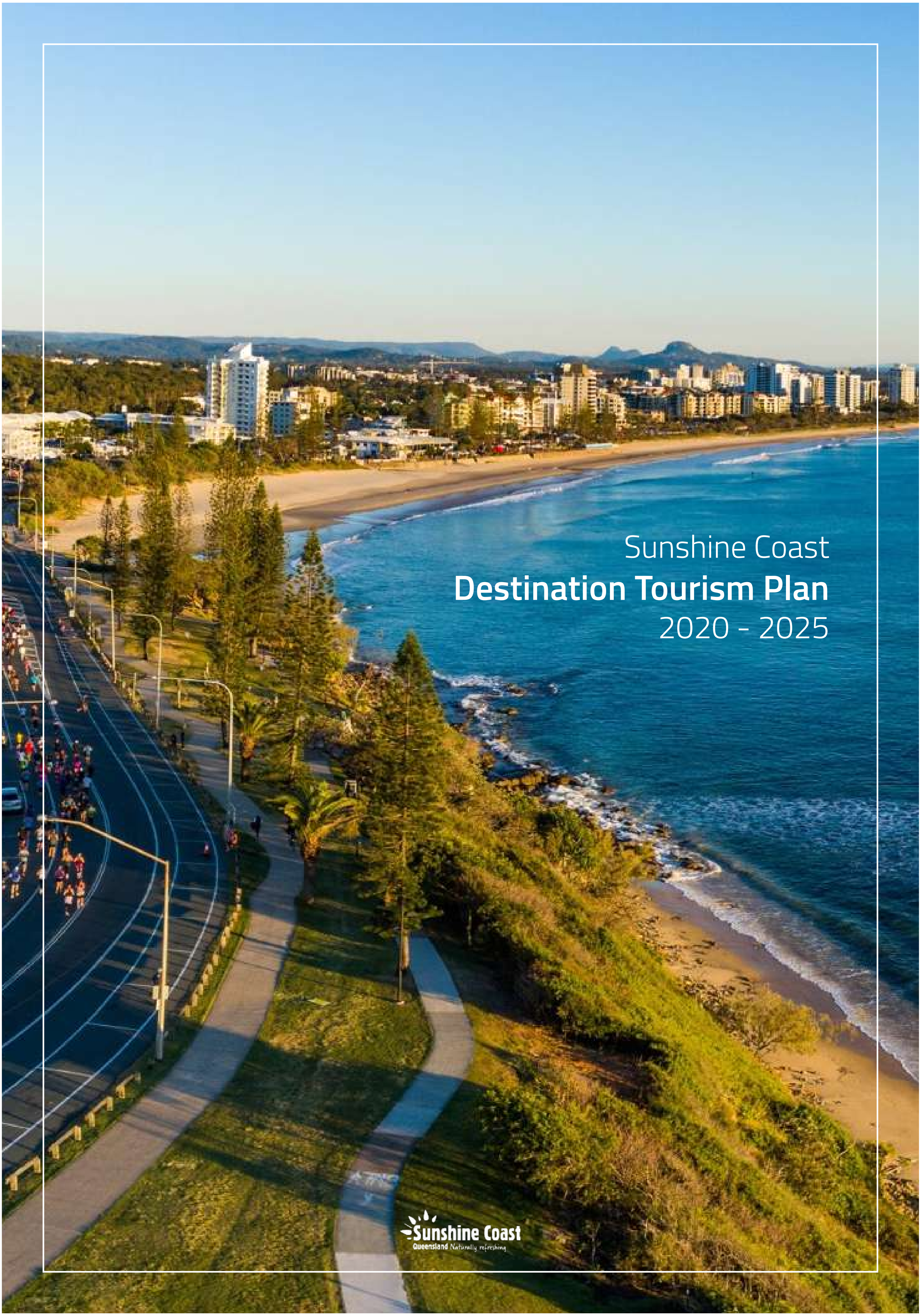

Sunshine Coast
Destination Tourism Plan
2020 - 2025

Sunshine Coast Queensland Naturally refreshing

URBAN ENTERPRISE

This Destination Management Plan (DMP) was prepared by Urban Enterprise in collaboration with Visit Sunshine Coast (VSC).

