SUNSHINE COAST TOURISM REGION DESTINATION TOURISM PLAN

Final Report
August 2014
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Executive Summary

Tourism is both a major economic activity and lifestyle driver for the Sunshine Coast tourism region, and visitor expenditure impacts a number of key regional economic sectors. The visitor economy currently injects almost $2.7 billion of direct expenditure into the destination, which, in turn, supports almost 35,200 jobs (direct and indirect). Visitor expenditure also supports a range of infrastructure including restaurants, accommodation, transport and retail which actively contribute to developing liveable communities.

To help achieve Queensland’s 2020 target aspiration of doubling overnight visitor expenditure to $30 billion by 2020, the Sunshine Coast tourism region will have to contribute approximately $3.9 billion towards the 2020 target. In order to do this, a planned approach is required to harness key market segments to drive growth in the region.

Recognising this, the following Sunshine Coast Destination Tourism Plan has been prepared to provide the definitive direction for tourism and events in the Sunshine Coast tourism region towards 2020, highlighting the resources required to achieve the 2020 target and create a sustainable and competitive tourism and events destination.

About the Destination

The Sunshine Coast tourism region, positioned between the Glasshouse Mountains in the south and Inskip Peninsula (gateway to Great Sandy Strait) in the north, is recognised as Queensland’s best loved holiday destination, where the blend of coastal and hinterland experiences have created a lifestyle that’s the envy of Australia.

Straddling the Bruce Highway, and within easy access of Brisbane and Fraser Island, the Sunshine Coast tourism region offers a wide variety of natural experiences set along 100 kilometres of pristine sandy beaches, 10 National Parks and two UNESCO accredited biospheres. Complemented by a temperate, year round climate, this tapestry of coastal and hinterland villages includes world class resorts and quality restaurants and is rapidly becoming known for its rejuvenating properties, fresh produce and relaxing pace. Its natural assets and warm climate provide the perfect backdrop for a range of major and regional events.

The region is predominantly a holiday and visiting friends and relatives destination that possesses three distinct ‘hero experiences’:

- Live the Dream;
- Relax and Revitalise; and
- Explore and Discover.

Key Markets

Tier One

- Connectors in Regional Queensland and Brisbane (400km radius of the Sunshine Coast tourism region);
- Connectors in Melbourne and Sydney; and
- New Zealand and United Kingdom.

Tier Two

- Unwinders in Sydney and Melbourne; and
- Germany, Scandinavia, France, Netherlands, Switzerland, North America, China, Singapore, Malaysia and Indonesia.

Tier Three

- Hong Kong, India and Korea.

New and Developing

- Taiwan.

Opportunities for Growth

To grow and prosper as a destination and to achieve its $3.9 billion aspiration for 2020 (an extra $1.2 billion), it is recommended that the following markets be considered as key target areas for growth of the Sunshine Coast visitor economy:

Primary:

- Midweek Event Tourism (including Business, Leisure and Sporting Events)
- Interstate Fly/Drive (from Sydney and Melbourne) to build resilience

Secondary:

- Nature-based Tourism
- Niche Tourism (food, wellness, golf, soft adventure)
- Drive Tourism (including Long Stay Visitors - seniors/grey nomads)

Emerging:

- Travel for a Purpose (health and education)
Towards 2020

Our Vision
The 2020 Destination Vision for the Sunshine Coast tourism region is:

By 2020 the Sunshine Coast tourism region will be globally recognised as Australia’s premier revitalising holiday destination where the blend of coastal and hinterland experiences showcase the region’s contemporary beach culture.

This vision is built on four pillars:

Welcome: ‘Wanya’ in the words of the Aboriginal people, is an open invitation to feel at home in this place, where the Aboriginal place names and stories enrich the landscape, as do our creative community.

Lifestyle: the Sunshine Coast way of life is for many the ideal. Waking early to see the sun rise, being out in nature to refresh the senses, enjoying healthy fresh, local products, prepared by a local creative genius, and feeling truly connected to the people and places.

Nature: our communities embrace a lifestyle in harmony with nature, with the only place on earth with not one but two biospheres, from spectacular waterfalls, silent waterways, untouched beaches and the serenity of the forests; the Sunshine Coast is naturally refreshing.

Community: our festivals and events, our weekend markets, the conversations on the street corner with coffee and fresh bread, are part of the village lifestyle that defines the Sunshine Coast. Many villages, many cultures, one region, one vision.

Our Goals

1. Extend day & one night stays to grow the advantage with a focus on celebrating sunrise, healthy lifestyle and living the dream. Put a huge focus into events that drive overnight visitation in the off-peak.

2. Create new immersive experiences and events that attract new niche market segments:
   - Nature-lovers: Glass House Mountains, 2 Biospheres & lots of NPs, Waterways and recognising ‘green’ operators
   - Cultural travellers: Link natural advantage with indigenous stories,
   - Gourmet travellers: food and the markets
   - Adventure-seekers
   - Business event incentive packages

3. Increase activity through the use of digital media database marketing / sharing

4. Encourage visitors to explore & connect with better inter and intra-regional access & transport:
   - Linking attractions
   - 5 iconic photo moments with great stories
   - Show how close things are
   - Fully connective region – online / mobile

Beyond 2020:

- Unclog the Bruce Highway
- Link to Cairns and North Queensland to get more flights
- New runway & terminal

5. Build community pride and service culture e.g. Welcome to Noosa
   - Get ready for new markets, including Asia, with the right accommodation (trusted brands) and more operators targeting Asia (International ready)

Destination Priorities

The following priority strategies have been identified for the Sunshine Coast tourism region:

1. Increase the use and build industry skills in digital marketing.

2. Prepare a niche marketing and product development strategy and engage industry on opportunities.

3. Invest in industry education and participation to build mid-week visitation (through Business Events and international readiness).

4. Undertake a major PR and content push for the destination using ambassadors including celebrity endorsements (leveraging well-known locals and investors) to build the brand.

5. Support the development of new nature based iconic experiences of the destination that provide a competitive advantage and use PR and future investment to grow our advantage.

6. Increase investment in interstate (Sydney/Melbourne) marketing of packages and itineraries to increase visitation and average length of stay.

7. Increase air access and route development activity to better attract international and regional markets.
8. As a region, proactively support the growth of signature events and the acquisition of new midweek events across the Sunshine Coast tourism region.

9. Grow Business Events to support new infrastructure including a Convention Centre and branded hotels.

10. Increase road access through improvements to the Bruce Highway.

Contribution of Strategies to the 2020 Target

<table>
<thead>
<tr>
<th>Priority</th>
<th>Contribution to 2020 Target</th>
<th>2020 Value</th>
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</thead>
<tbody>
<tr>
<td>1. Digital Marketing</td>
<td>17%</td>
<td>$649,825,598</td>
</tr>
<tr>
<td>2. Niche Marketing</td>
<td>8%</td>
<td>$324,991,485</td>
</tr>
<tr>
<td>3. Mid-Week Visitation</td>
<td>8%</td>
<td>$299,229,352</td>
</tr>
<tr>
<td>4. PR Push</td>
<td>6%</td>
<td>$236,265,220</td>
</tr>
<tr>
<td>5. Nature-based Experiences</td>
<td>6%</td>
<td>$234,047,288</td>
</tr>
<tr>
<td>6. Interstate Marketing</td>
<td>6%</td>
<td>$218,717,501</td>
</tr>
<tr>
<td>7. Air Access / Route Development</td>
<td>5%</td>
<td>$187,880,631</td>
</tr>
<tr>
<td>8. Signature Events</td>
<td>3%</td>
<td>$104,684,954</td>
</tr>
<tr>
<td>9. Business Events</td>
<td>1%</td>
<td>$8,738,609</td>
</tr>
<tr>
<td>10. Road Access</td>
<td>20%</td>
<td>$776,085,781</td>
</tr>
</tbody>
</table>

TOTAL CONTRIBUTION TO 2020 TARGET $3,060,476,420

ACTUAL 2020 TARGET $3,933,799,743

SHORTFALL $873,323,323

To assist in making up the $873 million shortfall of the region’s 2020 target, an additional four strategies have been developed for consideration.

1. Support a whole-of-Australia marketing push to grow existing and emerging markets and average length of stay (bringing in an additional $320 million).

2. Collaborate on the development of a new Sporting Stadium to attract major national and international sporting events to the region (bringing in an additional $300 million).

3. Collaborate on the development of a new Conference Centre to bid and attract major business and cultural events to the region (bringing in an additional $250 million).

4. The tourism sector to partner with the freight sector and other destinations to build the case for bringing forward the investment in the Bruce Highway.

Enablers of Success

- Encourage investment in the Sunshine Coast Airport, including private sector investment, making improved air capacity to the region a high priority.

- By growing business events, assist in building a case for investment in an iconic convention and cultural centre and 4 branded/5 star hotel as a part of the Maroochydore CBD revitalization (3,000 plus capacity).

- Expand the Welcome to Noosa program across the Sunshine Coast tourism region to improve customer service and product knowledge by frontline staff.

- Create a reward and recognition program using operator-led incentives for high performing staff, giving them free or discounted access to the region’s best experiences.

- Create a locals/VFR discount program to encourage repeat visitation.

- Increase visitor awareness of the existing support and incentives in place to attract investors to the Sunshine Coast tourism region, and work with Councils to ensure the planning schemes act as enablers of suitable tourism investment.

- In partnership, build the case for the duplication of the current rail line to Landsborough with benefits for both freight and passenger movement (including visitors).

- Work in partnership with QTIC to improve the competitiveness of the tourism industry by advocating for workplace relations reform that recognises the tourism industry as a 7 days a week, 24 hours a day industry. Consider multiple locations within the Sunshine Coast tourism region as key tourism precincts and allow for more flexible and competitive workplace employment agreements.

- Where relevant, implement the outcomes of the Drive Tourism Strategy and Camping Options review at a regional level to maximise the value of the tourism and long-haul drive markets.
SETTING THE SCENE
The Sunshine Coast tourism region is well positioned to meet the 2020 target of doubling visitor expenditure set by the Queensland Government given the right support.

This won’t be achieved through growth in the leisure market alone, it will be possible through the broader definition of the visitor economy which includes visiting friends and relatives, business visitors, event visitors (including sporting) and those who travel for a specific purpose (e.g. health, education).

Tourism is already worth almost $2.7 billion\(^1\) in direct expenditure, which supports nearly 35,200 jobs direct and indirect. **The aim is to stretch the value of the visitor economy to $3.9B by 2020.**

The Sunshine Coast tourism region believes they can, with the right level of support, meet this target by growing the broader visitor economy.

Figure 1 below shows the 2014 and stretch target expenditure estimates by market segment.

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\(^1\) 2014 visitor expenditure is derived from actual expenditure for the region (TEQ Sunshine Coast Snapshot YE March 2014).
What is a Destination Tourism Plan?

Destination Tourism Planning is the next evolution of destination management. With the emphasis and decision-making moving to the destination, a clear direction for tourism and events in that destination needs to be articulated to its stakeholders. A Destination Tourism Plan (DTP) draws on the existing reports and resources already prepared at a local, regional, state and national level.

The aim of the DTP is to provide the definitive direction for tourism and events in a destination towards 2020, highlighting the resources required to create a sustainable and competitive tourism destination.

A key feature of the DTP is that it is directly linked to the State (and National) targets to double the value of tourism, while recognising the local challenges and opportunities of the destination’s unique tourism assets, unique development, marketing and management needs.

Based on available research, consultation and stakeholder feedback, and a review of existing planning, reviews and reports, the Destination Tourism Plan builds on grass roots level support for key initiatives from local tourism organisations, tourism boards, local government, and operators.

Objectives of a Destination Tourism Plan

• Develop and implement a best practice destination tourism plan that aims to attract visitors, distribute economic benefits to the destination and support a sustainable tourism industry.
• Outline the value of tourism and events to the wider regional economic base in terms of expenditure, jobs and industries supported by tourism and events.
• Recognise and build on the unique features of the destination and its stakeholder needs.
• Identify unique tourism experience, product and event development opportunities and associated key infrastructure needs required to meet the needs of consumers.
• Confirm a clear tourism and events marketing strategy and direction.
• Confirm a clear events strategy and direction.
• Influence policy and legislation to benefit the tourism industry and to facilitate continual improvement (capacity building).
• Strengthen environmental management and planning for future growth.

The difference is made in open and honest communication and matching the unique assets and people in the tourism network to the trends and opportunities and by prioritising our effort.
Why Prepare a Destination Tourism Plan?

Tourism is recognised as one of the four pillars of the Queensland economy and a significant contributor to employment and the future economic prosperity of the State. The Queensland Government, through the inaugural DestinationQ forum in 2012, acknowledged the fundamental role of the destinations in returning Queensland to its rightful place as Australia’s pre-eminent tourism destination. Each destination has its own unique experiences, opportunities and challenges and therefore each needs to set its own clear direction. That is the role of a Destination Tourism Plan (DTP).

There are many reasons for a destination to be proactive in setting and articulating its direction and key priorities towards 2020 through a DTP, these include:

Meeting the future needs of visitors

Not only are visitor expectations constantly rising, but forecasts for Australia and Queensland suggest a significant shift in the markets each destination will have to cater to. Almost half of the forecast growth for Queensland will come from key international markets including both traditional markets (Japan, New Zealand, Germany, the United Kingdom, and U.S.A.) and emerging markets such as India and China. In addition to their origin, destinations need to respond to changing visitor needs as they become more active, adventurous, and engaged as well as shifting travel planning and booking needs.

Engaging local, regional, state and national partners

Tourism is everyone’s business. Working in isolation, the traditional tourism industry cannot achieve the vision. The aim of the DTP is to gain local, regional, state and national support for the Sunshine Coast tourism region’s priorities based on firm understanding of its opportunities and challenges.

Demonstrate the destination’s contribution to the State and National Target – Double overnight visitor expenditure by 2020

Embracing the national direction, Queensland has set an ambitious target of doubling overnight visitor expenditure to $30 billion by 2020. Each destination has a significant role to play in achieving this target, how that will be achieved is a clear outcome of the DTP process.

Balancing future tourism and events growth with local aspirations

Reaching, or exceeding, the target will have an impact on how the local community feels about tourism and events in their community. The future plans for tourism and events in the Sunshine Coast tourism region need to align to, and contribute to, the community’s aspirations and that of the organisations that represent their interests including local government, economic development organisations, chambers of commerce, industry associations, community conservations groups and others.

To get the full support of its partners – the Sunshine Coast as a destination has to articulate where it is going, why and how. That is the role of a DTP.
The Role and Economic Contribution of Tourism and Events

Tourism and events are part of the broader visitor economy which this DTP aims to grow. The visitor economy includes all leisure travel, and travel associated with business, events, visiting friends and relatives, and for the purpose of health and education).

Based on estimations from the National and International Visitor Surveys, the visitor economy injects approximately **$2.7 billion of visitor expenditure** into the Sunshine Coast tourism region’s economy. This in turn generates an estimated overall expenditure impact of **$3.84 billion** (direct and indirect expenditure) across sectors including transport, accommodation and food services, and retail trade.

In the Sunshine Coast tourism region, the visitor economy contributes to **35,194 jobs**\(^2\), providing employment opportunities for the local population across a range of industries from accommodation and food services to education and training. Visitor expenditure also supports a range of infrastructure including restaurants, airports and cultural facilities which contribute to developing liveable communities.

An increase in visitation and subsequent visitor spend will have a direct positive impact on local and regional employment figures.

Figure 2 below shows the direct impact of visitors to Sunshine Coast tourism region’s economy starting with direct expenditure and jobs and where that money is spent (based on estimates from the National Tourism Satellite Accounts Deloitte Access Economics\(^3\)).

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\(^2\) based on Access Economics estimates in the Tourism Satellite Accounts and for every $60,863 of visitor spend in Queensland one full time employee is created or supported.

\(^3\) Visitor expenditure impact is derived from actual overnight expenditure (IVS/NVS) plus estimated indirect visitor expenditure, plus generated taxation revenues.
Perceptions of Tourism and Events in the Community

Visitor Perceptions

Tourism and Events Queensland provides a Brand Equity Index (BEI) to measure the perceptions that consumers hold about destinations – which ultimately affect their travel behaviour. The BEI tool quantifies consumers’ attitudes giving it a score out of ten. For Queensland destinations, the majority (50%) of BEI scores are under 1.0, 35% of BEI scores are between 1.0 and 3.0, 15% are over 3.0.

