explain change within firms and their

disappearance from the marketplace, but it does not explain how new firms emerge (Wollin, 1995). As population ecology examines the slow gradual changes, the theory does not address revolutionary change, such as the emergence of a new population (Astley, 1985). It is therefore limited as a useful model for predicting where or when tourism systems may develop.

As already mentioned, there are significant differences between biological and social systems. The predictable biological growth curves are not necessarily applicable to social phenomenon (Katz & Kahn, 1978). In addition the theory is deterministic as both types of change, adaption and selection, are a result of the forces of the external environment (Astley & Van de Ven, 1983). The theory of population ecology is based within a highly competitive environment, causing the concepts to only apply in such conditions (Young, 1988).

It has been questioned whether all changes in natural populations are caused by gradual evolutionary change. Richard Goldschmidt (1878-1958) considered the possibility of a 'hopeful monster' caused by a sudden drastic change within a species that was suitable within the environment cited in (cited in Stansfield, 1977). This is not to imply that some changes in the natural world do not occur through the gradual evolutionary process. If this were not so, a new species would simply appear and the selection process would then remove the previous species (Gould, 1977).

2.5.1.7 Relevance of Species Evolution Theory to this Study

The common form within a population of firms can be likened to the role that genetics play for a species, as it is the form that has been modelled from natural selection processes (Hannan & Freeman, 1989). This concept can be paralleled in tourism with the common destination type, and within destinations as the common form of tourism in the destination, as they change over time.

Unlike an organism, a species can significantly change form to adapt to the external environment. The interaction between the species and the outer world defines the way that the evolutionary process will progress. The tourism system is closer in type to a species than to an organism as external systems play a significant role in the development and

evolution of a tourism destination. Additionally the tourism system is not composed of a number of different organs that each has a specific role in ensuring that the system functions optimally. Rather, the components of the tourism system are often competing with each other for survival, and the number and their roles fluctuate over time as the environment changes.

The species evolution theory provides important concepts on the processes of change as it aims to explain how the species evolve. There are fundamental aspects common to the complex system of species evolution and the tourism destination system, as both change over time, are affected by changes in one part or connection, and aim to survive. Both systems are therefore classified as functional, organismic, and purposive. The species evolution theory can therefore be a useful model for explaining and understanding the manner in which tourism destinations evolve.

In terms of the change that occurs in a system (Section 2.3.2.1), Ison and Russell (2000) highlighted the two distinct types of system change. First-order change involves changing inputs and outputs within the existing established framework of the system. This type of change can therefore be understood by using the concepts from the theory of species evolution, as this theory focuses on evolutionary change that occurs within the system boundaries. Second-order change, which involves the modification or restructuring of the whole system, will be addressed through the use of concepts from punctuated equilibrium and chaos theory, which are discussed in the following section.

2.5.2 Transdisciplinary Theories

In addition to the General Systems Theory that is being used as a framework for understanding tourism destination change, a second transdisciplinary theory is relevant for this study: the General Theory of Evolution. This transdisciplinary theory is the umbrella term used for a number of overlapping theories that were developed within various individual fields during a similar period of time (Laszlo, 1991). These theories, that have been applied within other domains, include Chaos Theory (Gleick, 1987; Abraham, 1991; Laszlo, 1991; Loye, 1991; Gilgen, 1995; Goerner, 1995), Evolutionary Theory (Waddington, 1975; Ho & Saunders, 1979; Prigogine & Stengers, 1984), Transformation Theory (Loye, 1991; Malaska, 1991), Nonequilibrium (Thermodynamics) Theory (Artigiani,

1991; Loye, 1991), (Complex) Dynamical Systems Theory (Abraham, 1991), and Punctuated Equilibrium (Eldredge, 1972; Eldredge & Gould, 1972; Gould & Eldredge, 1977; Eldredge, 1986, 1995; Wollin, 1995). These theories can be united under the banner of General Theory of Evolution as they move beyond the linear, mechanistic approach of the classical Newtonianism that has driven science over the last three centuries, to a nonlinear approach which incorporates complex and chaotic aspects into the study of open, dynamic systems (Laszlo, 1991).

Two theories that are both within the General Theory of Evolution and are applied in other domains are relevant for the further understanding of the change processes that occur within tourism destinations. These theories, Punctuated Equilibrium, and Chaos Theory are used in fields from engineering to ecology and business. They will now be introduced and their application to tourism reviewed.

2.5.3 Punctuated Equilibrium

The Punctuated Equilibrium theory was identified within the field of bioevolution (Eldredge & Gould, 1972) and has been applied within the social sciences (Levinson et al., 1978; Tushman & Romanelli, 1985; Gersick, 1988, 1991; Wollin, 1995). The punctuated equilibrium change paradigm proposes that systems remain relatively stable for prolonged periods (equilibrium) with rapid revolutionary change occurring periodically (punctuations).

An important concept of punctuated equilibrium is that in some cases the variable measured may exhibit the punctuational pattern. Alternatively the pattern may appear to represent gradual change. However if this variable is separated into its component parts, the pattern for these parts may well be punctuational. The sum of these component punctuational patterns results in the overall 'gradual' pattern.

This is particularly relevant for understanding the change pattern produced by the development of a tourism destination. Even where a change appears to be gradual, it may be hypothesised that punctuations underlie the smooth destination pattern.

2.5.3.1 The Development of the Punctuated Equilibrium Paradigm

This step-by-step concept of change emerged from multiple fields, including the study of change in individuals, groups, organisations, scientific discovery, grand theory, and biological species. The term was initially used to describe this pattern of change by the biologists Niles Eldredge and Stephen Gould in the context of evolution as portrayed by fossil records (Eldredge & Gould, 1972). The process of speciation was reviewed, resulting in a ‘punctuated equilibria’ view of the history of life, with homeostatic equilibria only rarely affected by rapid change (Eldredge & Gould, 1972). Within this bioevolution field, evolution is depicted as a discontinuous multi-level process arising from the hierarchical organisation of the stable genetic structures and the ecological environment (Wollin, 1995). The genealogical hierarchy provides the sources of information that form the basis of the functional system, while the ecological hierarchy establishes what information, both conventional and innovative, is retained. This perspective provided the basis for punctuated equilibrium, which incorporates both incremental and discontinuous change.

2.5.3.2 The Theory of Punctuated Equilibrium

Punctuated equilibrium is a proposal about the ‘mode’ of evolution (Gould & Eldredge, 1977). Conceptualising change from a punctuation view establishes long term evolution as the culmination of equilibrium and revolution. The interrelation between these two states is determined by the highly durable underlying order. This order was termed ‘deep structure’ by Gersick (1991), as it fitted the description used to distinguish the deep structure of a sentence from its surface structure (Chomsky, 1966). The punctuated equilibrium concept is therefore based on the three components: deep structure, periods of equilibrium, and periods of revolution.

The deep structure of a system is stable during the equilibrium state and in fact limits change. It is composed of multiple dimensions, including knowledge, organisation, and social culture. Inherent in this theory of change are the hierarchically structured characteristics of these dimensions. Certain aspects of each dimension are more fundamental to the system structure than others. These fundamental aspects of the deep structure are resistant to change (Wollin, 1995) and cause the prolonged periods which allow only incremental adaptations to the system (Gersick, 1991). Within biology the deep structure encompasses the genealogical hierarchy (Gersick, 1991).

According to the punctuated equilibrium theory, revolutionary change in a system results from the inter-dependant interaction between the deep structure of the system, the wider environment, and the actions of those within either the system or the wider environment (Wollin, 1995). During the revolution stage, the deep structure disassembles and reconfigures. A change is only a revolutionary punctuation if the deep structure is fundamentally transformed (Gersick, 1991). As punctuations are significant reconstructions of the fundamental aspects of the deep structure of the system, the punctuation can be considered a process of change.

The punctuation commences with purposeful action from either within the system or from the wider environment. The action can trigger change if not constrained by the existing deep structure of the system, or the wider environment. This initial stage of the revolutionary change generates an irregularity that deconfigures the deep structure of the system. Three significant types of purposeful action include innovation, changing relationships with others, and choice or decision-making (Wollin, 1995). The second stage of the punctuated change is the development of variations within the system, which occur during the reconstruction of the deep structure. Thirdly, sorting may occur to establish which variations are compatible within the reconstructing deep structure. This generates a preferred deep structure. The final stage of stasis is the establishment of a new and durable deep structure which then commences the next period of equilibrium (Wollin, 1995).

Understanding that the underlying principles of systems differ and are changeable, clarifies that triggers that cause change in one system may not affect another, and that constant drivers may not, in reality be constant (Gersick, 1991).

2.5.3.3 Differences between Punctuated Equilibrium and Traditional Paradigms

The punctuated equilibrium theory of change is not attempting to replace the previous gradualism approach to evolution. Instead it offers another pattern which may help explain change within the complex natural world, and a broad “new interpretation of evolutionary trends” (Gould & Eldredge, 1977 p.139).

Punctuated equilibrium, as an explanatory mechanism for change, differs from traditional thought on the process of change in three fundamental ways. Firstly, gradualist paradigms consider change as a slow progression from form to form. Large changes are perceived as simply the culmination of multiple small changes. Additionally, the traditional theories imply that change is always possible, and simply waiting for the opportunity, or need to adapt, rather than prevented as punctuated equilibrium suggests. Secondly, theorists applying the concepts of punctuated equilibrium do not accept that systems of the same type must develop in the same direction. Finally, the punctuation view is that the development need not always be in a 'forward' direction (Gersick, 1991).

The theory of punctuation equilibrium offers explanations for previously unexplained information, gaps or occurrences. Within the study of palaeontology, information that indicates a punctuated equilibrium change process was previously considered imperfections within the fossil record (Gould & Eldredge, 1977).

A notable limitation of traditional models is the minimal attention paid to the mechanisms of change (Gersick, 1988). Significant to this study is that the punctuated equilibrium model of system change recognises that strategic intervention can trigger revolution.

2.5.3.4 Application of Punctuated Equilibrium to Tourism Destinations

Within the social sciences the punctuated equilibrium model has been used to describe change in individuals, groups/teams, organisations, industries, economics, technology, and the philosophy of science (Gowdy, 1990; Mokyr, 1990; Gersick, 1991; Wollin, 1995). Treatment of the change theory within the social sciences has ranged from a general application of the overall concept of stability being punctuated by significant change, to more detailed use of the underlying concepts, including the interaction of a system's hierarchies.

However, this theory has not been directly applied to the development of tourism destinations. Despite this, the concept of change occurring in a step by step manner has developed as an alternative to Butler's classical Destination Area Life-Cycle model (1980). Carter (2000; 2004) presents a Notional Episodic Model of Tourism Growth (Figure 2.13)

that is based on the empirical study of tourism destinations. This model indicates that growth is not always gradual and instead occurs in sporadic steps.

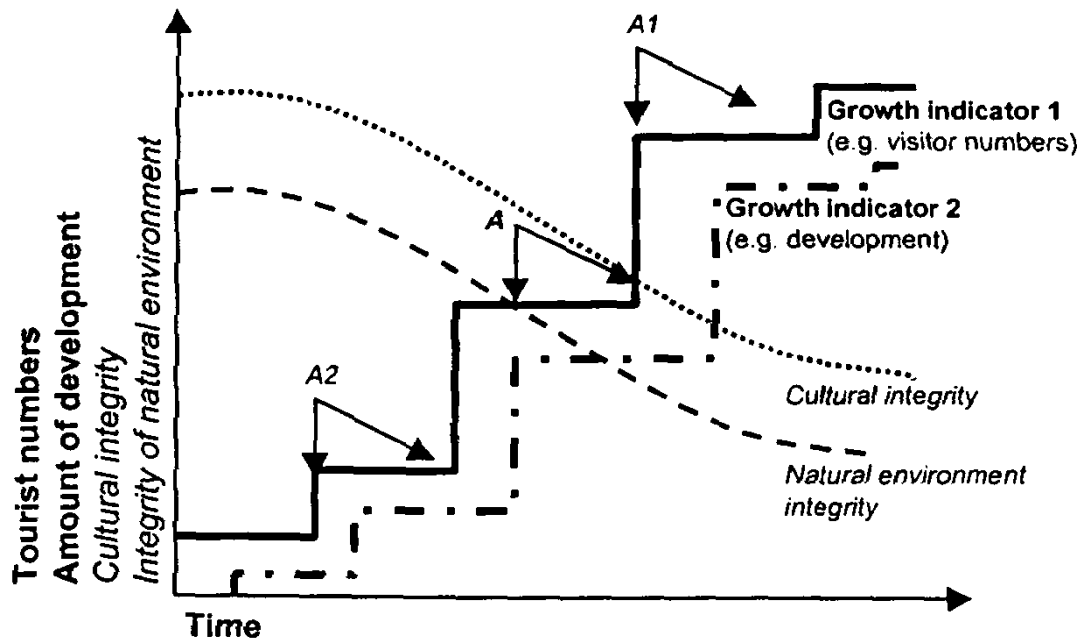


Figure 2.13 Notional Episodic Model of Tourism Growth.
(Carter, 2000; 2004).

Episodic change can occur within a tourism destination in two ways. Firstly, the number of visitors corresponds to the facilities on offer. This level of infrastructure is not usually expanded gradually, as development occurs in definite steps. Secondly, visitor numbers can demand extra infrastructure. The provision of these extra facilities often occurs in a burst of development. The pattern of growth is therefore independent of whether destination growth is supply or demand driven, as both options can result in sporadic change (Carter, 2000).

2.5.3.5 Relevance of the Punctuated Equilibrium Theory to this Study

The theory of punctuated equilibrium offers an explanation for sporadic revolutionary change, which is not considered by either the life-cycle model or the theory of species evolution. Punctuated equilibrium theory considers long-term change as the product of both incremental changes, during the equilibrium state, and the dramatic change occurring during the punctuation phase. In addition, punctuated equilibrium theory recognises that differences in the fundamental deep structure of similar systems results in dissimilar

responses to a change. Other significant aspects of this theory are the concepts that changes may not always be in the forward direction, and that intervention can play a major role in causing change.

Similar to species evolution, this theory focuses on the important role that the external environment can have on parts of the system. Additionally both theories incorporate aspects within the system that are resistant to change, as well as the role of the external environment in constraining change.

A theme consistent to the three process of change theories is the role of innovation, whether it be in early stages of development (Life-Cycle Theory), during the evolution of the destination (Species Evolution), or in dramatic changes (Punctuated Equilibrium).

The Punctuated Equilibrium theory is an appropriate process of change theory for the study of tourism destination change as it can explain how two different types of change can occur within the system. These changes within a system have also been discussed (Section 2.3.2.1), as first and second order change (Ison & Russell, 2000). First-order change involves changing inputs and outputs within the existing established framework of the system. This is the adaptive change that occurs in the 'equilibrium' stage of the punctuated equilibrium theory. However, the types of change that can occur during this phase are presented in greater detail by the theory of Species Evolution (Section 2.5.1). The second-order change that involves the modification or restructuring of the whole system. This is the punctuation, that is addressed by the punctuated equilibrium theory. Concepts from chaos theory also offer insight into the reasons why such dramatic change occurs. This theory is presented in the following section.

2.5.4 Chaos Theory

Chaos Theory, or deterministic chaos, is the study of dynamic phenomenon with nonlinear characteristics (Sardar & Abrams, 1999). This approach has been seen by some to challenge Western, classical, linear science, which commenced with the 'Newtonian paradigm' focus on deterministic and time-reversible laws (Prigogine, 1991). Chaos theory considers dynamical systems that are not predictable. At high levels of complexity it is not possible to distinguish randomness from order. Chaos theory recognises that nonlinear systems which

exhibit unpredictable random activity may in fact be highly complex and organised (Vilkins, 1993). The perception is that a system whose behaviour cannot be explained by a classical set of equations, is not necessarily random, as the real level of complexity may not be incorporated into the equations (Briggs & Peat, 1989).

Since the beginning of the 1960s, scientists and researchers from varying disciplines have discovered concepts which question the roots of traditional, reductionist science (Vilkins, 1993). These discoveries are linked together under the umbrella term Chaos theory, and include Catastrophe theory (Thom, 1975), Evolutionary theory (Prigogine & Stengers, 1984), Transformation theory (Loye, 1991), Nonequilibrium theory (Loye, 1991), and Complex Dynamical Systems theory (Abraham, 1991).

Aiming to increase awareness of the growing concept of deterministic disorder Li and Yorke (1975) published a paper titled 'Period Three Implies Chaos'. An important point made in the report was that science deems reality as ordered with pockets of disorder, when it may really be order existing in a chaotic reality. This is illustrated by the fact that low-order deterministic systems can still generate exceedingly complex and unpredictable behaviour that can appear to be chaotic or random (Vilkins, 1993). The significance of the title of the paper was that the term 'Chaos' became the word used for the associated theories regarding deterministic disorder (Gleick, 1987). If classical science is the study of order, chaos starts where classical science finishes. The classical science view is a mechanistic model of reality. In comparison chaos theory sees reality "as infinite, irreducible to one thing, heterogeneous, multifaceted and ongoing...creative in contrast to unchanging, and directed with time rather than timeless" (Vilkins, 1993 p.ii).

Any system can behave very differently if instead of being at or near equilibrium, it is operating in nonequilibrium conditions. As the system moves away from equilibrium the descriptive equations change from linear to nonlinear. These nonequilibrium conditions generate complex dynamics, multiple choices (bifurcation), and the opportunity to self-organise (Prigogine, 1991).

Levels of chaos in non-linear systems have been categorised, as 'Stable System', 'Dynamic Chaos System', or 'Totally Turbulent System' (Nilson, 1995); 'Low Dimensional Chaos' or 'High-Dimensional Chaos' (Elliott & Kiel, 1997); and 'Weak Chaos' or 'Fully Chaotic'

(Mathews et al., 1999). In reality, non-linear systems are likely to be on a continuum determined by the susceptibility of the system to chaotic behaviour (Russell, 2000). This allows for the combination of both 'structured' and 'anarchic' processes to occur concurrently (Pinfield, 1986).

As chaos theory proved useful in fields of research as diverse as weather prediction, moth populations, the clustering of stars, and heart attacks (Gleick, 1987) it became apparent that natural systems can be non-linear. As interaction involving human beings is significantly more complex than systems such as the weather, it can be assumed that relations between humans are most probably non-linear (Nilson, 1995). Chaos theory is therefore a prospective approach appropriate for the study of activities that involve the complex interaction of human, economic, and natural systems, such as tourism.

Utilising chaos theory requires a holistic approach. The object of study is dynamic systems and their continually fluctuating sub-systems (Vilkins, 1993).

2.5.4.1 Application to the Social Sciences

Science is not external to society. Science affects society and in turn is effected by it. Due to the prominent role of technological success, science now plays a major role in social attitudes, thinking, and decision-making. Developing a social theory from the concepts of chaos theory provides a 'meeting ground' for both science and the humanities (Vilkins, 1993).

Approaching the study of society from a chaos perspective requires application of the principles and concepts at a philosophical level, rather than as a quantitative science (Ruelle, 1991). In order to quantitatively study chaos within a system it is necessary to understand the systems' dynamics. Equations of evolution can be defined for systems such as solar astronomy and hydrodynamics. However, biological and social systems change in ways that cannot be precisely gauged, as the dynamics are complicated, and the change patterns themselves can evolve (Vilkins, 1993). According to Burlingame, Fuhrman and Barnum (1995) the main concepts within chaos theory which lend themselves to conceptualising the complexity of the human process are nonlinearity, multiple interactive parts and system evolution.

2.5.4.2 Chaos Theory Concepts Applicable to Tourism Development

Application of chaos theory usually involves the determination of complicated equations that can be used to understand and predict the behaviour of complex and dynamic systems. This is an important contribution of this theory as it incorporates factors that would have previously been considered 'background noise' and eliminated in order to identify the 'true' picture (Parry & Drost, 1995).

To date, the significant number of parts and interrelations that operate within a single tourism destination system does not allow the calculation of equations to describe all the change that can occur. Applying chaos theory to tourism therefore results in an application of the underlying concepts within the theory. Five such concepts that can assist in understanding the development of tourism destinations have been identified by Faulkner and Russell (1997). These concepts are the butterfly effect, bottom-up synthesis or self-organisation, lock-in effect, edge-of-chaos, and bifurcations or multiple choices.

The Butterfly Effect:

Models based on 'order through fluctuations' consider the significant role of small changes, or fluctuations, to cause huge ramifications within unstable systems (Prigogine & Stengers, 1984). As this concept is based on small adjustments in input resulting in significant changes it has also been termed 'sensitive dependence on initial conditions' (Gleick, 1987). The common name, 'the butterfly effect', is due to the identification of chaos within meteorology by Edward Lorenz in 1960, and his exaggeration of this concept, indicating that the fluttering of a butterfly's wings in could result in dramatically different weather patterns in far-reaching parts of the world (Briggs & Peat, 1989). The butterfly image (Figure 2.14) is synonymous with chaos theory as it highlights one of the critical concepts presented by this theory: the holistic nature of dynamic systems which allows a small change to cause significant results because of the organismic relations between the components (Vilkins, 1993; Sardar & Abrams, 1999).

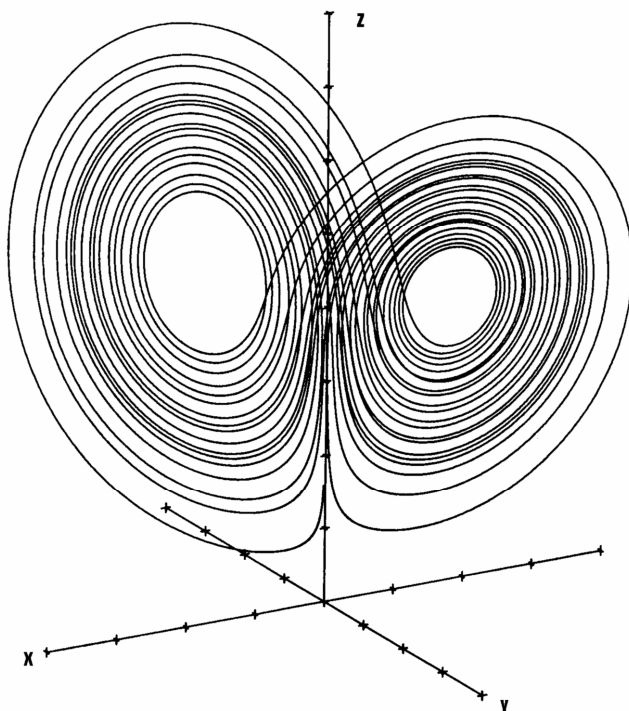


Figure 2.14 **The Butterfly Effect Image.**
 The symbol associated with Chaos Theory, as it illustrated the fine structure that occurs within an apparently disorderly data stream (Gleick, 1987).

The ‘butterfly’ concept had previously been proposed within Catastrophe Theory (Thom, 1975). This theory, which developed as a special branch of dynamical systems theory, focused on the manner in which continuous action produced a discontinuous outcome. One aim of Catastrophe Theory was to understand the situations in which change results in ‘catastrophes’, or abrupt changes (Thom, 1975). The study was of phenomena that exhibited sudden shifts as a result of a small change in circumstances (Briggs & Peat, 1989). Despite widespread application in the physical, biological and social sciences Catastrophe Theory was limited by the lack of quantitative prediction. Although the change and complexity of tourism systems cannot currently be quantified, the catastrophe concept is still applicable to understanding tourism destination change.

Within classical science very small influences are often simply neglected as the basis is in approximation and convergence (Gleick, 1987). Small changes are not expected to result in large effects and are generally deemed noise or error (Briggs & Peat, 1989). Random fluctuations are expected to average out and divergence in an experiment is seen as a failure of methodology. Determinism assumes that given an approximate knowledge of initial

conditions and a knowledge of natural law it is possible to predict approximate behaviour of a system (Vilkins, 1993).

The significance of the butterfly effect is that it raises the question of why a small change can generate significant effects. Instead of ignoring the fluctuations chaos theory embraces both them and the unstable conditions that allow such significant repercussions (Prigogine & Stengers, 1984).

An aspect of the butterfly concept is the disproportional sensitivity of elements within a system to a small change. Certain elements may change drastically, others slightly, while some may not change at all (Smith, D. R., 1995).

The tourism example of a small change resulting in a dramatic change provided by Faulkner and Russell (1997) in their application of Chaos Theory to tourism, was the change in the state gambling restrictions in the US, which led to the development of Las Vegas. As will be discussed in Chapters Four and Five, changing non-tourism specific regulations can affect the industry significantly. In the late 1970s the Queensland government abolished death duties. Combined with the existing building and investment climate this change contributed to the unit building boom on both the Gold and Sunshine Coasts.

Bottom-Up Synthesis / Self-Organisation:

Within the biological world, pattern develops from within what appears as formlessness. A living organism is able to create and impose order upon itself (Gleick, 1987). In a similar manner chaos can create a new order that is infinitely complex (Briggs & Peat, 1989). Bottom-up synthesis implies organisation that incorporates aspects of the system working from internal guidelines to establish an order appropriate to all. This is significantly different from organisation that is top-down and controlling (Russell, 2000). Even if turbulence seems chaotic on the macro level, it can be actually highly organised on the micro level (Prigogine & Stengers, 1984). Self-organisation is considered an element of dynamic, open and living systems (Vilkins, 1993; Russell, 2000). The ability to self-organise addresses the apparent paradox of the Second Law of Thermodynamics, which expects continual and increasing entropy, despite matter becoming increasingly organised (Waldrop, 1992).

In the tourism industry self-organisation occurs between the various destination operators, with some in competitive relations, while other combine in cooperative relationships (Faulkner & Russell, 1997).

Lock-In Effect:

Certain elements of a system have a greater ability to withstand change and thereby restrict change. This 'lock-in effect' recognises that aspects of a system may remain unchanged despite multiple periods of chaos and stability. These locked-in features are usually entrenched in the basis of the system, immune to the changes, or inconsequential (Russell, 2000). The ability of these elements to prevent certain types of change relates to the deep structure concept of the punctuated equilibrium theory.

A tourism example of this lock-in effect is Las Vegas remaining THE gambling city within the US despite other states now allowing gambling (Faulkner & Russell, 1997). This 'first mover advantage' was also evident in the abolishment of death duties in Australia. Although other states followed Queensland in abolishing death taxes, the unit boom and subsequent bust was most significant in Queensland. This also illustrates the 'first mover risk'.

Edge-Of-Chaos:

A system may appear to be in an equilibrium phase when it is actually 'far from equilibrium' and 'on the edge of chaos'. Illustrating this scenario is sand piled onto a table to its maximum quantity. At this stage, it is difficult to establish the critical point when the table will overflow with sand. Additionally, the magnitude of the response is not predicable. The edge-of-chaos is therefore the state, which appears stable but is in fact ready to radically change itself (Russell, 2000). This precarious state can be a desired state for business, as to survive it is best to be as complicated as is workable, as this maintains an adaptable structure. Consequently an aim is to determine the distance from equilibrium to the threshold point at which fluctuations can cause a new type of activity within the system (Prigogine & Stengers, 1984).

In tourism, technological developments have changed in transportation types, resulting in tourists moving from a railway-based network to a car-based system (Faulkner & Russell,

1997). One sudden change, such as a political coup in an idyllic tropical island can change its entire tourism future.

Bifurcation / Multiple Choices:

While a system is at equilibrium or close to equilibrium, there is a continuing steady state that is controlled by an established set of parameters (Prigogine & Stengers, 1984). When a system is in a state of chaos there are various possible options and/or futures that present themselves. Bifurcations have been classified as 'subtle' (change in type), 'catastrophic' (creation or deletion), or 'explosive' (sudden large change) (Abraham, 1995). Each bifurcation can then lead to further bifurcations, as a bifurcation sequence is established (Liebovitch, 1998).

It is generally not possible to predict the new direction, at either the macro or micro levels. However, one factor may cause a particular branch to be selected. Additionally an understanding of the history of the system may indicate the future state (Prigogine & Stengers, 1984). As a number of future states are possible for a chaotic system, a single deterministic set of equations cannot be used to explain the future behaviour of the system (Vilkins, 1993). Early decisions during a chaotic stage have the most significant impact on the type of stability that is reached.

In tourism, the initial introduction of a five star resort into a destination, such as the opening of the Sheraton Mirage in the quiet fishing village of Port Douglas in North Queensland, Australia, results in a transition to an alternate future direction, in this case the change to upmarket clientele, and the subsequent additional provision of other five star products and services. This illustrates how an early decision regarding the tourism destination results in a particular path that may have been significantly different if the idea was not expanded upon.

2.5.4.3 Research Applying Chaos Theory to Tourism Destination Development

Application of chaos theory to the tourism arena has focused on applying concepts from within the theory to aspects or levels of tourism to assist in explaining and understanding the complex phenomenon.

Parry and Drost (1995) considered chaos theory appropriate for the analysis of the complex and diverse hospitality industry. Limitations of the existing models and forecasting methods are discussed in their paper, with the focus on the inability of traditional approaches to incorporate all the important factors. Forecasts based on incomplete information may result in huge differences over the medium to long term. A main reason for this is that the important factors are eliminated on the basis of being 'background noise' (Parry & Drost, 1995). Chaos theory is presented as a possible new approach to understanding the hospitality industry. A case study considering the application of the US 'quality philosophy' to Japanese industry is used to highlight three main concepts related to chaos theory. Firstly Parry and Drost (1995) believe the 'butterfly effect' should be accepted and embraced rather than presuming that planning can avoid all negative changes. Secondly, the concept of 'chain reaction' is used to explain the phenomenon where by a system that appears to function randomly is really a self-generating, non-linear turbulence that allows the significant expansion of one small idea. The final concept is the 'tornado effect', which results in chaotic trends that can take an abrupt and unexpected change in direction that did not occur in a similar situation in the past, or in a similar system (Parry & Drost, 1995). The ability of a system to suddenly change direction is an important concept that provides the basis for the composite model to be presented in the final section of this chapter. Additionally this 'tornado effect' can assist in explaining why an external change can influence two destinations in completely different ways.

The application of chaos theory concepts to tourism destinations was conducted by Faulkner and Russell (Faulkner & Russell, 1997; Russell & Faulkner, 1999; Russell, 2000). An aim of the research was to address the fact that chaotic factors are often overlooked when describing tourism development. To achieve this, a main focus of the research was to identify and understand the events and/or individuals that triggered significant change within a tourist destination. Utilising the past development of the Gold Coast as a case study, the research linked the various stages in tourism development to the activities of individual entrepreneurs. The research clarified the important association between chaos theory and entrepreneurship.

Concepts within chaos theory have also been applied to the tourism system by McKercher (1999). His paper argues that tourism is a non-deterministic, non-linear system that cannot be fully explained by existing tourism models. Chaos theory is presented as appropriate for

understanding complex systems and the way they function. Concepts from chaos theory are used as the base for a proposed Chaos Model of Tourism (Figure 2.15).

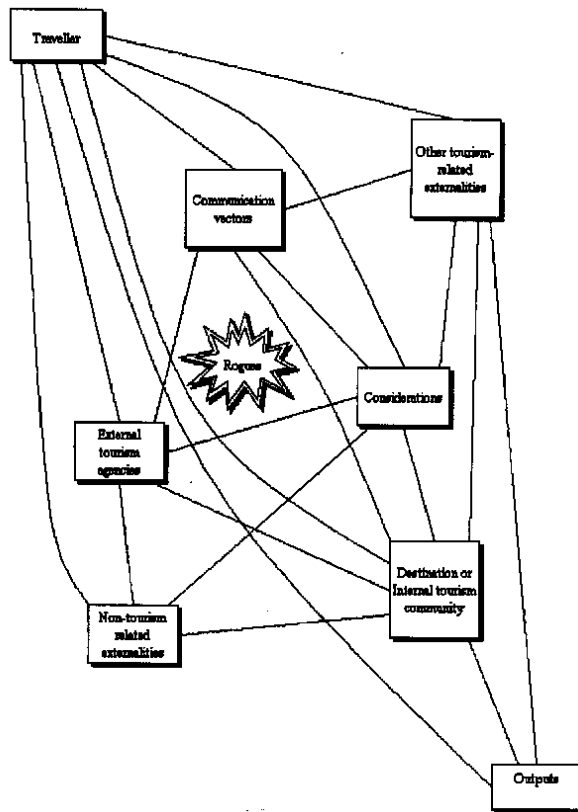


Figure 2.15 The Chaos Model of Tourism (McKercher, 1999)

An important implication of this model is the potential application at various levels, from the multi-national scale, through the destination level, down to a single enterprise (McKercher, 1999). This model divides the tourism system into nine main elements and illustrates the inter-relationships between these elements. This model is another approach to breaking down the tourism system into its’ significant parts (as discussed in Section 2.3.2.3). A significant difference between this model and the other approaches is the inclusion of ‘Rogues’ or ‘Chaos Makers’. This is an element of the tourism system that can push it to the edge of chaos. The focus on the agents of change is similar to the research by Russell and Faulkner (1997), who focused on the link between chaos theory and entrepreneurs.

2.5.4.4 Relevance of Chaos Theory to this Study

As chaos theory is a holistic approach to understanding unpredictable, non-linear, dynamic systems, it is appropriate for the study of a developing tourism system within a destination. The theory can be used to describe how a system is operating, but not how it will be in the future. This is partially due to the fact that studying an aspect of society using chaos theory is applying concepts at a philosophical level. Its use as a predictive theory is not possible at this stage, as unlike the physical sciences, equations cannot be generated that explain the dynamic social system.

Chaos theory is aimed specifically at systems that change, and the relation between changes and their subsequent effects. It is therefore appropriate to apply the concepts of chaos theory to the functional and organismic tourism destination system. The concepts within the theory do not necessitate a system having a purpose, or simply existing. Consequently the chaos theory offers important insight into tourism destination development not offered by the previously presented process of change theories.

2.6 Evaluation of the Four Theories in Relation to the Study of the Development of Tourism Destinations

This section is a two-part evaluation of the four process of change theories; Life-Cycle, Species Evolution, Punctuated Equilibrium, and Chaos Theory. Firstly, this analysis will highlight the concepts within each theory that are appropriate for understanding tourism destination development. For each concept, a brief description of its implications for understanding tourism destination change will be provided. Secondly, each theory will be considered on the basis of its ability to explain the type of change that occurs within the tourism system operating at a destination. This evaluation aims to increase the theoretical basis for understanding how and why change occurs in tourism destinations, and provide the basis for a composite model of tourism development, that will be presented in the final section of this chapter.

2.6.1 Concepts Offered by each Theory that are Relevant for Understanding Tourism Destination Development

As the development of tourism research is relatively recent, theories and models have been borrowed from various disciplines. Because of this, they have limited application when applied to tourism, as illustrated by the above discussion. It is the opinion of this author that this is the appropriate time to review the way tourism is studied and to develop a model which grows out of the complex issues within tourism, rather than attempting to fit tourism to a model developed for another discipline. In doing so the proposed model does not negate the value of the concepts presented in the above theories, but rather reorients the thinking, to develop a model that has tourism as its primary focus.

The analysis of the concepts from each four process of change theories are presented in Table 2.5 to Table 2.8. The first column reintroduces the main concepts from each theory that are appropriate for understanding tourism destination development. For each of the concepts, a brief description of its implications for understanding tourism destination change is provided, in the second column.

Some of these concepts and implications offer an explanation of the types of change that can occur in tourism destinations. Other concepts and implications provide a rationale for why change can occur in such varying ways. The concepts from each of the four theories all add to the level of understanding of tourism destination change. The picture generated from the combination of all of the concepts and implications provided the basis for the proposed model.

Table 2.5 Concepts and Implications of the Life-Cycle Theory.

Main Concepts	Implications
Tourism destination growth can be plotted over time to establish a description of the growth pattern for that destination.	<i>As this application has been extensively used, comparisons can be made between various tourism destinations.</i>
Destinations may follow an 'S-shaped' growth curve (Butler, 1980).	<i>This is a common growth pattern but variations are expected.</i>
Exploratory tourism often results in more Involvement, which then leads to Development (Butler, 1980).	<i>Understanding of the reasons WHY growth occurs will assist in explaining this process.</i>
A destination's life-cycle is the culmination of all the life-cycles of the individual companies and products offered.	<i>Each component of a tourism destination system and the external environment can affect the life-cycle of the destination.</i>

Main Concepts	Implications
The level of innovation decreases as a product progresses through the stages in the life-cycle (Utterback & Abernathy, 1975).	<i>Consequently, it is easier to be innovative during the early stages.</i>
The level of risk and uncertainty decreases through the life-cycle (Day, 1981).	<i>Risk-taking developers are initially involved in establishing a destination, which then allows lower risk companies to invest in the destinations growth.</i>
Product forms appear to have the closest approximation to the life-cycle model (Tellis & Crawford, 1981).	<i>Within one destination, life-cycles could be used for each form of tourism (e.g. exploratory tourism, mass tourism), with one tourism form growing as the previous form declines.</i>
Control moves from the local area to international 'experts' (Butler, 1980).	<i>Understanding how and when local control is lost can assist in its' future prevention.</i>

Table 2.6 Concepts and Implications of the Species Evolution Theory.

Main Concepts	Implications
The Species Evolution theory is a more appropriate model for the development of products in a free market economy, than the life-cycle model, which is based on an organism's life (Gross, 1968).	<i>Concepts within Species Evolution are likely to correspond better with tourism development, than those offered by the life-cycle theory.</i>
Biological terms have parallels in the business sector (Gross, 1968): <ul style="list-style-type: none"> ▪ Species ⇔ product ▪ Variation ⇔ product differences ▪ Environment ⇔ market place ▪ Survival ⇔ success/growth ▪ Overpopulation/overcapacity ⇔ excessive competition ▪ Survival of the fittest ⇔ struggle for existence 	<i>These terms provide a rationale for the activities conducted by tourism operators. This provides the basis for understanding WHY change occurs in the manner that it does.</i>
Biological survival strategies have equivalents (Gross, 1968): <ul style="list-style-type: none"> ▪ Specialisation ▪ Flexibility ▪ Adjustment to changing environment 	<i>These strategies provide a rationale for the activities conducted by tourism operators. This provides the basis for understanding WHY change occurs in the manner that it does.</i>
The focus is on gradual product change that is motivated by the three forces (Tellis & Crawford, 1981): <ul style="list-style-type: none"> ▪ Generative ⇔ managerial and entrepreneurial creativity ▪ Selective ⇔ the market, with consumers and competitors ▪ Mediative ⇔ government and other agencies 	<i>All three forces act together to create a tourism system within a destination. A difference in one of the forces could result in a different type of tourism system.</i>
There are five different patterns within evolutionary change that can occur multiple times and in any order (Tellis & Crawford, 1981): <ol style="list-style-type: none"> 1. Substantial divergence from a previous form 2. Adaption to the environment 3. Subgroup adapting to a niche 4. Stability 5. Extinction 	<i>This highlights that various types of evolutionary change could occur at any point during a destination's life. This model illustrates that there is not one growth process, like the Destination Life-Cycle Model, but instead numerous options created by varying combinations of the five patterns.</i>
The Species Evolutionary approach describes how gradual change can occur.	<i>This explains how change occurs during the equilibrium stage of 'Punctuated Equilibrium'.</i>

Table 2.7 Concepts and Implications of Punctuated Equilibrium.

Main Concepts	Implications
Conceptualising change as Punctuated Equilibrium establishes long term evolution as the culmination of change during equilibrium (evolution) and revolution.	<i>Combined with Species Evolution a composite theory can be developed which explains both the gradual change that occurs during equilibrium, and the dramatic punctuated change.</i>
Deep structure resists change. A punctuation only occurs if the deep structure is reconfigured (Gersick, 1991).	<i>This clarifies the significance difference between evolutionary change and a punctuation.</i>
A punctuation is caused by purposeful action from within the system or from the wider environment (Wollin, 1995).	<i>This assists in furthering understanding of how change occurs, rather than just focusing on the impact of the change.</i>
The interrelation between equilibrium and revolution is determined by the highly durable underlying order (Gersick, 1991).	<i>However what happens if no durable underlying order exists and the system continues to re-establish itself over and over?</i>
Systems of the same type do not always develop in a consistent direction (Gersick, 1991).	<i>It is therefore recognised that tourism destinations can develop differently.</i>
Growth can occur in an episodic pattern.	<i>This is supported by the empirical research conducted by Carter (2000; 2004) that illustrates dramatic episodic tourism growth.</i>

Table 2.8 Concepts and Implications of Chaos Theory.

Main Concepts	Implications
The Butterfly Effect : a small change can have significant effects (Prigogine & Stengers, 1984; Gleick, 1987; Vilkins, 1993; Russell, 2000).	<i>Provides a rationale for why one change affecting a tourism destination system can have huge ramifications.</i>
Bottom-Up Synthesis / Self-Organisation : a chaotic system can create its own order, which can appear turbulent on the surface, but is actually organised at the micro level (Prigogine & Stengers, 1984; Gleick, 1987; Briggs & Peat, 1989; Vilkins, 1993; Russell, 2000).	<i>Explains the establishment and development of a destination without any top-down control, or single organising agent.</i>
Lock-In Effect : elements within a system can possess the ability to withstand change, and thereby restrict change (Russell, 2000).	<i>Offers an explanation for long-standing aspects of a destination despite monumental change within the destination or competing destinations.</i>
Edge-Of-Chaos : a state that appears stable but is in fact ready to change radically (Prigogine & Stengers, 1984; Russell, 2000).	<i>Assists in explaining why change can suddenly occur unexpectedly.</i>
Bifurcations / Multiple choices / Chain Reaction : a selected direction limits possible options in the future (Prigogine & Stengers, 1984; Vilkins, 1993; Parry & Drost, 1995; Russell, 2000).	<i>Early decisions in a developing destination limit the type of future tourism. These initial decisions are therefore crucial in establishing appropriate tourism for a destination.</i>
Tornado Effect : an abrupt change in direction may not resemble a similar situation in the past, or in a current, similar system (Parry & Drost, 1995).	<i>The ability of a system to suddenly change direction provides the basis for the composite multi-trajectory model to be presented in the final section of this chapter.</i>

2.6.2 Characteristics of the Theories that are Appropriate for the Study of Tourism Destination Development

Both the linear (Life-Cycle and Species Evolution) and the non-linear (Punctuated Equilibrium and Chaos Theory) approaches offer tourism researchers useful models for understanding the development of tourism destinations. As the classical Newtonian paradigm is still the predominant scientific approach, linear models, particularly the life-cycle concept, have been used extensively to describe the processes of change in tourism destinations.

The Species Evolution theory is more complicated than the life-cycle concept but it is still inherently a linear model. Its application to tourism development has been limited despite incorporating a variety of non-sequential changes that eliminates a significant constraint of the life-cycle concept. Many of the applications of the life-cycle model have augmented the stages to fit the growth pattern of the destination under analysis. For example, Meyer-Arendt (1985) separated the development stage into three phases, when attempting to fit the life-cycle pattern to the Grand Isle, Louisiana, US. This variation could have been better explained by the non-sequential and repeatable stages of species evolution theory.

Linear models can be applied suitably to linear systems, which by definition have predictable action if information is known about the starting point and the operating rules (Ward, 1995). However they cannot incorporate all the complexity or dynamism of complex systems, such as tourism.

Each of the four theories possesses certain attributes, some of which are appropriate for the understanding how change occurs within the open and dynamic system operating within a tourism destination. Table 2.9 identifies attributes of each of the four theories on the processes of change. The shaded sections indicate attributes appropriate for the study of change within a tourism destination.

Table 2.9 Characteristics of the Four Process of Change Theories.
 The characteristics of each theory that relate to understanding tourism destination change. The shaded area indicates attributes appropriate for the study of tourism destination change
 * Indicates the characteristic is strongly addressed by the theory
 + Indicates the characteristic is partially addressed by the theory

ATTRIBUTES		THEORIES	Life Cycle	Species Evolution	Punctuated Equilibrium	Chaos Theory
Application Level	Destination		*	*	*	*
System Categories (Figure 2.4)	Structural					
	Functional		*	*	*	*
	Non-Purposive					*
	Purposive		*	*	*	*
	Mechanical		*			
	Organismic			*	*	*
Subdividing Theoretical Models	Descriptive		*	*	*	*
	Explanatory		+	+	+	*
	Predictive					
Approach to Change	Describes Change		*	*	*	*
	Explains Gradual			*	+	+
	Explains Radical			+	*	*
Role of Strategy	Self-Fulfilling		*			
	Agent of Change		+	*	*	*

From this analysis it is clear that all four theories can be applied at a destination level. Despite this, the level of understanding of tourism destination change provided by the theories varies, with no theory providing sufficient understanding of the true dynamics of the tourism destination system.

As discussed earlier (Section 2.3.2.2), a tourism destination system is considered to be a functional, purposive and organismic system. The four theories are all appropriate for the study of functional and purposive systems. However, life-cycle theory is more aligned with mechanical rather than organismic systems. This theory therefore does not incorporate the affect on the system if one element or connection changes or is removed. Tourism systems can be significantly affected by changing elements, both internal and external, as the system components are interrelated and interdependent. This may explain why many destinations do not follow the simple life-cycle growth pattern, as this theory does not fully address the

various change forces inherent in tourism destinations or the affect of the external environment on tourism growth.

All four theories are useful as descriptive models. They can all be applied for reviewing past growth in a tourism destination and describing some of the change that occurred. The theories also offer some level of explanation of the change, although the depth of this explanatory role varies. Concepts that developed from life-cycle theory explain why many aspects of a destination change throughout its life, including the product, tourist, developer, local control, resources utilised, and the level of innovation. Species evolution also offers some explanation of why the change occurs, correlating the reasons why biological change in species occurs, to the environment of tourism destinations and the forces that act on and within it. Punctuated equilibrium offers a significant explanation of why a particular type of change occurs, explaining why change can occur in a dramatic and sudden manner. This adds and explains the other type of change that is not addressed by the evolutionary life-cycle and species evolution theories. Chaos theory provides explanations for changes that are often considered variations or one-off situations by the application of the other three theories to tourism destinations. The concepts from chaos theory are particularly appropriate for understanding tourism destination change as they developed from analysis of complex phenomenon. Each of these four theories therefore offers explanations for different types of changes, which together can be used to build a more comprehensive explanation of tourism destination change.

While tourism destinations are not driven by the decisions made by one individual, or a collective united voice, the strategies undertaken by the various stakeholders can all affect the growth of the destination. The role of strategy as an agent of change is incorporated by the theories of species evolution, as the forces of change; punctuated equilibrium, as the triggers of revolutionary change; and chaos theory, in its concepts of the butterfly effect, self-organisation, and bifurcations. While life-cycle theory does consider the roles of developers and innovation, the stages and their related strategies can be self-fulfilling. If the strategies for a particular stage are implemented, then characteristics of that stage can be generated, thereby creating the pattern rather than allowing the pattern to occur, potentially in a different way.

2.6.3 Outcomes of the Analysis of the Four Process of Change Theories

The analysis of the four process of change theories considered the main concepts from each theory and their implications, which assist in understanding tourism destination change, as well as a review of the characteristics of each of the theories that are appropriate for the study of the complex system that operates as a tourism destination. There are a number of important outcomes of this analysis.

The first outcome is that all four theories include important concepts that are relevant for understanding tourism destination change, and have characteristics appropriate for the study of destinations. Secondly, all theories are applicable for describing change and can be applied at the destination level.

The most commonly applied theory to destination development, life-cycle theory, does not incorporate the complexity of the interrelating components within the organismic tourism system, or the opportunity to direct change, and ultimately affect the destination growth pattern. This theory describes change but only offers limited explanation of the reasons for the change occurring.

As a result there is a need to incorporate concepts from the other three theories into the understanding provided by the life-cycle theory. Concepts from species evolution describe gradual forms of change and concepts from punctuated equilibrium and chaos explain radical change. Combining the concepts from the four process of change theories will increase understanding of why change occurs, and how new directions for change can be developed.

2.7 The Multi-Trajectory Model of Tourism Destination Change

Analysing the four theories on the process of change resulted in two important conclusions. Firstly, change can occur in variety of ways and therefore result in multiple patterns.

Secondly, change can be unexpected, as it can occur at any time and may not follow a predicted path.

The first conclusion, that change can occur in a number of ways, is illustrated by the variation between the change patterns described in each of the four theories. Life-cycle theory predicts the classical S-shaped growth curve. Species evolution presents five types of change. These include introduction and elimination, as well as three other types of change which are evolutionary and occur in varying order and frequency between introduction and elimination. The punctuated equilibrium theory moves away from the evolutionary patterns of the previous two theories, to illustrate that change can occur in a sudden and dramatic manner. Finally, chaos theory assists in further explaining how and why these punctuated changes occur. Chaos theory thereby provides a rationale for why change can generate unpredictable patterns.

The second conclusion, that a change can be unexpected, is addressed by the two chaos theory concepts of 'edge-of-chaos' and the 'tornado effect'. The 'edge-of-chaos' concept explains why change can occur at any time, with unexpected, radical change occurring in a state that appeared stable. The 'tornado effect' illustrates that an abrupt change may not be in an expected direction. Change in the past, and in similar situations, does not always indicate what the new pattern of change will be.

Combining these two conclusions provides the basis for the components of a model for describing how change can occur within a tourism destination. A tourism destination is a dynamic system with multiple interrelated parts. Change to the destination system is dependant on the culmination of all the changes that occur to or because of the component parts. A detailed understanding of tourism destination change therefore requires analysis at both the system and sub-system levels. Consequently it was necessary that the proposed model therefore be parameter independent so this level of analysis could be undertaken.

In addition, a tourism destination can be defined at various geographical scales. For international travel a continent or country maybe the destination. Alternatively a state, region or local area may be considered a tourism destination. To ensure that analysis could be conducted at any, or all, of these levels, the proposed model also needed to operate at various scales.

The Multi-Trajectory Model of Tourism Destination Change (Figure 2.16), proposed as a hypothesis here, illustrates that at any given point in time destination change may occur in five significant ways. The first option (Line 1, in Figure 2.16) illustrates total equilibrium, where by the current growth level is maintained. The second option (Dotted lines 2,3,4) is also in an ‘equilibrium’ phase, but there is gradual evolutionary growth occurring. Thirdly (Line 5), the triggers of chaos are active, resulting in an episodic growth punctuation. The fourth option (Dotted lines 6,7,8) is the reverse of option two, with a gradual change resulting in negative growth. The final option (Line 9) is the opposite of option three, with the forces of chaos causing a dramatic negative punctuation in the growth pattern.

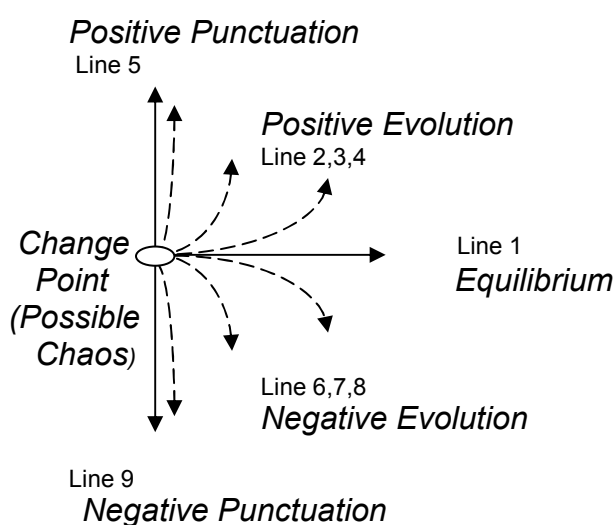


Figure 2.16 The Multi-Trajectory Model of Tourism Destination Change.

These types of changes can occur for any element of a tourism destination, or the destination itself, irrespective of the geographical level of the destination.

This Multi-Trajectory Model of Tourism Destination Change combines patterns from each of the four process of change theories presented in this chapter. During a destinations’ ‘life-cycle’ the growth pattern may at times be in a state of complete ‘equilibrium’, undergoing gradual positive or negative ‘evolutionary’ change, or within a ‘chaos’ induced ‘punctuation’ that is causing an immediate, and substantial increase or decrease in growth.

focused on one or a small number of aggregate growth variables. Such variables, while providing a general overview of growth, do not provide a detailed understanding of the change that has occurred. Analysis of sub-areas can illustrate where and when specific changes occurred and determine whether individual areas have followed the overall pattern of growth, or whether this pattern is in reality the culmination of a number of different growth patterns.

2.7.1.2 Research Issue Two - All Change Not Explained By Visitor Numbers

The second Research Issue states that: **all tourism destination change cannot be explained by total yearly visitor numbers alone.** In both the tourism industry and academia, tourism demand as illustrated by visitor nights and numbers has been used as a primary, or even single indicator of the level of tourism within a destination. As discussed earlier in this chapter, the application of the destination life-cycle model (Butler, 1980) to existing destinations often involved the use of data on total yearly visitor numbers in isolation. This was partially due to the lack of available tourism data collected with consistent methodologies and definitions over time and destinations. A more complete picture can now be developed as the number of tourism data variables collected and the time frame of this collection has expanded.

This second research issue has three sub-issues (Table 2.10). The first Sub-Issue considers that the total number of visitors is not representative of all the sub-categories and therefore does not show the underlying variation within these sub-categories.

Table 2.10 The Three Sub-Issues of Research Issue Two.

Research Issue Two	
Sub-Issue One	The total visitor numbers does not show the underlying variation of sub-categories
Sub-Issue Two	Yearly data obscures seasonal variation
Sub-Issue Three	Other data needs to be analysed alongside visitor numbers to determine the effect of changing trends

Total visitor numbers or visitor nights are an aggregation of all types of visitors. As an overall measure of tourism change, this measurement fails to illustrate the underlying change, complexity, and variation that may exist within sub-classifications. This overall measurement can be broken down in a variety of ways, such as origin of the visitors, type of accommodation utilised, reason for travel, or product markets.

An increase in the total number of visitors does not necessarily mean that all the sub-categories increased, as domestic visitation may have risen while international visitation fell, or numbers travelling for holiday/leisure may have increased while business travel decreased, or the number staying in hotels may have grown while numbers in caravan parks may have dropped. Such underlying changes may be very significant for certain businesses which cater to these sub-category visitors, such as inbound operators, conference facilities, or caravan parks. This Sub-Issue further supports Research Issue One, as total visitor numbers is an aggregation of the sub-categories.

The second Sub-Issue considers the use of yearly visitor numbers, as total visitor measurements are often presented as a yearly total. This obscures the seasonal variation of visitation that is inherent in the tourism industry and has significant impact on tourism destinations. Tourist destinations often experience dramatic jumps and subsequent drops in visitation depending on the season. This results in widely fluctuation occupancy levels for accommodation providers and tour operators, as well as patronage levels for shops, and food and beverage establishments.

An analysis of the seasonal variation in occupancy also provides an understanding of the relation between the supply of accommodation and the demand by visitors. This establishes whether there is an actual need for additional accommodation and assists in determining the potential profitability of any new accommodation.

The third Sub-Issue proposed that other tourism-related data variables need to be analysed alongside visitor numbers in order to determine the effect of changing trends on a tourism destination. The pattern of visitation is not necessarily 'the' pattern of change for the destination, as other variables may demonstrate alternate change patterns. For example, some variables, including the length of stay of the visitors and their expenditure level have significant impacts, such as on yield. In addition, the trend in occupancy is the combination

of the forces of both supply and demand. These factors and their effects cannot be determined by visitor numbers alone.

2.7.1.3 Research Issue Three - No Predetermined Pattern

The third Research Issue states that: **there is no predetermined pattern of tourism destination change**. Instead of the expectation that a destination will probably progress sequentially through the stages of the destination life-cycle, this Multi-Trajectory Model of Tourism Destination Change illustrates that at any given time during its life, a destination may ‘change’ to follow any one of the five trajectory options.

The outcome of this proposition is that the pattern of change in a tourism-related data variable can exhibit any one of the five trajectories followed by a change to one of the other four. This process can then be repeated over and over. The pattern of each data variable over time would therefore be a combination of up to the five different trajectories occurring in any order.

Within this Research Issue there are three Sub-Issues (Table 2.11) which relate to the pattern of change in destination data variables, as proposed in the Multi-Trajectory Model of Tourism Destination Change.

The first Sub-Issue states that: tourism-related data variables exhibit different patterns. If there is no predetermined pattern, then tourism-related data variables will exhibit different patterns over time.

Table 2.11 The Three Sub-Issues of Research Issue Three.

Research Issue Three	
Sub-Issue One	Tourism-related data variables exhibit different patterns
Sub-Issue Two	The last stage does not predict the next stage
Sub-Issue Three	Trajectory lengths are not predetermined

With respect to the Multi-Trajectory Model of Tourism Destination Change, the pattern of a tourism-related data variable may not exhibit all five trajectory options during a particular time period. The pattern of a variable may be a single trajectory or a combination of a number of trajectories. Possible patterns include:

- The pattern shown by a data variable could be a single trajectory which occurs continually over the time period analysed. The variable may be experiencing a period of 'positive evolutionary' change or 'relative equilibrium'.
- The pattern exhibited by another data variable may incorporate only gradual types of change, fluctuating between periods of positive and negative 'evolutionary' change.
- Another alternative may be a data variable that increases in dramatic way. This would generate periods of 'relative equilibrium' interspersed with 'positive punctuations'. This variable would therefore be exhibiting the standard Punctuated Equilibrium pattern.
- A different variable may combine 'evolutionary' and 'punctuated' change trajectories. For instance, growth may occur in a gradual manner, with decline occurring as a dramatic decrease.

Different tourism-related variables within a destination may exhibit very different patterns during the same time frame. Therefore the pattern of change displayed by a tourism destination is ultimately dependant on the variable(s) considered. Focusing on total visitor numbers may portray a different type of growth to the analysis of visitors from intrastate, interstate, or overseas, or the type of accommodation provided.

However, this does not imply that all tourism-related time-series data will not illustrate any corresponding trajectories or change points. For instance there is an obvious relationship between the number of establishments and the capacity in a particular accommodation sector.

The second Sub-Issue states that: the current trajectory does not have a predetermined life. If there is no set pattern for tourism destination development, one trajectory option does not last for a preset period of time. The internal and external forces operating on a specific tourism destination system are different to both other destination systems and the past forces that acted upon the destination. This results in a lack of order in stage progression, and instead, an individualised length for each trajectory.

The third Sub-Issue states that: the last stage does not predict the next. This Sub-Issue follows on from the first Sub-Issue, which stated that there is no set pattern for tourism destination development. If the pattern of change in the period analysed can be any one of the trajectories of the Multi-Trajectory Model of Tourism Destination Change, or a combination of these options, then one stage does not automatically follow another. Any of the trajectory options may occur after the current pattern. In addition, certain trajectories may take place multiple times during the life of a destination and others may never occur.

2.8 Redefining the Research Aim and Questions

Chapter One presented the preliminary research aim posed as the basis for the study as: **to understand how and why change occurs within a tourism destination.**

The review of the literature on the four process of change theories illustrates the applicability of concepts from each model for the study of tourism destination development (Research Question One). Applying the knowledge accrued through this literature review adds depth to the opening research aim. The research aim can therefore be reconsidered as: **to determine whether tourism destination change occurs as a combination of equilibrium, gradual evolutionary changes, and dramatic punctuations caused by the agents of chaos.**

The concepts from each of the change theories form the basis of the multi-trajectory composite model presented in the previous section (Research Question Two). Testing the implications is therefore a test of the research model, based on the aim of the research.

The research aim above is considering the types of change that occurs within tourism destinations. Conceptually, the question proposes that destination change is positively affected by equilibrium periods, evolutionary types of change, and punctuated change caused by chaos factors (Figure 2.18).

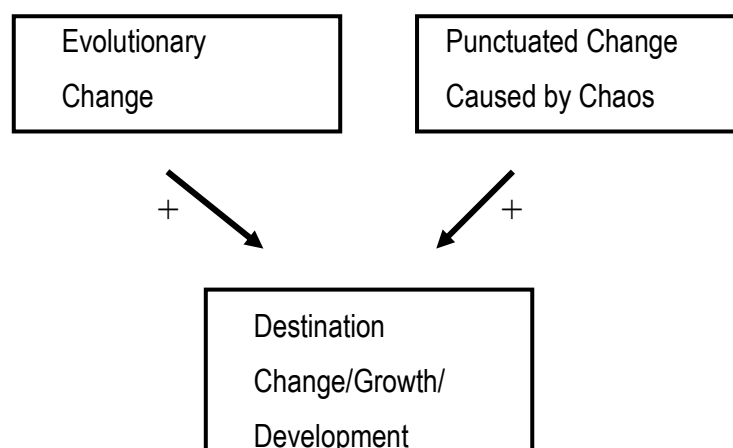


Figure 2.18 Conceptualising the Research Aim.

As mentioned earlier in this section, the Multi-Trajectory Model of Tourism Destination Change incorporates patterns from each of the process of change theories presented in this chapter, thereby combining evolutionary change with punctuations and chaos factors. This leads to the fourth research question, as to whether the model is an appropriate assessment and combination of the concepts offered by the change theories, and is the model able to assist in explaining and understanding the change that occurs during the development of a tourism destination. In order to assess the applicability of this proposed model for understanding tourism destination growth and its potential to assist in tourism destination planning, Chapters Four and Five will present the empirical study of the case study system (Research Question Four). This research will consider how the destinations at the different levels of the tourism system have changed. Where possible the causes of this change will be discussed. In addition the similarities and differences between the variables at the different levels will be analysed.

To ensure understanding of the case tourism system analysis, Chapter Three outlines the methodological basis for the study, the type of case study research conducted, and the process involved in selecting the case system. Chapter Four will then provide a historical context for the data presented in Chapter Five.

The development of the Multi-Trajectory Model of Tourism Destination Change and the resultant Research Issues builds on the three theses and Research Questions identified in Chapter One (Figure 2.19).

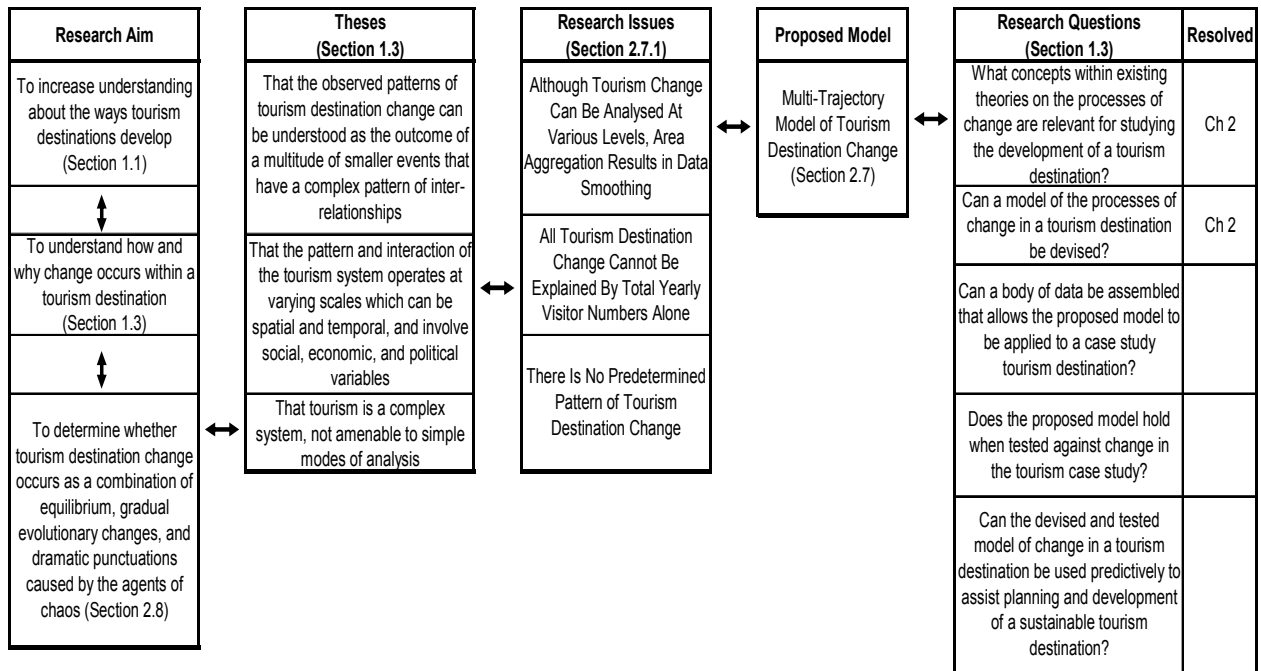


Figure 2.19 The Relationship between the Proposed Model and its resultant Research Issues, and the Theses and Research Questions developed in Chapter One. (Developed from Figure 1.3)

Chapter 3 The Research Process

3.1 Overview of Chapter Three

This chapter describes the methodology used for this study. As the research purpose should determine the research design and methods (Simon, 1969; Patton, 1990; Bryman, 1992) there is no one ideal design for conducting research (Simon, 1969; Patton, 1990). Patton (1990) defines five alternative purposes for research: basic research, applied research, summative evaluation, formative evaluation, and action research. This study is considered basic research as it seeks to contribute to fundamental knowledge and theory. This is achieved through the development (Section 2.7) and testing (Chapters 4 and 5) of the proposed model to further understanding of the phenomenon of tourism destination development.

Each stage of the methodology of this study is determined by the requirements of the study's research aim and questions. The overall process is presented diagrammatically in Figure 3.1. This sets out the purpose of the research, incorporating the problem, aim, and questions from Chapter One, the development of the proposed model from Chapter Two, and the 'core elements' of the research process (Blaikie, 2000).

For each of the core elements there are a number of research options available. Selection of a particular option is determined by the research purpose. The research options selected for this study are discussed and justified in this chapter.

The research framework selected for this study is the Integrative Systems Model of Tourism Theory and Planning (Getz, 1986). This research framework will be presented and its impact on this study discussed in the first section of this chapter. The research design chosen for this work is a case study approach. The justification of this selection, the type of case study research utilised, and the process of selecting a case study is discussed in section two. Data related aspects of the research process are addressed in section three, including a discussion of the use of both qualitative and quantitative secondary data, the sources of this data, and the methods of data collection and analysis.

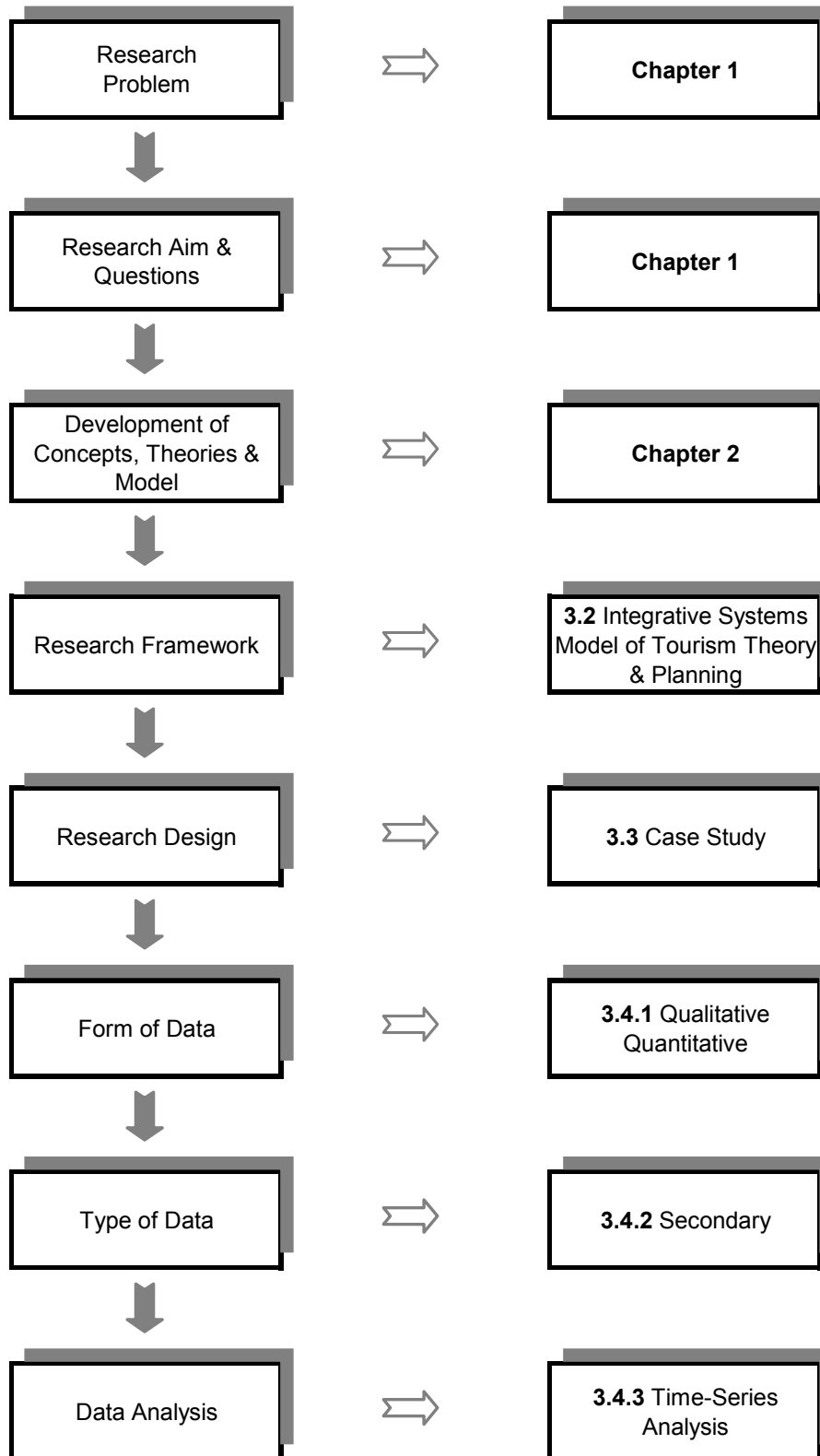


Figure 3.1 The Stages of the Research Process. Research Stages {after Blaike (2000)} and the Research Options Selected for this Study.

3.2 The Research Framework

Consistent with the use of a systems approach (Chapter Two), this work is based within the framework of the Integrative Systems Model of Tourism Theory and Planning (Getz, 1986). This model (Figure 3.2) is a tourism application of Chadwick’s (1971) Model of Systemic Planning. Chadwick (1971) perceived the planning process as involving two directions of enquiry which occur in parallel with each other. A focus of this conceptual planning system is to understand the tourism system itself, its dimensions, and the relations between its components (Getz, 1986).

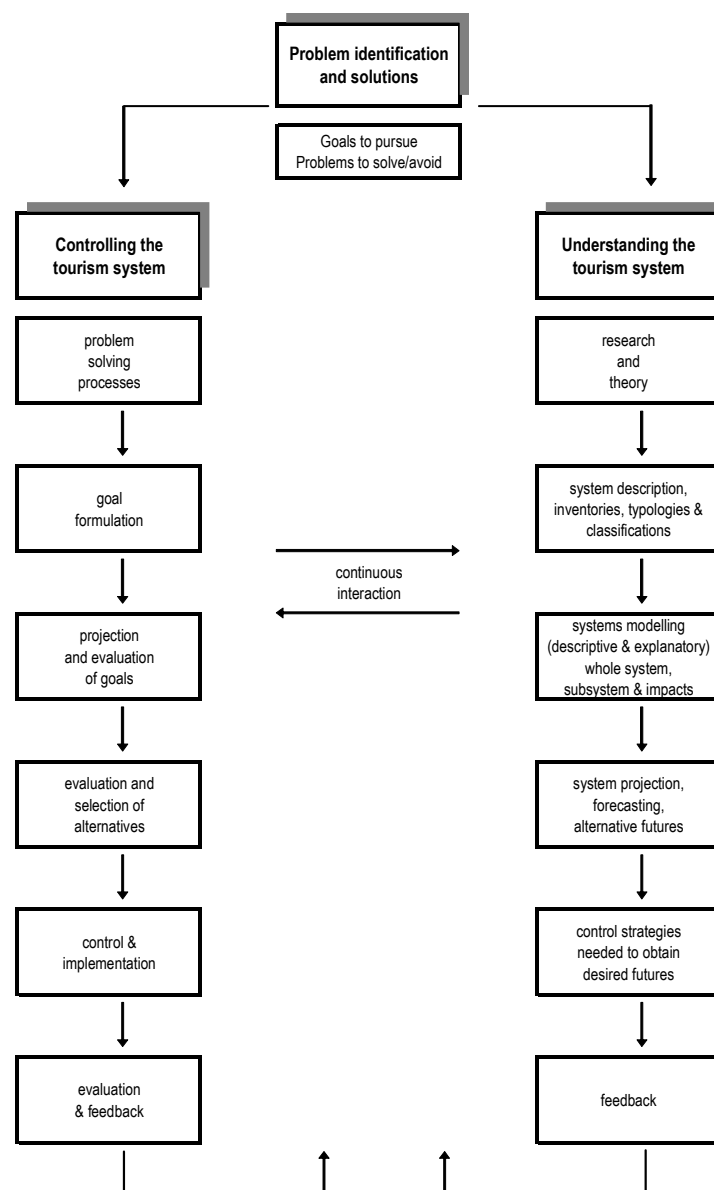


Figure 3.2 The Research Model used for this Work. The Integrative Systems Model of Tourism Theory and Planning (Getz, 1986), a Tourism Application of Chadwick’s (1971) Model of Systemic Planning.

The first step of the Integrative Systems Model is 'Understanding the Tourism System' through a combination of 'research and theory' (Getz, 1986). As the aim of this study is to understand the system that evolves at a tourism destination it is appropriate to use a two-stage process that incorporates existing theory and empirical research. The first stage of reviewing existing theory, presented in Chapter Two, considered various theories on the process of change, that have been used to describe tourism destination development and its causes. Concepts from each of these theories were then incorporated into a composite model of tourism destination change. The second stage of empirical research is presented in Chapters Four and Five. This research is conducted to test the proposed model against the tourism destination development in the selected case.

The Integrative Systems Model of Tourism Theory and Planning aims to elicit conclusions regarding the way that a tourism system could be controlled, and strategies for achieving the planned goals (Getz, 1986). By aiming to increase understanding of how and why development of a tourism system occurs in a destination this work intends to assist in this process and provide the basis for further integrative tourism planning.

3.3 The Research Design

Having determined the overall aim and intention of this work and placed it within an existing tourism planning model, the next decision became the selection of a research design that would guide the empirical study. The research design is the 'logic of enquiry' used for research and therefore defines the steps used to answer the research questions (Blaikie, 2000). The strategy chosen was case study research.

This section outlines the methodology of case study research, the reasons for its usage in this study, and the process involved in selecting the case tourism system of destinations. The case study approach chosen for this work is an instrumental, longitudinal comparative approach to a case study system that incorporates a number of tourism destination sites at various geographical levels. The outcome of the case selection process was the use of a case that consists of the multi-level tourism system that incorporates the tourism destinations of the three local areas of Noosa, Maroochy, and Caloundra, the Sunshine Coast region they comprise, the State of Queensland, and the Nation of Australia.