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DISCLAIMER

ACRONYMS

AAGR	Average Annual Growth Rate
ALOS	Average Length of Stay
DTP	Destination Tourism Plan
FIT	Free Independent Traveller
GRP	Gross Regional Product Gross
GVA	Value-Added International
IVS	Visitor Survey Local
LGA	Government Area Local
LTO	Tourism Organisation National
NVS	Visitor Survey
P.A.	Per Annum
RTO	Regional Tourism Organisation
SA2	Statistical Area Level 2
TEQ	Tourism & Events Queensland
TRA	Tourism Research Australia
VFR	Visiting Friends and Relatives
VIC	Visitor Information Centre Visit
VSC	Sunshine Coast
YE	Year Ending

GLOSSARY OF TERMS

Statistical Area Level 2

These are medium-sized, general-purpose, geographical areas. Their purpose is to represent a community that interacts together socially and economically. Data from TRA and the ABS are available at an SA2 level, noting that the SA2 is the smallest area for the release of data.

Coastal Area

An area that borders the ocean shoreline and is proximate to beaches as well as urban centres.

Hinterland Area

An inland area (away from a coast/shoreline) that is typically remote from major metropolitan centres.

Domestic Day Trip Visitors

Those who travel for a round trip distance of at least 50 kilometres, are away from home for at least 4 hours, and who do not spend a night away from home as part of their travel. Same day travel as part of overnight travel is excluded.

Domestic Overnight Visitors

People aged 15 years and over who undertake an overnight trip of one night or more and at least 40 kilometres away from home are referred to as overnight visitors. Only those trips where the respondent is away from home for less than 12 months are in scope of the NVS.

International Visitor

A person is defined as an international visitor to Australia if they are currently a resident overseas, have been in Australia for less than one year and are aged 15 years or over.

RESPONSE TO THE COVID-19 CORONAVIRUS PANDEMIC

In early 2020, Australia was exposed to the COVID-19 pandemic. The pandemic has had an enormous impact on the tourism industry due to lockdowns, closed borders, and government-imposed restrictions. At the time of writing this document, borders remain closed and tourism businesses are still suffering. The Sunshine Coast tourism industry is currently reliant on visitation from QLD and South Australia and is still limited by COVID-19 restrictions and social distancing.

Tourism businesses on the Sunshine Coast have suffered enormous losses of revenue and in many cases, long term staff have also been lost. This will have a long-term impact on the industry, which VSC has considered at length to deliver a future proof plan.

VSC is responsible for the **Visit Sunshine Coast Strategic Plan 2018 - 2022** and the organisation takes a leadership role in preparing the region's **Destination Tourism Plan 2020 - 2025.**

VSC has quickly adapted in response to the pandemic to ensure that our Strategic Plan remains agile and delivers outcomes that are needed for the region both now, and into the future. VSC Management revisited the objectives of the Strategic Plan to overlay a COVID-19 risk profile. This risk profile allows us to consider the changes needed to achieve outcomes, where COVID-19 may have had an impact. VSC also rewrote the **2020 - 2021 Marketing Plan** in response to the current environment. These Strategies and Plans will be delivered in line with additional funding received from Tourism & Events Qld and the QLD State Government to assist with the recovery of the Sunshine Coast Tourism Industry.

The deliverables of the Destination Tourism Plan remain relevant as strategies and infrastructure requirements remain the same. The five-year plan was built with extensive research into best practice tourism, consumer insights and trends and infrastructure requirements to drive to drive visitation, expenditure, and overnight stays.

The Sunshine Coast remains in a strong position due to our open spaces and clean environment, which lends well to the desires of travellers during the COVID-19 pandemic. VSC will continue to adapt and change to suit the current environment for the overall benefit of the Sunshine Coast Tourism Industry.

EXECUTIVE SUMMARY

BACKGROUND

Visit Sunshine Coast (VSC) commissioned Urban Enterprise to develop a Destination Tourism Plan (DTP) to provide direction for the Sunshine Coast visitor economy from 2020 to 2025.

The DTP is designed to be a shared resource for industry, government stakeholders, and funding agencies to guide management and investment across the Sunshine Coast. The purpose of this document is to outline potential strategies, investment opportunities, as well as realistic targets to help grow the Sunshine Coast tourism industry. More specifically, the key project objectives are summarised below:

- Outline the potential **value** of tourism and events to the wider regional economy;
- Identify and capitalise on any unique features of the Region that provide a distinct **competitive advantage**;
- Identify unique experiences, product and event development **opportunities**;
- Confirm a clear tourism strategy and direction for **development** and **growth** of the Region; and
- Provide clear, unambiguous measurable **targets**.

THE REGION

The Sunshine Coast Region (the Region) is large and diverse, covering over 10,000 sqm in total area and is strategically located in between Brisbane to the south and the Fraser Coast to the north. Due to its diversity of product/experiences and varying visitor markets, the DTP analyses the Region by sub-region (i.e. Sunshine Coast, Noosa and Gympie LGAs) as well as coastal versus hinterland spatial areas.