The Sunshine Coast tourism region’s overall BEI has improved to 1.8 after a decline between 2011 and 2012. Amongst Queensland residents the regions BEI scores has improved to 2.3 with a particular strength of brand preference associated with Brisbane respondents and those with kids. In comparison with other Queensland tourism regions, Sunshine Coast currently ranks towards the upper end of the BEI scoring spectrum which is topped by the Gold Coast at 3.

On an interstate basis, the Sunshine Coast tourism region scores 1.5, well behind Gold Coast (2.5), Whitsundays (1.7) and Tropical North Queensland (2.0), but ahead of other competitors such as Northern New South Wales (1.1).

The Sunshine Coast tourism region recorded some very strong ‘loyalty’ scores. A greater proportion of Queenslanders nominated that they are willing to pay more to visit the Whitsundays and the Sunshine Coast than any other Queensland destination. In 2013 there was an increase in Queenslanders recommending the Sunshine Coast tourism region in comparison to others (13% to 17%), and more Queenslanders prefer and recommend the Sunshine Coast tourism region than any other Queensland destination.

Queenslanders know the Sunshine Coast tourism region as a place that is warm, friendly, fun, welcoming, healthy, positive and easy going.

The attributes associated with the Sunshine Coast tourism region also apply to Queensland’s strengths, requiring a greater focus on weaker attributes such as - refreshed and revitalised, healthy, fresh and nurturing – to support brand differentiation.

**Figure 3: Brand Equity Index 2007-2013**

Community Perceptions

The most recent Social Indicators research reveals some very positive attitudes of the local community towards tourism and events. The Sunshine Coast lifestyle lends itself to an outgoing and friendly attitude and people of the region are more likely to chat with tourists (21% compared with QLD 15%).

Over the three-year period from 2010 to 2013, changing attitudes have seen a big rise in the number of residents who want more tourists to come to the region (47% compared with 31% in 2010) and also want tourism growth to continue (59% up from 43% in 2010).

The upswing matches a prevailing state-wide trend, with more residents agreeing with the positive impacts of tourism.

Compared with other Queenslanders, people living in the Sunshine Coast tourism region are more likely to agree that festivals and events attract tourists and raises awareness of the region (94% vs. QLD 87%).

Ninety three percent (93%) surveyed believe tourism and events bring increased cultural diversity, up from 2010 and above the Queensland average of 92%.

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4 Sunshine Coast Social Indicators, Tourism and Events Queensland (2013)
**Table 1: Contact with Tourists, Feelings and Development**

<table>
<thead>
<tr>
<th></th>
<th>Queensland % 2013</th>
<th>Sunshine Coast % 2013</th>
<th>Queensland % 2010</th>
<th>Sunshine Coast % 2010</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Feelings About Tourists</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I like tourists</td>
<td>57</td>
<td>46</td>
<td>49</td>
<td>32</td>
</tr>
<tr>
<td>I tolerate tourists</td>
<td>31</td>
<td>39</td>
<td>35</td>
<td>48</td>
</tr>
<tr>
<td>I adjust my lifestyle to avoid tourists</td>
<td>10</td>
<td>13</td>
<td>10</td>
<td>19</td>
</tr>
<tr>
<td>I stay away from places tourists go</td>
<td>3</td>
<td>2</td>
<td>5</td>
<td>1</td>
</tr>
<tr>
<td><strong>Contact With Tourists</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I never come into contact with tourists</td>
<td>22</td>
<td>8</td>
<td>18</td>
<td>5</td>
</tr>
<tr>
<td>I see tourists around but don’t usually talk to them</td>
<td>51</td>
<td>54</td>
<td>52</td>
<td>56</td>
</tr>
<tr>
<td>I often interact with tourists as part of my job</td>
<td>10</td>
<td>13</td>
<td>13</td>
<td>19</td>
</tr>
<tr>
<td>I often meet tourists around town and talk to them</td>
<td>15</td>
<td>21</td>
<td>14</td>
<td>21</td>
</tr>
<tr>
<td>I have made friends with tourists during their stay but have not kept in contact</td>
<td>7</td>
<td>7</td>
<td>7</td>
<td>9</td>
</tr>
<tr>
<td>I have made friends with tourists and kept in contact after they have left</td>
<td>4</td>
<td>5</td>
<td>4</td>
<td>5</td>
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<tr>
<td><strong>Preferred Development Path</strong></td>
<td></td>
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<td></td>
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<tr>
<td>Happy with continued growth</td>
<td>59</td>
<td>59</td>
<td>59</td>
<td>43</td>
</tr>
<tr>
<td>Happy but no more growth</td>
<td>25</td>
<td>28</td>
<td>25</td>
<td>43</td>
</tr>
<tr>
<td>Want less growth</td>
<td>3</td>
<td>3</td>
<td>6</td>
<td>6</td>
</tr>
<tr>
<td>More growth but different direction</td>
<td>13</td>
<td>10</td>
<td>10</td>
<td>8</td>
</tr>
</tbody>
</table>
ABOUT THE DESTINATION
Destination Profile

The Sunshine Coast tourism region, positioned between the Glasshouse Mountains in the south and Inskip Peninsula (gateway to Great Sandy Strait) in the north, is recognised as Queensland’s best loved holiday destination\(^5\), where the blend of coastal and hinterland experiences have created a lifestyle that’s the envy of Australia.

Straddling the Bruce Highway, and within easy access of Brisbane and Fraser Island, the Sunshine Coast tourism region offers a wide variety of natural experiences set along 100 kilometres of pristine sandy beaches, 10 National Parks and two UNESCO accredited biospheres. Complemented by a temperate, year round climate, this tapestry of coastal and hinterland villages includes world class resorts and quality restaurants and is rapidly becoming known for its rejuvenating properties, fresh produce and relaxing pace. Its natural assets and warm climate provide the perfect backdrop for a range of major and regional events.

The Sunshine Coast tourism region attracts close to 8.2 million visitors annually, with 92% of the overnight market from domestic visitors. Domestic visitation primarily relies on intrastate visitors (which make up 87% of the domestic market)\(^6\); however growth in other markets will be required for the region to be resilient in future. Visitors are attracted to the diverse mix of experiences, natural landscapes and safe, pristine beaches.

The Events sector continues to add significant value to the Sunshine Coast tourism region with more than $80 million\(^7\) in major and regional events contributing each year to the economy and an additional 500,000 room nights\(^8\).

The regional economy is worth $13 billion\(^9\) with tourism related direct expenditure contributing an estimated $2.7 billion\(^10\). The core industries of tourism, retail and construction account for 37% of total employment.

To build the region’s economic resilience, the Sunshine Coast tourism region will seek new investment opportunities associated with seven high value industries:

- Tourism, Sport and Leisure;
- Health and Wellbeing;
- Education and Research;
- Knowledge Industries;
- Agribusiness;
- Clean Technologies; and
- Aviation and Aerospace.

These industries will help to support a resident population of nearly 385,280 (including Gympie Region)\(^11\) covering an area of approximately 10.127 km\(^2\).

\(^{5}\) Tourism Queensland Brand Health Report 2013
\(^{6}\) TRA NVS YE March 2014
\(^{7}\) Value is for Sunshine Coast Council area only and excludes business events
\(^{8}\) Sunshine Coast Major and Regional Events Strategy 2013-2017
\(^{9}\) Total regional value from Sunshine Coast Council Regional Economic Development Plan 2013 prepared by AEC
\(^{10}\) Sunshine Coast Regional Tourism Snapshot March 2014
\(^{11}\) OESR (Treasury)Economic & Statistical Report to June 2012
Competitive Strengths of the Sunshine Coast tourism region

• Over 100 kilometres of safe swimming beaches, 10 national parks, conservation parks and two UNESCO-approved biospheres all of which provide the backdrop for our spectacular natural attractions.

• Diversity of interactive natural experiences within our beaches, forests, animals and flora and fauna

• World renowned man made experiences and golf courses – complemented by a range of accommodation options from beautiful resorts overlooking the ocean, to quaint lodges and charming B & B’s nestled in our pristine Hinterland.

• One of Australia’s healthiest lifestyles reflected in the suite of sporting and food events for which we are becoming globally renowned.

• One of Queensland’s food bowls with an unparalleled range of fresh local produce and seafood embodied in our award winning restaurants, cafes and eateries and, in an array of farmers markets and farmgate/roadside stalls.

• A strong, contemporary arts culture, embraced by the collection of villages in which our artisans showcase their works.

• Glasshouse Mountains, steeped in Aboriginal myth and legend and an historic landmark for the region, as well as a rich pioneering history that witnessed the evolution of Queensland as it is today.

• Easy access from Brisbane and a natural gateway to the world’s largest sand island – Fraser Island.

• Daily air access on Melbourne and Sydney routes, serviced by major airlines and, seasonal flights from New Zealand (June to October).

Please refer to Appendix 4 for more strategic information on Noosa Tourism Region.

Sunshine Coast Tourism Regions

Gympie Cooloola12

The Gympie Cooloola region lies between Fraser Island and the Sunshine Coast and stretches from the historic city of Gympie, East to Tin Can Bay and Rainbow Beach and West through Mary Valley Country and the Sunshine Coast Hinterland. The destination is known for its rich heritage and natural beauty (which incorporates the Great Sandy Biosphere) along with a diverse blend of coast, country and community.

The Gympie Cooloola region sits within the Gympie Local Government Area (approximate population 49,300).

Gympie Cooloola Sub Regions:
• Gympie
• Mary Valley
• Rainbow Beach, access to Fraser Island
• Goomeri and Kilkivan
• Tin Can Bay

Noosa13

The Noosa region towards the northern end of the Sunshine Coast tourism region is one of Australia’s original and most popular beach holiday destinations, attracting more than 2.5 million visitors annually. The destination, known for its low rise and natural elements including ocean, lakes, river and everglades, national parks and hinterland, is a mix of beachfront and riverside villages, rural communities and retail and dining precincts.

The region covers the Noosa Local Government area – from Peregian Beach, Noosa Heads and Noosaville, to the Noosa hinterland and up to Noosa North Shore. It also embraces the nearby heritage-listed town of Eumundi and is the gateway to World Heritage-listed Fraser Island.

Noosa Sub Regions:
• Eastern beach communities of Peregian Beach, Marcus Beach, Castaways Beach, Sunrise Beach
• Sunshine Beach
• Noosa Heads and Hastings Street

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12 Destination Gympie Region website (www.visitgympieregion.com.au)
13 Destination description provided by Tourism Noosa.
• Noosa Junction
• Noosaville
• Tewantin and Noosa Marina
• Noosa North Shore, access to the Fraser Island and Great Sandy National Park
• Noosa Hinterland – Cooroy, Pomona, Kin Kin, Cooran, Boreen Point, and embracing Eumundi

Coolum
With its long shopping and entertainment strip and stunning outlook across a large beachfront park, this beautiful coastal town was first settled by Europeans in 1823.

Nestled halfway between Maroochydore and Noosa, Coolum is a surfing mecca, with a patrolled beach 365 days of the year. Coolum boasts one of the best beachside boardwalks on the Sunshine Coast and is home to the second largest rock in Australia – Mount Coolum, thought to be 26 million years old and classified as a National Park.

Coolum offers a wide variety of beach activities, first class golfing experiences, walking and biking tracks, and dining options, the Coolum region includes:
• Point Perry
• Coolum Beach
• Mt Coolum
• Point Arkwright
• Yaroomba

Mooloolaba/Maroochydore
The Mooloolaba/Maroochydore regions are located at the heart of the Sunshine Coast. This area stretches from the Hinterland to the west, south to Kawana and Caloundra and north to Eumundi and Marcoola. With Mooloolaba one of the most famous beaches in Queensland, the region offers a melting pot of diverse cuisine, stylish boutiques, assorted attractions and numerous events. It is also home to the region’s iconic marine attraction Sealife Mooloolaba.

Mooloolaba/Maroochydore Sub Regions:
• Mooloolaba
• Cotton Tree
• Marcoola
• Alexandra Headland
• Maroochydore
• Twin Waters
• Buderim
• Bli Bli
• Eumundi

Caloundra
The Caloundra region encompasses the southern coastal end of the Sunshine Coast and stretches from Pumicestone Passage to Point Cartwright. Amongst a plethora of beach activities, and a stunning Glass House Mountains, backdrop, this playground of the Sunshine Coast tourism region provides the perfect base to visit the destination’s iconic attractions such as Aussie World, The Big Kart Track and Australia Zoo, which are located right at its doorstep.

Caloundra Sub Regions:
• Caloundra
• Bulcock Beach
• Pelican Waters
• Golden Beach
• Kings Beach
• Kawana
• Dicky Beach
• Moffat Beach

Sunshine Coast Hinterland
The Sunshine Coast Hinterland region is full of natural and coastal country experiences, encompassing the dramatic Glass House Mountains and Blackall Range. The region is full of picturesque scenery and culture, art galleries and boutique shopping. It is also home to the Crocodile Hunter’s world-famous Australia Zoo.

Sunshine Coast Hinterland Sub Regions:
• Flaxton
• Montville
• Maleny
• Mapleton
• Yandina
• Glass House Mountains
• Kenilworth
• Beerwah

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14 www.visitsunshinecoast.com.au
15 Mooloolaba Tourism website (www.mooloolabatourism.com.au)
16 www.visitsunshinecoast.com.au
Destination Hero Experiences and Themes

A tourism ‘experience’ is the emotional feeling or personal achievement a visitor derives from the purchase, participation or consumption of a tourism product – accommodation, attractions or tours. The ‘tourism product’ is what the customer buys; the ‘tourism experience’ is what they remember.

In alignment with the region’s Destination Tourism Strategy 2012-2016, three destination ‘hero’ experiences were developed in 2012 to deliver the regions 2016 tourism vision, brand promise and the ‘themes’ that underpin the destination’s vision and brand.

Hero experiences are those world class experiences that:
- Provide a destination with a real competitive advantage over other destinations,
- Focus on what is truly unique or memorable or engaging about a destination, and
- Meet the needs of the identified target markets.

The three themes and associated ‘hero experiences’ identified for the Sunshine Coast tourism region are:

**Relax and Revitalise**
Feel your batteries recharge as you soak in the Sunshine Coast’s energy-giving warmth and hospitality, whether you choose to sit back and relax or, engage in a range of healthy, revitalising activities.

**Explore and Discover**
Get out and immerse yourself in all that the Sunshine Coast offers from vibrant coastal communities, the hidden treasures of the hinterland and the spectacular beauty of endless beaches, towering rainforests, stunning mountain vistas and quiet rural escapes.

**Live the Dream**
Spend your holiday living like a local and enjoy the unrivalled lifestyle of Australia’s most enviable beach culture.
Destination Vision and Brand

The 2020 Destination Vision for the Sunshine Coast tourism region is:

By 2020 the Sunshine Coast tourism region will be globally recognised as Australia’s premier revitalising holiday destination where the blend of coastal and hinterland experiences showcase the region’s contemporary beach culture.

This vision is built on four pillars:

Welcome: ‘Wanya’ in the words of the Aboriginal people, is an open invitation to feel at home in this place, where the Aboriginal place names and stories enrich the landscape, as do our creative community.

Lifestyle: the Sunshine Coast way of life is for many the ideal. Waking early to see the sun rise, being out in nature to refresh the senses, enjoying healthy fresh, local produce, prepared by a local creative genius, and feeling truly connected to the people and places.

Nature: our communities embrace a lifestyle in harmony with nature, with the only place on earth with not one but two biospheres, from spectacular waterfalls, silent waterways, untouched beaches and the serenity of the forests; the Sunshine Coast tourism region is naturally refreshing.

Community: our festivals and events, our weekend markets, the conversations on the street corner with coffee and fresh bread, are part of the village lifestyle that defines the Sunshine Coast tourism region. Many villages, many cultures, one region, one vision.

Destination Brand

Following extensive research and industry consultation, TEQ and SCDL launched the new Sunshine Coast brand in November 2010.

The new brand platform for the Sunshine Coast is:

Sunshine Coast, Naturally refreshing

Sunshine Coast, Naturally refreshing differentiates the Sunshine Coast tourism region from other Queensland destinations and captures the essence of the region’s holiday experience. It positions the region as Australia’s revitalising holiday experience, where you’ll come away feeling naturally refreshed and relaxed. It also signals the evolution of an integrated Queensland brand family and compliments Queensland, Where Australia Shines as the Sunshine Coast is where Australia shines for a revitalising holiday experience...Naturally.