Social science researchers have a number of research designs available (Table 3.1). The main options are experiment, survey, archival analysis, history, and case study (Yin, 1989). The research design is primarily determined by the research question, its type/form, whether control is required, and whether the study is historical or contemporary.

Table 3.1 Research Design Options.

The research design for a social science study is determined by the type of research question (Yin 1989). For this study a case study approach is appropriate as the research question fits the how, why, and what category, does not require control over events, and focuses on understanding a current phenomenon.

Strategy	Form of Research Question	Requires Control Over Behavioural Events?	Focuses on Contemporary Issues
Experiment	how, why	Yes	Yes
Survey	who, what, where, how many, how much	No	Yes
Archival Analysis (e.g. economic study)	who, what, where, how many, how much	No	Yes/No
History	how, why	No	No
Case Study	how, why	No	Yes

The case study research design is appropriate for how and why questions that do not require control over events. The case study approach is therefore applicable for research aiming to increase understanding of how and why tourism destinations develop and change. Additionally control over the case would be both impossible and undesirable.

3.3.1 Case Study Research

Case study research is extensively used in the fields of law, education, history, business, medicine, and psychology (Van Maanen et al., 1993). It can be considered the preferred alternative to the impossibility of control experiments (Carter, 2000). The case study approach can be utilised in any discipline which involves the study of complex and unstructured problems (Easton, 1992).

Ultimately all studies of a social phenomenon are case studies, with specified time and place boundaries (Van Maanen, 1998). The term ‘case study’ can be used to refer to the methodological choice, the method of inquiry, the object selected for study, the process of

learning about a case, as well as the ultimate product of the inquiry (Stake, 1994). Additionally a case study can be an account of the current management situation (Bonoma, 1985). In relation to the development of a tourism destination, the case study may be an account of the lack of overall management of change.

Instead of questioning ‘what is a case?’, the focus should be ‘what is this case about?’ (Van Maanen, 1998). Each case is “particularistic, descriptive, heuristic, and inductive” (Merriam, 1988 p.11). Specifically, within the social sciences, a case is considered to be a unique, bounded, purposive, integrated, specific system, with functioning parts and patterned behaviour (Stake, 1994). Studying a tourism system within a destination is studying a case. Additionally, case study inquiry is an appropriate research method if the study is of a phenomenon that cannot be easily separated from its context, and when the aim is to identify casual relationships within the system and the wider environment (Yin, 1993, 2003). As the aim of this study is to identify the types of change/growth that occur during tourism destination development, a case study approach can be utilised.

Case study research methodology does not have a specific, clarified framework. This limitation may be partially due to the extensive range of fields in which it is used. It has been claimed (Carter, 2000) that case studies, as research tools, lack rigor, and the results and conclusions cannot justify scientific generalisation. However, case studies offer the opportunity for developing and testing theory. As a result the context for the case study is a vital part of the process and needs to be included in the resultant ‘case study’ (Carter, 2000). The epistemological question of case study inquiry is ‘what can be learned from the single case?’ (Stake, 1994).

Case study research can be classified within three distinct types: intrinsic, instrumental, and collective (Stake, 1994). Intrinsic case study research is used to study a single case to further information on that particular case. This can be clearly differentiated from using one case to understand other cases. Application of the instrumental case study approach requires the case to be selected and investigated to support and refine a theory. A collective case study is an inquiry into a number of cases. It can be considered as an instrumental case study of multiple cases, not the study of a collective. For an instrumental or collective case study research the cases are selected on the basis that understanding them will further understanding of a phenomenon, a population of cases, or a general condition (Stake, 1994).

This study incorporates an instrumental case study research approach as it is an inquiry into a case destination system. This type of case study is appropriate as the purpose of the study is to build theory and understanding of the generic phenomenon of tourism destination development.

Bouma (2000) outlines the basic types of case study research designs, which are defined by the question posed by the study: simple, longitudinal, comparison, and longitudinal comparison. A simple case study research design is appropriate when the aim is to understand ‘what is going on?’ and to establish whether there is a relationship between two variables within the case. A longitudinal case study considers change over time. For example the focus may be on whether or not the relationship between two variables within the case is the same at two different points in time. The comparative case study incorporates two or more similar cases, and assesses whether the variables and the relations between them are the same for each of the cases researched. Longitudinal, comparative research considers the overall change in the cases over time, as well as change to the variables within the cases, and the relationships between these variables (Bouma, 2000). In this research I am aiming to test whether the changes in the selected case study are able to be explained by the Multi-Trajectory Model of Tourism Destination Change which incorporates overall destination development as well as change to variables and their relations, within the different levels of the system. This work investigates one case, with the application of a longitudinal, comparative approach to the various destination levels of the case system.

Case studies providing multiple evidences for empirical investigation (Robson, 1993) reduces, but does not eliminate, the risk of bias (Yin, 1994). A case can be thought of as one amongst others. The case study simply focuses on the one, even though the true interest may be in a phenomenon or a population of cases, rather than the single case (Stake, 1994).

In this study I have focused primarily on multiple sets of quantitative data, with supporting contextual qualitative information. This is in contrast to cases where significant qualitative data is mixed with limited quantitative data. While some of the quantitative data may be confounded, in most cases it represents an undisputed, objective measure of a relevant variable over time and at a particular level. Although there are some limitations regarding data time span and collection, the diversity of data allows the construction of a case study of greater complexity and data density than is normally the case.

In summary, research utilising case studies requires four main elements:

1. investigation is on contemporary phenomenon within their real-life context, when
2. boundaries between phenomenon and context are not clearly evident;
3. multiple sources of evidence are used (needed); and
4. research is part of a comprehensive research strategy, not just a data collection tactic or a design feature (Yin, 1989, 1994).

These four elements are evident in this research. The data was collected from numerous sources, and is used to establish the applicability of the proposed model, which aims to increase understanding of the phenomenon of tourism, a relatively new field of research, that operates within the wider social, cultural, economic, political, and environmental context.

3.3.2 Case Study Selection

The object of this study is to understand the change that occurs during tourism destination development. The selection of the case was itself an evolutionary process to ensure the tourism destination(s) chosen provided the opportunity to test the proposed model and its implications. This process passed through a number of phases of selection criteria and possible destinations before the final tourism case system of destinations was decided upon. The remainder of this section outlines this process.

The underlying rationale for this study is my interest in the appropriate management of natural attractions that become a focus for tourism, and as a result require protection and tourism planning to ensure sustainability. Consequently the focus was initially on both the early stages of tourism destination growth and the use of destinations primarily based on natural attractions. Testing the proposed model required historical data to identify changes in the level of tourism which result in inflection points as one trajectory is replaced by another. Therefore the initial criteria for destination selection were the existence of change point(s), past/present change, historical information, and natural attributes. The locations considered during this phase included Kakadu, the Kimberlies, and destinations funded through the international ecotourism society. However the 'history' of a newly emerging tourism destination is limited, both in terms of the short time frame, and available statistical

data. It became apparent that the required cases needed to be existing, established destinations.

The selection criteria were therefore reviewed and additional criteria considered. This resulted in an expansion of the criteria to include destinations that had developed significantly over the last 30 years, experienced a four to ten fold growth in visitation in the past ten years, exhibited periods of smooth growth and/or staggered growth, incorporated either keystone events or no apparent keystone events, and measurable changes in visitors and other development indicators. A consideration at this time was whether to select destinations that had already been described using Butler's (1980) life-cycle model.

This developed into a detailed set of selection criteria and possible cases (Table 3.2). The criteria included aspects that were considered necessary for all destinations, such as natural attraction(s) and background information, and conditions that could vary across the selected cases, including the level and type of development, and whether the destination had been studied before. During this phase numerous destinations were being considered, with the main eleven possibilities presented in the table.

Consideration was also given to the possibility of incorporating a number of locations at different stages of tourism development. A conceptual model of the stages of growth needed to be developed to provide a rationale for selecting destinations or potential destinations at each of the stages. This Model of Developing Tourism Destination Systems is presented in Figure 3.3. Prior to tourism development, a location may be considered either overtly or covertly as a potential destination. This period is termed the 'Pre-Tourism System' (Figure 3.3). If tourism, or a tourism enterprise, is deemed feasible the destination progresses into the 'Tourism System I' phase where the aim is to attract tourists, and often results in attracting investment and a need to manage the resources. This stage of development may decline or flourish into a 'Tourism System II'. At such time decisions about the future type of tourism are made, whether as informed tourism planning, or as unregulated, individual/corporate resolutions. Depending on these decisions the destination will experience one of the change trajectories described in the proposed model developed in Chapter Two. This results in a 'Tourism System III', which can take numerous forms depending on the development trajectory that occurs.

Table 3.2 Case Study Selection Criteria.
The selection criteria developed during the case selection process, and the possible cases which were considered against the criteria.

SELECTION CRITERIA	POSSIBLE CASES										
	Port Douglas	Whitsundays	Gold Coast	Kakadu	Ayers Rock	West Kimberlies	Byron Bay	Arctic/Antarctica	Fiji	Ecotourism Society Funded Project	Petra
ACCESS (Required)											
Physical	✓	✓	✓	✓	✓	✓	✓		✓	✓	
Background Information	✓	✓	✓	✓	✓			✓	✓		
Contacts	✓✓	✓✓	✓	✓✓	✓✓	✓✓	✓✓		✓	✓	
GENERAL (Required)											
Natural Attractions/Component	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	
Developed Over Last 20 Years	✓	✓		✓	✓	✓	✓	✓		✓	✓
Growth Level (4-10 X)	✓	✓		✓	✓	✓	✓		✓		
LEVEL OF DEVELOPMENT (Variation)											
Minimal: e.g. tourists using local facilities						✓		✓			
Developing: e.g. local accommodation										✓	
Developed: e.g. early mass tourism	✓	✓	✓	✓	✓		✓		✓		✓
TYPE OF DEVELOPMENT (Variation)											
Generally Smooth											
Staggared	✓	✓	✓	✓		✓	✓	✓		✓	✓
Keystone Events	✓			✓	✓			✓	✓	✓	
OTHER (Variation)											
Previously Studied			✓					✓	✓		
Multiple Stakeholders	✓	✓	✓	✓✓	✓	✓	✓		✓	✓	✓
Significant External Events			✓		✓			✓	✓	✓	

While still incorporating the natural attraction component, a selection criteria was developed on the basis of the Model of Developing Tourism Destination Systems (Figure 3.3). This would include six case study destinations; two locations where tourism is being considered (Pre-Tourism System), such as Lawn Hill and Lakefield National Parks, two destinations where there is commercial tourism (Tourism System I), such as the Kimberlies, and two destinations where tourism is established (Tourism System II), such as Kakadu, Broome, and/or the Daintree.

Although this phase of the case study selection process appeared to be the ideal basis for selection there is a significant lack of data on locations at the Pre-Tourism System and Tourism System I stages, and where destinations are established (Tourism System II) data is frequently collected at the regional rather than the local level. Consequently, for practical reasons it became necessary to select destinations that are established tourism regions, with defined boundaries used in the collection of long-term time-series statistical data.

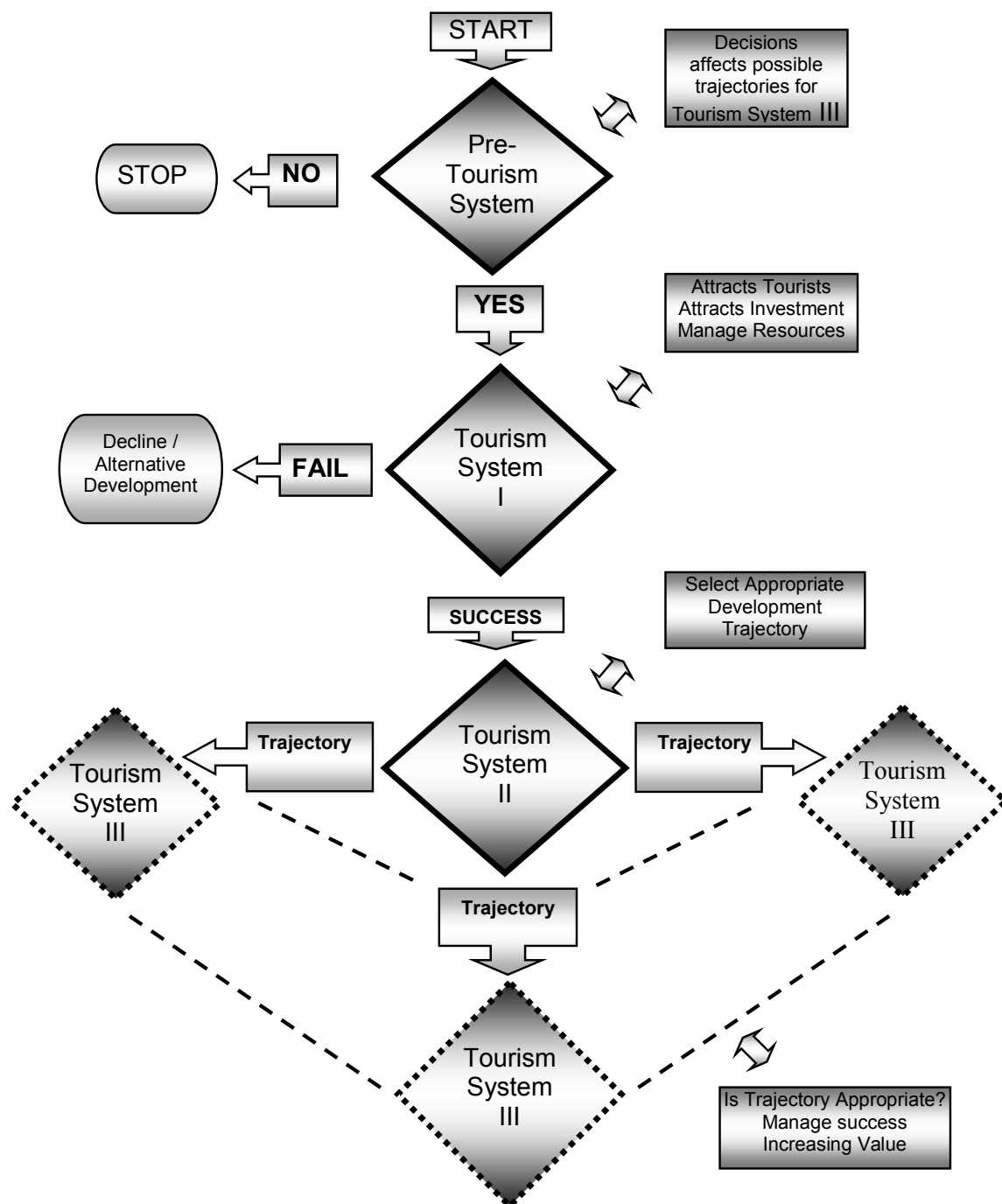


Figure 3.3 Model of Developing Tourism Destination Systems.
 This model was developed to assist in the selection of appropriate case study destination(s) for this study.

In addition to the issue of the stage of development, the consideration of local or regional destinations, particularly in Queensland, highlighted the various geographical levels of tourism destinations. The higher aggregate levels, such as the Nation of Australia or the State of Queensland, could provide information on the environment in which with a lower level destination operates and develops. This would involve both the qualitative and

quantitative aspects of the research as regional destinations evolve within the context of State and National development, and statistical data collected at the regional destination level is also available at the more aggregate levels.

By selecting a regional tourism destination in Queensland as the case study, it was realised that it would be possible to compare the same variable at the three levels, determining whether or not the region followed the patterns of change evident at the National and/or State levels. If the pattern was followed, it could then be determined whether it was significant at the regional level, and if the impact was immediate or delayed.

Although the regional destination level was selected partially because of data availability, the initial investigation of the available quantitative data in Queensland highlighted the availability of some sub-regional data. For many of the data variables being investigated local level data was available, although not necessarily for the same length of time. The use of local areas was considered important for this work, as it provided the opportunity to investigate and compare the local level destinations. This would determine whether tourism developed in similar ways and at similar times across the local areas, and whether external influences had similar impacts on the local level destinations or whether the responses differed. Change in variables could be assessed to determine whether it was common across the National, State, regional, and local areas.

The Sunshine Coast destination with its three clear sub-regions, the Shires of Noosa and Maroochy and the City of Caloundra was finally selected as the case study destination for this work.

The Sunshine Coast destination region and its sub-regions are all located in Queensland. Therefore the National and State regulations have been consistent for each over time, all are potentially affected by large-scale external events, and the data collected at the different levels across the State are comparable. In addition the three local areas comprise a coastal and hinterland area. This similar natural environment and the attraction of the beach provided a basis for the original establishment of tourism in each area. Despite these similarities the development of each occurred in relative isolation, with varying periods and types of change, and ultimately differing images, although all have been marketed as part of the Sunshine Coast region since 1962.

The case study being investigated is therefore a tourism system that is comprised of the National and State levels, the region of the Sunshine Coast, and its three sub-regions of Noosa, Maroochy, and Caloundra.

According to Wober (2000) two issues arise when analysing case study data: availability and comparability. Selecting tourism destinations that are all located in Queensland/Australia results in consistent methodologies which allow for comparison across the different levels. Finally various sources of data are available on these destinations and many are accessible.

3.4 Data Selection and Analysis

This section outlines the data required for the empirical work, the sources used, the data collection requirements, and the methods used to analyse the data. This research uses secondary qualitative and quantitative data. The qualitative information, presented in the following chapter, provides the context and reasoning for the quantitative statistics analysed in Chapter Five. These statistics are predominately time-series data that have been collected by various governments departments and agencies, on numerous variables, including both specific tourism attributes and other general indicators of change. The aim of this study and nature of the quantitative data make time-series analysis appropriate. This method considers the overall trend, seasonal variation, and the remaining fluctuations.

The data wherever possible has been collected over the same time period, for the three local areas, the Sunshine Coast region, the State of Queensland, and the National level. This allows for comparative analysis to establish the similarities and differences between the types of change that occurred at the various levels of the system, as well as across the three local levels. This also provides the opportunity to identify the resultant impact of external influences at various levels of this tourism system.

3.4.1 Multi-Method Approach - Qualitative and Quantitative

Tourism researchers have the opportunity to choose from a wide range of tools and techniques from various disciplines to study tourism (Smith, S. L. J., 1995). To select methods appropriate for studying tourism requires the acknowledgment that there is a tradeoff between the various methods, and the need to select the option that can be most suitably applied (Walle, 1997). Research into how a destination develops and why it changes in the way it does requires a multi-method approach incorporating both qualitative and quantitative elements. This multi-method technique has been selected as the appropriate approach to address the aim of this study. Change in a destination can be measured using quantitative techniques, but understanding the underlying reasons for the change requires a qualitative approach.

Although the case study approach does not define the data required or the collection and analysis methods (Goode & Hart, 1952), various methods for collecting information and making observations are usually necessary for the in-depth investigation of a case study (Hamel et al., 1993). This results in a number of methods, types of data, sources of information, and treatment of empirical material. Additionally case study based research can involve qualitative and/or quantitative data (Yin, 1989, 1993; Stake, 1994; Van Maanen, 1998; Yin, 2003). The multiple data, from different sources, may be collected and analysed by various methods and the 'case study' provides a way of organising the data to understand the phenomenon under investigation (Goode & Hart, 1952).

Qualitative and quantitative methods are generally accepted as effective and justifiable, despite the fact that these approaches tend to exist separate from one another (Walle, 1997). This independency is the result of both types of research being classified under alternate paradigms (Brannen, 1992). More recently, the two approaches have become regarded as complementary (Veal, 1997). Qualitative and quantitative methods have different strengths and weaknesses (Patton, 1990). As the main 'trade-off' between quantitative and qualitative inquiries is really a trade-off between breadth and depth (Patton, 1990), a multi-method approach can ensure there is a certain level of breadth and depth.

The qualitative/quantitative distinction can be considered at the paradigm or method level (Brannen, 1992). For this study qualitative and quantitative refers to the type of data

required and the methods of data collection and analysis. Multiple methods can be incorporated into one study in numerous ways (Miller & Crabtree, 2000), with both qualitative and quantitative data collected in the same study (Patton, 1990). Bryman (1992) identified six ways that qualitative and quantitative research can be combined. The arrangement used for this study is 'qualitative research that facilitates quantitative research'. This involves the incorporation of qualitative research to provide 'background information on context' (Bryman, 1992). As Gunn (1994 p.5) states "the nature of the information needed should be emphasized, and then every principle, technique, and method most appropriate for resolving that need should be tapped".

The use of a quantitative method for tourism research is appropriate when the questions posed can be suitably and conveniently analysed by these techniques. Such a method also necessitates that adequate, rigorous data can be collected (Walle, 1997). The main advantages of this scientific method are the methodological exactness of the techniques and the expression of the output is in a quantifiable form. The tradeoff is that some research issues may not be able to be addressed as the method is not an appropriate method of inquiry for all issues (Walle, 1997). Quantitative research involves the identification and definition of variables and variable categories (Brannen, 1992). This study uses quantitative measurements of the change in numerous variables. Sources of quantitative data are natural social settings, semi-natural settings, artificial settings, and social artifacts. Types of social artifacts include official statistics, public documents, private documents, and personal records (Blaikie, 2000). The researcher "looks through a narrow lens at a specified set of variables" (Brannen, 1992). This illustrates why the qualitative context is vital in ensuring that the quantitative data is placed in the 'big picture'.

When the aim is to unearth relationships and/or patterns within the phenomenon under investigation, description should ideally occur in conjunction with another research objective (Smith, S. L. J., 1995). As this study seeks to understand tourism destination change, qualitative data is used descriptively to understand why the change observed in the quantitative data has occurred. The provision of the context of an evaluation is necessary as it limits the possible interpretations and provides an explanation of divergent evaluative data (Smith, N. L., 1995). Qualitative data collection methods include interviews, direct observation, personal experience, and the analysis of artifacts, documents, cultural records, and visual materials (Patton, 1990; Denzin & Lincoln, 2000; Miller & Crabtree, 2000).

Document analysis in qualitative inquiry includes excerpts, quotations, entire passages from organisational, clinical, or program records, personal diaries, and open-ended written responses to questionnaires (Patton, 1990). For this study written accounts of both tourism destination development and changes in the wider social, political, and economic systems are used to provide understanding of the historical development that occurred. This includes significant people, events, changes to regulations, and external influences.

3.4.2 Secondary Data

The terms secondary information and secondary data are used to describe empirical information that has been collected by others (Stewart, 1984). It is collected either for a general purpose, such as a national census, or for a particular research project (Blaikie, 2000). Large-scale surveys are particularly applicable for secondary analysis (Blaikie, 2000). Main sources of secondary data include government reports, industry or collective studies, journals, and books (Stewart, 1984).

The primary advantages of secondary data over primary data are generally the lower costs involved, the reduction in time needed to collect data, and the availability of routine data on past situations. However the corresponding disadvantages are that usually the research aim differs, the study is based upon different assumptions, certain issues may not have been addressed, the manner of the questioning may not be suitable, and aggregation may result in an unsuitable level of detail. Additionally it may be difficult to determine the quality of the data as the primary research may be bias, the research design flawed, or the conclusions produced unsound (Stewart, 1984; Smith, S. L. J., 1995; Blaikie, 2000).

Another disadvantage often associated with secondary data is its relevance as it may be 'old' (Stewart, 1984). This does not usually pose a problem for historical, comparative, or theoretical research (Blaikie, 2000). Due to the purpose of this study, this aspect of secondary data is not a disadvantage. In fact the further back in time the data series extends the greater the potential understanding of how the tourism destinations changed over time.

Secondary analysis and secondary research are the terms used for the additional analysis of existing information (Stewart, 1984). However 'secondary analysis' can be a misleading term as although the data is from secondary sources the analysis is new (Smith, S. L. J.,

1995). Secondary research can be similar to the original purpose behind the collection of the data, but usually it is unrelated and aims to resolve an alternate issue (Stewart, 1984; Blaikie, 2000). Secondary research may involve the reanalysis of one data source or the integration of data from multiple sources (Stewart, 1984). The steps involved in secondary research are the identification of data sources, obtaining the information, and evaluating and integrating the data (Stewart, 1984).

As the researcher is one step removed from secondary data (Blaikie, 2000) any inconsistencies within the data or the sources need to be investigated (Stewart, 1984). When evaluating secondary information Stewart (1984) proposes six types of questions which should be addressed:

1. What was the purpose of the study? Why was the information collected?
2. Who was responsible for collecting the information? What qualification, resources, and potential biases are represented in the conduct of the study?
3. What information was actually collected? How were the units and concepts defined? How direct were the measures used? How complete was the information?
4. When was the information collected? Is the information still current or have events made the information obsolete? Were there specific events occurring at the time the data were collected that may have produced the particular results obtained?
5. How was the information obtained? What was the methodology employed in obtaining the data?
6. How consistent is the information obtained from one source with information available from other sources?

One guideline for improving data quality is to ensure the use of reliable data collection methods (King et al., 1994). Consistent procedures were applied to the National, State and regional studies that produced the data for the tourism destinations investigated in this study. Change in the methodology or classifications are available with the data.

Utilising multiple independent sources can also increase confidence in the data, presuming similar data and/or conclusions have been found (Stewart, 1984). If disagreement between sources occurs it is important to establish the rationale for any differences. Knowing information about the data sources can often explain what initially appear to be inconsistencies between varying studies. It can often be an operational definition that differs

across the studies rather than the variable itself. If the reason for the differences cannot be explained, the credibility of each source should be assessed (Stewart, 1984). It is especially important to know about the primary data collection methods when the results are expressed as percentages. A percentage is relative and as a result a large percentage change may simply be the result of a small sample size (Stewart, 1984).

3.4.2.1 Secondary Data in Tourism

Tourism statistics are collected for numerous purposes, such as determining the magnitude/significance/impact of tourism on a destination, assisting in future planning, for marketing and promotion purposes, determining the effect on the balance of payments, and establishing development activities (Burkart & Medlik, 1981; Latham, 1989; Wöber, 2000). Collection of data on international tourism is often more readily available than for domestic tourism, due to the role of international tourism as an export and the increased difficulties in collecting data on national travel (Latham, 1989).

Statistical data which can be used to describe tourism destination development can be broadly grouped into three types: the visitor, accommodation, and general indicators of growth. Data on tourists/visitors has been categorised (Table 3.3) as relating to volume, expenditure, characteristics of the tourist, and characteristics of the trip undertaken (Burkart & Medlik, 1981; Latham, 1989).

The volume statistics are usually measurements of arrival, trips, and tourist nights, and are often broken down further into the purpose of travel, such as business and leisure (Latham, 1989). The overall number of arrivals/departures/visitors is often used as the main indicator of visitation, as discussed in Chapter Two. This data is most useful for transport carriers, such as airlines, as the length of stay is not relevant to their sales. Total visitor nights is a better measure of accommodation usage and the potential level of impact on the destination as it incorporates the two components of visitor numbers and length of stay.

Visitor expenditure statistics provide a measure of the value of tourism to the area. This variable is often separated into the type of expenditure, such as accommodation, meals, entertainment, shopping, and travel (Latham, 1989). The calculation of the average

expenditure per visit or night provides a general indicator of the type of visitors and the typical spending pattern (Burkart & Medlik, 1981).

Table 3.3 Tourist/Visitor Statistics.
Common data variables which are measured over time.

Type	Category	Sub-Categories
Visitor Statistics	Volume	Arrivals / Visitor Numbers
		Visitor Nights
		Length of Stay
		Trips
	Expenditure	Accommodation
		Food & Beverage
		Entertainment
		Shopping
		Travel
	Tourist Characteristics	Gender
		Age
		Stage of Life
		Occupation
		Income Bracket
		Origin
	Trip Characteristics	Travel Party / Group
		Origin
		Destination(s)
		Purpose
		Mode(s) of Transport
Accommodation Type		
Activities		
Places Visited		
Type of Tour		
Timing		

The characteristics of the tourist are usually measurements of age, gender, occupation, income, stage of life, group type, and the nationality/country of residence for international visitors or state/city/postcode for domestic tourists. Some studies also consider the forms of media used to access information, attitudes on past holidays/destinations visited, and holiday planning (Burkart & Medlik, 1981).

The characteristics of the trip consider the multiple destinations that are often included in a holiday journey. This usually provides measurements of origin, destination(s), timing, purpose, mode(s) of transport, accommodation type, activities undertaken, places visited, and type of trip (tour vs. independent travel) (Burkart & Medlik, 1981; Latham, 1989).

In addition to data on visitation, data is collected on the supply of tourism products in a destination. This primarily relates to the provision of accommodation (Table 3.4), although more recent studies have included tour operators, such as the Tourism Queensland Regional Tourism Activity Monitor (R-TAM).

Table 3.4 Tourist Accommodation Statistics.
Common data variables which are measured over time.

Type	Category	Sub-Categories
Accommodation Statistics	Supply	Number of Establishments
		Number of Rooms
	Volume / Demand	Number of Room Nights
		Number of Bed Nights
		Occupancy Rate
	Economic	Takings
		Employment

The main measurements of supply are the total number of accommodation establishments in a particular area, and the total number of rooms provided. The data is usually separated into the different forms of accommodation, such as hotels and motels, units and flats, and caravan parks.

The level of visitation, that is the demand by visitors to the destination, is also measured for those staying in commercial accommodation. This is usually measured as the occupancy rate for each form of accommodation. This variable, which is often provided on a monthly basis is commonly used to illustrate the seasonality that exists in tourist destinations.

Data on the accommodation sector also provides indicators of the economic impact of tourism. This is measured as the takings, or income received, as well as the level of employment within this industry sector. Data on takings provides a second measurement of monetary flows, in addition to visitor expenditure, discussed above.

Tourism in a destination usually develops alongside the general development of a the area. As a result non-tourism data can still provide useful indicators of the growth within the destination (Table 3.5).

Table 3.5 General Growth Statistics.
Common data variables which are measured over time.

Type	Category	Sub-Categories
Growth Statistics	Population	Age Bracket
		Region
	Economic Growth	National
		State
		Regional
	Interest Rates	General Loan Rate
		Home Loan Rate
	Building Activity	Residential vs. Non-residential
		Public vs. Private
		Type, e.g. Hotels

A main indicator of general growth is the increase in the local population. This variable is often separated into age categories, which assists in determining whether the destination is also attracting retirees as permanent residents.

Other indicators also provide data on the underlying economic climate, using economic growth rates and interest rates, as well as the level of infrastructural development, as indicated by the level of building activity.

Variables from all these categories will be presented and analysed in Chapter Five to illustrate the changing levels of visitor demand, accommodation supply, and general growth at the various levels of the tourism case study.

3.4.2.2 Limitations Associated with Tourism Data

Methodological problems can be associated with survey research and the situation becomes more acute in the study of tourism (Latham, 1989). Problems associated with the collection of data on tourists includes the high level of mobility inherent in tourism, and the interviews are often conducted in unfamiliar places with crowds, noise, and unpredictable weather conditions (Latham, 1989). Difficulties associated with analysing tourism include a lack of credible data, high level of diversity among tourism businesses, the geographical nature of tourism, and the lack of coherent organisation of the industry (Smith, S. L. J., 1995). Analysis of tourism statistics is further complicated by the lack of comparability between

data, due to differences in the definition of the variables measured, as well as varying methodology and procedures (Latham, 1989).

A difficulty associated with time-series tourism data is missing values. According to Wöber (2000) the missing data situation for time-series data can arise in two ways: missing data points or a missing variable. The second situation often arises as a result of amalgamations during the data collection phase. However it is important to note that even an incomplete set of data can provide insight into tourism activity at a destination (Wöber, 2000).

Domestic tourism is usually a much greater volume than international tourism and it is likely that domestic levels are underestimated due to use of alternate accommodation and travel to a wide variety of areas (Latham, 1989). The underestimation is compounded by the fact that many tourism surveys often ignore day-trippers (Cockerell, 1997). As a result the actual demand may be significantly underestimated (Wöber, 2000).

Additionally tourism statistics are usually estimates rather than exact values (Latham, 1989). To ensure conclusions are sound it is recommended that a number of data sources are used (Wöber, 2000).

In general, the tourism industry lacks “consistent, credible, and coherent data” (Smith, S. L. J., 1995 p.2). It was realised in the early 1980s that there was a need for domestic tourism data that incorporated the volume, value, and characteristics of tourism for a country and the same information for its individual destinations (Burkart & Medlik, 1981). For this work, where consistent collection makes it possible, tourism data variables have been collected at national, state, regional, and local levels. This allows for a comparative analysis of the trends and seasonality patterns at each level of the case, as well as between the three local areas.

As previously mentioned, secondary research involves the identification of data sources, obtaining the information, and evaluating and integrating the data (Stewart, 1984). As “we are simply not capable of seeing things whole”, theories are built and tested on the properties of things rather than the things themselves (Dubin, 1969 p.30). This necessitates the establishment of criterion indicators for the quantitative time-series variables that make up the destination system (Table 3.6). This also allows the relationships between the

properties to be tested (Dubin, 1969). When analysing a variable the focus is on the amount or degree to which the property is present within the system. Alternately, an attribute is a property that is either present, or not present (Dubin, 1969).

Table 3.6 Data Variable Criteria.

The criteria used to determine the possible variables which could be collected, measured and analysed to assess the applicability of the proposed model in the tourism destination case study.

Criteria	Sub-Criteria	Measure/Basis of Calculation	Sources of Secondary Data
Economic Criteria	Visitors - Domestic - International	Number of Arrivals	Govnerment Statistical Sources
	Visitor Spending	Average Spending per Day per Visitor	Govnerment Statistical Sources
	Property Ownership	% of Local Residents to External Owners	Govnerment Statistical Sources
	Employment	Number of Positions - Full-time vs Part-time/Casual	Govnerment Statistical Sources Individual Businesses
	Investment	Amount and Type of Investment Level of Innovation, Risk, Uncertainty, Control	Govnerment Statistical Sources Australian Bankers
Infrastructure Criteria	Accommodation Products Offered	Number/Size of Businesses - Caravan Parks, Hostels, Hotels, Motels, Resorts	Govnerment Statistical Sources Business Proposals
	Other Tourism Products Offered	Number/Size of Products - Attractions, Tour Operators, Information Centres	Govnerment Statistical Sources Business Proposals Visitor Information & Guides
	Public Facilities	Size & Type of Facilities	Facility Development
Marketing Criteria	Target Market / Product Markets	Branding Presentation of People & Activities	Brochures Govnerment Statistical Sources RTA Documents
	Consumer Behaviour & Preferences	Attractions Visited	Govnerment Statistical Sources Local Visitor Surveys
	Length Of Stay	Average Number of Nights	
	Type of Booking	Direct (Phone or Internet) or Travel Agencies	Accommodation Providers
	Access	Location of Nearest Airport Number of Airlines & Flights	FAA
Social Criteria	Local Attitude to Tourists	Irritation Index	Newspaper Articles
	Local Employment	% Local to Total	
	Local Residents	Numbers Housing Development Telecommunications	Govnerment Statistical Sources Telstra
	Demographic Characteristics - Tourists	Age Gender Origin	Govnerment Statistical Sources
Environmental Criteria	Natural Environment	Amount of Land	Govnerment Statistical Sources Aerial Photography
	Quality of Environment	Impact Assessments	National Parks Development Proposals

Of the quantitative methods of data collection described by Bryman (1992), the use of official statistics provided a range of tourism and development variables measured over time. The research process is enhanced by increasing the number of observations, which are the ‘implications of the theory’ (King et al., 1994). The criteria for data collection is observations for which data is available or can be collected. Additionally data does not need to be at the same level of analysis. Instead different levels of aggregation, or various time periods may be appropriate (King et al., 1994).

3.4.3 Data Analysis

Social science research should aim to be both general and specific, as it should provide understanding about classes of events and about specific events at certain times (King et al., 1994). For analysis of change over time, time is in fact a proxy for other processes that operate over time, as it is not time itself that produces the change (Simon, 1969). A significant and common obstacle in the study of change over time is that change in the dependant variable(s) may occur very slowly over a long period of change, and it may not be possible to observe this entire period. Fortunately this is overcome where the data has already been collected over time, as has been done for this study. This allows for the analysis of the time series data, which aims to examine the data from successive periods to locate and explain the changes that have occurred. Additionally quantitative research can aim to identify relationships between two or more variables (Simon, 1969). This is an important aspect of this study.

For qualitative historical data, the first step in the analysis is to summarise the data, with the focus on generalisation and explanation (King et al., 1994). The qualitative data needs to be organised into a “readable narrative description with major themes, categories, and illustrative case examples” (Patton, 1990 p.10). According to King, Keohane, and Verba (1994) the guidelines governing the summary of historical details are to focus on outcomes that need to be described and/or explained, simplify the available information, and relate back to the purpose of the summary and the audience. As qualitative and quantitative are alternate but not mutually exclusive strategies for research, qualitative information may be presented alone or in conjunction with quantitative data (Patton, 1990). For this work the qualitative historical information (Chapter Four) provides the backdrop for the quantitative time-series data (Chapter Five).

Statistics achieve two purposes. Firstly, to describe and organise large amounts of quantitative data (descriptive statistics). Secondly, to allow inferences to be made from the study area to the wider arena (inferential statistics). Although distinct, the two functions are closely related, as making inferences about the larger population requires the efficient description of the observed phenomenon (Levy, 1968). Chapter Five utilises descriptive statistics to present the time-series data on the change in the destinations as tourism developed. The final chapter (Chapter 6) considers the inferences that can be made about

tourism destination development. This inference from the small number of observed variables about the larger phenomenon provides generalisations rather than facts (Levy, 1968). These statements aim to increase understanding of the manner in which the tourism system develops and operates, and can provide the basis for hypotheses that can be tested in the future. The remainder of this section provides an outline of the methods involved in analysing time-series data.

A number of different types of time-series data have been included in this research to ensure an understanding of the development of tourism within the context of local development and external influences. Of the seven time-series types discussed by Chatfield (1989) three are used in this analysis: economic, marketing, and demographic.

There are four types of objectives of time series analysis (Chatfield, 1989). Firstly description, which involves the plotting of data to realize simple descriptive measures, including trend, seasonal variation, other cyclic changes, 'irregular' fluctuations, turning points, and outliers. These measures are a particularly appropriate form of analysis when the variation in the data is predominantly due to the trend and/or seasonality. The second objective is explanation, which is appropriate for time-series analysis of two or more variables. The variation in one variable is analysed to establish whether it describes the variation in an alternate variable. Prediction is the third objective. This involves the use of observed values of a variable to forecast future values. The final objective is control. This is used for maintaining the 'quality' of the output of a process as intervention can occur if the variable strays from the required value/range (Chatfield, 1989). The analysis of the data variables for this study is based on the twin objectives of description and explanation. Existing predictive time series data are included in the study as indicators of expected tourism development within a destination but this work does not involve the use of past data to forecast future values. The objective of control is not relevant to this work as the data is not collected under the required conditions.

The descriptive analysis clarifies the main properties of a series, and should be tried before using more complicated techniques (Chatfield, 1989). Descriptive analysis involves plotting the observations against time. This is the first and most important step in time series data analysis and requires consideration of the choice of scale, the size of the intercept, and the use of a continuous line or separate dots. The second part of a descriptive analysis involves

the decomposition of the variation in the series into the types of variation. This is particularly useful when the variation is dominated by trend and/or seasonality, both of which are relevant for this study. Trend is the ‘long-term change in the mean level’ and includes all cyclic variation whose ‘wavelength’ is longer than the observed time series. Seasonal variation is based on cyclical annual variation. The third variation is ‘other cyclic changes’ which is a variation that cycles with a fixed period that is not annual. Finally there are the variations that remain when the other three types of variation are removed from the data. These may or may not be random and can be analysed through the use of moving average or autoregressive (stochastic) models (Chatfield, 1989). It is important to note that a ‘stationary’ time series implies there is no systemic change in mean (no trend) or variance, and periodic variations have been removed. A stationary series then presents the ‘remaining irregular fluctuations’ (Chatfield, 1989).

The stochastic process is a model that describes the sequential relationship between a variable and time (Richards, 1979). This generates a one-dimensional time series with evenly spaced observations, which becomes more complex if observations are not at regular intervals. ‘Continuous’ data can be transformed into discrete data through sampling or aggregation. This process deals with a system that is developing over time and describes the way that the data series fluctuates over time or distance. The oscillations reflect a pattern of serial correlation, or autocorrelation which can be used to illustrate dependency between variables in a time-series at different lags (Richards, 1979).

A specific technique involved in the analysis of time-series data is to transform the data (Chatfield, 1989). This transformation method is particularly relevant to the data collected for this study as it deals with the significant effect of seasonality. The transformation makes the seasonal effect additive or multiplicative. The additive transformation technique is used when the seasonal effects seems to increase with the trend as it makes the seasonal effect constant from year to year (Chatfield, 1989).

To determine the trend of the data two techniques are used, trend analysis and lowess smoother. Trend analysis will fit a general trend model to time series data. This study utilises both linear and polynomial models as required by the data. Trend analysis is particularly appropriate when there is no seasonal or cyclical component in the data series (Minitab Inc., 2005). For each trend line the R-squared value (coefficient of determination)

or the Mean Absolute Percentage Error (MAPE) is displayed. The R-squared value ranges from 0 to 1, indicating how closely the estimated trendline values correspond to the data observations. The closer the R-squared value is to 1 the greater the relation between the trendline and the data. The MAPE also measures the accuracy of the fitted trend to the data and is expressed as a percentage, with a smaller value indicating increased accuracy (Minitab Inc., 2005).

The LOWESS (LOcally-WEighted Scatterplot Smoother) method is used to fit smooth curves to a data set. The smoothing method requires no predetermined model for the data set (Upton & Cook, 2002). This study utilises Minitab Statistical Software to fit the lowess smoothed line to the time series data. This technique is particularly applicable when the curvature of the data observations does not change dramatically. The smoothing parameter ranges between 0 and 1, depending on the level of smoothing required (Minitab Inc., 2005).

When using observations of two time series, to establish the relationship between them, bivariate time-series analysis is utilised. This technique uses the mean and autocovariance functions for each series, and the cross-covariance function and its related function, the cross-correlation (Chatfield, 1989). This study utilises Minitab Statistical Software to calculate the Pearson correlation coefficient between a pair of data variables to measure the degree of their linear relationship. The resultant correlation coefficient can range from -1 to +1. If one variable increases as the other decreases, then the correlation coefficient will be negative. Alternatively, if the two variables increase together the correlation coefficient will be positive (Minitab Inc., 2005). This method is particularly useful when the aim of the study is to increase understanding as the analysis focuses on the interaction between components of the system (Dubin, 1969).

Time-series data can also be presented as a percentage change on a past time period. This percentage change ratio is defined as the ratio of the amount of change between two time periods and is used to express the amount of change in a variable relative to the starting value of that variable. It can be particularly helpful when comparing data as it takes into account the size of the variable at the starting point. However caution needs to be exercised as a small initial number can be paired with a large percentage change despite being a relatively small increase (Loether & McTavish, 1988).

In Chapter Five, a combination of these time-series analysis techniques are used. The primary analysis is descriptive, using both data plotting and decomposition of the variation. This is supported by transformation, trend analysis, lowess smoother, correlation, bivariate analysis, and percentage change where appropriate.

3.5 Conclusion

This chapter has described the research process that was selected for this study of tourism destination change. Each stage of the process (Figure 3.1) has been explained. The first two stages, defining the research topic, problem, aim, and questions were established in Chapter One and the third stage was defined in Chapter Two, with the development of the proposed Multi-Trajectory Model of Tourism Destination Change.

The remaining six stages have been addressed in this chapter. The choice made for each was discussed and the selection justified. The Integrative Systems Model of Tourism Theory and Planning (Getz, 1986) was selected as the research model for this study. A case study approach was considered the appropriate research design, given the overall research aim to be addressed by this study. A multi-method approach incorporating both qualitative and quantitative components was chosen to increase the level of understanding of tourism destination change. Secondary data was selected to study past change in the tourism system of destinations under investigation. The quantitative secondary data was time-series data that could be represented and analysed using various time series techniques.

This chapter has therefore provided the basis for the qualitative investigation of the change and development of tourism within the case system in the next chapter (Chapter 4), and the quantitative time-series analysis of tourism-related variables from the case destinations conducted in the subsequent chapter (Chapter 5).

Chapter 4 The Development of a Tourism System at a Destination - An Historical Overview

4.1 Overview of Chapter Four

The previous discussion of models used in understanding tourism development showed how various aspects of tourism can be viewed. Broadly speaking they were useful in their time, but note that they had greater limitations as they tried to incorporate the increasingly complex factors involved. This chapter describes the development of the tourism system that encompasses a number of levels, from the three Local Government Areas; Noosa Shire, Maroochy Shire, and Caloundra City, which make up the Sunshine Coast, continuing through to the State, National, and Global levels. This history of tourism development, within the context of its place in the overall history of Australia, shows just how many factors affect tourism development and therefore the need for a model that incorporates this complexity.

The chapter focuses on the development of tourism within this multi-layer system and describes changes to the system over time. It identifies some of the possible reasons why tourism has changed or developed in the case study area. This provides a context for the data analysis in Chapter Five which tests the Multi-Trajectory Model of Tourism Destination Change proposed in Chapter Two.

The chapter is in three sections. The first defines the tourism system under investigation. The second describes the development of tourism within the study area. This historic overview is divided into three parts: the general development of tourism within the Australian context through the 20th Century; an historic summary of tourism growth in the study area from 1900 to 1980; and the development in the area from 1980 to 1997. Given the availability of time-series data, it is the latter which is of most relevance for the data analysis in Chapter Five. The chapter concludes with a summary of critical change factors that have affected tourism development in the case area, and a review of the Research Issues derived from the proposed Multi-Trajectory Model of Tourism Destination Change, identifying appropriate data variables for the testing of each Research Issue in Chapter Five.

The separation point of 1980 was chosen for two reasons. The first was data driven. The Australian Bureau of Statistics (ABS), the Bureau of Tourism Research (BTR), and the Queensland Tourist and Travel Corporation (QTTC), now Tourism Queensland (TQ), commenced collection of consistent, multi-variate, time-series, tourism related data around this time. However, some relevant data is available prior to 1980, and where appropriate, will be presented. The second reason for the choice of 1980 was that there has been significant tourism development since then. The end point of 1997 is also data driven, as at that time a number of the time series tourism data collections ceased. The replacement studies use different methodologies, and although it was argued that ‘better’ tourism data was provided, these studies are not comparable to the earlier data.

As the change in the study area considers change at the local, regional, state, national, and global levels for the majority of the 20th Century, it is not possible to discuss all the tourism-related changes that occurred. As discussed in Chapters One and Two, tourism growth is clearly accompanied by social, economic, structural, and environmental changes. The material presented in this chapter is designed to support the Chapter Five analysis. Consequently it summarises the different phases of tourism development on the Sunshine Coast, and the wider social, economic and political context.

4.2 Defining the Tourism Case System

The Sunshine Coast tourism system has a number of levels, which can be defined by geographical boundaries (Figure 4.1). At the base level are the three local areas: Noosa Shire, Maroochy Shire, and Caloundra City. These three areas, when aggregated, comprise the ‘Sunshine Coast’. Tourism within the Sunshine Coast is shaped by changes in the higher levels of the tourism system, namely the State of Queensland and the Nation of Australia; which are in turn affected by global events and trends.

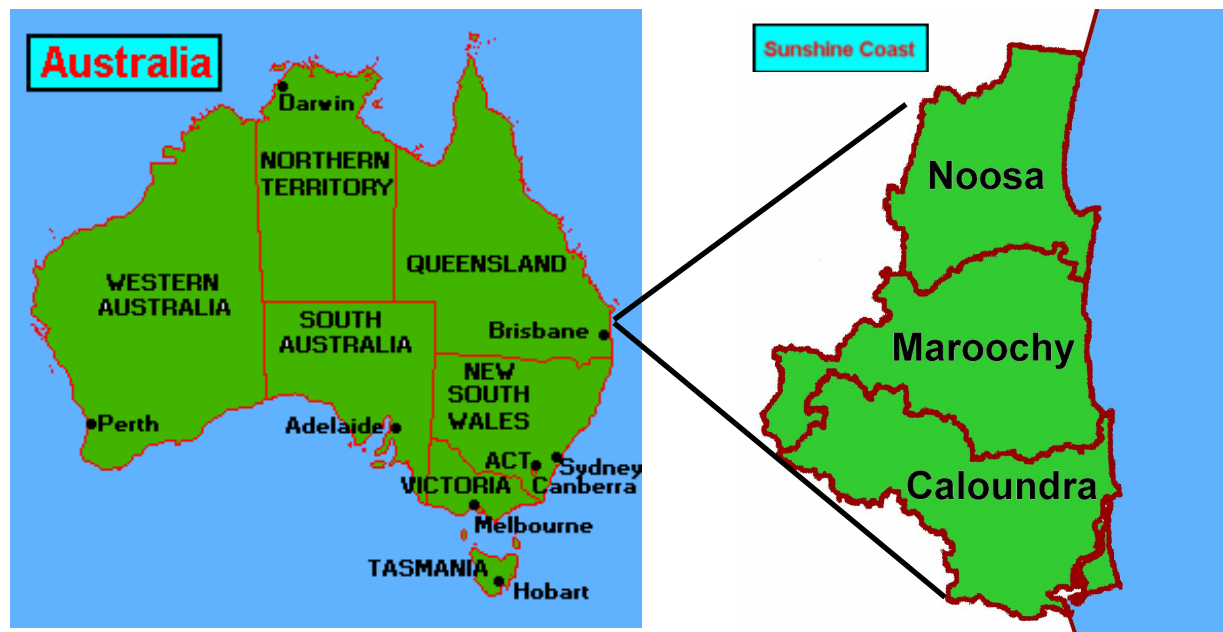


Figure 4.1 The Sunshine Coast Case Study System.
Map of Australia, showing the location of the Sunshine Coast and its three regions: Noosa, Maroochy, and Caloundra (Ralston, 2001).

The five levels of the tourism system allow the impact of a change at one level to be assessed on other levels in the hierarchy. In addition, the inclusion of the three local areas within the Sunshine Coast provides the opportunity to examine the manner in which different combinations of change agents, policies, events, and responses to development can produce different outcomes.

The top three levels of the case study have clear geographic boundaries that have remained unchanged for over a century. This ensures that the use of information and data at these levels is consistent. However, the lower levels, while being geographic areas, do not have clear, unchanging boundaries. The term ‘Sunshine Coast’ has been defined in different ways, and its actual and perceived boundaries have changed over time. The three Local Government Areas have also evolved, with some changes to boundaries and names.

4.2.1 Location and Definition of the Sunshine Coast

The Sunshine Coast region extends for about 45 kilometres along the south-eastern Queensland coast, north of Brisbane, from Caloundra through Maroochy to Noosa

Heads (Figure 4.2). It is a coastline of intermittent beaches, headlands, and small estuaries between Pumicestone Passage and Noosa River.

Brisbane, with a population of 1.6 million in 2001 (OESR, 2004a), occupies a bay-side location and lacks the long sandy surf coastline offered on the northern Sunshine Coast and the much more developed Gold Coast to the south. These features mean that the region was an ideal location for beach front development (Toghill, 1982).



Figure 4.2 Map of the Sunshine Coast.
(Wilkins Tourist Maps, 2004)

The term ‘Sunshine Coast’ was initially used in the 1970s as a marketing label to attract tourists and residents to the area (Ralston, 2001). At that time, the region included the main townships of Noosa Heads, Maroochydore, and Caloundra, as well as the smaller coastal towns of Mooloolaba, Coolum Beach, Peregian Beach, Sunshine Beach, and encompassed Noosaville, Tewantin, Buderim, Bongaree, and Bli Bli. Over time the hinterland was also considered part of the ‘Sunshine Coast’ region, incorporating the established towns of Nambour, Maleny, Montville, Mapleton, Cooroy, Eumundi, Cooran, Pomona, and Kin Kin. More recently the northern North Shore and Cooloola Shire have been included as part of

the region (Ralston, 2001). Geographically this extended the boundary north of the Noosa River.

In statistical data collections, the boundaries of the Sunshine Coast are usually defined in one of two ways. The Sunshine Coast is part of the Moreton Statistical Division (SD), which includes all of South East Queensland excluding Brisbane. Over time, this Moreton SD has been disaggregated into small regions. One common break down is the separation of Statistical Divisions into the Local Government Areas. The Sunshine Coast is not a single authority and therefore, for the purposes of this work the first definition of the Sunshine Coast region is the amalgamation of the three Government Authorities of Caloundra City (originally Landsborough Shire), Maroochy Shire, and Noosa Shire, encompassing a total area of 3137 square kilometres. The boundaries of these Authorities generally run east-west. Therefore, each Authority encompasses a strip of coastline, a coastal plain, and a hinterland area. The development along the coastal strip has been and continues to be defined by the Town Planning regulations of the three different Authorities.

As the area initially considered to be the Sunshine Coast encompassed part of all three shires and yet not all of each, the Sunshine Coast Statistical District was established. The boundaries of this Statistical District were defined in 1980 by a committee that included representatives from each of the three Local Government Authorities, the Sunshine Coast Tourism and Development Board, and the ABS. The Sunshine Coast Statistical District includes the coastal strip from Caloundra to Noosa Heads and inland to Tewantin, Nambour, and Buderim. This provides the second boundary definition used in this work (Figure 4.3). The boundary of the Sunshine Coast Statistical District was designed to incorporate the forecast area of major development through to the end of the 1980s (Rider Hunt and Partners, 1986). Within this Statistical District the northern most Noosa Shire contains Tewantin, Noosaville, and the coastal strip from Noosa Heads to Peregian Beach. In the middle, the Maroochy Shire contains the coastal strip from Coolum Beach down through Maroochydore and Alexandra Headlands to Mooloolaba, and inland to Buderim, Nambour, and Kenilworth. In 1980, the southern end of Caloundra, Kawana Waters, and Point Cartwright were part of the Landsborough Shire, which was changed to the Local Government Authority of Caloundra City in 1989.

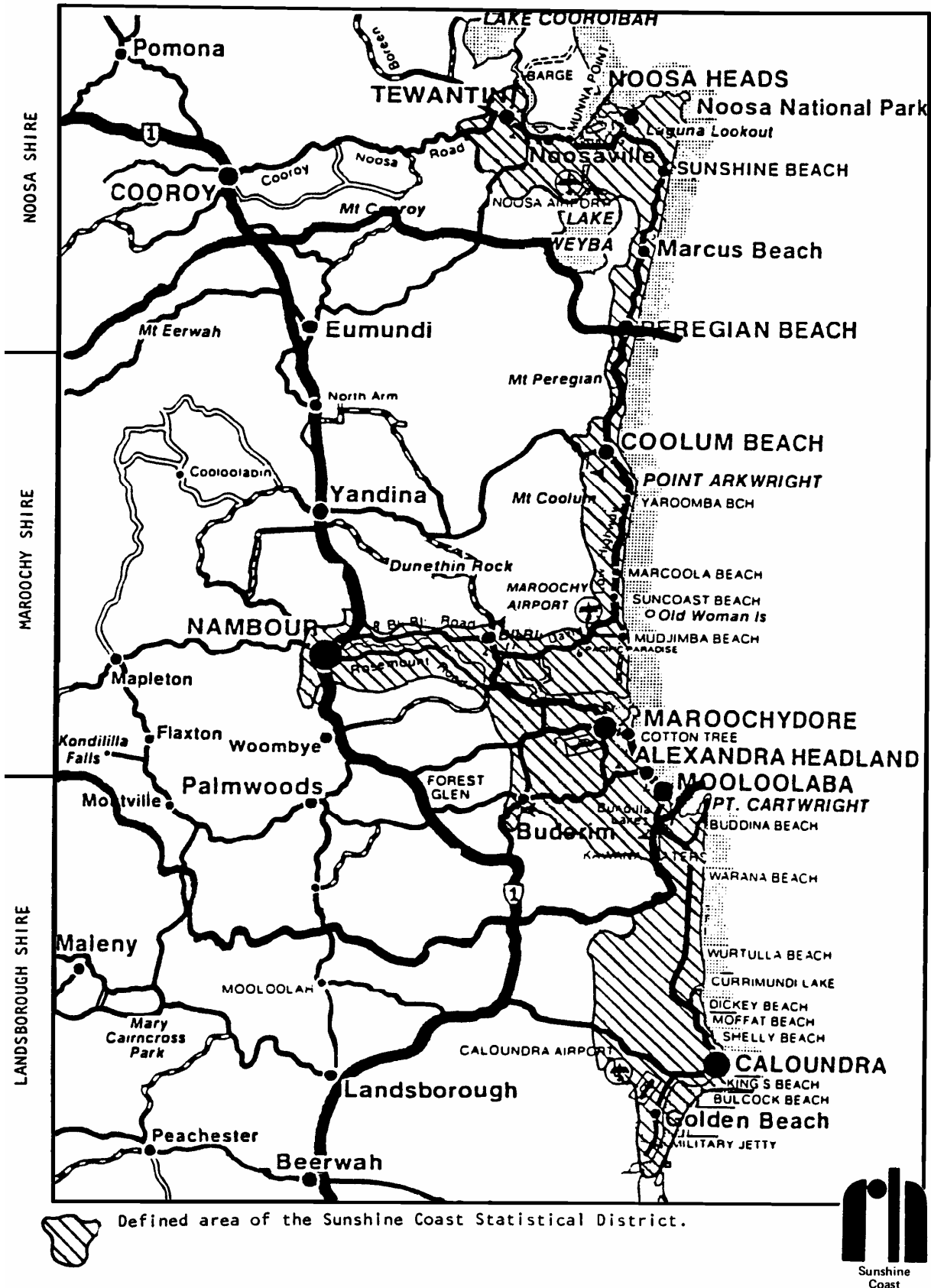


Figure 4.3 The Sunshine Coast Statistical District.
 The boundary of the Sunshine Coast Statistical District (SD), as defined in 1980. This SD includes the coastal strip from Caloundra to Noosa Heads and inland to Tewantin, Nambour, and Buderim. The boundary was designed to incorporate the forecast area of major development through to the end of the 1980s (Rider Hunt and Partners, 1986).

4.3 Changes in Australian Tourism during the 20th Century

In Australia, the 20th Century saw the growth of tourism as an activity available for the everyday person, and in parallel the rise of tourism as an industry. In addition to summarising the general changes in tourism over the last Century, this section addresses the changes in the social and political arena in which tourism operates, as well as developments in technology and transport that significantly affected modes of transport used throughout the 1900s.

Tourism and travel have changed from simply the domain of the wealthy or the adventurous to a common activity available to the entire population. This growth of tourism in Australia since the turn of the 20th Century was primarily affected by the combination of changes in social attitudes and technological advancements both within the country, and in the international arena (Hall, 1991). The large-scale increase in tourism worldwide is considered part of the post World War Two development. This growth has been partially attributed to the high economic growth of the developed countries through the 1950s and 1960s resulting in 'real wage' increases (PLI & PWA, 1980). Tourism is now considered "a major power of world trade" (Gunn, 2004 p.3).

Attitudes about tourism and travel have changed in Australia, as the majority of its people engage in annual holidays, weekends away, and expensive honeymoons. The Anglo-Celtic Australia of 1901 has been replaced with a multi-cultural society, which combined with increased globalisation and information technology, has seen Australians travelling to the far-reaches of the world. This desire for travel, both at home and abroad, is made possible by the corresponding increase in the disposable income of Australians and the introduction of paid annual leave. Family sizes have also dramatically decreased during the 20th Century, providing the opportunity for family holidays, as it became both affordable and practical for the entire family to travel together. In addition, medical breakthroughs and the growing awareness of the role of healthy living have generated an increasing number of healthy retirees able to take the time to travel.

In line with general development and changes in technology during the 1900s, transport options extended from horse drawn carriages, ships, and rail, to cars, buses, four wheel drives, aeroplanes, and ultimately wide bodied jets. These alternate modes of travel were further enhanced by access through improve roads, bridges, multiple lane highways, changing railway gauges, and both domestic and international airports. In addition to the advancements in the airline industry, there has been a dramatic fall in the cost of domestic and international air travel.

Changes in society and travel within Australia during the 20th Century gave rise to tourism as an industry. Over time the facilities catering to tourists have increased in terms of their number, size, and standard. The main forms of accommodation before World War Two were in (public) hotels and guest houses. During the late 1950s and the 1960s there was a boom in motel building, while the 1980s and 1990s saw frantic development of hotels and holiday units. This progress in accommodation reached the stage where entire resorts, like Yulara, were purpose built for the provision of services to those visiting attractions, such as Uluru (Ayers Rock). This reflected the global trend, particularly evident in developing countries, for the development of ‘integrated resorts’ (Butler, 1999).

To assist travellers in selecting destinations and organising transport and activities, there has been significant growth in the number of travel agencies, wholesalers, tour companies, motoring organisations, information bureaus, and related government agencies. There has been an accompanying increase in the extent and quality of the services provided, with a significant change being the advent of computerised reservation systems. Part of the growth in package deals has been the application of economies of scale to develop ‘value-for-money’ deals.

In addition to the supply of facilities and services, the tourism industry began to promote itself. The marketing approach, which is necessary to ensure the provision of information to potential tourists, has become increasingly professional and highly competitive. Beginning with posters, advertisements and brochures, there have been great advances in computer programs and printing hardware which have generated higher standards of presentation. In addition, the advent of the World Wide Web has opened up an alternate communication medium that still encompasses the powerful visual aids utilised in travel brochures.

4.4 Development of Tourism in the Case Area: 1900 – 1980

This section summarises change within the tourism case area from 1900 to 1980. The focus is on International, National and State changes and trends, and specific developments within the three Local Areas of the Sunshine Coast. This overview provides an understanding of the establishment of tourism at the various system levels, and their change and development over time.

4.4.1 1900 to 1915 - Pre World War One

At the turn of the 1900s Australia was experiencing the effects of a global depression that began seven years earlier and continued until 1904 (Berry, 2000). However it was also a time of optimism with the Commonwealth of Australia being proclaimed on the 1st of January 1901 (Barker, 1992). A period of change and development followed as government evolved. Queensland became a state, and in 1902 Brisbane became a city. Between 1905 and the beginning of the First World War, Australia's population increased from four to five million with schemes for assisted passage continuing to boost immigration, primarily from Britain (Mason, 1983). As a result cities and towns became increasingly urbanised and rural settlements generally grew at a moderate rate, with the initial focus on timber shifting to various agriculturally based industries (Mason, 1983). This was the situation on the Sunshine Coast, or North Coast as it was then called.

In 1905 the (Royal) Automobile Club of Queensland formed to cater for the growing use of the car (Barker, 1992). Australia was keeping pace with the developing world with an efficient travel network in the populated coastal areas, incorporating transport by ship, train, coach, bus, and car (Richardson, 1999). On the North Coast, the discovery of gold in Gympie in 1867 had ensured that by the beginning of the 1900s Gympie was linked to Brisbane by rail and road.

This inland access between Brisbane and Gympie reduced the need for transport via the coast and river system, and therefore the dependence on the ports, particularly Mooloolaba and Tewantin. As a result the coastal towns grew into peaceful seaside retreats. However,

the Noosa, Maroochy, and Mooloolaba Rivers were still the main transport routes connecting the coast and the hinterland. The importance of the Maroochy River is illustrated by the building of both Maroochy's first hotel and first permanent store on the river front. Additionally, in Noosa, the main town centre and population was based around the wharf at Tewantin.

The limited road access in the area was due to a lack of finance within the Local Authorities. The funding of Local Authorities in the late 1800s had made it difficult in sparsely populated areas, as the number of ratepayers was small and the geographical area large. This posed difficulties for the Local Governments in maintaining or improving the roads. By 1912, the three Shires of Maroochy (1902), Noosa (1910), and Landsborough (1912) had been established.

Of particular relevance to the development of coastal destinations was the general appeal of the beach. By 1906 surf bathing was legal in Sydney, the first surf bathers life saving club was established at Bondi, and surf carnivals had begun (Mason, 1983; Barker, 1992). A decade later, the Maroochy Surf Lifesaving Club was formed. It was the first on the Sunshine Coast and the second in Queensland. As an alternative to the surf beaches at Maroochy, Noosa Heads offered a protected beach and at that time was becoming known as an ideal location for safe beach swimming.

Like other aspects of Australia as it entered the 20th Century tourism was in an embryonic stage of development. However the beginnings of tourism were evident.

By the early 1900s, there had been little development at Caloundra. There were a few residents, mainly from Brisbane, a hotel, a guesthouse, and lighthouse. The river bar was dangerous and the road in was rough. At this time, travel to other locations on better roads appeared preferable (Holthouse, 1982).

The town of Maroochy had been established in 1900. It was a little village with no roads in and was used mainly for fishing and camping in the holiday periods. 1908 marked the beginning of Maroochy as a residential seaside resort with the first sale of coastal allotments by Thomas O'Connor. A number of holiday huts were built, primarily by cane

farmers wanting a weekender by the water. In addition, Cotton Tree Point, on the south head of the river mouth became a popular camping site.

Inland, a narrow train line between Buderim and Palmwoods had been constructed to transport fresh produce. The rail route also provided picnic excursionists from Brisbane the opportunity to reach Buderim. Despite the discomfort of the journey, the travellers enjoyed this winding and hilly ride through the rainforest, as well as the extensive view over the Sunshine Coast from the mountain top. Travellers continued to take this trip until 1935 (Holthouse, 1982).

In the late 1800s Noosa Heads was considered a 'watering hole' for the people of the mining and agricultural town of Gympie, although the railway link from Brisbane allowed access from further afield. In 1900 there were only five houses, including Lagoon House, a guest house mainly for cattlemen and miners. Noosa Heads was gradually gaining a reputation as a relaxing location for swimming, fishing, and natural bushland, with picnics in Noosa Woods a popular activity. However access was limited as visitors were still dependant on motor boats for transport from Tewantin.

By 1914 some travel within Australia was already being 'packaged', combining transport, accommodation, and excursions. State tourist bureaus were being established, and the international travel company, Thomas Cook, had opened a Melbourne office (Richardson, 1999). However it would not be until the 1970s that the 'Sunshine Coast' was packaged and holidays sold to the Southern States.

4.4.2 1915 to 1919 - World War One

During the war, the subdivision and sale of coastal allotment continued in the Shire of Maroochy. This extended the coastal development south from Maroochydoore to Alexandra Headland. The area at the mouth of the River that was used for camping was officially proclaimed a Camping and Recreational Reserve. By the end of the war, the coastal Maroochydoore/Mooloolaba area was developing as a fishing hub, a farming area with dairy and fruit farms, and a seaside resort.

The main tourism development in Caloundra during the war was the completion of the Grand Central Guest House by Allan King. The King family had been running a guest house at Kings Beach since the 1890s.

Little change occurred in the coastal area of the Noosa Shire as access to Noosa Heads continued to necessitate a boat trip from Tewantin.

4.4.3 1919 to 1939 - The Interwar Period

The twenty years between the world wars saw significant developments in the various modes of transport. Commercial air travel began to grow with Qantas, Ansett, and Australian National Airways (ANA) all founded during this period (Barker, 1992). Despite the reduction in road construction during the depression years of the 1930s, the number of vehicles on the road continued to increase. The railway system improved with electrification, suburban rail expansions, and single gauge lines linking the eastern capital cities. During this period interstate travel was also conducted by sea, commonly on P&O vessels (Mason, 1983). By the end of the 1930's air travel had established reliable services, first class travel by ship was luxurious, railways were faster, more comfortable, and some were even air-conditioned (Richardson, 1999).

During the 1920s, two significant bridges were built in Noosa. The first connected Tewantin to the area which was to become Noosaville. This was settled predominantly by wealthy miners building holiday and retirement homes. A second bridge provided road access to Noosa Heads, heralding the beginning of the development of Noosa Heads. As a result, Lagoon House was extended and the painting of the name across the roof was to provide the landmark for Noosa for almost fifty years.

Also in the late 1920s, in line with a road building proposal being considered by the Noosa Council, an entrepreneurial developer, T.M. Burke approached the Council about his plan to purchase 470 acres of their land in return for the construction of bridges and all-weather roads. Approval of the plan resulted in the subdivision and sale of seaside residential blocks at Noosa Beach Estate, now known as Sunshine Beach. Sales continued through until 1935 when further development was postponed because of the depression and then the Second World War (Edwards, 2001).

To the south, the first sale of allotments began in Coolumb in the early 1920s (Jenkins, 2001). The other entrepreneurial developer, O'Connor, continued the sale of subdivisions along the coast of the Maroochy Shire. In addition he also incorporated sports areas into the 'town plan', organised the first Maroochy Show, established a dairy, and built a town hall, which was used to show moving pictures (Holthouse, 1982). According to an article in the Nambour Chronicle in March 1927, the conveniences for visitors to Mooloolaba included "a boarding house, café, stores, telephone exchange, life-saving club, ambulance, public dressing sheds for bathers and Clarke's Royal Mail bus service....*and* books may be delivered twice weekly" (reprinted in Maroochy Shire Library Service, 1994 p.46 italics added).

Land in Caloundra was also being subdivided and residential homes established. In addition, there were a growing number of farms, with the produce sent to Brisbane via the Pumicestone Passage. Thus tourism on the Sunshine Coast developed as the region itself developed.

By the 1930s, the three main coastal resorts of Noosa Heads, Maroochy/Mooloolaba, and Caloundra were all separately linked by road to the inland highway. This resulted in the development of a distinctive local character for each town. There was to be no coastal linkages until the 1960s. A common characteristic was the peaceful and friendly atmosphere present in each location. All the townspeople knew each other, the guest houses provided a family environment and the same visitors returned year after year. As with the beaches to the south of Brisbane at the Gold Coast, the attraction extended beyond Brisbane, with these developing destinations attracting visitors and new residents from further afield (Toghill, 1982).

The late 1920s saw the introduction to the Sunshine Coast of the aeroplane. The aerodrome site was selected and cleared, and a landing strip marked out for light planes. This is now Aerodrome Road in Maroochy (Maroochy Shire Library Service, 1994).

This period also saw development in the role of government in tourism. Federally, the Australian National Tourism Association (ANTA) was founded by private sector interests to encourage international tourism (PLI & PWA, 1980). At a State level the Queensland Government Tourist Bureau (QGTB) was formed to replace the Queensland Government

Intelligence and Tourist Bureau, taking over responsibility for bookings and promotion (Barr, 1990b). By the 1920s the state tourist bureaus, which had begun as state agencies linked to government departments, like the railways, were major booking offices for transport and accommodation (Davidson & Spearritt, 2000). Also impacting on travel was the introduction of one mandatory week's paid annual leave for the working people in 1936 (Richardson, 1999).

Beach tourism continued to grow in popularity with the increase in accessibility and the introduction of surfboarding. However, due to concern regarding modesty issues swimming costumes continued to be regulated (Barker, 1992). In addition coach companies were taking tours to remote locations, and camping grounds and caravan parks began to be established (Richardson, 1999).

4.4.4 1939 to 1945 - World War Two

In addition to the safety precautions, Australian's lives were also significantly altered by wartime regulations and workforce changes (Mason, 1983). The Federal Government centralised and controlled the country's work-force and limited production (Chambers, 1999). Travel was restricted and interstate travel necessitated a pass and a valid reason (Mason, 1983). Women replaced men in the work-force, including factories, farming and certain areas of the military (Chambers, 1999).

Thousands of soldiers camped in the Sunshine Coast region during World War II (Angell, 2001). The military believed that the strip between Caloundra and Noosa, was a logical landing spot for the enemy (Maroochy Shire Library Service, 1994). When the war reached the Pacific, Caloundra and Bribie Island became armed camps to protect the entrance to the Port of Brisbane. The beaches were guarded with barbed wire and machine guns, and on the coast, training camps and firing ranges were established. After the war, one such area was subdivided as a housing estate, becoming Battery Hill in Caloundra (Holthouse, 1982).

4.4.5 1945 to 1950

The increasing role of Australia in the international arena dispelled the pre-war perspective of relative isolation (Mason, 1983). This internationalisation, combined with increasing technological advancements in transport changed the general attitude to travel (Richardson, 1999).

In the post war period the Federal Government exercised strong controls over the economy, aiming to establish a welfare state. Additionally government nationalisation of key industries was proposed, including the airlines. As the High Court deemed such nationalisation unconstitutional the government established its own domestic airline, Trans Australian Airlines (TAA), and took over the international carrier Qantas (Mason, 1983; Barker, 1992; Chambers, 1999; Richardson, 1999).

At the state level the Queensland Tourist Development Board was established in 1946 to determine the potential of Queensland's tourism resources (Barr, 1990b), as discussed in Chapter Two. Their report (QTDB, 1947), published a year later, provided a comprehensive review of the State, considering the 'attractiveness' of Queensland to the local, interstate and international tourists. The study determined that Queensland had numerous tourist attractions and sunny weather, but at that time did not possess the standards of transport and accommodation necessary to satisfactorily cater for interstate and international tourists (QTDB, 1947). The board recognised the limitations to tourism infrastructure development created by the existing short-term lease land tenure arrangements, recommending perpetual or 99-year leases. Another major concern addressed in the report was the need to issue permits to build as building restrictions were still in place from the war. Other issues addressed by the Board included publicity, staff training, hotel classification, entertainment, youth hostels, conservation and creating 'tourist mindedness' (QTDB, 1947).

Of the 20 Queensland key areas identified in the report, two incorporated the Sunshine Coast region. The first was from Caloundra north to Coolum, and included the hinterland. It was thought that the 'seaside resorts' of Caloundra, Mooloolaba, Alexandra Headland, Maroochydore, and Coolum offered 'similar attractions' to the Gold Coast, although they were less developed. As well as the surfing beaches, the inland waterways were considered ideal for safe swimming, boating activities, and fishing. The report also commented on the

inland 'resorts' of Maleny, Montville, and Mapleton. The poor quality access road from the coast to this fertile mountain range with its panoramic views was noted. In addition, improvements to some of the roads connecting the coast to the Bruce Highway were considered necessary (QTDB, 1947).

The second key area incorporated Bundaberg, Maryborough, and Gympie to Coolum. Relevant to the Sunshine Coast region, this locality included Tewantin, Noosa Heads, and Coolum. According to the report, Tewantin already provided hotel accommodation, and offered safe swimming, boating and fishing. The attractions of Noosa Heads were considered to be the combination of the mouth of the River, the coastal area, and the National Park. Although there was some camping accommodation provided, there was seen to be an undersupply. Coolum Beach was considered a potential development site. In all three areas, the need for quality accommodation to cater for the interstate or international market was noted (QTDB, 1947).

