

# TOURISM STRATEGY NOOSA 2017-2022





# CONTENTS

Executive Summary	3
Introduction	4
Vision, Mission and Goals	4
Core Values	5
The Noosa Experience	6
Situation Analysis	7-8
Current Situation and Future Growth	9
Game Changers and Enablers	11
The Priorities	12
Priority 1: Engaging Marketing	13
Priority 2: Outstanding Events	13
Priority 3: Empower Industry And Product Development	14
Priority 4: Elevate Sustainability	14
Implementation	15

# TOURISM STRATEGY 2017-2022

## EXECUTIVE SUMMARY

### OUR VISION

To be recognised as Australia's most relaxing, desired and sustainable tourism destination

### OUR MISSION

To facilitate and communicate world-class experiences for the benefit of our members, community and visitors

### OUR GOALS

Value over volume

New and improved world-class visitor experiences, events and accommodation

Spread the benefits across the region

Lift customer satisfaction

### OUR STRATEGIC PRIORITIES AND TARGETS

#### ENGAGING MARKETING

Identify and target high-yield segments in domestic and international markets to grow the economic contribution of tourism to the region and operators

Refresh Noosa brand story and utilise latest technology to engage and assist the customer

Leverage strategic marketing partnerships

Continue to implement global marketing strategy

#### OUTSTANDING EVENTS

Identify, target and attract new events

Leverage events to enhance positive Noosa brand image and attract high-yield segments

Encourage sustainability in events

#### EMPOWER INDUSTRY AND PRODUCT DEVELOPMENT

Improve the quality of current product

Support introduction and development of new product

Initiate, target, advocate and support tourism infrastructure development

#### ELEVATE SUSTAINABILITY

Work with Noosa Council as a trusted advisor to develop and implement a Transport Plan to help ease congestion during peak times

Advocate for the Noosa Biosphere Reserve and the balance between conservation and industry

Evolve Noosa Eco Check by focusing on increasing consumer awareness, business involvement and annual commitment from all members

Establish benchmarked sustainable tourism criteria aligned with the Global Sustainable Tourism Council criteria



## INTRODUCTION

Tourism Noosa takes an integrated destination management approach to marketing the Noosa region domestically and internationally and our activities are guided by this Tourism Strategy. Following on from the achievements of the 2013-2016 Noosa Sustainable Destination Action Plan and recognising the importance of tourism as the Noosa region's largest single economic driver with flow-on benefits to the wider community, this document has been developed to guide sustainable tourism development and destination management in Noosa for the next five years.

Tourism delivered a record \$940m\* to Noosa's economy in total visitor expenditure in the year to September 2016 and the sector is the largest employer in the region. The Tourism Strategy 2017-2022 aims to secure and build on Noosa's position as one of Australia's leading visitor destinations by identifying opportunities for growth.

## OUR VISION

'To be recognised as Australia's most relaxing, desired and sustainable tourism destination'

## OUR MISSION

'To facilitate and communicate world-class experiences for the benefit of our members, community and visitors through innovative actions'

## OUR GOALS

- Focus on **value over volume** by targeting high-yielding visitors, particularly from interstate and international markets
- Identify, attract and nurture new **world-class visitor experiences, events and accommodation options**
- **Spread the benefits** and reduce the impacts of seasonality with greater dispersal of visitor expenditure across the destination and through increased off-peak and mid-week visitation
- **Lift customer satisfaction** by assisting our tourism operators to deliver exceptional customer service

# TOURISM NOOSA'S CORE VALUES

Tourism Noosa strives to create a culture in its team, members and partners of action, service, integrity and community.

Tourism Noosa acknowledges a sustainable future is built by many, not a few, and sees its role as harnessing the collective energy of all in achieving its vision to be recognised as Australia's most relaxing, desired and sustainable tourism destination.