The Sunshine Coast tourism region’s new brand platform is a powerful claim – it sets the course for Tourism and Events Queensland’s long-term strategy for the region’s tourism future. This strategy includes brand and tactical initiatives; public relations, strategic partnerships, and targeted campaigns with key partners to bring the brand to life and ultimately, to generate an increase in expenditure and visitation to the Sunshine Coast tourism region.

Brand Hierarchy

The brand message delivered to a target market differs depending on how far away the market is from the destination. As a rule of thumb, the further away a customer is from the destination, the larger the area they are aware of. The exception of this rule is where they are travelling for a specific purpose (VFR, business, special interest) in which case they will know a particular location by name (see Figure 4 below).

The region is part of a number of marketing partnerships to reach its consumers. These include those outlined in Table 2 below. Depending on which market the destination is promoting will dictate the core brand promise:

- In the interstate and international fly and fly-drive markets it is the Sunshine Coast.
- In niche markets and for locals the destination will use the sub regions (Gympie/Coooloola, Noosa, Mooloolaba, Caloundra and Sunshine Coast Hinterland).

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17 Sunshine Coast Brand, TEQ (2010)
For targeted international markets the **Australia’s Nature Coast** partnership has been created between the Sunshine Coast and Fraser Coast tourism regions. The core aim of this partnership is to maximise overall growth opportunities for the region by leveraging its natural assets, reinforcing its ecotourism credentials and building its industry capacity.

**Table 2: Messages by Market**

<table>
<thead>
<tr>
<th></th>
<th>Locals/SC Residents</th>
<th>Brisbane/Other SEQ</th>
<th>QLD</th>
<th>Interstate</th>
<th>Niche Markets</th>
<th>International</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sunshine Coast tourism region</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Australia’s Nature Coast</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sub regions: Gympie Cooloola</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Noosa</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mooloolaba</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Caloundra</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sunshine Coast Hinterland</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Competitor Analysis

The Brand Equity Index for 2013 highlights a significant drop in Queensland’s brand equity, driven by Interstate audiences. Asian, Island and American destinations recorded increases in BEI. These external destinations also feature within the Sunshine Coast tourism region’s competitive set. Whilst the region ranks highest amongst Queenslanders based on their perceptions about a destination, the interstate market remains a very competitive space, with the following destinations falling into the Sunshine Coast tourism region’s hero territory:

- Gold Coast
- Tropical North Queensland
- Northern New South Wales
- Hawaii
- Bali
- Fiji
- New Zealand

Based on a comparison of the Sunshine Coast tourism region’s hero experiences versus the above competitive set, the following conclusions have been drawn:

Biggest Competitors in Hero Space
1. Gold Coast
2. Northern New South Wales

Table 3: Competitor Analysis Against the Hero Experiences

<table>
<thead>
<tr>
<th>Destination</th>
<th>Live the Dream</th>
<th>Relax and Revitalise</th>
<th>Explore and Discover</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sunshine Coast</td>
<td>✅</td>
<td>✭</td>
<td>✭</td>
</tr>
<tr>
<td>Coffs Harbour</td>
<td>✭</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Central Coast</td>
<td>✭</td>
<td>✭</td>
<td></td>
</tr>
<tr>
<td>Port Macquarie</td>
<td>✭</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gold Coast</td>
<td>✭</td>
<td>✭</td>
<td>✭</td>
</tr>
<tr>
<td>Tropical North Queensland</td>
<td>✭</td>
<td></td>
<td>✭</td>
</tr>
<tr>
<td>Northern New South Wales</td>
<td>✭</td>
<td>✭</td>
<td>✭</td>
</tr>
<tr>
<td>Hawaii</td>
<td>✭</td>
<td></td>
<td>✭</td>
</tr>
<tr>
<td>Bali</td>
<td>✭</td>
<td>✭</td>
<td>✭</td>
</tr>
<tr>
<td>Fiji</td>
<td>✭</td>
<td></td>
<td></td>
</tr>
<tr>
<td>New Zealand</td>
<td></td>
<td></td>
<td>✭</td>
</tr>
</tbody>
</table>

Direct competitors for specific market segments have also been identified for the region:

Leisure
- Gold Coast
- Northern NSW (Byron/Tweed Coast)
- Short-haul International (Fiji/Bali/Thailand)

Business
- Gold Coast
- Brisbane
- Sydney/Melbourne
- Cairns
- Whitsundays
- Overseas

Competitive Advantages of the Sunshine Coast tourism region
- Naturally refreshing
- More relaxed, less city
- Lifestyle, ease
- Villages
- Coast & Hinterland

Intrastate
- Convenience without being cramped
- Villages
- Compact, ease
- More quality and maturity than NSW

Interstate
- Gateway to Fraser Island via Inskip
- Events
- Real surf, Australian beach holiday
- Instant Noosa recognition
- Warmth
Delivering Community Vision through Tourism and Events

The role and economic contribution of tourism and events in the Sunshine Coast tourism region has been well-recognised and incorporated into a wide number of corporate strategies to direct planning, economic and social outcomes\(^\text{18}\). A full summary of policy and strategy documents will be appended with the final DTP but key strategic plans include:

At a local level tourism is identified as playing an important role in **diversifying the regional economy**:

- **The Noosa Sustainable Destination Action Plan 2013-2016**\(^\text{19}\) sets a new strategic vision for the leadership and management of the tourism industry in Noosa’s community. The vision outlines priorities, actions and measures to take the industry forward over the next three to five years with the aim of **increasing the value of tourism to $1 billion by 2016**. The plan also aims to increase the strength of partnerships between Tourism Noosa and key stakeholders around the region and beyond.

These key objectives will be achieved through an integrated strategy, bringing together priorities for action in the areas of:
- Marketing and events
- Industry and product development
- Sustainability

- **The Sunshine Coast Corporate Plan 2009-2014** – ‘a sustainable tourism industry’ is identified as an emerging priority under the theme ‘Robust Economy’ along with a strategy to work in partnership with industry to “review the nature, purpose and governance of Sunshine Coast peak tourism entities to better market the region and it’s destinations, and to develop and implement a regional major events strategy.”

- **The Sunshine Coast Economic Development Strategy 2013-2033**, further seeks to drive investment and strengthen the region’s tourism sector, in which the region is heavily dependent on, by enhancing the region’s attractiveness to investors and securing infrastructure priorities, whilst diversifying the region’s economy to ensure that the region’s economy is not solely reliant on tourism.

- **The Sunshine Coast Council Major and Regional Events Strategy 2013-2017** highlights large events as a major contributor in stimulating the region’s tourism industry. Major events have significant economic impacts including increased visitations, provide stimulus for local businesses and enhance the viability of tourism-dependent industries. Hosting major events also have capability of building the region’s reputation and generating tourism during off-peak seasons.

- **The Gympie Regional Economic Development Strategy** identifies tourism as a key, but still underdeveloped, economic driver of the region, with particular opportunities in coastal, nature and activity based experiences; The Mary Valley for agri-tourism, edu-tourism, activity based tourism and nature based tourism; Hinterland culinary tourism and the development of food, walking, and riding trails; and Gympie City’s heritage, history and architecture based tourism experiences.

- **The Gympie Regional Council Investment Prospectus** highlights the need to enhance infrastructure to support the substantial and varied coast to city to country tourism opportunities including agri-tourism (through development of farm and nature based activities), adventure-based tourism, rural-based training facilities, events-based tourism (including festivals), bush activity-based tourism, and growth in the ‘grey nomad’ market.

- **The Gympie Council Strategic Tourism Plan 2013** outlined the importance of tourism to

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\(^{18}\) Please note – this is not an exhaustive list of the region’s corporate strategies, rather a highlight of some of the key documents that link to tourism.

\(^{19}\) Please note – At the time of writing this document Noosa did not have their strategic plans written. Once completed, these will be incorporated.
the Gympie Region as it provides economic, infrastructure, social and environmental benefits. In order to promote the region and increase visitation rates, the Plan outlines building on key strengths of the region to capitalise on key opportunities such as growing the business, sports and events market through product development and stakeholder engagement. To bring these opportunities to fruition several key strategies and tactics have been highlighted.

At a regional level the tourism direction has been clearly articulated in:

- The Sunshine Coast Destination Tourism Strategy 2012-2016 provides the framework to maximise and guide the tourism industry by coordinating stakeholders and through critical success factors including: a coordinated approach to destination marketing and promotion; innovative product and infrastructure development across the region; and a tourism industry that is operating at the highest standards of service, safety and sustainability.

- Key intentions identified in the Sunshine Coast Tourism Opportunity Plan 2009 – 2017, included identifying the need for new investment and infrastructure upgrades, providing researched-based information and a mechanism for engagement with infrastructure providers and investors, and an agreed focus for infrastructure providers, private investors and the tourism industry.

The State priority of doubling the value of tourism by 2020 (which builds on the Federal target) is supported by:

- The 20 Year Tourism Strategy and the outcomes of DestinationQ around investment facilitation and attraction, nature-based tourism, the drive market (including the Queensland Drive Tourism Strategy 2013-2015), and the important role of events (2020 Strategic Marketing Plan).

- The Queensland Ecotourism Plan 2013-2020 provides a clear direction for investment in facilities on parks and for Queensland to regain its position as the number one ecotourism destination through world-leading interpretation and presentation.

- The Arts for all Queenslanders strategy 2014-18 prioritises cultural tourism as a niche market with potential to contribute to tourism targets. Though relatively small in number, cultural tourists stay longer and spend more. The strategy aims to support the delivery of original, imaginative and high quality arts and cultural events and experiences that attract visitors and strengthen local community identity and pride.
Figure 5: Alignment with State and National Plans

COMMONWEALTH

Tourism 2020

STATE

20 Year Tourism Strategy
DestinationQ
2020 Strategic Marketing Plan

Queensland Ecotourism Plan 2013-2020
Queensland Drive Tourism Strategy 2013-2015

REGIONAL

Sunshine Coast Tourism Region DTP

Sunshine Coast Destination Tourism Strategy 2012-2016
Sunshine Coast Tourism Opportunity Plan 2009-2017

LOCAL

Gympie Council Economic Development Strategy
Gympie Council Investment Prospectus
Gympie Council Strategic Tourism Plan
Sunshine Coast Council Regional Economic Development Strategy 2013-2033
Sunshine Coast Council Major and Regional Events Strategy 2013-2017
Sunshine Coast Council Corporate Plan 2009-2014

Noosa Sustainable Destination Action Plan 2013-2016
Noosa Council Strategies
Marketing and Promotion

The Sunshine Coast tourism region will be collectively promoted under the creative framework of Brand Queensland, the State tourism approach for Tourism and Events Queensland - a strategy that ensures Queensland’s destinations and experiences are positioned in a way that focuses on competitive advantages and connects with visitors. A cornerstone of the Brand Queensland strategy is four key experience themes:

- Queensland Lifestyle;
- Islands and Beaches;
- Natural Encounters; and
- Adventure.

Key attributes and selling points of the Sunshine Coast tourism region will be showcased via all four of these experience themes.

Industry Development

Build the reputation of the destination for delivering quality product and service standards, through the industry development programs such as: domestic and international ready, better business practice, service delivery, digital ready, and crisis management.

The region also needs to be established as a leading ‘sustainable tourism destination’ through sustainability and climate change programs.

Product and Infrastructure Development

Grow destination appeal and deliver on the destination aspiration through the development of innovative tourism projects, including the Catalyst Projects identified in the Sunshine Coast Tourism Opportunity Plan:

- Convention, Exhibition and Performing Arts Centre
- Obi Obi Zipline Attraction
- Stockland Park Regional Sports Complex
- Attractions and Adventure Park Precinct
- Hinterland Eco Lodge
- Hinterland nature based tourism drive route, trails and attractions
- Coastal Green Trails including the Great Walks and the
- Coastal Pathway
- Rainbow Beach Eco Resort
- Noosa Biosphere Reserve and Sustainability Initiatives
- Tourism Precinct Master Planning, including:
  1. Hastings Street redevelopment and implementation of the Noosa Integrated Transport Plan
  2. Maroochydore Town Centre redevelopment
  3. Redevelopment of Caloundra Central District precinct – implementation of Bulcock Beach Frontage Master Plan
  4. Development of the Mooloolaba Spit
MARKET OPPORTUNITIES
Current Visitor Profile

Visitors

This past year (YE March 2014), Sunshine Coast tourism region received approximately 2.7 million domestic overnight and close to 5.3 million domestic day trip visitors. This represents a 5% increase in domestic overnights and a 6% increase in day trips over a five year average.

The very competitive interstate market is up 1% from last year, but shows little change when compared to the recent 5 year trend.

In terms of international visitors, the Sunshine Coast tourism region saw 225,070 international visitors this past year (YE March 2014), noting a year on year decline of 3% and a significant 21% decline in visitation when compared to the most recent 5 year average (Note: visitors arriving on direct flights from New Zealand, are NOT included in survey results and thus visitation numbers are understated.)

Visitor Nights

In the Year Ending March 2014, there were almost 10 million domestic overnight visitor nights in the region and 2.6 million international visitor nights. These represent a 12% decrease in domestic and 2% decrease in international nights when compared with the most recent 5 year average.

Origin of Visitors

Domestic overnight visitors are primarily intrastate (76%), with a relatively consistent share (last 3 years) of these originating from Brisbane 60%. Approximately 54% of interstate overnight visitors (trips) arrive from Sydney or Melbourne, with a recent decline in the Victorian market offset by growth in visitors from NSW.

Virtually all domestic day trip visitors are from intrastate, with 56% arriving from Brisbane.

The top three international visitor markets for the region are New Zealand, United Kingdom, and Germany (Table 4). It is anticipated that the United Kingdom will take over from New Zealand as the top international market by 2020.

Table 4: International Markets to the Sunshine Coast Tourism Region

<table>
<thead>
<tr>
<th>Country of Residence</th>
<th>% of Int. Visitors to Sunshine Coast</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Zealand</td>
<td>24.1%</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>21.5%</td>
</tr>
<tr>
<td>Germany</td>
<td>10.3%</td>
</tr>
<tr>
<td>USA (incl. Hawaii)</td>
<td>5.4%</td>
</tr>
<tr>
<td>Scandinavia</td>
<td>4.9%</td>
</tr>
<tr>
<td>Other Countries</td>
<td>33.8%</td>
</tr>
</tbody>
</table>

Purpose of Visit

The primary purpose of visit for both domestic overnight and international visitors is holiday (at its highest share in the last 5 years), followed by visiting friends and relatives (VFR).

Expenditure

All other countries have been combined due to low sample sizes.

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20 TRA March year end data

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According to the latest research from Tourism Research Australia\textsuperscript{22}, average nightly expenditure in the region for \textit{domestic overnight} visitors is \textdollar190 and \textdollar71 for \textit{international visitors}. The Domestic spend per night is \textit{higher than the State average} of \textdollar187 whilst the international result is \textbf{significantly below the \$86 State equivalent} international average spend per night.

\textbf{Average Length of Stay}

The average length of stay (ALOS) for \textit{domestic} overnight visitors to the Sunshine Coast tourism region is \textbf{3.75 days} (YE March 2014) \textsuperscript{a}. This is a strong result when compared with Brisbane (3 days) Fraser Coast (3.6 days) and Bundaberg (3.1 days), however the region’s performance remains lower than the State average (4.2 days) and competitors such as the Gold Coast (4 days), Tropical North Queensland (5.3 days) and Whitsundays (4.3 days)

\textit{Figure 7: Domestic ALOS vs. Competitors}

<table>
<thead>
<tr>
<th>Region</th>
<th>ALOS 2013-2020 (days)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sunshine Coast</td>
<td>3.75</td>
</tr>
<tr>
<td>Brisbane</td>
<td>3</td>
</tr>
<tr>
<td>Bundaberg</td>
<td>3.6</td>
</tr>
<tr>
<td>Fraser Coast</td>
<td>3.1</td>
</tr>
<tr>
<td>Gold Coast</td>
<td>4.2</td>
</tr>
<tr>
<td>Tropical North Queens</td>
<td>5.3</td>
</tr>
<tr>
<td>Whitsundays</td>
<td>4.9</td>
</tr>
<tr>
<td>Queensland</td>
<td>4.3</td>
</tr>
</tbody>
</table>

The region’s \textit{International} ALOS is \textbf{11.5 days}, a significant increase from the 9.3 days averaged over the last 5 years. When compared to primary competitors this is above average - Gold Coast (10.7 days), Tropical North Queensland (8.9 days), Fraser Coast (4.9 days) and Whitsundays (6.6 days)

\textbf{Seasonality}

Accommodation data from the Australian Bureau of Statistics (ABS) for the region indicates a mild seasonality pattern in room nights occupied. \textbf{September and December quarters are the most occupied}, indicating a possible preference for travel during the warmer months and/or during school holidays.