4.4.6 The 1950s

In 1949 a change of Federal Government resulted in the lifting of the severe restrictions imposed during the war. The limits placed on imported commodities eased, the restrictions imposed on tourists' travelling allowances were reduced, and the closing time of hotels changed from the war time 6pm to 10pm in the various states over the following 20 years (Barker, 1992). This was the beginning of an economic boom that was to last through the 1950's (Chambers, 1999; Hancock, 1999). By the mid 1950s unemployment was no longer a problem and full employment was expected to continue (Fraser, 1993). Moreover, the political stability of the 1950s and 1960s resulted in strong investment from Britain and the US (Chambers, 1999).

The population of Australia increased, predominantly through large-scale Government encouraged migration, including British ex-servicemen, Europeans, and refugees from the communist countries. This resulted in an increasingly assertive multicultural minority (Mason, 1983; Chambers, 1999). A significant effect of these ethnic communities was the change in traditional eating and drinking habits. 'Eating out' was uncommon in the 1950s, but with the opening of numerous and varied restaurants, tradition changed. Additionally

wine became a regular addition to a meal, and public festivals became popular (Mason, 1983).

Changes to beach based activity during the 1950s were the appearance and subsequent banning of the bikini, and the introduction of the Malibu surfboard (Barker, 1992). Away from the beach, National Parks continued to be established.

During this decade Ansett took over ANA, and Qantas used its first 707 jet aircraft and inaugurated a round-the-world service (Barker, 1992). The changes in the economy and reliability of the jet airliners resulted in a significant increase in medium to long haul travel (Richardson, 1999).

The other transport related changes were the building and upgrading of roads, and the increasing use of the motor car, which dominated domestic travel. In parallel, motels, caravan parks, and camping grounds spread around the country (Richardson, 1999). During the 1950s the motel, as a new form of accommodation, became established. There were over 270 motels Australia-wide by 1960. Queensland became the motel capital of the country with the main focus on the Gold Coast, as 36 of the State's 59 motels were located there (Davidson & Spearritt, 2000). Most motels were single storey and build around a courtyard where the cars were parked. The main windows usually overlooked this car park rather than the countryside, thereby not taking advantage of their often superb locations. An advantage of these new motels over the existing hotels and guest houses was that they usually charged per room rather than per person, and were therefore economical for families (Davidson & Spearritt, 2000).

By the 1950s there was a decline in the role of the state tourist bureaus due to the rapid growth in retail travel agencies. Additionally the publication of an Australia-wide accommodation directory by the motoring organisations in the late 1950s, in effect replaced the guides supplied by the state bureaus (Davidson & Spearritt, 2000).

In the post-war years Noosa, and particularly Hasting Street, increased in popularity as a holiday destination. At that time Hastings Street had a caravan park at each end, and a series of mismatched houses, tourist accommodation, shops and vacant lots between them (Gloster, 1997). The Noosa area was first promoted as a tourist destination in 1957 with the

production and distribution of a brochure by the Tewantin-Noosa Chamber of Commerce (Edwards, 2001).

Development of T.M. Burke's beach estate, at what is now Sunshine Beach, had been on hold since 1935. In 1951 his son reviewed the situation and by the end of the decade had won the tender to extend the coastal road south to Coolum and build three bridges, in exchange for the lease of extra crown land south of Sunshine Beach. A second lease was also granted by Maroochy Shire for the section of land over the shire border. This lease was under the jurisdiction of the Crown Land Development Act of Queensland that provided a framework for this type of agreement, the pattern of which had been set earlier in the century. This scheme was being used to build all the sections of the coastal highway from Caloundra to Noosa as the Government, while promoting progress, could not afford to finance the road work. The first stage of the new coastal road, from Noosa to Coolum opened in 1960 (Edwards, 2001).

By 1950 the commercial centre of Maroochydore had shifted from the River Esplanade to the Ocean Esplanade (Maroochy Shire Library Service, 1994). In 1958, the beachfront national park, which extended from the north of the Maroochy River up to just south of Mt Coolum, was extinguished by the State Government. This was to allow for the Maroochy Airport, an adjacent high rise hotel and the residential beachside suburbs of Marcoola and Mudjimba (Gloster, 1997). The need for a larger airport was due to the growth of air traffic and the introduction of larger planes (Maroochy Shire Library Service, 1994).

4.4.7 The 1960s

World tourism expanded during the 1960s as Europeans began to travel further and those in developing countries began to travel internationally. After 1967 the foreign travel policy of Japan was relaxed and, when combined with the 'economic miracle' of Japan's growth, outbound travel began to grow (Prideaux, 1995; Go, 1997). Additionally the development of wide-bodied planes resulted in increased capacity and decreased airfares. According to Go (1997) the 'distance' limitation in travel to Australia had been significantly reduced. However by the mid 1960s the domestic market still accounted for 95 percent of tourism within Australia (Davidson & Spearritt, 2000).

In 1964 the Australian National Travel Association (ANTA), which began in 1929 with a general charter for promoting Australia, commissioned two New York consultancy firms to assess the nation's travel and tourism industry. The consultants assessed the state and territory tourism bureaus, concluding that they provided appropriate promotion and sales within Australia but individually were not and could not effectively promote overseas. They recommended the establishment of a national body to coordinate the industry and promote Australia internationally. This resulted in the creation of the Australian Tourist Commission (ATC) in 1967 for 'the encouragement of visitors to Australia, and travel within Australia, by people from other countries'. The coordination of the development of tourism attractions and facilities remained with the individual states and territories (Davidson & Spearritt, 2000).

In 1957 a Country Liberal Government was elected in Queensland after 25 years of Labor. At this time the vast majority of Queensland land was in various leasehold titles. By the end of the 1960s there were considerable changes in the land laws with land grants and free holding being used as development tools.

The State Tourist Bureau of Queensland began promoting the Sunshine Coast region in 1962, with the advent of the 'three-day scenic Sunshine Coast tours' (Edwards, 2001). To provide a central booking agency for the Noosa Shire, Noosa Tourist Accommodation was formed at the end of 1964, continuing to operate until 1972 (Edwards, 2001). At this time the 'Sunshine Coast' was becoming the official name for the area. As a result a partnership was established in 1967 between the three Councils and the private sector for a regional tourism marketing body, the Sunshine Coast Promotion Bureau (Prideaux & Cooper, 2002).

During this decade the aeroplane replaced the train as the main form of long distance mass transportation. The phenomenal increase in car ownership further resulted in the declining patronage of the railways (Davidson & Spearritt, 2000). On the Sunshine Coast, the Maroochy Airport was officially opened in 1961 (Maroochy Shire Library Service, 1994). The airport was owned, operated, and managed by the Maroochy Shire Council (Ralston, 2001). The name was later changed to the Sunshine Coast Airport (Maroochy Shire Library Service, 1994).

This decade saw increasing numbers visiting national parks and from 1967 the state level national park services began to be established throughout Australia (Davidson & Spearritt, 2000). In parallel environmental concern accelerated during the mid 1960s, as discussed in Chapters One and Two. In Queensland conservation issues included the protection of the Great Barrier Reef and the Cooloola beach area from mining (Hundloe, 1985).

The 1960s saw the development of a new beach culture. The surfboarding craze expanded with the establishment of small surfboard manufacturers, surf movies, an Australian winning the 10th international surfing championship, and the Beach Boys topping the music charts. In an era of full employment temporary jobs were readily available ensuring that ‘surfies’ and ‘surfie chicks’ could maintain their travelling lifestyle. The established surf clubs did not approve of the new craze and the traditional yellow and red flags began to divide the swimmers and bodysurfers from the board riders (Davidson & Spearritt, 2000).

By the late 1960s lightweight nylon tents, with aluminium or fibreglass poles, predominantly from North America, arrived on the Australian market. Mesh screens were added and the tents became compact enough to fit easily into the boot of a car (Davidson & Spearritt, 2000). Caravan parks and camping grounds were increasing in number and the facilities provided improving. These parks became an integral part of the economy of the coastal settlements (Davidson & Spearritt, 2000).

Due to the informal use of Noosa Woods as a camp ground, the Woods were officially changed to incorporate fee-paying camping in 1963. Progressively, the Woods were cleared for extra camp sites, which generated more funds for the Noosa Council. This was opposed by the Noosa Park Association, which continually tried to persuade the Council to regenerate the Woods (Gloster, 1997).

The Noosa Parks Association had been formed in 1962 by Dr Arthur Harrold and a group of like-minded individuals. This was the first community-based conservation group in Queensland. Their initial aim was to prevent the proposed road around the Noosa National Park, from Noosa Heads to Sunshine Beach. At that time, the National Park, which had been established in 1939, was a small 245 hectare parcel of land. Although appearing to extend to the coast, it was actually surrounded by potential roads and development sites. By conducting a large-scale community awareness program the Association was able to extend

the Park to the coastline in 1964, despite the opposing campaign conducted by T.M. Burke, the major developer with land at Alexandria Bay, in conjunction with the Council and some of the Noosa business sector (Gloster, 1997).

The coastal towns on the Sunshine Coast had remained small resort towns operating as centres for local agricultural produce until the 1960s (OESR, 2001). Growth from the 1960s on was rapid, with the acceleration in the development of residential areas, retirement settlements, and resorts and other tourist facilities (OESR, 2001). By the 1960s, the beginning of the development projects that were to change the Sunshine Coast's character had begun (Holthouse, 1982).

At this time Noosa was like many other quiet coastal towns, visited by families, surfers, fishermen, water-skiers, and boating enthusiasts. The combination of the limited accommodation and the increasing number of visitors from the southern States caused many to purchase their own holiday house, or built flats or motels (Edwards, 2001).

At the start of the 1960s the towns in the Noosa Shire each had their own character, determined partially by their use. Tewantin was the shopping and business hub, Noosaville the fishing village, and Noosa Heads the beach resort. The residential areas were mainly in Tewantin and Noosaville. At that time the bottom of Noosa Hill, later to become known as Noosa Junction, was a dirt road through the bush, linking Tewantin Road with the new coastal highway. The first business at the Junction was a fish and chip shop, which began operation from a tin shed in 1963. Over the following years a number of businesses catering to the traveller were established, including service stations, unit and motel accommodation, a café and some shops (Edwards, 2001).

With the extension of the coastal highway, Peregian, at the southern end of the Noosa Shire, had grown into a small community. In 1962, electricity was connected, and a roadhouse and restaurant opened. Two years later, a Surf Lifesavers Clubhouse was erected, and swimming and wading pools built. By 1967, there were a total of 32 houses. In comparison, there were 85 dwellings in the older Sunshine Beach estate, 101 in Noosa Heads, and 430 in Noosaville (Edwards, 2001).

During the early 1960s, it became apparent that Main Beach at Noosa Heads had receded significantly over the past 20 years and the trend did not appear to be changing. 'Protection' of the beach resulted, with the construction of a stone wall in 1964. Following further sand loss, a more substantial rock and boulder wall was constructed five years later. This retaining wall was to protect the properties that had been built on the foreshore (Edwards, 2001).

Noosa was not the only beach suffering erosion. The cyclone season of 1967/68 had affected many South East Queensland beaches. In a bid to protect the beaches, the State Government introduced the Beach Protection Act in 1968. This primarily protected the foredune area of beaches that had not already been built upon (Edwards, 2001).

From the 1960s to the early 1980s, the Noosa Council encouraged development along the coastal strip, as the extra rates generated could be used for the building of inland roads. In 1969, the Council approved an eight storey 'integrated resort' unit development for the ocean side of Hastings Street. This was the first submission of a high rise application in Noosa. The approval was granted, despite opposition from a community campaign led by Marjorie Harrold. At that time there was no town plan for Hasting Street and therefore no limit to what could be approved.

Subsequently a town plan was developed and a limit of three storeys established for the ocean side of the street. However, no height restrictions were established for the non-ocean side of the street. The approval for the eight storey project eventually lapsed due to the financial difficulties of the developer (Gloster, 1997). An extension was not granted by the Council on the basis that the foreshore was part of the newly defined Beach Erosion Control Area under the Beach Authority Act and the proposed type of development was no longer considered appropriate (Edwards, 2001).

4.4.8 The 1970s

In the 1970s, under the Federal Governments of Gough Whitlam and Malcolm Fraser, migration from all parts of the globe continued. Politics during the 1970s were also driven by issues of the 1960s, including the environment, feminism, sexual liberation, and indigenous rights (Manne, 1999). Money was spent extensively in a bid to solve national

problems and assist international situations, creating economic difficulties at a time when many economies in the developed world were already experiencing ‘stagflation’, which implied stagnant economic growth combined with increasing unemployment and rising inflation (Chambers, 1999). In the second half of the decade the Fraser Government aimed to generate business confidence and reduced the portion of a company that needed to be Australian owned, in order to attract foreign capital (Chambers, 1999).

By 1970 Joh Bjelke-Petersen had become Queensland Premier, a position he retained until his retirement in 1987 (Barker, 1992). In order to make the State the ‘money-capital’ of Australia, death duties were abolished, stamp duties cut, payroll tax exemption levels increased, land taxes reduced, other state taxes controlled and land freeholding accelerated. This was part of the ultimately successful plan to induce large-scale interstate and international investment in the progress and development of Queensland (Walter, 1990). The reaction to this aggressive development policy was epitomised by the ‘See Queensland first, before Joh sells it’ bumper sticker (Stuart, 1985). Queensland in the 1970s experienced a polarisation between the pro-development government and the growing community concern for the natural environment. By 1971 individual conservation groups had formed the Queensland Conservation Council. One strategy utilised by the conservationists was to play the State Government off against the Federal Government. For example the approval and control of mining is a state responsibility, but as the export of minerals is a commonwealth function, the federal government prevented sand mining on Fraser Island by withholding export licences (Hundloe, 1985).

Opposition to sandmining had grown through the 1960s, with mining occurring on the Sunshine Coast at North Shore, north of Tewantin. In the early 1970s, applications were submitted for the mining of Sunshine and Peregrian Beaches. Despite being on different sides on the Noosa National Park issue during the 1960s, T.M. Burke, the Noosa Shire, the Maroochy Shire, the local residents and the environmentalists, all opposed the granting of a dredging lease. The mining application was ultimately refused by the Minister for Mines on the basis of ‘public interest’ (Edwards, 2001).

Another conflict between development and conservation was occurring over the issue of canal developments. In 1972, backed by the State Government and the Noosa Council, the wetland ecosystem of Hays Island was transformed into Noosa Sound. The development

incorporated the clearing of mangroves, land filling, and the construction of three bridges. Four years later surf broke over the estate. To protect Noosa Sound, the developer, Noosa Council, and the State Government contributed to the creation of a new Noosa Spit, effectively destroying the natural river mouth and bar system (Gloster, 1997; Edwards, 2001). One effect of the Hays Island development was to harden public feeling against any further canal developments in Noosa (Cato, 1989).

In 1973, the T.M. Burke company purchased non-waterfront land in Noosaville for a canal development, Noosa Waters Estate. Opposition to the proposal grew over time, with issues being raised about pollution, flooding, drainage, and the potential of further canal developments in Noosa. In 1978, the plan was changed to a navigable lake rather than canals as this changed the approval and relevant regulations from the state level to the local authority. The following year, the company was bought out and the plan continued to be reviewed and resubmitted (Edwards, 2001).

In the Maroochy Shire, the first canal developments were proposed in the mid 1970s, ultimately resulting in 'Maroochy Waters' and 'Emerald Waters'. Controversy reigned as the local population expressed concern over the environmental changes, citing American examples. Ultimately the Maroochy Council determined that the canals were required because of the growing population, as the canals would reduce development along the coastal and river esplanades (Maroochy Shire Library Service, 1994).

The world recession in the mid 1970s significantly affected international visitor numbers to Australia, with total numbers down from 1974 for both 1975 and 1976. The main source markets impacted were New Zealand and North America (QTTC & Boeing, 1981). This was indicative of the increasingly competitive nature of the maturing tourism industry. "The arrival of the jumbo jets and the giant hotel chains inevitably led to declining profit margins, desperate international competition and losses" (Turner, 1976 p.15). However international travel generally continued to increase despite the occasional lowering of the growth rate for the energy crisis in 1973/4 and 1979, and the economic recession of 1981 (Go, 1997).

Interestingly, visitation from the United Kingdom and European markets was largely unaffected by the economic recession of the 1970s, presumably because of the high numbers visiting friends and relatives (PLI & PWA, 1980). During the 1970s international flights to

Australia increased. In 1973, the first direct flight between Japan and Australia began operation, and by the end of the decade Queensland was serviced by five international airlines, totalling 34 flights each week (Rider Hunt and Partners, 1983, 1991).

Domestically, Sydney's Kingsford Smith International Airport, Australia's first legal casino in Hobart, and the Sydney Opera House all opened in the early 1970s (Barker, 1992; Davidson & Spearritt, 2000).

On the Sunshine Coast, the coastal road ran from Caloundra all the way to Noosa by the beginning of the 1970s. In 1975, the Main Roads Minister gazetted this coastal Nicklin Way – David Low Highway as a main road. As a result, only 10 percent of subsequent maintenance costs were to be paid by the Local Shires. In addition, the Minister announced that the road from Eumundi to Noosaville would be upgraded, as this provided a shorter link to the coast from the inland highway (Edwards, 2001).

During this time the old resorts along the coastal road were being replaced, and land values were escalating. Lagoon House, on Hastings Street, was demolished to be replaced by a shopping arcade. The beach, stretching south from Noosa to the Maroochy River, was filling up with the resorts of Sunshine, Marcus, Peregian, Coolum and Ninderry Beaches. High-rises had been established at Maroochydore and Alexandra Headlands, and town-houses were perched out on Point Cartwright. The ginger factory at Buderim was moved to Yandina, as a town-house development required the land. Also in the hinterland, the inland road linked the towns of Mapleton, Flaxton, and Montville. The second stretch of coast from Point Cartwright south to Caloundra was also filling with the townships of Buddina, Warana, Bokarina, Wurtulla, and Currimundi. In Caloundra, the Westaway Towers rose up from their rocky hilltop location (Holthouse, 1982; Jenkins, 2001).

Into the 1970s, the growth of the residential areas of Tewantin and Noosaville continued, with tourist accommodation and private dwellings increasing at Noosa Heads. Sunshine and Peregian Beaches were developing both residential and holiday accommodation. Noosa Junction, at the bottom of Noosa Hill, was the last area to be settled (Edwards, 2001). The Noosa Shire Division 4 Town Planning Scheme was gazetted in 1973. This continued to support concentrated residential and accommodation units, hotels, and 'communal premises' for the Tewantin and Noosa Division. However high density proposals could be rejected if

the development was considered to have a negative affect on the environment, traffic, or public utilities (PLI & PWA, 1980).

By the beginning of the 1970s, two Victorian families had purchased the Pine Trees Caravan Park, which occupied two acres of land between Hastings Street and the Noosa River. This company built a Mobile Service Station on Hastings Street, and in 1973, a six unit motel, which was expanded the following year to 32 units. The motel incorporated a restaurant and a few shops, and was affiliated with the Flag Motel Group. An adjacent block was purchased in 1975 and 14 units erected. Another resort building was added in 1978, with 28 more units and a number of commercial premises (PLI, 1980).

In 1973 Butts' Shopping Town was opened, later to be renamed Big Top Shopping Centre. It was built by the grandson of the owner of the original Maroochydoore store (Maroochy Shire Library Service, 1994). The following year the Noosa Heads Surf Life Saving Club opened its modern clubhouse, complete with a liquor license (Cato, 1989). By 1977, Kawana Estates, in the Landsborough Shire was under way (Jenkins, 2001), and in 1979, the new terminal at Maroochy Airport opened (Maroochy Shire Library Service, 1994). Also in 1979, the first King of the Mountain race was held in Pomona. The race has been held every year since (Edwards, 2001).

By the early 1970s state and territory tourist bureaus were competing for the role of booking agent with both the increasing numbers of commercial travel agencies, which had spread to most shopping areas, and the motoring organisations, which controlled the accommodation guide market (Davidson & Spearritt, 2000). To encourage travel to the Sunshine Coast, representatives from the three shires flew to Sydney in the early 1970s. The discovery that people wanted package deals resulted in inclusive deals, incorporating airfares, transfers, and accommodation for seven, ten, or fourteen days. East-West Airlines, which had only begun direct flights from Sydney to Maroochydoore in 1970, increased the number of flights to cater for the extra bookings. The number and type of packages offered expanded as Traveland and Qantas became involved in the second half of the decade (Edwards, 2001).

The role of the regional marketing body, the Sunshine Coast Promotion Bureau was expanded to incorporate a tourism development focus in 1976, and was renamed the Sunshine Coast Tourism and Development Board (Prideaux & Cooper, 2002).

In 1979 the Queensland Tourist and Travel Corporation (QTTC) was formed, as a replacement of the Department of Tourism, taking control of the fourteen Queensland Government Tourist Bureaus (Williams, 1980). The primary functions of QTTC were to promote and market tourism and travel, make tourism and travel arrangements, provide tourism and travel information services, encourage the development of the tourism and travel industry, and advise Ministers (Queensland Government, 1979).

Also in 1979, recognition of the potential income and employment offered by the tourism industry, resulted in extra assistance from the Federal Budget. Funding for the ATC was almost doubled for the 1979/80 year and a system of deprecation introduced for tourist accommodation providers constructing new or extended facilities. The focus of the overseas marketing by the ATC were to be the source markets of Japan, North America, and Britain (Rider Hunt and Partners, 1979).

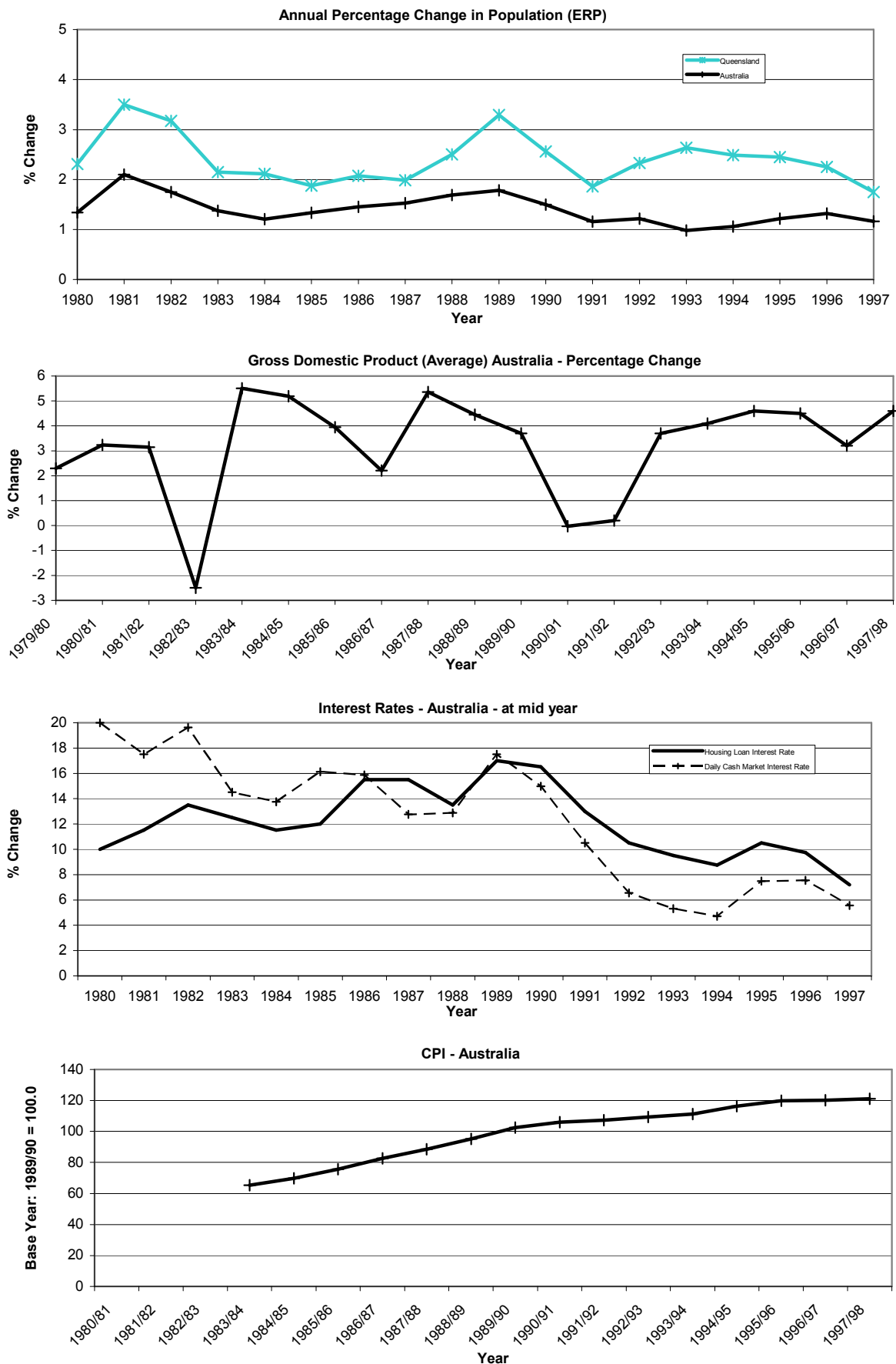
4.5 Development of Tourism in the Case Area: 1980 – 1997

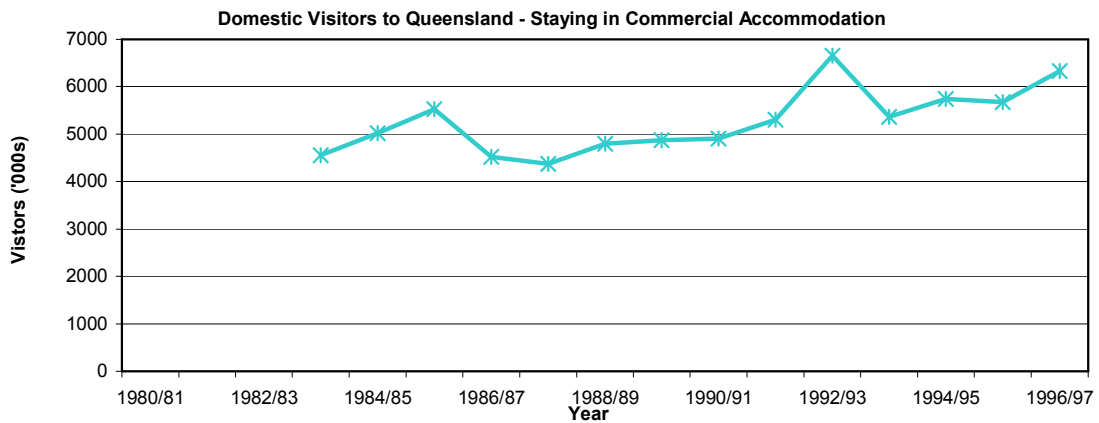
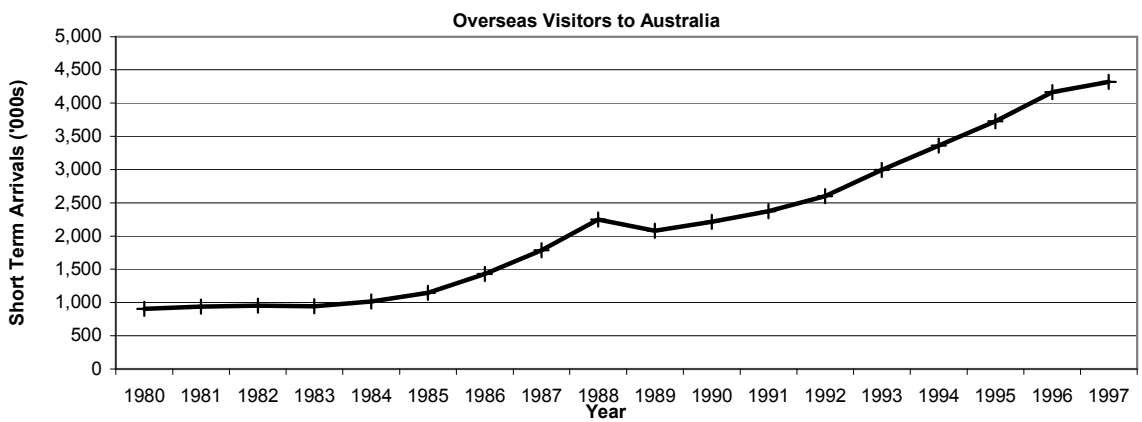
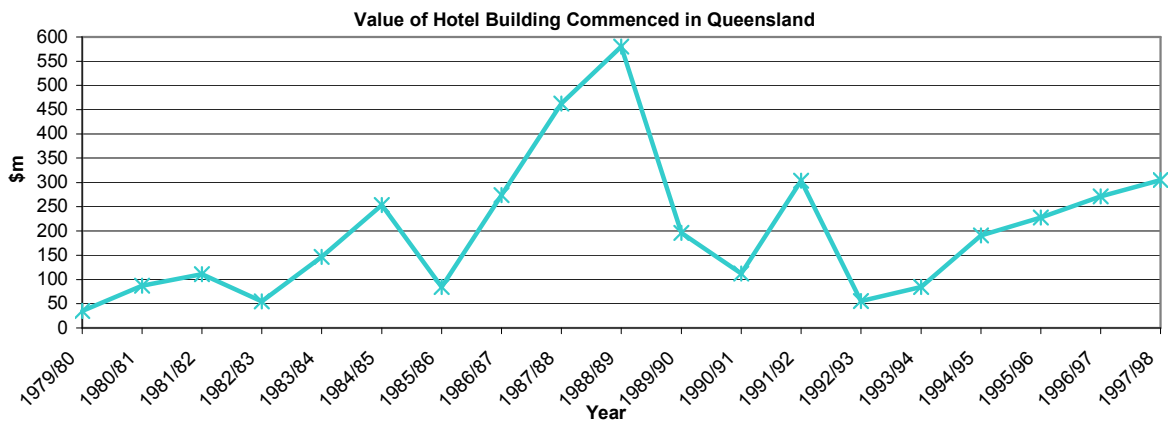
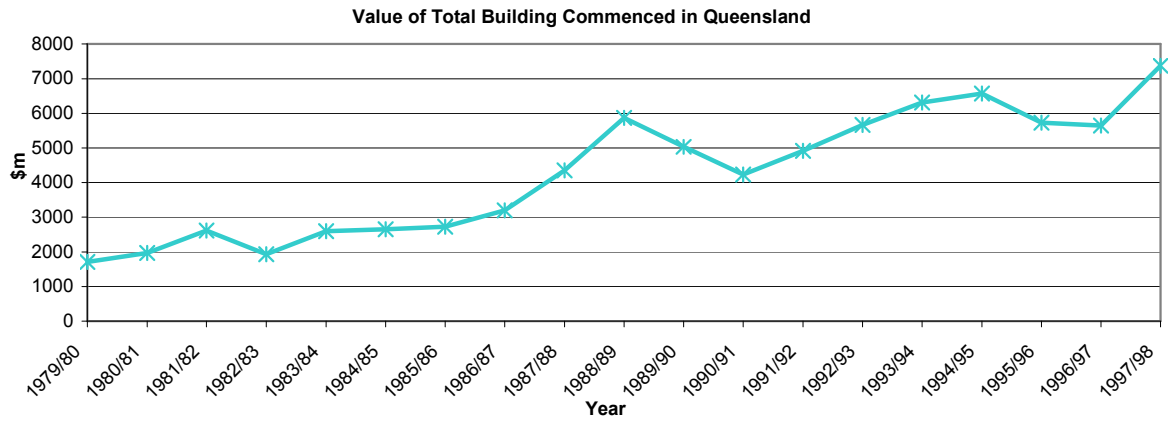
This section summarises the general development and the growth of tourism within the study area, from 1980 to 1997. This summary aims to highlight significant people, policies, developments, and events that have affected tourism within the case system. As there has been significant tourism development since 1980, it is possible to examine periods of development and decline, both gradual and sudden, as well as periods of equilibrium.

The development of tourism in the case system, from 1980 to 1997, is grouped into six phases; Development Boom and Bust (1980-1982), Recovery Period (1983-1985), Tourism Boom (1986-1988), The Recession (1989-1991), Recovery Period (1992-1994), and the Unstable Period (1995-1997). The three-year phases are not arbitrary but were determined by the economic and political climate, and the extent of general development and tourism growth exhibited during that time (Figure 4.4 and Figure 4.5)¹⁶.

¹⁶ Note - For variables that are measured in Australian dollars, such as the value of building, visitor expenditure and hotel sector takings, all have been converted to incorporate the CPI adjustment (base financial year of 1989-1990).

Figure 4.4 Changes in Key Growth Indicators between 1980 and 1997.





		Recession		Recovery			Unstable				
		1989	1990	1991	1992	1993	1994	1995	1996	1997	
International Situation/Events				Gulf War	Growth in international travel by Asians						Asian Economic Crisis
International Visitors to Australia				Change from Traditional Markets to Asian Nations			Australia No.1 Preference for Japan				
Federal Ministry	Bob Hawke (cont)	Paul Keating									John Howard
Federal Government		Airline Deregulation	Department of Tourism	National Tourism Strategy Aviation Policy Reforms	Tourism Policy				Department of Industry, Science & Tourism		
Federal Level	Pilots Dispute	Bankrupt Businesses	Economic Recession	Increasing Trade with Asia Housing-led Recovery	Tourism Forecasting Council				Economic Reform, Deregulation, Privatisation		
National Tourism & Events		Drop in Airfares	Rise & Fall of Compass	Qantas Takeover of Australian Airlines	Rise & Fall of Compass II			Qantas Floated			
State Ministry	R. Cooper	Wayne Goss									Bob Borbidge
State Government					QTTT Overseas Review	Building Units and Group Titles Act		Zero Economic Growth		QTTT Promotes Queensland Destinations	
State Level		High Population Growth						Intl Airport, Quay West, Novotel, Treasury Casino			
State Tourism & Events				Population Passes 3 Million				Exhibition/ Convention Centre open			
				CEDA Report on Qld Tourism	Lions Conference in Brisbane						

Information for this section has been sourced from various government reports, industry reports, development reports, books, and journals. In order to provide a context for the building activity and the development of the study area, both in general and for tourism specifically, the Rider Hunt reports have been utilised. These development reviews provide understanding of the building sector, the economic climate, investment, political change, and tourism development on a quarterly basis, as seen by Rider Hunt and Partners. Although the initial report was for the Gold Coast, the report was expanded to include the Sunshine Coast from 1980, becoming the Queensland Development Report in 1988. This type of detailed and regular information on the ‘current’ situation has been invaluable in this analysis. However it is important to note that these reports aim to provide information to assist development. Wherever possible this information is supported, or questioned, by additional sources.

4.5.1 Development Boom and Bust: 1980 - 1982

In 1980, Queensland was experiencing a high rise development boom. This building frenzy, most evident on the Gold Coast, had begun in 1977 and reached its peak in 1981 (Figure 4.6). The boom was partially due to the abolishment of death duties in 1977 by the state government, in conjunction with lower interest rates and rising inflation (Figure 4.4) (Jones, 1986).

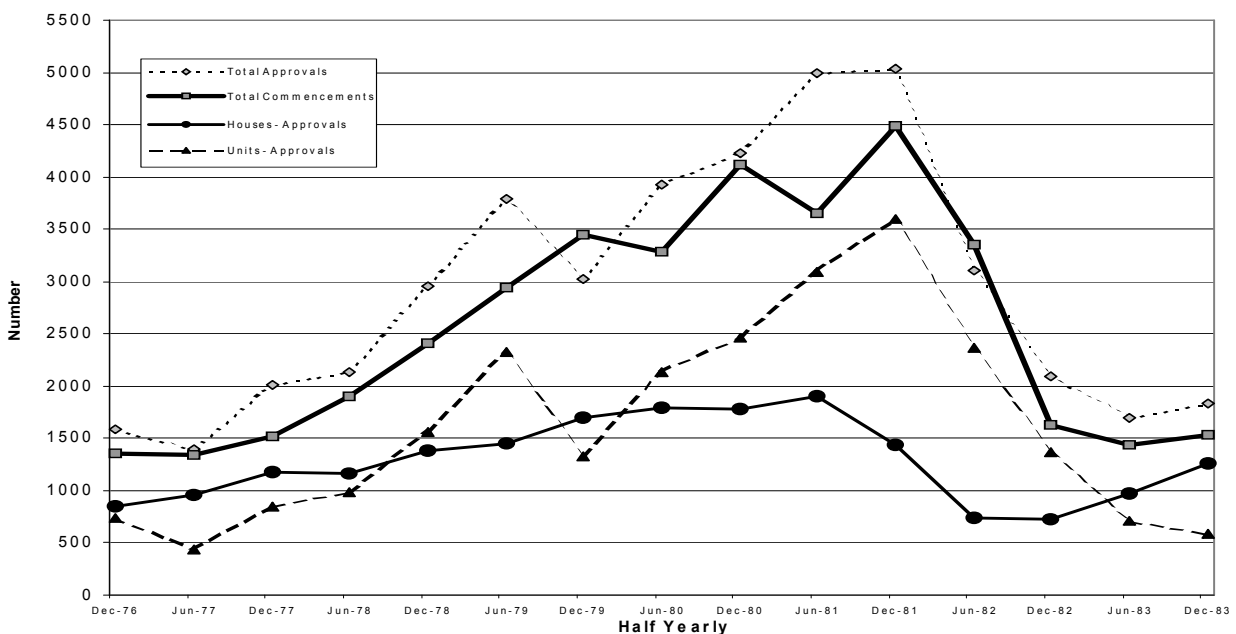


Figure 4.6 High Rise Building Boom and Bust on the Gold Coast.
 As shown by the number of new dwelling approvals for houses and units and the number of commenced developments 1977-1983 (ABS 8731.3 Building Approvals, Queensland).

The crash in early 1982 was due to rising interest rates, increased construction costs, and the lowering of death duties in other states (Jones, 1986). After a number of years of national economic growth under the Fraser Government, the financial year of 1982/83 recorded negative growth of 2.5 percent. This economic predicament was not isolated to Australia, with 1982 considered one of the worst years internationally since the depression of the 1930s (Rider Hunt and Partners, 1983).

By 1982 the high population growth of Queensland, when compared to the other States and Territories, had been recognised. The increasing population was seen by Premier Bjelke-Peterson as a reflection of the perceived potential of Queensland growth, and as a forerunner of new businesses, ideas, opportunities, investment and development (Rider Hunt and Partners, 1982). This was further enhanced by the successful holding of the 1982 Commonwealth Games, which placed Brisbane 'back on the map' (Garnsey, 1984; Sutton, 1984; Barker, 1992).

The potential in Queensland had been realised but much of the growth was in the planning stages, and existing development was often the culmination of a number of individual projects. This was particularly evident for tourism. At that time tourism in Queensland was considered highly competitive, inconsistent, uncoordinated, and lacked an 'industry' identity (PLI & PWA, 1980).

The first 'Boeing Report', in 1981, provided an understanding of the potential of tourism within Queensland, and the corresponding need for development and marketing to achieve this (QTTC & Boeing, 1981). The report considered Queensland to be in the "initial stage of tourism expansion" as it was "not a well-known travel destination", although it was perceived to have "the greatest untapped potential of any world tourist market" (QTTC & Boeing, 1981 pp.3&9).

This Boeing Report provided forecasts for the expected level of domestic and international visitors to Queensland for 1983 and 1985 for two scenarios, a 'Natural' or 'Baseline' level of annual growth, and an 'Accelerated' level that could occur if an 'aggressive tourism posture' was adopted (QTTC & Boeing, 1981). The predicted number of international arrivals to Australia for 1983 and 1985 have been compared to the actual visitors, as recorded by the Australian Bureau of Statistics (ABS) (Figure 4.7). This shows that

although the forecasts were not achieved, the 1983 prediction was met by 1985, and the 1985 prediction was exceeded by 1986.

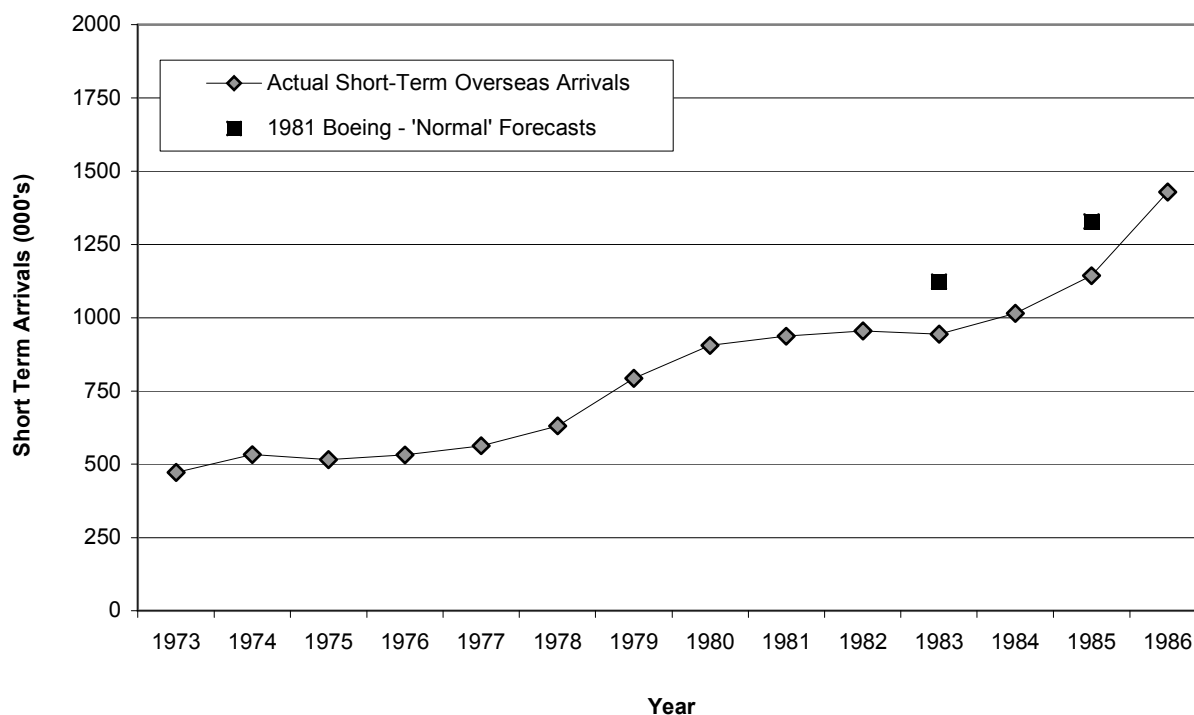


Figure 4.7 International Arrivals to Australia.
Actual Visitor Arrivals (ABS 3401.0 Overseas Arrivals and Departures) and the 1981 Boeing predictions (QTTC & Boeing, 1981).

Growth in international visitor numbers to Australia in the late 1970s was greater than the world trend. This growth was attributed to cheaper airfares and an increased level of marketing and promotion. The main sources of international tourists during this period were New Zealand, North America, United Kingdom/Ireland, Continental Europe, and Japan.

Also at the National level, the passing of the two airline agreement in 1981, resulted in the reorganisation of the services of Ansett and TAA and a significant increase in the price of airfares (Williams, 1980; Jones, 1986; Barker, 1992; Atherton & Atherton, 1998; Richardson, 1999).

At this time, the domestic market still accounted for more than 90 percent of all visitors, with 80 percent of domestic trips originating in the same state as the destination. However, the focus of Government was on international visitors as earners of foreign capital (PLI & PWA, 1980).

4.5.1.1 The Sunshine Coast - Development Boom and Bust: 1980 - 1982

By the beginning of the 1980s the Sunshine Coast region had changed from a quiet rural area based on primary industries to a mainly urban environment focused on the leisure industry (Edwards, 2001). In the expanding resort towns, entertainment focused around surfing, fishing, golf, river cruising, and dining, but with little of the nightlife found on the Gold Coast (Holthouse, 1982). Despite this transformation, the rural history of the region was still in evidence. In Noosa Shire, the Council was still located in Pomona, a small inland rural town.

In the Noosa Shire, Noosa Junction was overtaking Tewantin as the commercial centre (Edwards, 2001). Hastings Street had also been transformed from the pre-war beach architecture to modern brick and tile buildings, although it still maintained its reputation as the one 'party' street (Gloster, 1997).

Part of the reason that Queensland was perceived as being a progressive state in the early 1980s was the building boom taking place on the Gold and Sunshine Coasts (Figure 4.8) (Garnsey, 1984). Unlike the Gold Coast the abolishment of death duties in Queensland in early 1977 took a year to affect the level of investment in residential building on the Sunshine Coast. The new demand for residential accommodation resulted in increased approvals, but the limited workforce spread the commencements through into the early 1980s (Rider Hunt and Partners, 1980).

As a result of the building activity the Sunshine Coast was transformed from a "quiet, out-of-the-way holiday spot for the knowledgeable few....(to a) boom area with frantic residential and commercial development leaping ahead as fast as the bulldozers could push aside the coastal scrub" (Toghill, 1982 p.23). However, it was thought at that time, that the development was more 'tastefully executed' than in other locations because of the control exercised by the local governments (Toghill, 1982).

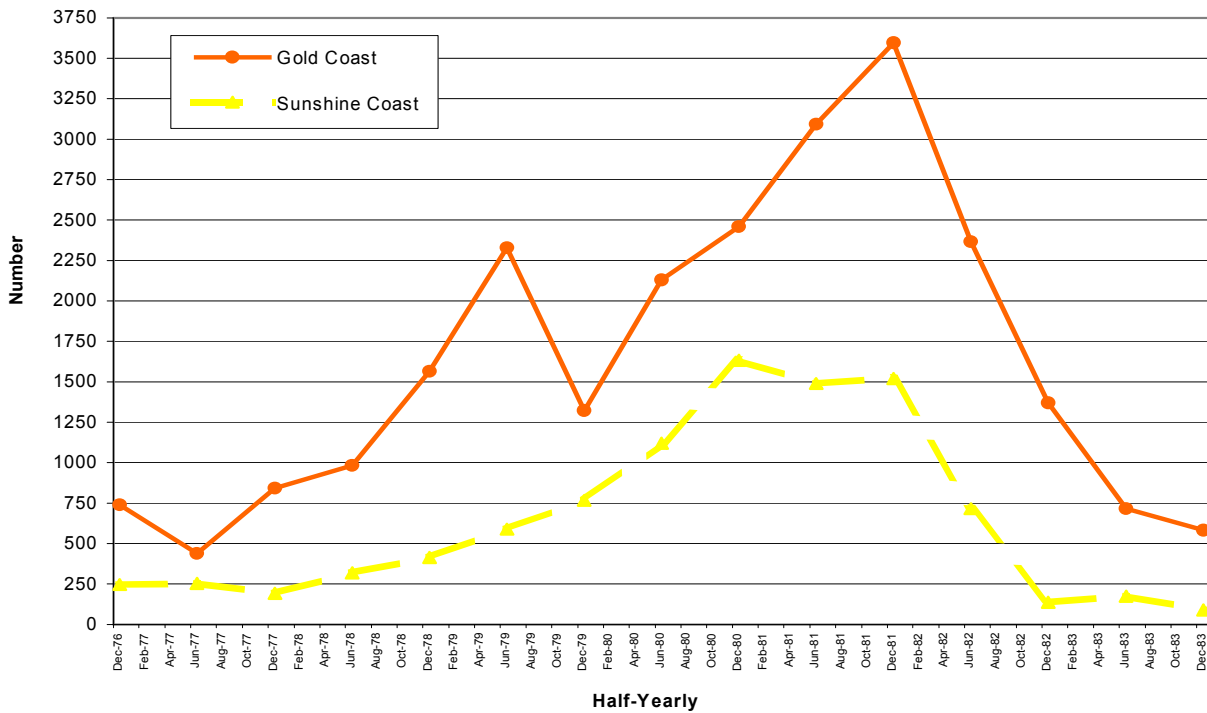


Figure 4.8 Unit Approvals on the Gold Coast and the Sunshine Coast. Comparison of the Unit Approvals on the Gold Coast and the Sunshine Coast 1977-1983 (ABS 8731.3 Building Approvals, Queensland). Illustrates the extent of the rise and fall of the unit building boom of the early 1980s.

Even with the increasing cost of construction, the Landsborough Shire was catching up with the development boom and unit approvals did not drop there until 1982. ‘Caloundra has come of age’ announced the Rider Hunt Report. Further north, development within the Maroochy Shire had levelled off (Rider Hunt and Partners, 1981). This was partially attributed to the height restrictions imposed at the end of 1980, which increased the cost of the land component (Rider Hunt and Partners, 1980). Developments such as Noosa Harbour had sold all components prior to completion despite the rising interest rates (Rider Hunt and Partners, 1981). There was however a considerable decline in development in the Noosa Shire, attributed to the relocation of the Shire Office, which created a processing backlog, and the conservation interests of the Noosa Council which attempted to minimise approvals (Rider Hunt and Partners, 1981).

In addition to the housing boom, the population of the Sunshine Coast continued the dramatic growth that had been occurring since the 1970s, with growth over 9 percent per annum for the first two years of the 1980s (Figure 4.9). The high population growth was still greater than the trends for new residential approvals, commencements, and sales, despite the building boom (Rider Hunt and Partners, 1981).

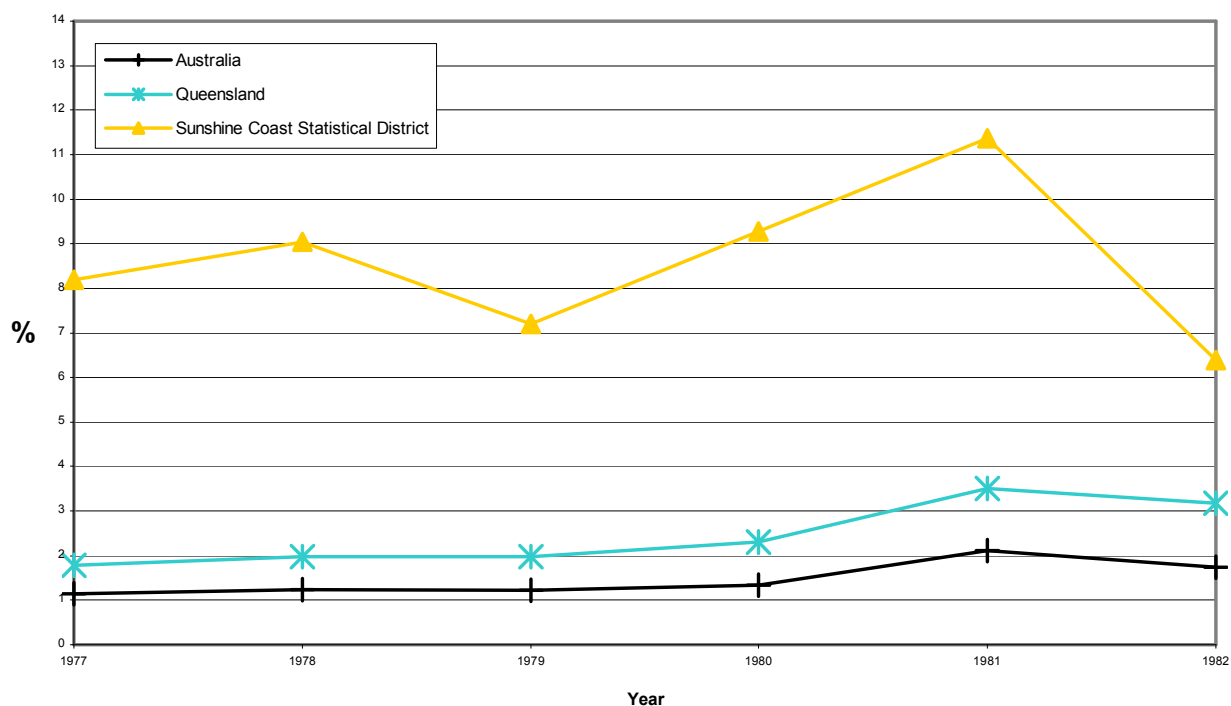


Figure 4.9 Annual Percentage Change in Population.
Comparison of the annual percentage change in population (ERP) for the Sunshine Coast, Queensland, and Australia 1977-1982 (ABS 3212.3, ABS 3202.3 & ABS 3218.0).

By early 1982, the previous two years of high demand had finally been met, heralding a drop in approval and commencement activity (Rider Hunt and Partners, 1982). The building bubble had burst and the following downturn continued for almost five years (Cato, 1989).

The beginnings of 'mass tourism' on the Sunshine Coast were evident in the early 1980s. The provision of new quality accommodation, and general tourist services and computer booking facilities were expected to attract the package tour operators with their large visitor numbers (Rider Hunt and Partners, 1981). In comparison to almost 3 000 hotel/motel rooms on the Gold Coast in early 1980, Maroochy Shire had 558 rooms, and Landsborough Shire 113 rooms (PLI, 1980). There was also significant tourism development planned, particularly for Noosa.

Noosa Holdings was aiming to expand its tourism facilities in Noosa Heads, changing the 'scale and character' of the destination and appealing to top market clientele (PLI, 1980). One of their proposals was to remove the council caravan park at Noosa Woods and upgrade the area to a naturally planned native parkland, in exchange for the opportunity to develop

an international hotel on Noosa Spit, located past the Woods. The long term plan was then to close the Woods off to the public, thereby providing a natural 'garden' for the use of their hotel guests (PLI, 1980).

The completion of this newly created Noosa Spit provided an opening for developers to utilise this prime, but unstable location. In addition to the plans of Noosa Holdings, a consortium proposed a development incorporating a deep water marina behind the Spit. Opposition by the Noosa Parks Association and the community assisted in its ultimate withdrawal (Gloster, 1997).

In the Noosa Shire a limit of six storeys had been established by the council, as a compromise between the developers aim for 12 storeys and the conservationists lobby for three storeys. As a result, numerous six storey buildings along the non-ocean side of Hastings Street were proposed and approved (Gloster, 1997). The number of developments approved by Noosa Council resulted in the forming of a concerned citizens group to protest over the number of multiple dwellings, particularly around Sunshine Beach, as the area did not even have sewerage (Cato, 1989). In the Maroochy Shire, another lobby group was vocally opposing high rise development. The situation was even more untenable as the development policies of council had not been clarified (Rider Hunt and Partners, 1980).

The results of the State Government's Coastal Management Investigation had been released in 1976. The recommendations supported the aim of the Noosa Parks Association to protect the strip of land between the existing coastal development and Lake Weyba. To this end, it had been recommended that any new arterial road between Noosa and Maroochy be located west of the lake. Despite this, the council agreed to T.M. Burke's plan to develop a town plan for the coastal strip, running south from Sunshine Beach to Peregian Beach. This in effect gave the developer the opportunity to pay for a town plan that would 'control' his development. However, by the time Main Roads announced this planned eastern route almost a decade had passed and an environmentally conscious Noosa Council had been elected. The council, supported by the Noosa Parks Association and the local residents, was able to have the route changed back to the inland side of the lake. This allowed for the ultimately successful lobbying of the Goss Government, by numerous forces, to have the coastal strip added to Noosa National Park (Gloster, 1997).

The proposed level of tourism-related development of the early 1980s was related to the building boom and was therefore significantly affected by the building bust. Although this boom and subsequent drop in building activity was not at the level experienced on the Gold Coast, the change in the building market prevented planned developments from progressing and businesses did fail. In Noosa Heads, the numerous six storey proposed developments along the non-ocean side of Hasting Street did not eventuate. In particular, the Noosa Holdings development group was declared bankrupt, thus ending their development plans (Gloster, 1997).

Although the 1979-1982 Noosa Council was considered by Rider Hunt and Partners (Rider Hunt and Partners, 1981) to have minimised approvals for conservation reasons, the council was generally perceived as pro-development (Gloster, 1997). In response 'The Residents' Team' was established and elected. They aimed to be "reform-orientated new councillors with strong conservation, town planning, design, and lifestyle protection priorities" (Gloster, 1997 p.15). They believed that Noosa could be both economically and ecologically sustainable. In the aftermath of the development boom, Hastings Street properties had been put back into the depressed market, and business confidence had plummeted. The newly elected council called for a workshop incorporating all the stakeholders. The input provided the base for the Hastings Street Development Control Plan (Gloster, 1997).

4.5.2 Recovery Period: 1983 - 1985

In addition to the collapse of the high rise boom and the economic downturn, the early 1980s had seen increasing unemployment, a drought affected agricultural sector, extensive bush fires, and the collapse of the mineral boom. Under these conditions the Federal Coalition Government was replaced in 1983 by Bob Hawke's ALP Government (Chambers, 1999; Macintyre, 1999).

By 1984, the effects of the Hawke Government were beginning to gradually change the economic environment of Australia, with a focus on deregulation, globalisation, rationalisation, and large-scale entrepreneurial businesses. The housing led economic recovery, assisted by the end to the drought, the drop in interest rates, and the jump in consumer confidence, resulted in positive economic growth.

The growth in the Australian economy was in the forefront of world recovery. Private sector business investment was positive, the employment situation was improving, and interest rates were starting to rise (Figure 4.4). This economic rate of growth although continuing was expected to slow down (Rider Hunt and Partners, 1985, 1986).

This period was the beginning of a new business era, with strong links between politics and the private arena. This affected tourism development, with the focus on corporate development, rather than small enterprises established by individuals (Richardson, 1999). One of Hawke's 'business mates' was Alan Bond, the entrepreneur behind the win of the America's Cup Yacht Race for Australia in 1983 (Norington, 1990; Stewart, 1994). Also in the public eye were business figures including Christopher Skase, who owned and developed the Mirage resorts at the Gold Coast and Port Douglas (Stewart, 1994).

The surplus of units from the boom period, combined with the growing global trend, resulted in the rise of timeshare accommodation. However the momentum was not maintained and the sector was in decline within a few years.

In 1983 the Hawke Ministry established the Department of Sport, Recreation, and Tourism. The new Federal Minister for Tourism, Mr Brown, was perceived as understanding the potential benefits of tourism and supporting its development (Rider Hunt and Partners, 1983).

At the State level, the collection of tourism-related data by the ABS and QTTC was revealing the economic benefits of tourism in Queensland. Further research into the visitor characteristics was seen by Mr Peter McKechnie, the Queensland Tourism Minister, as necessary to assist future planning and the tourist operators (Rider Hunt and Partners, 1984).

In 1983, Queensland also began actively promoting the State in the international arena, despite pressure to pool resources for national promotion. Queensland considered it was just 'tagged onto' the national campaigns, with the dominate focus on the southern States. In addition, delays in decisions at the Federal level reinforced Queensland's decision to conduct its own promotion (Rider Hunt and Partners, 1983).

Early 1984 heralded a slash in domestic airfares, with drops of up to 45 percent (Rider Hunt and Partners, 1983). Internationally two new multi-stopover airfares were introduced to encourage international travel to and within Australia. The existing domestic airfares had previously been seen as a discouragement for inbound tourists to leave the main arrival port of Sydney.

The new airfares were in conjunction with the advertising campaigns that featured Paul Hogan, encouraging Americans to 'Visit Oz' and Australians to 'See Australia First' and included the 'throw another shrimp on the barbie' advertisement (Rider Hunt and Partners, 1984; Richardson, 1999). This release of Paul Hogan and Crocodile Dundee in the mid 1980s had extensive exposure, with the initial advertisements in California resulting in an 80 percent increase in visa applications from the state by mid 1984 (Rider Hunt and Partners, 1984; Barker, 1992). In the three years to 1985 Australia had moved from the 49th preference for American tourists to number one (Rider Hunt and Partners, 1986).

Consequently, during this three year Recovery Period there were a number of factors which influenced arrivals to Australia by US visitors. These included the drop in airfares, new stopover airfares, the drop in the A\$ in relation to the US\$, significant promotional activity, and the winning of the Americas Cup by Australia. This corresponds with data on the change in the pattern of visitation of arrivals to Australia from the US during this 1983 and 1985 period (Figure 4.10). These changes were in addition to the expected natural increase in visitation forecast in 1981 by the Boeing Report (QTTC & Boeing, 1981), which accurately predicted the 1983 visitation level.

The US Dollar strengthened against the Australian Dollar in this three year recovery period. During the initial low growth period (1975-1983), the US\$ compared to the A\$, dropped from \$1.20 in 1975/6 to only 86c by 1983/84, reaching a low of 66c in 1984/85. Through the remainder of the growth period, and the subsequent drop and gradual increase in visitation, the US\$ has fluctuated between \$0.66 and \$0.79.

Partially due the increasing visitation from the US, Australia past the mark of one million international annual visitors in 1984 (Figure 4.7). At this time the other main growth market was Japan (Rider Hunt and Partners, 1985).

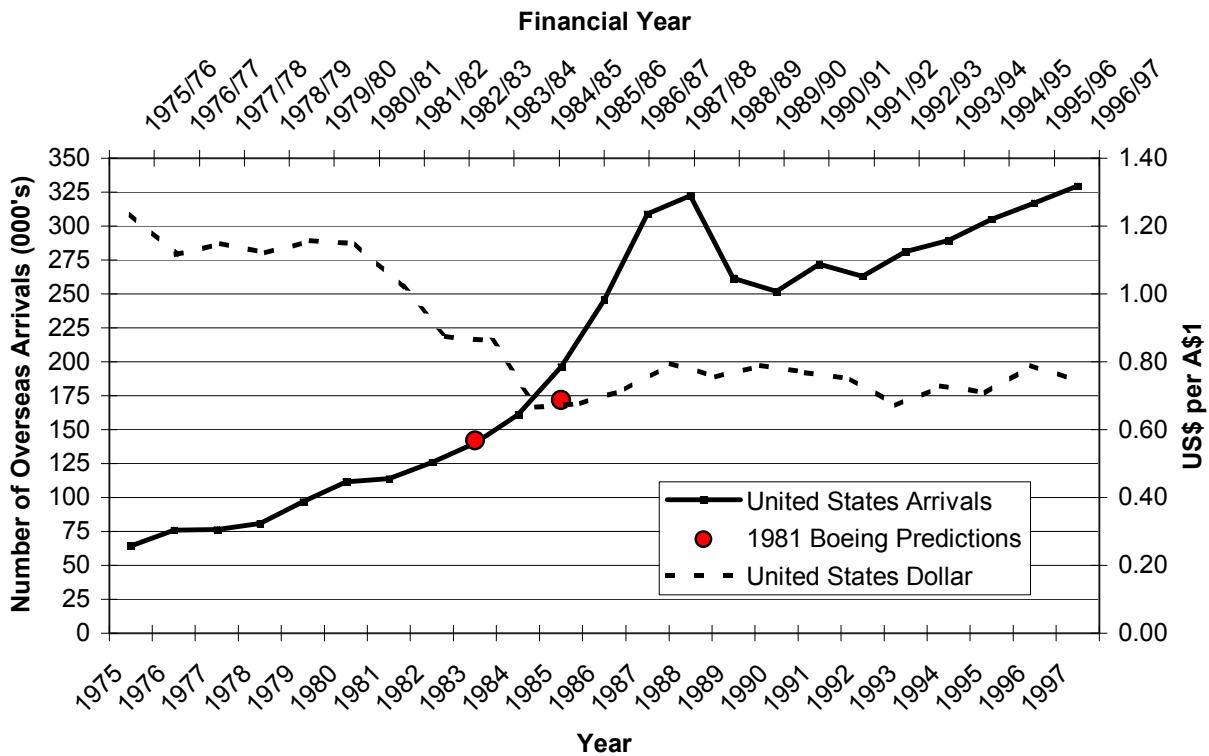


Figure 4.10 United States: Arrivals into Australia and Exchange Rate. Short-term visitor arrivals to Australia from the US 1975-1997 (ABS 3401.0 Overseas Arrivals and Departures), compared with the exchange rate (Reserve Bank of Australia) and the predictions made in the 1981 Boeing Report (QTTC & Boeing, 1981), and illustrating the change in the pattern of visitation that occurred during this 1983-1985 period.

By 1985 there was an air of optimism about tourism for the coming years. Planned events included America’s Cup, Expo 88, Bicentennial celebrations, and the annual Formula One Grand Prix (Department of Sport Recreation and Tourism, 1985). In order to capitalise, the federal government was actively promoting Australia as a destination. In addition to the established commonwealth and state bodies, the Tourism Overseas Promotion Scheme was put in place to facilitate and coordinate promotion of Australia to encourage increased inbound tourism (Department of Sport Recreation and Tourism, 1985).

4.5.2.1 Sunshine Coast - Recovery Period: 1983 - 1985

The growth in tourism visitation to the Sunshine Coast during the early years of the 1980s was expected to continue, especially with the coming introduction of medium-sized jets to the Maroochydore airport (Rider Hunt and Partners, 1983). An additional drawcard to the region was the Noosa Triathlon, first held in 1983. The popularity of this annual event

ultimately resulted in a limit being placed on the number of competitors (Edwards, 2001). Also introduced during this period was the annual race meeting at Corbould Park in Caloundra (Jenkins, 2001).

By 1983, the price of units had dropped to 70 percent of their boom prices. However buyers were still evident for the high quality, well positioned, discounted properties. New high rise projects were not expected to eventuate, until the existing units were sold. In addition, such projects would have to conform to the new building height restrictions of 12 floors in Landsborough Shire and 6 floors in Maroochy Shire (Rider Hunt and Partners, 1983).

Despite the oversupply of units in 1983, an increase in housing approvals was considered necessary to prevent an under supply of new house stock (Rider Hunt and Partners, 1983). The population growth, while the lowest in five years was still above 5 percent per annum, for 1982 and 1983. The turn around in the residential building sector was also expected to be assisted by the lower interest rates for 1983 (Figure 4.4) (Rider Hunt and Partners, 1983).

Commercial property development was occurring with developers able to take advantage of low tenders by builders and sub-contractors due to the limited level of new dwelling construction. This involved aged care facilities and shopping centre expansions at Kawana, Maroochydore, and Bli Bli (Rider Hunt and Partners, 1983).

Development of Noosa Spit again became an issue in 1983. The newly formed QTTC had been given the opportunity to develop two coastal sites that were currently public land. QTTC selected Port Douglas and Noosa Spit, where it aimed to construct an international resort and a deep water marina. Community protest again assisted in the decision that QTTC would 'look elsewhere' (Gloster, 1997).

By 1984, the home unit building sector was showing signs of recovery with the highest number of sales since the property crash of early 1982 (Rider Hunt and Partners, 1984). The release of new projects included the popular 'six pack' walk up units which are relatively inexpensive for the developer and the buyers (Rider Hunt and Partners, 1984).

In addition, a new form of accommodation, timesharing, had reached the Sunshine Coast with the remarketing of a Maroochydore development as a timeshare resort in 1984 (Rider Hunt and Partners, 1984).

During its three-year term, from 1982 to 1985, the Noosa Council achieved numerous town planning and conservation gains. These included increased protection of Noosa River and the North Shore, the introduction of town planning controls over Hasting Street, the prevention of development on Noosa Spit, the construction of the boardwalk from Hastings Street to the National Park, and the concept of a population limit proposed. In addition, the council meetings were open to the public. This policy assisted in raising community knowledge and survived even after subsequent changes in council members (Gloster, 1997).

The cinema complex at Noosa Junction opened in time for the Christmas season of 1985. This was a new direction for the Junction, as a night time venue, with cafes, restaurants, and the cinema which expanded from the initial two cinemas to five (Edwards, 2001).

4.5.3 Tourism Boom: 1986 - 1988

By the mid 1980s there was significant expansion, profitability, and optimism within the tourism industry. The foundations for this tourism boom had been established during the recovery period.

International tourism was becoming 'big business', with the falling Australian dollar assisting inbound travel and hampering outbound tourism. There was an accompanying increase in investment in hotels and resorts, and a recognition of the economic benefits of tourism (Richardson, 1999). Positive signs for Queensland tourism growth were the direct air links to the state's airports and the potential investment from overseas resulting from the virtual elimination of foreign investment restrictions (Rider Hunt and Partners, 1986).

Differences between the State National Party and the Federal Labor Government affected the airline industry, as the 12 percent share of inbound direct flights to Queensland was limited by the Federal Government. This was despite the growing visitor nights spent in the state and the proposal presented by Sir Frank Moore, as chairman of QTTC, for a privately funded new Brisbane international terminal, which was not accepted by the Federal

Government (Rider Hunt and Partners, 1987b). Although the extra flight leg from Sydney to Brisbane was providing a boost to domestic airlines, the rising costs were resulting in higher package prices for a Queensland holiday, make the deals less competitive internationally (Rider Hunt and Partners, 1989).

The growth of total international visitors to Australia for 1986/87 maintained the rate of 25 percent achieved the previous year. This was the highest growth rate achieved by any country. With the bicentenary celebrations and Expo 88 planned, the growth was expected to continue for 1988. This level of visitation was to surpass the '2 million in 1988' planned by John Brown in 1983, when he became the Minister for Tourism, prior to Australia meeting the one million mark (Rider Hunt and Partners, 1988).

The second Boeing Report was released in 1986, providing 'Conservative' and 'Potential' tourism growth forecasts to the year 2000 (Boeing, 1986). The aim of the follow-up Boeing report was to determine the requirements for continued tourism growth in Queensland and the economic benefits of such development (Boeing, 1986).

The report outlined changes in Queensland that had occurred since the initial 1981 report, including increased understanding of tourism's economic benefits, the need for diversified economies, and the proliferation of tourism providers, facilities/services, flights, packages, and promotion. The industry had reached a 'critical mass' that would support further successful tourism ventures, generating a developmental momentum for tourism (Boeing, 1986).

The second report was also more comprehensive, including detailed predictions of global and Australian economic and travel trends (Boeing, 1986). The report predicted tourism growth for 1990, 1995, and 2000 for both 'Conservative Development' and 'Potential Development' for a number of variables at the national and/or state levels. In addition, the report considered visitation levels to the four main regions of Queensland (Boeing, 1986).

The potential 'Development' forecasts for international arrivals for 1990, 1995, and 2000 proved reasonably accurate (Figure 4.11). However, the forecasted domestic travel for Queensland was again overly optimistic (Figure 4.12), with the actual numbers not even reaching the 'Conservative' forecasts. This appears to indicate the quality of the data and

analysis for global travel was not matched for travel at the national level. As discussed in Chapter Three international travel is easier to accurately measure than domestic travel.

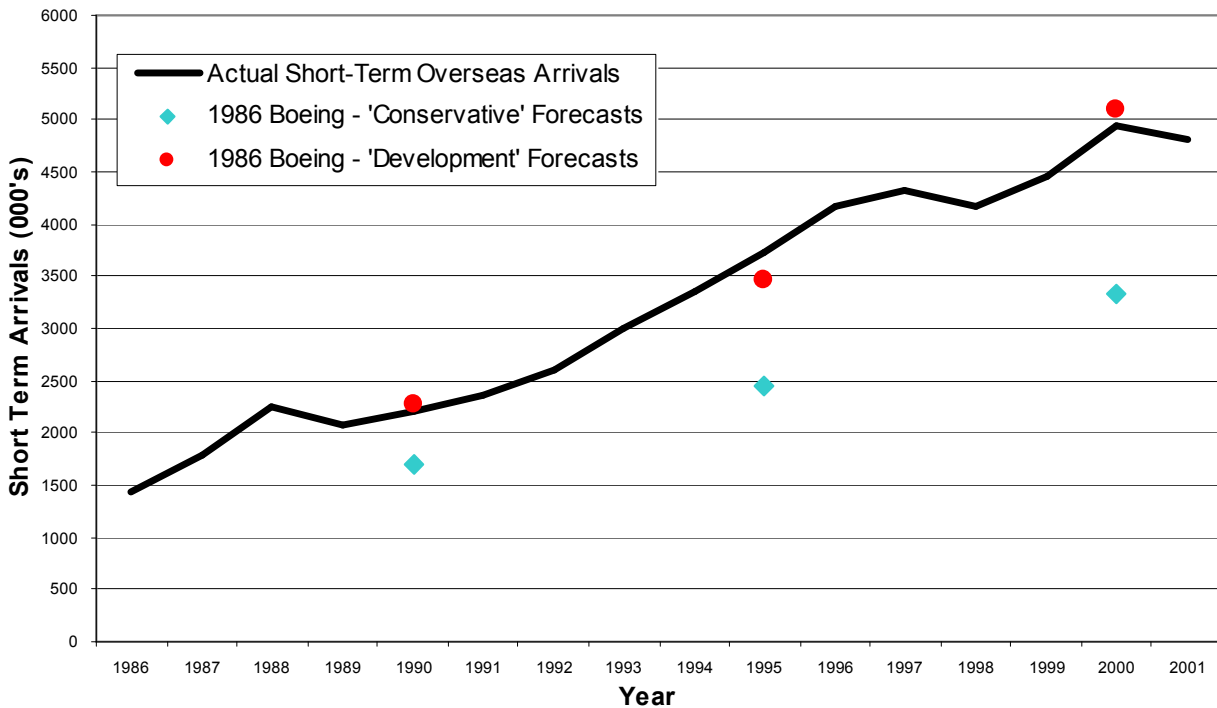


Figure 4.11 International Arrivals to Australia – Actual and Predicted.
 Actual international arrivals to Australia (IVS - 1986-2001), compared with the 1986 Boeing forecasts (Boeing, 1986).

The greater quality and quantity of tourism related data available by the mid 1980s resulted in an expectation that these predictions would be more accurate than the 1981 forecasts (Rider Hunt and Partners, 1987a). The Boeing predictions also assisted in increasing the profile of tourism and provided a data driven rationale for development.

The major tourism event in Queensland during this three year period was World Expo 88, which Brisbane hosted from the 30th of April to the 30th of October 1988 (World Expo 88 Authority, 1988).