**ACTION**

- Lead by example - deliver what is promised
- Actions speak louder than words
- Evolve and innovate

**INTEGRITY**

- Do the right thing
- Our members are our priority
- Respect other views

**SERVICE**

- Guide a better service culture
- Harness local passion
- Strive to improve

**COMMUNITY**

- Value partnerships
- Encourage shared efforts
- Create a sense of family



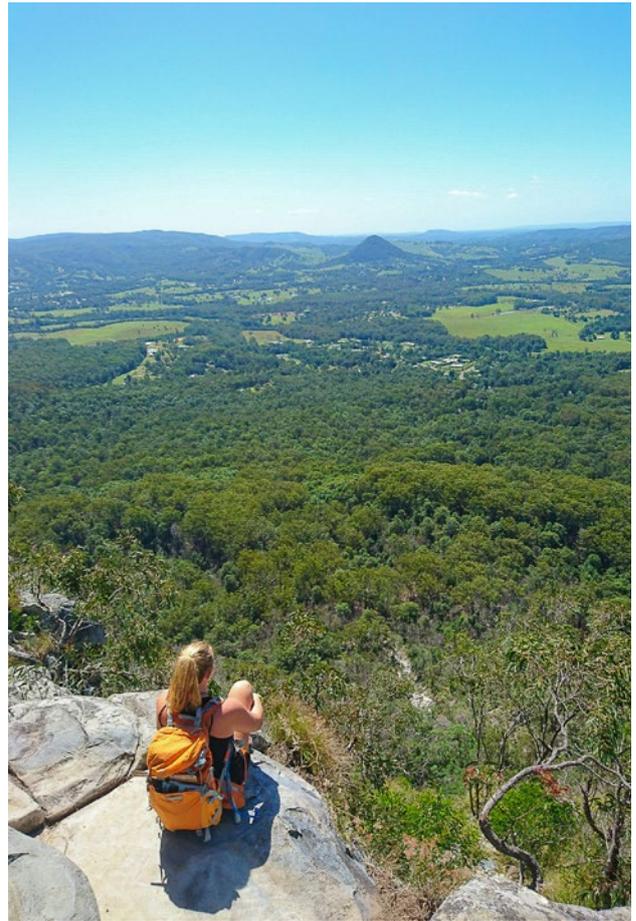
# THE NOOSA EXPERIENCE

Noosa is one of Australia’s leading holiday destinations, attracting approximately 2.36 million visitors in 2016\*. Home to more than 52,400 people\*\*, Noosa is located at the northern end of the Sunshine Coast in Queensland, a 90-minute drive north of Brisbane.

Noosa sits within the Noosa Biosphere Reserve, recognised by UNESCO as an example of a diverse ecosystem where people have learned to live harmoniously with the environment.

With a constant flow of domestic and international visitors, Noosa has developed as a world-renowned relaxation destination, known for its picturesque bays, family-friendly beaches, National Parks, Noosa Everglades, leading food experiences, and as a gateway to World Heritage-listed Fraser Island.

The popularity of the town as a visitor destination has prompted Tourism Noosa to develop a new Tourism Strategy for 2017-2022, building on the current Noosa Sustainable Destination Action Plan 2013-2016. This new Tourism Strategy clearly identifies key opportunities for the destination to further grow the benefits from tourism, simultaneously promoting economic, social and ecological sustainability of the region.



## THE PROCESS

Development of the Tourism Strategy has followed an extensive schedule of research, engagement, development and delivery (Figure 1).



Figure 1: Tourism Strategy Noosa Approach

\* Source: Tourism Research Australia National and International Visitor Surveys, year ending September 2016

\*\* Source: Noosa Shire Council Community Profile, April 2015

# SITUATION ANALYSIS

This analysis of Strengths, Weaknesses, Opportunities and Threats is based on stakeholder, membership, industry and partner feedback.

## STRENGTHS

- Established, strong brand and reputation
- Accessible yet delivers a sense of escape with a range of experiences
- Considered a 'green' destination with low density population, national parks, waterways, hinterland, towns and villages
- Recognised as a safe community and environment
- Easily accessed by road from Sunshine Coast Airport
- Boutique villages surrounded by nature with independent retailers, restaurants and cafés
- Ideal climate throughout the year
- Strong events calendar
- Strong social media assets
- Offers the experience visitors are seeking in a coastal holiday including beaches, outdoor activities, wildlife, food and wine, and shopping
- Popular destination for sea change - new talent and investment coming into the region
- Supportive tourism industry and members
- High-profile personalities linked to Noosa

## CHALLENGES

- Inconsistent tourism service levels
- Can be vulnerable to bad weather
- Mobility, parking and transport, congestion at peak times
- Lack of availability of short-term room stock
- Lack of large conference facilities with high-quality brand association and occupancy availability
- Degree of seasonality peaks and lows
- Lack of new iconic attractions or tours