\textit{Figure 8} below shows the five year average of room nights occupied for the region.

\textbf{Activities}

\textit{Eating out at restaurants} is the most popular activity for domestic overnight and international visitors to the region. This is followed by going to the beach, then visiting friends and family for domestic visitors and going sightseeing for international visitors.

Australia ranks 2\textsuperscript{nd} in the world for its food tourism behind France and above Italy, making it an important niche for growth in the Sunshine Coast tourism region.

Data also suggests \textbf{recent growth in nature-based activities} in markets, including visiting national parks, bushwalking, fishing, snorkelling and surfing.

The following figures highlight the top fifteen (domestic visitors) and ten (international visitors) activities for each market once they have arrived in the destination\textsuperscript{23}.

\begin{figure}
\centering
\includegraphics[width=\textwidth]{average_length_of_stay.png}
\caption{Average Length of Stay}
\end{figure}

\begin{figure}
\centering
\includegraphics[width=\textwidth]{room_nightsOccupied.png}
\caption{Average Room Nights Occupied 2008-2012}
\end{figure}

\textsuperscript{22} TRA 2014 year ended March

\textsuperscript{23} As opposed to motivators to travel to the destination.
Figure 9: Top 15 Domestic Overnight Activities (YE March 2014)

- Eat out at restaurants
- Go to the beach (including swimming)
- Visit friends and relatives
- Go shopping (pleasure)
- General sight seeing
- Pubs clubs discos etc
- Going to markets
- Bushwalking or rainforest walks
- Visit national parks or State parks
- Picnics or BBQs
- Go fishing
- Go on a daytrip to another place
- Water activities or sports
- Exercise, gym or swimming at a local pool, river or creek
- Surfing

Figure 10: Top 15 International Activities (YE March 2014)

- Eat out / dine at a restaurant and/or cafe
- Go to the beach
- Sightseeing/looking around
- Go shopping for pleasure
- Visit national parks / state parks
- Pubs, clubs, discos etc
- Go to markets
- Bushwalking / rainforest walks
- Visit wildlife parks / zoos / aquariums
- Visit botanical or other public gardens
- Charter boat / cruise / ferry
- Go on guided tours or excursions
- Snorkelling
- Visit museums or art galleries
- Visit history / heritage buildings, sites or monuments
Market Opportunities

**Primary**

**Event Tourism** (including Business, Leisure and Sporting Events) is a growing trend nationally, with business events being the highest daily yield of any sector of the visitor economy. With less than 5% of visitors travelling to the region for events, there is potential to grow as well as provide the perfect opportunity for mid-week visitation and dispersal.

**Interstate Fly/Drive Visitors** from Sydney and Melbourne are a key market opportunity when considering 24% of all domestic overnight visitors and 39% of all domestic visitor nights are from interstate visitors. A small increase in the number of visitors or length of stay by interstate visitors could dramatically impact on the value of the visitor economy.

**Secondary**

**Nature-based Tourism** is gaining interest across Australia and currently makes up 20% of all visitors to the Sunshine Coast tourism region. Leveraging new experiences through partnerships such as Australia’s Nature Coast could be a significant growth potential for the region, specifically in international markets such as the UK, Europe and the USA.

**Niche markets** including golf, adventure and wellness tourism represent opportunities for growth from a low base. In 2014 less than 5% of all domestic and international visitors came to the region for golf, adventure or wellness activities.

**Drive Tourism** accounts for 93% of all domestic visitors to the region. Road infrastructure improvements could help to increase access and dispersal within the region and grow the day trip and short break markets out of Brisbane.

**Long Stay Visitors** (who stay over 21 days) are primarily comprised of seniors/ grey nomads. There has been a rapid nation-wide growth trend in this market over the past five years as the baby boomer generation is beginning to retire and purchase caravans to explore the country. Proper investment such as increased capacity in caravan parks could increase average length of stay in the region.

**Other Emerging Market Opportunities**

**Travel for a Purpose** is an often overlooked market segment, but the Sunshine Coast tourism region attracts around 1% of domestic overnight visitors for either health or education travel. With proper investment in both areas, this could be a growth potential for the region and could provide an opportunity to increase mid-week visitation.

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**Building Awareness** is vital to growing numbers. Estimates from Tourism and Events Queensland suggest that the Sunshine Coast tourism region:

- converts one in eight individuals who are considering travelling to the region;
- needs to generate approximately $500,000 in positive messages to create an additional percentage in consideration; and
- needs approximately $4M in value to gain a 1% shift in visitation from awareness.
Market Segments

International

Tourism Australia (TA) has defined its international target market as the ‘Experience Seeker’ who are globe trotters looking for authentic interactions, brag-able locations to get off the beaten track and to immerse themselves in local culture. Experience Seekers are Australia’s highest yielding international market and are more likely to increase their length of stay and average spend in comparison to others.

To promote the vast array of unique Australian adventures to this target market, seven key Australian Experience Themes have been identified:
1. Nature in Australia
2. Aboriginal Australia
3. Journeys
4. Outback Australia
5. Australian Coastal Lifestyle
6. Australian Major Cities
7. Food & Wine

The Sunshine Coast tourism region offers experiences that deliver five of the seven experience themes (not Outback Australia or Australian Major Cities).

defined seven market segments based on visitor needs and wants giving valuable insight into consumers’ emotional connection to what they expect from a holiday.

These market segments are seeking experiences that Queensland can offer under the following experience themes:
1. Natural Encounters
2. Queensland Lifestyle
3. Adventure
4. Islands and Beaches
5. Australian Coastal Lifestyle
6. Australian Major Cities
7. Food & Wine

The Sunshine Coast tourism region offers experiences that deliver six of the seven experience themes (not Australian Major Cities).

Connectors and Unwinders are Queensland’s two primary target markets and when combined, they represent 47% of the Australian population.

Connectors - Connectors see holidays a chance to connect with people they care most about. They will often subordinate their own preferences in terms of activities to ensure everyone has a good time.

Unwinders - Holidays are all about relaxation and release, focusing on themselves as an escape from their busy lives. This allows them to catch their breath, feel calm and peaceful and gain perspective.

Domestic

Tourism and Events Queensland’s (TEQ) extensive research into the domestic market has

SUNSHINE COAST TOURISM REGION TARGET MARKETS

Tier One
Connectors in Regional Queensland and Brisbane (400km radius of the Sunshine Coast tourism region); Connectors in Melbourne and Sydney; and New Zealand and United Kingdom.

Tier Two
Unwinders in Sydney and Melbourne; and Germany, Scandinavia, France, Netherlands, Switzerland, North America, China, Singapore, Malaysia and Indonesia.

Tier Three
Hong Kong, India and Korea.

New and Developing
Taiwan.
TOWARDS 2020
Vision and Goals

Our Vision
The 2020 Destination Vision for the Sunshine Coast tourism region is:

**By 2020 the Sunshine Coast tourism region will be globally recognised as Australia’s premier revitalising holiday destination where the blend of coastal and hinterland experiences showcase the region’s contemporary beach culture.**

Our Goals

1. **Extend day & one night stays** to grow the advantage with a focus on celebrating sunrise, healthy lifestyle and living the dream. Put a huge focus into events that drive overnight visitation in the off-peak.

2. **Create new immersive experiences** and events that attract new niche market segments:
   - *Nature-lovers*: Glass House Mountains, 2 Biospheres & lots of NPs, Waterways and recognising ‘green’ operators
   - *Cultural travellers*: Link natural advantage with indigenous stories,
   - *Gourmet travellers*: food and the markets
   - Adventure-seekers
   - Business event incentive packages

3. **Increase activity through the use of digital media database marketing / sharing**

4. **Encourage visitors to explore & connect** with better inter and intra-regional access & transport:
   - Linking attractions
   - 5 iconic photo moments with great stories
   - Show how close things are
   - Fully connective region online / mobile

Beyond 2020:
   - Unclog the Bruce Highway
   - Linking attractions
   - Link to Cairns and North Queensland to get more flights
   - New runway & terminal

5. **Build community pride and service culture** e.g. *Welcome to Noosa*
   - Get ready for new markets, including Asia, with the right accommodation (trusted brands) and more operators targeting Asia (International ready)

**Key Performance Indicators**
- Accredited and resilient businesses
- Visitor satisfaction
- ATDW product listings
- Increasing share of event visitors
- Community support for tourism
- Increasing off-peak travel
- Increasing share of international visitors
- Increasing average length of stay
- Increasing repeat visitation
- Support growth of existing markets
What Does the Future Hold?

CSIRO and the Queensland Government recently identified seven megatrends that are likely to shape the Queensland Tourism sector to 2033. The publication, entitled *The Future of Tourism in Queensland* aims to help develop a dynamic, collaborative 20 year plan for the industry.

A megatrend is defined as:

“A substantial shift in environmental, economic, social, technological or political conditions that has major supply-side or demand-side impact on tourism in Queensland.”

The seven megatrends identified for Queensland are:

1. **The Orient Express**
   The world economy is shifting from west to east and north to south. This is creating new markets and new sources of competition.
   - Asia is increasingly making a greater contribution to global wealth creation.
   - Over a billion people in the Asian region will cross the income threshold to middle class over the coming 20 years.
   - Asia is a fast growing market – but it is not a homogenous consumer market.

   **Implications for the Sunshine Coast Tourism Region**
   Asian visitor numbers to the region have been consistent over the last 5 years, accounting for approximately 10% of the overseas visitors, compared to the Queensland average of 40%. In recent years, driven by expanded Asian air connectivity, major cities of Brisbane, Cairns and Gold Coast have recorded significant growth, especially in the China market. If the region is to grow its share of the rapidly expanding Asian visitor market, it must have a clear **Asian market strategy** including:
   - Investment in research to determine where the regions assets and hero experiences connect with Asian tourism consumer.
   - A strategic and well-resourced Asian route development plan that assesses expanded Asian air connectivity between the region and major Queensland ports of Brisbane, Cairns, Gold Coast and beyond to Sydney, Perth and Auckland.
   - A co-ordinated approach to regional relationships with major Asian stakeholders e.g. Investors and high net worth individuals.
   - A well-resourced Asia Business development program that builds the capacity of Tourism and related businesses (e.g. retail) to service the cultural needs of the Asian market.
   - High level advocacy and influencing partnerships across State and Federal government tourism and investment functions.

2. **A Natural Advantage**
   In a world where ecological habitats are disappearing the unique natural assets of Queensland will become a stronger drawcard.
   - Globally, climate change, poor management and urbanisation will continue to threaten biodiversity.
   - Around the world, the ability to connect with nature will become rarer and more expensive.
   - Queensland has rare and world heritage natural assets, and the means to preserve them.

   **Implications for the Sunshine Coast tourism region**
   - The region has strong assets in terms of its productive **hinterland, scenic reserves, national parks and coastal access**, providing opportunities to leverage increased visitation, expenditure and support for employment.
   - The natural icons of the Glass House Mountains, is complimented by beaches, national parks, a marine conservation area and two biospheres.

3. **Great Expectations**
   Tourists of the future will have expectations for authentic and personalised experiences often involving social interaction.
• People’s social media networks are a way for them to make personal connections when they travel.
• Consumers have access to increasing amounts of information in real time.
• Consumers are taking more control and seeking personal interaction.

**Implications for the Sunshine Coast tourism region**

• The region’s businesses have an opportunity to continue to build quality service and experiences.
• Expansion of the successful ‘Welcome to Noosa’ customer service program should be explored along with other best practice examples of customer service.
• Following a strong rating in both the Brand perception and Social Indicators surveys for 2013, the Sunshine Coast is in a very strong position to capture leadership status for excellence in destination branding, experience and social interaction.

4. **Bolts from the Blue**

Climate change and infectious disease outbreaks combined with safety concerns will have increased impact.
• Major events such as extreme weather, terrorism, political unrest, disease outbreaks and financial market fluctuations will continue to impact people’s travel choice.
• Different events will have positive and negative impacts for a destination.
• We can’t predict when they will occur or where.

**Implications for the Sunshine Coast tourism region**

• Businesses and tourism managers need to be aware of future trends in climate management, and ready to respond with imaginative marketing, packaging and pricing offers, should the region be impacted.
• The tourism industry and government regulators will need to work closely to ensure appropriate adaptive measures and responses are reflected in planning and development instruments (e.g. Planning scheme coastal development minimum height requirements).
• Businesses and destination managers need to be ‘disaster-ready’ and have resilience plans in place.
• All businesses should be familiar with the “Ready, Set Go” disaster recovery mobile application developed by the Federal government.

5. **Digital Whispers**

People are changing the way they access and trust information in an online world.
• Like the childhood game of “whispers”, as people relate their stories across digital audiences, they can take on a life of their own.
• People are increasing their networks of trusted peers who inform their travel choices.
• An operators’ digital presence and functionality is increasingly important.

**Implications for the Sunshine Coast tourism region**

• The region needs to embrace a multichannel approach to communication and promotion. This includes building business skills and capacity and delivering new virtual travel/experiences in the form of providing rich information.
• Tourism operators and the regions tourism organisations together, need to embrace the latest digital assets available and plan for future developments.
• Google has announced that the region is one of Australia’s most web-savvy towns. The eTown Awards are awarded to cities and regions whose small businesses make the best use of the internet to grow their business and to connect with their customers online. The region and tourism operators need to build on this marketable reputation.

6. **On the Move**

Humanity is increasingly mobile. Trade, business, events, education and healthcare are causing more people to travel further and more frequently.
• People are more mobile, encouraged by low cost airfares and reducing travel times.
• More Australians are travelling overseas.
• It’s about more than just leisure – Sectors like education, business and events are growth travel market.

Implications for the Sunshine Coast tourism region
• Maintaining air capacity is imperative to maximising the potential of this trend.
• The Council owned Airports need to continue the route expansion activities, to open new routes particularly if they wish to encourage Asian visitation.
• Opportunities to expedite the plans to extend the international capability of the Sunshine Coast Airport should be explored.

7. The Lucky Country
Australia and Queensland are increasingly wealthy, but expensive destinations gifted with cultural and demographic diversity.
• The profile of the domestic tourist is changing—working harder, more educated, wealthier, older, and with greater international connections.
• Queensland is a safe and friendly western destination.
• Queensland is an expensive destination in a region of emerging, low cost destinations.

Implications for the Sunshine Coast tourism region
• The need to compete on quality, experience and service will have implications for investment and development decisions and destination and business levels.
Destination 2020 Target

To help achieve Queensland’s 2020 target aspiration of doubling overnight expenditure to $30 billion, the Sunshine Coast tourism region will have to contribute approximately $3.9 billion towards the 2020 target. In order to do this, key market segments need to be harnessed to drive growth in the region.

Table 5 below identifies the market mix for the region and how these will play a role in achieving the 2020 target aspiration. Market figures are based on the Deloitte Access Economics forecasts for Queensland and the Sunshine Coast tourism region. They have been developed on the assumption that the region’s visitor markets will grow proportionately to State market forecasts, and will retain the region’s current market share. These figures include day visitors (see next page for explanation). Table 5 highlights the important role that growth in the international market will play in reaching the 2020 target.

