

NOOSA

SUSTAINABLE DESTINATION ACTION PLAN 2013-2016



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INTRODUCTION

The Noosa region at the northern end of the Sunshine Coast is one of Australia's original and most popular holiday destinations, attracting 1.8 million visitors annually (approx 90% domestic) who contribute almost \$867 million to the local economy*[△].

Tourism is the single biggest contributor to the economy in the Noosa region, generating an estimated 8000 full-time equivalent jobs**, equating to at least 14,000 people employed in the industry.

NOOSA REGION:

\$867 million current total visitor expenditure

8000 FTE jobs directly in the Noosa region

SUNSHINE COAST:

\$1.94 billion to the Sunshine Coast economy

20.4% of jobs provided directly on the Sunshine Coast

Tourism Noosa, the official tourism organisation for the Northern Region of the Sunshine Coast, including Noosa Heads and Noosaville to Coolumburra, Eumundi and the rest of the Noosa hinterland, has a community leadership role and works in partnership with Sunshine Coast Council, Sunshine Coast Destination Ltd, Tourism and Events Queensland, Tourism Australia, Noosa Biosphere Ltd, business associations, community organisations, tourism industry operators and many others.

Tourism Noosa represents almost 500 members across accommodation, hospitality, tours and activities, retail, health, well-being and tourism services. The organisation's activities are also supported through a tourism levy to which thousands of local businesses contribute.

ABOUT THIS DOCUMENT

This Noosa Sustainable Destination Action Plan 2013-2016 sets a new strategic vision for the leadership and management of the industry in our community. This 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[△]**. 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**

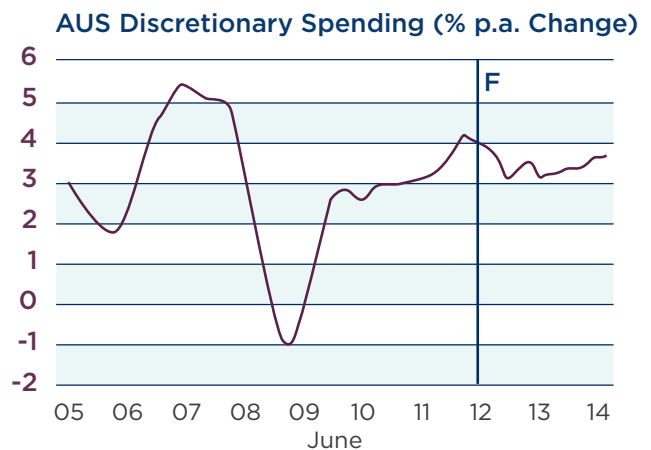
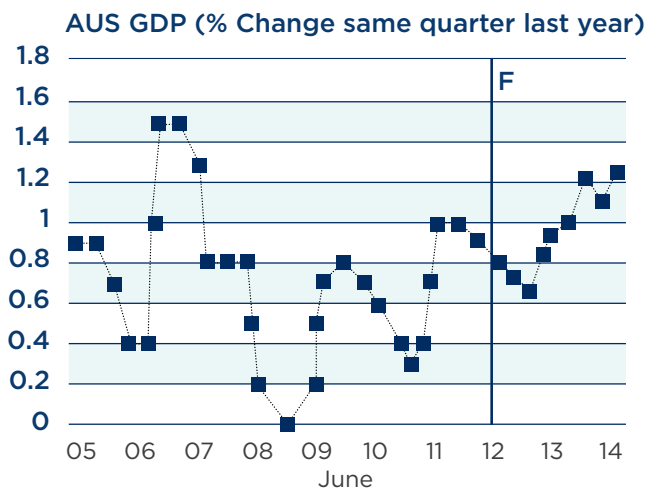
The Noosa Sustainable Destination Action Plan builds on Tourism Noosa's existing 10-year Sustainable Tourism Plan which articulated a broad vision and values for the industry.

Tourism Noosa is committed to the DestinationQ 12-month key action plan, as agreed to in June 2012 between the Queensland Government and Queensland Tourism Industry Council. The DestinationQ plan aims to strengthen relationships between Government, Tourism and Events Queensland, regional and local tourism organisations and industry to restore Queensland as Australia's premier tourism destination. Tourism Noosa will work with its partners to build tourism in the State and at a regional level.