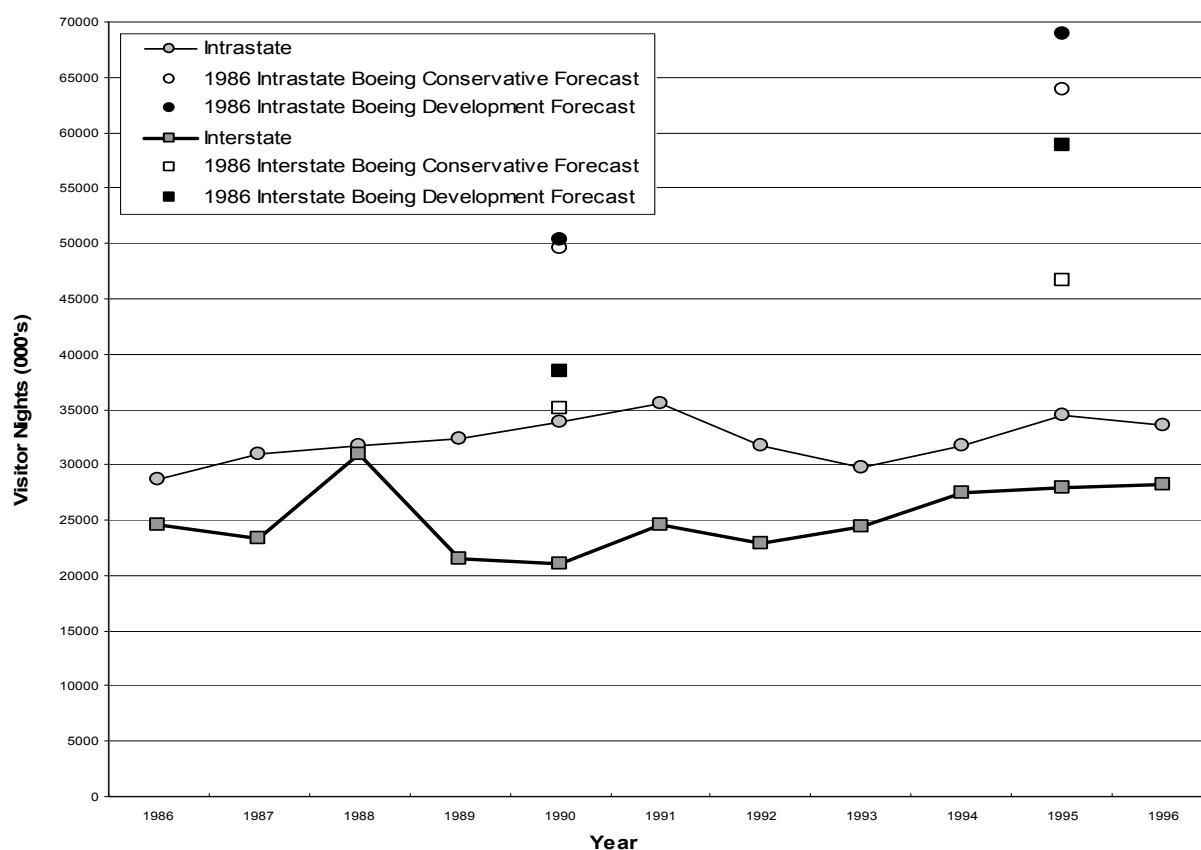


Figure 4.12 Domestic Visitor Nights in Queensland – Actual and Predicted.
Actual domestic visitor nights spent in Queensland (DTM - 1986-1996), compared with the 1986 Boeing forecasts (Boeing, 1986).

The build up to the Expo was also significant. According to the Rider Hunt report released early in 1988, the hopes for Expo 88 appeared well founded, with expectations already being reached and even surpassed, as illustrated by ticket sales and accommodation reservations (Rider Hunt and Partners, 1988).

In support of the Expo, the new runways and domestic terminals had opened at Brisbane Airport, and shopping hour and outdoor dining restrictions had been removed (Rider Hunt and Partners, 1988, 1993). Provision of five-star accommodation boomed through the mid 1980s, reaching its peak in this bicentennial year (Davidson & Spearritt, 2000). The growth was particularly evident in South-East Queensland and in the tourist areas (Rider Hunt and Partners, 1987b). Queensland hotel and general building activity was at record levels with most projects due for completion in time for the Expo and there were thousands of jobs available in the construction and service sectors (Rider Hunt and Partners, 1988).

Total attendance at Expo 88 reached 16.5 million visits, double the initial target of 7.8 million and significantly more than the revised forecast of 12 million (Rider Hunt and Partners, 1988). The QTTC report on the impact of the Expo on Queensland's tourism industry found it an unprecedented success, with the number of visits 70 percent higher than the optimistic forecasts (NCSTT, 1989). Brisbane itself primarily benefited with neighbouring regions and the 'rest of Queensland' also experiencing higher visitation (NCSTT, 1989). The report also predicted that tourism in Queensland would benefit in the long-term by the high level of interest expressed in the state (NCSTT, 1989). Effects of Expo 88 on the Sunshine Coast will be covered in following section (Section 4.5.3.1).

During the 1980s, the economies of the European countries stagnated, while those of Japan and the 'four tigers': South Korea, Taiwan, Hong Kong, and Singapore attained rapid economic growth. Indonesia, Malaysia, and China also increased their industrial development (Macintyre, 1999). The developments in world tourism, as a result of changing economic conditions and lifestyles, particularly applied to the Asia-Pacific region (Grey & Edelmann, 1991). Australia extended trade with Asia and by the end of the decade this region took half of Australia's exports and provided half of the imports (Macintyre, 1999). Additionally increasing numbers of Asians were migrating to Australia. These closer links with Asia, in particular eastern south-east Asia, also affected social and cultural evolution in Australia. Balancing this out, was a loosening of ties to the United Kingdom (Chambers, 1999).

In particular, Japan was experiencing the 'recession of the over-valued yen'. Travelling overseas was one way to capitalise on its buying power (Rider Hunt and Partners, 1987b). When combined with encouragement to travel overseas by their government, Japanese outbound travel soared.

With increasing awareness and promotion of Australian throughout 1987, the introduction of a new airline and competitive airfares, plus the attraction of Expo 88, Japan had become the largest national source of international visitors to Australia by 1988 (Rider Hunt and Partners, 1989; Rider Hunt, 1994). This increasing travel by the Japanese was seen to particularly benefit Queensland, as they appeared to favour the warm climate (Rider Hunt and Partners, 1988).

This prominent attention on the mounting number of Japanese visitors in 1986 was occurring when their yearly numbers to Australia were around 150,000. This was almost three times the number of visitors during 1980. However, over the next six year period their visitation was to escalate to over 600 thousand, representing a further four fold increase (Figure 4.13). This growth rate was above even the positive ‘Potential Development’ predictions of the 1986 Boeing report.

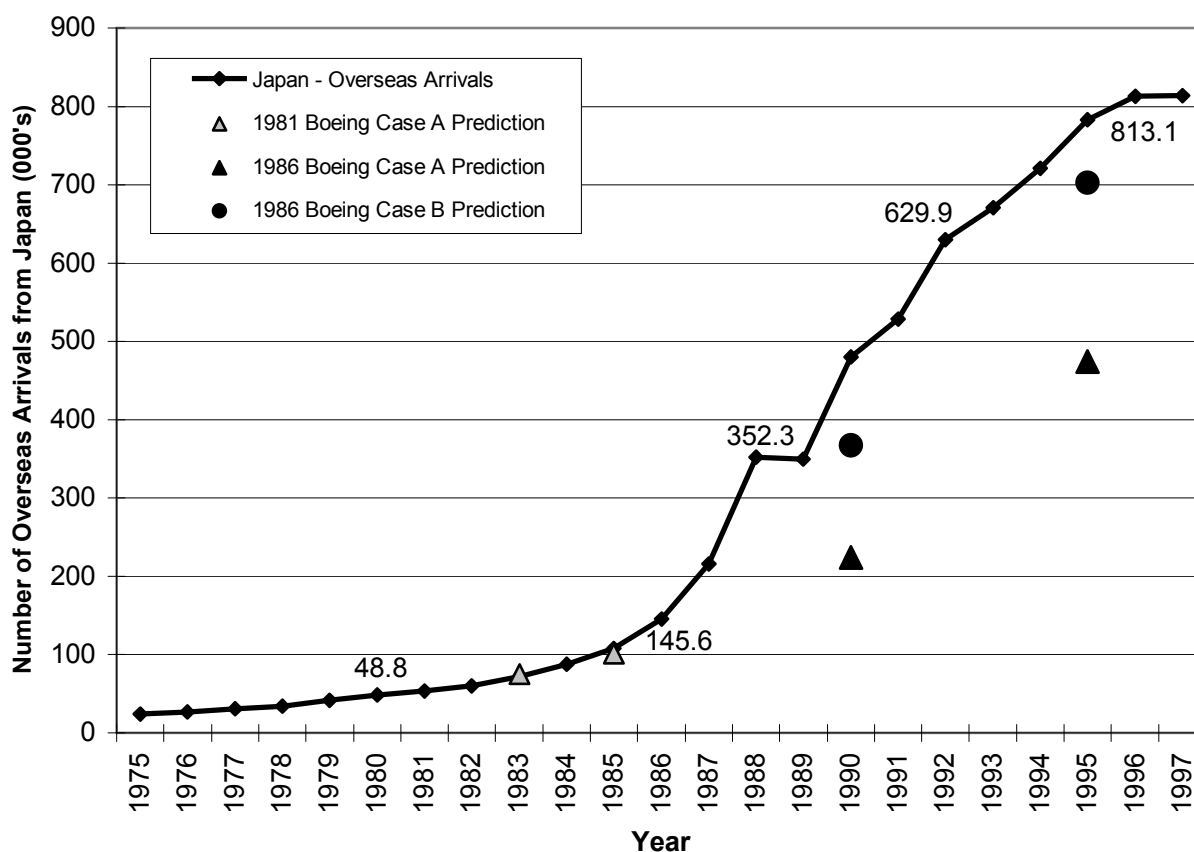


Figure 4.13 Arrivals to Australia from Japan – Actual and Predicted.

Number of short-term overseas arrivals to Australia from Japan 1975-1997 (ABS 3401.0 - Overseas Arrivals and Departures). Highlights that although visitation had tripled over the six years from 1980 to 1986 and there was significant focus on this growing source country, the dramatic growth was yet to come, with four times the 1986 visitation level recorded by the end of the next six year period in 1992. The actual number of visitors is also compared to the predictions made in the two Boeing reports.

The growth in visitation from the US, which intensified in the mid 1980s also continued, with 1987 and 1988 the record years for visitors from the US (as shown in Figure 4.10).

As international tourism became big business, investment in hotels and resorts increased (Richardson, 1999). As well as publicity aiming to attract Japanese visitors to Australian

shores, the Queensland Minister for Tourism, Peter McKechnie, was promoting the State to Japanese investors. This highlighted the opportunities provided by the booming Queensland tourism industry and the limited government interference in foreign investment (Rider Hunt and Partners, 1985).

In the year of 1987, direct tourist expenditure in Queensland increased by 37 percent, as reported by the Major Survey Research Programme (MSRP). This rise was attributed to the higher standard of accommodation that became available and the choice by Australians to utilise the new hotels rather than travel overseas. This also resulted in the number of international arrivals finally exceeding the departures of Australians overseas (Rider Hunt and Partners, 1987b).

From mid 1987, the ABS began to collect tourist accommodation data on the use of self-contained units, flats, and houses. This was vital to understanding the use of accommodation by tourists, as for many destinations, including the Sunshine Coast, units provide the majority of accommodation. In 1988, more than half the holiday units in Queensland were located on the Gold Coast, 30 percent on the Sunshine Coast, and only 6 percent in Cairns (Rider Hunt and Partners, 1988).

Domestically, four wheel drive vehicles were also becoming popular. The addition of new manufactures resulted in decreasing purchase prices (Davidson & Spearritt, 2000). This affected travel to more remote destinations and four wheel drives became part of the camping holiday.

At this time the agricultural sector was also booming as a result of the best wet season for many years (Rider Hunt and Partners, 1988). Politically, the Hawke Ministry continued at the Federal level. In Queensland, the 'Joh era' of almost twenty years, came to an end in 1987, although the National Party remained in power until 1989 under Mike Ahern, the Member for Landsborough on the Sunshine Coast and Russell Cooper (Jenkins, 2001). The Ahern Government's focus was on economic development of the state, including tourism, without the 'cronyism' of the 'Joh era'. However this plan was limited by its two year term (Reynolds, 2002).

4.5.3.1 Sunshine Coast - Tourism Boom: 1986 - 1988

The July 1986 issue of *The Gold Coast & Sunshine Coast Development Report* (Rider Hunt and Partners, 1986) reviewed the report on Australia's tourist industry by Mintel, a statistical research group. This report highlighted the vital role of domestic tourism, with domestic visitor numbers seven times higher than international visitor numbers. However, the focus of tourism promotions was seen to be on high-cost accommodation which in general was unaffordable for the majority of the domestic market. According to the Rider Hunt report the Sunshine Coast should cater to the domestic travellers by providing a complete range of accommodation types, with the focus on the middle to budget price range. In addition, the domestic market was seen to be an increasing source as the falling Australian dollar discouraged overseas trips (Rider Hunt and Partners, 1986).

A pro-development Noosa Council, under Bert Wansley, was elected for the 1985-1988 period. Chairman Wansley considered development to be inevitable and believed that the role of the Council was to ensure such development was orderly. One of their specific foci was to encourage large-scale development on the North Shore. The 'Leisuremark' development aimed to establish a population base there, along with major tourist projects, including a 600 room international hotel, a golf course, an artificial lake, and an airport.

This pro-development Council was opposed by the pro-conservation Noosa Parks Association for their three year term. Mostly each was able to stymie the plans of the other, but not achieve their own goals. The 'Leisuremark' proposal, in various forms, was ultimately blocked after a new council was elected in 1988. Other approved projects did however eventuate, including 'No. 1 Hasting Street', more commonly known as the 'chest of drawers' building as it was staggered against the hillside (Gloster, 1997).

Development of Noosa Spit also became a possibility again when the pro-development Council called for expressions of interest. This resulted in a proposal from Club Med. The campaigns for and against were heated and the level of media attention contributed to Club Med's decision to consider Byron Bay instead (Gloster, 1997). After the numerous failed proposals to develop Noosa Spit, and the continual campaigning of Noosa Parks Association, the State Government declared that the Spit would remain a public park (Gloster, 1997).

Unit sales continued on the Sunshine Coast, with the largest number occurring in Noosa (Rider Hunt and Partners, 1986). These continuing sales lowered the supply and made viable a number of proposed new developments (Rider Hunt and Partners, 1986). Approvals for units, although recovering, had occurred disproportionately across the shires, with high approval numbers in Landsborough and low numbers in Noosa (Rider Hunt and Partners, 1986).

Due to the growing popularity of retirement villages, individual units and studios on the Sunshine Coast began selling during 1986. By mid that year there were approximately 100 dwellings for sale, with another hundred under construction (Rider Hunt and Partners, 1986). The main restriction was the difficulty faced by the potential purchasers who needed to sell their existing properties during the period of economic uncertainty and high interest rates (Rider Hunt and Partners, 1986).

In the retail sector, stage one of the redevelopment of the Maroochydore Shopping Centre was completed, and the Franklins Shopping Centre was built on the main corner of Noosa Junction (Rider Hunt and Partners, 1986; Edwards, 2001).

The second half of 1986 saw the effects of increasing tourism. While the number of visitors had continued to grow, there had been a greater rise in the number of visitor nights and the level of expenditure. There had also been a jump in activity at the Maroochydore airport, with the number of domestic passenger movements increasing over 50 percent for the 1983/84 year (Rider Hunt and Partners, 1986). This coincided with the arrival of the first 737 flight to the Sunshine Coast (Jenkins, 2001).

1986 was the end of the five year downturn that had followed the boom at the beginning of the 1980s. It then took at least another year for the large investors to return to Noosa (Cato, 1989). Optimism about the future of the tourism industry saw the beginning of construction of what was then called the Hyatt Coeur de Lion resort, the approval of the Nambour redevelopment, and extension plans for the Big Pineapple (Rider Hunt and Partners, 1986).

According to Rider Hunt Report, there were two beneficial outcomes of the stock market crash of 1987 for the Sunshine Coast (Rider Hunt and Partners, 1988). The first related to the transfer of cash from stock market to the banking sector, which caused a fall in interest

rates. When combined with negative gearing for residential properties, this resulted in increased approvals and commencements for new residential properties. The second impact was the reduction in speculators at the top end of the unit market. The demand by these buyers had been causing prices to escalate. Had this trend continued the market could have collapsed. Instead constant continual growth occurred (Rider Hunt and Partners, 1988).

Interest in the potential of tourism on the Sunshine Coast was becoming greater. However, the development of tourism facilities was seen as a necessary requirement for attracting increasing numbers of tourists. The gradual growth of major projects, including ‘The Wharf’ at Mooloolaba which was opened in 1988, was expected to gain momentum, as the increased number of facilities and tourists would instil further confidence, resulting in further investments (Rider Hunt and Partners, 1988; Jenkins, 2001).

In 1988, the Sunshine Coast Tourism and Development Board was separated into the new Sunshine Coast Economic Development Board and Tourism Sunshine Coast, which maintain the marketing role for the region (Prideaux & Cooper, 2002).

Although Brisbane primarily benefited from higher visitation during the Expo 88 period from April to October 1988, the Sunshine Coast also experienced increased visitation (NCSTT, 1989). The region attracted 3.7 million visitor nights, of which 80 percent were from interstate or overseas. This level of visitation was an additional increase of 19 percent on top of the average annual growth rate of 13 percent (from 1983-87). Even more significant was the 44 percent rise in visitor expenditure on the Sunshine Coast for 1988, compared to the previous year (NCSTT, 1989). In a review of destinations to be visited in the future the Sunshine Coast was ranked third for both interstate and international visitors to the Expo (NCSTT, 1989).

By the time the Hyatt Regency Coolum was nearing completion, a number of other tourism developments had been proposed, including the Sheraton and Laguna Beach Resorts in Noosa, Twin Waters at Mudjimba, and Underwater World at Mooloolaba (Rider Hunt and Partners, 1988).

The Sheraton Noosa Resort was developed by Suncorp, which was a State Government owned business. As a result it was able to bypass the local Council, so long as it “roughly

complied with the Council's town plan" (Gloster, 1997 p.73). When the construction of this, and other six storey buildings began in Hastings Street, Munna Point, and Noosa Sound, the locals realised the impact of these high-rise developments, and ultimately voted in a new Council. The Sheraton Noosa Resort opened in November 1989, one floor lower than the original plan (Edwards, 2001).

Elected in 1988, this Noosa Council aimed to scale down the extensive development supported by the previous Council. Chairman Playford was to remain head of the Noosa Council through the subsequent Recession, Recovery, and Unstable periods. During this decade a number of changes were made that aimed to integrate business, conservation, and recreation. The town plan was changed to ban all high rise developments in the Shire. Camping was removed from Noosa Woods to allow for regeneration and public utilisation through the sealing of the road alongside Noosa Inlet to the Spit and the establishment of picnic areas, bikeways, and walkways. This transformation provided a boost to public and business sector support for the Playford Council. The Park Road boardwalk from Hastings Street to Noosa National Park was expanded to provide a system of walkways that linked the National Park, the beachfront, Noosa Woods and the Spit, Laguna Hill, Noosa Junction, Noosa Sound, and Noosaville. This was part of the plan to 'landscape' the Shire, beginning with Noosa Woods and Hasting Street, and extending to Noosaville, Noosa Junction, Peregrin Beach and Sunshine Beach, as well as inland to Kin Kin, Cooran, Pomona and Cooroy (Gloster, 1997).

One aim of the Playford Council was to attract people who would create jobs rather than require a job. This included self employed professionals, small business entrepreneurs and self-funded retirees. This exclusivity extended to the type of tourist that the Noosa Council was aiming to attract. The idea was to treat the top end of the tourist market as annual 'honorary Noosans'. This plan was partially driven by the population cap concept, which wanted money to be spent and invested in the Shire without excessive visitor numbers. The focus in all areas was quality not quantity. This 'cultural' marketing philosophy was supported by the introduction of annual events such as the Noosa Jazz Party, and the Hot and Spicy Food Festival (Gloster, 1997).

In the Maroochy Shire, increasing visitors were arriving via the Maroochy Airport. However, the terminal was unable to cope with the peak passenger periods (Rider Hunt and Partners, 1988).

Also in the Council elections of 1988, Councillor Don Aldous became the second Mayor of Caloundra City, succeeding the late Jack Beausang. His Mayoral term supported the expansion of infrastructure throughout the City and a rate of growth seldom paralleled in Queensland. He served on the foundation committee of Sunshine Coast Turf Club, which built the racecourse and associated infrastructure at Corbould Park. Cr Aldous has also served on the Sunshine Coast Tourism Board and the Sunshine Coast Economic Development Board.

The major tourism developments in Queensland were documented in a 1988 research report (Basch & Bull, 1988). These projects were separated into three categories: under construction, committed, and proposed. On the Sunshine Coast there were a number of hotels and resorts in each category, with one 'other tourist development' underway, and few proposed, as shown in Table 4.1 (Basch & Bull, 1988). This illustrated the level of optimism surrounding tourism during 1988, as the growth of the past few boom years was expected to continue.

**Table 4.1 Major Sunshine Coast Tourist Developments.
As at February 1988 (Basch & Bull, 1988).**

Stage	Hotels & Resorts	Other Tourist Developments
Under Construction (1988-89)	Hyatt Regency Coolum On The Beach Noosa Crest Units Maroochy River Holiday Resort	The Wharf - Mooloolaba
Committed (1989-91)	Twin Waters River Heads Resort & Marina Cascades International Rainbow Mountain Country Club Alexandra Park Tourist Village & Fauna Park Apartments Noosa	
Proposed (1990-92)	Hilton Terrace Resort Settler's Cove Club Crocodile Resort Tripcony-Hibiscus Park Development Mayfair Resort Noosa Northshore Resort Hotel Mooloolaba	Laguna Lookout & Theme Park Underwater World Harbourside Marina

4.5.4 The Recession: 1989 - 1991

In 1989, the growth in international tourists plateaued. The increase over the previous three years had been the result of a number of positive factors discussed above (Rider Hunt and Partners, 1989). In addition to the predicted drop in visitation after Expo 88, travel within Australia was significantly hampered by the Pilot's Dispute, which lasted from August 1989 to January 1990. The situation was considered to be an example of a modern corporate state, as the government, big business, unions, and the industrial tribunal all worked together, with the support of the general public, against the single union (Norington, 1990).

A report by QTTC on the effect of the strike found the total loss in visitor expenditure in Queensland to be \$473 million (QTTC, 1990). The strike depleted finances and in the case of Ansett utilised resources that were originally planned to be used in preparation for deregulation, ultimately weakening the airline (Easdown & Wilms, 2002).

The downturn in visitation caused by the pilot's dispute resulted in accommodation providers offering discounts to attract visitors. Findings from the survey on the level of discounting in Queensland showed that up to 80 percent of the accommodation providers in certain regions were offering discounts of between 10 percent and 50 percent off the standard room rates (QTTC, 1990). The response by the Sunshine Coast accommodation providers will be reviewed in the following section (Section 4.5.4.1).

As expected, the 1989 MSRP data on travel in Queensland showed decreases due to the pilots' dispute. The effect on travel was highlighted by the data on the type of transport used to reach Queensland which showed a rise in numbers travelling by car. The number who still arrived by air indicated the positive impact of the emergency substitution arrangements. However the dispute did not result in a windfall for other transport operators with no notable rise in the number travelling to Queensland by rail and coach, except for Far North Queensland where coach travel increased (Rider Hunt and Partners, 1990).

Another change in the visitation patterns was the transfer from interstate travellers to Queensland visitors. This was considered to be due to the booking by Queenslanders of the cheap packages offered by operators to boost the dramatic occupancy drop. This swing to

intrastate visitors also explains why the coach and rail sectors did not receive a significant gain, except in Far North Queensland (Rider Hunt and Partners, 1990).

Using November 1989 as an indicator of the impact of the dispute, Rider Hunt determined that a drop of 20 percent had occurred in the number of international tourist arrivals to Australia (Rider Hunt and Partners, 1990). This was the one year during the 1980s when international visitation dropped noticeably (Figure 4.11).

In 1990 the domestic aviation market was deregulated, with the passing of the Airlines Agreement (Termination) Act (Barker, 1992; Atherton & Atherton, 1998). Despite the aim of the airlines to maintain the status quo the deregulation was attributed to the power of the deregulation trend internationally as a progressive economic tool, combined with the lobbying of the tourism industry (Gow & Maher, 1994).

The main impact of competition in the domestic airline industry, as a result of deregulation, was the drop in airfares and the introduction of more direct flights. This made air travel between certain cities cheaper than travel by bus or train. In particular Cairns became more affordable for domestic travellers (Rider Hunt and Partners, 1991). Subsequent airline changes that followed deregulation included the rise and fall of Compass (December 1990 – December 1991) and Compass II (August 1992 – March 1993) (Atherton & Atherton, 1998; Richardson, 1999).

By the early 1990s the business and economic boom was over. In addition to the increasing number of bankruptcies, unemployment was above 10 per cent, the budget deficit was increasing, savings were low, exports were decreasing in competitiveness, and the treasurer Paul Keating had announced an economic recession (Barker, 1992; Stewart, 1994).

Australia was not alone as much of the Western world was in a recession. This, combined with concerns of safety and terrorism due to the Persian Gulf War resulted in a downturn in international tourism for many countries (Go, 1997). In Australia international tourist numbers continued to increase but the yield was lower, due to decreases in the number of visitor nights and overall expenditure (Richardson, 1999).

There was concern over the future level of international tourism to Australia as visitor numbers for November 1990 were only slightly higher than the 1989 figure, which had been affected by the pilots' dispute (Rider Hunt and Partners, 1990). This uncertainty was due to number of factors, including the lower financial support for overseas marketing campaigns by government, the impact of deregulation on domestic airfares, the decrease in international airfares due to the increasingly competition marketplace. It also included privatisation of the government airlines, the growth of new and therefore competing destinations in Eastern Europe, the military conflict in the Middle East, foreign investment restrictions, and the worldwide economic recession (Rider Hunt and Partners, 1990).

International travel in the first few months of 1991 was significantly affected by the Gulf War. Although the war ended in March, there were limited forward bookings for the second quarter, resulting in a fall in people flying to and from Australia in the first half of 1991 (Rider Hunt and Partners, 1992). Because of the drop in visitor numbers, special airfare and accommodation packages were offered. These did entice some travellers, especially from New Zealand (Rider Hunt and Partners, 1991). By mid year, the situation had improved, and increased numbers of international visitors began arriving (Rider Hunt and Partners, 1991). In these conditions Australia still increased its general inbound Japanese visitors for 1991, one of only two destinations to achieve this (Rider Hunt and Partners, 1993).

In 1991, the recession was expected to halt the growing level of tourism activity. Modest growth was expected, primarily with a domestic focus. The increase in Australians travelling within the country was considered to be the result of the drop in domestic airfares due to deregulation and the rise in international airfares because of the Gulf War (Rider Hunt and Partners, 1991). Additionally, the recession was affecting the number of jobs available in London, resulting in a decline in the number of European working holidays (Rider Hunt and Partners, 1991). If domestic tourism accounted for 90 percent of tourism in Australia, a 10 percent decrease in international travel to Australia could be counteracted by a 1 percent rise in domestic travel (Rider Hunt and Partners, 1991).

Although the economic situation deteriorated after the 'boom' period, Queensland's economic and tourism development was above the national average (Grey & Edelmann, 1991). Heavy investment in tourism development in the State was still being planned in

1989 but progressively through the year there was a reduction in the number of firmly committed projects (Grey & Edelmann, 1991).

In late 1989, a Labor Government was elected in Queensland, the first in over three decades. At the beginning of the 1990s, Queensland was considered the growth state. The population passed the three million mark, growing at double the National rate. 75 percent of this growth occurred in South-East corner. In addition, the unemployment level was lowering (Rider Hunt and Partners, 1990, 1992).

The 1991 report on the challenges and opportunities of tourism in Queensland, conducted by the Committee for Economic Development of Australia (CEDA) (Grey & Edelmann, 1991), commented on the 1986 Boeing Report, indicating its influence and lasting impact. The foreword of the CEDA report also highlighted the focus of foreign investment on the up-market segment, rather than the middle of the range domestic market which still formed the vast majority of Australian tourism (Proctor, 1991). For the three years from 1987, over 50 percent of foreign investment in tourism outside capital cities had occurred within Queensland (Grey & Edelmann, 1991).

In the tourism sector a number of large prominent businesses were placed into receivership because of the combination of the oversupply of hotel rooms, particularly in five-star accommodation, the pilots' dispute and lower tourism demand (Grey & Edelmann, 1991). Despite the deflation of the tourism growth rate, domestic tourism was still expected to increase, due to extensive advertising, incentive discounts, and the rise in international airfares due to the Middle East conflict (Rider Hunt and Partners, 1989, 1990).

One growing accommodation sector during this period, was bed and breakfast establishments. These small but numerous concerns were then included in the national accommodation guides. This type of accommodation had been fashioned on the British style that Australians had experienced while on holiday there (Davidson & Spearritt, 2000).

Assisting travel to Queensland from the southern state was the upgrading of the Pacific Highway from two to four lanes. This route links Sydney with Brisbane and is one of the most popular tourist routes in Australia, with numerous coastal resorts located along the

way. The upgrade was funded by the state and federal governments (Davidson & Spearritt, 2000).

Sir Frank Moore stepped down as Chairman of QTTC in 1990. However, his influence on tourism development was still expected to be felt through his new role, leading the tourism industry body, Australia Tourism Industry Association (ATIA) (Rider Hunt and Partners, 1990).

Other changes within the Australian tourism industry heralded increasing coordination between the various tourism surveys. The regional boundaries of the MSRP, conducted by QTTC, had been changed to fit the ABS borders (Rider Hunt and Partners, 1990). In addition, the IVS data from the BTR became available monthly. This significantly reduced the period of time between data collection and its commercial application (Rider Hunt and Partners, 1990).

By the 1990s the main sources of growth of inbound tourism had changed. The traditional markets of New Zealand, Western Europe and North America, had been replaced by Asian nations, with the initial focus on Japan (Griffin & Darcy, 1997). This potential visitation was seen as incorporating much of Asia, as the economies were improving and the standards of living were increasing. The change from the traditional markets was seen as particularly relevant for the hotel sector, as a significantly higher percent of Asians utilise this form of accommodation (Rider Hunt and Partners, 1990).

Although 1991 ended with a worldwide recession, tourism in Queensland was recovering, and the outlook was positive (Rider Hunt and Partners, 1991). International visitation to Australia had reached a record high despite the slow start (Rider Hunt and Partners, 1992). The number of holiday visitors from overseas had doubled between the early boom year of 1986 and 1991. This growth was expected to continue, boosted by increased funding and competitive airfares (Rider Hunt and Partners, 1992).

Within just three years of Expo 88 the Queensland tourism industry had faced “the pilots’ strike, an over supply of accommodation, a slower national economy, and a reassessment by foreign investors of Queensland’s tourist potential” (Grey & Edelmann, 1991 p.7).

The Foreign Land Register reported in March 1990 that foreign investors only owned 1 percent of the State. Japanese ventures accounted for the largest foreign invested value, while US ownership represented the greatest land area (Rider Hunt and Partners, 1990). The Foreign Land Register follow up report of 1991, demonstrated that foreign ownership in Queensland had occurred for different countries at different times. Germany invested during 1980-82, Britain during 1981-85, the US during 1987-89, and Japan from 1988 to 1990 (Rider Hunt and Partners, 1991).

Despite this generally small role in the state, a study conducted on foreign ownership of tourism operations in the Queensland coastal destinations, conducted by the Foreign Investment Secretariat of the Queensland Treasury Department, showed that the investment had been focused on certain areas and operations. Over 60 percent of 5-star hotels in the State's three main tourist destinations, the Sunshine Coast, Gold Coast, and Cairns, were foreign owned, and of these 60 percent were Japanese owned. A second focus had been duty free stores on the Gold Coast, with 70 percent being foreign owned. There were no foreign investments in 1-2 Star accommodation or in the Whitsunday region (Rider Hunt and Partners, 1991). A second component of the study considered the management of the hotel, rather than the owner. Although Japanese owned 9 out the 14 five-star hotels in Queensland, only three were managed by Japanese companies. American companies managed half, with two operated by Hong Kong companies, one managed by a United Kingdom company, and one by an Australian company (Rider Hunt and Partners, 1991).

Although the level of foreign ownership was high for certain sectors of the tourism industry, this input of foreign investment was considered necessary for growth in the tourism industry as Australian investment was not forthcoming (Rider Hunt and Partners, 1991).

4.5.4.1 Sunshine Coast - Recession: 1989 - 1991

In early 1990, the Sunshine Coast was initially performing well, despite the high interest rates, and low consumer confidence (Rider Hunt and Partners, 1990). However, by the second quarter, the negative economic climate had reached the Coast (Rider Hunt and Partners, 1990). Despite the economic and housing situation, tourism continued to grow. In fact the downturn, combined with the conflict in the Middle East encouraged Australians to

holiday closer to home, boosting visitation to the Sunshine Coast (Rider Hunt and Partners, 1991).

By the end of 1989, there was a downturn in both the house and unit sectors. This was seen as the result of the increasing interest rates (Figure 4.4), rising building costs, and a drop in consumer confidence (Rider Hunt and Partners, 1989). In general, the downturn in the housing sector was relatively uniform across the Sunshine Coast (Rider Hunt and Partners, 1990). This returned commencements to the level required by the existing population growth trend (Rider Hunt and Partners, 1990). By 1989 the population of the three Sunshine Coast shires had reached the 1978 Gold Coast population (Rider Hunt and Partners, 1989).

By mid 1989 the Sunshine Coast had the third highest number of hotel rooms, after the Gold Coast and Cairns, having overtaken the number of rooms provided in Brisbane (Rider Hunt and Partners, 1989). Based on the ABS tourism data, the Rider Hunt Report commented that the Sunshine Coast was the cheapest place in Queensland to take a holiday, as the average expenditure was only \$42 per room night (Rider Hunt and Partners, 1989).

The level of foreign ownership on the Sunshine Coast was not as dependent on Asian investors as other tourist centres. In fact, the largest area of foreign owned land belonged to investors from the United Kingdom, with the smaller area of land owned by New Zealanders worth the most (Rider Hunt and Partners, 1990).

In the April edition of the Rider Hunt Report the suggested focus for tourism on the Sunshine Coast was the domestic market (Rider Hunt and Partners, 1989). Data had shown that most tourists are from interstate, followed by Queensland visitors, that they arrive mainly by road and stay about one week. Stable sustained moderate growth was seen as attainable if the destination concentrated on attracting the long stay domestic visitors, rather than competing for international visitors with destinations that provided better airport and tourist facilities (Rider Hunt and Partners, 1989).

Due to the downturn in visitation as a result of the pilot's dispute, the commercial accommodation providers offered discounts to attract domestic visitors. The survey conducted in 1990 to determine the level of discounting in Queensland, found that on the Sunshine Coast, 20 percent of the hotels and motels were offering discounts and 25 percent

of holiday units were discounting (QTTC, 1990). Despite the negative impacts of the dispute, the hotels and motels on the Sunshine Coast did more business than expected, despite or as an outcome of the pilot's dispute (Rider Hunt and Partners, 1990).

During this recession period, the first major stage of the Sunshine Motorway was completed (Rider Hunt and Partners, 1989). This was expected to affect the long-term urban growth of the Coast (Rider Hunt and Partners, 1990). The Noosa Chamber of Commerce was lobbying for the second stage of the Motorway to extend to Noosa Heads. Despite the Queensland Government's plans to upgrade the coastal highway, traffic congestion was still believed to be a significant problem in accessing Noosa (Rider Hunt and Partners, 1990). Inland, the four lane highway was extended to Nambour, providing fast and easy access to and from Brisbane, and the Nambour bypass was opened (Rider Hunt and Partners, 1990; QTTC, 1991).

The Noosa Council had been attempting to obtain State Government approval for a Development Control Plan for Noosa's North Shore since the beginning of their term, in 1988. This finally occurred after the State change to the Labor Government of Wayne Goss (Gloster, 1997).

Developers were focused elsewhere, including T.M. Burke's proposed 'Spaceworld Theme Park', with residential development and a lake system for Emu Swamp, which lay west of the David Low Highway at Peregrine Beach. This proposal promoted lobbying by the Noosa Parks Association for the inclusion of the area in Noosa National Park. The Noosa Council, followed by Maroochy Council rejected T.M. Burke proposal and the Goss Government approved the addition of the land to the National Park just prior to the 1992 State Election.

However, T.M. Burke's initial concept of Noosa Waters from the 1970s became a reality in 1991, after numerous variations and having passed through a number of companies. At the initial sale all land was sold (Edwards, 2001). Another addition to the Noosa Shire was Noosa River Harbour Town at Tewantin, which incorporated a marina with rentable berths, the first in Noosa (Rider Hunt and Partners, 1990).

In contrast the plans for Settler's Cove resort at Noosa Inlet were abandoned (Rider Hunt and Partners, 1990). In 1988, this had been one of the proposed developments during the

peak of the tourism boom (Table 4.1). Kern Corporation, which developed Apartments Noosa in 1988, had all three of its Sunshine Coast sites on the market by 1990 (Rider Hunt and Partners, 1990). In general, the large-scale developments had slowed, but approvals for medium-level projects continued (Rider Hunt and Partners, 1990).

Despite the recession, development in the Maroochy Shire continued with the opening of the \$300 million, 324 room Twin Waters Resort, expansions to the Mooloolaba Underwater World which doubled the size of the tropical oceanarium, and the new \$2 million terminal at the Sunshine Coast Airport began operation (Rider Hunt and Partners, 1990; Maroochy Shire Library Service, 1994). In addition, the Osprey, the first beachfront accommodation at Mooloolaba for about eight years, was under construction (Rider Hunt and Partners, 1990). The Maroochy's CBD was also to undergo a \$200,000 rejuvenation, and the Maroochy Council was preparing development control plans for the railway and hinterland towns (Rider Hunt and Partners, 1990).

Changes were also happening in Caloundra Local Area, with plans for a commercial and retail two-tiered building, called Caloundra City Centre, and the opening of the Ettamogah Pub (Rider Hunt and Partners, 1990).

4.5.5 Recovery Period: 1992 - 1994

By the beginning of the recovery period in 1992, Paul Keating had become Prime Minister. This Labor Government was to further the policies of the previous decade through the sale or partial sale of government enterprises, increasing trade with Asia, reducing protection of Australian industries, assisting enterprise bargaining, and reducing public expenditure (Chambers, 1999; Macintyre, 1999). In regard to tourism, Paul Keating called tourism the 'star growth industry of the Nineties' (Rider Hunt and Partners, 1993).

Both the National and State economies appeared to be on the road to recovery by 1992, after two financial years of zero economic growth. The housing led recovery was showing positive signs, and the boom would continue throughout this recovery period. The residential development was encouraged by low interest rates, the First Home Buyer scheme, high affordability conditions, strong consumer confidence, and the improving employment market (Rider Hunt, 1994, 1995; Midwood - Tourism & Development, 1996).

The State's tourism industry was also doing well in 1992, recording the busiest ever eight month period (Rider Hunt and Partners, 1992). The falling Australian dollar boosted tourism, although growth was perceived to be limited by the supply of suitably located accommodation (Rider Hunt and Partners, 1992).

The Federal Economic Statement made in 1992 provided some tax concessions and incentives for tourism development. However, this was not expected to be enough to encourage the required investment in new hotels. Financiers had extensive requirements for the funding of such projects, and investment from overseas was limited as other countries were competing for the financial boost. Rider Hunt proposed that further government incentives were required as any tax received would be more than that from non-existing projects. Without new accommodation the growth in visitors would be limited by supply, rather than demand (Rider Hunt and Partners, 1992).

Also in 1992, the National Tourism Strategy was launched by the Tourism Minister, Alan Griffiths. This strategy, titled 'Australia's Passport to Growth' boldly forecast 6.5 million overseas visitors by the year 2000. The question posed by Rider Hunt was, will there be enough rooms to accommodate them? Even if all the potential projects did go ahead the supply would only be increasing at one quarter of the level of the forecast demand (Rider Hunt and Partners, 1992).

1992 was a significant year for tourism in Queensland, as the state overtook New South Wales as the 'main holiday State' for international visitors (Rider Hunt and Partners, 1993).

In terms of international air travel, the decision by Qantas to utilise Cairns as a hub saw a corresponding rise in the number of flights (Rider Hunt and Partners, 1992). Air New Zealand had selected Brisbane as its Australian hub, under the Trans Tasman 'Open Skies' agreement. This resulted in an increase in the number of flights to Asian destinations and provided an additional reason to move ahead with the international terminal in Brisbane (Rider Hunt and Partners, 1992). During 1992, the Federal Government also made a number of Aviation Policy reforms. These included the merging of Qantas and Australian Airlines, progressive deregulation of domestic and international airline operations, deregulation of trans Tasman traffic, and the granting of 'Beyond Rights' to Air New Zealand (Rider Hunt and Partners, 1993; Atherton & Atherton, 1998; Richardson, 1999).

In the 20 years since the first direct flight between Japan and Australia in 1973 the number of flights had increased to 55 each week (Rider Hunt and Partners, 1983). Another increase in the role of Australia in international air travel was the sale of one quarter of Qantas to British Airways, providing an important link to one of the powerful world airlines (Rider Hunt and Partners, 1993).

In a review of international tourism to Australia for the first three years of the 1990s, based on the IVS data, the Rider Hunt report examined the apparent phenomenon whereby the number of inbound visitors was increasing, but the total number of nights was decreasing. The forces resulting in this overall reduction in the average length of stay were considered two-fold. Firstly, the effect of the worldwide recession reduced both the number of backpackers and those visiting friends and relatives, the two long stay markets. Secondly, the rapidly growing Asian markets were generally short stay visitors (Rider Hunt and Partners, 1993).

Throughout the 1980s the total number of visitors to Australia from Asian countries increased in accordance with the rising number of Japanese travellers (Figure 4.14). This pattern changed in 1992, with the dramatically increasing number of total Asian visitors growing well above the growth of the Japanese market. This initial increase in the numbers from the 'rest of Asia' was mainly due to dramatic growth in visitation from Singapore and Taiwan (Rider Hunt and Partners, 1993). The trend continued and for 1993 more visitors arrived from 'other Asia' than from Japan, although Japan remained the largest national source of visitors, a position it had maintained since 1988 (Rider Hunt, 1994).

Taiwan had 20 million people, and growth in visitation to Australia for the five years to 1991 was 190 percent (Rider Hunt and Partners, 1992). However, this growth had been from a small base of 12,000 visitors in 1986. By 1993/94 Taiwan had become Australia's sixth largest source country, due to the easing of restrictions on outbound travel, and the addition of direct flights between the two countries (Prideaux, 1995). One factor considered to be restricting growth was the limited knowledge of Taiwanese about Australia (Rider Hunt and Partners, 1992). In addition, there appeared to be limited recognition of the potential of the significant and sustained growth in outbound Taiwanese travel by the Australian tourism industry (Prideaux, 1995, 1996). South Korea had 42 million people, and its growth in visitation to Australia for the five years to 1991 was 390 percent (Rider

Hunt and Partners, 1992), although this jump was from an even smaller base of 4,800 visitors.

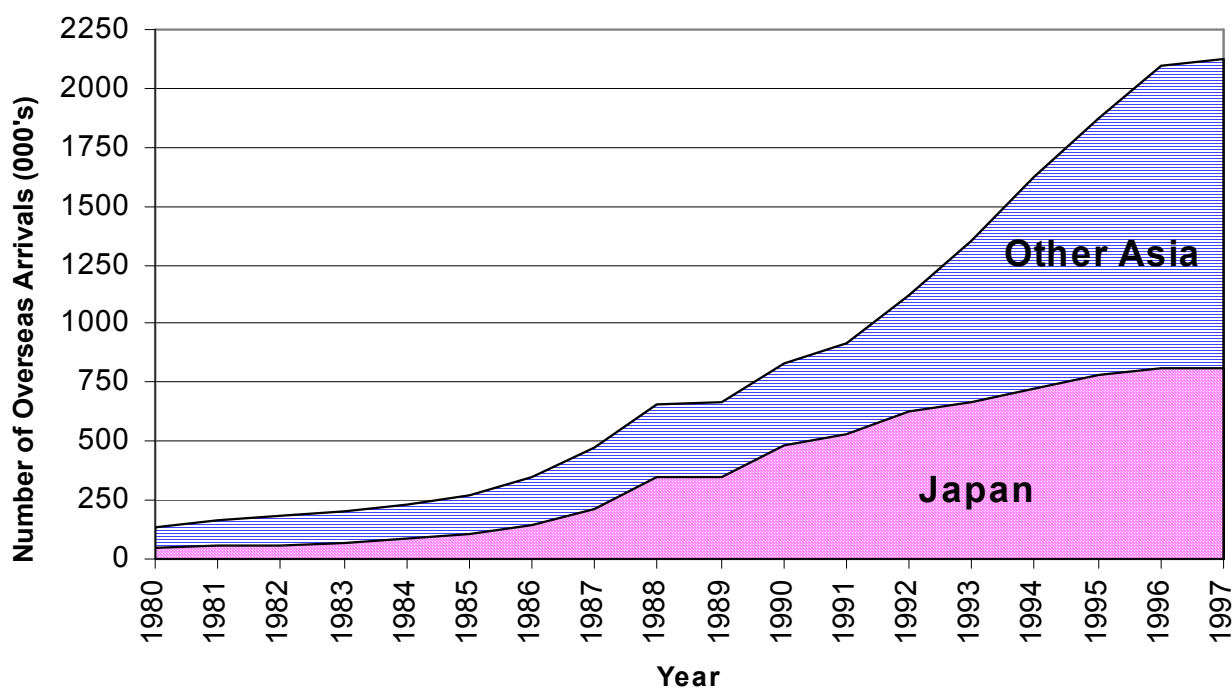


Figure 4.14 International Arrivals to Australia from Asia.

Total number of international arrivals to Australia from Asia 1980-1997 (ABS 3401.0 - Overseas Arrivals and Departures), separated into the number of arrivals from Japan and the number for the rest of Asia, and illustrating that the increase in total Asian arrivals matched the growth in Japanese visitors until 1992.

While spending had previously been declining as the length of stay by international visitors reduced, there was an increase of 20 percent in shopping expenditure in 1993. This was attributed to changes in the items offered to the visitors (Rider Hunt, 1994). The first half of 1993 saw a jump in visitation from New Zealanders, a reflection of their economic recovery and the strengthening New Zealand dollar (Rider Hunt and Partners, 1993). In addition, the number of Singaporean, Taiwanese and Korean tourists coming to Queensland continued to rapidly increase, with Korea the fastest growing Asian market in 1993 (Rider Hunt and Partners, 1993; Rider Hunt, 1994). Another boost in international nights for Queensland was due to the holding of the international Lions convention in Brisbane (Rider Hunt, 1995). In addition to the growing visitation from the 'other Asia' markets, the potential accompaniment of investment from these countries was also posed (Rider Hunt and Partners, 1993).

In December 1993, QTTC bought together their overseas managers for a review on the different markets (Rider Hunt, 1994). Although Japan was a high growth market and Australia was considered the No. 1 overseas preference, Australia was only receiving 5 percent of their outbound market. Additionally the Japanese market was changing. It had expanded from the original honeymooners and office ladies, to families, school graduation trips, women aged between 40-55, the mature age group, and incentive tax free company holidays (Rider Hunt, 1994). The limitations to further growth from Taiwan were considered to be the limited seat capacity to Queensland, especially the Far North, and the lack of tourist brochures in Chinese. This was supported by the data on visitor numbers which showed the growth from Taiwan as easing by late 1993 as seat capacity filled (Rider Hunt, 1994). Malaysia was considered to have great potential, but Australia was perceived as an expensive destination by the budget conscious Malays. Indonesia was also seen to have potential, with the growing affluence of the middle class and their positive perception of Australia. This however was offset by the Indonesian Government not encouraging overseas travel (Rider Hunt, 1994).

The high growth in visitation from the 'Rest of Asia' during the 1990s was not evenly spread across the generating countries (Figure 4.15). The initial high growth, from 1991 to 1994 was predominantly from Singapore and Taiwan. A second major growth period was from 1992 to 1996, and this was primarily from the markets of Korea, Indonesia, and Hong Kong. Over this five year period there was also growth, of a more gradual nature, from Malaysia and Thailand. All Asian markets would then slow in 1997.

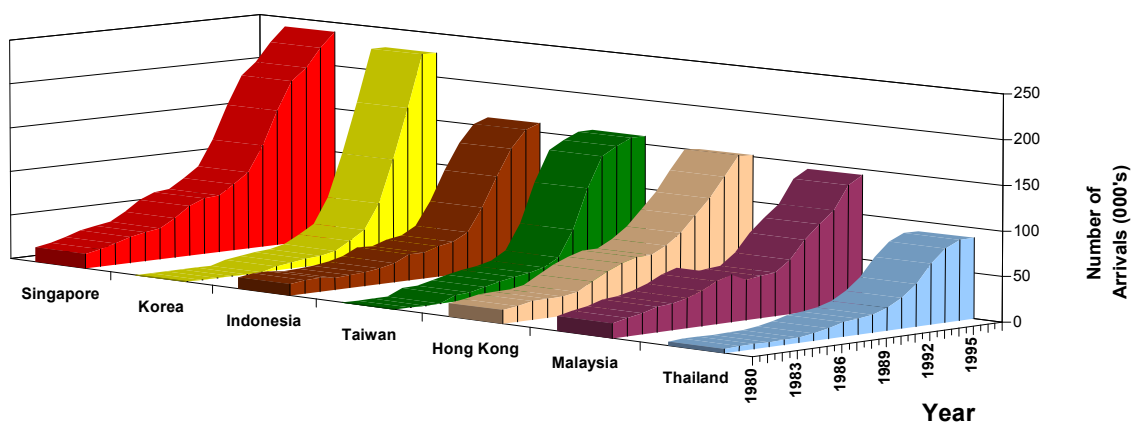


Figure 4.15 International Arrivals to Australia from the Main Asian Source Markets. Excluding Japan 1980-1997 (ABS 3401.0 - Overseas Arrivals and Departures).

Overseas visitor numbers continued to increase during 1994. However this incorporated a drop in the number from New Zealand. The continual strengthening of their economy, with the introduction of the Goods and Services Tax, may have resulted in New Zealanders venturing further away for their trips overseas (Rider Hunt, 1995). The economic recovery also under way in America also affected visitor numbers, with growth of over 10 percent from this market (Rider Hunt, 1994). Effective from April 1994, the tax free overseas incentive holiday was extended by the Japanese Government from three to four nights (Rider Hunt, 1994). Japanese visitation to Queensland was also assisted by the reintroduction of direct flights from Japan to Brisbane, and the opening of the 24 hour Kansai International Airport near Osaka in Japan. This new airport initially provided seven thousand extra seats to Australia each week (Rider Hunt, 1994, 1995). In the 'other Asia' markets, Korea moved into third place after Singapore and Taiwan (Rider Hunt, 1994). Although in 1989, the restrictions placed on overseas travel by Koreans were lifted, it was in 1994 that this was extended to include civil servants (Rider Hunt - Midwood, 1996).

In early 1993 investors seemed to be waiting for the Federal Election in March before starting new projects (Rider Hunt and Partners, 1993). Despite this 1993 was the height of the housing boom (Midwood - Tourism & Development, 1996). The growth was attributed to "low interest rates, high affordability conditions, strong consumer confidence, *and the improving employment market*" (Rider Hunt, 1994 p.3 italics added). At that time, the most expensive land in Queensland was located at the Gold Coast, Noosa, and Cairns (Rider Hunt, 1994). In the public sector, there was also significant building activity, with major projects under way in Brisbane including the Treasury Casino and the International Airport Terminal (Rider Hunt, 1994). The Federal Minister for Tourism had also established the Tourism Forecasting Council in 1993. It's aim was to generate 'accurate and reliable' forecasts for the industry (Midwood - Tourism & Development, 1996).

A change for the building sector in 1994 was the Building Units and Groups Titles Act (Queensland Government, 1994). The Act increased flexibility as developments could occur in stages. In addition, it became possible to incorporate both group and strata titles in a development, and for different Body Corporates at different stages of a development. An important impact of the Act for the tourism industry was the provision for lease-back hotels, with increasing control to be held by the lessee/hotel operator (Rider Hunt, 1995).

According to the Queensland Development Report (Rider Hunt, 1994) the increasing visitation to Queensland's main destinations was not being matched by the supply of rooms. Some of the factors causing this lack of investment were considered to be the "world wide shortage of capital, reluctance of institutions to invest in hotels, poor profitability in the past, *and a lack of understanding of tourism trends*" (Rider Hunt, 1994 p.7 italics added). This problem was to be exacerbated if the demand level was to rise as expected. The ATC published forecasts in 1994 for international visitor numbers to Australia, predicting 8.4 million arrivals in 2004. This 180 percent increase over the forthcoming decade would not be achieved without a corresponding rise in the number of hotel rooms (Rider Hunt, 1994). Within Queensland Garry Draffin, as the new chief executive of QTTC, was aiming to increase development of tourism through assistance to investors (Rider Hunt, 1994).

4.5.5.1 Sunshine Coast - Recovery Period: 1992 - 1994

After the national economic downturn at the beginning of the 1990s, the Sunshine Coast was expected to be at the forefront of the recovery. This was due to the higher population growth rate and the resultant need for building activity, combined with its role as an established tourist destination, the flow on effects of tourism activity, low vacancies in 'prime' retail and office space, available workforce, desirable lifestyle, and its proximity to Brisbane and an international airport, via dual lane highways (Rider Hunt and Partners, 1992). Over this three year period, a number of signs indicated recovery, while others such as capital investment and employment appeared to lag behind (Rider Hunt, 1994).

Approvals for both units and houses on the Sunshine Coast had jumped by the end of 1991, and continued to rise the over the following two years (Rider Hunt and Partners, 1992, 1993). In the unit sector, the six and twelve 'pack' projects continued to demonstrate the most growth (Rider Hunt and Partners, 1992). By 1993, units were selling successfully off-the-plan (Rider Hunt and Partners, 1993). However caution was expressed over rising building activity, in order to prevent over building in the residential sector (Rider Hunt and Partners, 1993).

In contrast, there was little activity in the non-residential building sector, with a few small projects beginning by the end of 1992 (Rider Hunt and Partners, 1992).

The plans for The Sands shopping centre to proceed in 1992 was seen as a vote of confidence in the region by a successful company (Rider Hunt and Partners, 1992). By mid 1993 there was considerable activity in the retail building sector, with the Sunshine Plaza expansion under construction, and a number of other projects in the planning stages (Rider Hunt and Partners, 1993).

In 1993, a 120 unit development for Hastings Street was approved (Rider Hunt and Partners, 1993). The development trend was beginning again, and by early in the new year, four projects were in the planning or construction stage (Rider Hunt, 1994). The media began to focus on the Hastings Street developments, highlighting the record prices paid for the exclusive property (Rider Hunt, 1994).

The Sunshine Coast Tourist Board conducted an initiative to increase the profile of the coast among new markets, both national and international (Rider Hunt and Partners, 1993).

With respect to the region's attractions, Underwater World was sold to an Australian company, which planned to expand the facilities and attractions provided, and the Big Pineapple redirected its marketing to international clients and higher income groups. This attraction also planned to extend, incorporating restaurants, retail areas, and 'ecologically themed' attractions (Rider Hunt and Partners, 1993).

The Maroochy Shire Council upgraded the runway at the airport, to cater for both increased traffic and heavier aircraft (Rider Hunt and Partners, 1993). Additionally, Maroochy began holding a number of major events, including the Sunshine Surf Classic, Sydney to Mooloolaba Yacht Classic, Mooloolaba Triathlon and the Sunshine Coast Art Group Annual Exhibition (Maroochy Shire Library Service, 1994)

The 1991-1994 Playford Council in Noosa prepared a zero development Development Control Plan for the Marcus High Dunes, between the David Low Highway and the National Park, north of Peregian. After much lobbying the Goss Government supported the plan in 1995 (Gloster, 1997).

4.5.6 The Unstable Period: 1995 - 1997

In 1995, the Queensland economy recorded zero growth. This unexpected drop was affected by the improving economic climate in the Southern States, lower northward migration, the sudden drop in activity in the housing sector, the ongoing drought in the rural areas, and the reduction in tourism growth due to the limited supply of hotel rooms, particularly for international guests (Rider Hunt, 1995).

In late 1995 the State Labor Government was voted out and Rob Borbidge, a past Gold Coast motel operator became Premier (Walker, 1995). The change back to the conservative coalition, was seen as a potential return to growth, investment and development for the state (Rider Hunt - Midwood, 1996). The Queensland Treasury, after comparing various industries, revealed that tourism was the state's biggest revenue generator (Midwood - Tourism & Development, 1996).

Labor was also voted out at the 1996 Federal election, with John Howard elected as Prime Minister, ending thirteen years of Labor rule (Kelly, 1999). The Howard government continued economic reform, furthered trade liberalisation, continued deregulation of the finance sector, and increased privatisation (Macintyre, 1999). The budget aimed to 'put money back into the pockets of families'. This was seen as positive for domestic tourism. In addition superannuation contributions became 'less attractive' to high income earners, resulting in increased use of negative gearing and property investment. Although interest rates fell throughout 1996, these drops were not enough to bring the Australian dollar down against the Asian currencies (Midwood - Tourism & Development, 1996, 1997).

In 1995 all building sector activity was in decline and confidence in the industry was low (Rider Hunt, 1995). Demand for residential and other building had dropped, with the only exception being activity in the retail sector (Rider Hunt, 1995). The decline in both the residential and non-residential sectors for 1995/96 was unusual as these sectors usually move in opposite directions (Midwood - Tourism & Development, 1996). Numerous public sector projects in Brisbane reached completion during 1995, including the Treasury Casino, the Exhibition/Convention Centre, and the International Airport Terminal (Rider Hunt, 1995). In addition Qantas was floated to the public in 1995 (Atherton & Atherton, 1998; Richardson, 1999). Two main accommodation developments in Brisbane, the Novotel, and

Quay West were also completed that year (Rider Hunt - Midwood, 1996). This left little other construction under way, and further developments were not planned or expected. This situation extended to the national level, with few Federal capital works expected (Rider Hunt, 1995).

In the residential sector the overbuilding of housing and units between 1990 and 1993 caused the drop in activity for 1994 and 1995. Australia as a whole built twice the required number of new houses, with Queensland and Brisbane building 50 percent too many (Midwood - Tourism & Development, 1997). With significantly more new dwellings commenced than the 'underlying requirements', it was expected that the surplus would not be absorbed until 1997 (Rider Hunt, 1995).

The building oversupply was also seen outside the residential sector. According to the Industry Commission report on tourist accommodation there was an oversupply within Australia. Rider Hunt, while agreeing in principle, specified that the location of these rooms still resulted in an undersupply in the main tourist destinations. In addition, a small number of rooms available in various small motels was not the block of hotel rooms required by the overseas wholesalers, particularly the Asian companies (Rider Hunt, 1995). Despite the provision by the Tourism Forecasting Council of 'accurate and timely' forecasts of supply and demand to assist in investment, the growth in visitors was still not being matched by new hotel rooms. In another attempt to support tourism development, the Federal Minister for Tourism brought together representatives from the tourism, construction, property investment, and finance sectors (Rider Hunt, 1995).

Because of the limited supply of affordable rooms in the main tourist destinations, the number of international visitors nights were expected to only increase marginally for 1995 (Rider Hunt, 1995). This rising demand and limited supply which had resulted in higher occupancies was causing operators to raise room rates. This was particularly evident in Brisbane despite the recent opening of two new hotels (Rider Hunt, 1995). Increased room rates in Sydney hotels was causing potential visitors to select more value for money destinations (Midwood - Tourism & Development, 1996). This scenario was expected to spread nationally to other major international destinations. Without overseas promotion repositioning Australian destinations, the higher tariffs were expected to discourage tourists who could choose alternate destinations. This further supported the need for the

construction of budget hotels, required by both domestic and international visitors (Rider Hunt, 1995).

By 1996 the need for hotel rooms, the increased rates, high occupancies, and profitability forecasts culminated in a high level of new hotel commencements for the State. This was the highest value of accommodation projects since 1991 (Midwood - Tourism & Development, 1997). In 1997 there were in fact more beds provided by holiday apartments than by hotels. The holiday apartments had become the preferred type of accommodation for stays of over three nights. Responding to this trend some hotels began to redefine themselves as 'all-suites' with kitchens and other facilities. Motels had diminished in appeal from their heyday in the 1960s and tended to be used primarily for one night stopovers. Old and run-down hotels, motels, and apartments were often remodelled to provide for the increasing numbers of backpackers. In 1997, almost half the Australian supply of backpackers beds were located in Queensland.

During the early 1990s there was a domestic trend towards holidaying in one's state. This affected Queensland more significantly than New South Wales and Victoria (Midwood - Tourism & Development, 1996). However, 1996 appeared to herald the end of this trend as visitors again began to travel further afield (Midwood - Tourism & Development, 1997).

By 1995, six of the top ten overseas markets were Asian, with the three main generators being Japan, Singapore and Korea (Rider Hunt, 1995; Midwood - Tourism & Development, 1996). At that time, the strongest growth within the Asian markets was from Indonesia. In addition there was definite growth in the United Kingdom and Ireland market, partly due to the introduction of new charter flights (Rider Hunt, 1995).

In the four years from 1992, the number of international flights into Brisbane had almost doubled (Midwood - Tourism & Development, 1996). By 1996 the new Brisbane International terminal was the second busiest airport in the country, despite no direct flights from America (Midwood - Tourism & Development, 1996). In 1997 a daily flight from Los Angeles via Sydney was introduced, providing the first direct international connection from America to Brisbane since 1993. Additionally a direct flight from Japan replaced the flight via a Cairns stopover at 4am (Midwood - Tourism & Development, 1997).

The beginning of 1996 saw positive growth in international visitation from New Zealand. The growth of over 40 percent in the number of New Zealanders was attributed to their strengthening economy and the price competition from the increased flights and the new airlines, Kiwi and Freedom Air (Midwood - Tourism & Development, 1996). The Asian market continued to grow in 1996, but the slowdown of the Japanese, was joined by the Thai and Taiwanese. The lower growth was attributed to the rising costs of visiting Australia and the cheaper package deals to America and Europe caused by lower airfares (Midwood - Tourism & Development, 1996, 1997). The number of flights from Europe had dropped but greater concern was expressed about promotion to Europeans of Australia as a 'desert' destination, as Africa was cheaper, nearer and in the same time zone (Midwood - Tourism & Development, 1996). Ultimately lower international visitation was recorded for 1996. This was seen as the result of the increasing value of the Australian dollar and inadequate international marketing (Midwood - Tourism & Development, 1997). At this time QTTC developed a new marketing policy, promoting individual destinations within Queensland, rather than the State as a whole (Midwood - Tourism & Development, 1997).

Drops in the number of international visitors from some Asian markets occurred in early 1997, partially affected by the media presentations of Pauline Hansen, a vocal, right-wing Queensland politician (Midwood - Tourism & Development, 1997). The lower visitation caused the industry to question their reliance on 12 percent growth. This more realistic outlook caused changes, including lower airfares creating more competitive packages. In addition, the Federal Government cancelled the planned budget cuts and instead provided emergency funds to assist the industry (Midwood - Tourism & Development, 1997).

This mid year analysis was supported by the review of the Asian markets at the annual gathering of QTTC's overseas managers. The past growth was not expected to continue. The Japanese economic growth had halted, the Yen had dropped 20 percent in relation to the Australian dollar in the last year, and the focus of the Japanese on 'value for money' resulted in the selection of cheaper overseas destinations. The Taiwanese market had been growing rapidly until American airfares dropped in 1995. In addition, travel agents were receiving less incentives, room rates in Sydney had increased and the Australian dollar was rising. The incredible growth in visitation from Korea was not expected to be maintained, because of their economic situation, government discouragement of overseas travel, and the elimination of visa requirements for Hawaii. Visitation from Singapore appeared more

positive, particularly as Far North Queensland was popular and there was increasing visitation to the Sunshine Coast, which provided families with longer stays in beachfront apartments. However, travel by Singaporeans was affected by the limited airline seats and the resultant increase in airfares. Malaysia was perceived as a growth market, particularly for the Gold Coast. This potential was being assisted by the increasing number of flights (Midwood - Tourism & Development, 1997).

In other international markets, the American situation was improving, with the combined effects of Bill Clinton's visit, publicity about the Sydney 2000 Olympics, word-of-mouth promotion of the unpolluted environment of Australia, and the value for money received with the strength of the American dollar (Midwood - Tourism & Development, 1997). New Zealand also continued the high growth for 1995 and 1996 despite the demise of Kiwi Air (Midwood - Tourism & Development, 1997).

The expected positive end to the year was dashed by the contraction of the South East Asian economies the following month (Midwood - Tourism & Development, 1997). This 'Asian Economic Crisis' affected numerous Asian countries and resulted in an immediate decrease in what had been the high-growth visitor markets for Australia (Richardson, 1999). The decrease in international visitors from January to June 1997 to 1998 was 80 percent for South Korea, 52 percent for Thailand, 47 percent for Indonesia, and 26 percent for Malaysia (Cockerell & Muqbil, 1998). Although the effect was severe, certain segments of the industry were hit harder than others (Richardson, 1999). Earnings at Australia's 14 Casinos plummeted, and the airlines reduced services to Asia (Cockerell & Muqbil, 1998). Countries were also affected differently as the cost of international travel was either increased or decreased, and tourism strategies varied in their success (Prideaux, 1999b). It is worth noting that the reasons given for the crisis were the same factors given a few years prior for the 'Asian Miracle' (El Kahal, 2001).

At the time of the economic shakeout in October 1997, Australia was considered to be in a sounder state than it had been for many years (Midwood - Tourism & Development, 1997). The Premier was enticing business to Queensland and the seven year drought was over (Midwood - Tourism & Development, 1997). However, the economy was expected to be affected by the drop in the Asian economies, especially in the tourism and mining industries (Midwood - Tourism & Development, 1997).

4.5.6.1 Sunshine Coast - Unstable Period: 1995 - 1997

The upturn in the economy of the Sunshine Coast during the last recovery period appeared to have halted by mid 1995 (Rider Hunt, 1995). However, despite the general slowdown in development, the opportunity to take advantage of low construction costs had enticed some developers with a long term view to begin work in prime locations (Rider Hunt, 1995). By the end of 1996 five large projects had been launched in prime locations, from Kawana to Coolum (Midwood - Tourism & Development, 1996).

Despite the economic changes during this unstable period at the state, national and global levels, the level of confidence in the local Sunshine Coast development industry continued to slowly rise (Midwood - Tourism & Development, 1997). By 1997, projects were increasing in size all along the coast. These developments were generally backed by medium to large developers with proven experience (Midwood - Tourism & Development, 1997). The Sunshine Coast was the only region in Queensland which recorded a higher level of non-residential building in early 1997, compared to early 1996 (Midwood - Tourism & Development, 1997).

Interest rate drops during 1996 did not appear to significantly affect the real estate and development industries on the Sunshine Coast (Midwood - Tourism & Development, 1997). Although residential activity, in terms of both sales and approvals, had dropped in the first half of 1995, the fall was noticeably less than the slide in approvals in other regions, such as Brisbane. This was partially attributed to the rising population, which was absorbing the new dwellings (Midwood - Tourism & Development, 1997). Against the National and State trend the Sunshine Coast, along with the Gold Coast, had matched the population growth with the number of new houses over the first five years of the 1990s (Midwood - Tourism & Development, 1997). The 1996 Census showed that the Sunshine Coast was the fastest growing region in the State, with the population jumping 32 percent since the previous Census (Rider Hunt, 1995; Midwood - Tourism & Development, 1997). In addition, new residents of the Sunshine Coast did not necessarily require finance for their new homes and were therefore less affected by changes in interest rates (Rider Hunt, 1995).

Some unit construction was occurring, focused on prime positions in Coolum, Cotton Tree, Maroochydore, and Caloundra (Rider Hunt, 1995). The only area where an oversupply of units was thought to be potentially occurring was in some areas of Caloundra (Rider Hunt,

1995). Unit sales were progressing, especially in ideal locations, such as close to the water and in the prestige residential market (Midwood - Tourism & Development, 1997). The six units in Noosa Court, a new beachfront property on Hastings Street, all sold prior to completion (Midwood - Tourism & Development, 1997). The site for this development cost \$4367/sq m in 1995. This topped the sale of Annabelle's from the previous year, which went for \$3709/sq m (Midwood - Tourism & Development, 1997).

The nationwide development of non-residential building was evident on the Sunshine Coast, with the focus on commercial and retail projects (Rider Hunt, 1995). This included the \$270 million dollar Sunshine Plaza with a six-screen cinema, as well as a \$7 million dollar expansion to the Big Top Shopping Centre (Maroochy Shire Library Service, 1994). To the north, a shopping centre was opened in Noosaville (Edwards, 2001). Also under way was a review of the plans of existing shopping centres in all three Local Areas as interest continued to focus on expansion in the retail sector (Midwood - Tourism & Development, 1996).

In addition, the construction of a number of strata style one/two bed 'motel' apartments were under way at Mooloolaba, Alexandra Headlands, Maroochydoore, and Sunshine Beach (Rider Hunt, 1995). The local developers believed there was a growing market for this type of accommodation, and they were popular with investors (Rider Hunt, 1995).

By the mid 1990s, Maroochydoore was recognised as the commercial centre of the Sunshine Coast, with its retail and commercial developments assisted by the banks, national retailers, and Government Departments (Rider Hunt, 1995). Substantial growth of the CBD area was expected to occur over the following fifteen years. To incorporate the forecast doubling in jobs, the focus was on a number of 15-storey office towers, rather than a sprawling city environment (Rider Hunt, 1995). A draft strategic plan for the Maroochy Shire aimed to incorporate 200,000 residents and visitors by 2006. The plan was released to criticism by environmentalists who considered the proposal to be encouraging 'Los Angeles-style development' (Rider Hunt, 1995). The CBD area of Mooloolaba was also reviewed, with the remodelling focusing on a pedestrian-friendly promenade, and a scenic beachfront (Midwood - Tourism & Development, 1996).

By 1995, height restrictions in the Maroochy Shire followed those established in Noosa. New three storey limits came into effect for Buderim and Coolum (Rider Hunt, 1995). Although the proposed three storey limit in Alexandra Headlands was not passed, higher development necessitated consent by the Council (Midwood - Tourism & Development, 1997). Building height restrictions in Noosa Shire were a maximum of four storeys for high density residential areas, three storeys for medium density residential/commercial areas, and all other areas were restricted to two storeys (Rider Hunt, 1995).

Despite stricter height constraints, the Maroochy Council relaxed restrictions on site population, site coverage and landscaping to approve a ten-storey unit and retail project on Mooloolaba Esplanade (Midwood - Tourism & Development, 1997). The Council was also considering a 17-storey hotel development if it complied with the original application (Midwood - Tourism & Development, 1997). One approval, for an expansion of Sunshine Plaza, caused an outcry from the community, with over a thousand objections, on the basis that the region was already 'overshopped' (Midwood - Tourism & Development, 1997).

Noosa Council was also approving new developments, with a resort and conference centre planned for Tewanin, on the site of the Noosa Lakes Motel (Midwood - Tourism & Development, 1997).

In general, development plans for Caloundra City were lower than the other Shires. This was attributed to uncertainty surrounding the new Town Plan of 1996 (Midwood - Tourism & Development, 1997). One project approved by the Council was a development at Kawana Waters that incorporated a hotel, commercial buildings, convention centre, retail premises, and food and beverage outlets (Midwood - Tourism & Development, 1997).

In addition to these approved projects, significant future development was expected, with the release of three significant sites on to the market in 1997. These were the Mooloolaba Hotel site, the Maroochydore Hotel site, and the Westpac Bank site in Hastings Street (Midwood - Tourism & Development, 1997).

Results of the 1996 Census showed that Noosa's 'no growth' plan was unable to prevent population growth, with a rise of 7 percent since the 1991 Census. This was the highest

growth rate of the three local areas, although the population in this Shire was still considerably lower than the other areas (Midwood - Tourism & Development, 1997).

At this time, the Noosa Shire Council was planning to cap the population prior to the 1997 council election. This was to be achieved through 'back-zoning' of high density areas, additional restrictions in zoning requirements, and the incorporation of increased 'green belts'. Concern was raised regarding the effects of changing the rules for those with property, and the expected rise in land values as the supply would be further limited (Rider Hunt, 1995). Ultimately the planning scheme to limit the Noosa Shire's population growth to approximately 56,000 by 2006 was passed in 1997 (Prideaux & Cooper, 2002).

At this time the Maroochy Council decided to purchase additional land for the expansion of the Sunshine Coast Airport over the following twenty years, to incorporate a longer runway and facilities to cater to increased passenger and aircraft movements (Rider Hunt, 1995). Upgrading of the Ginger Factory at Yandina was also occurring, aiming to increase exposure and ultimately visitor numbers (Rider Hunt, 1995).

Visitor numbers in other destinations were declining, but visitation continued to increase on the Sunshine Coast. In 1996, there was growth in visitor nights, occupancy rates, takings, and number of rooms, with the greatest rises occurring in the motel category (Rider Hunt, 1995; Midwood - Tourism & Development, 1997). The increased visitation was attributed to the main market of intrastate visitors, primarily budget-conscious families. This corresponded with the national trend of holidaying closer to home. The level of international visitors also increased, particularly from New Zealand and Singapore (Midwood - Tourism & Development, 1997). The local tourism organisations had been promoting to wholesalers and incentive marketers in South East Asia, particularly Malaysia, Singapore, and Indonesia (Rider Hunt, 1995).

A calculation of the average room rate for units in 1996 showed that prices in Caloundra were half those in Noosa, with Maroochy rates in the middle (Midwood - Tourism & Development, 1996). By the following year, the average room rate was \$74, an increase of 16 percent over the preceding two years. This was providing increased returns for investors (Midwood - Tourism & Development, 1997). The rise in rates occurred when the growth in

room nights for hotels, motels and units increased in line with the rise in supply, thereby maintaining the occupancy rates (Midwood - Tourism & Development, 1997).

In 1997, concern was expressed that the Sunshine Coast had a shortage of international resorts, with only the Hyatt, Sheraton, and Twin Waters, all of which had been operating for at least six years. By the end of the year, the rising visitor numbers had resulted in a number of new accommodation proposals (Midwood - Tourism & Development, 1997). One such plan was for a five-star health resort near Landsborough, which would be owned and operated by an Austrian company (Midwood - Tourism & Development, 1997). Another proposal was an international hotel to be added the Wharf and Underwater World complex in Mooloolaba (Midwood - Tourism & Development, 1996).

4.6 Tourism Change Factors

The preceding historical description of the case area illustrates the significant development of tourism at all levels between 1980 and 1997, as well as the variety of factors that influenced the growth. This section focuses on these growth factors by reviewing the types of changes that have occurred. Firstly, the change is considered in the context of the proposed Multi-Trajectory Model of Tourism Destination Change. Secondly, the numerous factors which have affected tourism destination development are identified. These are separated into the change factors at the state, national, and global levels; and the local and regional levels of the tourism case system.

4.6.1 Types of Change

The types of change, presented in the Multi-Trajectory Model of Tourism Destination Change proposed in Chapter Two, included dramatic and gradual change in a positive or negative direction, as well as the maintenance of equilibrium (Figure 2.16).