Table 5: Key Market Segments Towards Achieving the 2020 Target

<table>
<thead>
<tr>
<th></th>
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</thead>
<tbody>
<tr>
<td>Intrastate</td>
<td>57%</td>
<td>47%</td>
<td>$328,597,638</td>
<td>2,122,512</td>
<td>$1,845,591,577</td>
</tr>
<tr>
<td>Interstate</td>
<td>36%</td>
<td>34%</td>
<td>$397,248,628</td>
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<tr>
<td>TOTAL DOMESTIC</td>
<td>92%</td>
<td>81%</td>
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<td>$3,201,346,266</td>
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<tr>
<td>New Zealand</td>
<td>1%</td>
<td>3%</td>
<td>$90,563,796</td>
<td>449,935</td>
<td>$126,771,765</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>1%</td>
<td>3%</td>
<td>$91,858,256</td>
<td>165,748</td>
<td>$128,583,759</td>
</tr>
<tr>
<td>Tier Two Markets</td>
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<td></td>
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<td></td>
</tr>
<tr>
<td>North America</td>
<td>1%</td>
<td>2%</td>
<td>$44,710,669</td>
<td>114,808</td>
<td>$62,586,273</td>
</tr>
<tr>
<td>Germany</td>
<td>1%</td>
<td>2%</td>
<td>$43,741,496</td>
<td>44,388</td>
<td>$61,229,618</td>
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<tr>
<td>France</td>
<td>0.3%</td>
<td>1%</td>
<td>$20,303,391</td>
<td>15,232</td>
<td>$28,420,813</td>
</tr>
<tr>
<td>Netherlands</td>
<td>0.1%</td>
<td>0.2%</td>
<td>$6,478,180</td>
<td>827</td>
<td>$9,068,197</td>
</tr>
<tr>
<td>Switzerland</td>
<td>0.3%</td>
<td>1%</td>
<td>$17,888,362</td>
<td>89,675</td>
<td>$25,040,240</td>
</tr>
<tr>
<td>Asia</td>
<td>1%</td>
<td>3%</td>
<td>$86,047,067</td>
<td>151,140</td>
<td>$120,449,220</td>
</tr>
<tr>
<td>Remaining</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>International</td>
<td>2%</td>
<td>4%</td>
<td>$121,662,261</td>
<td>336,393</td>
<td>$170,303,591</td>
</tr>
<tr>
<td>TOTAL INTERNATIONAL</td>
<td>8%</td>
<td>19%</td>
<td>$523,253,477</td>
<td>1,368,147</td>
<td>$732,453,477</td>
</tr>
<tr>
<td>Total Visitors</td>
<td>100%</td>
<td>100%</td>
<td>$1,249,099,743</td>
<td>4,831,758</td>
<td>$3,933,799,743</td>
</tr>
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</table>

Figure 11: Destination 2020 Target

Average Spend per Night: $208.06
The Role of the Day Trip Market

As one of Australia’s most popular daytrip destinations, and the second most popular regional daytrip destination in Queensland, the Sunshine Coast’s day visitors play an important role in its future growth accounting for 15% of all of Queensland’s day trip visitors.

While the 2020 targets for Queensland exclude day visitors, for the Sunshine to achieve its goals – the daytrip market needs to be considered. As Figure 12 and Table 8 below indicate, without the day visitor market, the Sunshine Coast would need to secure an additional $550M from overnight visitors (comparing Forecast Additional Spend from Tables 5 and 6), equating to an extra $115 per visitor.

Figure 12: 2020 Expenditure Target Comparison Day Trips vs. No Day Trips

Table 8: Key Market Segments Towards Achieving the 2020 Target (excl. Day Trips)

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<td>$3,933,799,743</td>
</tr>
</tbody>
</table>

For the Sunshine Coast to meet its 2020 target it needs to include day visitors, but more than that, it needs to convert as many as possible to overnight stays.
## Destination Growth Priorities

The following priority strategies and supporting actions have been identified for the Sunshine Coast tourism region. These priorities take into consideration the seven market opportunities identified on page 29 that have the potential to grow to reach the Sunshine Coast’s 2020 target:

<table>
<thead>
<tr>
<th>Priority</th>
<th>Stakeholders</th>
<th>Timing</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Increase the use and build industry skills in digital marketing.</td>
<td>Lead: SCDL Support: RDASC/SCC/NSC/GRC/ DSDIP/TN</td>
<td>Immediate</td>
</tr>
<tr>
<td>• Increase focus on a digital mentoring program to help industry to embrace a multichannel approach to communication and promotion including building business skills and capacity and delivering new virtual travel/experiences in the form of providing rich information.</td>
<td>Lead: RDASC/DSDIP Support: SCC/NSC/GRC/ SCDL</td>
<td>Medium-term</td>
</tr>
<tr>
<td>• Lobby to lift the priority of the NBN rollout supporting improved high-speed broadband and providing the core infrastructure for improved mobile coverage.</td>
<td>Lead: SCC/NSC/GRC Support: SCDL/TN/DGR</td>
<td>Ongoing</td>
</tr>
<tr>
<td>• Create a culture of community pride and leverage local ambassadors through increasing the use of digital media database marketing / sharing.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Prepare a niche marketing and product development strategy and engage industry on opportunities.</td>
<td>Lead: SCDL Support: TN/DGR/ SCC/NSC/GRC/ DSDIP</td>
<td>Immediate</td>
</tr>
<tr>
<td>• Promote linkages to health and education with leisure including post-operative recuperation packages, international student and family packages etc.</td>
<td>Lead: Industry/SCC/NSC/GRC Support: QPWS/DSDIP/SCDL</td>
<td>Medium-term</td>
</tr>
<tr>
<td>• Create and promote new immersive experiences and events that leverage the region’s natural assets and attract new niche market segments including food, weddings, wellness, golf and adventure, including mountain biking.</td>
<td></td>
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</tr>
<tr>
<td>• Increased focus (human and dollar) on building the international capacity of regional products that are nature-based or aligned to the region’s natural assets, including promotion of itineraries that link these businesses to the region’s natural assets.</td>
<td>Lead: SCDL Support: TEQ/TN/DGR</td>
<td>Immediate</td>
</tr>
<tr>
<td>• Increase share of international visitors initially from Germany and UK and medium term from other European regions, Singapore, China and USA.</td>
<td>Lead: SCDL Support: ARAMA/ DSDIP</td>
<td>Ongoing</td>
</tr>
<tr>
<td>• Encourage operators and event organisers to embrace mid-week one night stays through mentoring in yield management.</td>
<td>Lead: Bes Support: SCDL</td>
<td>Immediate</td>
</tr>
<tr>
<td>• Target business events and conferences (including incentives) to maximise mid-week availability and encourage growth.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Undertake a major PR and content push for the destination using ambassadors including celebrity endorsements (leveraging well-known locals and investors) to build the brand.</td>
<td>Lead: SCDL Support: TN/DGR</td>
<td>Medium-term</td>
</tr>
<tr>
<td>• Make publicity a priority with investment in resources with expert knowledge and connections to take the message to market.</td>
<td>Lead: SCDL Support: TEQ/TN/DGR</td>
<td>Medium-term</td>
</tr>
<tr>
<td>• Support operators to find their unique selling point and a signature experience to feed the regions rich digital content strategy.</td>
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</tr>
</tbody>
</table>
5. **Support the development of new nature-based iconic experiences of the destination that provide a competitive advantage and use PR and future investment to grow our advantage.**

- Increase resource (human and dollar) to lead the **regional approach to creating new iconic experiences and delivering new catalyst hero projects** that are grounded in the Sunshine Coast tourism region’s natural assets.

- Work with QPWS to **prioritise investment in parks’ infrastructure** where it delivers a maximum return to the visitor economy. Priorities will be considered as part of the QPWS State-wide Capital Works program.

- Gain high-level planning support for the private development of **iconic facilities on public or private land** at both the Glasshouse Mountains and Rainbow Beach as gateways to the region’s iconic landscape.

- Implement a **major PR campaign to raise awareness** of the region’s iconic natural experiences both interstate and internationally through **Australia’s Nature Coast** including rich digital content.

<table>
<thead>
<tr>
<th>Stakeholders</th>
<th>Timing</th>
</tr>
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<tbody>
<tr>
<td>Lead: SCDL</td>
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<tr>
<td>Lead: QPWS/SCDL/TEQ/SCC/ Support: NSC/GRC/DSDIP</td>
<td>Medium-term</td>
</tr>
<tr>
<td>Lead: QPWS/GRC/SCC/ Support: DSDIP</td>
<td>Medium-term</td>
</tr>
<tr>
<td>Lead: SCDL Support: DGR/NSC/SCC/GRC</td>
<td>Ongoing</td>
</tr>
</tbody>
</table>

6. **Increase investment in interstate (Sydney / Melbourne) marketing of packages and itineraries to increase average length of stay.**

- Increase focus on investment in **interstate marketing**.

- Focus more effort on **interstate fly/drive markets** with packages and itineraries.

<table>
<thead>
<tr>
<th>Stakeholders</th>
<th>Timing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lead: SCDL Support: TEQ</td>
<td>Immediate</td>
</tr>
<tr>
<td>Lead: SCDL Support: TN/DGR</td>
<td>Medium-term</td>
</tr>
</tbody>
</table>

7. **Increase air access and route development activity to better attract international and regional markets.**

- Support existing **route development proposals** to airlines by the Sunshine Coast Airport with marketing and other incentives to attract direct services from New Zealand and indirect services via other destinations to grow our share of the New Zealand and Asian markets.

- Reinforce existing Sunshine Coast Airport route development proposals (including airline incentives) by providing marketing support that will help establish and maintain the route’s commercial viability once they have been secured.

- Explore opportunities to **extend the international capability of the Sunshine Coast Airport** including development and expansion of the Sunshine Coast Airport/Precinct (new runway and airport terminal).

- Develop new **route development and marketing packages** to attract regional air services into the region from destinations including Adelaide, Mackay, Canberra and Darwin.

- Seek financial support for **increased bus and public transport** between Brisbane Airport and the region for those markets landing in Brisbane.

<table>
<thead>
<tr>
<th>Stakeholders</th>
<th>Timing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lead SCDL/TEQ Support: SCC</td>
<td>Medium-Term</td>
</tr>
<tr>
<td>Lead: SCDL Support: SCC</td>
<td>Medium-Term</td>
</tr>
<tr>
<td>Lead: SCC</td>
<td>Long-Term</td>
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<tr>
<td>Lead: SCC Support: SCDL</td>
<td>Medium-term</td>
</tr>
<tr>
<td>Lead: SCC Support: NSC/GRC</td>
<td>Ongoing</td>
</tr>
</tbody>
</table>

8. **As a region, proactively support the growth of signature events and the acquisition of new events across the Sunshine Coast tourism region.**

- Councils to work towards **increasing their investment in events acquisition** to allow increased attraction of new events in each region of the Sunshine Coast across all Councils.

- **Incentivise events that build visitation** in the low season and mid-week.

<table>
<thead>
<tr>
<th>Stakeholders</th>
<th>Timing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lead: SCC/NSC/GRC Support: SCDL/TN/DGR</td>
<td>Immediate</td>
</tr>
<tr>
<td>Lead: SCC/NSC/GRC Support: SCDL/TN/DGR</td>
<td>Immediate</td>
</tr>
<tr>
<td>Priority</td>
<td>Stakeholders</td>
</tr>
<tr>
<td>----------</td>
<td>--------------</td>
</tr>
<tr>
<td>• Increase focus on events resourcing (human and dollar) to mentor and leverage events such as Asia-ready events and events that build the region’s competitive advantage including beach, sport, food, arts and culture.</td>
<td>Lead: SCC/NSC/GRC&lt;br&gt;Support: SCDL/TN/DGR</td>
</tr>
<tr>
<td>• Create leads for business events through leveraging event partners and sponsors, and ensuring our contracts recognise this.</td>
<td>Lead: SCC/NSC/GRC&lt;br&gt;Support: SCDL</td>
</tr>
<tr>
<td>• Councils to work towards embracing a more conciliatory approach to permitting arrangements, with a view to enabling and encouraging events on the beach (or other reserves/parks).</td>
<td>Lead: SCC/NSC/GRC&lt;br&gt;Support: SCDL</td>
</tr>
<tr>
<td>• Develop a PR campaign to community to demonstrate the value to the industry of operator support of event packaging.</td>
<td>Lead: SCDL&lt;br&gt;Support: TN/DGR</td>
</tr>
</tbody>
</table>

9. Grow Business Events to support new infrastructure including a Convention Centre and branded hotels.

- Invest more resource (human and dollar) in the region’s Convention Bureau to secure more business events in the corporate and associations’ market.
- Provide bid incentives for high value events.
- Work with QPWS and Councils to identify, invest in and promote locations suitable for hosting off-site business events and incentives.
- Mentor local businesses to better engage with the business events market and package experiences including local food and wine, and pre-and post-touring.
- Expand opportunities for the development of more events/conference/meeting venues including the potential for a cultural precinct and convention centre in Maroochydore.

- **Lead: BESC**<br>- **Lead: SCC/NSC/GRC/ RDASC**

10. Increase road access through improvements to the Bruce Highway.

- Work with the State Government and the Freight sector to lobby the Federal Government to increase the priority of the Bruce Highway upgrade.
- Seeking incentives or subsidies to improve inter and intra-regional public transport.

- **Lead: SCC/NSC/GRC /RDASC**

<table>
<thead>
<tr>
<th>Partner Acronyms</th>
<th>Timing</th>
</tr>
</thead>
<tbody>
<tr>
<td>ANC Australia’s Nature Coast</td>
<td>Immediate (1-2 years)</td>
</tr>
<tr>
<td>ARAMA Australian Resident Accommodation Managers Association</td>
<td>Medium-term (3-5 years)</td>
</tr>
<tr>
<td>ATDW Australian Tourism Data Warehouse</td>
<td>Long-term (beyond 2020)</td>
</tr>
<tr>
<td>CBV Convention Bureau</td>
<td>Ongoing (to 2030)</td>
</tr>
<tr>
<td>DGR Destination Gympie Region</td>
<td></td>
</tr>
<tr>
<td>DSDIP Department of State Development Infrastructure and Planning</td>
<td></td>
</tr>
<tr>
<td>DTMR Department of Transport and Main Roads</td>
<td></td>
</tr>
<tr>
<td>GRC Gympie Regional Council</td>
<td></td>
</tr>
<tr>
<td>NSC Noosa Shire Council</td>
<td></td>
</tr>
<tr>
<td>QPWS Queensland Parks and Wildlife Service</td>
<td></td>
</tr>
<tr>
<td>RDASC Regional Development Australia Sunshine Coast</td>
<td></td>
</tr>
<tr>
<td>SCC Sunshine Coast Council</td>
<td></td>
</tr>
<tr>
<td>SCDL Sunshine Coast Destination Limited</td>
<td></td>
</tr>
<tr>
<td>TEQ Tourism and Events Queensland</td>
<td></td>
</tr>
<tr>
<td>TN Tourism Noosa</td>
<td></td>
</tr>
</tbody>
</table>
### Contribution of Strategies to the 2020 Target

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Increase the use and build industry skills in digital marketing.</td>
<td>1% of Brisbane leisure visitors will increase their average length of stay by 1/5 day.</td>
<td>19%</td>
<td>$105,022,282</td>
<td>$649,825,598</td>
<td>17%</td>
</tr>
<tr>
<td>2. Prepare a niche marketing and product development strategy and engage industry on opportunities.</td>
<td>Increase share of Queensland market by 1%.</td>
<td>23%</td>
<td>$101,287,193</td>
<td>$324,991,485</td>
<td>8%</td>
</tr>
<tr>
<td>3. Invest in industry education and participation to build mid-week visitation (through Business Events and international readiness).</td>
<td>Increase share of Queensland market by 1%.</td>
<td>15%</td>
<td>$145,416,034</td>
<td>$299,229,352</td>
<td>8%</td>
</tr>
<tr>
<td>4. Undertake a major PR and content push for the destination using ambassadors including celebrity endorsements (leveraging well-known locals and investors) to build the brand.</td>
<td>Increase share of Queensland market by 1%.</td>
<td>12%</td>
<td>$81,585,770</td>
<td>$236,265,220</td>
<td>6%</td>
</tr>
<tr>
<td>5. Support the development of new nature-based iconic experiences of the destination that provide a competitive advantage and use PR and future investment to grow our advantage.</td>
<td>Increase share of Queensland market by 1%.</td>
<td>25%</td>
<td>$72,458,071</td>
<td>$234,047,288</td>
<td>6%</td>
</tr>
<tr>
<td>6. Increase investment in interstate (Sydney/Melbourne) marketing of packages and itineraries to increase average length of stay.</td>
<td>Increase share of Queensland market by 2%.</td>
<td>16%</td>
<td>$79,633,746</td>
<td>$218,717,501</td>
<td>6%</td>
</tr>
<tr>
<td>7. Increase air access and route development activity to better attract international and regional markets.</td>
<td>Increase share of Queensland NZ and Asia markets by 2%.</td>
<td>6%</td>
<td>$115,176,108</td>
<td>$187,880,631</td>
<td>5%</td>
</tr>
<tr>
<td>8. As a region, proactively retain, maintain and gain major events across the Sunshine Coast tourism region.</td>
<td>Increase share of Queensland market by 6%.</td>
<td>11%</td>
<td>$56,242,154</td>
<td>$104,684,954</td>
<td>3%</td>
</tr>
<tr>
<td>9. Grow Business Events to support new infrastructure including a Convention Centre and branded hotels.</td>
<td>Increase share of Queensland market by 5%.</td>
<td>13%</td>
<td>$14,335,113</td>
<td>$28,738,609</td>
<td>1%</td>
</tr>
<tr>
<td>10. Increase road access through improvements to the Bruce Highway.</td>
<td>Increase share of Queensland daytrip drive market by 1% per annum.</td>
<td>15%</td>
<td>$256,637,929</td>
<td>$776,085,781</td>
<td>20%</td>
</tr>
<tr>
<td>TOTAL CONTRIBUTION TO 2020 TARGET</td>
<td>$1,027,794,401</td>
<td></td>
<td>$3,060,476,420</td>
<td>77%</td>
<td></td>
</tr>
<tr>
<td>ACTUAL 2020 TARGET</td>
<td>$3,933,799,743</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SHORTFALL</td>
<td>$873,323,323</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
To assist in making up the $873M shortfall of the region’s 2020 target, an additional four strategies have been developed for consideration:

<table>
<thead>
<tr>
<th>Priority</th>
<th>2020 Growth Strategy</th>
<th>Additional Visitors</th>
<th>Additional Nights</th>
<th>Contribution to 2020 Target</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Support a whole-of-Australia marketing push to grow existing and emerging visitor markets and average length of stay.</td>
<td>A whole of Australia marketing push brings in an additional $320M</td>
<td>298,827</td>
<td>1,300,372</td>
</tr>
<tr>
<td>2.</td>
<td>Collaborate on the development of a new Sporting Stadium to attract major national and international sporting events.</td>
<td>New Sports Stadium facilities bring in an additional $300M</td>
<td>425,594</td>
<td>1,219,000</td>
</tr>
<tr>
<td>3.</td>
<td>Collaborate on the development of a new Conference Centre to bid and attract major business and cultural events to the region.</td>
<td>New Conference Centre facilities bring in an additional $250M</td>
<td>348,924</td>
<td>1,015,916</td>
</tr>
<tr>
<td>4.</td>
<td>The tourism sector to partner with the freight sector and other destinations to build the case for bringing forward the investment in the Bruce Highway.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

TOTAL CONTRIBUTION TO 2020 TARGET | $870,000,000 | 24%
Implications of Growth

If the Sunshine Coast tourism region hits the 2020 growth target it will generate in excess of 3.2 million additional visitor nights with implications for:

**Access**

These significant visitor volumes will have implications for road congestion at peak times. At the Sunshine Coast Airport expanded route development that supports additional air access will result in increased infrastructure needs.