Tourism Noosa will support the Queensland Government's aim of doubling total visitor expenditure in the State to \$30 billion by 2020.[^]

DestinationQ outcomes call on government, industry and operators to work together – something to which Tourism Noosa is also committed through achieving outcomes within the three priority areas above. To this end we will also continue our partnership approach with industry, Tourism and Events Queensland, Sunshine Coast Destination Ltd and all key stakeholders. This will help meet the objective of increasing total annual visitor expenditure in the Noosa region to \$1 billion and ultimately assist the Queensland Government in meeting its 2020 targets.

Economic modelling for the Noosa region shows forecast changes in Australian GDP and household spending which is reflected in positive forecasts for future growth in overnight visitor numbers.



The global financial uncertainty is still impacting on the Australian economy but we are optimistic that the worst is behind us, and GDP and household spending are growing again. Both Australian GDP and household spending are expected to continue to recover. September 2012 forecasts are slightly lower than June 2012 forecasts because of the Euro debt issues.

PLANNING PROCESS

This plan was developed taking the following steps:

1. Tourism Noosa members' planning workshop
2. Stakeholder meetings around the region, including trader and industry groups
3. Tourism Noosa's Board of Directors strategy planning
4. Tourism Noosa management team planning and committee workshop
5. Full members' consultation
6. Ongoing analysis of appropriate qualitative and quantitative research

DESTINATION VISION

Redefine sustainable luxury: The Noosa region will exceed expectations in each of our sophisticated villages by delivering outstanding and friendly service in a unique natural environment where visitors can actively participate and engage to re-energise, reconnect and relax.

ORGANISATION VISION

Lead by example: Tourism Noosa, with the support of industry, will be seen as a community leadership organisation that works with the community to achieve economic, social and environmental sustainability for tourism in the Noosa region.



Situation analysis

Following extensive consultation with members, business owners, the Tourism Noosa Board and other key stakeholders, the situation analysis below provides a platform for developing scenarios for growth.

OPPORTUNITIES

- ▶ **Leverage work of TA, TEQ and SCDL**
- ▶ **Noosa Biosphere – international recognition**
- ▶ **Build awareness in a crowded marketplace**
- ▶ **Need for brand consistency internally and with partners**
- ▶ **Build trade links**
- ▶ **Energise the community – build strong connections**
- ▶ **Leverage eco-accreditation of operators**
- ▶ **Leverage trends to authenticity and environment**
- ▶ **Motivated members**
- ▶ **Web-controlled travel**
- ▶ **Attract “young” sophisticated travellers**
- ▶ **Develop more regional airline routes and seat capacity**
- ▶ **Leveraging events and conference market to convert to leisure**

THREATS

- ▶ Competition from international and domestic destinations, increasing product range and quality
- ▶ Risk of climate changes
- ▶ Continued growth in outbound travel by Australians
- ▶ Not expanding our range of preferers to include young travellers
- ▶ Doing nothing
- ▶ Reduced aviation services
- ▶ Current limitations re standard of Bruce Highway – limited or no improvements

STRENGTHS

- ▶ **Accessible yet remote – with a range of experiences at our doorstep**
- ▶ **Green belt, low density**
- ▶ **Safe**
- ▶ **Sophisticated villages**
- ▶ **Ease of access by road and from Sunshine Coast airport**
- ▶ **Community passion**
- ▶ **1 of only a few north-facing beaches on the east coast – safe, protected**
- ▶ **National Parks, waterways and hinterland are integrated with towns and villages**
- ▶ **Moderate climate**
- ▶ **Ease and range of experiences**
- ▶ **Comfortable**
- ▶ **The whole package: elegant, weddings, retail, food, coffee, beach, parks, river, hinterland**
- ▶ **Boutique villages around nature**
- ▶ **“Locavore” – local produce, local knowledge**

WEAKNESSES

- ▶ Service level sometimes falls below perception
- ▶ Need to marry message with expectation
- ▶ Vulnerable to impacts of bad weather
- ▶ Media coverage of weather
- ▶ Noosa’s inbound market hit hard by GFC due to exposure to Euro nations
- ▶ Seen as expensive
- ▶ Lost bragging rights
- ▶ Tired – although starting to reinvest
- ▶ Ageing population

SCENARIOS FOR GROWTH:

KEY AIMS	POSSIBLE OUTCOMES
Work collaboratively with industry to increase cooperative marketing spend and effectiveness by 20% to promote Noosa and build brand preference	Drive a 3% increase in preference (pre-GFC levels), bringing an additional 100,000 visitors
Attract an additional 100,000 overnight visitors from targeted domestic and international markets	Increase economic contribution of tourism in the region by \$34.66m exponentially per year, supporting a further 468 jobs p.a., toward achieving total \$1billion spend
Become known as a leader in sustainable luxury tourism, defined by the quality and emotion attached to experiences rather than simply the dollar value	Attract new investment, driving growth in high value visitors: a \$5 per night increase per visitor would contribute \$9m annually to the economy
Growth and development of tourism that is consistent with community values	Greater contribution from stakeholders to tourism, providing additional funds to industry development

The Noosa region is now at the point where the industry needs to focus on product development and training to regain our loyal customers and grow a new base of customers, particularly younger visitors. Awareness of the destination remains high and while satisfaction has remained high, preference for Noosa in comparison to other domestic holiday destinations has fallen.

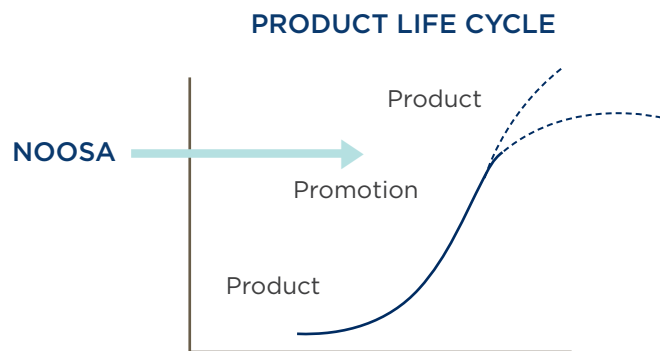
The product life cycle recognises that for a destination to continue to grow, product needs to evolve in line with shifting visitor needs and expectations, new developments in communications and distribution, and the changing economy. Promotion alone is not enough.

“Product”, as outlined by the Queensland Government in the “5 Ps of marketing”, is central to the platform on which to build our future. It speaks directly to each of the three key areas. Attention to product development is central to addressing the number 1 challenge facing our industry: Raising standards of service to meet or exceed expectations. It directly links with the remaining “Ps”: Promotion, Price, Place, People.