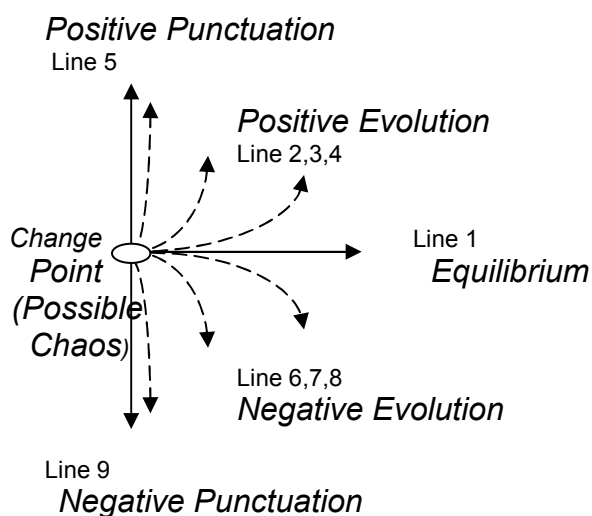


Figure 2.16 (Redrawn) The Multi-Trajectory Model of Tourism Destination Change.

In the case area, there have been examples of these types of change that are relevant to the model. Firstly are events that have dramatically affected tourism development and growth. Creating a dramatic increase in a number of aspects of the tourism system was the hosting of Expo 88 in Brisbane. At the other extreme, a dramatic decrease in travel occurred as a result of the nationwide pilot's dispute in 1989.

Some changes have resulted in a dramatic effect in one sub-section of the industry, with a smaller contribution at an aggregate level. An example of which is the intensive promotion conducted in the mid 1980s which saw a dramatic jump in the number of Americans visiting Australia. This rise and subsequent fall in visitation contributed to a gradual increase in international visitors in the mid to late 1980s.

Other changes have occurred gradually and have therefore resulted in steady change over a period of time. For instance the number of international flights into Brisbane steadily increased through the 1980s and 1990s, catering to a continually growing number of visitors.

Others changes have had less obvious effects, but have still contributed to the overall pattern of tourism development. The specific effect of the release of the Boeing Reports in 1981

and 1986 is unknown. However it is clear that these reports contributed to the growing understanding of the economic benefits of tourism development. The information provided and predictions made were unparalleled at that time. This provided the basis for action undertaken by governments and developers.

4.6.2 Change in the National and State Levels of the Tourism System

A number of types of change have been identified during the research into the history of Queensland and Australia which have affected tourism development at the state, national and international levels of the tourism case area. It is important to note that these factors do not occur in isolation and are instead interconnected elements of the tourism system and its external environment.

4.6.2.1 Tourism Change Factor One - Building Booms

Building of hotels and units appears to occur more in line with building booms, rather than as a result of research data illustrating a growing need for tourist accommodation. In addition the type of accommodation built seems to be aligned with building regulations and the type of building boom, rather than the form and standard of accommodation required by visitors, such as the excess development of units in the early 1980s without visitor trends indicating a need.

4.6.2.2 Tourism Change Factor Two - Level of Promotion

Building of hotels and units appears to occur more in line with building booms, rather than as a result of research data illustrating a growing need for tourist accommodation. In addition the type of accommodation built seems to be aligned with building regulations and the type of building boom, rather than the form and standard of accommodation required by visitors, such as the excess development of units in the early 1980s without visitor trends indicating a need.

4.6.2.3 Tourism Change Factor Three - Cost of Airfares

A dramatic change in the cost of airfares is significant for international visitation levels. For example the cheap airfares in the late 1970s positively affected the number of international visitors. This was in contrast with the world travel trend. Alternatively, the high cost of airfares compared to other international destinations can reduce visitation to Australia. In the mid 1980s the high airfares for trips to Australia was considered to be the main barrier to increased visitors from the United Kingdom.

However, the cost of airfares may be only one of a number of factors affecting destination choice and ultimately visitation levels. For instance the lower level of international visitation in 1997 resulted in a drop in airfares to generate more competitive package deals.

4.6.2.4 Tourism Change Factor Four - Economic Impact of Tourism

There was an increase in the level of understanding of the economic impacts of tourism activity, from the early 1980s through to the last years of the 1990s. This resulted in further investment, earnings, employment, and promotion, which resulted in further research, and increased knowledge regarding tourism, thus keeping the cycle going. The research has highlighted the industry's impact on GDP, employment, balance of payments, local economies, and by 1997/98 a Tourism Satellite Account for Australia had been established.

4.6.2.5 Tourism Change Factor Five - Economic Climate

The economy of Australia can affect tourism activity. The relationship between the national economic climate and the situation in other countries is especially important. There are numerous examples of the effect of the Australian economy on tourism, particularly international travel to and from Australia (Table 4.2).

Table 4.2 Economic Climate.
Changes in the economy of Australia or other countries that have affected travel to and from Australia.

Economic Change	Impact on Tourism
Falling Australian dollar during the mid 1980s	Assisted inbound travel and hampered outbound tourism
Overvaluation of the Japanese yen around 1987	The Japanese outbound market was boosted as the way to capitalise on its buying power was to travel overseas
After the recession of the early 1990s, the Australian dollar began to fall again	Boosted tourism, both domestically and internationally
New Zealand economic recovery and strengthening dollar in 1993	A jump in visitation from New Zealand
In 1996 the Australian dollar began to increase in value	Australia recorded lower international visitation
By 1996/97, the Yen had dropped 20% in relation to the Australian dollar	Growth in Japanese visitation levelled out
The rising Australian dollar in relation to other Asian countries	The growth in level of Asian visitors slowed by mid 1997
At the same time, the American dollar was still stronger than the Australian dollar	Australia was a 'value-for-money' destination for US travellers
Asian economic crisis of 1997	Dramatic drop in visitation from Asia
Devaluation of the Australian dollar relative to the US, UK and other European currencies after the Asian downturn of 1997	Provided a short-term opportunity for increased inbound travel from these regions

4.6.2.6 Tourism Change Factor Six - Government: Tourism

Throughout the 20th Century the role of Government in tourism has developed. Such involvement has included the establishment of government bureaus, departments, and agencies, and support for tourism through promotion, funding, and research. The level of involvement has fluctuated depending on the priorities of each ministry and the economic health of the tourism industry. Illustrating the effect of external conditions on government support for tourism was the change from planned Federal budget cuts to emergency funding following the Asian economic crisis in 1997.

4.6.2.7 Tourism Change Factor Seven - Government: Non-tourism

Government policies regarding a range of issues can also affect tourism development. These include the economy, business, taxation, investment, and deregulation; building

assistance, requirements and restrictions; immigration and visa requirements; trade, foreign investment, and international relations; mining; and conservation, and natural area management. A specific example was the upgrading of the Pacific Highway. This was funded primarily by the NSW and Federal Government and ultimately assisted travel north to Queensland. However the timing and the extent of the work was well outside the control of the Queensland tourism industry.

4.6.2.8 Tourism Change Factor Eight - Events

Events can have a variety of direct and indirect tourism impacts on the host city, region, and/or country. There were numerous direct impacts of the holding of Expo 88 in Brisbane during 1988. These included a significant increase in international and domestic visitor numbers, and clear diversions from the 'usual' patterns of visitation within Queensland.

A less obvious impact is the role of an event in presenting the host area to a wider audience, whether it be nationally or internationally. For example, the 1982 Commonwealth Games is believed to have put the 'Big Country Town' of Brisbane 'on the map'.

There are also impacts of events that are not specifically tourism but can affect the industry. For example, prior to Expo 88 there was significant building activity to prepare for and capitalise on the event.

4.6.2.9 Tourism Change Factor Nine - Accommodation Supply

Tourism visitation is dependant on the combined factors of supply and demand. However the extent and type of accommodation that is provided by a destination does not always correlate with the level and type of demand. This was exemplified in the mid 1990s when the growth in visitation in Queensland was considered to be limited by the supply of accommodation, rather than the level of demand. Additionally, the specific and well-documented need for budget accommodation for both the domestic and price-sensitive international markets was not met, as new 5-star hotels continued to be built instead.

4.6.3 Change in Regional and Local Levels of the Tourism System

A number of factors have been identified during the research into the history of the Sunshine Coast and its Local Authorities which have affected tourism development at these local and regional levels of the tourism case area. As mentioned, these change factors are all related elements of the tourism system and its external environment.

4.6.3.1 Tourism Change Factor One - Stakeholder Vision

The type of development and the aims of stakeholders can affect the direction of development. Such stakeholders include developers, Councillors, conservation associations, and local community associations. For example, in 1980 the plans of Noosa Holdings for development along Hastings Street aimed to change the 'scale and character' of the destination and appeal to top market clientele. Although their aims were not fulfilled at the time, by the end of the decade the first five-star international hotel had opened on Hastings Street, the Sheraton Noosa Resort. The Noosa Council elected in the late 1980s did not support high-rise developments, such as the Sheraton, but their vision was still to attract the top end of the tourist market. This quality, rather than quantity focused Council, under Chairman Playford was still in place in 1997.

4.6.3.2 Tourism Change Factor Two - Local Councils

Local Government determines the town plans for an area, thereby affecting the developer's plans and ultimately tourism development. The lack of town plans in the 1960s resulted in approval for an eight-storey building on the ocean side of Hastings Street. Consequently a plan restricting buildings to three-storeys was introduced. However, this still did not restrict development on the non-ocean side.

The agenda of the Local Councils also directs the development of the area. This often results in periods of pro-development, alternating with environmentally conscious decision-making. In Noosa the 1982 to 1985 Council achieved numerous town planning and conservation gains. This was followed by a pro-development Council who focused on ensuring that the 'inevitable' development occurred in an orderly manner. One of their specific foci was to encourage large-scale residential, leisure and tourism development on the North Shore. The construction of numerous six storey buildings in Hastings Street,

Munna Point, and Noosa Sound, resulted in the realisation by the locals of the impact of such developments, and ultimately voted in a new Council. This Playford Council scaled down the extensive development supported by the previous Council.

4.6.3.3 Tourism Change Factor Three - State Government

Changes in Government at the State level can also affect development at the regional level. For example, the State Government extinguished the Maroochy beachfront National Park in 1958 for the development of the airport, hotels, and the suburbs of Marcoola and Mudjimba.

4.6.3.4 Tourism Change Factor Four - Federal Government

Decisions made by the Federal Government can support or override regional and/or State decisions, thereby shaping the development of the region. For example the approval and control of mining is a state responsibility, but as the export of minerals is a commonwealth function, the federal government intervened to prevent sand mining on Fraser Island.

4.6.3.5 Tourism Change Factor Five - Planning Requirements

Length of time required for the planning, financing, approval, and commencement of projects, often results in a changes in Government during the process. This can be especially pertinent for changes in the Local Council or the State Government. For example, the Noosa Council agreed to T.M. Burke's plan to develop a town plan for the coastal strip, running south from Sunshine Beach to Peregian Beach, and incorporating a new arterial road. However, by the time Main Roads announced this planned eastern route almost a decade had passed and the newer environmentally conscious Noosa Council blocked its construction.

4.6.3.6 Tourism Change Factor Six - Nature

The weather and natural disasters, such as cyclones and coastal movements, can affect existing and future coastal developments. On the Sunshine Coast this has particularly affected Noosa Heads, along Main Beach and on Noosa Spit. In addition, the impact of the 1967/68 cyclone season resulted in the introduction of the Queensland Beach Protection Act to protect the foredune area of beaches that had not already been built upon.

4.6.3.7 Tourism Change Factor Seven - Financial Difficulties

The financial state of the developers affects the timing and progression of development plans. This may be the individual situation of a developer, or a reflection of the nation-wide economic climate. As a consequence of the building bust of the early 1980s, many companies, such as Noosa Holdings were declared bankrupt. This prevented their large-scale, international resort plans from going ahead.

4.6.3.8 Tourism Change Factor Eight - Local Associations

Community protest and conservation orientated associations can also affect tourism development. The pro-development Noosa Council of the mid 1980s was opposed by the pro-conservation Noosa Parks Association for their three year term. Ultimately each was generally able to stalemate the plans of the other, but not achieve their own goals.

4.6.3.9 Tourism Change Factor Nine - Combining Forces

Although opposed on many issues, sometimes different parties can unite for a common goal. Despite being on different sides on the Noosa National Park issue during the 1960s, T.M. Burke, the Noosa Shire, the Maroochy Shire, the local residents and the environmentalists, all opposed the granting of a sand-mining dredging lease in the 1970s.

4.6.3.10 Tourism Change Factor Ten - Retirement Destination

The Sunshine Coast has also been affected by its development as a retirement destination. By 1986 the growing popularity of Retirement Villages had resulted in a number of developments of the Sunshine Coast and studios began to sell. This has affected the social structure and infrastructure needs.

4.6.3.11 Tourism Change Factor Eleven - Accessibility

The level of access is one of the most important factors determining the rate of general growth, and therefore tourism development. The lack of easy access to the seaside towns in the early 1900s severely restricted their progress. In the later 1900s, the development of airline services and multi-lane highways significantly improved and enhanced all aspects of tourism expansion.

4.6.3.12 Combination of Tourism Change Factors

The change factors described above interact over time. The particular combination and the timing of the various changes can affect the development of the destination.

The reason that large-scale development does not occur is not necessarily because of limiting legislation, community opposition, or economic forces, but the combination of these forces. For example, in 1969 the Noosa Council approved an eight storey resort development for the ocean side of Hastings Street in 1969. This was granted because there was no town plan for Hasting Street and therefore no limit to what could be approved. The approval for the project lapsed due to the financial difficulties of the developer. An extension was applied for, but not granted. The Council determined that the foreshore was part of the newly defined Beach Erosion Control Area under the Beach Authority Act and the proposed type of development was not considered appropriate. This situation was therefore affected by the combination and timing of Local Council regulations, developers plans, financial difficulties, and State regulations.

4.6.4 Tourism Change

The development of tourism within Australia and Queensland, and more specifically on the Sunshine Coast, has not been solely the result of specific individual decisions and events, but the combination of these inter-related changes and their flow on effects. Tourism development is ultimately affected by the general flux of all aspects of development globally, nationally, and locally. This thereby incorporates changes within the public and private sectors of the tourism industry, non-tourism specific government policies at the Federal and State levels, building and investment by Australians and foreigners, and the economic state of Australia within the global setting.

In addition, tourism as an industry is part of and contributes to the economy. This perception of tourism changed from the earlier view of tourism simply being an activity people do on holidays. The development of tourism throughout the last two decades of the 20th Century has resulted in tourism being recognised as an industry that is part of the international economy. At the local or regional level, tourism can be the primary driver of development. In the case area of the Sunshine Coast the contribution of tourism to the local

economy in 1998/99 was greater than the contribution by any other industry (OESR, 2004b). This significant role of tourism in the economy of the Sunshine Coast in 1998/99 was greater than for any other destination in Queensland.

4.7 Revisiting the Research Issues

This section revisits the three research issues derived from the Multi-Trajectory Model of Tourism Destination Change, presented in Chapter Two. This is used to identify data variables that can be analysed in Chapter Five to determine whether the research issues, and therefore the proposed model, are supported by the data on change in this tourism system.

Progressive growth of the case area, along with the apparently chaotic nature of the development of the Sunshine Coast made it an ideal candidate for testing the model.

The development of tourism in the three areas of the Sunshine Coast, within the Queensland, Australia, and global contexts, exemplifies the different types of change proposed by the Multi-Trajectory Model of Tourism Destination Change developed in Chapter Two.

There are three research issues resulting from this proposed model, the demonstration of which would support the model.

4.7.1 Research Issue One - Area Aggregation > Data Smoothing

The first Research Issue states that: **although tourism change can be analysed at various levels, area aggregation results in data smoothing.** An aggregate measure of tourism change, while providing an overview, does not illustrate the underlying change and complexity that occurs within a tourist destination, or the variation that may exist within sub-areas.

Providing support for this first Research Issue would be any tourism or growth variable that has been measure over time for various levels of the study area, particularly the lowest level of the three Local Government Areas. Data variables which could be used to demonstrate

area aggregation in the study area include those related to population, building activity, visitation, and tourism accommodation.

To illustrate the effect of data smoothing a tourism variable and a general growth variable were selected. The tourism variable was the supply of accommodation in the hotel, motel, and guest house sector, and the growth variable was population.

Over the 1980 to 1997 period reviewed in this chapter, the level of accommodation supplied on the Sunshine Coast has grown, to cater to the increased visitation. Of the various types of accommodation, the hotel, motel and guest house sector has seen significant development since 1980, including the additional of the prominent international hotel properties. This variable can be analysed in terms of the total number of properties and the total number of rooms provided by these establishments. Analysis of both these variables will identify whether the level of growth on the Sunshine Coast is similar to the patterns at the higher State and National levels. Conducting the analysis at the Local Area level will demonstrate whether growth was uniform across the destination, or whether parts of the region experienced growth at different times, or in differing amounts.

As discussed in this chapter, there has been significant population growth on the Sunshine Coast, which has been higher than the State and National trends. If area aggregation results in data smoothing it would be expected that the yearly population change on the Sunshine Coast would have fluctuated more than the State and National data. In addition the growth pattern of the Sunshine Coast population can be analysed in terms of the changes in the three Local Areas. This may also reflect the differing policies of the Local Governments regarding population growth, for example, the population cap for Noosa.

4.7.2 Research Issue Two - Change Not Explained By Visitor Numbers

The second Research Issue states that: **tourism change cannot be explained by total yearly visitor numbers alone**. Total visitor numbers is an aggregation of all types of tourists. As an aggregate measure of tourism change, this measurement also fails to describe the underlying change, complexity, and variation that may exist within sub-classifications.

This overall measurement can be broken down in a variety of ways, such as origin, type of accommodation, or product markets. In addition, a measure of total visitor numbers alone does not illustrate changing patterns within the data. Factors such as the length of stay and visitor expenditure level have significant impact on yield, and cannot be determined by visitor numbers alone. This second research issue has three sub-issues (Table 4.3).

Table 4.3 The Three Sub-Issues of Research Issue Two

Research Issue Two	Description	Data Variables
Sub-Issue One	The pattern of total visitor numbers does not represent the underlying variation of sub-categories	Visitors to the Sunshine Coast by <ul style="list-style-type: none"> • Origin • Accommodation used • Stage of life Visitors to Australia by <ul style="list-style-type: none"> • Origin
Sub-Issue Two	Yearly data obscures seasonal variation	Sunshine Coast visitation by <ul style="list-style-type: none"> • Intrastate visitors • Interstate visitors • International visitors • Total visitors Sunshine Coast occupancy rates <ul style="list-style-type: none"> • Hotels, motels & guest houses • Caravan parks
Sub-Issue Three	Other data needs to be analysed alongside visitor numbers to determine the effect of changing trends	Sunshine Coast visitation <ul style="list-style-type: none"> • Average length of stay • Visitor expenditure • Takings by accommodation providers • Occupancy rates

The first Sub-Issue states that the pattern of total number of visitors does not represent the underlying variation of sub-categories. Providing support for this Sub-Issue would be any variable of visitation that has been measured over time and separated into sub-categories. Data variables which could be used to demonstrate whether there is underlying variation include those related to origin, accommodation used, transport used, stage of life, age, and nationality. Additionally a measure of visitation can be conducted for the number of visitors, or the number of visitors nights, which is the result of the number of visitors and their length of stay. To illustrate the underlying patterns of sub-category visitation, four variables were selected: visitors to the Sunshine Coast by origin, by accommodation used,

and by stage of life; and visitors to Australia by country of origin. Wherever possible, multiple sources of data were utilised.

The second Sub-Issue states that yearly data obscures seasonal variation. The use of yearly visitor numbers conceals the seasonal variation which is often significant in tourism destinations. Providing support for this Sub-Issue would be variables on visitation levels that have been measured over time, at quarterly or monthly intervals, such as the number of visitors and occupancy levels. Both these variables were selected, utilising sub-categories. Total visitor numbers by quarter were separated into intrastate, interstate, and international. In addition, the monthly occupancy levels were analysed for two forms of accommodation: Hotels, Motels, and Guest Houses; and Caravan Parks.

The third Sub-Issue proposed that other data variables need to be analysed alongside visitor numbers to determine the effect of changing trends. Providing support for this Sub-Issue would be tourist variables on aspects of visitation that have been measured over time, including length of stay, occupancy rates, visitor expenditure, and takings by tourism operations, such as accommodation providers. These variables were all measured for the Sunshine Coast.

4.7.3 Research Issue Three - No Predetermined Pattern

The third Research Issue states that: **there is no predetermined pattern of tourism destination change**. Instead of the expectation that a destination will probably progress sequentially through the stages of the Destination Life-Cycle, this Multi-Trajectory Model of Tourism Destination Change illustrates that at any given time during its life, a destination may 'change' to follow any one of the five trajectory options. Within this Research Issue there are three Sub-Issues which relate to the destination pattern of change (Table 4.4).

The first Sub-Issue states that tourism-related data variables exhibit different patterns. If there is no predetermined pattern, then data variables will exhibit different patterns over time. Providing support for this Sub-Issue would be any collection of tourism-related variables that have been measured over the same time frame. To determine whether this sub-issue holds true even within a sector of the industry, the hotel, motel and guest house sector was selected for analysis. This sector has been included in previous issues, however a

comparison of the different variables within this sector would determine whether tourism variables exhibit different patterns.

Table 4.4 The Three Sub-Issues of Research Issue Three.

Research Issue Three	Description	Data Variables
Sub-Issue One	Tourism-related data variables exhibit different patterns	Hotel, Motel & Guest Houses <ul style="list-style-type: none"> • Occupancy • Visitor numbers & total rooms • Takings & expenditure on accommodation • Visitor numbers, total rooms, occupancy & takings
Sub-Issue Two	The last stage does not predict the next stage	Comparison of variables during the boom and bust periods
Sub-Issue Three	Trajectory lengths are not predetermined	Comparison of variables during the boom and bust periods

The second Sub-Issue states that the current trajectory does not have a predetermined life. If there is no set pattern for tourism destination development, one trajectory option does not last for a preset period of time. To determine whether the one trajectory has a predetermined duration, a six year time frame was selected when tourism in Australia generally experienced an expansion followed by downturn. These two periods, the ‘Tourism Boom’ and ‘The Recession’ were discussed in this chapter. If there was a preset ending to a trajectory, analysis of such a situation would be expected to exhibit a growth trajectory followed by a declining trajectory across the eight tourism-related variables, which have previously been presented.

The third Sub-Issue states that the last stage does not predict the next. This Sub-Issue follows on from the first Sub-Issue, which stated that there is no set pattern for tourism destination development. If the pattern of change in the period analysed can be any one of the trajectories of the Multi-Trajectory Model of Tourism Destination Change, or a combination of these options, then one stage does not automatically follow another. To determine whether the one trajectory precedes another, the six year time frame and the eight variables utilised for the previous Sub-Issue were selected. If the ordering of the trajectories was consistent, such a scenario would be expected to produce a growth trajectory followed by a declining trajectory across the tourism-related variables.

4.8 Conclusion

This chapter has summarised the development of tourism in the case area, in the context of the wider social, economic, and political changes. The information provides support for the time series data presented in Chapter Five. Patterns in the data can therefore be understood in relation to the context in which they occurred.

The chapter also reviewed the Research Issues derived from the proposed Multi-Trajectory Model of Tourism Destination Change, and identified the data variables to be used to test each Research Issue in the following chapter.

Chapter 5 Tourism Destination Case System - A Time-Series Analysis

5.1 Overview of Chapter Five

This chapter tests the proposed Multi-Trajectory Model of Tourism Destination Change developed in Chapter Two, using the tourism case system introduced in Chapter Four. This is achieved by addressing each of the Research Issues and Sub-Issues derived from the Multi-Trajectory Model of Tourism Destination Change (Section 2.7.1). The demonstration of these issues, through the presentation and analysis of tourism-related data variables, provides support for the proposed model. The data variables to be used to test each of the Research Issues were identified in Chapter Four (Section 4.7).

The Sunshine Coast region is a destination that has experienced significant tourism growth. This has occurred within the contexts of the wider State, National, and Global tourism systems. As discussed in Chapter Four, tourism had been a part of the Sunshine Coast throughout the 20th Century. However, the major part of this development has occurred since 1980. Data on this growth was generally recorded using a consistent methodology until 1997¹⁷. Consequently this provides the general time boundary of the quantitative data variables used to establish whether the proposed model fits observed data.

5.2 The Research Issues

Chapter Two reviewed four theories on the process of change and their application to the phenomenon of tourism destination development. While none of the theories provide a complete explanation of the complex changes that occur in a destination, all offer important concepts which assist in understanding tourism development and growth. These concepts

¹⁷ Some minor changes to the methodology have occurred over time, including boundary adjustments, and changes in definitions, such as the required number of rooms for a unit/apartment to be included in the data collection.

provided the basis for the development of the Multi-Trajectory Model of Tourism Destination Change, presented in the final section of Chapter Two (Figure 2.16).

This Multi-Trajectory Model of Tourism Destination Change proposes that the growth pattern of a tourism-related variable may at times be in a state of complete ‘equilibrium’, undergoing gradual positive or negative ‘evolutionary’ change, or within a ‘chaos’ induced ‘punctuation’ that is causing an immediate, and substantial increase or decrease in growth. This relates directly to the stated aim of this work (Section 2.8). Therefore support for the proposed model would indicate that tourism destination change occurs as a combination of equilibrium, gradual evolutionary changes, and dramatic punctuations caused by the agents of chaos. The data analysis in this chapter will identify if these different trajectories are evident in the change patterns of the data variables in the tourism case system.

In Chapter Two the Multi-Trajectory Model was used to derive three Research Issues and six Sub-Issues (Figure 5.1). The first two Research Issues are the underlying basis to the model.

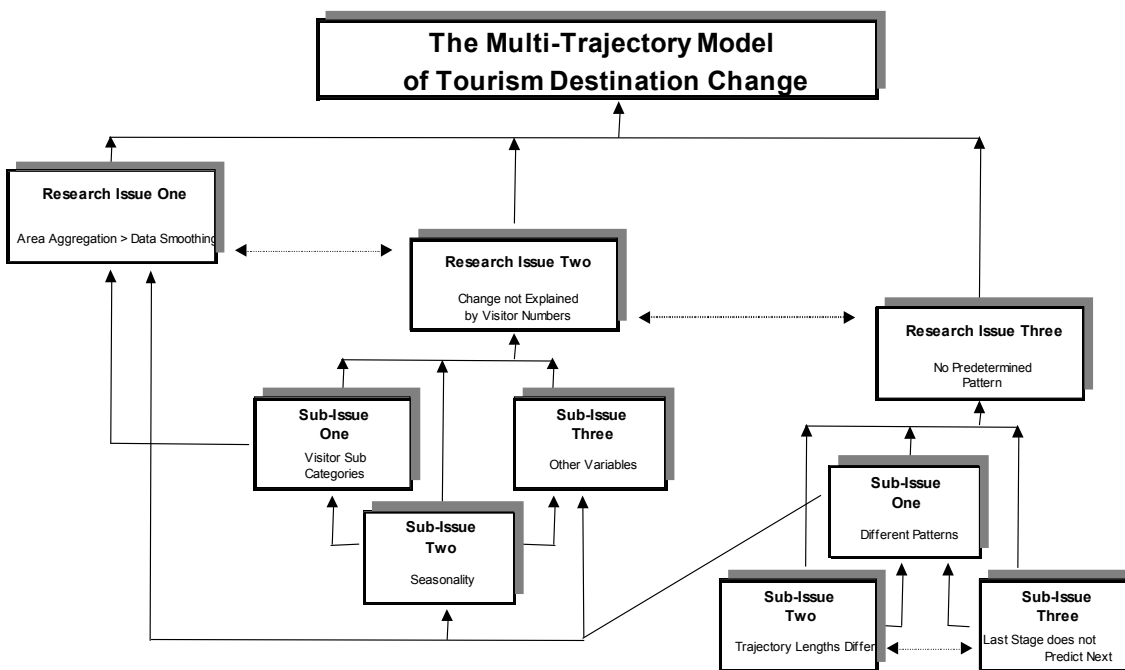


Figure 5.1 The Research Issues and Sub-Issues of the Proposed Model. The Relationships between the research issues and sub-issues that provide the foundation for the Multi-Trajectory Model of Tourism Destination Change.

Research Issue One considers the change in the pattern displayed by a data variable at different geographical levels. The general premise being that the greater the aggregation, the smoother the data pattern. Ultimately the variation within a data pattern, and the different trajectories displayed, needs to be considered in relation to the geographical level under analysis. In addition, this Research Issue highlights the applicability of the proposed model to the various geographic levels.

Research Issue Two addresses the limitations inherent in describing the change in a tourism destination simply through the analysis of yearly visitor numbers. The three Sub-Issues demonstrate the variation in the patterns of underlying and related data variables by considering firstly, the sub-categories of visitor numbers, secondly, the seasonality within yearly totals, and thirdly, other variables which assist in providing a more complete picture of the changes occurring within a destination. Additionally, in examining this second Research Issue the application of the proposed model to an array of data variables, many of which were collected by different agencies applying a range of methodologies, at various geographical scales, and using a number of time frames, is examined.

The third Research Issue and its Sub-Issues relate to the pattern of change exhibited by destination data variables, as the culmination of the various trajectories proposed by the Multi-Trajectory Model of Tourism Destination Change. This is embodied in Research Issue Three which states that there is no predetermined pattern. The concept is supported through the demonstration of the three Sub-Issues. The first Sub-Issue addresses the different types of patterns of change that occur, the second considers the unspecified duration of a stage or trajectory, and the third relates to the lack of order in stage progression.

The linkages between the Research Issues (Figure 5.1) illustrate the relationships between the Issues and Sub-Issues. There are strong links between certain issues (unbroken lines) as well as secondary linkages (dashed lines). These links show that the explanation of one issue may also provide support for other issues. Ultimately the demonstration of all these issues is a basis for supporting the Multi-Trajectory Model of Tourism Destination Change in relation to the tourism case system analysed in this work.

5.3 Research Issue One - Area Aggregation

The first Research Issue states that: **although tourism change can be analysed at various levels, area aggregation results in data smoothing.** While an aggregate measure of tourism change provides an overview it does not describe the underlying change and complexity that occurs within a tourism destination, or the variation that may occur within sub-areas. This is addressed by the proposed Multi-Trajectory Model of Tourism Destination Change.

This Research Issue will be addressed through an examination of the patterns of change displayed by variables at different levels of the case area. As determined in Chapter Four, a tourism variable, the supply of accommodation in the hotel, motel, and guest house sector was selected, in conjunction with a general growth indicator, population change.

5.3.1 Supply of Hotel, Motel and Guest House Accommodation

Part of the development of tourism over the last twenty years of the 20th Century included the change in the number and capacity of accommodation operations. Data on the type of accommodation, as provided by the Australian Bureau of Statistics (ABS), has been collected for three categories: firstly hotels, motels, and guest houses; secondly self-contained flats, units and houses; and thirdly caravan parks.

This analysis will focus on the hotel, motel, and guest house sector, using the quarterly data on both the number of establishments and the total number of rooms. This data is analysed at the Local, Regional, State, and National levels to determine the effects of smoothing as the areas are aggregated. The data on the number of rooms has also been analysed using a Lowess Scatter-Plot Smoother to establish the long-term trend (as described in Section 3.4.3). This identifies the growth trajectories within this variable, for each of the different layers of the tourism case system.

5.3.1.1 Number of Establishments

The past 20 years have seen a small rise in the number of hotels, motels, and guest houses within the Sunshine Coast Statistical District (Figure 5.3). In 1983, the total number of establishments in the region was 62. Ten years later the number peaked at 83 before dropping to 75 by 1997.

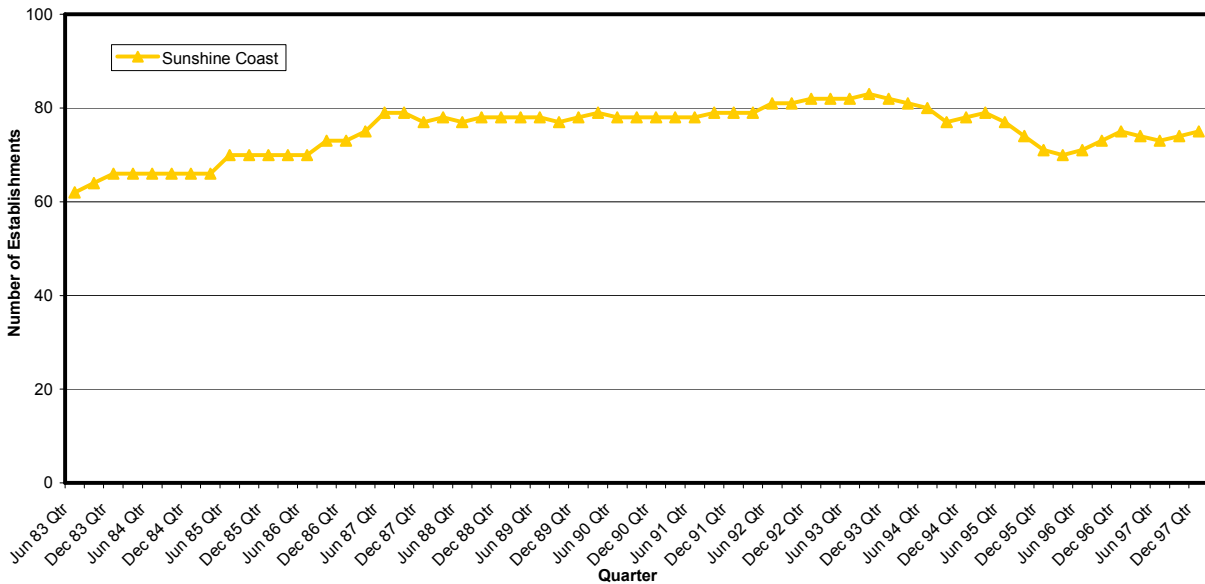


Figure 5.3 Number of Hotels, Motels, and Guest Houses in the Sunshine Coast Statistical District. (Quarterly: 1983 – 1997) (Source: ABS 8635.3 Tourist Accommodation)

This growth in the number of hotels, motels, and guest houses on the Sunshine Coast can be separated into the number in each of the three Local Government Areas (Figure 5.4). This data is provided from 1988 to 1997, as the earlier data is not available at the local level.

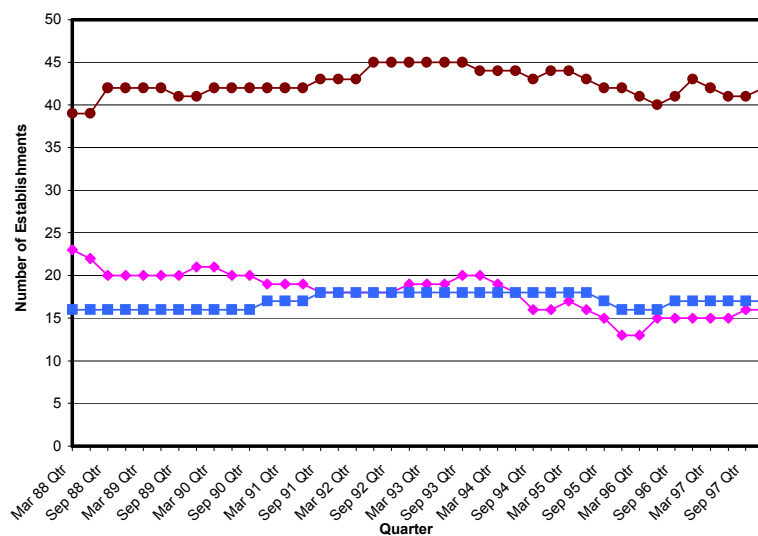


Figure 5.4 Number of Hotels, Motels, and Guest Houses in each of the Three Local Government Areas within the Sunshine Coast Statistical District. (Quarterly: 1988 – 1997) (Source: ABS 8635.3 Tourist Accommodation)

The total number of establishments within the Sunshine Coast (Figure 5.3) is the sum of the number in each local area, but it can be seen that the overall regional pattern is not representative of the growth in each area.

Within the Sunshine Coast region, the majority of hotels, motels, and guest houses were located in the Maroochy Shire. The remainder were split between the other two local areas, with the number in the Noosa area dropping below the Caloundra contribution in the mid 1990s. The number in Caloundra remained relatively stable, only ranging between 16 and 18 establishments throughout the decade. The greatest absolute fluctuation occurred within Noosa, where the number of establishments dropped from 23 to 13 between 1988 and 1995, before rising to 16 by the end of the 1997.

At the regional level, there was a small increase in the number of hotels, motels, and guest houses between 1988 and 1993. This was in fact comprised of a rise in the number of establishments in Maroochy and Caloundra, combined with a drop in the number in Noosa. Such a scenario illustrates how area aggregation masks underlying change patterns.

The reduction in the regional number of hotels, motels, and guest houses, through 1995 and the early months of 1996 reflected a drop in all three areas, although the timing and extent of the decline differed across the three local areas. The different patterns exhibited by each of the local areas illustrates the effect of smoothing that occurs when the number of establishments is amalgamated to the regional level.

As with the regional rise in the number of hotels, motels, and guest houses, the Queensland level also rose over this fourteen year period (Figure 5.5). In 1983, the total number of hotels, motels, and guest houses in the State was 875. By 1997, this had grown to almost 1200.

At both the state and regional levels, there was growth in the number of establishments from 1983 to mid-1987, although the patterns differed. At the regional level, the growth appeared to occur in a step like pattern. This was obscured at the State level, as the aggregate of all the regions in Queensland resulted in a smoother growth trajectory.

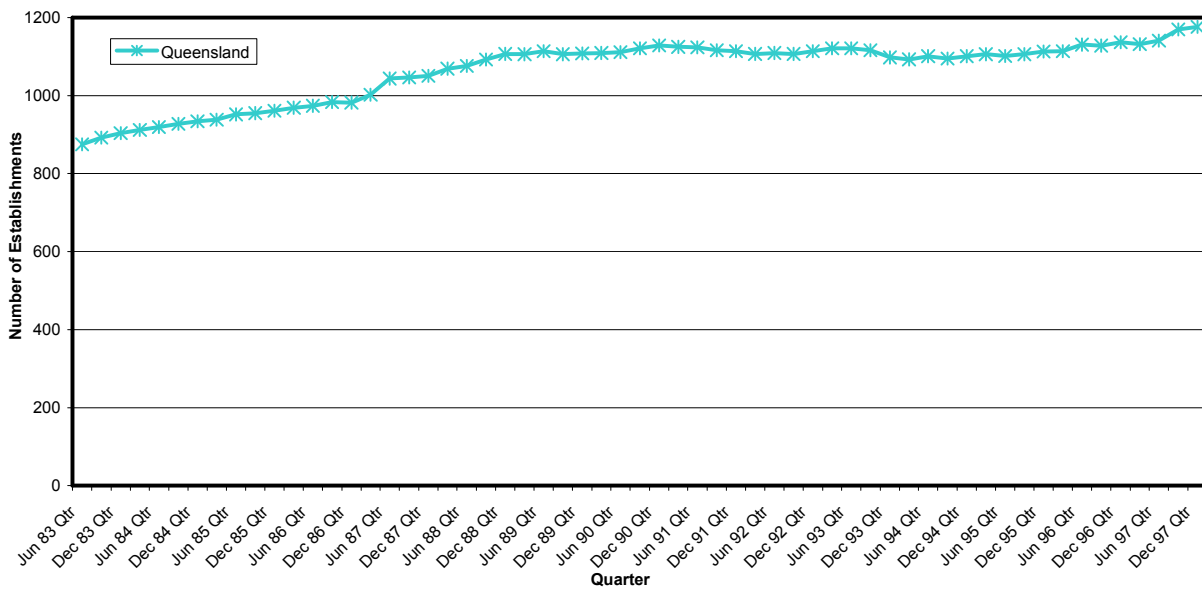


Figure 5.5 Number of Hotels, Motels and Guest Houses in Queensland.
 (Quarterly: 1983 – 1997)
 (Source: ABS 8635.3 Tourist Accommodation)

Another difference between the data at the state and regional levels, is that the drop in the mid 1990s that occurred on the Sunshine Coast is not evident at the Queensland level. The decline in the number of hotels, motels, and guest houses in the region was offset by increasing numbers in other areas of the state.

As the data pattern already appeared to be relatively smooth at the Queensland aggregate, there is less difference between the patterns at the State and National levels. The number of hotels, motels, and guest houses in Australia, like the Regional and State data, also rose during this period (Figure 5.6). Both the patterns of the Queensland and National data show a ‘positive evolutionary’ trajectory from 1983 to 1990, after which both generally exhibit a ‘equilibrium’ stage. This is followed at the State level, by the beginnings of another ‘positive evolutionary’ growth period. This trajectory change is not as apparent at the Australian level, illustrating that development in Queensland may have been higher than the National trend at that time.

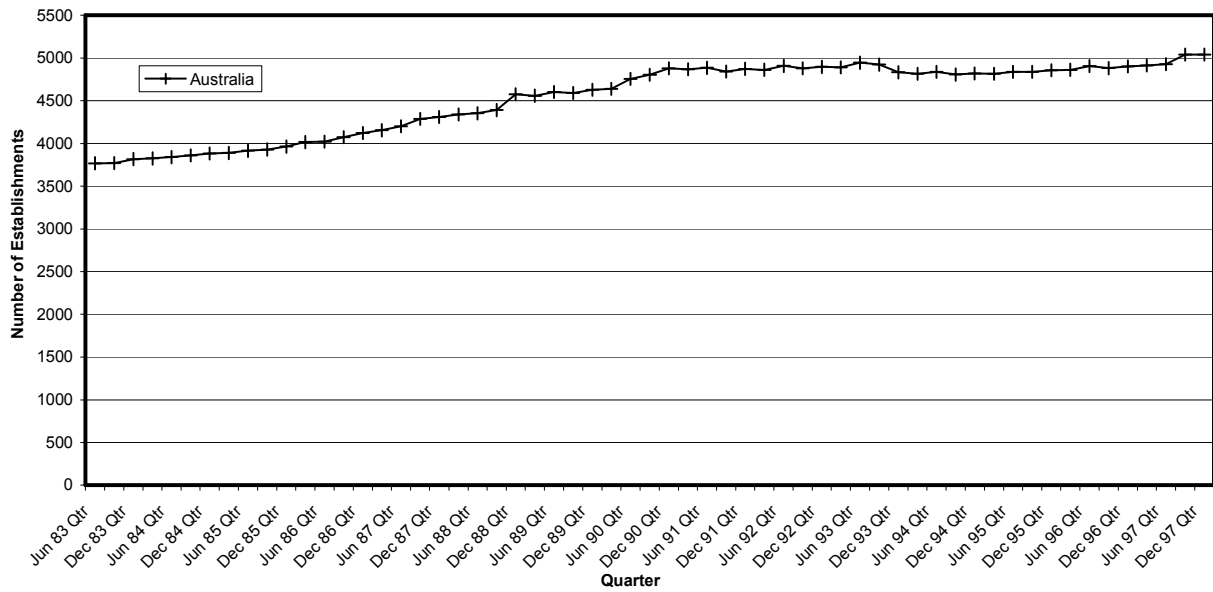


Figure 5.6 Number of Hotels, Motels and Guest Houses in Australia. (Quarterly: 1983 – 1997) (Source: ABS 8635.0 Tourist Accommodation)

5.3.1.2 Total Number of Rooms

In contrast to the small rise in the number of hotels, motels, and guest houses on the Sunshine Coast (Figure 5.3), the total number of rooms provided by these establishments more than doubled over the same time frame (Figure 5.7).

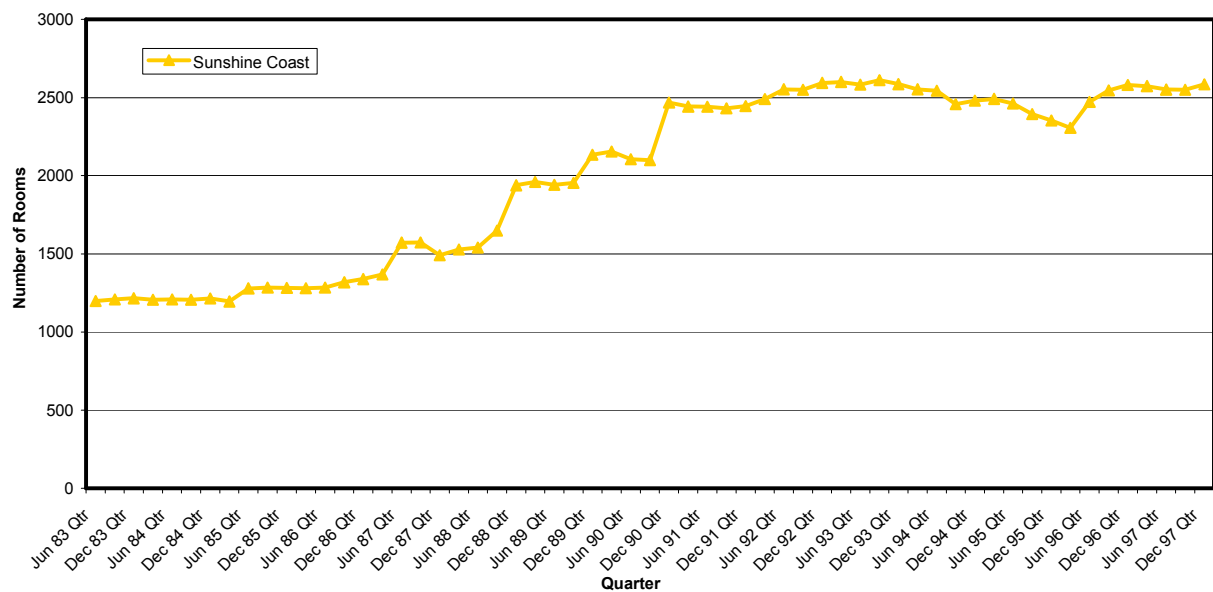


Figure 5.7 Number of Rooms in Hotels, Motels, and Guest Houses in the Sunshine Coast Statistical District. (Quarterly: 1983 – 1997) (Source: ABS 8635.3 Tourist Accommodation)

This growth in the number of available rooms occurred primarily between the beginning of 1987 and the end of 1990. The rise in the capacity of the hotels, motels, and guest houses over this four year period represents a dramatic increase between the early period of gradual increase (1983 to 1986) and the last phase of relative equilibrium (1991 to 1997). To illustrate this overall trend the data has been smoothed (Lowess=0.4) to highlight these general trajectories within the data (Figure 5.8).

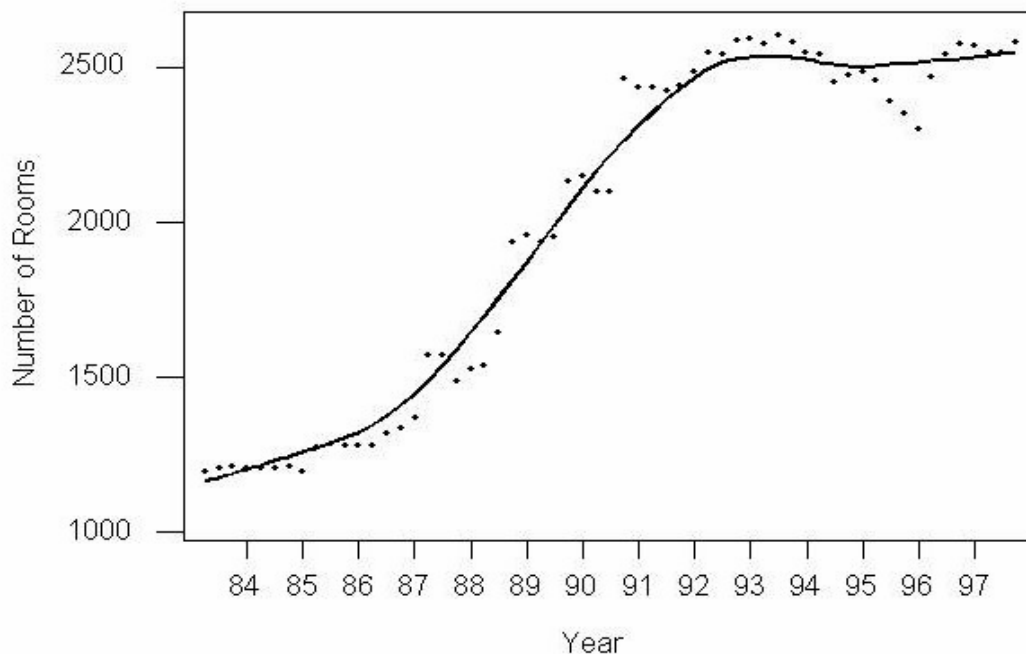


Figure 5.8 Long-Term Trend in the Number of Rooms in Hotels, Motels, and Guest Houses in the Sunshine Coast Statistical District.
(Calculated from: ABS 8635.3 Tourist Accommodation using a Lowess Scatter-Plot Smoother {Lowess = 0.4})

Compared to the six periods discussed in Chapter Four, this Sunshine Coast accommodation development period appears to have lagged behind the nationwide tourism boom period that had begun in 1986. In addition, the completion of projects that were underway appears to have resulted in an extra year of development.

The application of a lower level of smoothing shows both the actual pattern of the change in the variable, as well as the overall trend (Figure 5.9, Lowess=0.1). The pattern of growth between 1987 and 1991 shows that the increase in the number of rooms followed a stepwise pattern. This is due to the opening of a number of large hotels. During the four year growth period, the individual steps in the total number of rooms vary in magnitude depending on the number and size of the new establishments.

The first major step in the number of rooms, which occurred in the second six months of 1988, can be mainly attributed to the opening of the 324 room Hyatt Regency Coolum. The second step in the growth period, in the second half of 1989, is the result of the opening of the 169 room Sheraton Noosa Resort. The last step in the growth period, in the second half of 1990, is partially due to the opening of the Twin Waters Resort. After each sharp increase in the total number of rooms, there is a gradual decline before the next large increase. This may reflect change in the competitive environment as low yielding rooms drop out of the market.

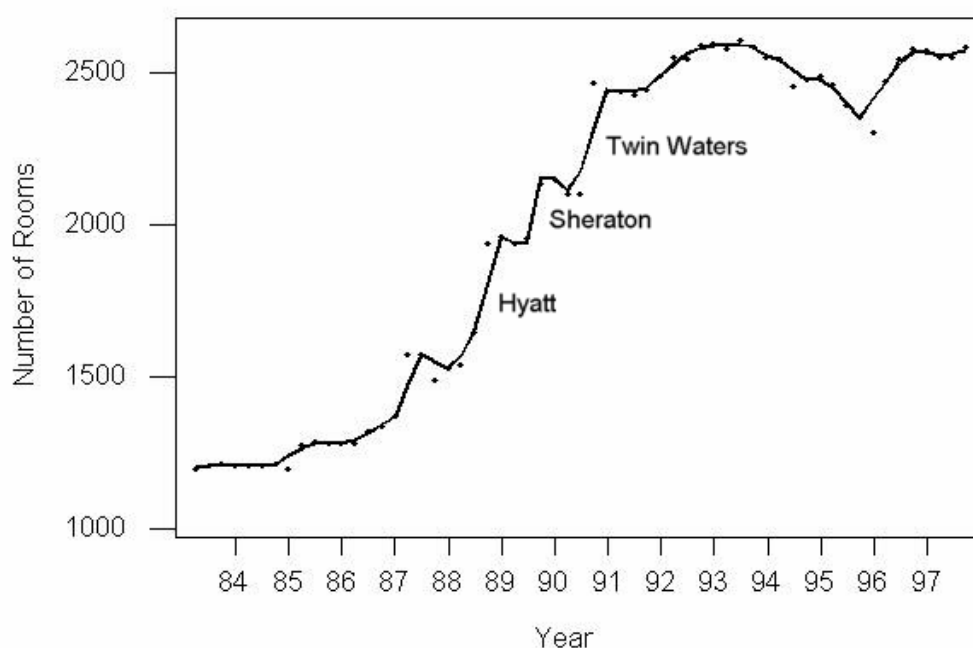


Figure 5.9 Trend in the Number of Rooms in Hotels, Motels, and Guest Houses in the Sunshine Coast Statistical District.
(Calculated from: ABS 8635.3 Tourist Accommodation using a Lowess Scatter-Plot Smoother {Lowess = 0.1})

In addition to highlighting the step-like growth in capacity during the four year development period, the lower level of analytic smoothing (Lowess=0.1), which identifies the trend of the regional data, also shows the changing trajectories that occurred during the overall 'equilibrium' period that followed the growth years.

The fifteen years of data on the number of rooms in the hotel, motel, and guest house sector has been separated into these different periods of change. For each trajectory, a trend analysis was conducted using a time-series linear model. This analysis establishes the direction and length of each change period. These trajectories were plotted against the

quarterly Sunshine Coast data (Figure 5.10). This process also identifies the change points, where one trajectory ends, and a new trajectory exhibiting a different type of growth, commences.

The first two periods, of early gradual growth followed by the development period, are again clearly evident. The post-development phase has been divided into the three periods of gradual increase, gradual decline, and subsequent return to gradual growth.

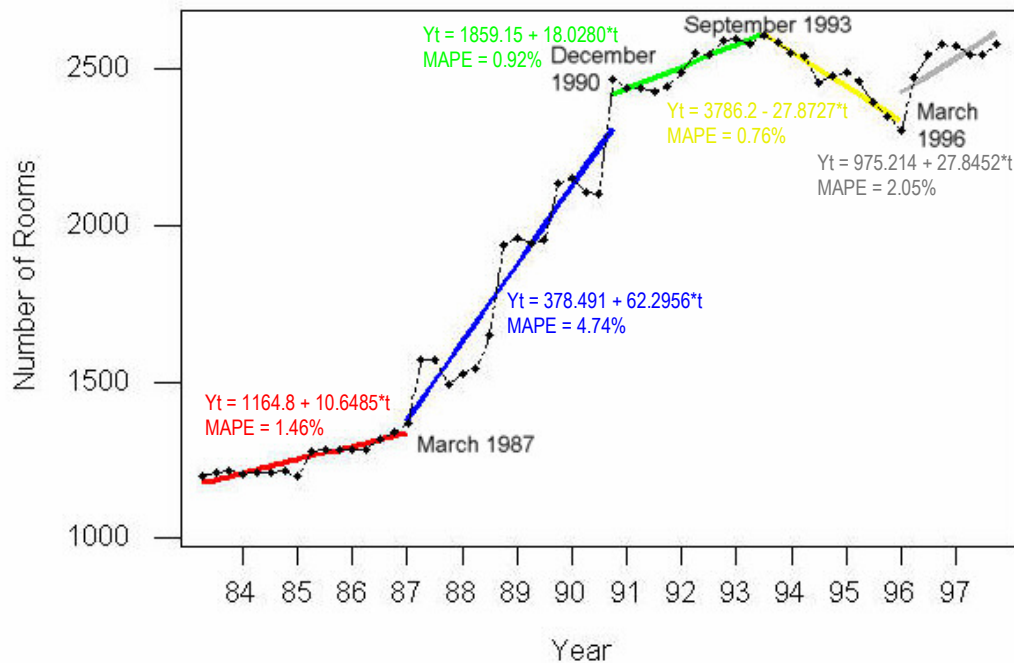


Figure 5.10 Trajectory Changes in the Number of Rooms in Hotels, Motels, and Guest Houses in the Sunshine Coast Statistical District.
 (Calculated from: ABS 8635.3 Tourist Accommodation using a Linear Trend Model)

Within the Sunshine Coast region, the change in the capacity offered by the hotel, motel, and guest house sector is determined by the increased number of rooms offered in each local area. The growth patterns for each of the three areas differ (Figure 5.11). This data, as with the number of establishments, is only available for the period from 1988 to 1997. This however still shows the effects of the tourism development phase, and the subsequent relative equilibrium.

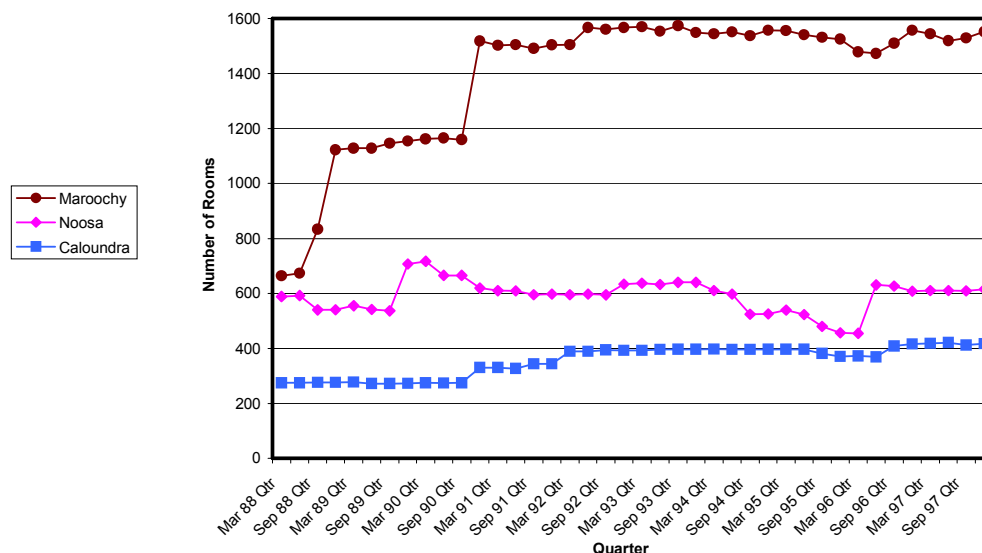


Figure 5.11 Number of Rooms in the Hotels, Motels, and Guest Houses in each of the Three Local Government Areas within the Sunshine Coast Statistical District. (Quarterly: 1988 – 1997) (Source: ABS 8635.3 Tourist Accommodation)

The pattern of the data on the capacity of the hotel, motel, and guest house sector in the Caloundra area is similar to that for the number of establishments (Figure 5.4). Both exhibit equilibrium for the late 1980s, followed by slight growth in the early 1990s, a second period of equilibrium, followed by a decline and subsequent recovery. These parallel patterns are due to the change in capacity with the introduction of new establishments. Despite this clear relationship between the variables, there is a difference in the patterns for these variables in the other local areas. This is due to the opening of large capacity resorts, which did not occur in the Caloundra area.

In Noosa Shire, the capacity of this accommodation sector fluctuated around 600 rooms. By the end of the decade, the capacity had not even risen by the increase recorded in the Caloundra Shire. There was however significant range in capacity over this time. The introduction of the Sheraton Resort in 1989 saw capacity step up to pass the 700 room mark, while in the mid 1990s the number of rooms dropped to approximately 450. The second step up in the number of rooms occurred in 1996, with the addition of two smaller establishments. The growth in capacity in the Noosa area appeared to occur in steps, but the decline in the number of rooms occurred more gradually.

The doubling of the number of rooms in the hotel, motel, and guest house sector on the Sunshine Coast, is therefore primarily due to the large jumps in capacity within the

Maroochy area. The data clearly shows these steps for the opening of the Hyatt Coolum (1989) and the Twin Waters Resort (1990). Each rise then appears to be followed by a period of general equilibrium.

The separation into the shires clarifies the origin of the step-like rises in capacity that occurred on the Sunshine Coast during the development period of the late 1980s as the three jumps in capacity between 1988 and 1990 are clearly shown in the data from the local areas.

The decrease in capacity within the region from late 1993 to the beginning of 1996, was discussed above (Figure 5.10). The separation of this data into the local areas shows that the decline was predominantly due to the reduction in capacity within the Noosa area. The beginning of the recovery in March 1996, was also the result of the jump in the number of rooms within Noosa. This shows how a change in one area can affect the pattern displayed by the total regional data.

The total number of rooms provided by the hotel, motel, and guest house sector within Queensland, as with the Sunshine Coast, more than doubled over the fifteen years (Figure 5.12). However there are different patterns of growth between the Regional and State accommodation capacity. The step pattern evident during the development period on the Sunshine Coast is not present at the State level.

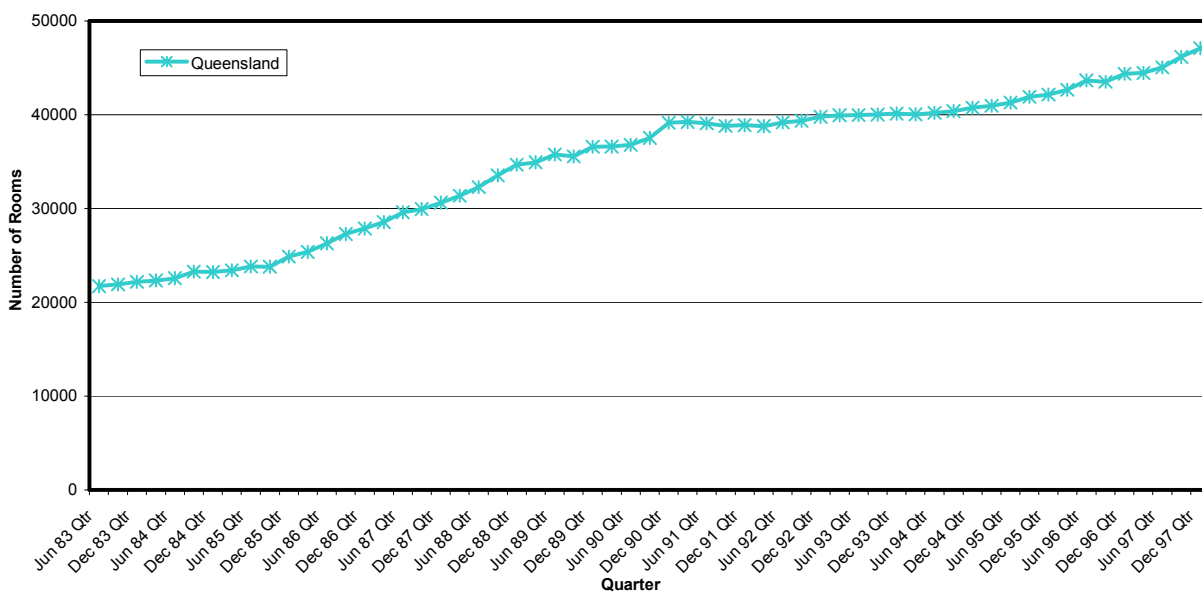


Figure 5.12 Number of Rooms in Hotels, Motels, and Guest Houses in Queensland. (Quarterly: 1983 – 1997) (Source: ABS 8635.3 Tourist Accommodation)

The pattern of growth shown by the data on the number of rooms for Queensland has been separated into four periods, each with a different growth trajectory (Figure 5.13). These trajectories can then be compared to the pattern of growth for the capacity of the hotels, motels, and guest houses on the Sunshine Coast (Figure 5.10).

An important difference in the growth in capacity between the regional and state levels was the timing of the main period of development. At the state level, the rise in the number of available rooms occurred primarily between the latter stages of 1985 and the end of 1990, while growth on the Sunshine Coast did not begin until 1987. The Queensland data therefore reflects the general tourism expansion period that had begun by 1986, as discussed in Chapter Four. There was a delay before the development boom was evident on the Sunshine Coast. The growth phases for both the Sunshine Coast and Queensland had ended by late 1990 due to the recession and the time involved in completing projects already underway.

Another difference in the patterns of growth at the regional and state levels was the drop in the capacity on the Sunshine Coast over a two and half year period, beginning early 1994. At the state level, the number of rooms was still rising, and even began growing at an increasing rate.

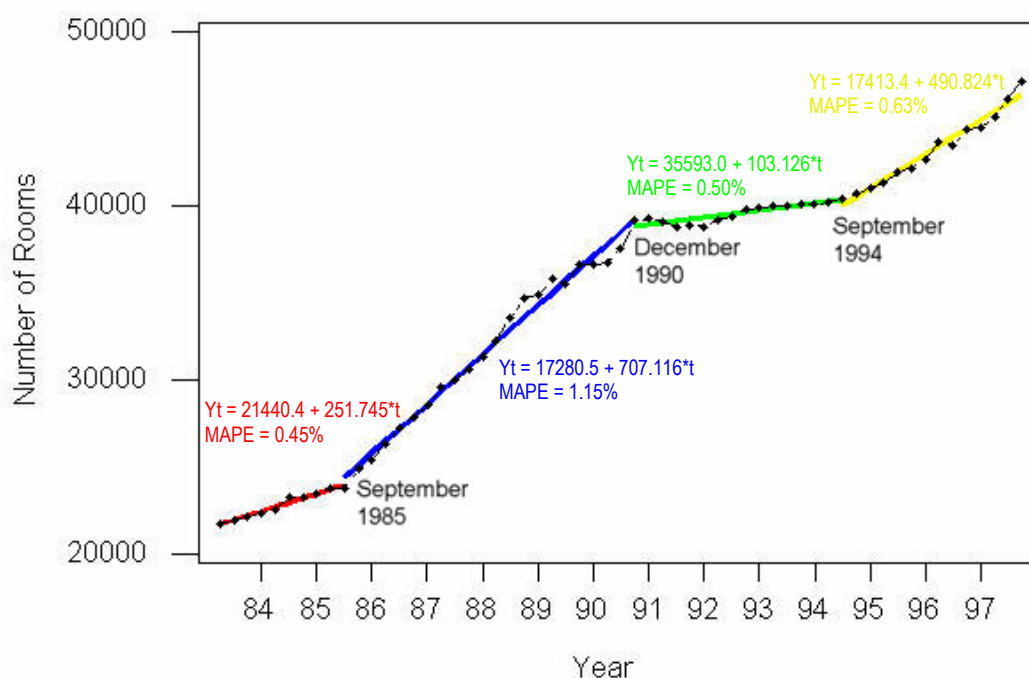


Figure 5.13 Trajectory Changes in the Number of Rooms in Hotels, Motels, and Guest Houses in Queensland.
(Calculated from: ABS 8635.3 Tourist Accommodation using a Linear Trend Model)

Although the Queensland pattern of growth is smoother than the step-like growth exhibited at the Local and Regional levels, the National pattern of growth in the capacity of rooms in the hotels, motels and guest house sector is even smoother (Figure 5.14). However, the Australian data still shows the tourism boom years from 1986 to the early 1990s.

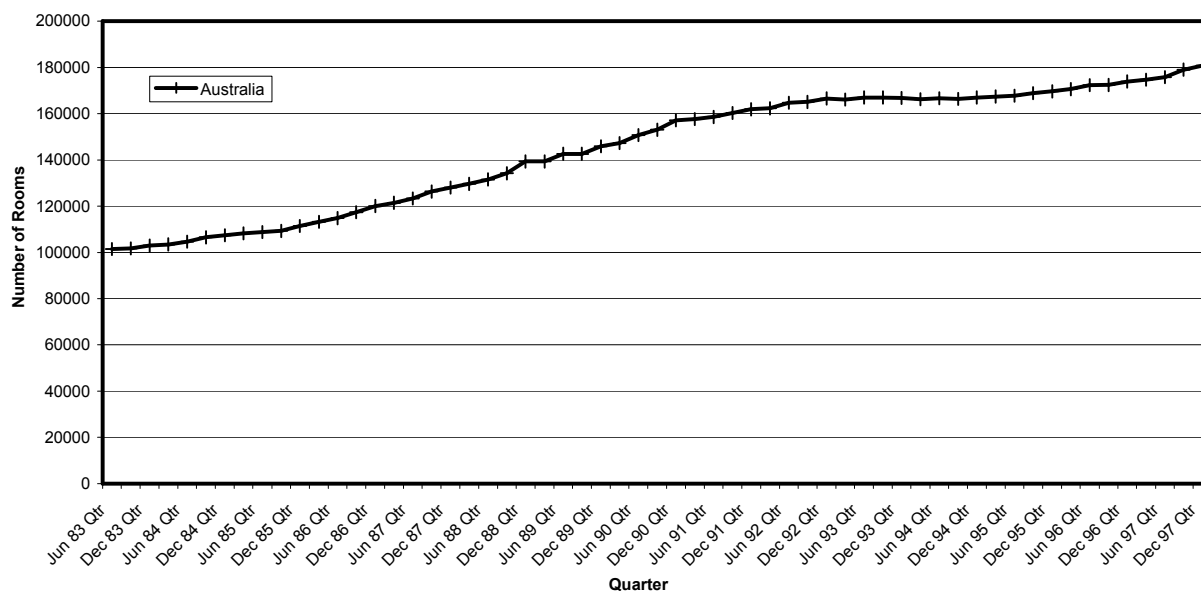


Figure 5.14 Number of Rooms in Hotels, Motels, and Guest Houses in Australia.
(Quarterly: 1983 – 1997)
(Source: ABS 8635.0 Tourist Accommodation)

The data on the total number of rooms in Australia has also been separated into the different periods of growth (Figure 5.15). This shows the growth in the mid 1980s, the subsequent accelerated growth, a period of relative equilibrium, and a second increase in capacity. When compared to the time periods discussed in Chapter Four, the transition into increased capacity in late 1985 correlates with the beginning of the development boom (1986-1988). However capacity also continued to rise after the end of the boom years. This accelerated growth continued through the Recession period (1989-1991), which incorporated the Pilot's Dispute, airline deregulation, and the Gulf War. The Recovery Period (1992-1994) saw a slow down in the increasing capacity in the hotel, motel, and guest house sector nation-wide. As mentioned in Chapter Four, concern was raised during this period about the limited amount of hotel accommodation in Australia, especially in some of the main tourist destinations. The rising occupancies and room rates assisted in plans for new establishments, which are evident in the rising capacity from mid 1995.

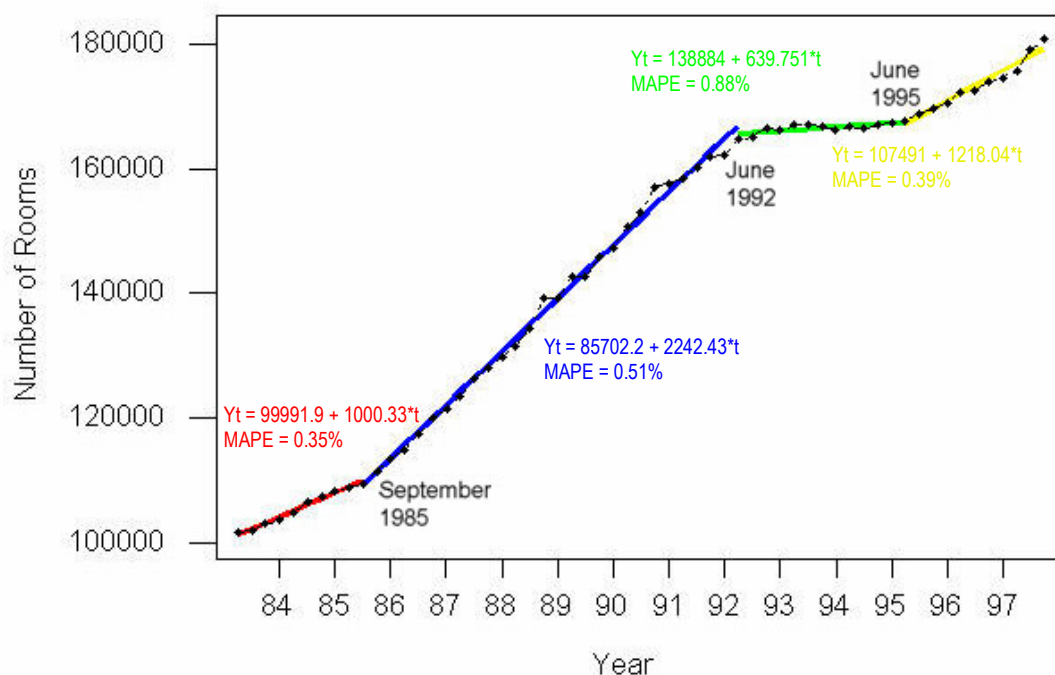


Figure 5.15 Trajectory Changes in the Number of Rooms in Hotels, Motels, and Guest Houses in Australia.
(Calculated from: ABS 8635.3 Tourist Accommodation using a Linear Trend Model)

Comparing the patterns for Australia and Queensland shows four similar growth trajectories, although the time frames differ (Figure 5.13 and Figure 5.15). Both have a change point in September 1985, for the start of the boom years. This shows that development of the Sunshine Coast lagged behind both the state and national trends, as the development trajectory for the Sunshine Coast did not begin until March the following year. At the end of 1990 the increasing capacity at the national level continued its upward growth, while capacity reached a plateau for Queensland. This shows that Australia and Queensland began the growth period together, while Queensland and the Sunshine Coast began their phases of relative equilibrium together. It is interesting to note that this change point for Queensland and the Sunshine Coast occurred at the same time as the change from the Liberal/National State Government to the first Labor Government for over two decades.

In summary, at the regional level the pattern of growth in hotel, motel, and guest house rooms incorporated five different growth trajectories. This was smoothed out at the state and national levels, as each experienced only three types of trajectories during the fifteen years. The smoothing of the growth patterns at the higher system levels illustrates the Research Issue of data smoothing at aggregate levels.

5.3.2 Population Growth

There was a threefold increase in the population of the Sunshine Coast region during the last twenty years of the 20th Century. As mentioned in Chapter Four this rapid increase is a significant defining aspect of development in the region. There was continual growth in the regional population from 1976 into the 21st Century (Figure 5.16), with the data displaying a trajectory that gradually increases over the period. The population within the destination is therefore experiencing a period of ‘positive evolution’, as described by the Multi-Trajectory Model of Tourism Destination Change.

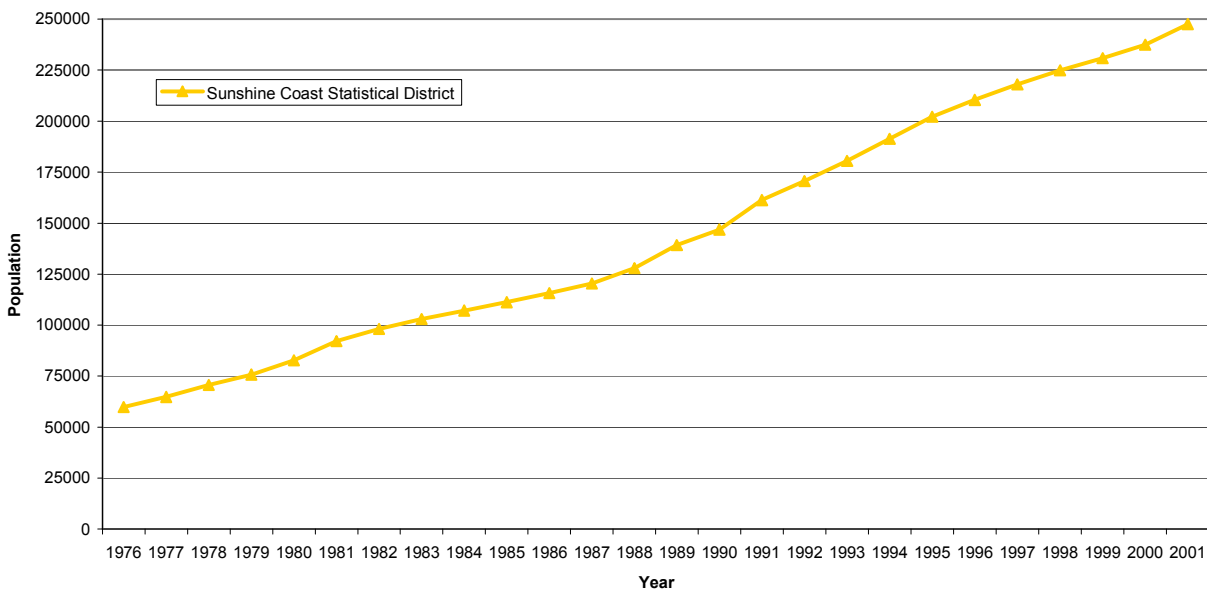


Figure 5.16 Population of the Sunshine Coast Region. (1976 – 2000)
 (Source: ABS 3212.3 Estimated Regional Population)

The population growth of the Sunshine Coast region is the culmination of the increase in the population of the three Local Government Areas: Caloundra, Maroochy and Noosa (Figure 5.17). The overall trend for each has also been ‘positive evolution’. However, the data shows that the local areas have experienced different levels of growth over the twenty-five years.