**Accommodation**

Based on the available data in the Australian Bureau of Statistics - Survey of Tourist Accommodation (2000-2013) for Hotels, Motels and Serviced Apartments, Figure 13 below shows the trend in room supply and demand for the Sunshine Coast tourism region over the past 7 years. The ‘Guest Nights’ figures from 2013-2020 are based on the Tourism Forecasting Committee (TFC) predicted growth rates in Domestic and International room nights in commercial accommodation for QLD (applied to the region).

The ‘Rooms Available’ is based on a forecasted maintenance of supply, with no provision for new room stock. The forecast visitor nights in commercial accommodation demand for the Sunshine Coast tourism region under TFC is estimated to grow at 1.6% per annum, at this rate the average room occupancy for the region reach 63% by 2020 based on current occupancy rates. When reaching the stretch target however, the occupancy rate increases 14% per annum to 120% by 2020.

Based on the stretched growth targets, the more than doubling of current room night demand, will require investment in new accommodation stock of at least 0.5 million room nights.

*Figure 13: Accommodation Room Supply and Demand*
Attractions
The projected increase in visitor numbers will need to be accommodated in National Park Management plans and Local Government Planning Schemes to support new attractions and visitor precincts (e.g. Mooloolaba, Hinterland, etc.).

Alongside visitor attractions, implementation of the Regional and Major Events Strategy will support a program of events over peak, shoulder and off seasons, providing new reasons to visit. Need for proactive promotion of development opportunities to unlock investment.

Other Infrastructure
A range of other infrastructure and services, from signage and public conveniences to town and coastal planning will need to respond to the growth.

A co-ordinated ‘whole of Sunshine Coast tourism region’ approach to destination planning and management is required in order to deliver a compelling set of experiences which entice new visitors and encourage repeat custom. A first step is engaging/ re-engaging partners and raising awareness of the projected tourism growth and its potential implications.

Community
In the 2013 Social Indicators survey the Sunshine Coast tourism region achieved a significant rise in the number of residents who want more tourists to come to the region (47% compared with 31% in 2010).

Tourism growth will at least in part be focused on certain locations and hotspots. Communities will need to be engaged in those areas as key delivery partners and stakeholders.

VFR will continue to be an important growth market – this is most effectively influenced by working at community level, building awareness of facilities and activities.

A friendly welcome is always an important part of the tourism experience. Communities will be stakeholders in delivering this welcome.

Destination Workforce
Research by Deloitte Access Economics indicates that the region’s tourism workforce is under pressure from other sectors and will experiences a short-fall under the TFC forecasts let alone the 2020 stretch targets.

Workforce development will be key determinant in helping Sunshine Coast tourism region stand out from the crowd and achieve its 2020 ambitions.
Challenges and Opportunities to Achieving the Vision

During the consultation process, the following challenges and opportunities were identified towards achieving the vision for the Sunshine Coast tourism region:

<table>
<thead>
<tr>
<th>TOP 5 CHALLENGES</th>
<th>TOP 5 OPPORTUNITIES</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Investment</strong>: achieving the 2020 target is one thing, doing so without compromising the values that make the destination special is another. Planned growth is needed to manage the estimated 3 million additional visitor nights across the region. This includes an additional 750 rooms (based on retaining a 75% occupancy rate) and obvious impacts on parking, road infrastructure and public place infrastructure (e.g. National Park day use areas, beaches, etc.).</td>
<td>Encourage visitors to stay another day to grow the advantage with a focus on celebrating sunrise, healthy lifestyle and living the dream. Put a huge focus into events that drive overnight visitation in the off-peak.</td>
</tr>
<tr>
<td><strong>Seasonality</strong>: key to managing the future growth is encouraging off-peak and mid-week business rather than driving more visitors to the already busy holiday and weekend periods. The target growth areas of events, niche and international provide a strong platform for this however more work is needed to operators and event organisers to master the art of the mid-week sell.</td>
<td>Create new immersive experiences and events that attract new niche market segments:</td>
</tr>
<tr>
<td><strong>Global uncertainty</strong>: if international markets to Queensland slump due to world events, the domestic market would essentially need to double to reach the 2020 target. This would require a significant investment in marketing.</td>
<td>Encourage visitors to explore and connect: with better inter and intra-regional access and transport:</td>
</tr>
<tr>
<td><strong>Access</strong>: air and road access continue to be a major driver of growth, the region needs to support the growth of the Sunshine Coast airport and continued road improvements to provide the platform for growth.</td>
<td>Leverage ambassadors: through increasing the use of digital media database marketing/sharing.</td>
</tr>
<tr>
<td><strong>Nature in harmony</strong>: with such accessible nature the future growth of the niche markets will depend on being able to access these spaces, ideally with a guide, requiring a review of permit allocations and infrastructure at focal point sites and where necessary investing in site hardening with lookouts, boat and canoe ramp and even accommodation in hero sites.</td>
<td>Build Community pride and service culture, for example Ipswich and Welcome to Noosa.</td>
</tr>
</tbody>
</table>

- **Nature-lovers**: Glass House Mountains, 2 Biospheres and an abundance of NPs, Waterways and recognising “green” operators;
- **Cultural travellers**: Link natural advantage with indigenous stories;
- **Gourmet travellers**: food and markets;
- **Adventure-seekers**;
- **Business event packages**.

- Encourage visitors to explore and connect: with better inter and intra-regional access and transport:
  - Unclog the Bruce highway;
  - Link attractions;
  - Link to Cairns in order to get more flights;
  - New runway and terminal;
  - 5 key photo opportunities with great stories;
  - Show how close things are; and
  - Completely connect the region online / mobile.

- Build Community pride and service culture, for example Ipswich and Welcome to Noosa.
  - Get ready for new markets, including Asia with the right accommodation (trusted brands) and more operators targeting Asia (International ready).
## Enablers of Success

<table>
<thead>
<tr>
<th>Enablers</th>
<th>Responsibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.1 Encourage investment in the Sunshine Coast Airport, including private sector investment, making improved air capacity to the region a high priority.</td>
<td>SCC/RDASC</td>
</tr>
<tr>
<td>4.2 By growing business events, assist in building a case for investment in an iconic convention centre, cultural centre and 4 branded/5 Star hotel as part of the Maroochydore CBD revitalisation (3,000 plus capacity).</td>
<td>SCDL/CVB/SRCR/NSC/GRC</td>
</tr>
<tr>
<td>4.3 Expand the <em>Welcome to Noosa Program</em> across the Sunshine Coast tourism region to improve customer service and product knowledge by frontline staff.</td>
<td>SCDL</td>
</tr>
<tr>
<td>4.4 Create a reward and recognition program using operator-led incentives for high performing staff giving them free or discounted access to the region’s best experiences.</td>
<td>SCDL/TN/DGR/Industry</td>
</tr>
<tr>
<td>4.5 Create a locals/VFR discount program to encourage repeat visitation.</td>
<td>Industry</td>
</tr>
<tr>
<td>4.6 Increase investor awareness of the existing support and incentives in place to attract investors to the Sunshine Coast tourism region, and work with Councils to ensure the planning schemes act as enablers of suitable tourism investment.</td>
<td>SCDL/SCC/NSC/GRC</td>
</tr>
<tr>
<td>4.7 In partnership, build the case for the duplication of the current rail line to Landsborough with benefits for both freight and passenger movement (including visitors).</td>
<td>SCC/NSC/GRC/DTMR/RDASC</td>
</tr>
<tr>
<td>4.8 Work in partnership with QTIC to improve the competitiveness of the tourism industry by advocating for workplace relations reform that recognises the tourism industry as a 7 days a week, 24 hours a day industry. Consider multiple locations within the Sunshine Coast tourism region as key tourism precincts and allow for more flexible and competitive workplace employment agreements.</td>
<td>QTIC/SCDL/NSC/GRC</td>
</tr>
<tr>
<td>4.9 Where relevant, implement the outcomes of the Drive Tourism Strategy and Camping Options review at a regional level to maximise the value of the touring and long-haul drive markets.</td>
<td>SCC/NSC/GRC/SCDL</td>
</tr>
</tbody>
</table>
DESTINATION STRATEGIES
Strategic Directions

The following section identified the destination strategies required to help achieve the 2020 target for the Sunshine Coast tourism region. Within each, a series of actions have been established as a means of delivering the identified destination strategies.

Each of the strategies have been prepared around 6 key themes that were developed in the Tourism 2020 Strategy which will enable destinations such as the Sunshine Coast tourism region to develop products and experiences in line with their hero experiences.

<table>
<thead>
<tr>
<th>Partner Acronyms</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ATDW</td>
<td>Australian Tourism Data Warehouse</td>
</tr>
<tr>
<td>BESC</td>
<td>Business Events Sunshine Coast</td>
</tr>
<tr>
<td>DGR</td>
<td>Destination Gympie Region</td>
</tr>
<tr>
<td>DSDIP</td>
<td>Department of State Development, Infrastructure and Planning</td>
</tr>
<tr>
<td>DTESB</td>
<td>Department of Tourism, Major Events, Small Business and the Commonwealth Games</td>
</tr>
<tr>
<td>DTMR</td>
<td>Department of Transport and Main Roads</td>
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<tr>
<td>GRC</td>
<td>Gympie Regional Council</td>
</tr>
<tr>
<td>NSC</td>
<td>Noosa Shire Council</td>
</tr>
<tr>
<td>QPWS</td>
<td>Queensland Parks and Wildlife Service</td>
</tr>
<tr>
<td>QTIC</td>
<td>Queensland Tourism Industry Council</td>
</tr>
<tr>
<td>RDASC</td>
<td>Regional Development Australia Sunshine Coast</td>
</tr>
<tr>
<td>SCC</td>
<td>Sunshine Coast Council</td>
</tr>
<tr>
<td>SCDL</td>
<td>Sunshine Coast Destination Limited</td>
</tr>
<tr>
<td>TEQ</td>
<td>Tourism and Events Queensland</td>
</tr>
<tr>
<td>TN</td>
<td>Tourism Noosa</td>
</tr>
</tbody>
</table>

Timing

Immediate (1-2 years)
Medium-term (3-5 years)
Long-term (beyond 2020)
Ongoing (to 2030)
### 1. Preserve the Region’s Nature and Culture

Our unique, authentic character, cultural heritage and natural assets will be preserved and enhanced for visitors and locals alike, and will always be at the heart of iconic showcase Queensland experiences.

<table>
<thead>
<tr>
<th>PRODUCT</th>
<th>STAKEHOLDERS</th>
<th>TIMING</th>
<th>MARKET</th>
<th>KPI/TARGET</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1 Support the delivery of a diverse range of tourism products and activities including ecotourism, adventure and family product to cater for existing and emerging markets through mentoring and support programs.</td>
<td>Lead: SCDL Support: SCC, NSC, GRC</td>
<td>Immediate</td>
<td>All</td>
<td>New products on ATDW</td>
</tr>
<tr>
<td>1.2 Build on the destinations strong natural attractions with the development of appropriate nature based facilities and activities such as lookouts and boat ramps identified through a future demand study on key sites.</td>
<td>Lead: SCC, NSC, GRC Support: QPWS</td>
<td>Medium-Term</td>
<td>Niche</td>
<td>New products on ATDW</td>
</tr>
<tr>
<td>1.3 Support the creation of immersive experiences and events that leverage the regions natural assets and attract new niche market segments. These could include Glass House Mountains, Two Biospheres, National Parks and Waterways / Wilderness.</td>
<td>Lead: SCC, NSC, GRC Support: SCDL, QPWS, TEQ</td>
<td>Medium-Term</td>
<td>Niche Events</td>
<td>New products on ATDW</td>
</tr>
<tr>
<td>1.4 Support the creation of immersive experiences that leverage the regions cultural assets. These could include Indigenous, Creative, Sporting, Beach experiences and food and markets.</td>
<td>Lead: SCC, NSC, GRC Support: SCDL, TEQ</td>
<td>Medium-Term</td>
<td>All</td>
<td>New products on ATDW</td>
</tr>
<tr>
<td>1.5 Identify the region’s five iconic photo locations across the beaches, hinterland, cultural and natural locations and if required investigate future infrastructure needs to meet forecast demand.</td>
<td>Lead: SCDL Support: SCC, NSC, GRC, QPWS, TEQ</td>
<td>Immediate</td>
<td>All</td>
<td>New products on ATDW</td>
</tr>
<tr>
<td>1.6 Support the re-opening of the heritage rail experiences including the Mary Valley Rattler and the Nambour to Coolum tram trail.</td>
<td>Lead: GRC and SCC respectively Support: SCDL, DGR</td>
<td>Medium-Term</td>
<td>Niche VFR</td>
<td>New products on ATDW</td>
</tr>
<tr>
<td>1.7 Develop and promote ‘Great Beach Drive’ as the world’s longest beach drive.</td>
<td>Lead: SCDL Support: DGR, TN, TEQ</td>
<td>Medium-Term</td>
<td>Drive</td>
<td>New products on ATDW</td>
</tr>
<tr>
<td>PRODUCT</td>
<td>STAKEHOLDERS</td>
<td>TIMING</td>
<td>MARKET</td>
<td>KPI/TARGET</td>
</tr>
<tr>
<td>---------</td>
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<td>------------</td>
</tr>
<tr>
<td>1.8</td>
<td>Target growth in and publicity for new Adventure experiences that showcase the natural environment (e.g. Obi Obi zipline).</td>
<td>Lead: SCDL Support: SCC, QPWS, TEQ, DTESB</td>
<td>Immediate</td>
<td>Niche</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>MARKETING</th>
<th>STAKEHOLDERS</th>
<th>TIMING</th>
<th>MARKET</th>
<th>KPI/TARGET</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.9</td>
<td>Position the Sunshine Coast tourism region as a world leader in sustainable tourism through a regional accreditation program linked to National Parks and the Biospheres.</td>
<td>Lead: QTIC Support: SCDL, TN, DGR</td>
<td>International (Medium-Term) Domestic (Long-Term)</td>
<td>All</td>
</tr>
<tr>
<td>1.10</td>
<td>Maintain the region’s point of difference in comparison to the Gold Coast and other beach destinations through tourism and community oriented planning and design and retaining the village feel.</td>
<td>Lead: SCDL Support: SCC, NSC, GRC, TN, DGR</td>
<td>Long-Term</td>
<td>All</td>
</tr>
</tbody>
</table>
2. **Offer Iconic Experiences**

Our destinations will build on and leverage their strengths and heroes - iconic people, places and events which are our points of difference - giving visitors life-long memories and many reasons to stay, explore and return.