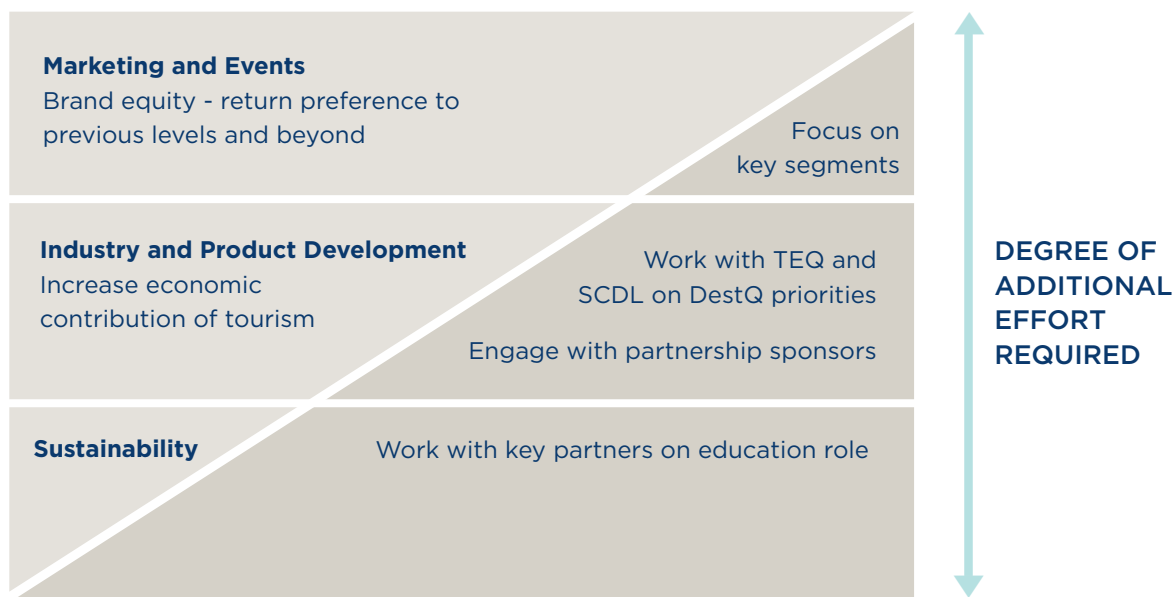


As a result of a Strengths, Weaknesses, Opportunities and Threats analysis, and setting priorities within the framework of the 5Ps, we are moving to strengthen our role in industry and product.



Within the three key areas of Marketing and Events, Industry and Product Development and Sustainability, it is acknowledged that greater effort will be needed to realise new targets and goals - the chart below outlines this approach and the varying levels of additional effort required within each key area.

PRIORITY



MARKETING ENVIRONMENT

How is Noosa perceived in the current marketing environment? Outlined below are some thoughts arising from the consultation process:

**REJUVENATING NATURAL AND HEALTHY
OUTDOOR AND ACTIVE VILLAGES IN
NATURE SOPHISTICATED PROXIMITY OF
EXPERIENCES THE LIFE YOU ASPIRE TO
EVENTS VALUE UNSTRESSFUL VARIETY
OF EXPERIENCES FAMILY-FRIENDLY SAFE
GOOD FOOD ORIGINAL LOW RISE RELAXING**

THE IDEAL NOOSA VISITOR



▶ Active ▶ High discretionary spend ▶ Aspirational ▶ Unwinding ▶ Value seeking



TARGET MARKETS

DOMESTIC MARKET:

- ▶ Short breaks targeting specific areas
- ▶ Young families (especially 35-55yo couples with young children)
- ▶ Segments including weddings, golf, adventure, conferences

INTERNATIONAL MARKET:

- ▶ Primary: UK, NZ, Germany
- ▶ Secondary: USA, other Europe, Singapore
- ▶ Emerging: China, India, United Arab Emirates
- ▶ Segments: Nature-based, Visiting Friends and Relatives, education, self-drive touring

The ideal Noosa experience

Based on consultation with members and other stakeholders, the vision for Noosa in the future is that it will be a place where you can:

- ▶ Have a holiday and feel healthier, happier and a better version of yourself
- ▶ Relax surrounded by green and blue – stylish, understated luxury, natural beauty, safe villages
- ▶ Experience a different world – friendly, uncrowded, laidback and spend less time travelling
- ▶ Soak up the nature that surrounds and be an active participant
- ▶ Be rejuvenated in body, senses and spirit
- ▶ Meet local heroes and experience their world ...

“The Retailer – knew just what we wanted”

“The Eco guide – told us the story of the mangroves”

“The Chef – we caught the fish and she cooked it for us”

STRATEGIES FOR GROWTH

1

MARKETING AND EVENTS

2

INDUSTRY AND
PRODUCT DEVELOPMENT

3

SUSTAINABILITY

MEASURES OF SUCCESS

- ↑ SPEND TO \$1 BILLION PER YEAR
- ↑ PREFERENCE IN OUR TARGET MARKETS BY 3% PER YEAR TO 2016
- ↑ INDUSTRY PARTICIPATION IN CAPACITY BUILDING PROGRAMS BY 15%
- ↑ PARTNER SUPPORT FOR OUR STRATEGIC PROJECTS BY 30%



PRIORITY 1 MARKETING AND EVENTS

KEY PROJECTS

- ▶ Target niche segments
- ▶ Target short breaks
- ▶ Leverage events



KPI: Preference in our target markets grows 3% p.a. to 2016

AIMS:

- ▶ Increase preference in our target markets by:
 - Focusing on the short break market
 - Leveraging our events in social media and PR
 - Being a leader in the weddings market
 - Building a boutique conference market
- ▶ Grow brand equity through innovative approaches
- ▶ Focus on our paid, owned and earned media (POEM)
- ▶ Build social media audience and following
- ▶ Create brand ambassadors
- ▶ Flatten seasonality with new markets

‘Noosa is more than just another beachside destination’

Distinctive villages are surrounded by nature – beach, national parks, river and hinterland, catering to a variety of visitors including families, couples and adults. It promotes a healthy outdoors lifestyle, combined with a vibrant and regular calendar of events.