VISITOR PROFILE

In 2019, the Sunshine Coast region received just over 11 million visitors. Of these visitors, the majority are domestic daytrip visitors (62%) followed by domestic overnight visitors (35%). International visitors represent 3% of the visitor market, totalling 322,000 visitors, which is a record result for the Region.

At a sub-regional level, the most popular destination is the Sunshine Coast LGA, attracting over two-thirds of total annual visitors to the Region in 2019, followed by Noosa (22%) and Gympie (12%).

Visitation has grown significantly in the region over the past five years, by around 2.2 million visitors since 2014 (or 5.7% per annum). This growth is expected to continue at a similar rate, which could result in an additional 6 million visitors by 2029 (totalling visitation at 17.4 million). Therefore, to facilitate this growth, as well as extract more value from the visitor economy, the region requires enhancement of existing product and additional investment in new product and tourist-related infrastructure.

VISITOR EXPERIENCE AND PRODUCT PROFILE

The region has a variety of product strengths that define the perceptions of sub-regions, and appeal to a variety of markets. A full table, illustrating the relative product strengths of each sub-region, differentiating between the coastal and hinterland areas, is featured later in this report. These are categorised as **primary**, **secondary** and **emerging** product strengths.

Across the Region, **nature-based and outdoor** experiences were identified as the primary product strengths, based on the range of iconic beaches along the coast and unique national and state parks across the hinterland. Other primary strengths include **retail, events and festivals**, and **sport and recreation** (including major attractions/theme parks).

VISITATION HIGHLIGHTS

11M+	5.7%	17.4M
Visitors to the Sunshine Coast Region in 2019.	Growth in Visitation per annum since 2014	Projected Visitors to the Sunshine Coast Region in 2029.

However, the majority of tourism product and experiences are in the coastal areas, therefore, more investment is needed in product/infrastructure across the hinterland to improve the visitor experience and encourage visitor dispersal. In addition, further development of the secondary and emerging strengths (e.g. food & beverage, arts & culture, health & wellbeing) has the potential to transform these products into primary strengths to help grow the visitor market and increase visitor yield.

ACCOMMODATION PROFILE

The Region's accommodation supply is predominantly 'upscale & upper midscale' quality serviced apartments that cater to the family and VFR markets. There is a relative lack of 'luxury & upper upscale' facilities, particularly internationally branded hotels & resorts, which typically attracts high-yielding domestic and international markets (through brand recognition, loyalty programs, etc.). Given the limited supply of these full-service hotels (inc. business facilities), business travellers are less likely to stay overnight, reducing potential visitor yield.

The Region has attracted little accommodation investment in recent years, in terms of upgrades to existing stock and provision of new accommodation to meet contemporary market demand. This has catalysed significant growth in private short-term holiday rentals (e.g. Air BnB), which provides over 5,000 properties and supports over 150,000 guests.

Significant accommodation investment is required across the Region to improve the facilities, meet growth in overnight visitation and attract high-yielding markets. It has been estimated at least 4,746 additional rooms are required over the next ten years to meet future demand for commercial accommodation.

KEY VISITOR MARKETS

The key visitor markets for the Sunshine Coast are high-yielding visitors, with the purpose of increasing the value of the visitor economy. The region already receives a high volume of visitation. Therefore, to drive growth in the tourism industry and overcome capacity issues, the regional focus should be on extracting maximum value (i.e. visitor expenditure) from visitors. The key visitor markets include:

- **Domestic High-Value Travellers (HVT).** HVT spend more than the average visitor and, as such, align with state-wide objectives to increase the level of visitor expenditure across Queensland.
- **International Experience Seekers.** Experience seekers are not characterised by nationality but seek out authentic experiences (in regional areas) which are engaging and have an educational element
- **Asian Free Independent Travellers.** The number of independent and self-drive Asian visitors has increased in recent years (above other inbound markets) and will provide new opportunities for regional destinations. The growth of the Asian market is expected to be driven by the airport expansion project.

STRATEGIC CONSIDERATIONS

Key considerations and issues for the development of the DTP are outlined below. These help identify strategic themes and future directions to sustainably grow the tourism industry.