<table>
<thead>
<tr>
<th>PRODUCTS</th>
<th>STAKEHOLDERS</th>
<th>TIMING</th>
<th>MARKETS</th>
<th>KPI/TARGET</th>
</tr>
</thead>
</table>
| 2.1 Implement the recommendations of the Sunshine Coast Major Events Strategy with a focus on participation sports, niche events and lifestyle events. | Lead: SCC  
Support: SCDL, TEQ | Medium-Term | Events | Increase share of event visitors |
| 2.2 Mentor and support operators to deliver more morning focused tours and experiences to celebrate sunrise. | Lead: SCDL  
Support: TN, DGR, DTESB | Immediate | All | New products on ATDW |
| 2.3 Support businesses seeking to create opportunities for exploring and discovering Indigenous culture throughout the Glass House Mountains and the rest of the Sunshine Coast tourism region. | Lead: SCDL  
Support: TN, DGR, DTESB | Immediate | All | New products on ATDW |
| 2.4 Identify and seek agreement on new walking and multi-use trails through the Glass House Mountains (e.g. Trail running, mountain biking, horse riding). | Lead: QPWS, DTSEB  
Support: SCDL | Immediate | Niche | Increase share of niche markets |
| 2.5 Through the newly formed Major Events Board, target major event growth and acquisition. | Lead: SCC  
Support: SCDL | Immediate | Events | Increase share of event visitors |

<table>
<thead>
<tr>
<th>MARKETING</th>
<th>STAKEHOLDERS</th>
<th>TIMING</th>
<th>MARKETS</th>
<th>KPI/TARGET</th>
</tr>
</thead>
</table>
| 2.6 Position the Sunshine Coast tourism region as the regional major events capital by leveraging major events through a proactive major events board. | Lead: SCC  
Support: SCDL, TN, DGR, TEQ, NSC, GRC | Medium-Term | Events | Increase share of event visitors |
| 2.7 Create an operator and community education campaign around the Biospheres. | Lead: NSC, Great Sandy & Man Biosphere Committees  
Support: SCDL, TN, DGR | Medium-Term | All | New products on ATDW |
| 2.8 As part of hero experiences, shift the focus from just a beach or hinterland destination to building a reputation for healthy holidays. | Lead: TEQ, SCDL  
Support: TN, DGR | Medium-Term | Leisure Niche | Increase share of niche visitors |
<table>
<thead>
<tr>
<th>MARKETING</th>
<th>STAKEHOLDERS</th>
<th>TIMING</th>
<th>MARKET</th>
<th>KPI/TARGET</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.9 Undertake a brand development exercise to identify the icons that</td>
<td>Lead: TEQ, SCDL</td>
<td>Immediate</td>
<td>All</td>
<td>Support growth of existing markets</td>
</tr>
<tr>
<td>uniquely position the destination in our target markets and showcase them with prioritised publicity and marketing.</td>
<td>Support: TN, DGR</td>
<td></td>
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</tr>
<tr>
<td>2.10 Development of an Indigenous strategy for the region, to showcase the authentic Indigenous experience of the place, names and stories.</td>
<td>Lead: SCDL, TEQ</td>
<td>Immediate</td>
<td>All</td>
<td>Community support for tourism</td>
</tr>
<tr>
<td></td>
<td>Support: SCC, TN, DGR, NSC, QPWS</td>
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</tbody>
</table>
### 3. Target a Balanced Portfolio of Markets

Informed by a thorough understanding of visitor markets and consumer trends, we will target a balanced portfolio of markets that match our competitive strengths and deliver the best results for our destinations.

#### PRODUCT

<table>
<thead>
<tr>
<th>PRODUCT</th>
<th>STAKEHOLDERS</th>
<th>TIMING</th>
<th>MARKETS</th>
<th>KPI/TARGET</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.1 Encourage operators to embrace flexible room night options including mid-week one night stays, through mentoring in yield management.</td>
<td>Lead: SCDL Support: TN, DGR</td>
<td>Immediate</td>
<td>Domestic Business</td>
<td>Increasing off-peak travel</td>
</tr>
<tr>
<td>3.2 Further expansion of events calendar focused on sports, wellness and lifestyle.</td>
<td>Lead: SCC, NSC, GRC Support: SCDL, TN, DGR</td>
<td>Long-term</td>
<td>Events</td>
<td>Increase share of event visitors</td>
</tr>
<tr>
<td>3.3 Increase the availability of internationally ready products, focusing on emerging markets.</td>
<td>Lead: SCDL Support: TN, DGR</td>
<td>Immediate</td>
<td>International</td>
<td>Increase share of international visitors</td>
</tr>
<tr>
<td>3.4 Support the development of packages to suit consumer propensity for shorter, more frequent holidays.</td>
<td>Lead: SCDL Support: TN, DGR</td>
<td>Immediate</td>
<td>Domestic short-haul</td>
<td>Increase share of short-haul visitors</td>
</tr>
</tbody>
</table>

#### MARKETING

<table>
<thead>
<tr>
<th>MARKETING</th>
<th>STAKEHOLDERS</th>
<th>TIMING</th>
<th>MARKETS</th>
<th>KPI/TARGET</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.5 Focus more effort on interstate fly/drive markets with packages and itineraries.</td>
<td>Lead: SCDL Support: TN, DGR</td>
<td>Immediate</td>
<td>Domestic VFR</td>
<td>Increasing off-peak travel</td>
</tr>
<tr>
<td>3.6 Promote greater linkages of niche markets such as health, wellness and education, with the leisure market through targeted packages aimed at international students, families etc.</td>
<td>Lead: SCDL Support: TN, DGR</td>
<td>Immediate</td>
<td>Niche VFR</td>
<td>Increase share of niche markets</td>
</tr>
<tr>
<td>3.7 Prioritise efforts to build mid-week visitation that supports investment in new accommodation through targeting the Business Events and key international markets.</td>
<td>Lead: SCDL, BESC Support: TN, DGR</td>
<td>Immediate</td>
<td>Business Events</td>
<td>Increase mid-week visitation</td>
</tr>
</tbody>
</table>
4. Deliver Quality Service and Innovation

We will deliver authentic, high quality Queensland experiences, led by career-oriented and passionate professionals, and through our operators adopting innovative technologically smart solutions to reaching customers.

<table>
<thead>
<tr>
<th>PRODUCT</th>
<th>STAKEHOLDERS</th>
<th>TIMING</th>
<th>MARKETS</th>
<th>KPI/TARGET</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.1 Plan for seasonal and extreme weather patterns by embracing disaster resilience and business recovery programs.</td>
<td>Lead: SCDL, Support: TEQ, QTIC, TN, DGR, SCC, NRC, GRC</td>
<td>Medium-Term</td>
<td>All</td>
<td>Increase the number of resilient businesses</td>
</tr>
<tr>
<td>4.2 Create a customer service program for the Sunshine Coast tourism region, based on world class best practice examples</td>
<td>Lead: SCDL, Support: TN, DGR</td>
<td>Medium-Term</td>
<td>All</td>
<td>Visitor satisfaction</td>
</tr>
<tr>
<td>4.3 Gain wider community appreciation of the true value of tourism and the visitor economy to the local economy, social development and environmental sustainability.</td>
<td>Lead: SCDL, Support: SCC, NSC, GRC, TN, DGR</td>
<td>Long-term</td>
<td>All</td>
<td>Community support for tourism</td>
</tr>
<tr>
<td>4.4 Mentor businesses and events on being ready for delivering experiences to the Asian market.</td>
<td>Lead: SCDL, Support: TEQ, SCC, TN, DGR, QTIC</td>
<td>Immediate</td>
<td>International (Asia)</td>
<td>Increase share of Asia visitors</td>
</tr>
<tr>
<td>4.5 Seek and build upon investment in niche tourism products:</td>
<td>Lead: SCDL, Support: SCC, NSC, GRC</td>
<td>Long-term</td>
<td>Niche</td>
<td>Increase share of niche visitors</td>
</tr>
<tr>
<td>• Nature</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Food-agribusiness</td>
<td></td>
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<tr>
<td>• Education</td>
<td></td>
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</tr>
<tr>
<td>• Golf</td>
<td></td>
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</tr>
<tr>
<td>• Health &amp; Wellness</td>
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<tr>
<td>• Wedding &amp; Romance</td>
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</tr>
<tr>
<td>• Events</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>• Participatory Sports</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>4.6 Lobby government and be a part of the push for review of Labour laws to allow for more flexible workplace tourism employment agreements.</td>
<td>Lead: QTIC</td>
<td>Medium-Term</td>
<td>All</td>
<td>Government support for tourism</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>MARKETING</th>
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<th>TIMING</th>
<th>MARKETS</th>
<th>KPI/TARGET</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.7 Create a culture of community pride and through the use of digital assets</td>
<td>Lead: RDA, Support: SCDL, TN, DGR, SCC, NSC, GRC</td>
<td>Medium-Term</td>
<td>All</td>
<td>Community support for tourism</td>
</tr>
</tbody>
</table>
| 4.8 | Make digital marketing and industry readiness a higher priority for the destination. | Lead: SCDL  
Support: TN, DGR | Immediate | All | Increase awareness and conversion |
| 4.9 | Undertake regular consumer-research to understand market needs and perceptions to support SCDL in becoming a consumer-led destination marketing organisation. | Lead: TEQ  
Support: TRA, TA, SCDL | Ongoing | All | Support growth of existing and emerging markets |
### 5. Building Strong Partnerships

Strong tourism leadership will drive effective partnerships between government, communities and industries. Strong partnerships will deliver a long term vision which recognises the industry’s benefits to Queenslanders and supports tourism growth.

<table>
<thead>
<tr>
<th>PRODUCTS</th>
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<th>MARKETS</th>
<th>KPI/TARGET</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.1 Build upon entrepreneurial partnerships to support investment in the development of infrastructure.</td>
<td>Lead: SCC, NSC, GRC, DSDIP, RDASC</td>
<td>Long-term</td>
<td>All</td>
<td>Creation of an investment target list</td>
</tr>
<tr>
<td>5.2 Encourage local businesses and tourism partners to better leverage events through a regional approach and promotion of opportunities.</td>
<td>Lead: SCDL, Support: SCC, NSC, GRC, BESC, TEQ</td>
<td>Medium-Term</td>
<td>Events Business</td>
<td>Increase share of event visitors</td>
</tr>
<tr>
<td>5.3 Build upon current partnerships with State and Federal Government to explore investment opportunities and provide guidance on legislation, regulation and policy.</td>
<td>Lead: SCC, NSC, GRC, Support: SCDL, TEQ, DTESB</td>
<td>Long-term</td>
<td>All</td>
<td>New products on ATDW</td>
</tr>
<tr>
<td>5.4 Prioritise industry development activities to increase operator participation in domestic and international trade distribution.</td>
<td>Lead: SCDL, Support: TN, DGR</td>
<td>Immediate</td>
<td>All</td>
<td>Support growth of existing markets</td>
</tr>
<tr>
<td>5.5 Build upon the expansion of the Airport and route development linking the Sunshine Coast tourism region and Cairns.</td>
<td>Lead: SCC, Support: SCDL, NRC, GRC, TN, DGR</td>
<td>Immediate</td>
<td>Fly Fly-Drive</td>
<td>Increase share of visitors</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>MARKETING</th>
<th>STAKEHOLDERS</th>
<th>TIMING</th>
<th>MARKETS</th>
<th>KPI/TARGET</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.6 Explore opportunities for commercial partnerships and sponsorships of destination marketing activities.</td>
<td>Lead: SCDL, Support: SCC, NSC, GRC</td>
<td>Immediate</td>
<td>All</td>
<td>Support growth of existing markets</td>
</tr>
<tr>
<td>5.7 Create a 3 minute vignette showcasing the destination as a location or backdrop for filming and screen production.</td>
<td>Lead: SCDL, Support: SCC, NSC, GRC, TEQ</td>
<td>Medium-Term</td>
<td>Travel for a Purpose</td>
<td>Increase awareness of the region</td>
</tr>
</tbody>
</table>
6. Growing Investment and Access

Facilitated through the reduction of unnecessary red tape, investment in well-planned, timely public and private infrastructure will enable tourism growth and improved visitor access.

<table>
<thead>
<tr>
<th>PRODUCTS</th>
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<th>MARKETS</th>
<th>KPI/TARGET</th>
</tr>
</thead>
<tbody>
<tr>
<td>6.1 Establish a cross-regional Steering Group for the remaining TOP Catalyst projects:</td>
<td>Lead: SCDL</td>
<td>Medium-Term</td>
<td>All</td>
<td>New products on ATDW</td>
</tr>
<tr>
<td>• Development of Niche Products and Markets</td>
<td>Support: SCC, NSC, GRC</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>• Indigenous Product and Interpretation Opportunities</td>
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<tr>
<td>• Tracks and Trails (Glasshouse Mountains to Noose North Shore/Great Sandy)</td>
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<tr>
<td>• Holiday Park Demand Study</td>
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<tr>
<td>• Tourism Precinct Master Planning, including Noosa, Maroochydore, Caloundra and Mooloolaba</td>
<td></td>
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</tr>
<tr>
<td>6.2 Encourage better inter and intra-regional access and transport, ensuring transportation links to key attractions.</td>
<td>Lead: SCC, NSC, GRC, DTMR</td>
<td>Medium-Term</td>
<td>All</td>
<td>Increase average length of stay and repeat visitation</td>
</tr>
<tr>
<td>Support: SCDL, TN, DGR</td>
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<tr>
<td>6.3 Elevate the importance of the Bruce Highway upgrade by working with Freight to ensure it becomes a Federal priority.</td>
<td>Lead: SCC, NSC, GRC, DTMR, RDASC</td>
<td>Immediate</td>
<td>All</td>
<td>Increase repeat visitation</td>
</tr>
<tr>
<td>Support: SCDL, TN, DGR</td>
<td></td>
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</tr>
<tr>
<td>6.4 Determine the feasibility of direct air route development, domestically to Cairns as well as international flights providing connection with Asia.</td>
<td>Lead: SCC</td>
<td>Medium-Term</td>
<td>Fly Fly-Drive</td>
<td>Increase share of international visitors</td>
</tr>
<tr>
<td>Support: RDASC, TEQ</td>
<td></td>
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</tr>
<tr>
<td>6.5 Development of new runway and airport terminal.</td>
<td>Lead: SCC, NSC, GRC</td>
<td>Long-Term</td>
<td>International</td>
<td>Increase share of international visitors</td>
</tr>
<tr>
<td>Support: NSC, GRC</td>
<td></td>
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</tr>
<tr>
<td>6.6 Expand opportunities for the development of more events/conference/meeting venues including the potential for a cultural precinct and convention centre.</td>
<td>Lead: SCC</td>
<td>Medium-Term</td>
<td>Events Business</td>
<td>Increase share of events</td>
</tr>
<tr>
<td>Support: NSC, GRC, SCDL</td>
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<tr>
<td>6.7 Identify potential investment support for building a five star hotel and convention centre.</td>
<td>Lead: SCC</td>
<td>Medium-Term</td>
<td>Events</td>
<td>Increase share of events</td>
</tr>
<tr>
<td>Support: GRC, NSC, SCDL</td>
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</tr>
<tr>
<td>6.8</td>
<td>Ensure community and service infrastructure requirements keep pace with a growing population so as to support sustainable tourism growth.</td>
<td>Lead: SCC, NSC, GRC, RDASC</td>
<td>Long-Term</td>
<td>All</td>
</tr>
<tr>
<td>6.9</td>
<td>Implement digital upgrades within the region; including more free Wi-Fi.</td>
<td>Lead: SCC, NSC, GRC, RDA</td>
<td>Medium-Term</td>
<td>All</td>
</tr>
<tr>
<td>6.10</td>
<td>Maintain hinterland infrastructure including signage, camping facilities and nature trails.</td>
<td>Lead: SCC, NRC, GRC</td>
<td>Medium-Term</td>
<td>Niche</td>
</tr>
<tr>
<td>6.11</td>
<td>Prepare a feasibility study and seek support for a major sporting events stadium.</td>
<td>Lead: SCC</td>
<td>Medium-Term</td>
<td>Sporting Events</td>
</tr>
<tr>
<td>6.12</td>
<td>Form an Industry Cluster to explore the feasibility of a Cane Rail Cycle Trail utilising the existing rail infrastructure as part of a broader strategy of cycle trail development.</td>
<td>Lead: SCDL</td>
<td>Medium-Term</td>
<td>Niche</td>
</tr>
<tr>
<td>6.13</td>
<td>Support the development of a major convention centre ($250M) in the destination</td>
<td>Lead: SCC</td>
<td>Immediate</td>
<td>Events</td>
</tr>
<tr>
<td>6.14</td>
<td>Align investment attraction strategies between Council, the State Government and the RTO with targeted trade and consumer promotion internationally.</td>
<td>Lead: SCC, NSC, GRC</td>
<td>Immediate</td>
<td>International</td>
</tr>
<tr>
<td>6.15</td>
<td>Identify 4-5 star locations suitable for investment throughout the Sunshine Coast tourism region.</td>
<td>Lead: SCC, NSC, GRC</td>
<td>Immediate</td>
<td>All</td>
</tr>
<tr>
<td>6.16</td>
<td>Investigate the feasibility of another sustainable Chinese investment that would take a collective approach to economic development/ tourism/ lifestyle as a package to broaden and maximise the potential that China presents.</td>
<td>Lead: SCC, NSC, GRC</td>
<td>Medium-Term</td>
<td>All</td>
</tr>
<tr>
<td>6.17</td>
<td>Work with Councils to build a case to move towards the de-regulation of beach access for hospitality and tourism infrastructure.</td>
<td>Lead: SCC, NSC, GRC</td>
<td>Medium-Term</td>
<td>All</td>
</tr>
<tr>
<td>6.18</td>
<td>Support investment in new accommodation with an up-to-date audit of existing properties and investment trends and key statistics that support the case for</td>
<td>Lead: SCC, NSC, GRC, DSDIP</td>
<td>Immediate</td>
<td>All</td>
</tr>
</tbody>
</table>
APPENDICES
## Appendix 1: Sunshine Coast Tourism Region DTP Consultation List