There will be a new focus on segment marketing, targeting niche groups including weddings, boutique conferences, adventure travel, “getaways” such as golfing holidays and girls’ weekend escapes.

Distinct campaign platforms will position Noosa at key times of the year (such as autumn and winter), with new focused campaigns for spring, late summer and short breaks. This campaign structure will be supported by targeted niche activity with tailored brand/destination messages.

ACTIONS	TIMING
Continue the Marketing Sub-Committee of the Tourism Noosa Board and invite innovative players from across the region to get more involved	From Quarter 1: 2013
Target short breaks	Quarter 1-4: 2013
Increase our share of 30-150 pax conference and incentive groups	By Quarter 1: 2014
Prepare a 3-5 year international marketing strategy	Quarter 1: 2013
Develop partnerships in marketing and events	Quarter 1-4: 2013
Stronger focus on publicity with a view to growing not only the paid, but owned and earned media (POEM)^^^	From Quarter 1: 2013
Leverage publicity from events, including social media (push event ambassadors)	From Quarter 1: 2013
Leverage marketing opportunities in partnership with TA, TQ and SCDL	From Quarter 1: 2013
Target niche segment marketing including weddings, adventure, golf, conferences	Quarter 1-4: 2013
Commission qualitative and quantitative research re preference, perception, satisfaction	Quarter 1: 2013
Support event sustainability	From Quarter 1: 2013
Review event funding	From Quarter 1: 2013
Target packages for events to value-add (including return offer)	Quarter 3-4: 2013

PRIORITY 2 INDUSTRY AND PRODUCT DEVELOPMENT

KEY PROJECT

- ▶ Implement a service quality program

KPI: Increase industry participation in training and capacity building programs by 15%

AIMS:

- ▶ Increase member participation in Tourism Noosa activity including:
 - Self-funding education programs
 - A service quality program
 - Trade engagement mentoring and support
- ▶ Increase partnership project support to deliver programs and reach both members and non-members
- ▶ Build customer satisfaction

Increasing the value of the tourism industry to the local economy hinges on operators being aware of the importance of product and service. Educational opportunities for business owners and staff can be achieved through implementing Tourism Noosa's service quality program.

This will be the cornerstone of a training and capacity-building focus for operators, aimed at improving product and the ability of staff to sell product, and establishing the importance of an economy focused on service.

The aim is that industry development programs would become self-funding.

The program will make use of Tourism Noosa's existing website and could include features such as information on how to manage different cultures.





ACTIONS	TIMING
Create an Industry and Product Development Sub-Committee of the Tourism Noosa Board, jointly with the Sustainability Sub-Committee and invite key players from across the region to get involved	From Quarter 1: 2013
Revitalise quality service culture	From Quarter 1: 2013
Implement a service quality program	From Quarter 1: 2013
Increase industry accredited training	From Quarter 1: 2013
Establish a local industry-based tourism awards program	Quarter 3: 2013
Develop partnerships for industry development	From Quarter 2: 2013
Support self-funding training programs	From Quarter 1: 2013
Consumer satisfaction – through research	From Quarter 1: 2013
Work with TEQ on Destination Q priorities	From Quarter 1: 2013
Work with partners including Council, SCDL to enhance industry standards	From Quarter 1: 2013
Partner with education stakeholders to build share of study tourism	From Quarter 2: 2013
Link programs – schools link as a model (industry talks to schools, council, locals)	From Quarter 2: 2013
Training needs analysis – monthly training programs for members such as social media, distribution and international distribution	From Quarter 1: 2013
Increase work with cluster groups already in place – i.e. weddings, adventure, conference and incentives	From Quarter 1: 2013
Tie training into government accreditation programs	Quarter 3: 2013
Educate owners on benefits of refurbishment	From Quarter 2: 2013
Educate owners on benefits of 1-night stays	From Quarter 1: 2013
Work with Council to encourage sensitive eco-tourism projects that reposition Noosa as a leader in sustainable luxury	Quarter 3: 2013
Develop hinterland tourist trails with improved tourism signage	Quarter 3: 2013
Partner with appropriate industry members to develop special interest trails such as an Arts Trail	Quarter 2: 2013

PRIORITY 3 SUSTAINABILITY

KEY PROJECT

- ▶ Establish a lead sustainability program with key partners



KPI: Increase partner support for our sustainability approach by 30%

AIMS:

- ▶ Position Noosa as a leader in corporate social responsibility that delivers real conservation outcomes
- ▶ Work in collaboration with community, conservation and economic development groups to link visitors to sustainability programs locally
- ▶ Increase local support for tourism

The Noosa region is a globally recognised, UNESCO-designated Biosphere Reserve – something of which locals and tourism industry operators should be aware and proud. It is a global stamp of approval for the community's efforts to maintain the balance between community and environment.