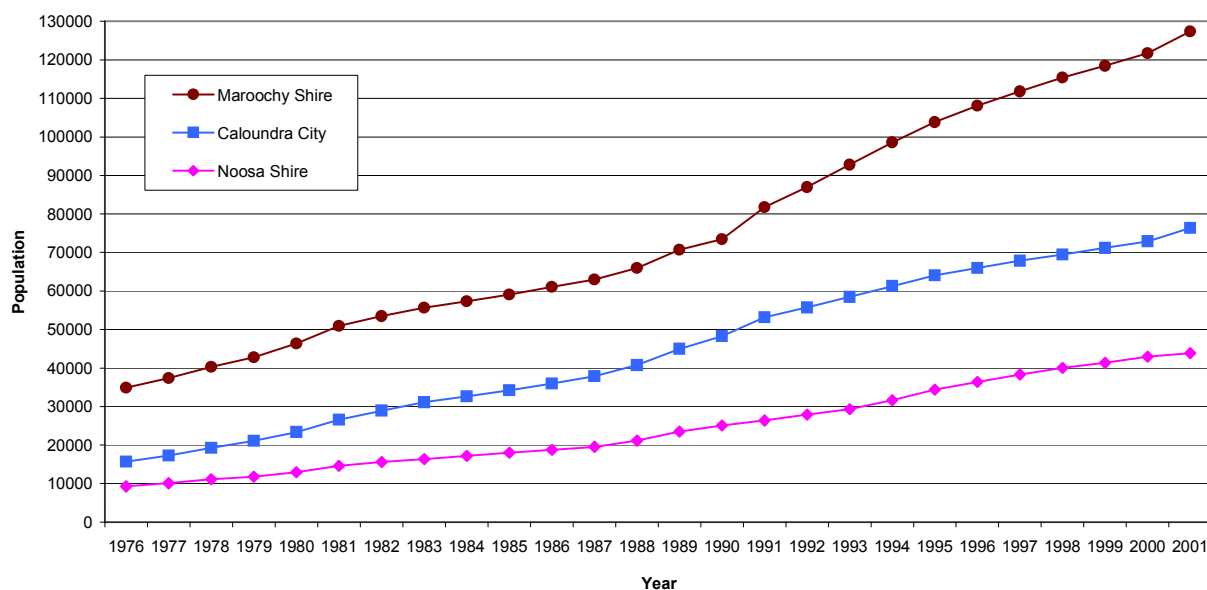


Figure 5.17 Population of Caloundra City, Maroochy Shire, and Noosa Shire. (1976 – 2000)
 (Source: ABS 3212.3 Estimated Regional Population)

The increasing growth in the population of the Maroochy and Noosa Shires since the late 1980s is offset by the constant growth within Caloundra City, resulting in a less obvious change in the regional population data pattern. Since 1990, the Maroochy Shire has seen the greatest absolute increase in population, growing from just over 70 thousand to almost 130 thousand people by 2001. However, it has been the Shire of Noosa that has grown by a larger percentage, 70 percent over the decade.

To clearly illustrate this difference in the growth patterns, as well as to display the effects of smoothing when higher levels of the tourism system are analysed, the patterns displayed by the yearly growth rates are analysed.

The population pattern for the Sunshine Coast appeared to illustrate relatively steady growth (Figure 5.16). However, the pattern actually incorporated yearly population changes of between three and eleven percent (Figure 5.18). This demonstrates that despite the continual ‘positive evolution’ increase in population, the growth rate has changed over time.

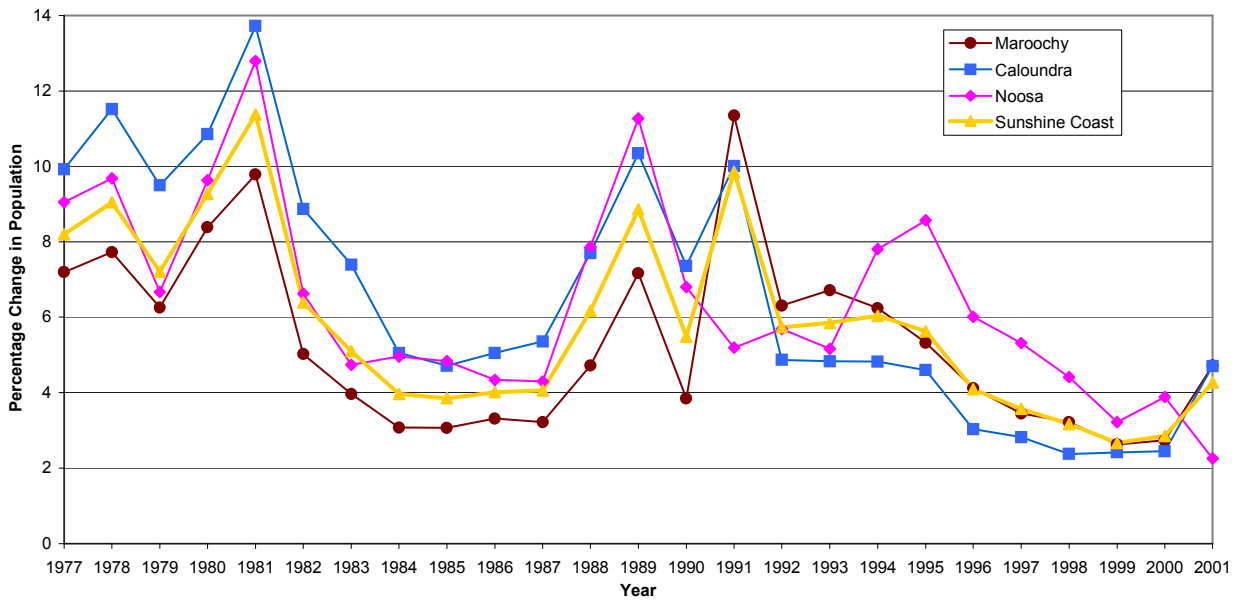


Figure 5.18 Percentage Change from the Previous Year in the Population of the Sunshine Coast Region, Caloundra City, Maroochy Shire, and Noosa Shire. (1977-2000)
 (Calculated From: ABS 3212.3 Estimated Regional Population)

There were even greater growth rate fluctuations occurring in the three local areas (Figure 5.18). The three areas seem to generally follow the same regional pattern until the early 1990s when the Noosa Shire population growth ceases to change in line with the region. While the yearly growth rate increased in 1991 for Maroochy and Caloundra, Noosa grew at a lower rate. The Shire instead experienced a greater rise in population growth for 1994 and 1995 than the remainder of the region. In the last year, the Noosa Shire population growth is again at odds with the regional increase as the growth rate lowers. The recent separation of Noosa Shire from the regional pattern of population growth coincides with the population cap introduced into the town plan in late 1997, as discussed in Chapter Four.

Comparing the growth rate of the three local areas to the aggregated regional growth rate demonstrates how the macro picture is the result of changes in the areas, and yet is not representative of them. The three peaks in the regional growth rate (Figure 5.18) occurred in 1981, 1989, and 1991. When compared to the local area growth rate changes, it can be seen that in 1981, Caloundra experienced the highest growth rate, while in 1989, Noosa’s percentage increase was highest, and in 1991, the Maroochy Shire topped the growth rate. This can also be seen in the total population of the local areas (Figure 5.17), where the population of Noosa grew significantly in the late 1980s where as the greater population growth in the Maroochy Shire occurred in the early 1990s. The regional population growth

thus provides a useful indicator of the overall development of the region. However the local level data illustrates where the centre(s) of the growth were and where one area may have experienced a different pattern of growth to the remainder of the region.

The yearly population growth rate of the Sunshine Coast is noticeably higher and more varied than the State and National population increases (Figure 5.19). Unlike the dramatic growth rate of the Sunshine Coast region, the Queensland population had only been increasing by between approximately 1.5 and 3.5 percent per year. This is still higher than the total Australian population, which had only been growing between around 1 and 2 percent per year. This highlights the effect of the northward migration trend, as Queensland, and in particular the Sunshine Coast, record greater growth than the National trend, as determined by the net effects of the birth and death rates, and migration.

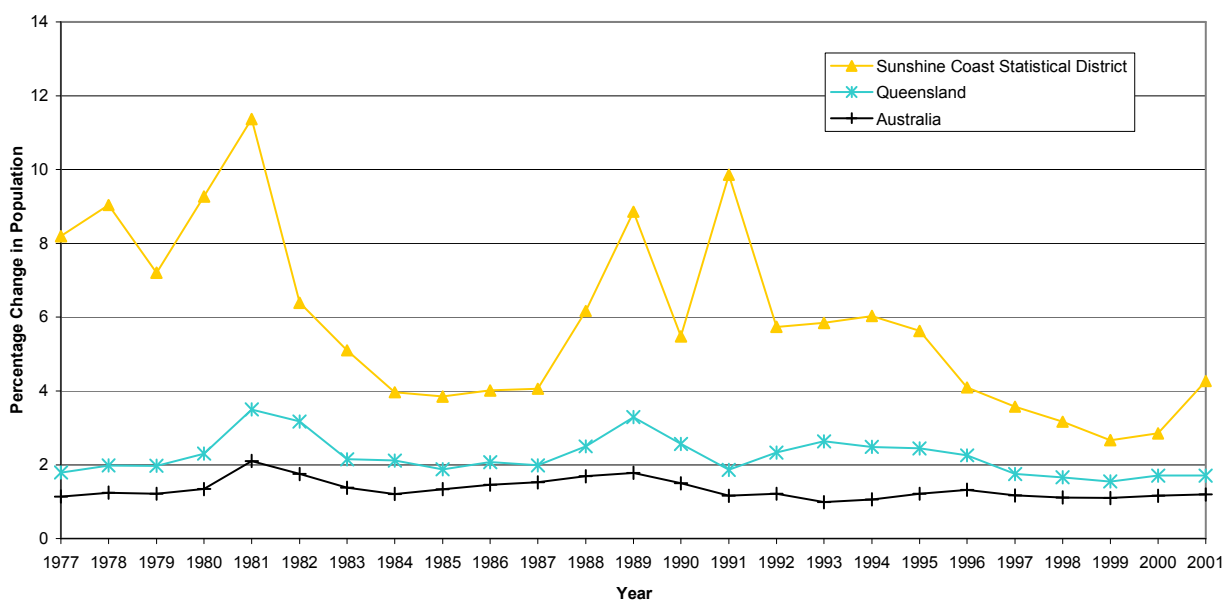


Figure 5.19 Percentage Change from the Previous Year in the Population of the Sunshine Coast Region, Queensland, and Australia. (1977-2000)
(Calculated From: ABS 3212.3 & 3212.0 Estimated Regional Population)

The patterns generated by the population growth at the local, regional, state, and national levels illustrates the effects of smoothing as the analysis progresses up the levels of the case system. Despite the overall smoothing, some of the peaks in the population growth are evident at the regional, state, and national levels, such as the rise at the beginning and end of the 1980s. All three levels show a jump in the population for 1981 and again in 1989, although the extent of the growth differs for each. However, the Sunshine Coast experienced another peak in population growth in 1991. This was in contrast to both the State and National trends.

5.3.3 Addressing Research Issue One - Data Aggregation

The analysis of the growth trends of the different variables, hotel, motel, and guest house establishments and rooms, and population, at the various levels of the case system has demonstrated that an aggregate measure of change does provide an overview of the total area described. However it does not illustrate the underlying change and complexity that occurs within a tourist destination, or the variation that may exist within sub-areas. In particular the centres of growth in the lower areas cannot be understood from higher level data. This supports the first Research Issue of the Multi-Trajectory Model of Tourism Destination Change.

5.4 Research Issue Two - Visitor Numbers

The second Research Issue states that: **tourism change cannot be explained by total yearly visitor numbers alone**. Total visitor numbers is an aggregation of all types of visitors. As an overall measure of tourism change, this measurement fails to illustrate the underlying change, complexity, and variation that may exist within sub-classifications, and the impact of change in other variables.

This second research issue has three sub-issues (Figure 5.20). The first Sub-Issue considers that the total number of visitors is not representative of all the sub-categories and therefore does not show the underlying variation within these sub-categories. This Sub-Issue further supports the first Research Issue, as total visitor numbers is an aggregation of the sub-categories.

The second Sub-Issue considers the use of yearly visitor numbers. The yearly measurement obscures the seasonal variation of visitation that has significant impact on tourism destinations, including the economic viability of tourism and related businesses.

The third Sub-Issue proposes that other variables need to be considered in addition to visitation numbers to understand the changing tourism trends in a destination. The visitation pattern may not be the only change pattern of a destination, as other variables may display different patterns.

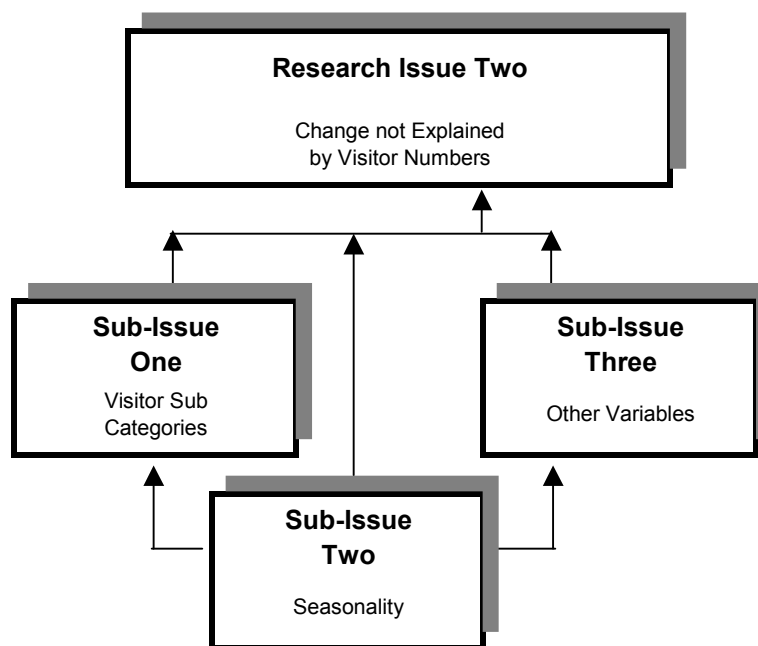


Figure 5.20 Sub-Issues of Research Issue Two.
(reproduced from Figure 5.1)

5.4.1 Sub-Issue One - Visitor Sub-Categories

The first Sub-Issue states that: **the pattern of total visitor numbers does not represent the underlying variation of sub-categories.** Total visitor numbers or visitor nights are an aggregation of all types of visitors. As an overall measure of tourism change, this measurement fails to illustrate the underlying variation that may exist within sub-classifications. This overall measurement can be broken down in a variety of ways, such as the origin of the visitors, type of accommodation utilised, reason for travel, or product markets.

This first Sub-Issue will therefore be addressed through a discussion of the various patterns of change exhibited by sub-categories of the total visitation received at different levels of the tourism system. As determined in Chapter Four, four visitation sub-category variables were selected: visitors to the Sunshine Coast by origin, by accommodation used, and by stage of life; and visitors to Australia by country of origin. Wherever possible, multiple sources of data are utilised.

5.4.1.1 Visitors to the Sunshine Coast by Origin

Regional data on total yearly visitor nights are sourced from the Queensland Office of Economic and Statistical Research (OESR). The Sunshine Coast data shows that the absolute number of visitor nights in the region doubled between 1985 and 1999 (Figure 5.21). This growth was sporadic with years of increasing numbers of visitor nights followed by decline for one or two years. The doubling of visitor nights during this fifteen-year period illustrates an era of fluctuating growth, with the overall trend of a gradually increasing trajectory.

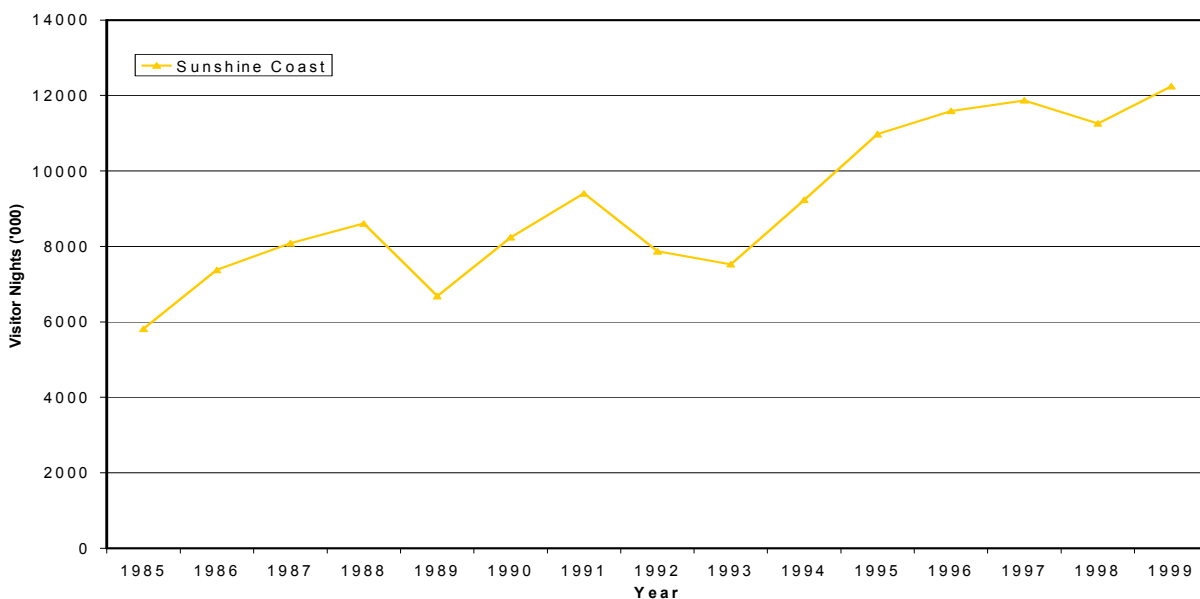


Figure 5.21 Number of Visitor Nights on the Sunshine Coast.
(1985 – 1999)
(Source: OESR – Visitor Expenditure in Regional Queensland)

The number of visitor nights in the region during 1988, with the impact of Expo 88, appears to continue the growth trend from the previous few years. The decline for 1989 was not unexpected, as discussed in Chapter Four. From 1993, growth in visitor nights has been continual with only 1998 experiencing a decline from the previous year. This reduction for 1998 is in parallel with the decline in international visitors to Australia due to the ongoing impacts of the Asian Crisis that occurred in late 1997.

However, within this overall ‘growth’ there are components that exhibit very different patterns of change. The National Bureau of Tourism Research (BTR) data separates the yearly visitor nights in the Sunshine Coast into the origin of the visitors (Figure 5.22). This shows the number of nights spent in the destination by Queenslanders, those from interstate,

and those from overseas. The changes in visitor nights seen in the total regional data (Figure 5.21) can be understood in greater detail with the nights separated into the origin of the visitors.

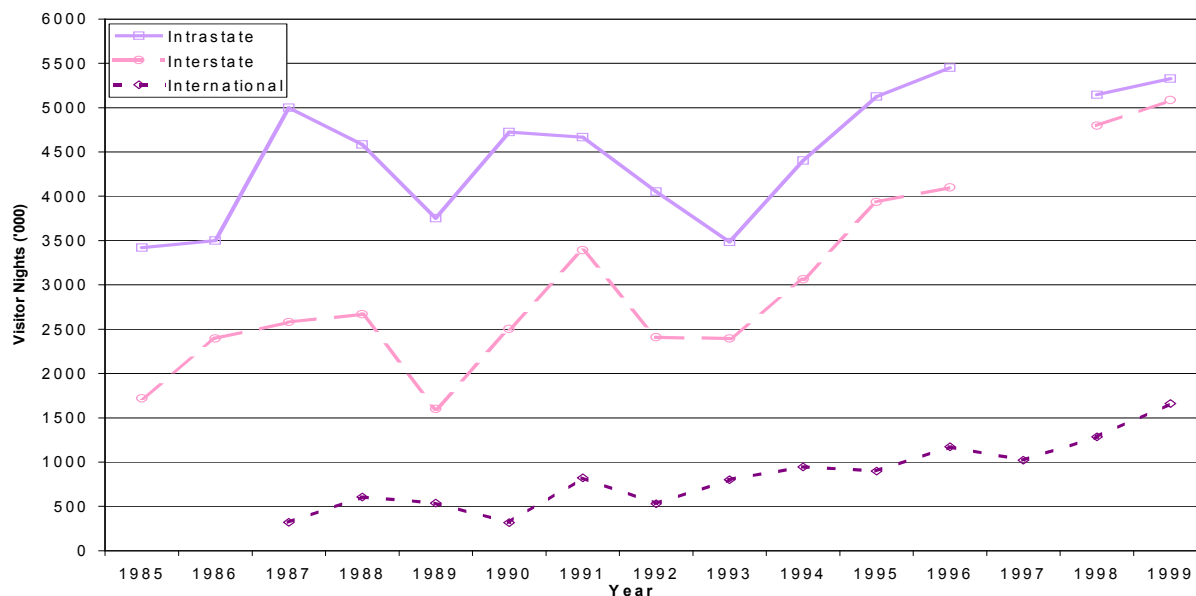


Figure 5.22 Number of Visitor Nights on the Sunshine Coast by Origin. (1985 – 1999)
(Source: BTR – Domestic Tourism Monitor and International Visitor Survey)

The growth in total visitor nights from 1985 to 1986 was predominantly an increase in interstate visitation to the Sunshine Coast, with the rise for the following year being primarily an increase in Queenslanders. The number of intrastate visitor nights spent in the region did not reach this 1987 level again until 1995. It is noteworthy that the number of Queensland visitors to the Sunshine Coast for 1988 was actually a decrease from the previous year. Therefore the boost received by tourism providers from Expo 88 was not due to an increase in Queensland visitor nights.

Against the general visitation trend, the number of international visitors declined in 1990. This may have been the result of the impact of the Pilots Dispute on the planning of international travellers who utilise air transport extensively.

The data illustrates that the decrease in visitor nights in 1992 occurred for all visitor origins. From 1993, visitor nights from all sectors continued to grow with the small number of international visitors continuing a fluctuating growth trajectory, even with the Asian Crisis.

In parallel to visitor nights, data on the number of visitors for each financial year is provided by Tourism Queensland (TQ, previously QTTC - Queensland Tourist and Travel Corporation). This visitation data is broken down into the origin of these visitors (Figure 5.23). Certain characteristics of this series are similar to the data on visitor nights discussed above, including the increase for 1988 for interstate and international visitors and the decline for intrastate visitation. However there are also numerous differences between the two data series. This is partially due to the dependence of visitor nights on the length of stay, which is not relevant for the number of visitors (discussed further in Section 5.4.3.1). Additionally, the TQ data on visitor numbers incorporates only those who stayed in commercial accommodation.

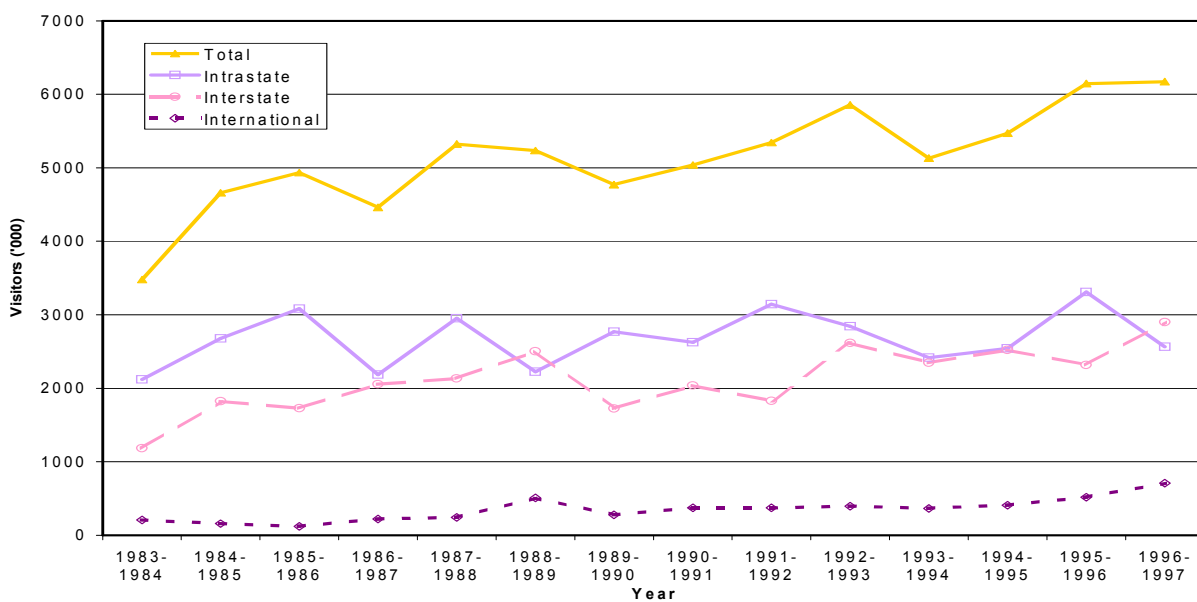


Figure 5.23 Number of Visitors to the Sunshine Coast by Origin. (1983/4 – 1996/7)
 (Source: QTTC/TQ – Major Survey Research Programme and Queensland Visitor Survey)

The fourteen-year data series on visitors to the Sunshine Coast shows the general increase in the number of visitors from each of the three origin categories. The number of visitors from Queensland fluctuated between 2.12 million and 3.3 million over the fourteen year period. By 1996/97 the intrastate visitation was 21 percent greater than the 1983/84 level. Interstate visitor numbers rose in the years leading up to 1988/89, before dropping in 1989/90, and then increasing again over the second half of this period. The overall rise in interstate visitation over the fourteen years was almost a 150 percent increase on the 1983/84 level. While representing only a small percentage of total visitors to the Sunshine Coast the number of international visitors tripled over the fourteen years, with a peak for Expo 88.

Interestingly the growth years of one category often appear to be the lower visitation years for another. It is therefore clear that the total number of visitors conceals these underlying irregularities.

5.4.1.2 Visitors to the Sunshine Coast by Accommodation Used

The number of visitor nights can be further separated into the type of accommodation utilised for each of the three origin categories: hotel/motel, caravan park/camping, rented house/flat, staying with friends or relatives, or staying in their own property. This provides additional details regarding the complexity that occurs beneath the overall measure of visitation.

This is an important component of visitation as it illustrates the trend in the type of accommodation used. This can be important in establishing whether there has been a change in the need for certain forms of accommodation.

The majority of nights spent by Queensland visitors on the Sunshine Coast occurred at the visitor's friends or relatives place (Figure 5.24). Use of this type of accommodation grew significantly in 1991, and since then the pattern of change generally matches the overall pattern of the number of intrastate visitor nights (Figure 5.22), exhibiting a decline over the next two years, followed by increasing nights.

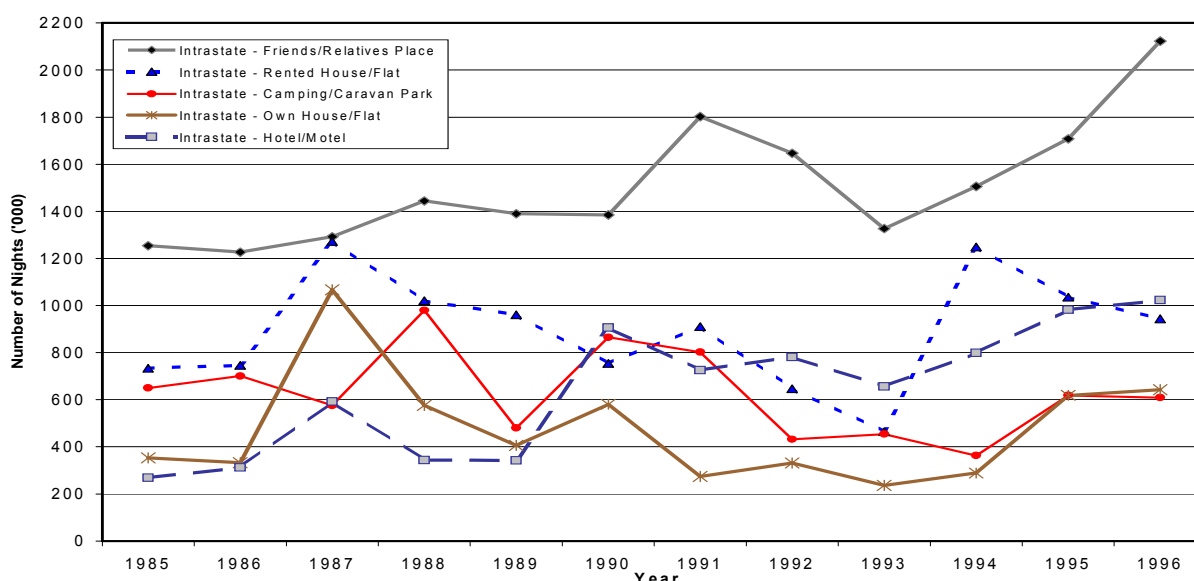


Figure 5.24 Type of Accommodation Used by Intrastate Visitors to the Sunshine Coast. (1985 – 1996)
(Source: BTR – Domestic Tourism Monitor)

The second most utilised form of accommodation for Queensland visitors was the rented house or flat. In 1987, the number of visitor nights for this category almost matched the number spent with friends and relatives. In the same year the number of nights visitors spent in their own property also increased dramatically. As a result of the changes to these two types of accommodation, and a smaller rise in the number of nights spent in hotels and motels, the peak in total intrastate visitors nights can be explained (Figure 5.22). The number of nights spent in these three types of accommodation fell for 1988, while the number of nights spent camping or in caravan parks jumped.

The drop in total intrastate visitors for 1989 saw a reduction in the number of nights spent in all five accommodation categories. The rise in 1990 in the nights spent in the three less used forms of accommodation: the hotel sector, caravans and camping, and use of their own home, resulted in the peak in the total visitor nights for that year.

As mentioned above, the pattern displayed by the total number of intrastate visitor nights from then until 1996 is generally reflected by the pattern of the number using their friends or relatives place. However, it is worth noting that there was also a dramatic increase in the nights spent in rented accommodation for 1994.

Additionally the number of nights spent in the hotel sector has increased significantly over the eleven year period when compared to the other four forms of accommodation. In 1985 the least number of intrastate visitor nights were provided by the hotel sector. By 1996 the nights in this sector were secondly only to the visiting friends and relatives category. This rise initially occurred in 1990, by which time the Hyatt Regency Coolum had been open a year and the Sheraton Noosa was just opening its doors.

Despite the overall decrease in Sunshine Coast intrastate visitor nights during 1988, there was an increase in the number staying in caravan parks or camping, and those staying with friends and relatives. The decrease in the nights occurred in the rented accommodation, the hotel sector, and nights spent by visitors in their own property.

Similar to the intrastate visitor nights, the bulk of interstate nights are spent at a friends or relatives place (Figure 5.25). This form of accommodation therefore explains the majority of the total interstate visitor nights (Figure 5.22). The patterns of change for these two

variables generally match, with the exception of 1991. The growth in interstate visitor nights for this year was due to the growth in the number of nights spent in the hotel sector, and in caravan parks or camping.

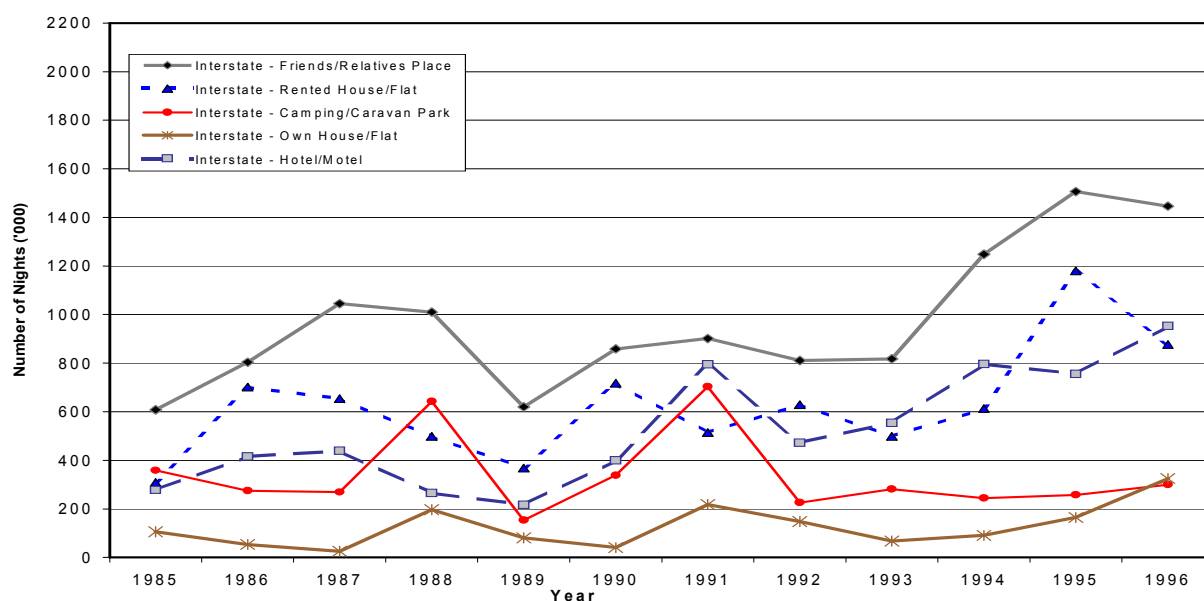


Figure 5.25 Type of Accommodation Used by Interstate Visitors to the Sunshine Coast. (1985 – 1996)
(Source: BTR – Domestic Tourism Monitor)

In both 1985 and 1996 thirty-five percent of the interstate visitor nights were spent in a friends or relatives place. The rising categories were the hotel sector and rented accommodation, which increased from 16 percent and 18 percent of the total interstate nights, to 23 percent and 21 percent respectively, over the twelve years.

The increase in interstate visitor nights in 1988 saw a rise in the number staying in caravan parks or camping, and those using their own properties. There was a decline in the number staying in hotels or rented properties, and a small decrease in those staying with friends and relatives.

As with both intrastate and interstate visitor nights, the majority of international visitor nights on the Sunshine Coast are spent at a friend or relatives' place (Figure 5.26). The pattern of change for this form of accommodation generally matches the pattern of the number of international visitor nights (Figure 5.22), with the exception of 1994. In this year the nights spent at a friends or relatives declined and the increase in total overseas visitors was due to the jump in the nights spent in rented accommodation. The significant rise in the

use of this form of rented accommodation over the eight years saw the percent rise from only 2 percent of the international visitor nights in 1989 to 30 percent by 1997. In contrast, the number of international nights spent in the hotel sector was similar in 1989 and 1996, despite the total increase in overseas visitor nights.

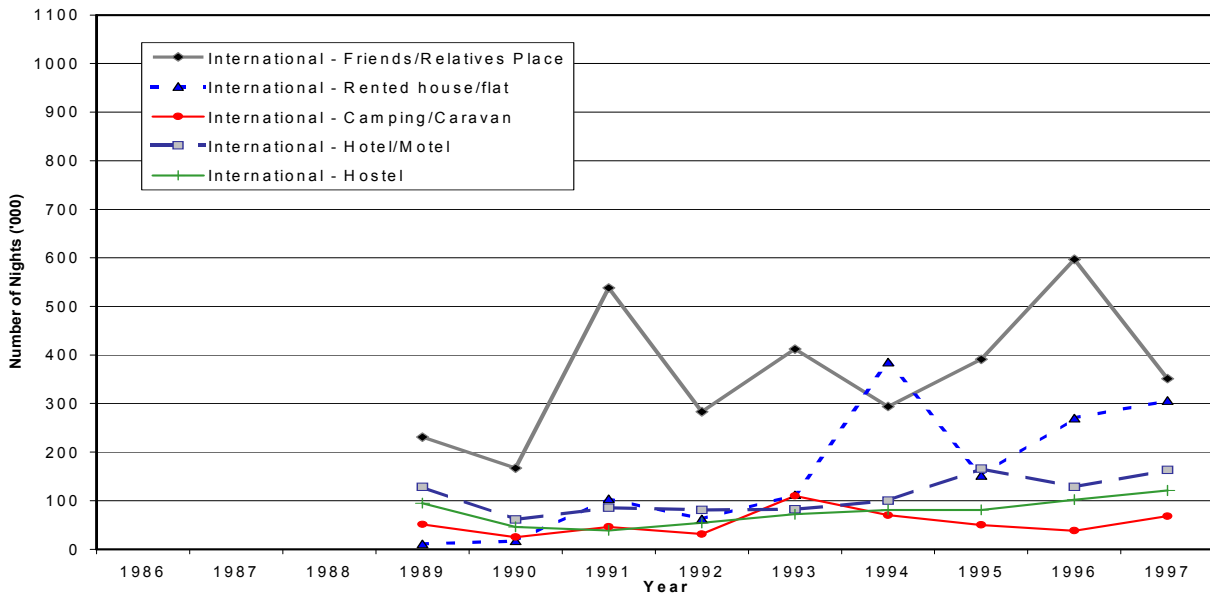


Figure 5.26 Type of Accommodation Used by International Visitors to the Sunshine Coast. (1989 – 1997)
 (Source: BTR – International Visitor Survey)

5.4.1.3 Visitors to the Sunshine Coast by Stage of Life

The number of visitor nights can also be divided into the stage of life of the visitors. The life stages of domestic visitors to the Sunshine Coast appears quite complex (Figure 5.27). This highlights the continual changes that occurred in the type of visitors who travelled to the region, and made up the total number of visitors and visitors nights.

Data on the domestic visitor nights by stage of life shows the type of groups that stay in this region. The main group who visit this destination are ‘Families’, and their numbers have increased, almost doubling over the thirteen year survey period. There was however, a drop in family visitation in the early 1990s, after which the number of family nights grew again, to reach the 1990 level. There is also a growing number of ‘Adult Solos’, with the amount of nights trebling in the thirteen years.

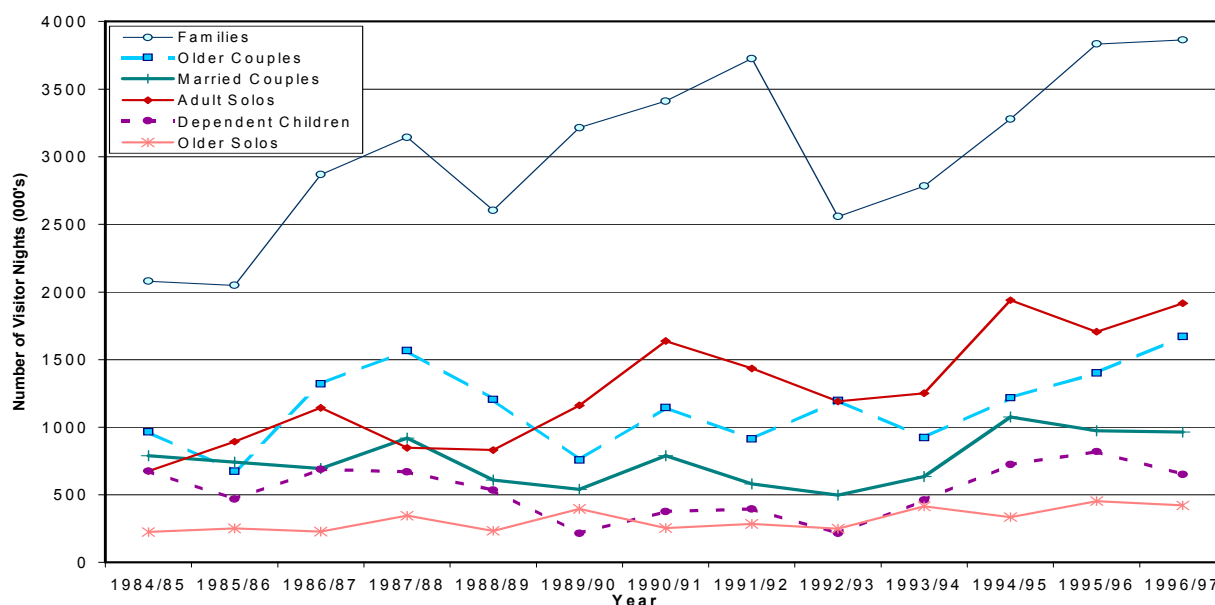


Figure 5.27 Sunshine Coast Domestic Visitor Nights by Stage of Life Categories. (1984/85 – 1996/97)
(Source: BTR – Domestic Tourism Monitor)

The changing patterns in the data on the stage of life of domestic visitors to the Sunshine Coast shows the changes that underlie a measurement of domestic visitor nights spent in the destination. These fluctuations result in the overall pattern but each sub-category contributes a different and dynamic component.

5.4.1.4 International Visitors to Australia by Origin

The change underlying total visitor numbers is also evident at higher system levels. For example, the total number of international visitors to Australia can be divided into visitation from a number of regions, each of which comprises numerous countries. As shown in Chapter Four, levels of visitation from various countries is determined by a multitude of factors including the state of their economy, encouragement or discouragement to travel overseas by their Government, the level of promotion conducted by Australia, airfare and package prices, the exchange rate for the Australian dollar, and other competing destinations. The different combinations of these, and other factors results in a complex array of visitation patterns for each region and country.

The total number of short-term visitor arrivals to Australia increased dramatically over the twenty years from 1980 to 1999 (Figure 5.28). From 1980 to 1983, visitor numbers were in an 'equilibrium' phase, with numbers fluctuating between 900 and 950 thousand visitors.

From 1984, there was generally continual growth, with the exception of major events. The tourism boom years, which incorporated the build up to and holding of Expo 88, is highlighted by growth trajectory for the 1986 to 1988 period. The following year incorporated the post-Expo lull in visitors, combined with the Pilot's Dispute, culminating in a drop in international visitors. After this fall for 1989, overseas visitation began a slow rise, which continued until 1997, the year of the Asian Crisis. The subsequent drop in visitors affected the latter stages of 1997, resulting in lower growth for that year, as well as for 1998.

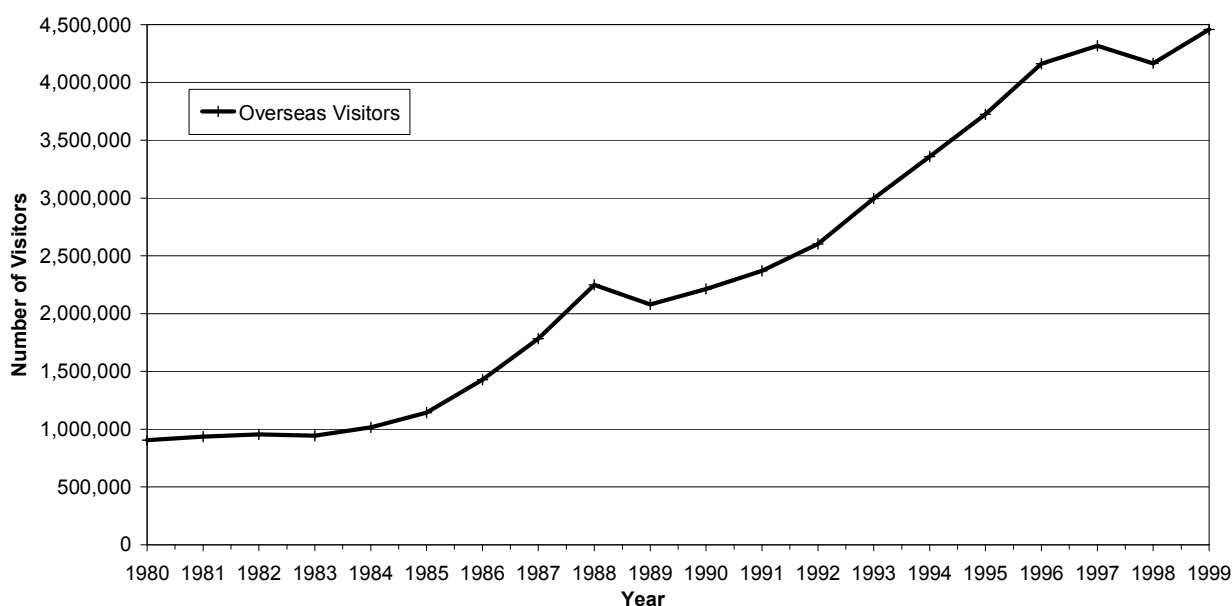


Figure 5.28 Total Number of Short-Term Overseas Arrivals to Australia. (1980 – 2000)
(Source: ABS 3401.0 Overseas Arrivals and Departures)

This overall growth in international visitation, while highlighting the significant events that affected Australian tourism, does not show the fluctuations in the numbers from each region. The total visitation per year is a combination of the number of visitors from each region. An overall increase may in fact be a combination of a dramatic rise from one region, a small rise from a second, no rise for a third, and a drop in the numbers from a fourth.

The total overseas visitation to Australia can be separated into the number of visitors from the main regions of the world (Figure 5.29). This illustrates the different growth patterns for each region, and shows the change from the main markets of Oceania and Europe in 1980 to the Asian markets in the 1990s.

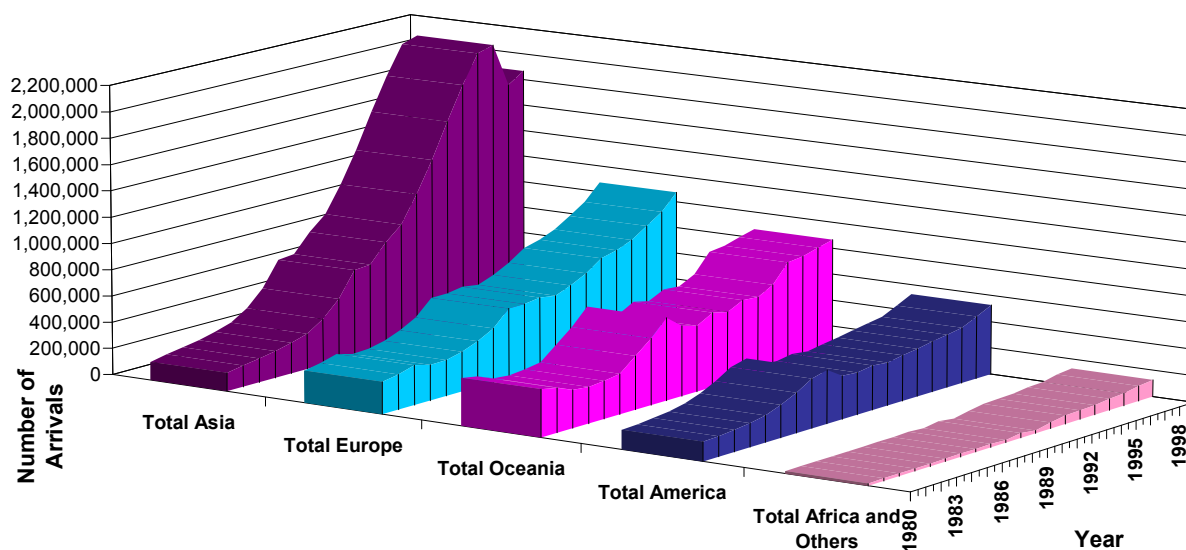


Figure 5.29 Number of Short-Term Overseas Arrivals to Australia by Generating Region. (1980 – 1999)
(Source: ABS 3401.0 Overseas Arrivals and Departures)

Total international visitation appeared relatively constant for the early years of the 1980s. This was in fact the result of a decline in visitors from the Oceania region, offset by slow growth from the other regions. The growth period from 1986, occurred for the four main generating regions, although the growth in American visitors was slowing by 1988. The overall drop in visitor numbers for 1989 did not represent the visitation from all the regions, with increased numbers arriving from Asia and Europe despite the Pilot's Dispute. The increase in international arrivals during the 1990s was, in the main, due to the rapid growth of the Asian economies. In addition the drop in numbers for 1998 was specifically related to the effects of the Asian Crisis, with visitation continuing to increase from all the other regions.

The pattern presented by data on the total number of international visitors to Australia shows the overall growth and the significant events (Figure 5.28). This data has been separated into the main regions of the world, illustrating the different patterns of these sub-variables (Figure 5.29). The visitation levels of these regions can be further broken down into their component countries. The Asian region incorporates a number of significant tourist generators. The number of visitors from these countries has increased considerably. However, the extent and the periods of growth differ.

As highlighted in Chapter Four, Japan was the first Asian country to generate large numbers of visitors to Australia. This growth, during the 1980s, surpassed all other countries, with Japan becoming the largest national source of international visitors to Australia by 1988.

Throughout the 1980s, the total number of visitors to Australia from Asian countries increased in accordance with the rising number of Japanese travellers (Figure 5.30). This pattern changed in the early 1990s, with the dramatically increasing number of total Asian visitors growing well above the growth of the Japanese market. In 1993, more visitors arrived from ‘Other Asia’ than from Japan, although Japan remained the largest single source of visitors.

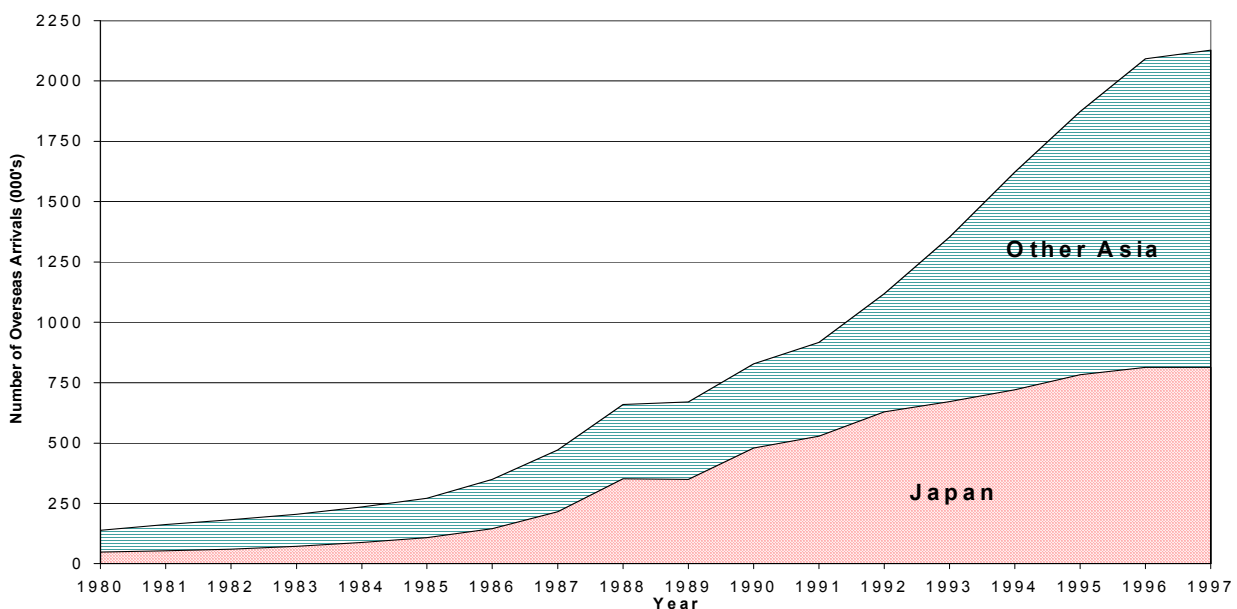


Figure 5.30 Number of Short-Term Overseas Arrivals to Australia from Japan and the Rest of Asia. (1980 – 1997)
(Source: ABS 3401.0 Overseas Arrivals and Departures)

As discussed in Chapter Four, the high growth in visitation from the ‘Rest of Asia’ during the 1990s was not evenly spread across the generating countries (Figure 5.31). All Asian markets then slowed for 1997.

The total number of short-term international visitors to Australia can therefore be seen to incorporate the rise and fall of visitation from the various countries that make up the regions of the world. Changes in the direction of growth may only be due to certain countries or a region. It is therefore important to view the visitation trends for the smaller categories in order to understand the overall pattern.

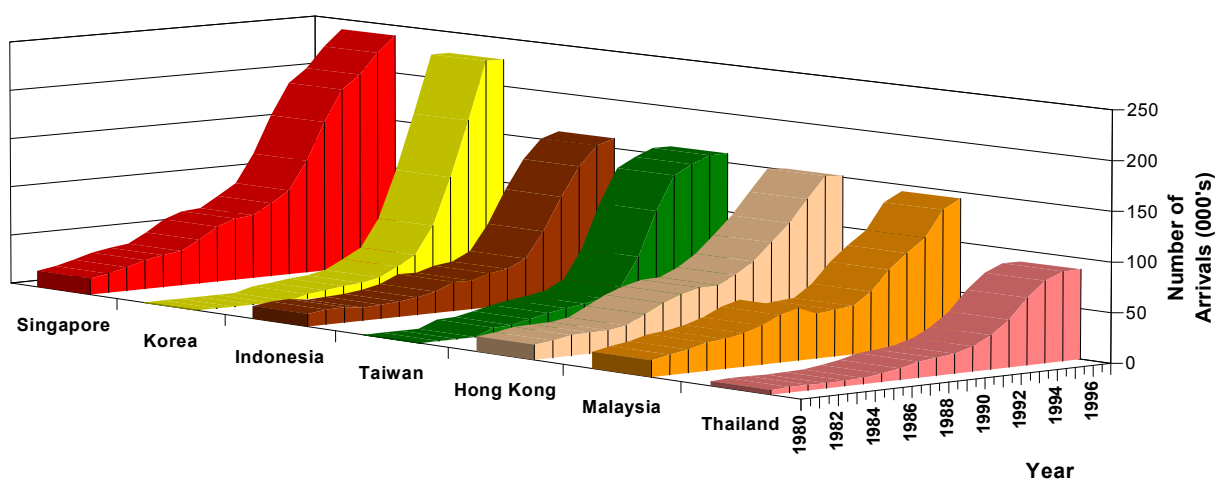


Figure 5.31 Number of Short-Term Overseas Arrivals to Australia from Asian Source Countries (excluding Japan). (1980 – 1997)
(Source: ABS 3401.0 Overseas Arrivals and Departures)

5.4.1.5 Addressing Research Sub-Issue One - Visitor Numbers

An overall measurement of visitation does not clarify the intrinsic complexity of sub-components, despite comprising the total interaction of all these changing components. There are times however, when the overall pattern of visitation may generally match the pattern of one or more of the underlying variables. This may be due to the changes in the most common category, or due to the changes in other variable categories cancelling each other out. However, in the examples above, the total number of visitors does not show the underlying variation of all the sub-categories, thereby supporting the first Research Sub-Issue.

In addition, this Sub-Issue is obviously another variation of the first Research Issue, as the aggregation of variables, whether they are geographical areas or visitor numbers, still results in the smoothing effect. However, an important distinction relevant for this Sub-Issue, is that the underlying change has occurred in the same geographical level, and is therefore important in understanding visitation.

5.4.2 Sub-Issue Two - Seasonality

The second Sub-Issue considers the use of yearly visitor numbers. Yearly measurement obscures the seasonal variation of visitation that has significant impact on tourism destinations.

This Research Sub-Issue will be addressed through an examination of the patterns of change displayed by seasonal visitation variables. As determined in Chapter Four, these variables are quarterly visitor numbers by origin; and monthly occupancy levels in the hotel, motel, and guest house sector, and the caravan park sector.

5.4.2.1 Visitor Numbers to the Sunshine Coast by Quarter

The data on annual visitation to the Sunshine Coast by the origin of the visitor displays clear and separate growth lines for each category (Figure 5.23). However the quarterly data introduces the seasonality effect and demonstrates the complexity within this variable (Figure 5.32).

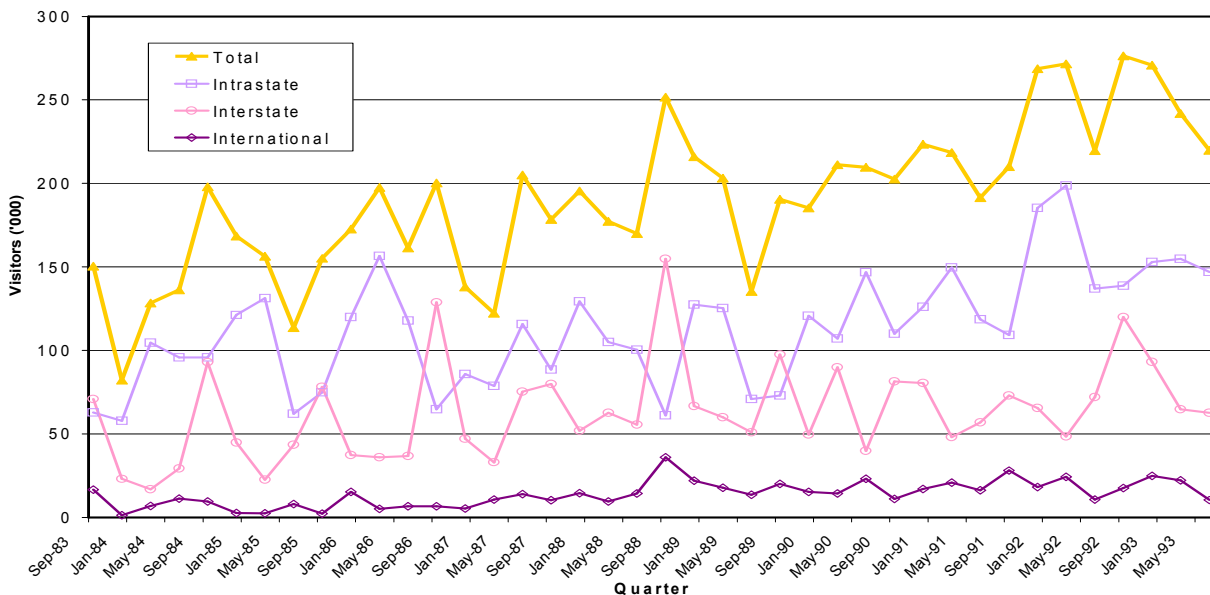


Figure 5.32 Number of Visitors to the Sunshine Coast by Origin: Total Visitors, Intrastate Visitors, Interstate Visitors, and International Visitors. (Quarterly: September 1983 – September 1994) (Source: QTTC/TQ – Major Survey Research Programme and Queensland Visitor Survey)

On a yearly basis the total number of visitors to this destination from within Queensland is generally higher than the number from interstate. This relationship changes when the quarterly data is analysed, as at different times during this eleven year period the number of interstate visitors is higher than the number visiting from within Queensland. From 1983 to the end of 1989, the greater number of Australian visitors to the Sunshine Coast fluctuated between those from Queensland and those from interstate. From 1990 the number of intrastate visitors remained higher than the number from interstate for each quarter, despite the different visitation patterns. The smaller number of visitors from overseas had a limited impact on the total quarterly visitation pattern.

The different domestic visitation patterns of intrastate and interstate visitor numbers becomes clearer when separated from the international and total visitor numbers (Figure 5.33). The peaks in the two categories occur in opposite quarters. The interstate market consistently records its main peak visitation during the September quarter, which coincides with a trough in the number of visitors from Queensland. Usually in the first and last quarters of the year the numbers from Queensland peak, while there is trough in the visitation from interstate. Intrastate visitation then drops for the second quarter, with numbers from the rest of Australia fluctuating.

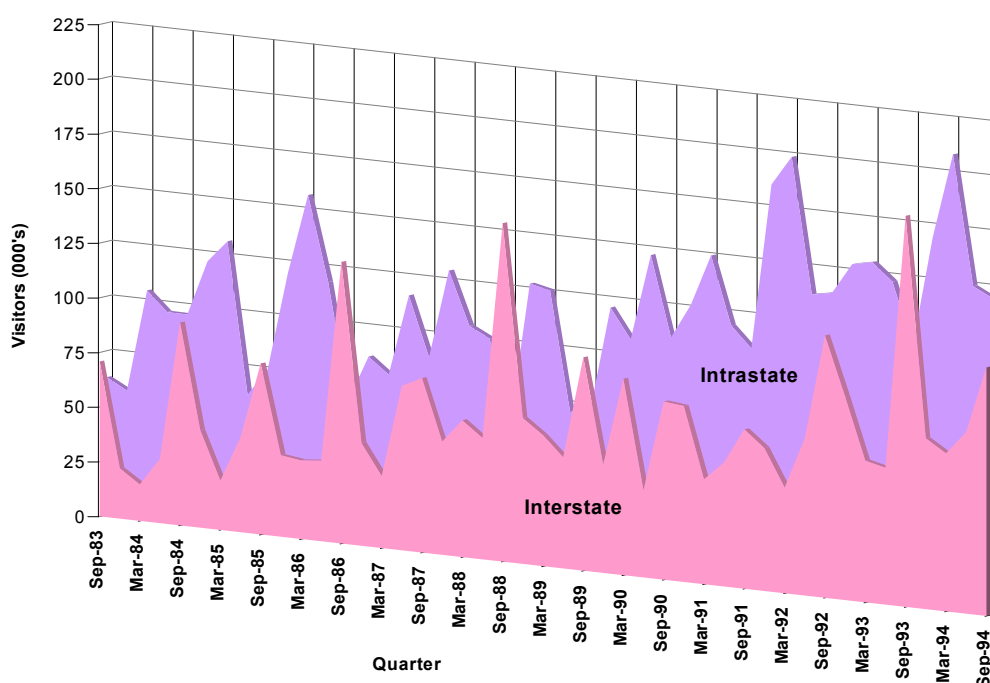


Figure 5.33 Number of Intrastate and Interstate Visitors to the Sunshine Coast. (Quarterly: September 1983 – September 1994) (Source: QTTC/TQ – Major Survey Research Programme and Queensland Visitor Survey)

5.4.2.2 Occupancy Rates on the Sunshine Coast by Month

The level of visitation affects the occupancy levels of the various accommodation providers. The seasonality of visitation to the Sunshine Coast region can be described by the ABS data on monthly occupancy rates. This data is presented for two categories of accommodation providers: hotels, motels, and guest houses; and caravan and camping. The monthly occupancy level of each accommodation category shows the level of variation caused by seasonality.

In addition to plotting the occupancy data, the monthly observations have then been plotted together to illustrate the variation from the trend for each month. This overall trend has been calculated by deseasonalising the data and is presented and discussed in Section 5.4.3.4. The monthly data highlights the level and range of occupancy for each month for the different accommodation categories.

Occupancy Levels in Hotels, Motels, and Guest Houses:

The monthly occupancy level of hotels, motels, and guest houses on the Sunshine Coast (Figure 5.34) demonstrates the seasonality experienced within this region.

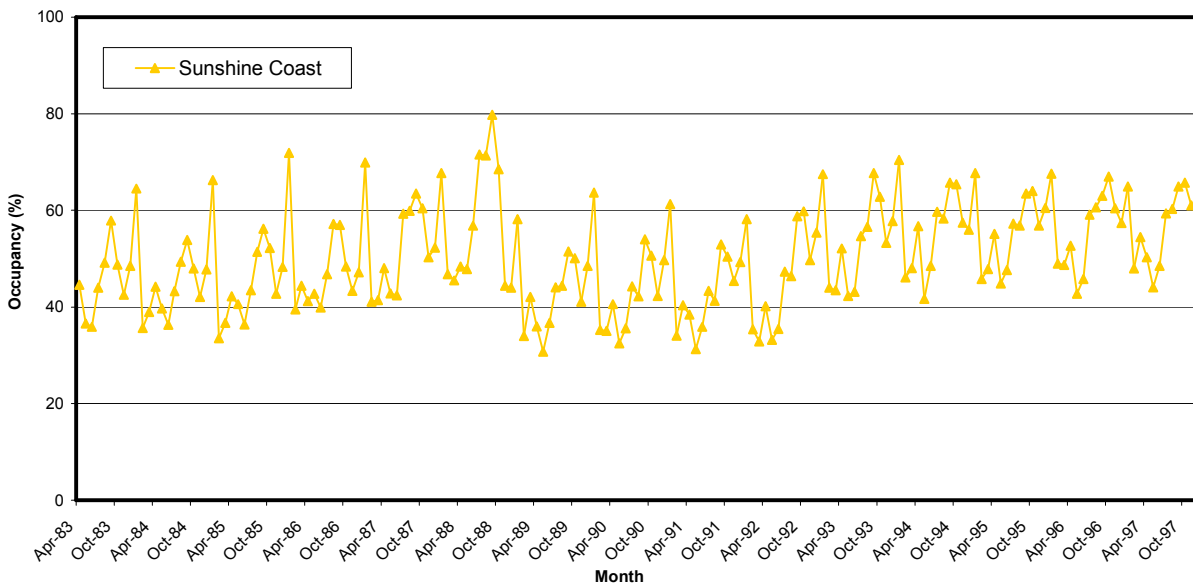


Figure 5.34 Average Room Occupancy Rate in Sunshine Coast Hotels, Motels, and Guest Houses. (Monthly: 1983 – 1997) (Source: ABS 8635.3 Tourist Accommodation)

During this fifteen year period the highest occupancy level reached was 80 percent during Expo 88. This is consistent with the increase in demand by visitors from interstate and overseas during the event. Occupancy levels reached as low as the 30s during the off-peak seasons between the end of the Christmas school holidays and beginning of the Easter break, and between the end of the Easter break and the mid-year holidays, for the years from 1989 to 1992. The drop in occupancy in 1989 corresponds to the large jump in supply after the Hyatt Regency Coolom opened in the second half of 1988 (discussed further in Section 5.4.3.4).

From this data, the occupancy levels for each month of the fifteen years in the hotel, motel, and guest house category, as variation from the trend, has been determined (Figure 5.35). This demonstrates firstly, the difference between the months due to the extent of seasonality within the tourism industry, and secondly, the variation within each month. As each value is plotted against the trend line, the months that are above or below average are identified.

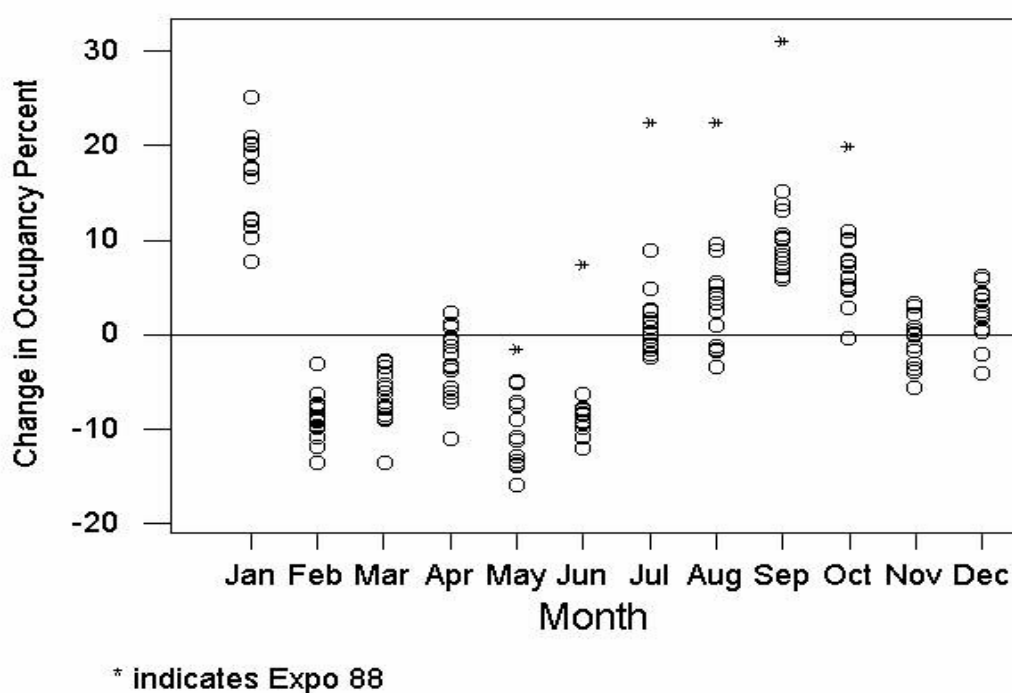


Figure 5.35 Monthly Variation from the Trend in Room Occupancy Rates in Sunshine Coast Hotels, Motels, and Guest Houses. (1983 – 1997)
(Calculated from: ABS 8635.3 Tourist Accommodation by de-trending the data {Lowess = 0.333})

January is consistently the highest occupancy month for this accommodation sector. This is expected as the nation-wide school holidays extend until the last week of January and the average daily temperature of 27°C establishes the beaches of the Sunshine Coast as a popular destination. Occupancy levels for February and March are below the trend with April crossing the average due to the week and a half break for Easter that occurs primarily in this month. May and June occupancy percentages are low with the mid-year holidays increasing the occupancy levels for July. However, the percentages reached for August are not in line with school holidays. These visitors maybe international travellers or visitors from southern states who are not dependant on the school holidays and may wish to escape winter temperatures. The generally higher than average occupancies recorded for September and October can again be linked to the two-week school holidays at this time. November and December record occupancy percentages around the trend.

The occupancy values for the months of Expo 88 (indicated by the * in Figure 5.35) illustrate the effect of the Expo on the occupancy levels of this accommodation sector. The effect occurred for the six months of the event.

After excluding the effect of Expo 88 on occupancy, the level of variation within each month ranges from 5.75 percent for the month of June to 17.5 percent during January. This variation is due to the numerable factors that have affected occupancy over the fifteen years.

The data has also been separated into the divergent periods that are evident in the seasonality pattern of occupancy levels over the fifteen years (Figure 5.34). The first period lasted from April 1983 to October 1988, the second from October 1988 to February 1989, the third from February 1989 to June 1992, and the fourth from June 1992 to December 1997. The trajectories for each of the four periods will be discussed further in Section 5.4.3.4.

This analysis considers the seasonality patterns displayed in each of the different time frames. The focus is on the first, third and fourth periods as the second period only lasted five months, thereby not presenting even a full year of seasons.

In the first time frame (Figure 5.36), from April 1983 to October 1988, the January occupancies provide the main peak, with the exception of occupancy levels during Expo 88.

The second highest peak widened over this five year period, changing from a September peak in 1983, to a four month high by 1987, extending from July to October. In addition the occupancy level ranged considerably during this period, usually varying between 33 and 72 percent, with the atypical high of 80 percent recorded during Expo 88. The median occupancy was 48 percent.

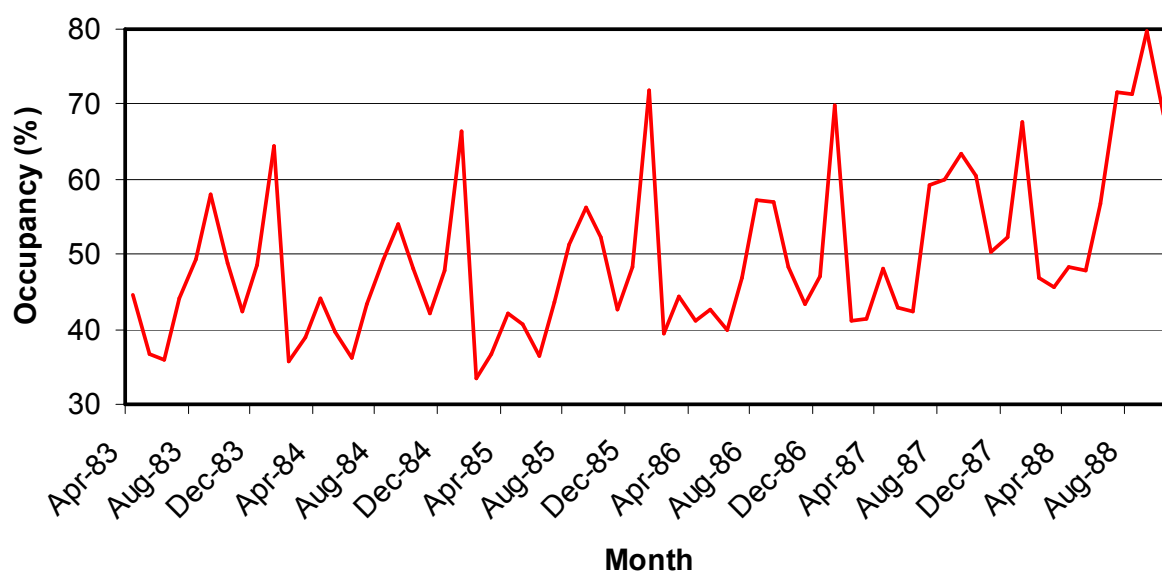


Figure 5.36 Trajectory One: Monthly Room Occupancy Rates in Sunshine Coast Hotels, Motels, and Guest Houses from 1983 to 1988.
(Source: ABS 8635.3 Tourist Accommodation)

In the 1989 to 1992 period (Figure 5.37), the seasonality pattern had four different sized peaks each year. January was still the highest occupancy month. This was followed by the September peak, then July, and the lowest peak occurred for the Easter break. This differed from the usual three peaks in the first period. A second difference between these two periods was that the occupancies were generally lower across the board between 1989 and 1992. The median level was 41 percent, 7 percent lower than the first period, and the occupancy level ranged from 30 to 64 percent.

From mid 1992, the pattern changed again (Figure 5.38). The lowest yearly occupancies rose from 30 to above 40 percent. The peak months also recorded higher occupancies than the previous period, and similar occupancy rates to the first trajectory. However, the height achieved during Expo 88 was not matched. In addition, occupancy levels from 1993 onwards generally stayed over 55 percent for the seven consecutive months each year from July to January. In the previous period, only the month of January was over 55 percent.

Due to this rise in the occupancy rates the median level attained in this post 1992 period was 57 percent.