<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
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<th>Position</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grant Hunt</td>
<td>Chair, SCDL Board</td>
<td>Julie Walker</td>
<td>Councillor, Gympie Regional Council</td>
</tr>
<tr>
<td>Mark Skinner</td>
<td>Deputy Chair, SCDL Board</td>
<td>David Gration</td>
<td>University of the Sunshine Coast</td>
</tr>
<tr>
<td>John Hall</td>
<td>Company Secretary, SCDL Board</td>
<td>Craig Matheson</td>
<td>Manager ED, Sunshine Coast Council</td>
</tr>
<tr>
<td>David Thompson</td>
<td>Director, SCDL Board</td>
<td>Charlie Gardener</td>
<td>Chairman, Sunshine Coast Film Corporation Ltd.</td>
</tr>
<tr>
<td>Denis French</td>
<td>Director, SCDL Board</td>
<td>Corinne Meiklesen</td>
<td>GM, Buderim Ginger Factory</td>
</tr>
<tr>
<td>Fraser Green</td>
<td>Director, SCDL Board</td>
<td>Peter Foran</td>
<td>Manager, Spinnaker Quays Mooloolaba</td>
</tr>
<tr>
<td>Ian McNicol</td>
<td>Director, SCDL Board</td>
<td>Jim Bererdo</td>
<td>Director, Noosa International Food &amp; Wine</td>
</tr>
<tr>
<td>Jane Fraser</td>
<td>Director, SCDL Board</td>
<td>Andrew Saunders</td>
<td>TDM, DGR</td>
</tr>
<tr>
<td>Rodger Powell</td>
<td>Director, SCDL Board</td>
<td>Geoff Brittingham</td>
<td>Regional Director</td>
</tr>
<tr>
<td>Simon Ambrose</td>
<td>CEO, SCDL</td>
<td>Mick Cubis</td>
<td>Area Manager, NPRSR</td>
</tr>
<tr>
<td>Gill Toner</td>
<td>Executive Assistant to the CEO, SCDL</td>
<td>Julie Walker</td>
<td>Chairman, DGR</td>
</tr>
<tr>
<td>Laughlin Rigby</td>
<td>Marketing, SCDL</td>
<td>Kim Morgan</td>
<td>Chairman, Central Destination Action Panel</td>
</tr>
<tr>
<td>Michael Donnelly</td>
<td>TDM, SCDL</td>
<td>Julie Swain</td>
<td>Manager, DSDIP</td>
</tr>
<tr>
<td>Julie Cullen</td>
<td>TDM, SCDL</td>
<td>Tony Gill</td>
<td>Owner, Art on Cairncross</td>
</tr>
<tr>
<td>Vynka Hutton</td>
<td>Industry Development, SCDL</td>
<td>Peter Homan</td>
<td>GM, Eumundi Markets</td>
</tr>
<tr>
<td>Lauren Hofman</td>
<td>Business Events Manager</td>
<td>Jo Robey</td>
<td>Chair, Sunshine Coast Sports Federation</td>
</tr>
<tr>
<td>Steve McPharlin</td>
<td>Chairman, Tourism Noosa</td>
<td>Michael Shadforth</td>
<td>President, Sunshine Coast Chamber Alliance</td>
</tr>
<tr>
<td>Damien Massingham</td>
<td>GM, Tourism Noosa</td>
<td>Sandy Zubrinich</td>
<td>Chair, Sunshine Coast Business Council</td>
</tr>
<tr>
<td>Bill Darby</td>
<td>Chairman, Southern Destination Action Panel</td>
<td>Carolyn Bullen</td>
<td>ED, Interim Noosa Council</td>
</tr>
<tr>
<td>Fere De Deyne</td>
<td>Owner, Big Kart Company</td>
<td>Russell Mason</td>
<td>GM, RDASC</td>
</tr>
<tr>
<td>Steve Hutton</td>
<td>Marketing Executive, Sunshine Coast Airport</td>
<td>Jane Flett</td>
<td>Major Projects Officer, DSDIP</td>
</tr>
<tr>
<td>Wayne Poole</td>
<td>International BDM, Australia Zoo</td>
<td>Noel Mooney</td>
<td>President, Coolum Business and Tourism Association</td>
</tr>
<tr>
<td>James Thomas</td>
<td>GM, Underwater World</td>
<td>Bill Salsbury</td>
<td>President, Sunshine Coast Education Queensland</td>
</tr>
<tr>
<td>Niel Mason</td>
<td>GM, Outrigger Little Hastings St.</td>
<td>Anne Jacobson</td>
<td>Sunshine Coast Education Queensland</td>
</tr>
<tr>
<td>Peter Todd</td>
<td>Member, Destination Gympie TAC</td>
<td>Neal Muller</td>
<td>DTESB</td>
</tr>
<tr>
<td>Gary Mears</td>
<td>GM, The Events Centre</td>
<td>Alexina Johnson</td>
<td>RDASC</td>
</tr>
<tr>
<td>Damien Keenan</td>
<td>Ramada Hotel &amp; Conference Centre</td>
<td>David Morgans</td>
<td>Experience and Destination Director, Tourism and Events Queensland</td>
</tr>
<tr>
<td>Vickii Cotter</td>
<td>Director, Noosa Jazz Festival</td>
<td>Lynne Banford</td>
<td>Regional Director, Tourism and Events Queensland</td>
</tr>
<tr>
<td>Jeff Gillies</td>
<td>CMO, Ironman</td>
<td>Jason O’Pray</td>
<td>Councillor, Sunshine Coast Council</td>
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<tr>
<td>Julie Shelton</td>
<td>Director, Real Food Festival</td>
<td>Bernard Smith</td>
<td>CEO, Gympie Regional Council</td>
</tr>
<tr>
<td>Rae Gate</td>
<td>Councillor, Gympie Regional Council</td>
<td>Lynne Wilbrahim</td>
<td>Manager ED, Gympie Regional Council</td>
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</table>
Appendix 2: Sub Region – Noosa

The following information has been provided by Tourism Noosa as a part of the Sunshine Coast tourism region Destination Tourism Planning process.

PART A: DESTINATION ANALYSIS

What unique or hero experiences does your sub-region offer its visitors?

- Diversity and combination of low-rise and natural surrounds, laidback village atmosphere, year-round warm and sunny climate, ease of access and cosmopolitan lifestyle, with award-winning restaurants and cafes, array of accommodation, boutiques and activities for everyone make it a special holiday destination.
- Surrounded by beach, river, hinterland and national parks.
- Easily accessible nature-based activities, adventures and tours, including safe waters for swimming, stand-up paddling, surfing, kayaking and jet-skiing; kitesurfing and skydiving; accessible National Park walks; river cruises; and tours to the Noosa Everglades and Fraser Island.
- Busy calendar of year-round events.

Do your destination marketing efforts have clearly articulated, differentiating positioning?

Yes. Tourism Noosa carefully manages Noosa’s tourism brand to reflect the diverse experiences on offer, to position the distinctive holiday benefits over competitor destinations and to respond to shifting market trends, ensuring activity continues to resonate with key visitor markets.

Recent brand research undertaken in Sydney, Brisbane and Melbourne indicated Noosa has a dominant brand position in food and wine, events, sophistication and nature – attributes which are integrated across all marketing and communications activities.

Do your current primary marketing efforts target existing ‘natural’ or local visitational pull?

While our primary efforts are targeted outside the region at major domestic markets, all our major campaigns include local elements as part of our ongoing local communications strategy which sees us engage with local media and through social media messaging throughout the year.

Does your destination marketing leverage the Sunshine Coast tourism region’s identified hero experiences?

Tourism Noosa’s marketing showcases recognised regional hero experiences including beach culture, hinterland townships and experiences, and nature and outdoor activities.

Destination Vision

Noosa will exceed expectations by delivering outstanding service in a unique natural environment where visitors can participate and engage. We will work with industry and community to achieve economic, social and environmental sustainability.

What makes Noosa unique in comparison to competitors and how can this be explained to consumers?

While there are many other beautiful beach regions and natural attractions in competitor regions including Port Douglas, Bali, Byron Bay, Fiji and Whitsundays, Noosa is differentiated by its ease of access and association with food and dining, events, chic ambience, low-rise build and attributes such as a fresh, natural and healthy lifestyle.

Noosa is the only region among our major competitors that is a UNESCO-declared Biosphere Reserve, international recognition that the region has an outstanding natural environment with a community that works towards living sustainably, promoting harmony between people and nature through education, conservation and sustainable development.
Market Opportunities

Visitors
The Noosa region attracts more than 2 million visitors annually, made up of domestic (almost 90%) and international, overnight and day-trippers.

Visitor Origin
Most of our visitors are domestic, with about 12% of our overnight market comprising international visitors. Our key domestic markets are Brisbane and regional Queensland, Melbourne and Sydney. The largest inbound markets are the UK, NZ, USA and Germany.

Length of Stay
Average length of stay is 4.4 nights (ABS tourism data). Average length of stay has increased by about 0.5 of a day over the past 5 years.

Expenditure
Total visitor expenditure in the year to September 2013 was more than $914 million (IVS/NVS data). Domestic overnight spending has steadily increased in the past 5 years while international spending has now pegged back to pre-GFC levels, showing signs of recovery (IVS/NVS data).

Future Source Markets
While maintaining concentration on current markets we have also identified emerging international markets for the region from segments in China, India and UAE. We also have a strategy to target niche segments including weddings, adventure and nature based, golf, conferences, education and short breaks.

Do you have a balanced portfolio of markets?
Yes. A key focus for Tourism Noosa has been to ensure that our strategies safeguard a sustainable tourism benefit for the region by working to seasonal dispersion, regional dispersal and segment marketing.

Have you strategically cultivated emerging source markets?
Yes, particularly international markets.

Impediments and Implications of Growth

What impact would achieving the target have on current infrastructure?
Our marketing is targeted at encouraging visitation outside the peak holiday periods when there is availability in accommodation, restaurants and tours. One issue is parking/traffic around Hastings Street which is in part alleviated by free holiday buses at peak times and free event buses.

What impacts would there be on the destination workforce and community?
Increased visitation at times outside of peak periods would even-out seasonality issues, providing more secure, long-term employment for locals. Tourism is currently the single biggest contributor to the local economy, generating an estimated 8000 full-time equivalent jobs, equating to at least 14,000 people employed in the industry – any increase would benefit the local community.

Which market segments represent the best opportunities for growth?
Emerging international markets as identified above, and niche domestic markets.

Which Markets Will Deliver the Growth
Why will these visitors choose you? What is needed to make it happen?
Our marketing efforts are reflected in growth in key travel segments which we are able to measure in research reports based on NVS/IVS data. Among travel parties, Adult Couples and Family Groups show strength, preferring indicates households with more affluent incomes are strengthening.
PART B: DESTINATION STRATEGIES

Challenges and Opportunities to Achieving the Vision

<table>
<thead>
<tr>
<th>Top 5 Challenges</th>
<th>Top 5 Opportunities</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Competition from international and domestic destinations.</td>
<td>1. Leverage work of industry partners and build industry links.</td>
</tr>
<tr>
<td>3. Growth in outbound travel by Australians.</td>
<td>3. Leverage events and conference market to convert to leisure.</td>
</tr>
<tr>
<td>4. Need to increase product range and quality service standards.</td>
<td>4. Work with a motivated industry to improve service standards through the <em>Welcome to Noosa</em> program.</td>
</tr>
<tr>
<td>5. Limitations re standard of Bruce Highway.</td>
<td>5. Build on Web-based marketing to reach new and younger markets.</td>
</tr>
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Destination and Sub Regional Strategies

Tourism Noosa’s Sustainable Destination Action Plan 2013-2016 identifies priorities and strategies for growth in the key areas of marketing, industry and product development, and sustainability, as outlined below.

1. Preserve the Region’s Nature and Culture

1.1 Leverage eco-accreditation of operators.

1.2 Increase partnership approach to sustainability with key stakeholders.

1.3 Link tourism operators with community groups to engage visitors with sustainability actions.

2. Offer Iconic Experiences

2.1 Leverage publicity from events, including social media.

2.2 Develop hinterland tourist trails with improved tourism signage.

3. Target a Balanced Portfolio of Markets

3.1 Target niche segments including weddings, adventure and golf.

3.2 Increase preference in target markets by focusing on the short break market.

3.3 Leverage events through social media and PR.

3.4 Grow brand equity through innovative approaches.

3.5 Build social media audience and following.

3.6 Flatten seasonality with new markets.

3.7 Distinct campaign platforms to position Noosa at key times of the year.

4. Deliver Quality Service and Innovation

4.1 We have implemented a service quality program, Welcome To Noosa, with a strategy to build participation and evolve the program.

4.2 Increase member participation in Tourism Noosa activity including self-funding education programs, service quality program and regular training programs.

4.3 Undertake an industry training needs analysis.

4.4 Encourage sustainability in events.
5. Building Strong Partnerships

5.1 Leverage marketing opportunities in partnership with Tourism Australia, Tourism and Events Queensland and Sunshine Coast Destination Ltd.

5.2 Build industry links.

5.3 Develop partnerships in marketing and events.

5.4 Increase work with existing cluster groups – i.e. weddings and adventure.

6. Investment and Infrastructure

6.1 Educate property owners on benefits of refurbishment.

6.2 Have input into regional planning – work with Council to ensure sustainable building measures are maintained and if needed, strengthened.

PART C: PRIORITIES AND ACTION PLAN

Sub-region priorities – top 5 priority strategies ranked in order, as outlined in the Noosa Sustainable Destination Action Plan

1. Grow preference in our target markets

2. Increase visitation and spend

3. Leverage and support events through social media and publicity

4. Build social media audience and following

5. Establish a lead sustainability program with key partners
Appendix 3: Priority Growth Strategy Targets to 2020

The graphs contained in appendix 3 show annual targets (total value) up to 2020 for each of the ten growth strategies identified in the destination tourism plan.

Priority 1 – Support the growth of signature events

Priority 2 – Improved digital marketing
Priority 3 – Nature-based iconic experience development

Priority 4 – Increased investment in interstate marketing
Priority 5 – Major PR and content push

Priority 6 – Build mid-week visitation
Priority 7 – Increase air access and route development

Priority 8 – Niche marketing and product development strategy
Priority 9 – Grow business events

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<th>Year</th>
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</tr>
<tr>
<td>2020</td>
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Priority 10 – Increase road access

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