There are just 14 UNESCO Biosphere Reserves in Australia - in 2007 Noosa became Queensland's first.

Continuing to educate the industry about the values of the Noosa Biosphere Reserve as a proof-point of this community's efforts to live in harmony with nature will help "tell Noosa's sustainability story". A major benefit of this is to increase visitor and community engagement, motivation and appreciation of the region and its natural assets.

The sustainability message dovetails with the industry development priority and would link to the service quality program.

In addressing the commitment to corporate social responsibility, a single, focused, lead sustainability program such as banning plastic water bottles or plastic bags, supporting a koala fence or establishing a bicycle program would establish publicly embraceable targets and motivate the local community to support a Tourism Noosa initiative, helping increase local support for tourism.

Tourism Noosa, operators and the community can show a demonstrated commitment to sustainability through programs such as participation in Clean Up Australia Day.

ACTIONS	TIMING
Create a Sustainability Sub-Committee of the Tourism Noosa Board, jointly with the Industry and Product Development Sub-Committee and invite key players from across the region to get involved	From Quarter 1: 2013
Increase partnership approach to sustainability with key stakeholders	From Quarter 1: 2013
Create tourism initiatives with real conservation outcomes including CSR activities linked to business events (e.g. Koala fence project)	From Quarter 2: 2013
Get behind a single, focused lead sustainability program (e.g. ban the bag, ban water bottles, bikes program)	From Quarter 2: 2013
Eco-accreditation program to link with the service quality program	From Quarter 2: 2013
Link members and community organisations	From Quarter 1: 2013
Tell visitors and locals the story of 50 years of community commitment, history of conservation and social integration	From Quarter 1: 2013
Link tourism operators with community groups to engage visitors with sustainability actions such as tree planting	From Quarter 2: 2013
Encourage sustainability in events in partnership with SCDL and Business Events Sunshine Coast	From Quarter 1: 2013
Tourism input into regional planning – work with Council to ensure sustainable building measures are maintained and if needed, strengthened	From Quarter 3: 2013

SUMMARY

Tourism Noosa will continue to take a destination management approach and the goals and actions as set out in this plan will bring more resources to industry development and sustainability while balancing with a targeted approach to marketing.

Tourism Noosa management will report to the Board on the progress of the Noosa Sustainable Destination Action Plan on a regular basis. The plan will be reviewed on a six-monthly basis.

Through evolving support for industry and taking a community leadership role in establishing and nurturing partnerships across all three priority areas, the key aims of increasing the economic value of tourism in the region and increasing the brand equity of the Noosa region will be achieved.

*Source: NVS/IVS June 2012

**Source: Report prepared by Economic and Market Development Advisors, based on 2009 figures – The Northern Region of the Sunshine Coast employed 7,834 direct, full-time equivalent jobs.

^Destination Q partnership agreement: <http://www.destq.com.au/PDF%27s/QldGov-QTIC-PartnershipAgreement2012.pdf>

^^ Tourism Satellite Account indicates for Queensland a new FTE job is created for every \$74,000 (approx.) in direct additional expenditure, through Tourism Research Australia

^^^ Paid, Owned and Earned Media (POEM) is used to classify media in the digital and social era. It covers paid brand messaging; engaging media created by a brand such as blogs, Facebook, tweets etc; and positive, unpaid brand messaging such as bloggers, journalists and Facebook updaters.

△ Tourism Research Australia reweighted expenditure data in 2013 which resulted in across-the-board downward revisions (total Noosa spend was reweighted from \$867m to \$834m), impacting on this measure. Tourism Noosa will review and re-evaluate targets in line with state and national performances, external events and other impacts on visitation.

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