## THREATS

- Increasing competition from destinations that are re-investing in their product
- Continued growth in outbound travel by Australians
- Lack of expansion of aviation services
- Congestion on the Bruce Highway and road access
- Lack of investment in new and existing product, particularly accommodation
- Excessive visitor numbers overwhelming infrastructure and services
- Unrest in target countries due to internal policies/politics
- Potential loss of safe marine environment



## OPPORTUNITIES

- Build the number of eco-accredited operators
- Facilitate product development that meets consumer demands for authenticity and nature-based experiences
- Possible development of new air links with the privatisation and expansion of Sunshine Coast Airport
- Development of more regional airline routes and seat capacity
- Leverage events and the conference market to convert to leisure
- Further develop the opportunity of the National Surfing Reserve
- Promote the range of hinterland, nature-based and adventure experiences to help disperse visitors throughout the region
- Balance visitor numbers between segments – off-peak, business events, day trippers, overnight
- Support the development of experiences through the wider Noosa region
- Dovetail with Tourism Australia’s strategy for restaurants, coastal and aquatic and nature/wildlife
- Increase focus on utilising latest technology to distribute content for destination marketing
- Capitalise on the emerging youth influence bringing new business
- Target the working holiday market from UK, Canada, Ireland and Nordics (over 44% of what they earn they spend in the destination)
- Evolve the destination through new product and packages
- Involvement and input into Noosa Council’s Transport Plan as a trusted advisor role
- Increase focus on high-spending interstate and international visitors
- Develop partnerships with luxury brands and travel companies



# THE CURRENT SITUATION AND FUTURE GROWTH

## CURRENT NOOSA TRENDS\*

The year to September 2016 delivered record visitor spend in Noosa of \$940m which was a 36% increase on the previous year (the Statewide increase was 5%). Noosa's result was mainly due to a 77% rise in spend from interstate markets (mostly Melbourne and Sydney), where Tourism Noosa focuses its marketing activity to capture this high-yield sector. Interstate visitors have the highest average daily spend of any of Noosa's visitors (\$228) and account for 50% of the total spend while making up only 15% of visitor numbers, making them an important value-over-volume target market.

Noosa has gained share of Sunshine Coast and Queensland visitors since 2010:

- Share of visitor nights in Queensland has risen from 3.1% to 3.3%
- Share of Sunshine Coast nights has risen from 27% to 30%
- Share of overnight visitors (domestic and international) in Queensland has risen from 4.25% to 4.35%
- Share of Sunshine Coast overnight visitors has risen from 27% to 28%.



## FUTURE GROWTH

### MANAGING PEAK DEMAND IN NOOSA

An extra 1600 visitors per day are estimated to visit in 2022 (on average), or 2.9 million visitors in 2022, having implications for managing peak demand (see seasonality over page).

### SOLID NATIONAL GROWTH

↑4-6% p.a. in domestic and international visitor forecasts respectively to 2022.

### GLOBAL GROWTH

↑4% p.a. global increase in visitors. Strongest growth from Asia-Pacific, ↑5% p.a. to 2030\*\*.

### TARGET \$1 BILLION PLUS

+\$0.5 billion of additional tourism expenditure is forecast, taking the overall stretch target spend to almost \$1.4 billion in 2022.

## IMPORTANCE OF INTERSTATE MARKETS

Visitation to the Noosa region since 2010 has grown faster than Queensland (↑6% p.a. for Noosa, ↑4% for Queensland), following strong domestic visitor numbers, particularly from interstate.

The interstate market accounted for 42.3% of domestic overnight visitors and 69.2% of domestic spend in Noosa in 2016. Continuing the significant growth rate in this high-yielding market (+50.4% in 2016) will see it overtake intrastate visitors as Noosa's major overnight origin.

\* Source: Tourism Research Australia National and International Visitor Surveys, year ending September 2016

\*\* Source: UNWTO & GTERC 2014, Asia Tourism Trends

Based on growth rates by Tourism Research Australia's Tourism Forecasting Committee, drawing on a range of factors that include the health of the source market economy, access and competitive forces. These however are only estimates, and should be treated as conservative forecast estimates.