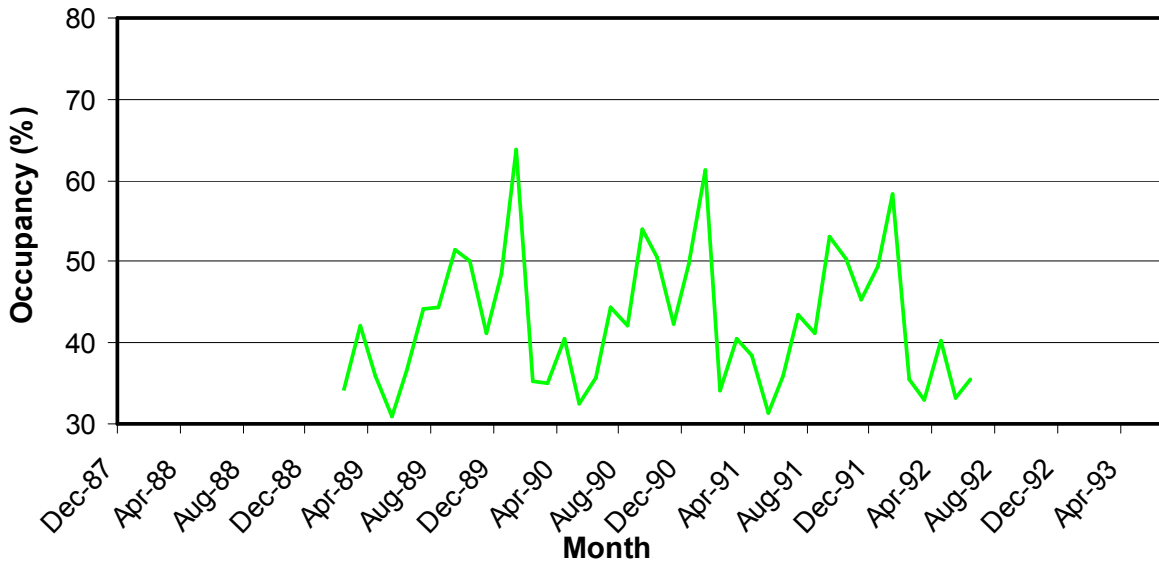


Figure 5.37 Trajectory Two: Monthly Room Occupancy Rates in Sunshine Coast Hotels, Motels, and Guest Houses from 1989 to 1992.
(Source: ABS 8635.3 Tourist Accommodation)

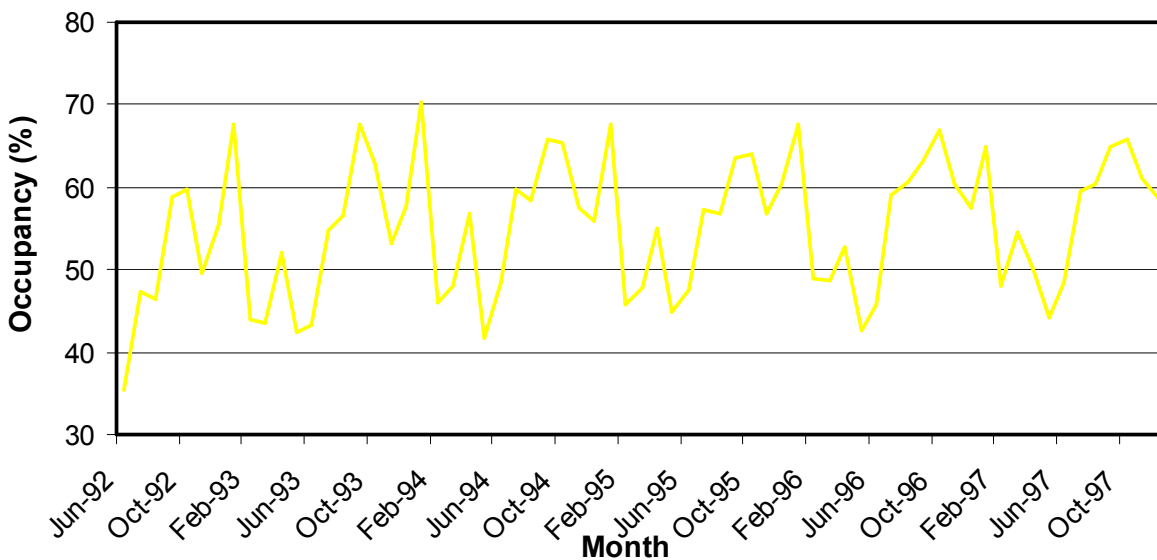


Figure 5.38 Trajectory Three: Monthly Room Occupancy Rate in Sunshine Coast Hotels, Motels, and Guest Houses from 1992 to 1997.
(Source: ABS 8635.3 Tourist Accommodation)

A significant difference between the three periods was the change in the base line occupancies (Figure 5.39). The initial increase in the yearly low occupancies ended in 1989, when the rate dropped and stayed below those for the first period. In addition the jump in the yearly lows from 30 percent during the middle period to 40 percent in the last period is clearly illustrated. The discussion of the events that occurred around the change points between each period will be included in analysis of the changing occupancy trajectories in Section 5.4.3.4.

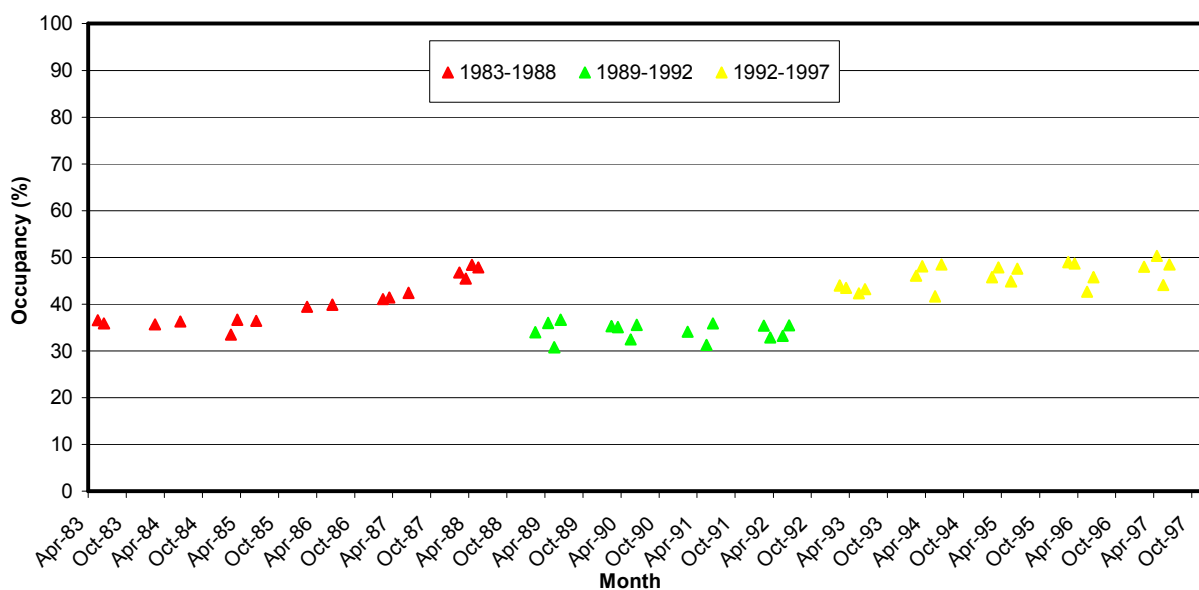


Figure 5.39 Yearly Low Occupancy Rates in Sunshine Coast Hotels, Motels, and Guest Houses. (Monthly: 1983 – 1997) (Source: ABS 8635.3 Tourist Accommodation)

The changing patterns of visitor seasonality for the Sunshine Coast hotel, motel, and guest house sector are not reflected in the visitor number patterns. The data on the visitors staying in commercial accommodation, both on a yearly basis (Figure 5.23), and on a quarterly basis (Figure 5.32) exhibit different patterns, as total visitation, although fluctuating, generally continued to rise.

Occupancy Levels in Caravan Parks:

The monthly occupancy level of the sites in caravan parks (Figure 5.40), like the occupancy percentages for hotels, motels, and guest houses, illustrates the seasonality experienced within the Sunshine Coast.

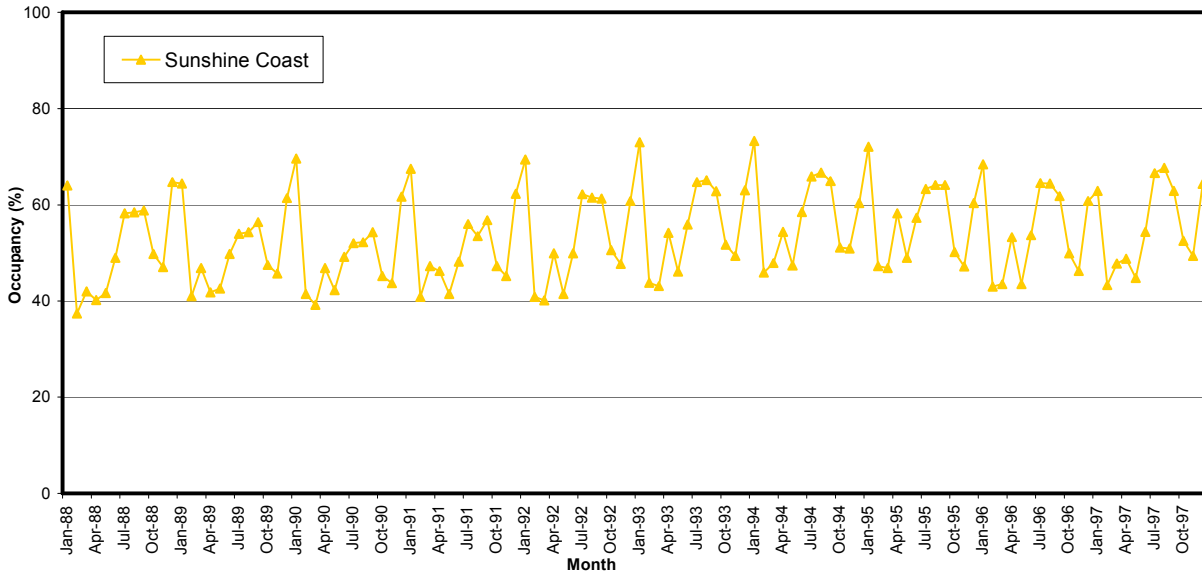


Figure 5.40 Average Site Occupancy Rate in Sunshine Coast Caravan Parks. (Monthly: 1988 – 1997) (Source: ABS 8635.3 Tourist Accommodation)

During the ten-year period from January 1988 to December 1997 the highest site occupancy levels attained were between 72 and 73.5 percent for January 1993, 1994, and 1995. This is due to the combination of the peak occupancy month with the slightly higher occupancy trend during these three years.

The lowest occupancy level during this decade was 37.5 percent recorded in February 1988. February is normally a low occupancy month (Figure 5.41), but this was recorded before the significant increase in the number of caravan parks occurred in second half of 1988. This low occupancy for caravan parks during February 1988 is in contrast with the occupancy level recorded for hotels, motels, and guest-houses for the same month, as the occupancy for these establishments reached the highest level for any February in the fifteen year period.

As with the above accommodation category, the average caravan park occupancy levels for each month of the ten years (Figure 5.41) reveals firstly, the difference between the months due to the extent of seasonality within the tourism industry, and secondly, the variation within each month. Each value is plotted against the trend line, to ensure that months that are above or below average can be identified. This trend line will be presented and discussed in Section 5.4.3.4.

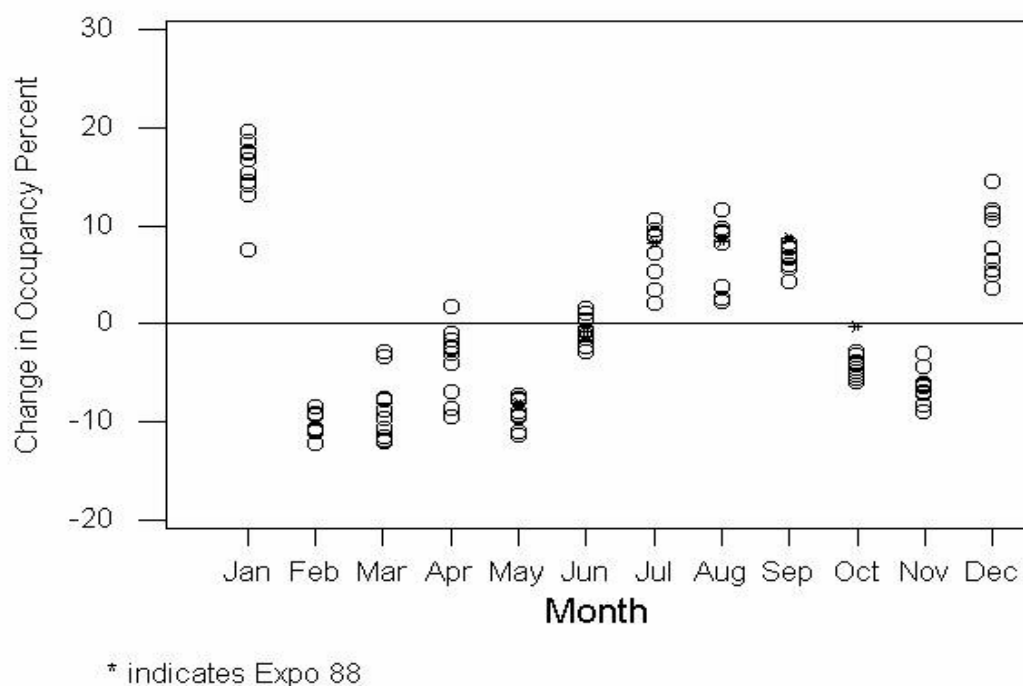


Figure 5.41 Monthly Variation from the Trend in Site Occupancy Rates in Sunshine Coast Caravan Parks.
(Calculated from: ABS 8635.3 Tourist Accommodation by de-trending the data {Lowess = 0.333})

The first five months of the year follow a similar pattern to the occupancy of hotels, motels, and guest houses for the same ten year period. January is above the trend, February, March, and May below, and April crossing the line. Then the pattern diverges, with occupancies for June fluctuating around the trend line, in contrast to the significantly lower occupancies for the hotel, motel, and guest house sector. Occupancy rates for July and August have a base level above the trend, which is higher than those for hotels, motels, and guest houses. Caravan park occupancies for October and November are lower than the trend, and lower than the occupancies in the hotel, motel, and guest house sector. Distinct from the trend in hotels, motels, and guest houses, the December occupancies are noticeably higher for caravan parks. This results in the caravan parks providers attaining high occupancy for the whole Christmas school holiday period, extending through December and January. As with hotels, motels, and guest houses, January is usually the highest occupancy month for caravan parks, however this is closely followed by occupancies for December in the caravan park sector.

The occupancy values for the months of Expo 88 (indicated by the * in Figure 5.41) show the limited effect of the Expo on the Sunshine Coast caravan parks. Such a small impact resulted in occupancy levels within the normal range for all months except October, the last month of the Exposition. Despite the limited effect of Expo the two months following the event recorded their highest levels of occupancy when compared to the rest of the decade.

Outside the months of Expo 88 the level of variation in occupancy within each month ranges from 3 percent for the month of October to 12 percent during January. As with hotels, motels, and guest houses this range is due to the various factors which have impacted on occupancy levels. The level of variation within each month is lower for caravan parks than for hotels, motels, and guest houses.

5.4.2.3 Addressing Research Sub-Issue Two - Seasonality

Seasonal data shows the variation that occurs within a single year. These fluctuations are masked in yearly data measurements. Data that is provided quarterly or monthly demonstrates the effects of seasonality on the destination. As this seasonality is an inherent factor in the tourism industry, its impact can only be determined if seasonal, rather than yearly data is analysed. This supports the second Research Sub-Issue, that yearly data obscures the seasonal variation.

5.4.3 Sub-Issue Three - Other Variables

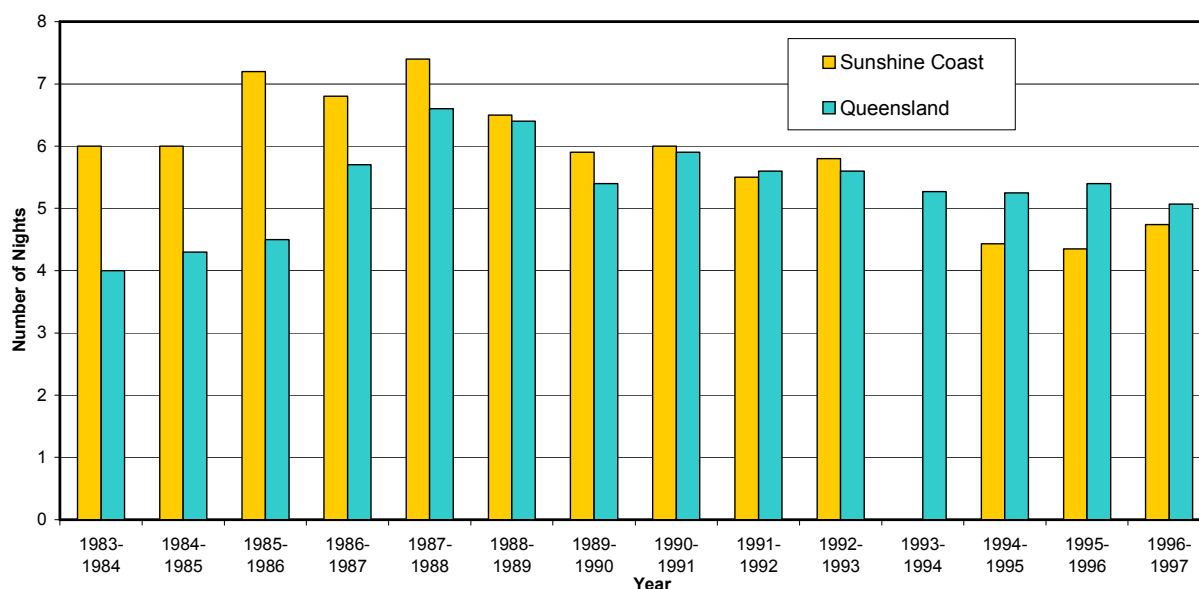
The third Sub-Issue states that: **other data needs to be analysed alongside visitor numbers in order to determine the effect of changing trends.** The pattern of visitation in a region is not necessarily the only pattern of tourism change for the destination, as other variables may demonstrate alternate change patterns.

This Research Sub-Issue will be addressed through an examination of the patterns of change displayed by variables on aspects of visitation. As determined in Chapter Four, these variables are length of stay, occupancy rates, visitor expenditure, and takings by two types of accommodation providers: hotels, motels, and guest houses; and caravan parks.

5.4.3.1 Average Length of Stay on the Sunshine Coast

The average length of stay by visitors in commercial accommodation on the Sunshine Coast, as recorded QTTC/TQ, has ranged from four to seven and a half nights over the fourteen years the surveys were conducted (Figure 5.42).

Figure 5.42 Average Length of Stay in Queensland and on the Sunshine Coast.



(1983/84 – 1996/97)

(Source: QTTC/TQ – Major Survey Research Programme and Queensland Visitor Survey)

For the first two years, from 1983-84, the average length of stay on the Sunshine Coast was six nights. This increased to around seven nights for the subsequent three years before beginning a gradual decline to around four and a half nights during the mid 1990s.

This range in the average length of stay can have a significant effect on visitor nights. Hypothetically, if the same number of people had visited the Sunshine Coast in 1987/88, as for 1995/96, there would have been about 40 percent less visitor nights in the second year, due to the decrease in the length of stay.

The data on the yearly average length of stay in Queensland forms a smoother pattern than the Sunshine Coast data, thereby further supporting Research Issue One on area aggregation resulting in smoother patterns.

During the initial two years of the survey, the average length of stay on the Sunshine Coast was one and a half times the State average. The rise over the following few years was

greater for Queensland than the Sunshine Coast. Since the late 1980s the length of stay has generally been falling. This trend toward short breaks is greater at the regional level, with the length of stay for Queensland in 1996/97 remaining above the early 1980s figure. The trend from long stays in the 1980s to short stays in the 1990s appears more significant on the Sunshine Coast than the Queensland average.

Data on the length of stay highlights the importance of encouraging visitors to stay longer, or attracting long staying visitors, as this can be just as significant to a destination, as simply aiming for increased visitor numbers.

Obviously, this highlights the use of data of both visitor numbers and visitor nights in understanding destination change, as the second variable incorporates the impact of both the number of visitors, and their length of stay.

5.4.3.2 Visitor Expenditure on the Sunshine Coast

This section considers the revenue received by the Sunshine Coast tourism industry. Data on the expenditure level of visitors to the region is provided by two sources, QTTC/TQ and OESR.

Total Yearly Visitor Expenditure:

Data from the QTTC/TQ Major Survey Research Programme (MSPR) and the Queensland Visitor Survey (QVS) includes the total yearly expenditure by visitors on the Sunshine Coast. This data, which has been CPI adjusted, shows an overall escalation in expenditure of more than 500 percent over the fourteen years that the surveys were conducted (Figure 5.43).

There was initially a jump in annual expenditure of nearly 90 percent from 1983/84 to 1984/85. This can be considered the result of a 30 percent increase in the number of visitors using commercial accommodation, discussed above (Figure 5.23) and a 40 percent change in the average expenditure per night. Analysis of the rise in visitation on its own, would not show the more significant leap in the amount of revenue received by the region from tourism, as demonstrated by this variable.

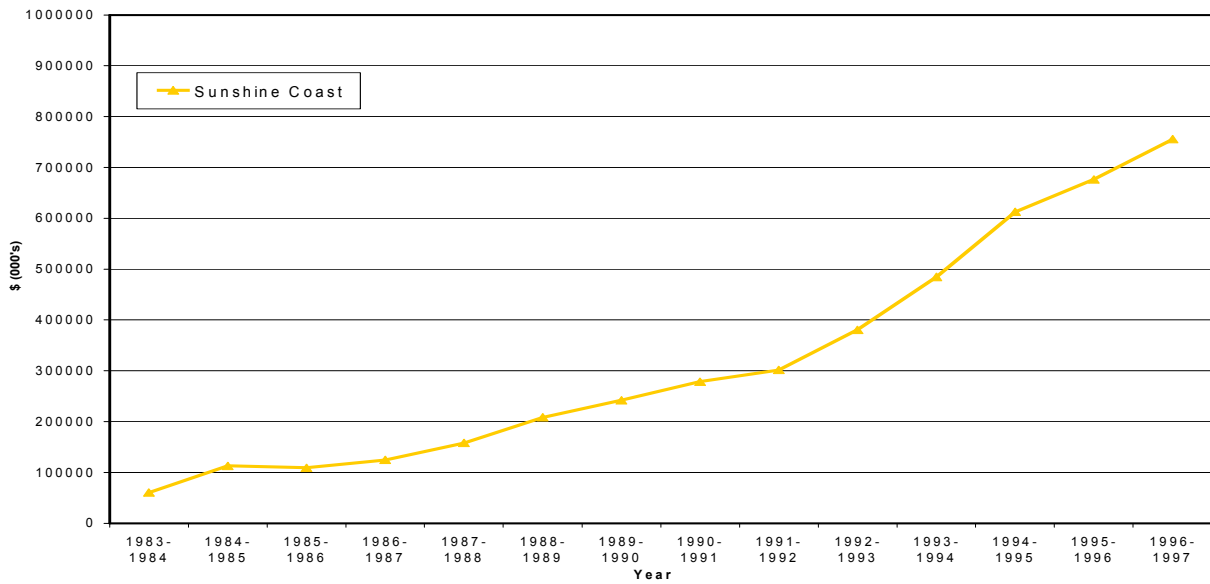


Figure 5.43 CPI Adjusted Total Sunshine Coast Visitor Expenditure. (1983/84 – 1996/97)
 (Calculated From: QTTC/TQ – Major Survey Research Programme and Queensland Visitor Survey and ABS 6401.1 CPI)

The following year saw a slight decline in total visitor expenditure, but since then expenditure has continued to increase. This growth generated an increase of almost 95 percent over the six years from 1985/86 and an additional 123 percent in the following five years till 1996/97. This has been a rise of between about 10 to 30 percent per year (Figure 5.44).

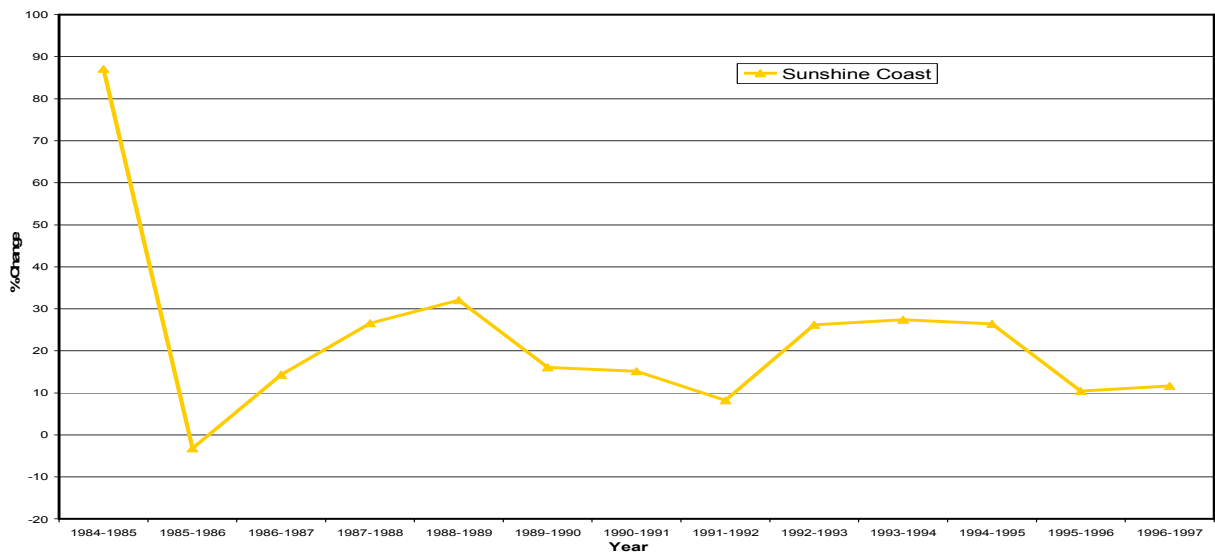


Figure 5.44 Percentage Change from the Previous Year for the CPI Adjusted Total Sunshine Coast Visitor Expenditure. (1984/85 – 1996/97)
 (Calculated From: QTTC/TQ – Major Survey Research Programme and Queensland Visitor Survey and ABS 6401.1 CPI)

It is notable that 1988/89, while recording an increase in expenditure of 32 percent on the previous year, which is higher than all years after the dramatic growth for 1984/85, was not a record year for visitation. This again illustrates the impact of tourism variables other than the number of visitors for understanding the changing tourism destination phenomenon, particularly in this case the economic impact.

Total Yearly Visitor Expenditure by Origin:

The OESR also provides data on the total yearly visitor expenditure. This data, from 1985 to 1999, and expressed in current financial terms, is separated into the annual expenditure levels of visitors from Queensland, interstate, and overseas (Figure 5.45).

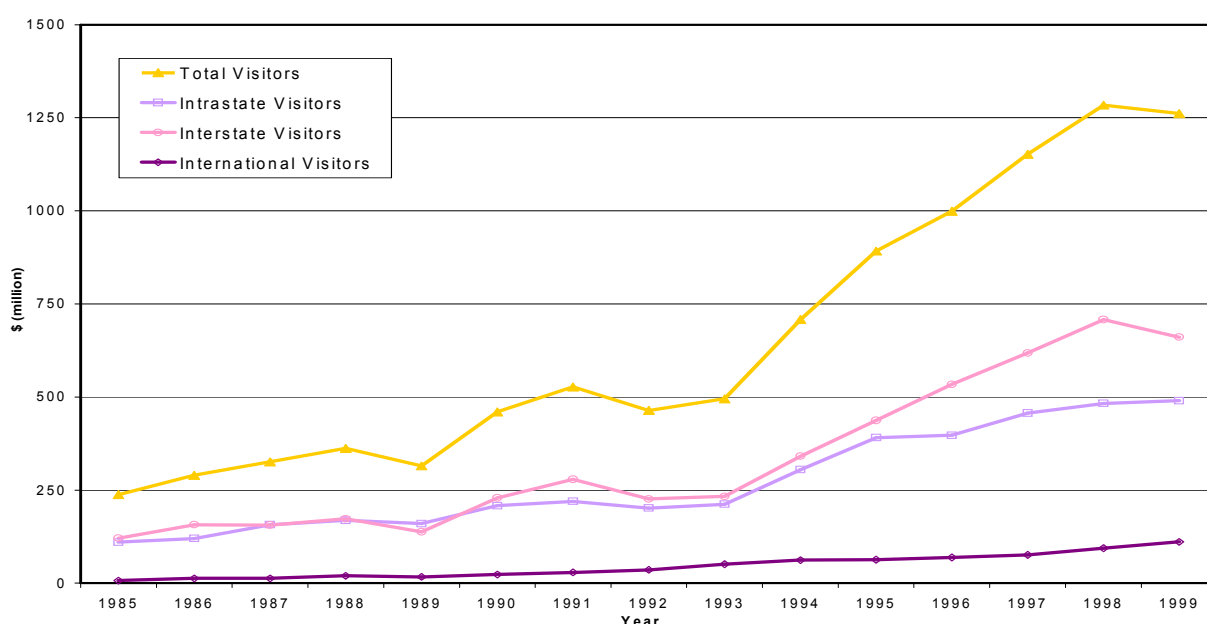


Figure 5.45 Sunshine Coast Visitor Expenditure in Real Dollars by the Origin of Visitors. (1985 – 1999)
 (Source: OESR – Visitor Expenditure in Regional Queensland)

This data shows a similar pattern to the data provided by TQ for the overlapping years (Figure 5.43), with the continual growth in expenditure accelerating from the early 1990s. The separation of expenditure into the visitor origins also supports the previous Sub-Issue of Visitor Sub-Categories as, for example, the decline in total expenditure for 1999 did not represent a decline in all sub-categories, as only the expenditure received from interstate visitors dropped.

Although the international visitors only contribute a small percentage of the total visitor expenditure on the Sunshine Coast, this spending has increased by over three times the percentage rise in the other markets, growing at an average of 22 percent per year for the fourteen years.

From 1985 to 1995 the pattern of total spending by Queenslanders and visitors from interstate was similar. This was despite Queenslanders representing over 20 percent more of the visitor nights during this decade (Figure 5.22). The continuing growth in total expenditure during the second half of the 1990s appears to be primarily due to increased spending by those from interstate. The level of visitor expenditure can therefore be seen to exhibit different patterns to those for visitor numbers or visitor nights.

Average Expenditure per Visitor Night:

The level of expenditure can also be expressed as an average per visitor night. This has then been divided into the main categories of expenditure: accommodation, food and beverages, and other expenses. This data is also sourced from QTTC/TQ (Figure 5.46).

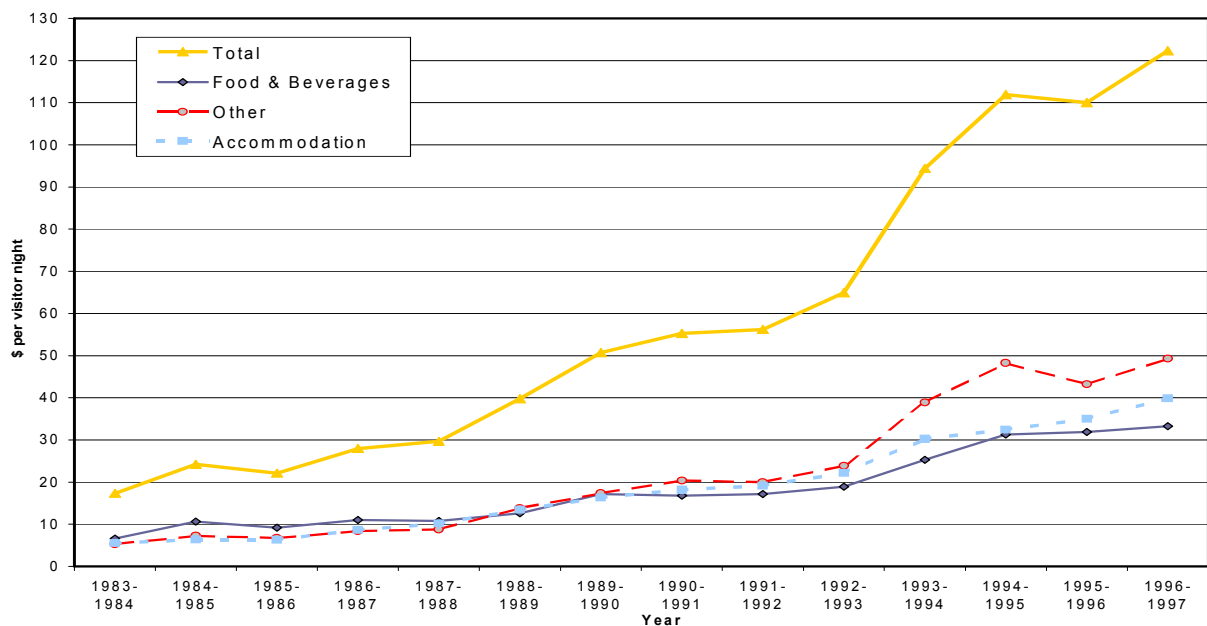


Figure 5.46 Sunshine Coast CPI Adjusted Average Expenditure per Visitor Night by Category. (1983/84 – 1996/97)
 (Calculated From: QTTC/TQ – Major Survey Research Programme and Queensland Visitor Survey and ABS 6401.1 CPI)

Between 1983/84 and 1992/93, the average expenditure per visitor night seemed to be relatively evenly split between the three categories of accommodation, food and beverages, and other expenses. Since then, the spending on other products and services has increased in advance of the accommodation, and the food and beverage categories.

Over the fourteen years, the average expenditure has risen from under \$20 per night to over \$120. This increasing expenditure per visitor night, combined with the rise in the number of visitor nights (Figure 5.21), is represented by the large annual growth rate in total expenditure within the Sunshine Coast region, discussed above.

5.4.3.3 Takings by Accommodation Providers on the Sunshine Coast

This section considers the revenue received by the accommodation providers on the Sunshine Coast. This provides an additional variable for considering revenue generated by tourism. The demand side data from the visitors provided the level of visitor expenditure, discussed above. Incorporating data from the supply side generates a more complete picture. This data is sourced from the ABS and incorporates the takings of two accommodation provider categories.

The level of takings are provided on a monthly basis for the hotels, motels, and guest houses sector, and the caravan park sector. As with the occupancy data, this monthly data on takings varies significantly due to seasonality. The analysis also shows the overall trend of this irregular data, using a Lowess Scatter-Plot Smoother to deseasonalise the observations and reveal the underlying trend. In addition, the observations for each month are plotted together to illustrate the variation for each month from the trend line.

Takings from Hotels, Motels, and Guest Houses:

The level of CPI adjusted takings received by the hotel, motel, and guest house providers on the Sunshine Coast has risen over time (Figure 5.47). In 1984, the takings received totalled slightly less than five million dollars. By 1997 this has escalated to just under 76 million dollars. The annual takings have continually increased each year with a significant jump of over 10 million dollars from 1992 to 1993.

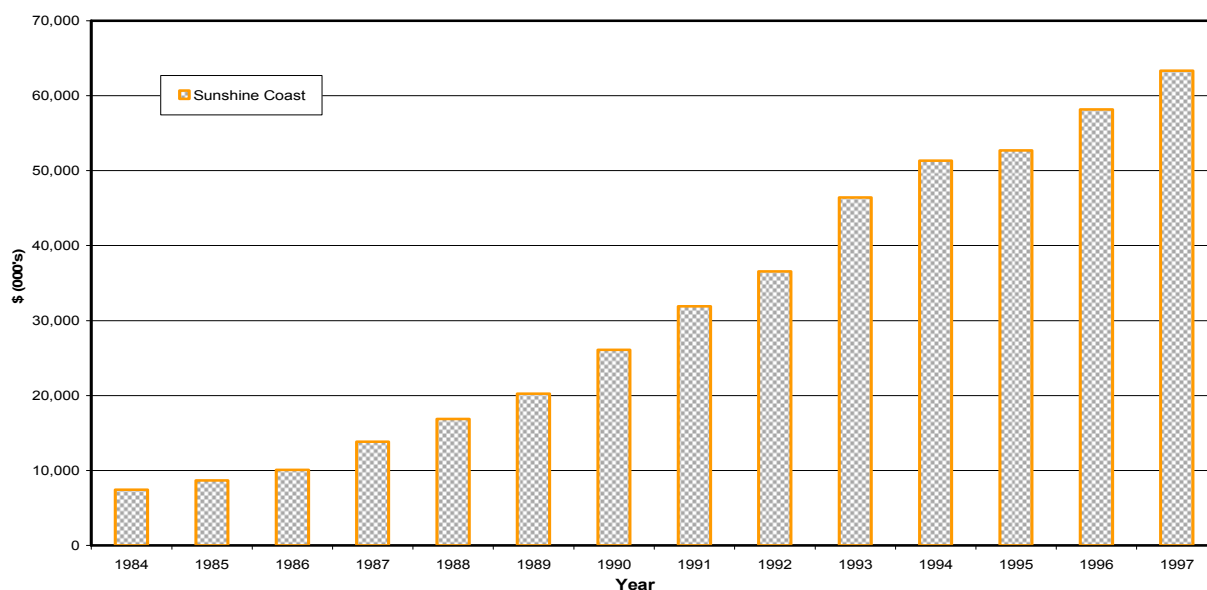


Figure 5.47 CPI Adjusted Yearly Takings from Sunshine Coast Hotels, Motels, and Guest Houses. (1984 – 1997)
(Calculated From: ABS 8635.3 Tourist Accommodation and 6401.1 CPI)

The doubling of the number of available rooms in hotels, motels, and guest houses on the Sunshine Coast (Section 5.3.1.2) occurred during the four year growth period, from the beginning of 1987 to the end of 1990. As the number of rooms multiplied so did the total annual takings. With annual increases in takings of between 29 to 47 percent, this development phase recorded the highest growth percentages of the fourteen-year period. By 1990, this accommodation sector had increased the annual takings to nearly three and a half times the predevelopment level of 1986. Such an increase in takings would be expected if the demand for rooms increased in the same vein as supply, but there was only a 22 percent increase in the number of visitors utilising commercial accommodation during this four year period (Figures 5.24, 5.25 & 5.26).

During this four year growth period, the average expenditure on accommodation rose from ten dollars per night to seventeen (Figure 5.46). The drop in the hotel, motel, and guest house occupancy trend (Figure 5.34 and Figure 5.56), which corresponds with the increase in the number of rooms in this sector does not appear to have negatively affected the increasing annual takings trend. Interestingly, this indicates that the pattern displayed by the data on yearly takings during the development period, appears to fit the growth pattern in the number of rooms in the hotel, motel, and guest house sector, rather than the patterns exhibited by visitor numbers or occupancy levels.

In general, the post-development rise in occupancy levels from 1991 does not appear to have resulted in greater percentage increases in yearly takings. However, the jump of 10 million dollars in yearly takings between 1992 and 1993 does correlate with the shift in occupancy levels at this time (Figure 5.34). The average nightly accommodation expenditure also correlates with the increased takings, rising from \$17 to \$27 per night, per visitor utilising commercial accommodation between 1991-92 and 1993-94 (Figure 5.46).

As discussed in the previous Sub-Issue on seasonality (Section 5.4.2), separating the yearly data variables into their quarterly or monthly values illustrates the significance of seasonality. Breaking the yearly takings from hotels, motels, and guest houses into the level of takings per month also shows the effect of seasonality on this accommodation sector (Figure 5.48).

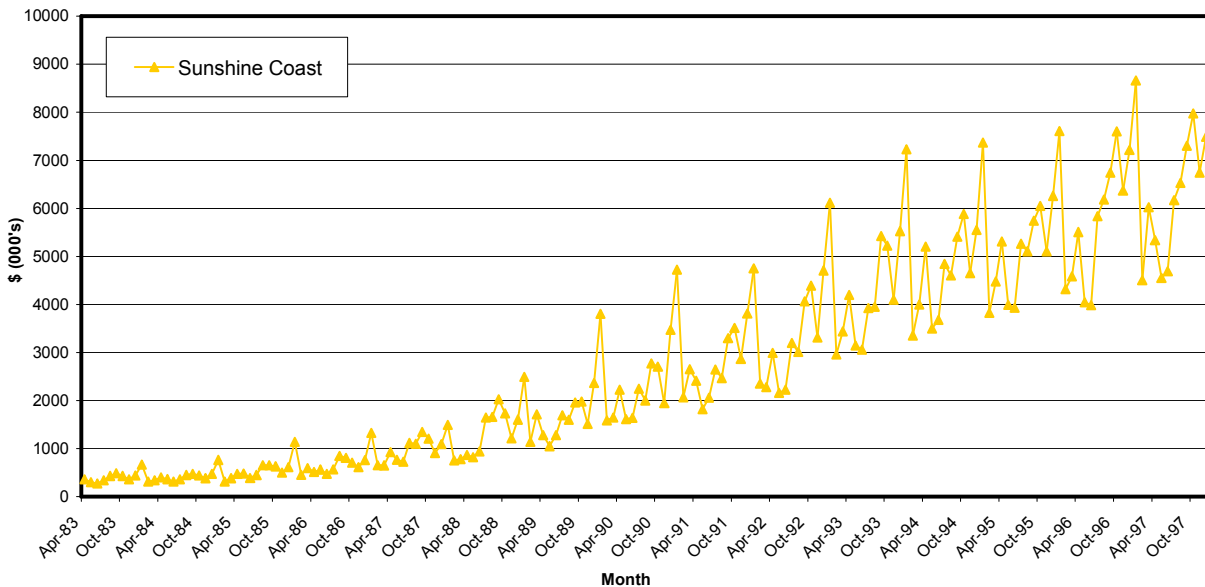


Figure 5.48 CPI Adjusted Monthly Takings from Sunshine Coast Hotels, Motels, and Guest Houses. (Monthly: 1983 – 1997) (Calculated From: ABS 8635.3 Tourist Accommodation and 6401.1 CPI)

With respect to takings within the Sunshine Coast region, the extent of this seasonality has been increasing over time. The range in monthly takings over the first year (April 1983 – March 1984) was under four hundred thousand. By 1997, this variation had extended out to over four million dollars, a ten-fold increase. In both cases January recorded the highest level of takings for the year.

In addition to the increase in the range in monthly takings over time, the pattern of the initial five years appears to differ from the subsequent years (Figure 5.49). From early 1983 to mid 1988, the monthly takings for this accommodation sector peaked in January, with two smaller rounded increases around April and August/September. From 1988, takings from July became significant. This linked to a further peak for September/October. Easter holidays, fluctuating between March and April also continued to provide a period of increased takings. January still maintained its position as the leading month for accommodation takings, although the Christmas holiday period extended, with December takings increasing considerably. The reasonably high level of takings for August links the twin peaks of July and September/October. This yield from August is consistent with the level of occupancy attained (Figure 5.35), despite this month not occurring during the school holidays.

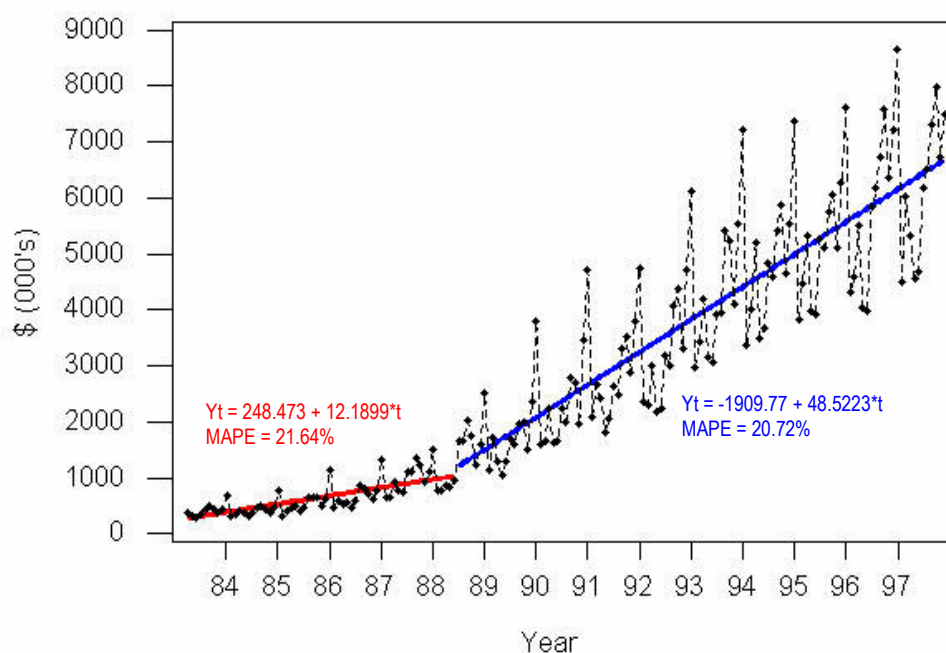


Figure 5.49 Trajectory Changes in the Monthly Takings from Sunshine Coast Hotels, Motels, and Guest Houses.
(Calculated from: ABS 8635.3 Tourist Accommodation using a Linear Trend Model)

The long term trend (Lowess=0.333) in the level of takings from hotels, motels, and guest houses in the region was increasing at an increasing rate (Figure 5.50). This was evident from the data on yearly takings (Figure 5.47). The scatter of the data points around the trend line also illustrates the widening gap in the range of monthly takings. The significant increase in takings has been so great that January 1993 had more takings in the one month than the total for the year of 1984.

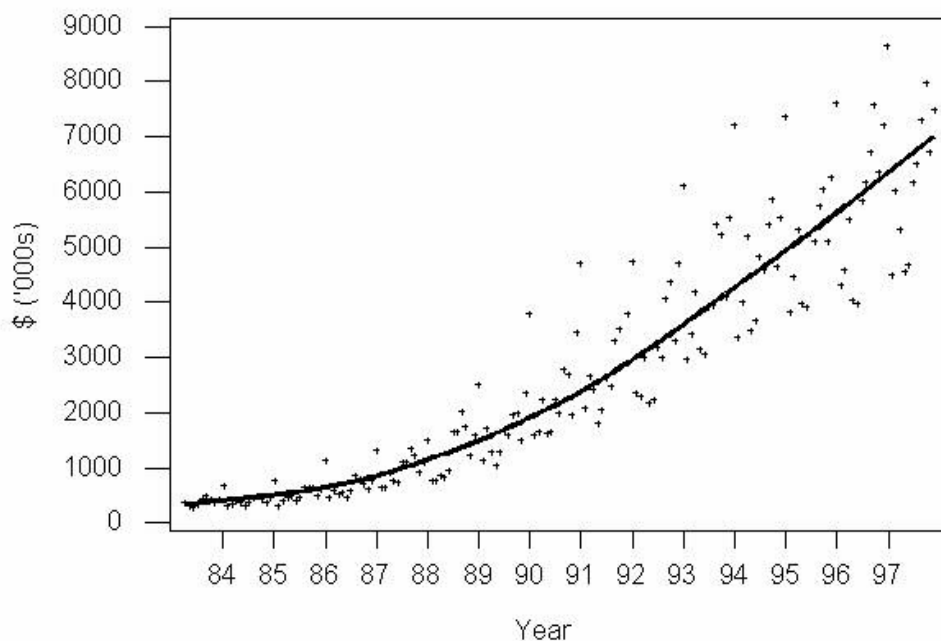


Figure 5.50 Long Term Trend in the Takings from Sunshine Coast Hotels, Motels, and Guest Houses. (Calculated from: ABS 8635.3 Tourist Accommodation using a Lowess Scatter-Plot Smoother {Lowess = 0.333})

The average level of takings for each month (Figure 5.51) illustrates the difference between the months and the variation within each month over the fourteen years. Each data point is plotted against the trend line to identify months that are above or below average. As mentioned January is the highest takings month. With peaks for the holidays, and the increased occupancy for August, the troughs occur in February, May and June. The lowest grouping for the month of January all occurred before 1989 and are, as expected, lower than the subsequent takings for this month. February through to July in both 1996 and 1997 recorded takings well below the trend. Despite these low periods, the intervening second six months of 1996 saw the highest takings for October and November, in relation to the long-term trend.

The monthly variation correlates with the pattern produced by the occupancy levels of hotels, motels, and guest houses, although the range within each month differs (Figure 5.35). For example, in comparison to the other months, August is quite compact in the range of takings but spread out for occupancy. In contrast, June (excluding Expo 88) is packed together for occupancy but widely spread for takings.

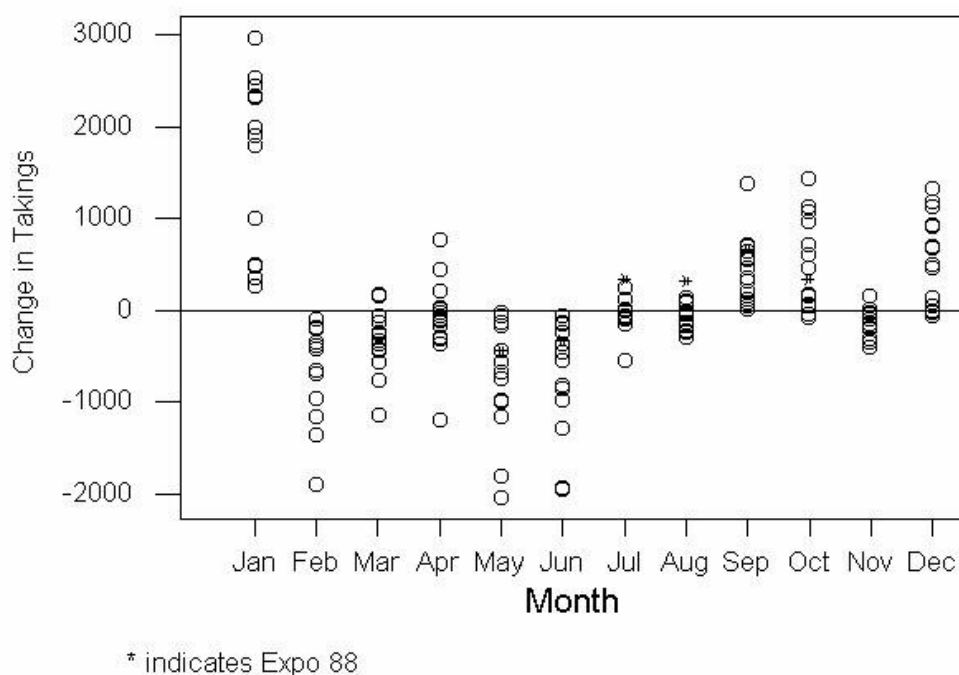
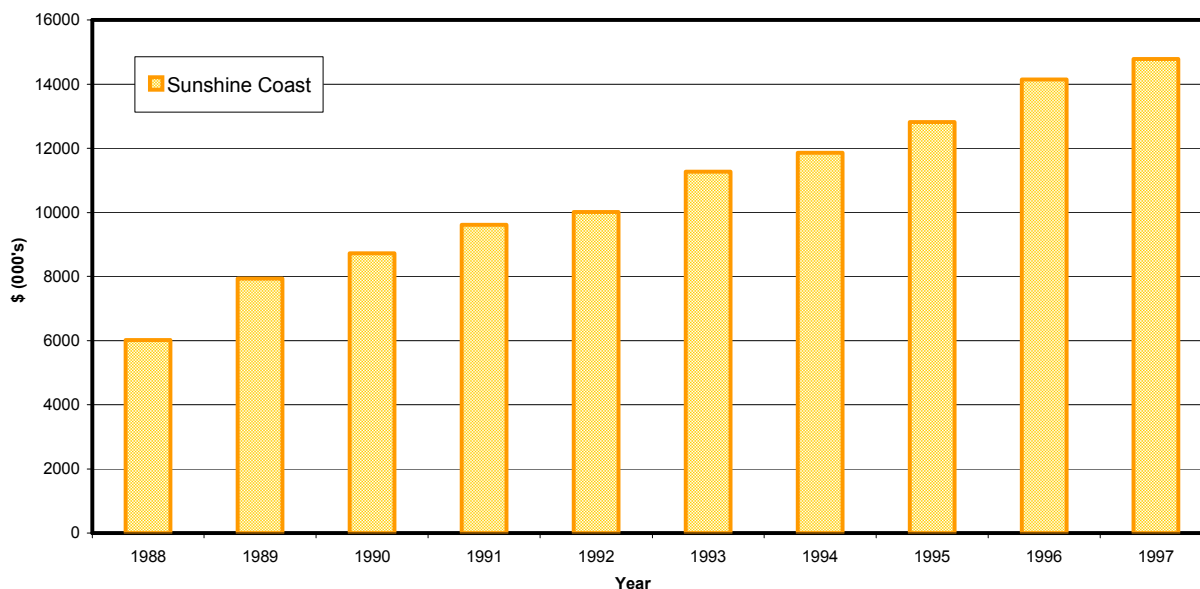


Figure 5.51 Monthly Variation from the Trend in the Takings from Sunshine Coast Hotels, Motels, and Guest Houses.
(Calculated from: ABS 8635.3 Tourist Accommodation by de-trending the data {Lowess = 0.333})

Unlike the impact on the occupancy from Expo 88 on hotels, motels, and guest houses (Figure 5.35), the data points for takings during Expo (indicated by the * in Figure 5.51) do not stand out. Only the takings for July and August are at the highest point from the trend, but they are still consistent with the monthly range.

Takings from Caravan Parks:

The total amount of CPI adjusted takings received by caravan parks on the Sunshine Coast rose for each year of the 1988 to 1997 period (Figure 5.52). The greatest yearly increase in takings occurred for 1989 which recorded a 30 percent rise, equating to almost 2 million dollars. This jump correlates with the increase in the number of caravan parks and the corresponding total site capacity. The number of caravan parks rose 48 percent, from 29 to 43, between March 1988 and March 1989. Since then the total number of caravan parks has been slowly declining, with a gradual increase in the average capacity. Takings from caravan parks, although not climbing by the 1989 amount, continued to rise.



**Figure 5.52 CPI Adjusted Yearly Takings from Sunshine Coast Caravan Parks.
(1988 – 1997)
(Calculated From: ABS 8635.3 Tourist Accommodation and 6401.1 CPI)**

When compared to the takings by the hotel, motel, and guest house category the actual takings are noticeably less, with the hotel, motel, guest house sector takings for 1988 already exceeding the level of takings reached in 1997 by caravan parks. Additionally the increase in caravan park takings has been only a fraction of that attained by the hotel, motel, and guest house sector, 150 percent verses almost 400 percent respectively over the decade. The significant jump in takings in the hotel, motel, and guest house sector occurred in 1993. This year was not as noteworthy in the caravan park sector, with 1989 recording the greatest leap. The takings in both accommodation sectors have risen every year despite fluctuating visitor numbers, changing occupancies, and varying numbers of providers and capacities.

Consistent with the other monthly data, the breakdown of the takings from caravan parks into the level of takings per month, shows the effect of seasonality (Figure 5.53). Although this seasonality has increased in range over time, as it did for the hotel, motel, and guest house sector, it has not been as marked for the caravan park sector. The range has changed from \$440 thousand dollars in 1989 to \$670 thousand by 1997. In both years January was the highest month for takings and February the lowest.

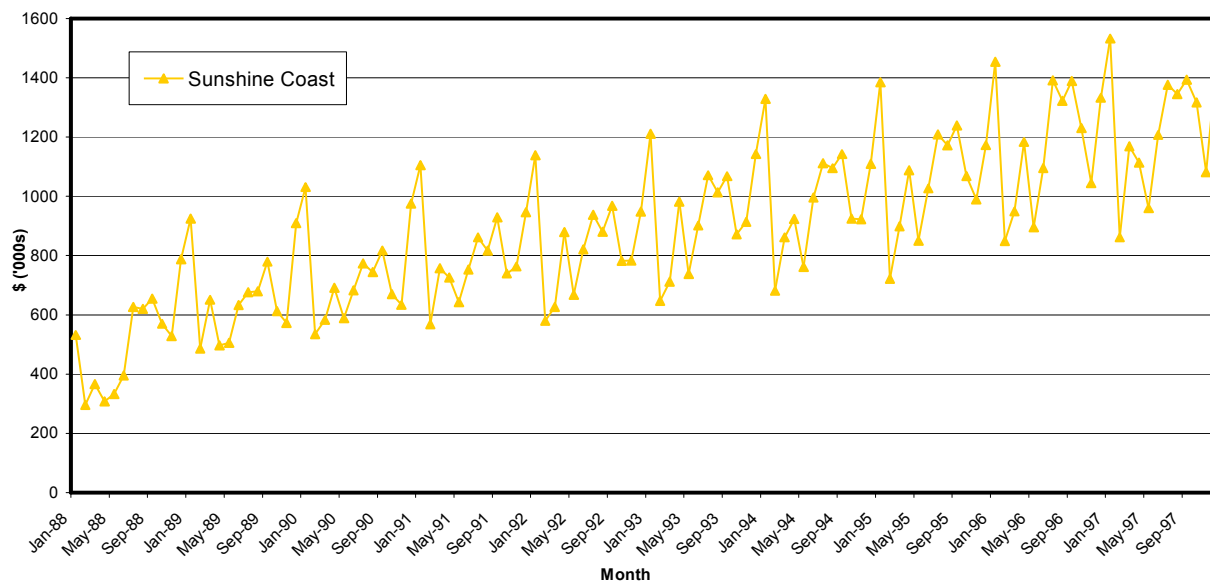


Figure 5.53 CPI Adjusted Monthly Takings from Sunshine Coast Caravan Parks.
(Monthly: 1988 – 1997)
(Calculated From: ABS 8635.3 Tourist Accommodation and 6401.1 CPI)

The seasonality pattern for takings by caravan parks has been relatively consistent over the ten year period, with a peak for December/January and the Easter break and a twin peak for July to September. The variation for 1988 can be linked to Expo 88. This was the one year where the January takings were surpassed or matched by all months from July to December of that year. Compared to the seasonality in takings from hotels, motels, and guest houses from 1988, the main difference is the higher level of takings in October for the hotel, motel, and guest house sector, than for caravan parks, when compared to the other takings per month. Similar to the hotels, motels, and guest houses, and consistent with monthly occupancy rates for caravan parks, the takings from the month of August are also high despite being outside of school holidays.

As seen by the yearly takings (Figure 5.52) the long term trend (Lowess=0.333) in the level of takings from caravan parks has been growing (Figure 5.54). The boost for the second half of 1988 and the yearly rise for 1989 is evident, with the rate of increase lowering after these two years. The data points scattered around the trend line shows the slight widening in the range over the years.

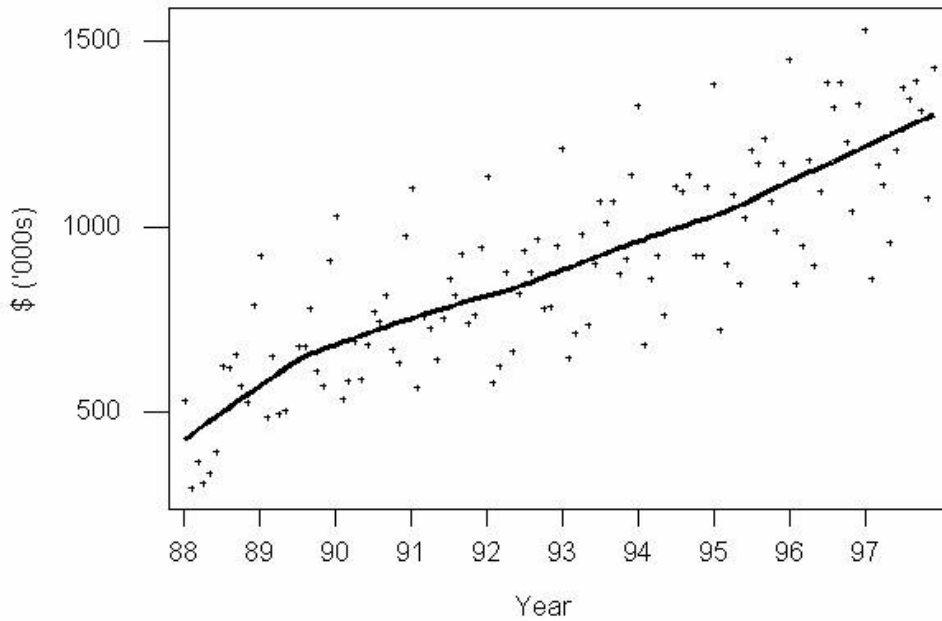
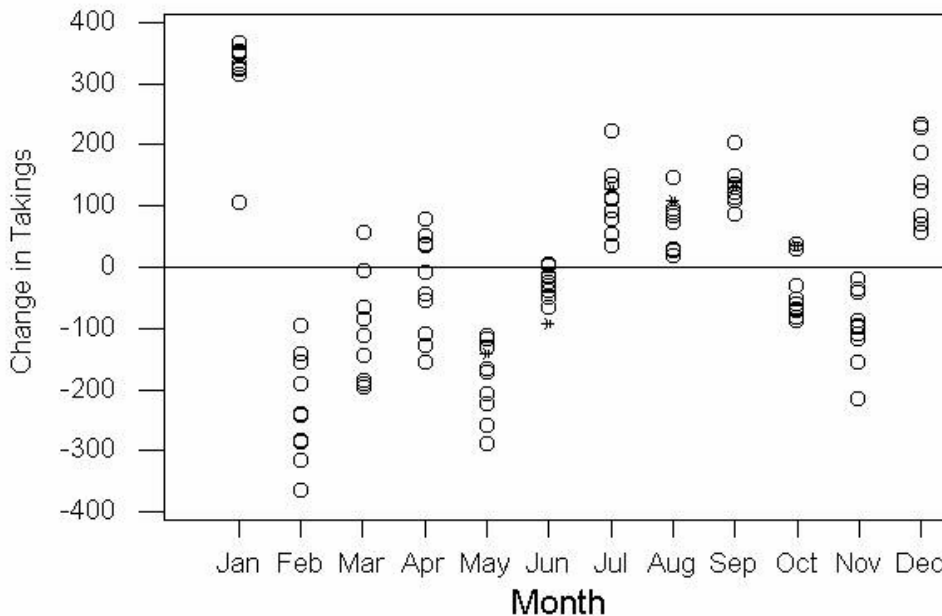


Figure 5.54 Long Term Trend in the Takings from Sunshine Coast Caravan Parks.
 (Calculated from: ABS 8635.3 Tourist Accommodation using a Lowess Scatter-Plot Smoother {Lowess = 0.333})

The level of takings for each month of the decade (Figure 5.55) shows the disparity between the months and the diversity within each month. The data points are plotted against the trend line to distinguish months that are above or below average.



* indicates Expo 88

Figure 5.55 Monthly Variation from the Trend in the Takings from Sunshine Coast Caravan Parks.
 (Calculated from: ABS 8635.3 Tourist Accommodation by de-trending the data {Lowess = 0.333})

As with occupancy, January is the month registering the highest level of takings in the caravan park sector. These January takings were further above the trend than all the other months in the decade, apart from the lower level of takings for January 1988. The end of 1988 and a number of months in 1989 were the highest takings values for those months, with respect to the long term trend. July to October 1996 also recorded high takings which were above the trend line, but November to May 1997 saw some of the lowest levels of takings in relation to the trend.

The monthly variation in takings corresponds with the pattern generated by the occupancy levels of caravan parks. The difference occurs in the range within certain months (Figure 5.41). For instance, with respect to the other months, January is rather condensed in the range of takings but widely spread for occupancy, outside of the 1988 low takings value. The reverse occurs for February and May, which are compact for occupancy but spread out for takings.

As with the occupancy levels of caravan parks (Figure 5.41) the values for takings during the months of Expo 88 (illustrated by the * in Figure 5.55) appear to exhibit a limited impact from the Expo. This small effect resulted in takings that were within the normal range for all months except June which actually recorded a slightly lower than usual level of takings.

5.4.3.4 Occupancy Rates on the Sunshine Coast

Data on tourism demand, provided by visitor numbers, illustrates part of the destination picture. One variable that is used to represent the relationship between this demand level required by the visitors, and the available supply of accommodation, is the occupancy level. The trend in the occupancy rate shows this relationship as it changes over time. The time-series data on occupancy rates for the Sunshine Coast region, as recorded by the ABS, are available for the accommodation sectors.

This monthly data on occupancy rates for the Sunshine Coast hotel, motel, and guest house sector, and the caravan park sector, has been presented and discussed in Section 5.4.2.2. To demonstrate the underlying trend of the fluctuating occupancy levels the raw data has been deseasonalise using a Lowess Scatter-Plot Smoother to show the overall occupancy trend.

Occupancy Levels in Hotels, Motels, and Guest Houses:

The long term trend (Lowess=0.333) in the occupancy level of Sunshine Coast hotels, motels, and guest houses (Figure 5.56) initially shows a gradual increase. After the initial slow rise the trend begins to decline in 1987. This fits with the beginning of the four-year expansion in the number of rooms available in the region, which commenced that year. At the end of the four-year growth period, the occupancy trend again begins a slow rise, which although reducing in gradient, continued to 1997.

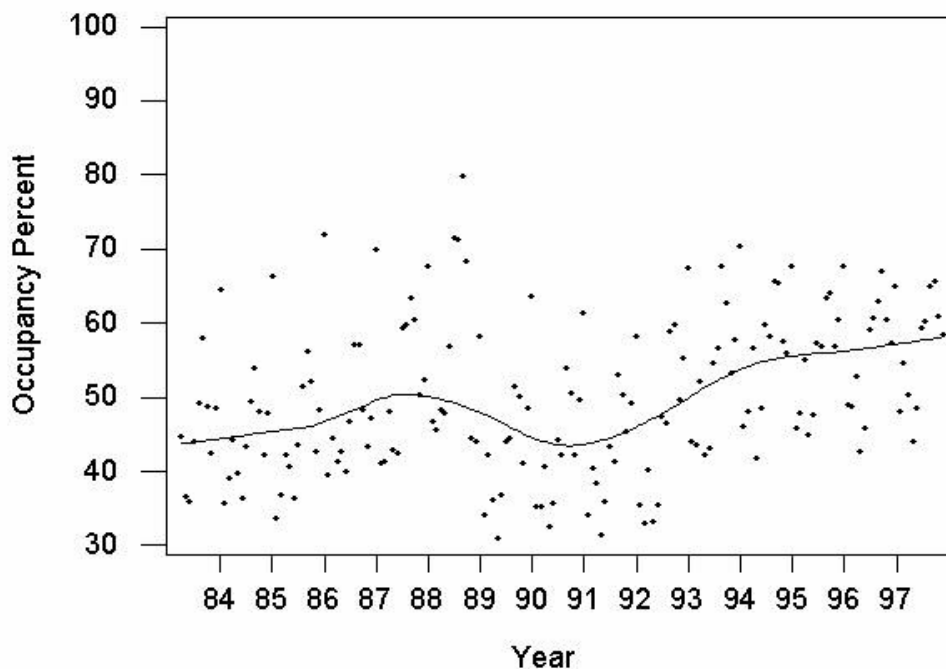


Figure 5.56 Long-Term Trend in the Room Occupancy Rate in Sunshine Coast Hotels, Motels, and Guest Houses.
(Calculated from: ABS 8635.3 Tourist Accommodation using a Lowess Scatter-Plot Smoother {Lowess = 0.333})

The changes in the pattern of occupancy in hotels, motels, and guest houses on the Sunshine Coast are not reflected in the pattern of yearly visitation. The data on the number of nights spent in commercial accommodation by the origin of the visitors (Figure 5.23) has a different pattern, with the total number of nights generally continuing to rise over the years from 1983 to 1997. Interestingly, the occupancy trend is closest to the pattern generated by the number of nights spent in the region by interstate visitors, with rising numbers to 1988/89, then decline until 1991/92, before a further increase through until 1997.

The fifteen years of data on the average monthly occupancy levels in hotels, motels, and guest houses on the Sunshine Coast has been separated into four different change periods. For each trajectory, a trend analysis was conducted using a time-series linear model. This analysis establishes the direction and extent of each period of change. These trajectories were plotted against the quarterly Sunshine Coast data (Figure 5.57). This process also identifies the three change points, where the current trajectory changes to a new trajectory that exhibits a different type of growth.

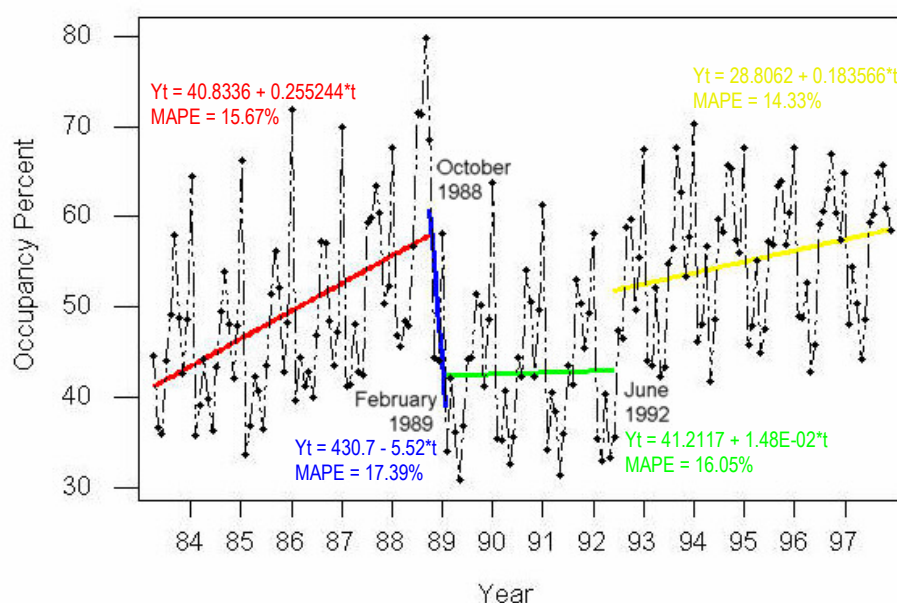


Figure 5.57 Trajectory Changes in Occupancy Levels in Sunshine Coast Hotels, Motels, and Guest Houses.
(Calculated from: ABS 8635.3 Tourist Accommodation using a Linear Trend Model)

The first growth trajectory extended from April 1983 to October 1988. Sunshine Coast occupancy in this accommodation sector was therefore rising throughout both the Recovery Period (1983-85) and the Tourism Boom (1986-88).

The growth period ended in October 1988, which was also the last month of Expo 88. This drop in occupancy also corresponds to the large jump in supply after the Hyatt Regency Cooloom opened in the second half of 1988, as discussed in Section 5.3.1.2 (Figure 5.9). As shown in Section 5.4.1.1, the rise in visitation to the Sunshine Coast, although fluctuating, was generally an increasing trajectory (Figure 5.21). Therefore, a drop in occupancy would be expected after a step up in the number of rooms available.

Theoretically, the reduction in occupancy would gradually ease as the level of visitor demand for accommodation catches up to the over supply of rooms. However on the Sunshine Coast the occupancy trend for the hotel, motel, and guest house sector did not rise until 1992. This third trajectory, from February 1989 to June 1992, was basically a period of equilibrium, with the monthly occupancies fluctuating around a relatively constant occupancy rate.

The occupancy trend therefore did not begin to rise after the drop for 1988, despite increasing visitation. However during this period the supply of accommodation also continued to rise, with the opening of various hotels, motels, and guest houses, including the Sheraton Noosa and Twin Waters Resorts (Figure 5.9). This increasing trajectory for the supply of rooms continued until December 1990 (Figure 5.10).

It was not for another 18 months that the increasing visitation demand caught up to the supply of rooms, beginning a new growth trajectory for occupancy. This trajectory extended from June 1992 to the end of the data set in December 1997, thereby extending from the Recovery Period (1992-94) through the Unstable Period (1995-97). However this growth trajectory was not as marked as the first trajectory of the Tourism Boom.

Occupancy Levels in Caravan Parks:

The lowest monthly occupancy level for caravan parks (Figure 5.40) during the decade from 1988, was 37.5 percent recorded in February 1988. February is normally a low occupancy month (Figure 5.41), but this was recorded before the significant increase in the number of caravan parks occurred in second half of 1988. Such an increase in both the number of parks and the total number of sites in the region could have resulted in lower average occupancy from mid 1988 onward. The long-term trend line does not however show any significant reduction in occupancy at this time (Figure 5.58).

This long-term trend line was determined by removing the seasonality from the data (Lowess=0.333). This produced a relatively flat trend in the occupancy level of the caravan parks on the Sunshine Coast (Figure 5.58). After nearly four years of operating at an average occupancy of around 50 percent, a gradual increase occurred over the subsequent three years to mid 1994, when the trend began to decrease slightly for two years and then began to climb slowly again. Part of the reason for the low level of overall positive change

in the long-term occupancy trend in caravan parks may be attributed to the slowly reducing capacity of the caravan parks on the Sunshine Coast.

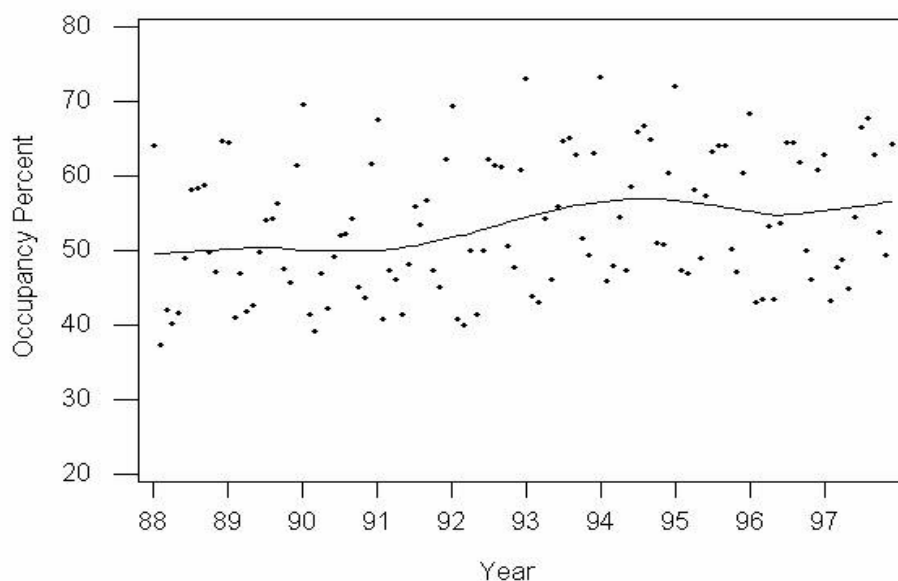


Figure 5.58 Long-Term Trend in the Site Occupancy Rate in Sunshine Coast Caravan Parks.
(Calculated from: ABS 8635.3 Tourist Accommodation using a Lowess Scatter-Plot Smoother {Lowess = 0.333})

5.4.3.5 Addressing Research Sub-Issue Three - Other Variables

This sub-section has analysed Sunshine Coast data on the length of stay by visitors, yearly visitor expenditure levels, takings from accommodation providers, and the long-term trend in occupancy levels for different accommodation sectors. The patterns generated by these data variables, while determined by the activities of visitors, are different to the overall pattern of visitation. Therefore, the measure of total visitor numbers alone does not illustrate the changing patterns and trends within visitation. This supports the third research sub-issue.