# SEASONALITY

The following graph shows the likely impact of additional domestic overnight visitors to Noosa, by month, in 2022 based on current seasonality trends. While generally following overall Queensland seasonality trends, the opportunity exists to shift visitors to mid-year (May to September), mid-week and outside the current hotspots.

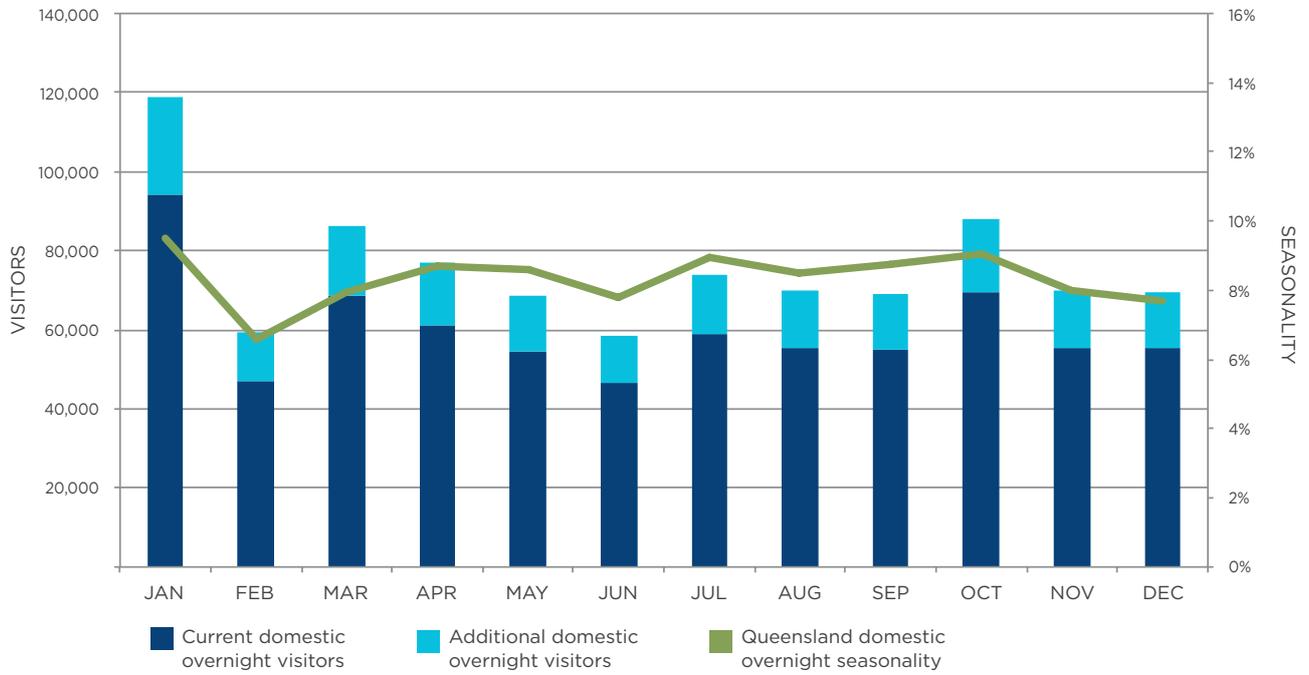


Figure 2: Noosa's forecasted 2022 domestic overnight seasonality compared to Queensland

## WHAT WILL THE VISITOR ECONOMY LOOK LIKE IN 2022?

By 2022, today's 'Millennials' will be aged between 17 and 37, and 'Generation Alpha', will be entering the workplace. Most of the 'Baby Boomers' will be over 65, and today's Generation X will be just approaching retirement. The world will be predominantly urban, with over five billion consumers living in cities. Connectivity will become standard, and travellers will not believe that Wi-Fi was not always available anywhere on the globe.

Almost one billion extra people will be travelling in 2022, and as a result, responsible tourism is likely to become increasingly important and necessary, while authenticity and unique experiences will grow in importance for travellers. The issue of excessive tourism is likely to increase in importance for many top destinations, where many sites are overcrowded.



## GAME CHANGERS AND ENABLERS

- Staying ahead of the competition with **authentic, targeted interstate and international marketing**
- Building a **memorable brand platform** that is easily recognisable, campaignable and engages consumers across multiple media channels
- A proactive approach to product development and the **creation of new experiences**, particularly eco-experiences that showcase Noosa's unique natural environment
- Targeted **investment in events**, trip planning and promotional material to encourage off-peak visitation and geographic dispersal
- Ignite Noosa's authentic nature offering and outdoor experiences to **shift perceptions of the range of activities** available
- Constantly **improving and evolving accommodation** and food product
- **Elevate food** as an integral part of the Noosa experience
- Be globally recognised for our commitment to sustainable tourism through our work with **global sustainability programs**



# THE PRIORITIES

The following four priorities and their actions have been recognised as the key strategies in achieving the vision and goals to 2022.

1

ENGAGING MARKETING

2

OUTSTANDING EVENTS

3

EMPOWER INDUSTRY AND  
PRODUCT DEVELOPMENT

4

ELEVATE SUSTAINABILITY



## PRIORITY 1 ENGAGING MARKETING

Continue to focus Tourism Noosa's main marketing efforts on identifying and developing the high-yield growth markets within interstate and international visitation segments.



### KEY TARGETS

- ▶ Identify and target specific high-yield segments in domestic and international markets to grow the economic contribution of tourism to the region and operators
- ▶ Refresh Noosa brand story and utilise latest technology to engage and assist the customer
- ▶ Leverage strategic marketing partnerships
- ▶ Continue to implement global marketing strategy

### KEY PERFORMANCE INDICATORS

- ▶ Grow preference and awareness of Noosa and its core brand attributes in high-yield interstate and international target markets by 3% p.a.
- ▶ Increase length of stay

## PRIORITY 2 OUTSTANDING EVENTS

Build an iconic events calendar through targeted investment and add new events to encourage off-peak visitation and enable geographic dispersal.



### KEY TARGETS

- ▶ Identify, target and attract new events
- ▶ Leverage events to enhance positive Noosa brand image and attract high-yield segments
- ▶ Encourage sustainability in events

### KEY PERFORMANCE INDICATORS

- ▶ Lift the Noosa brand by introducing two new iconic events by 2022

## PRIORITY 3 EMPOWER INDUSTRY AND PRODUCT DEVELOPMENT

Implement a proactive approach to product development including encouraging re-investment of existing plant and infrastructure. Identify and facilitate the creation of new experiences.



### KEY TARGETS

- ▶ Improve the quality of current product
- ▶ Support introduction and development of new product
- ▶ Initiate, target, advocate and support tourism infrastructure development

### KEY PERFORMANCE INDICATORS

- ▶ Facilitate three new experiences by 2022
- ▶ Standard of existing accommodation product is raised
- ▶ Build year-on-year customer satisfaction improvement

## PRIORITY 4 ELEVATE SUSTAINABILITY

Become globally recognised for Noosa's commitment to sustainable tourism by working with global sustainability programs



### KEY TARGETS

- ▶ Work with Noosa Council as a trusted advisor to develop and implement a Transport Plan to help ease congestion during peak times
- ▶ Advocate for the Noosa Biosphere Reserve and the balance between conservation and industry
- ▶ Evolve Noosa Eco Check to the next stage by focusing on increasing consumer awareness of the program, business involvement and annual commitment from all members (linking membership with accreditation)
- ▶ Establish benchmarked sustainable tourism criteria aligned with the Global Sustainable Tourism Council criteria and measure annually

### KEY PERFORMANCE INDICATORS

- ▶ Year-on-year improvements of set sustainable tourism indicators aligned with the Global Sustainable Tourism Council criteria



## IMPLEMENTATION

Tourism Noosa will continue to take a destination management approach in implementing the goals and targets set out in this Strategy.

Tourism Noosa management will draw down relevant actions relating to targets within the Strategy into each yearly Business Plan. The progress of the Strategy will be reported to the Tourism Noosa Board on a regular basis. The Strategy will be reviewed annually by the Tourism Noosa Board and progress will be communicated to members and stakeholders.

Through strong leadership and commitment across all four priority areas, the key goals of this Strategy will be achieved for the benefit of Noosa's visitors, tourism operators and stakeholders.



TOURISM  
NOOSA

**T** 07 5430 5000 **F** 07 5430 5011

PO Box 581 Noosa Heads,  
Queensland Australia 4567

[visitnoosa.com.au](http://visitnoosa.com.au)