5.4.4 Addressing Research Issue Two - Visitor Numbers

The analysis of the different types of visitor sub-categories has reinforced that total visitor numbers is an aggregation of all types of tourists. As an overall measure of tourism change, this measurement fails to illustrate the extensive variation in patterns that exist within sub-

classifications. Yearly data also obscures the impact of seasonality of tourism-related variables. In addition, a measure of total visitor numbers alone does not illustrate changing patterns that cannot be determined by visitor numbers alone. This supports the second research issue, that tourism change cannot be explained by total yearly visitor numbers alone.

5.5 Research Issue Three - No Predetermined Pattern

The third Research Issue states that: **there is no predetermined pattern of tourism destination change**. Unlike the Destination Life-Cycle with its sequential stages, the Multi-Trajectory Model of Tourism Destination Change proposes that at any point in its life, a destination may 'change' to follow any one of the trajectory options. Different tourism related variables may exhibit very different patterns. This does not imply that all time-series data will not illustrate corresponding trajectories or change points.

The outcome of this proposition is that the pattern of change in a tourism-related data variable can exhibit any one of the five trajectories followed by a change to one of the other four. This process can then be repeated over and over. The pattern of each data variable over time would therefore be a combination of up to the five different trajectories occurring in any order.

Within this Research Issue there are three Sub-Issues which relate to the pattern of change in destination data variables as proposed in the Multi-Trajectory Model of Tourism Destination Change (Figure 5.59). The first Sub-Issue states that tourism-related data variables exhibit different patterns over time, the second Sub-Issue relates to the lack of order in stage progression, and the third Sub-Issue considers the unspecified duration of a stage or trajectory. The remainder of this section will address each of these Sub-Issues in turn, thereby demonstrating that tourism destination change does not follow one predetermined pattern.

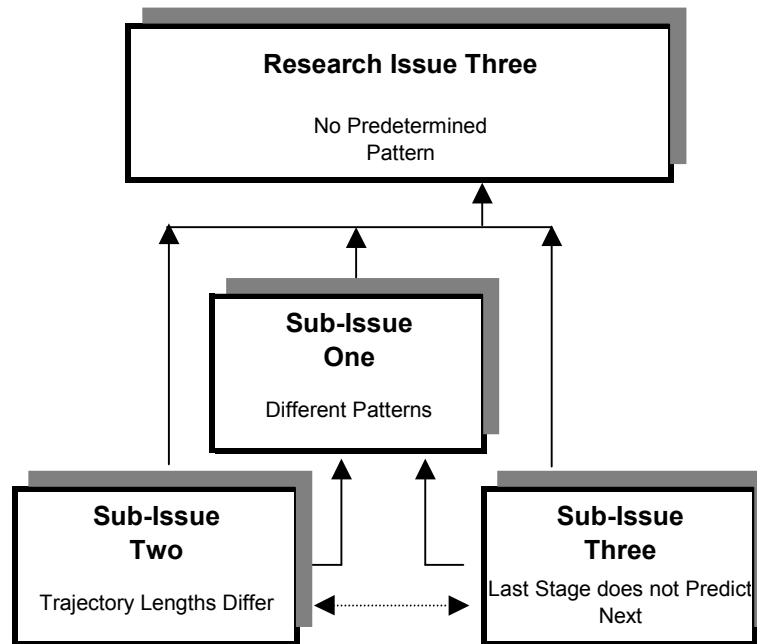


Figure 5.59 The Three Sub-Issues of Research Issue Three.
(reproduced from Figure 5.1)

5.5.1 Sub-Issue One - Different Patterns

The first Sub-Issue states that: **tourism-related data variables exhibit different patterns**. If there is no predetermined pattern, then tourism-related data variables will exhibit different patterns over time.

This has already been seen in the figures used to substantiate the first two Research Issues, as varying patterns were found when analysing different geographical scales, sub-categories of data variables, seasonal data, and a range of different variables.

With respect to the Multi-Trajectory Model of Tourism Destination Change, the pattern of a tourism-related data variable may not exhibit all five trajectory options during a particular time period. The pattern of a variable may be a single trajectory or a combination of a number of trajectories, as discussed in Chapter Two (Section 2.7.1.3).

Different tourism-related variables can exhibit very different patterns during the same time frame. Therefore the pattern of change displayed by a tourism destination is ultimately dependant on the variable(s) considered. As shown in the discussion of the first Sub-Issue in Research Issue Two on Visitor Sub-Categories (Section 5.4.1), an aggregate increase in visitation may be due to a rise in one market combined with a fall in another. Focusing on total visitor numbers can therefore portray a different type of growth to the analysis of visitors from intrastate, interstate, or overseas; or the analysis of the type of accommodation used.

However, this does not imply that all tourism-related time-series data will not illustrate any corresponding trajectories or change points. For instance there is an obvious relationship between the number of establishments and the capacity in an accommodation sector. This resulted in very similar patterns for the two data variables in the hotel, motel, and guest house sector for the Caloundra Shire (Figure 5.4 and Figure 5.11) as no large resorts were built during the time period analysed.

Even within one sector of a destination, different patterns of change are exhibited. As determined in Chapter Four this section will analyse, compare, and discuss the various patterns shown by data variables related to the hotel, motel, and guest house sector. This section presents the different patterns of change, highlighting the relationships between these accommodation-related variables. This data has been provided in the previous sections, but to allow for a more direct comparison of these patterns, the variables have been transformed to produce the percentage change in each variable from the base year of 1983/84, thereby utilising the same measure and scale.

5.5.1.1 Overview of the Hotel, Motel, and Guest House Sector

This accommodation sector incorporates the two forces of demand and supply. Demand for accommodation by tourists is illustrated by data on the number of visitors staying in commercial accommodation on the Sunshine Coast. The supply of accommodation is presented through the use of data on the changing number of establishments, the total number of rooms available and the relationship between these variables, the average number of rooms per establishment. The combination of the forces of supply and demand results in the recorded levels of occupancy data within this sector.

In addition to these supply and demand related variables, this analysis also considers the patterns shown by financial data, the average expenditure on accommodation by the visitors, and the takings received by this accommodation sector, as a yearly total, and as an average level of takings per available room.

There has been significant variation in the percentage change since 1983/84 for these eight variables. One variable increased by over 1400 percent, two by around 600 percent and the other five by less than 150 percent. As a result all the variables are presented together (Figure 5.60), and secondly, the five variables with the lower level of change are displayed (Figure 5.61).

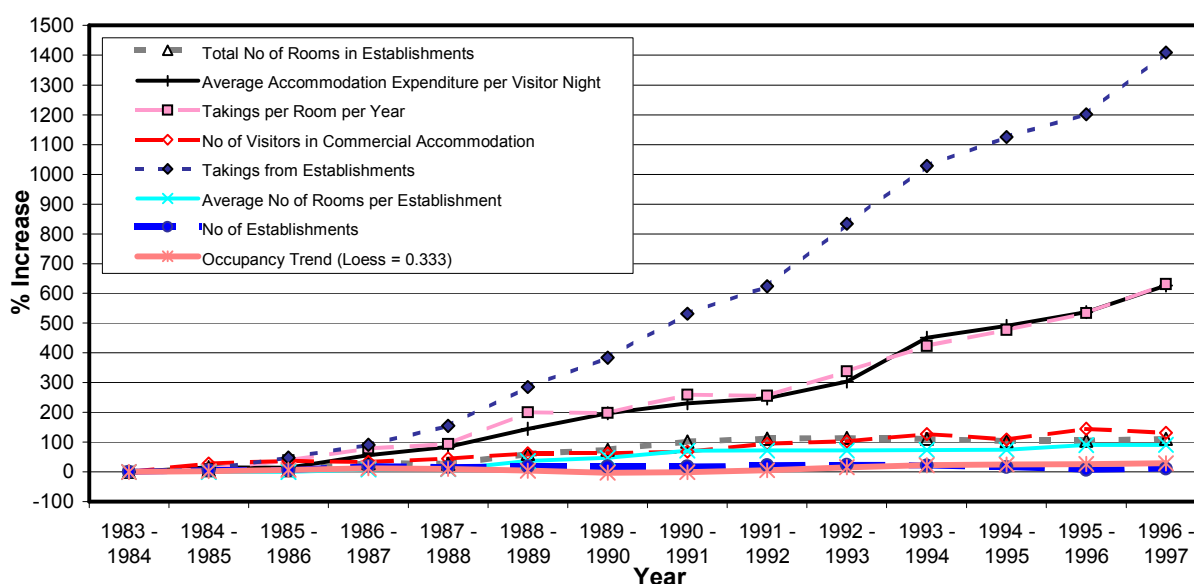


Figure 5.60 Sunshine Coast Hotel, Motel, and Guest House Sector – Percentage Change from 1983/84 to 1500%. (1983/84 – 1996/97)
(Calculated From: QTTC/TQ – Major Survey Research Programme and Queensland Visitor Survey, and ABS 8635.3 Tourist Accommodation and 6401.1 CPI)

Over this fourteen year period all eight variables increased by some margin. The major percentage increase since 1983/84 occurred in the level of takings by the hotel, motel, and guest house sector, which increased by 1400 percent on a CPI adjusted basis. This total yearly level of takings rose every year despite fluctuating visitor numbers, changing occupancies, and varying numbers of providers and capacities.

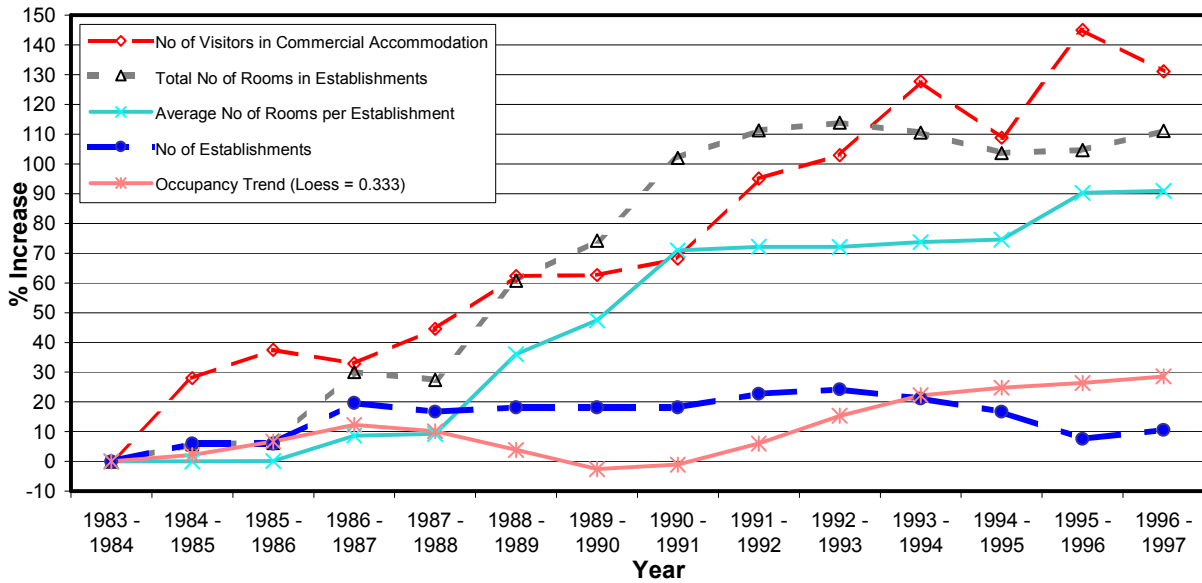


Figure 5.61 Sunshine Coast Hotel, Motel, and Guest House Sector – Percentage Change from 1983/84 to 150%. (1983/84 – 1996/97) (Calculated From: QTTC/TQ – Major Survey Research Programme and Queensland Visitor Survey, and ABS 8635.3 Tourist Accommodation and 6401.1 CPI, Aust)

As a result, the level of takings per room also increased substantially, rising by over 600 percent. This growth was paralleled by the data on the average expenditure on accommodation per visitor night. This relationship will be explored further in Section 5.5.1.4.

The other five accommodation-related variables increased by less than 150 percent in this fourteen year period (Figure 5.61). Increasing between 90 percent and 130 percent were the average number of rooms per establishment, the total number of rooms available, and the number of visitors staying in commercial accommodation. Over this period the number of establishments and occupancy trend rose by approximately 10 percent and 30 percent respectively.

5.5.1.2 Occupancy

Unlike the other data variables, which measure people, dollars, and rooms, the occupancy level is constrained to 100 percent. As the initial 1983/84 occupancy level was already in the low 40 percents the highest growth rate possible would have been 130 percent and this

would have required all the hotels, motels, and guest houses to have all their rooms occupied for every night of every month. Given this context, the increase in the trend in occupancy (Lowess=0.333) of almost 30 percent was notable but not outstanding. The change in the type of occupancy after 1992 was more significant. This occupancy trajectory, as discussed in Section 5.4.2.2, showed seven continuous months per year recording occupancy rates over 55 percent, combined with the low season monthly occupancies remaining above 40 percent (Figure 5.38).

5.5.1.3 Visitor Numbers and Total Rooms

Section 5.4.1.1 showed that the total number of visitor nights within the Sunshine Coast doubled between 1985 and 1997. In correlation with this increase in demand (Figure 5.21), the supply of rooms in hotels, motels, and guest houses also doubled (Figure 5.7). However, this doubling of supply and demand occurred on different time frames within this twelve-year period. The duration of the primary growth in hotel rooms was the four years from 1987 to 1990, with two times the 1985 level of rooms reached by the end of this expansion. From then on, the supply of rooms has remained relatively constant. In comparison the demand for visitor nights required a decade of fluctuating growth to double in number, with the trend for visitor nights that of a gradually increasing trajectory over the twelve years.

The increase in visitor numbers can therefore be seen to have occurred more gradually than the addition of extra rooms in the hotel, motel, and guest house sector. The percentage change from 1983/84 for these two variables (Figure 5.62) shows the general positive climb in visitor numbers over the whole period, with the growth in the number of rooms occurring over the shorter time frame.

By considering the percentage changes since 1983/84 it can be seen that the number of visitors utilising commercial accommodation increased by a larger percentage than any of the other seven hotel-related variables presented for the first year (Figure 5.60 and Figure 5.61). The same level of growth in the total number of rooms was reached two years later in 1986/87. The number of visitors then grew at a faster rate until 1988/89 when the room supply had again increased by the same percentage as the number of visitors. The increase in room supply continued its development trajectory, thereby increasing at a higher rate than that demonstrated by the visitors. At the end of 1990/91, when there had been a 100 percent

increase of the number of rooms since 1983/84, this growth trajectory for the development of rooms changed to begin a period of relative equilibrium. Three years later the level of visitors utilising commercial accommodation had again increased above the supply percentage increase, indicating the possible requirement of a corresponding increase in the supply of rooms in hotels, motels, and guest houses.

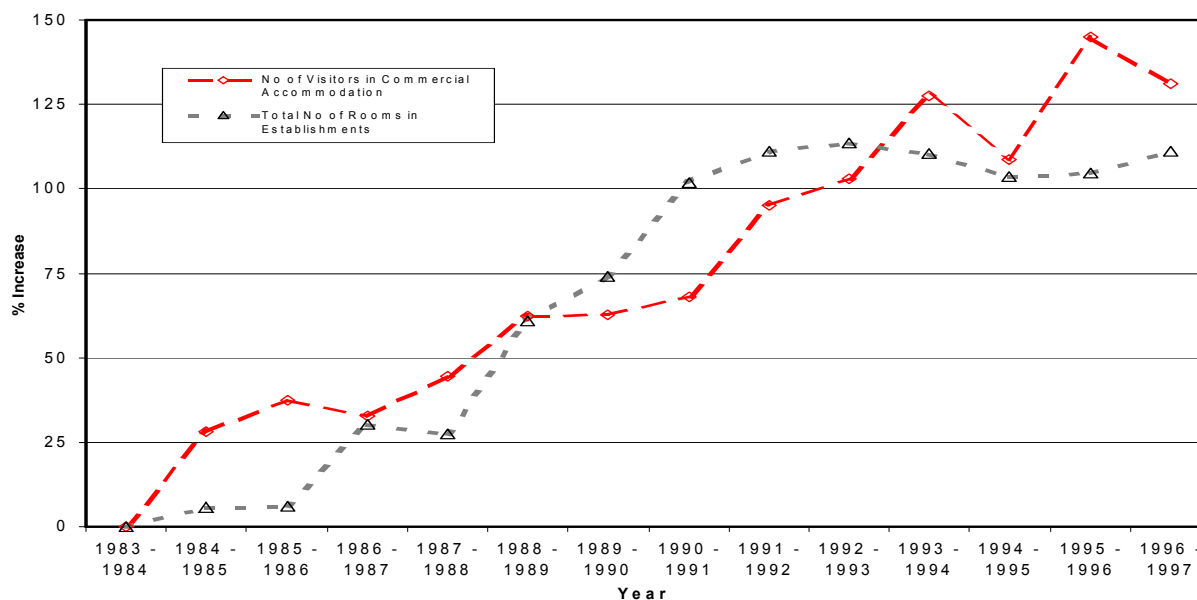


Figure 5.62 Comparison of the Number of Visitors using Commercial Accommodation and the Total Number of Rooms in Hotels, Motels, and Guest Houses for the Sunshine Coast – Percentage Change from 1983/84. (1983/84 – 1996/97)
(Calculated From: QTTC/TQ – Major Survey Research Programme and Queensland Visitor Survey, and ABS 8635.3 Tourist Accommodation)

The patterns displayed by these two variables show that even when different variables increase by a similar amount over a specified time frame, there can still be different growth trajectories occurring. In this case, the visitor numbers increased along a gradually increasing evolutionary trajectory, while over the same period room numbers exhibited an equilibrium, positive growth, equilibrium pattern.

5.5.1.4 Takings and Expenditure on Accommodation

There is a match between the patterns of change of the average takings per room per year and the average expenditure on accommodation per visitor night. The match occurs both in the pattern of growth and the value of the percentage change from the base year (Figure 5.63).

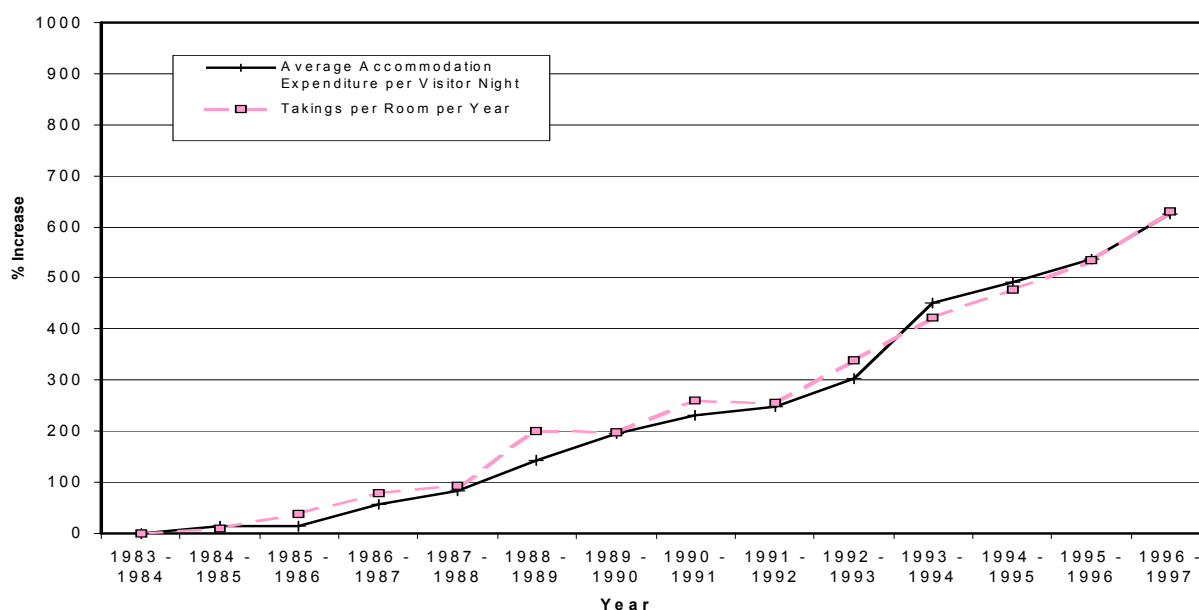


Figure 5.63 Comparison of the Average Expenditure on Accommodation per Visitor Night and the Takings per Room per Year from Hotels, Motels, and Guest Houses for the Sunshine Coast – Percentage Change from 1983/84. (1983/84 – 1996/97)
 (Calculated From: QTTC/TQ – Major Survey Research Programme and Queensland Visitor Survey, and ABS 8635.3 Tourist Accommodation and 6401.1 CPI)

The patterns of growth for these two variables may have been expected to be similar as they both aim to measure the amount paid or received for accommodation. However, the primary data was collected by separate Government bodies, administering different surveys, with one questioning the visitor with respect to their spending in the region, while the other collected data on the revenue received by the accommodation providers. It would therefore be expected that the variables could differ, due to the different methodologies used, the effects of sampling, the reliability of the respondents answers, and the amalgamation of all accommodation types into the visitor expenditure survey.

Despite this, these two variables increased together over the thirteen years, reaching over 600 percent by the end of 1996/97. The main deviation between the two data sets occurred in 1988/89, which included Expo 88, when the growth in the average takings per room was higher than the recorded rise in the average expenditure on accommodation.

This fit between the percentage changes in takings per room in the hotel, motel, and guest house sector, and expenditure on accommodation is statistically robust. The correlation coefficient between these variables is $r = +0.995$, indicating a very strong positive linear relationship (Figure 5.64).

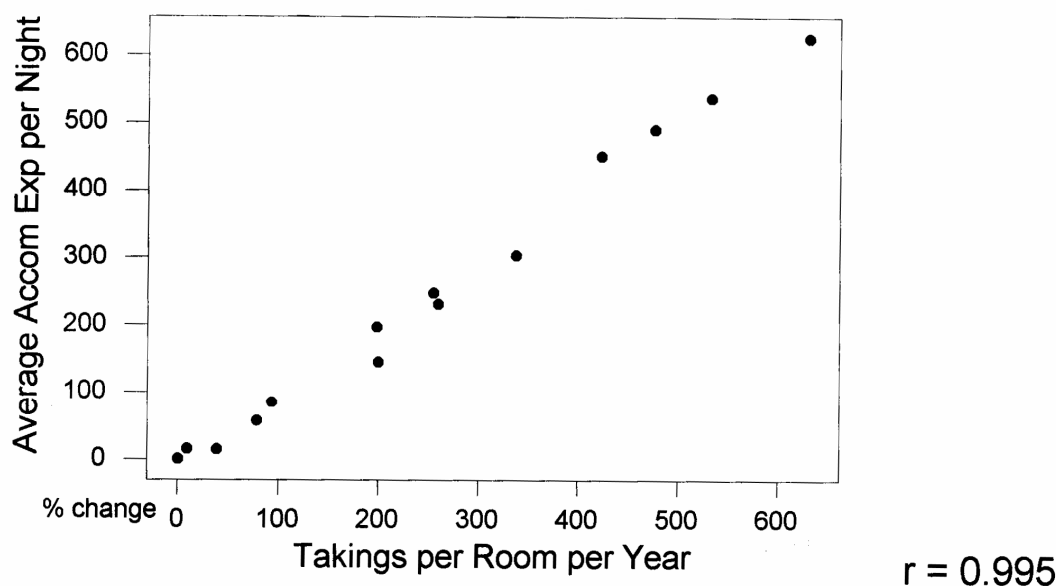


Figure 5.64 Scatterplot of the Correlation between Percentage Change from 1983/84 in the Average Expenditure on Accommodation per Visitor Night, and the Takings per Room per Year from Hotels, Motels, and Guest Houses for the Sunshine Coast. (Calculated From: QTTC/TQ – Major Survey Research Programme and Queensland Visitor Survey, and ABS 8635.3 Tourist Accommodation and 6401.1 CPI)

5.5.1.5 Visitor Numbers, Total Rooms, Occupancy and Takings

A comparison of the different patterns of the percentage change in the eight variables was conducted to determine whether additional relationships between the variables occurred. When comparing the relationship between the growth patterns from 1983/84 for number of visitors, total rooms available, and takings received per room (Figure 5.65), only one consistent relationship could be found. It can be seen that when the growth in visitors using commercial accommodation was equal or higher than the increase in the number of rooms, the level of takings per room always grew.

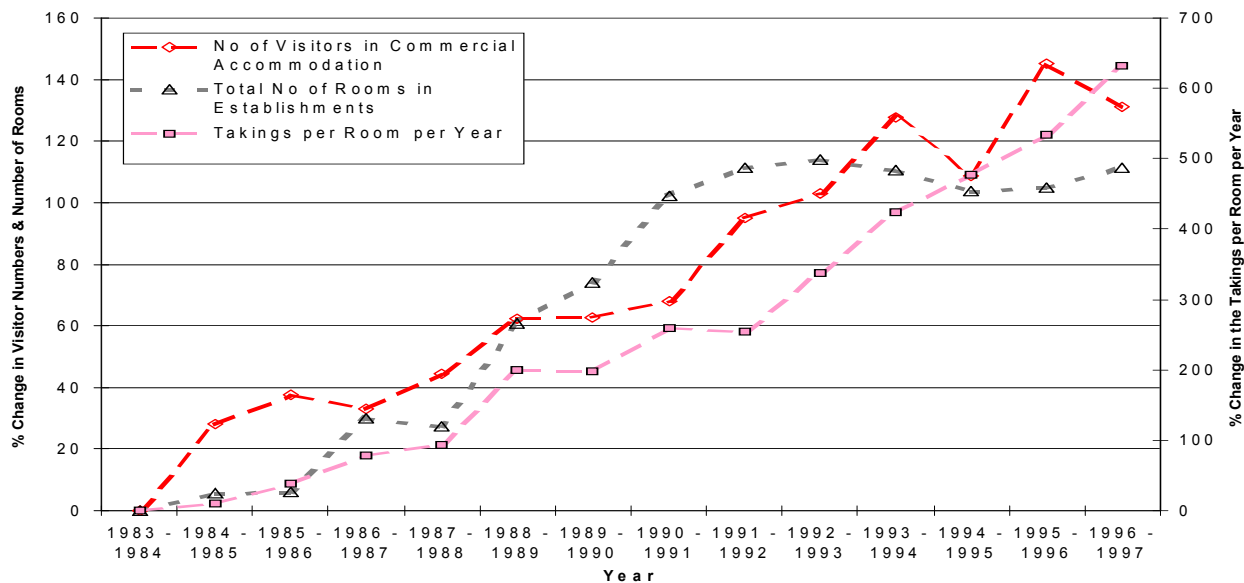


Figure 5.65 Comparison of the Number of Visitors, Total Number of Rooms, and Takings per Room per Year from Hotels, Motels, and Guest Houses for the Sunshine Coast – Percentage Change from 1983/84. (1983/84 – 1996/97)
(Calculated From: QTTC/TQ – Major Survey Research Programme and Queensland Visitor Survey, and ABS 8635.3 Tourist Accommodation and 6401.1 CPI)

5.5.1.6 Addressing Research Sub-Issue One - Different Patterns

Overall there are very different patterns of growth from 1983/84 for the eight accommodation related variables. Although all variables experienced some growth over the thirteen years, there was significant variation in the type, extent, and timing of the growth.

In the variables analysed there were only a limited number of identifiable relationships between the variables. Firstly, the growth in the number of visitors and the number of available rooms fluctuated around each other. However the two patterns differed, with the visitors number variable increasing along a gradually increasing evolutionary trajectory, while room numbers followed an equilibrium, positive growth, equilibrium pattern. Secondly, the value of accommodation takings and the visitor expenditure on accommodation matched. Despite the different methodological approaches these two variables measure a similar phenomenon and therefore such a relationship is not unexpected.

Apart from these two relationships there was little correlation between the patterns of change in these accommodation related variables. In addition to demonstrating that different patterns occur in tourism-related variables, this also highlights the complexity that exists within a tourism destination, as variables do not appear to change in a set pattern with respect to other variables.

The variety in the change patterns within this destination, along with the level of complexity in the relations between the variables, would be increased if other accommodation sectors or non-accommodation variables were added to the discussion. A single pattern is therefore not representative of the complex arrangement of rising and falling aspects of a tourism destination as it changes over time. This supports the first Sub-Issue, that tourism-related data variables exhibit different patterns.

5.5.2 Sub-Issue Two - Trajectory Lengths Differ

The second Sub-Issue states that: **the current trajectory does not have a predetermined life**. Demonstration that one trajectory option does not last for a preset period of time would illustrate that there is no set pattern for tourism destination development. The internal and external forces operating on a specific tourism destination system are different to both other destination systems and the past forces that acted upon the destination. This results in a lack of order in stage progression, and instead, an individualised length for each trajectory.

5.5.2.1 The Boom and Bust Periods

As determined in Chapter Four, a six year time frame was selected to establish whether one trajectory has a predetermined duration. These two three year periods, the 'Tourism Boom' and 'The Recession' were discussed in the previous chapter. If there was a preset ending to a trajectory, this situation would be expected to show a growth trajectory followed by a declining trajectory across various tourism-related variables.

The boom years occurred from 1986 to 1988, as the potential economic benefits of tourism were realised and big business invested with the support of Government. This phase was followed by the recession period of 1989 to 1991, which incorporated the post-Expo lull, the Pilot's Dispute, airline deregulation, the Nationwide economic recession, and the Gulf War.

The eight Sunshine Coast variables analysed in this section have been presented and discussed in the previous Research Issues. The focus in this section is on the trajectories evident for the different variables during the boom and bust years. To permit a more direct comparison of the pattern of trajectory change, the variables have been transformed to produce the percentage change in each variable from the base year of 1985, thereby utilising the same measure and scale for all variables.

The six years of data for each variable, as the percentage change from 1985, has been separated into its different change periods, through a process of inspection. For each trajectory, a trend analysis was conducted using a time-series model. The majority of trajectories were determined by the application of a linear model. However, certain change patterns required analysis using a polynomial model, as the growth occurred at an increasing rate. The analysis of the data also established the direction and duration of each period of change. This process also identified the change points, where one trajectory changes to another.

It is important to note that the data could generate different trajectories if the time period was changed. Inspection of a longer or shorter pattern of data may generate alternate trajectories and change points. For example, in this six year analysis a drop for 1990 followed by a rise for 1991, may be two separate trajectories, or one, depending on the percentage change recorded for 1992.

There has been significant variation in the percentage change since 1985 for the eight variables. One variable increased by almost 450 percent, another by around 350 percent, and the other six by less than 100 percent. As a result the two high growth variables are presented together (Figure 5.66), and secondly, the five variables with the lower level of change are displayed (Figure 5.67). These figures show the percentage change in the actual data values for each of the variables analysed.

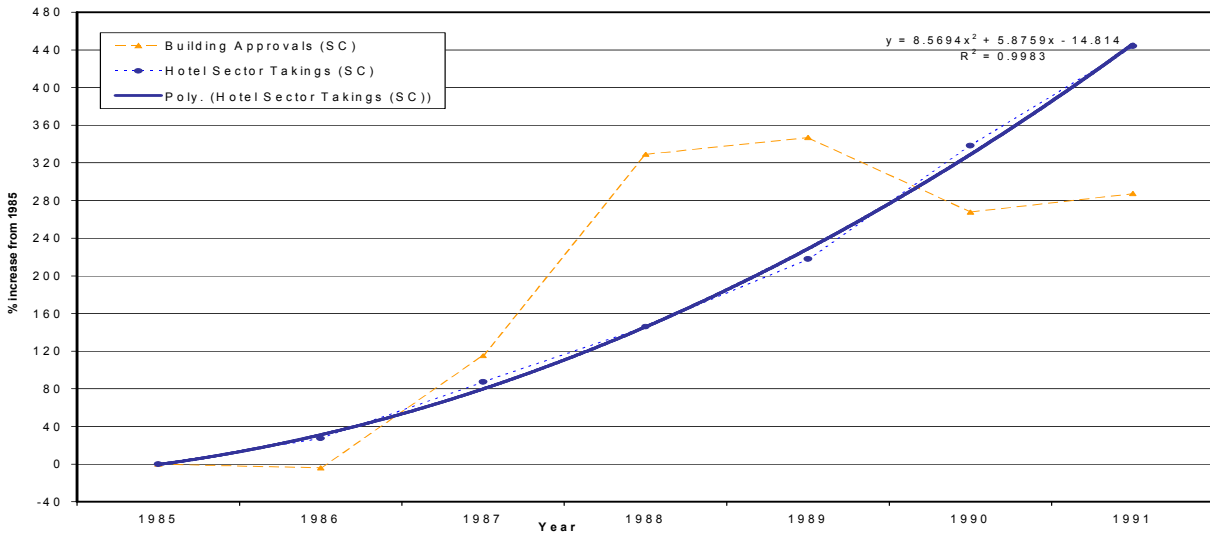


Figure 5.66 Sunshine Coast Tourism Boom and the Recession – Percentage Change from 1985 to 500%. (1986 – 1991)
 (Calculated From: QTTC/TQ – Major Survey Research Programme and Queensland Visitor Survey, and ABS 8635.3 Tourist Accommodation and 6401.1 CPI)

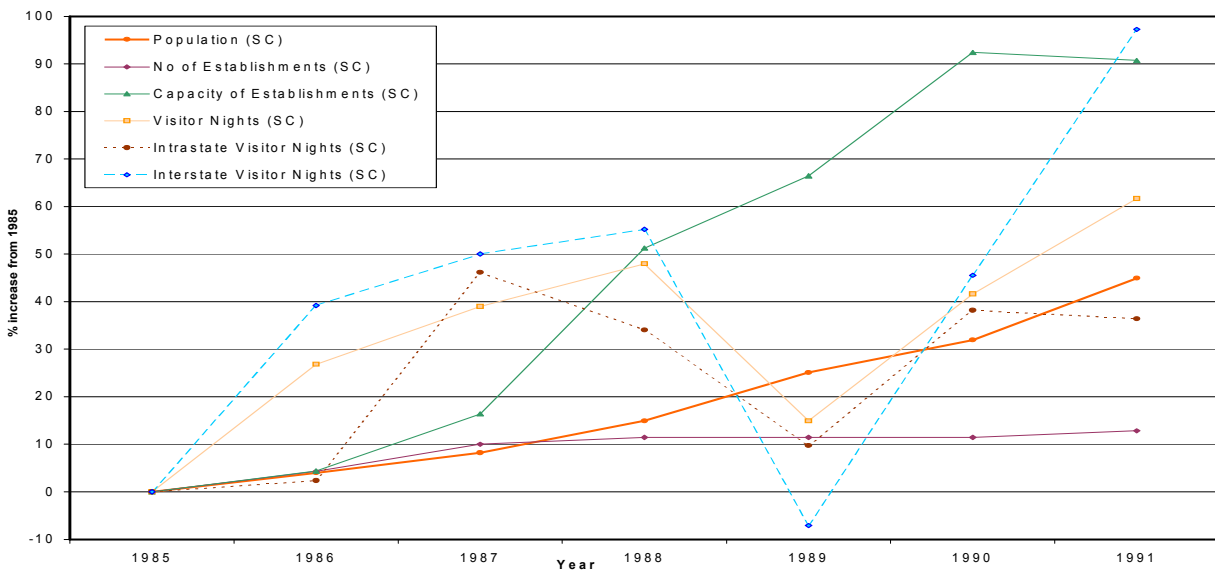
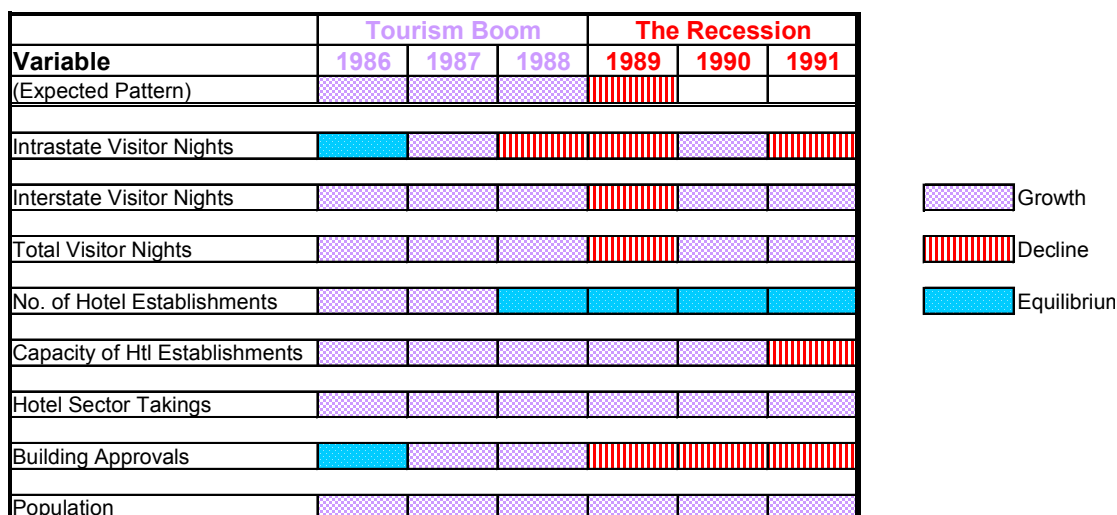


Figure 5.67 Sunshine Coast Tourism Boom and the Recession – Percentage Change from 1985 to 100%. (1986 – 1991)
 (Calculated From: QTTC/TQ – Major Survey Research Programme and Queensland Visitor Survey, and ABS 8635.3 Tourist Accommodation and 6401.1 CPI)

The trajectories have also been separated into the three categories of growth, decline, and equilibrium, and are displayed for each year for each variable (Table 5.1). The growth period encompasses high or low growth, or growth that is increasing at an increasing rate.

This allows for a comparison to be made between the variables, as it clearly shows which variables were experiencing the same type of trajectory in the same year and when the variables changed to a different trajectory, if at all.

Table 5.1 Trajectories Displayed by Various Tourism and Growth Variables for the Sunshine Coast During the Six Year Boom and Bust period.



If there was a preset ending to a trajectory, analysis of the data variables over the six year boom and bust period would be expected to show a growth trajectory followed by a declining trajectory across various tourism-related variables. This proposition can be separated into a number of sub-propositions. These relate to the type of trajectories experienced during the boom and bust periods, changes in trajectories, and the timing of such changes. The sub-propositions generated seven questions that have been analysed for each variable (Table 5.2). The remainder of the section will address each of these questions in turn.

Table 5.2 Questions for the Analysis of the Trajectory Changes in the Boom and Bust Period.

Boom and Bust Period	
Question One	Did the variables increase during at least one of the boom years?
Question Two	Were the variables increasing at the beginning of the boom period?
Question Three	Did the variables continue to increase through the boom years?
Question Four	Did the variables decline at the end of the boom years i.e. in 1989?
Question Five	Did any of the variables drop later in 'The Recession'?
Question Six	Did any of the variables continually decrease during 'The Recession'?
Question Seven	Did any variable(s) not decrease during 'The Recession'?

5.5.2.2 Did the variables increase during at least one of the boom years?

This question addresses whether the ‘Tourism Boom’ positively affected all the variables analysed. This examines whether the overall condition affected all the variables considered.

All the variables analysed experienced growth for at least one year of the boom period. However, the patterns varied and the years when the growth occurred differ across the variables.

5.5.2.3 Were the variables increasing at the beginning of the boom period?

This question addresses whether all the variables analysed were already showing the positive effects at the beginning of the boom period. This also highlights any variables which had a late start to the growth period.

The majority of these variables were experiencing a growth trajectory for 1986. However intrastate visitor nights and total building approvals did not increase significantly for 1986 and were therefore experiencing equilibrium trajectories. Both these variables began to increase the following year, therefore illustrating delayed growth.

5.5.2.4 Did the variables continue to increase through the boom years?

This question addresses whether there were any variables that showed an early end to the growth period, thereby exhibiting a shorter growth trajectory.

The majority of variables demonstrated growth trajectories which continued until the end of the boom period. The exceptions were intrastate visitor nights and the number of establishments. Intrastate visitor nights had only one year of growth, which occurred in the middle of the boom period. Therefore, in addition to a late start to the growth period, intrastate visitor nights also experienced an early end to growth. The pattern for the number of establishments differed. Although this variable also experienced an early end to the boom period, the number of establishments had increased for the first few years, reaching an equilibrium trajectory by 1988.

5.5.2.5 Did the variables decline at the end of the boom years, i.e. in 1989?

This question addresses whether all the variables decreased together after the completion of the boom, or whether some variables were not immediately affected by the negative external impacts.

Less than half the variables ended their growth period in 1989, at the end of the boom period. Those that did included total visitors nights, interstate visitors nights, and building approvals. Total visitor nights and interstate visitation both displayed the same overall pattern during this six year period, although the total visitor nights were not as extreme in either the increases or decreases, as interstate visitation. This is due to the effects of smoothing at the aggregate level, as discussed in Sub-Issue One of the second Research Issue. Total visitor nights and interstate visitor nights both illustrate three years of growth during the boom period, followed by decline for 1989. These were the only two variables to fit the 'expected pattern'. The other variable which began to decline at the end of the boom period was building approvals, which had a late start to the growth period.

5.5.2.6 Did any of the variables drop later in 'The Recession'?

This question addresses whether some variables showed a late end to growth period, thereby exhibiting a longer growth trajectory.

Only one variable experienced a late change from growth to decline. This was the capacity of establishments which experienced five years of growth before the decline in 1991, the last year of the recession period. There are a number of factors which could have affected the ongoing increase in accommodation capacity despite the downturn in demand. As discussed in Chapter Four, these factors include the building of accommodation in line with building activity rather than the demand trend exhibited; the length of time for planning, approval, commencement and opening of developments; and the level of optimism that surrounded tourism business activity in the mid 1980s.

5.5.2.7 Did any of the variables continually decrease during ‘The Recession’?

This question addresses whether there were any variables that declined over the three years of ‘The Recession’ period, or whether certain variables showed an early end to the decline period, thereby exhibiting a shorter negative trajectory.

The only variable which exhibited a declining trajectory which extended over the three year recession period was building approvals. All the other variables displayed different patterns, as shown in Table 5.1.

In fact only three other variables experienced a decline during the initial year of the recession period. These were the three categories of visitor nights – total, intrastate, interstate, and they all increased again for 1990. In the case of total and interstate visitor nights, the increase continued, with the number of nights in 1991 greater than the boom years. In contrast intrastate visitor nights began to decline again in 1991.

5.5.2.8 Did any variable(s) not decrease during ‘The Recession’?

This question addresses whether ‘The Recession’ negatively affected all the variables analysed. This examines whether the overall condition affected all the variables considered.

Two variables continued to grow despite the recession period. These were population and takings from the hotel sector. These variables both increased at an increasing rate over the entire six year period. Therefore the recession did not halt the rising population growth in this region. The continual increase in takings in the hotel sector throughout the boom and the recession periods illustrates that despite fluctuations in visitation and occupancy, and major events, such as Expo 88 and the Pilot’s Dispute, the yield continued to increase at an increasing rate.

Another variable did not recede with the recession. The number of establishments in the hotel sector began an equilibrium trajectory in 1988. This trajectory continued into and throughout the recession years.

5.5.2.9 Addressing Sub-Issue Two - Trajectory Lengths Differ

The analysis of the trajectories experienced by these variables during the boom and bust shows that the different variables have responded to the internal and external forces operating on the Sunshine Coast destination in varying ways.

The responses for the seven questions for each variable (Table 5.3) shows that the total visitor numbers and interstate visitor numbers followed the same pattern. These two variables were also the only two that exhibited the expected pattern, of growth through the boom years and a decline for the beginning of the recession. The other variables did not decline, or declined earlier or later, or had not experienced growth for the boom years. This clearly shows the complexity of the change that occurs in tourism-related variables.

The same responses to the seven questions also occurred for the level of takings and population growth, as these two variables recorded growth for the entire period despite all the changes. All the other variables responded to the boom and bust period in different ways.

Table 5.3 Answers to the Seven Boom and Bust Questions for each Variable.

Variable	Q 1	Q 2	Q 3	Q 4	Q 5	Q 6	Q 7
Interstate Visitors	Yes	No	No	No	No	No	No
Intrastate Visitors	Yes	Yes	Yes	Yes	No	No	No
Total Visitors	Yes	Yes	Yes	Yes	No	No	No
No. Establishments	Yes	Yes	No	No	No	No	No
Capacity Establishments	Yes	Yes	Yes	No	Yes	No	No
Takings	Yes	Yes	Yes	No	No	Yes	No
Build Approvals	Yes	No	Yes	Yes	No	No	Yes
Population	Yes	Yes	Yes	No	No	Yes	No

This analysis of the patterns of change for a number of variables during the six years of the ‘Tourism Boom’ and ‘The Recession’ has illustrated that trajectories last for different periods of time. Even during times of National growth, some local-level tourism-related

variables may experience equilibrium, or even declining trajectories. During times of National decline, these local-level tourism-related variables may exhibit continual growth, limited growth, equilibrium, or decline. The duration of the growth, equilibrium, and declining trajectories as well as the beginning and end years of these trajectories differ. This supports the second Sub-Issue, that a trajectory does not have a predetermined life.

5.5.3 Sub-Issue Three - Last Stage Not Predictive of Next

The third Sub-Issue states that: **the last stage does not predict the next**. This Sub-Issue follows on from the first Sub-Issue, which stated that there is no set pattern for tourism destination development. If the pattern of change in the period analysed can be any one of the trajectories of the Multi-Trajectory Model of Tourism Destination Change, or a combination of these options, then one stage does not automatically follow another. Any of the trajectory options may occur after the current pattern. In addition, certain trajectories may take place multiple times during the life of a particular destination variable and others may never occur.

5.5.3.1 The Boom and Bust Periods

To determine whether the one trajectory precedes another, the six year time frame utilised for the previous Sub-Issue was chosen, as outlined in Chapter Four. This incorporated a time when tourism in Australia generally experienced an expansion, the 'Tourism Boom', followed by a downturn, 'The Recession'. If the ordering of the trajectories was consistent, such a scenario would be expected to produce a growth trajectory followed by a declining trajectory across tourism-related variables.

As seen in the discussion of the previous Sub-Issue, all the analysed variables experienced a positive growth trajectory during at least part of the 'Tourism Boom' period, which lasted from 1986 to 1988. However, there was no set pattern, as variables began the growth phase in different years, the growth trajectories differed in duration, and relevant for this Sub-Issue, the subsequent trajectories evident during 'The Recession' varied.

This section considers the changes from one type of trajectory to another, and whether certain changes are consistent across multiple tourism-related variables. The analysis also

considers different types of growth. The growth periods examined in the previous section are separated into trajectories for the different levels of growth; low growth, high growth, and growth occurring at an increasing rate.

The focus for this Sub-Issue is the order of the trajectories. This aims to establish whether one type of trajectory is consistently followed by another, or whether there is no set order to the changing trajectories. The trajectories for the eight variables during the boom and bust period were separated into the type of trajectories, and placed in order of occurrence (Table 5.4).

Table 5.4 The Order of the Changing Trajectories During Boom and Bust period.

Variable	Trajectory One	Trajectory Two	Trajectory Three	Trajectory Four	Trajectory Five
Intrastate Visitors	E	HG	D	HG	D
Interstate Visitors	HG	LG	D	HG	
Total Visitors	HG	LG	D	HG	
No. Establishments	LG	E			
Capacity Establishments	LG	HG	D		
Takings	IG				
Build Approvals	E	HG	D		
Population	IG				

Legend: HG – High Growth
LG – Low Growth
IG – Increasing Growth
E – Equilibrium
D – Decline

This analysis shows that different trajectory orders occurred during the boom and bust period. As discussed above, the interstate and total visitor numbers follow the same pattern, and both taking and population continued to grow at an increasing rate.

Analysing the order of the trajectories for the variables that changed trajectories during this six year period shows that there is no set trajectory order. For example, a low growth trajectory can be followed by high growth, equilibrium, or even decline. If a variable is

currently in a low growth trajectory, it is therefore not possible to accurately predict which trajectory will be next.

In addition the current trajectory of one variable is not necessarily the same as other variables. At the beginning of the boom period the eight variables analysed demonstrated four different types of trajectories: equilibrium, low growth, high growth, or increasing growth.

5.5.3.2 Addressing Sub-Issue Three - Last Stage Not Predictive of Next

This analysis of the order of trajectories during the boom and recovery periods shows that the trajectories for different variables do not occur in a specific order. Individual trajectories may last for the whole analysis period, or be followed by one of the other trajectories. This illustrates that the existing trajectory cannot be used to determine the future trajectory.

5.5.4 Addressing Research Issue Three - No Predetermined Pattern

The analysis of the trajectories of the different tourism-related data variables demonstrates that there is no particular pattern of change in a destination. Various tourism-related variables experience different trajectories concurrently, and often change to another trajectory at different times. Therefore an analysis of a particular period involves a complex array of current and changing trajectories. This supports the third Research Issue, that there is no predetermined pattern of tourism destination change.

5.6 Addressing the Proposed Multi-Trajectory Model of Tourism Destination Change

This chapter has presented support for the Research Issues and Sub-Issues of the Multi-Trajectory Model of Tourism Destination Change through the analysis of tourism-related data variables within the case tourism system, which incorporates the Sunshine Coast region within the State and National contexts.

This analysis of the data has demonstrated that increasing the geographical size of the area analysed can smooth the pattern displayed by the data variable, that the pattern displayed by total visitor numbers is not representative of all visitor segments or other tourism variables, and that the pattern displayed by tourism variables does not follow a predetermined pattern, as one trajectory does not change to another specific trajectory after a defined period of time.

The demonstration of these Research Issues in the tourism case system analysed shows the need for the proposed Multi-Trajectory Model of Tourism Destination Change as a means of usefully investigating change in tourism destinations.

Chapter 6 The Development of a Tourism System at a Destination - A Conclusion

6.1 Overview of Chapter Six

This chapter reviews the main findings and implications of the study and demonstrates its contribution to future tourism destination development. The chapter consists of five sections. The first section considers the resolution of the research questions, explains how each has been addressed by the study, and considers the research contributions which arose from these guiding questions. The second section presents the additional research contributions and their implications for destination planning and management. Outlining the contributions of this study also resolves the three proposed theses. In concluding, the limitations of this study are discussed, and further avenues of research suggested.

6.2 Contributions Arising from the Research Questions

The following discussion illustrates how each of the Research Questions (from Chapter One), and the Research Issues which result from the proposed Multi-Trajectory Model of Tourism Destination Change (developed in Chapter Two) have been resolved (Figure 6.1).

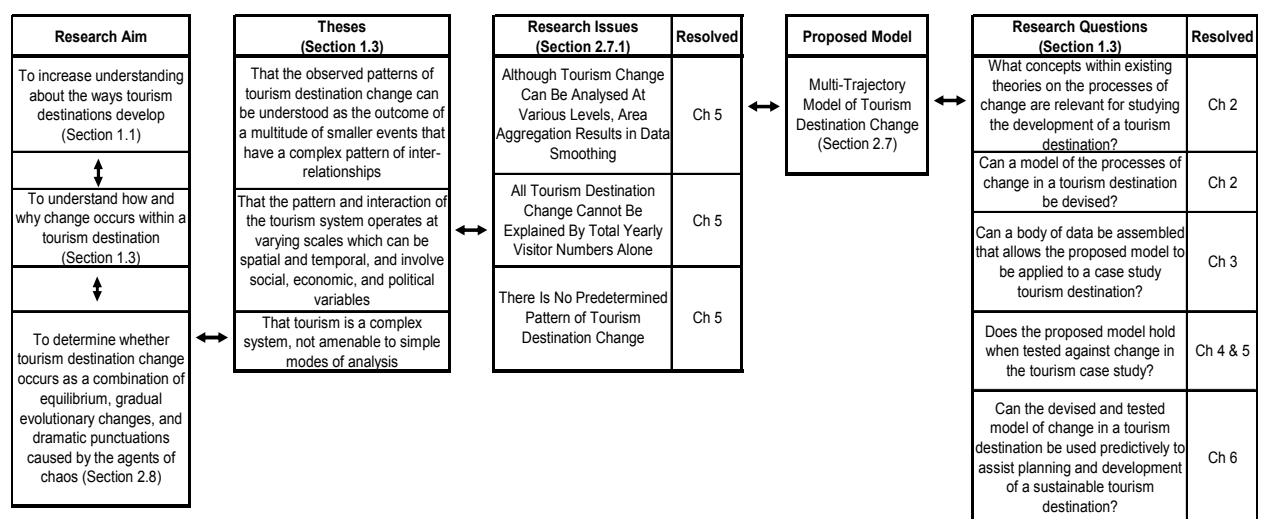


Figure 6.1 Resolution of the Study’s Research Questions and Research Issues. (Developed from Figure 1.3 and Figure 2.19)

6.2.1 Research Question One

What concepts within existing theories on the processes of change are relevant for studying the development of a tourism destination?

Chapter Two reviewed four theories on the processes of change that have been applied to understanding tourism destination development. The existing application of these theories ranged from extensive, for the Destination Life-Cycle Theory (Table 2.2), to limited, for the Species Evolution and Punctuated Equilibrium Theories, to the application of the theoretical concepts, for Chaos Theory. While no individual theory provided a comprehensive model for studying the complex tourism destination system, each theory provided an array of important concepts which can be used to further understand destination development. These concepts and their implications were presented in Table 2.5 (Life-Cycle), Table 2.6 (Species Evolution), Table 2.7 (Punctuated Equilibrium), and Table 2.8 (Chaos Theory). Incorporation of these concepts builds on the commonly used Life-Cycle Theory (Butler, 1980), while still ensuring that the important Life-Cycle Theory concepts are kept. This provides the basis for a more informed and applicable approach to understanding tourism destination development.

6.2.2 Research Question Two

Can a model of the processes of change in a tourism destination be devised?

Utilising the relevant concepts from the four process of change theories, and the insight gained from the analysis of literature, a model was devised in Chapter Two: The Multi-Trajectory Model of Tourism Destination Change (Section 2.7). The underlying premise of this model is that change can occur at any time, and can be in any direction. That is tourism is a system that includes most expressions of change theory in a temporally complex way. Resulting from the model were the three Research Issues of: **area aggregation resulting in data smoothing; destination change is not explained by yearly visitor levels alone; and there is no predetermined pattern of tourism destination development.** This provided a new approach to examining change at a destination. The focus was on the patterns of change evident in data variables, which could be analysed in terms of the trajectories and change points within the pattern. An important aspect of this approach to understanding

tourism destination change was the inclusion of multiple data variables, both tourism specific, and general growth indicators. Possible relationships between these variables added greater depth. Testing such a model required the collection of a significant body of time-series data, its analysis, and presentation.

6.2.3 Research Question Three

Can a body of data be assembled that allows the proposed model to be applied to a case study tourism destination?

The limited availability of data on tourism variables restricted past descriptions of how specific tourism destination developed. Since the early 1980s the body of tourism data in Australia has increased dramatically. As outlined in Chapter Three it is now possible to collect data at various geographical scales, including national, state, regional and even some more recent data is available at the local level. Consequently a vast body of data was assembled on the selected case area for numerous tourism variables, and their sub-categories, as well as for non-tourism growth indicators. However it must be recognised that not all aspects of a destination are measurable, and not all theoretically quantifiable aspects are actually measured. Despite this, the extent of the collection of data provided a sound basis for testing the proposed model. This also illustrates the availability of an extensive, albeit not fully comprehensive, range of tourism and general data variables that can be accessed to understand change in a specific destination.

6.2.4 Research Question Four

Does the proposed model hold when tested against change in the tourism case study?

The proposed Multi-Trajectory Model of Tourism Destination Change was tested through the analysis of data from the selected case area in terms of the Research Issues of the model. These Research Issues and their Sub-Issues were individually tested against the data in Chapter Five. The case area data supports the Research Issues and therefore the proposed model. In summary, the complexity present at lower levels and within sub-categories is not

explained by the data pattern of the higher aggregations, and there is no single pattern which represents the destination's change, as various data patterns exist. As the Multi-Trajectory Model of Tourism Destination Change embraces this complexity and variation, it provides a new and applicable approach to analysing change with a destination.

6.2.5 Research Question Five

Can the devised and tested model of change in a tourism destination be used predictively to assist planning and development of a sustainable tourism destination?

An important contribution of this work is the third thesis which states: **that tourism is a complex system, not amenable to simple modes of analysis.** The proposed model is designed around the complexity, dynamism, and uncertainty that occurs in tourism destinations. Rather than using a theoretical model which may not fit a particular destination, this model embraces the chaos inherent in the system. Tourism destination planning needs to accept that destination growth is not a simple and predictable process, and that both large and apparently small uncontrollable changes in the internal or external environment can affect destination development. In addition, the complex interrelations between the components of a tourism destination system, which also incorporates the external environment, result in a unique combination of factors influencing the direction of a destination at any given time.

6.3 Contributions and Implications for Destination Planning and Management

Significant contributions of this study regarding destination change are related to the first two theses outline in Chapter One (Section 1.3), namely: **that the observed patterns of tourism destination change can be understood as the outcome of a multitude of smaller events that have a complex pattern of inter-relationships,** and secondly: **that the pattern and interaction of the tourism system operates at varying scales which can be spatial and temporal, and involve social, economic, and political variables.** The aspects within

these theses include the complexity within a destination, its dynamism, and the multi-layer destination system (Section 6.3.1) as well as the variety of development patterns at the destination and sub-destination levels (Section 6.3.2). These contributions provide the basis for better informed tourism destination planning and management (Section 6.3.3).

6.3.1 The Complex Dynamic Destination System

6.3.1.1 Destination Complexity

This study has illustrated the complexity of tourism destinations. Each destination is comprised of numerous individual tourism and tourism-related business. This fragmented industry operates within the local environment, with its physical, political, social, and cultural dimensions. In turn, the destination is affected by the wider regional, state, national, and international arenas.

Within the destination, components are connected, some by cooperation, others by competition, and some by supply chains. This destination complexity is further compounded by the varying aims of the different stakeholders, both internal and external. In addition the nature of the systems are such that there is not complete destination management control. An overall vision and management plan can be developed. However implementation and success depend upon collaboration, cooperation, or some complex mix of the two, between the many stakeholders within the destination.

6.3.1.2 Destination Dynamism

In addition to the structural complexity inherent in tourism destination, the situation is continually in flux (temporal complexity). The historical review of Chapter Four and the data presented in Chapter Five highlighted this dynamism. The monthly data patterns showed the variation in visitor numbers, and within this variable, the ongoing changes in the origin of visitors, their ages/stage of life, their spending, and the type of accommodation used, which then affects the occupancy levels within the various accommodation providers.

Over and above changing visitor patterns are other incremental and significant changes. These include new accommodation, changing accessibility, changes in government and new legislation, environmental changes and natural disasters, changing trends in society and

demographics, fluctuating financial and investment markets, and both planned and unplanned events. These changes can also occur at the local, regional, national, and international levels. In addition to the changes themselves, each change can have flow on effects throughout the destination. Reactions and responses, and the timing of such responses vary across the destination, furthering complexity.

6.3.1.3 Destination Levels

The application of the proposed Multi-Trajectory Model of Tourism Destination Change to the various geographical levels of the tourism case area has demonstrated the applicability of the model at these varying levels. The model can therefore be applied to ‘destinations’ at the national, state, regional, and local levels. This is an important contribution of the model as tourism destinations are defined at all these differing levels.

At the national level, marketing activity can be more effectively targeted if it is based on research on the various source regions and countries, as conducted by the national tourism body, Tourism Australia. This involves an understanding of the situation in important markets, including the economic climate and exchange rate, the government outlook and regulations regarding outbound tourism, as well as social and cultural market preferences for overseas travel (see for example Tourism Australia, 2004, 2005). This study highlights why such research is important. However it is vital that such understanding is actually used as the basis for informed decision making.

At the lower destination levels, this study is also relevant. In the case area analysed in this work, there exists the ‘destination’ of the Sunshine Coast, which incorporates the three ‘destinations’ of Noosa, Maroochy, and Caloundra. As described in the historical summary of the development, these local destinations initially developed quite separately. Additionally each local area is governed by a separate Council, resulting in differing regulations and council agendas over time. This generates additional complexity for planning of the local and regional destinations regarding issues of cooperation, commitment, and consistency. The study shows that different arrangements produce different outcomes.

6.3.1.4 Systems Approach to Destination Change

The Multi-Trajectory Model of Tourism Destination Change incorporates the need for an even more complex systems approach than that used in this work for the study of tourism destination development. The level of complexity, its dynamism, and the multiple destination levels are all addressed by systems thinking. Such an approach provides the basis for understanding the multitude of components and their interactions, without oversimplifying the factors involved in destination development.

6.3.2 Destination Change Patterns

6.3.2.1 Varying Destination Change Patterns

As recognised by Butler (1980) the life-cycle model may or may not fit the overall pattern of development of a particular destination. Despite this acknowledgement the model has been applied both descriptively and predictively. This has resulted in a belief that destinations will follow the life-cycle growth pattern. In contrast, this work has shown that when considering a number of different data variables the gradual S-shaped life-cycle pattern is not always applicable.

For instance, changes in the overall level of occupancy are very unlikely to follow this pattern, as they are the result of the dynamic relationship between the number of rooms and the level of visitation. Occupancy levels may even be higher in the early exploration and involvement stages as the small number of visitors only require a small supply of rooms. A large increase in supply is likely to cause a drop in occupancy until the visitor numbers increase accordingly.

The extensive level of variation in the possible patterns of change for data variables can be understood in the context of the Species Evolution Theory discussed in Chapter Two. As shown, one of the main concepts of this theory is that there are five different patterns within evolutionary change that can occur multiple times and in any order (Tellis & Crawford, 1981) (Figure 2.12). This proposes that there is not one growth process, as defined by the Life-Cycle Theory, but instead numerous options created by varying combinations of the five patterns.

This multi-pattern concept provided the base for the Multi-Trajectory Model of Tourism Destination Change proposed in the conclusion of Chapter Two (Figure 2.16). This model proposes that the growth pattern of a variable may at times be in a state of complete 'equilibrium', undergoing gradual positive or negative 'evolutionary' change, or within a 'chaos' induced 'punctuation' that is causing an immediate, and substantial increase or decrease in growth. These different trajectories are evident in the change patterns of the data variables presented in Chapter Five.

The most common form of growth in the Sunshine Coast data appears to be fluctuating positive and negative evolutionary change, which over the long-term is a positive trend or equilibrium (see for example Figure 5.3 Number of Hotels, Motels, and Guest Houses; Figure 5.16 Population; Figure 5.21 Number of Visitor Nights; Figure 5.40 Average Site Occupancy in Caravan Parks, and Figure 5.43 Visitor Expenditure). However there is also evidence of punctuated change (see for example Figure 5.7 Number of Rooms in Hotels, Motels, and Guest Houses). This form of change is addressed by the theory of Punctuated Equilibrium presented in Chapter Two. A main concept of this theory is that change can occur in an episodic pattern (Table 2.7).

Such change has been demonstrated for tourism by Carter (2000; 2004). As discussed in Chapter Two, he proposes that various growth indicators including the level of development and the number of visitors will increase in a step like pattern. Data on these two variables for the Sunshine Coast illustrate that this proposition holds for the development indicator but is not as evident for visitation.

The growth in the number of rooms available in hotels, motels, and guest houses in the Sunshine Coast region (Figure 5.7) was significantly and suddenly affected by the addition of new hotels, including the Hyatt Regency Coolum in 1988 and the Sheraton Noosa Resort in 1990. The addition of the rooms occurred in a step like pattern during the growth period between 1987 and 1990. This phenomenon is understandable as the opening of a large hotel will immediately affect the total supply of rooms in the region by the magnitude of the development. In contrast the pattern displayed by the level of visitation to the Sunshine Coast has fluctuating periods of both increasing and decreasing numbers with an overall rising trend, rather than the step wise episodic growth shape (Figure 5.21).

The Multi-Trajectory Model of Tourism Destination Change has incorporated these concepts, highlighting the various different trajectories that a destination may experience over time. The above discussion shows that the research aim developed in the work was met (Section 2.8). Tourism destination change occurs as a combination of equilibrium, gradual evolutionary changes, and dramatic punctuations caused by the agents of chaos.

6.3.2.2 Variation in Underlying Patterns

The Multi-Trajectory Model of Tourism Destination Change is based on the premise that the destination growth level is ultimately the culmination of the change patterns of all the individual companies and products offered. As a result each component of the tourism system can affect the development of the destination.

This is exemplified by the growth in the supply within an accommodation sector, which is obviously significantly affected by the addition of one large hotel to the destination. On the Sunshine Coast, the opening of the 324 room Hyatt Regency Coolum in 1988 changed the number of regional establishments (Figure 5.3) and more significantly the total number of rooms available (Figure 5.7).

This basic principle can be applied to different variables, as the overall pattern of a particular variable is ultimately an aggregate of the change patterns of the categories that make up the variable. Although the overall pattern may be growth, this may be the result of a combination of an increase in certain categories of the variable combined with a decline in others.

On the Sunshine Coast the total number of intrastate visitors decreased in 1988, while Expo 88 was being held in Brisbane. This overall decline was really the combination of an increase in the number of Queensland visitors aged over 40, with a larger decline in the number of visitors from Queensland under the age of 40.

The Multi-Trajectory Model of Tourism Destination Change illustrates the need to consider the many underlying variables and their patterns of change to provide a more detailed understanding of the complex change within a destination.

6.3.2.3 Not One Destination Pattern

This study has shown that there are differences in destination change patterns. This occurs both across destination variables and within the sub-categories of individual variables. This challenges the notion that a destination will simply follow the life-cycle pattern.

Even if the number of visitors to a destination was to follow the classic life-cycle pattern, data on other variables may generate alternate patterns. For instance, the pattern of visitor numbers may indicate the 'maturity phase' of the life-cycle. At the same time the number of visitor nights may be rising, due to an increasing average length of stay. Such a situation is likely to result in higher occupancy levels and ultimately the need for additional accommodation. This would not be expected if the destination was really in 'a maturity phase'. However, further investigation would be required before investment in accommodation is undertaken. The increase in visitor nights may be occurring for a particular type of accommodation. In fact there may be a rise in the number of visitors staying for an extended period in their own property. Investment in a hotel or unit complex would then be unwise.

This example has highlighted the need to analyse the concurrent destination change patterns in generating a greater understanding of destination change, as there is not a predetermined pattern a destination must follow. The Multi-Trajectory Model of Tourism Destination Change, developed by this work, provides a useful model for such detailed analysis. The model is therefore an important contribution of this research, not the least because it demonstrates that tourism is an extremely complex socio-economic phenomenon with positive and negative outcomes.

6.3.2.4 Multi-Variate Destination Change

This study incorporated a multitude of tourism and growth related variables and has also considered the patterns produced by the component sub-variables. This has provided the opportunity to study correlation and interaction between variables. Analysis of the underlying changes in a destination provides a more detailed understanding of how the growth occurred and assists in explaining the overall development process. Therefore understanding the tourism system operating at a destination requires the analysis of multiple variables that accompany change at a destination.

The Multi-Trajectory Model of Tourism Destination Change proposed by this study is applicable to various data variables and their sub-categories. This includes both tourism specific variables, and other indicators of change. The model also suggests a starting point for the development of a systems analysis strategy for the study of tourism.

6.3.3 Shaping Destination Development

6.3.3.1 Sustainable Tourism Development

This study provides a model on how change occurs in the development of a tourism destination. This knowledge can be used to assist in achieving more sustainable tourism destination development.

Developing sustainable tourism that is appropriate for an area necessitates an understanding of the tourism destination system, in terms of both the internal interactions and the responses to external influences. Insight into these interactions and responses allows decisions to be made on the required type, extent and timing of suitable strategic interventions to achieve the desired tourism development.

Those involved in planning for sustainable tourism require an understanding of change within tourism destinations. This study provides practical information for tourism planners, as the model of tourism destination change outlines the variety and magnitude of possible growth patterns that occur as destinations develop.

6.3.3.2 Identify Changing Trajectories

The Multi-Trajectory Model of Tourism Destination Change can be applied to understand the change at a destination. Such understanding can then be used to develop a framework for planning strategic intervention, which therefore allows for management of change.

When the type of change of a particular destination variable progresses to another change type, a new trajectory is commencing. Tourism planners need to identify this change point and the new trajectory, as this is the direction that the destination is heading.

6.3.3.3 Encouragement and Prevention

Identifying the current trajectory of change allows tourism planners to understand the multiple future states that the destination is progressing towards. This allows planners to assess whether the future state is desirable. If so, this type of change can be encouraged and supported. However, if the potential future is undesirable, steps can be taken wherever possible to prevent the future state from occurring. This approach can foster early proactive prevention. Destination development can thus be shaped.

6.4 Limitations of the Multi-Trajectory Model of Tourism Destination Change

6.4.1 Time Frame Applicability

Tourism destination change can be analysed at various temporal scales. The Multi-Trajectory Model of Tourism Destination Change appears to be most applicable in the medium time frame.

If too short a time frame is used for yearly data, such as three years, the values would just appear to have the two trajectories, or possibly only one. Such a short measurement period may indicate yearly trajectory changes, which if inspected over a longer period could simply be fluctuations within a single overall trajectory. It also may not be possible to distinguish between gradual or dramatic change as there is no basis for comparison.

At the other end of the spectrum, too long a time frame could conceal trajectory changes which appear as variation from the overall trend. This is particularly relevant for analysis at higher geographical levels, such as for national data.

In addition it is important to note that data could generate different patterns if the analysis time period is changed. Inspection of a longer or shorter pattern of data may generate alternate trajectories and change points. In the six year analysis conducted in Chapter Five, a drop for 1990 followed by a rise for 1991 may be two separate trajectories, or one, depending on the change recorded for 1992.

6.4.2 Application of the Model

As with all theoretical models, if the theorem fits the observed real world then the model is supported, but not proven (Levy, 1968). The Multi-Trajectory Model of Tourism Destination Change is supported by the analysis on the case study area, which includes data from the three Local Areas, the Sunshine Coast region, Queensland and Australia. However this does not prove the model. Despite this, the findings of this case study provide a useful framework to hypothesise about the growth of tourism destinations.

6.5 Avenues of Future Research

6.5.1 Why Change Occurs

This study has focused on the patterns of change evident in a range of data variables, including tourism specific data and general growth indicators, data from different geographical levels, and sub-categories within data variables. Providing a context for this time-series data analysis is the qualitative description of tourism destination development provided in Chapter Four. This study therefore provides the basis for future research into why these patterns occur.

Such research could focus on understanding the preconditions that allow, encourage, constrain, or prevent certain patterns of growth. Such knowledge would further assist destination management planning in refining tourism development.

6.5.2 Economic Theories

Increased understanding of the change within a destination may be generated through the application of economic concepts and tools. As proposed by Prideaux (1998; 1999a; 2000), in the development of his Resort Development Spectrum mentioned in Section 1.1, the equilibrium price points determined by supply and demand change over time and with destination capacity. Such economic concepts can provide the basis for further research into

the destination change variables, the relationships between them, and the trajectories and patterns they generate.

6.5.3 Chaos Theory

Greater understanding of the reasons for the change in destination variables can be achieved by considering a number of concepts offered by Chaos Theory. As discussed in Chapter Two (Table 2.8) these concepts include the butterfly effect, bifurcations, lock-in effect, and edge of chaos. Furthering the research conducted by Faulkner and Russell (1997; 1999) these concepts can be explored to understand the change points, when one trajectory changes to another.

6.5.4 Agent Theory

As described in the historical summary of tourism development in Chapter Four, individual and group decisions and actions have significant impact on the direction and extent of development. The role and impact of these people could be further understood by applying concepts from the recently developed agent theory. This theory offers insights into the various types and roles of particular agents. In tourism destinations such agents could include local government, local associations, and developers.

6.5.5 Recent Destination Development

At the time that this study was initially planned tourism data collection in Australia had recently changed. In order to collect time-series data over an extended period it was necessary to use the pre 1998 measurements. This also provided the opportunity to analyse destination change from the beginning of tourism data collection in the various levels of the case area, thereby generating an historical understanding of the destination system.

As time has passed, it would now be possible to collect and analyse the tourism time-series data from 1998 onward. This would provide further opportunities for model development to

better understand the recent changes in the tourism case area. Such research could determine whether the trends identified in this study continued into the 21st Century.

In addition, the impact on the various destination levels by more recent events, such as September 11, the War on Terror, the Bali bombings, SARS, and the Asian Tsunami could be analysed. This would link into the current and growing interest in crises and turbulence in society, and the subsequent effects on tourism development and travel (Faulkner, 2001; Glaesser, 2003; Prideaux et al., 2003; Butler, 2004).

6.5.6 Relationships within Destinations

Further investigation could be undertaken of the relations between components of tourism destinations. A theme that has emerged from this work has been the relationship between positive building and investment periods, and the construction of tourist accommodation. This appears to have impacted on the timing, extent, and type of development undertaken. There appears to be less correlation with accommodation provision, and the trends in visitation and the types of accommodation used and needed. Such detailed research into particular aspects of a destination could yield greater understanding of how the system operates, and highlight opportunities to adjust the system to increase financial sustainability.

6.6 Conclusion

“Theories are nets cast to catch what we call ‘the world’: to rationalise, to explain, and to master it. We endeavour to make the mesh ever finer and finer” (Popper, 1959 p.59). Tourism is a relatively young discipline so it was reasonable to initially borrow theories of change from other disciplines to explain tourism destination development. This study has shown the limitations of these early destination models, and the need for a model which was developed specifically for tourism, and which incorporates the increasingly complex and dynamic role of tourism in the modern world. While utilising concepts on the process of change from a variety of disciplines, the Multi-Trajectory Model of Tourism Destination Change has the benefit of having been developed from a study within the discipline of tourism. This devised and tested model best captures the issues of tourism destination

development and is a more sophisticated representation of the models of Butler (1980), QTTC and Boeing (1981), Prideaux (1998; 1999a; 2000), Russell and Faulkner (1999), and Carter (2000; 2004). This study has developed destination change theory, providing a basis for the reality of tourism planning for a sustainable future, thus making the net of knowledge finer.

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