- *Leveraging from Sunshine Coast's Strategic Location.*
- *Accommodating for Growth in Tourism.*
- *Visitor Value over Volume.*
- *The Sunshine Coast Airport Expansion Project.*
- *Regional Approach & Collaboration.*
- *Encouraging Visitor Dispersal.*
- *Activating the Hinterland.*
- *Development of Eco-Tourism.*
- *Importance of Tourism Sustainability.*
- *Food & Beverage Investment.*
- *Leveraging Events.*
- *Strategic Marketing & Regional Positioning.*
- *Developing Arts & Culture Experiences (inc. Indigenous).*
- *Industry Development.*
- *Increasing VSC Operating Budget.*

COMPETITIVE ADVANTAGES

When discussing the competitive advantages of the Sunshine Coast, it is not one single (or unique) product strength; but rather a **collection of characteristics** that make it a highly desirable destination. These include:

- **Accessibility and connectivity** – ease of access from key source domestic and international markets.
- **Tourism hubs** – multiple locations that have strong clusters of accommodation, hospitality services and tourism product.
- **Product rich** – the number and quality of tourism product and experiences on offer.
- **Nature-based assets** – high-quality and attractive nature-based assets.
- **Tourism services** – a large resident workforce supports industry in providing tourism/hospitality services that caters to visitor needs.

This set of destination attributes is the result of the Region having a combination of *natural amenity* (e.g. beaches and hinterland) and a *significant population base* (over 400,000 residents). Visitors can, therefore, experience the natural environmental features of the Region with all of benefits of service provision and infrastructure associated with a large urban centre.

STRATEGIC FRAMEWORK THEMES

The following outlines the **tourism-specific themes** that directly relate to the tourism industry and can develop/ enhance the Region's competitive advantages. These projects can be delivered by VSC and/or supported via partnerships with industry and government.

Theme 1: Strategic Marketing

Strategically position the Region by promoting the competitive advantages to identified target markets.

Theme 2: Market Ready

Ensuring the tourism industry can support and facilitate visitor growth in identified target markets.

Theme 3: Regional Collaboration

Strengthen the Region by identifying targeted linkages and opportunities (through a coordinated approach) to drive tourism development and increase visitor yield.

Theme 4: Leveraging Product Strengths

Ensure that the Region's tourism assets are fully utilised and optimised to attract target markets and generate increases in visitation and visitor yield.

In addition, the following **tourism-enabling themes** can indirectly impact tourism through major infrastructure and/ or economic development projects. These themes require third-party implementation, with VSC playing a supporting role.

Theme 5: Major Infrastructure Development

Develop major public sector infrastructure projects to support economic growth within the key urban centres and accommodate projected increases in visitation.

Theme 6: Accommodation

Improve and diversify the accommodation offer in the Region matched to contemporary market demands and future visitation needs.

Theme 7: Experience & Product Development

Improve and develop the Region's tourism attractions to enhance the visitor experience, support growth in visitation and increase yield.

COMPETITIVE ADVANTAGES

Accessibility and Connectivity

Tourism Hubs

Product Rich

Nature-based Assets

Tourism Services

SUNSHINE COAST PRIORITY PROJECTS

T1. TOURISM SPECIFIC PRIORITY PROJECTS

The tourism-specific priority projects and lead organisation/s are outlined below:

THEME	PROJECT	LEAD ORGANISATION
Strategic Marketing	Project 1: Regional Marketing Research and Strategy	Visit Sunshine Coast
	Project 2: Reinforcement of the Sunshine Coast Brand	Visit Sunshine Coast
Market Ready	Project 3: Hospitality & Tourism Industry Development	Visit Sunshine Coast
	Project 4: Increase Cultural Support for International Markets	Visit Sunshine Coast /TEQ
	Project 5: Refresh Sunshine Coast	Local Councils/Industry Members
Regional Collaboration	Project 6: Seek Additional Sources of Funding	Visit Sunshine Coast
	Project 7: Continue Partnership between Tourism Governance Bodies	Visit Sunshine Coast
	Project 8: Continue the Sunshine Coast Aviation Partnership	Visit Sunshine Coast
Leveraging Product Strengths	Project 9: Cycle & Trail Tourism Strategy	Visit Sunshine Coast
	Project 10: Indigenous Cultural Tourism Strategy	Traditional Owner Groups
	Project 11: Promoting Accommodation Investment	Local Councils
	Project 12: Eco-Tourism Enhancement & Awareness	Local Councils
	Project 13: Facilitate Collaboration between Visitor Attractions	Industry Members

T2. TOURISM-ENABLING PRIORITY PROJECTS

The tourism-enabling priority projects and lead organisation/s are outlined below

THEME	PROJECT	LEAD ORGANISATION
Major Public Infrastructure Development	Project 14: Sunshine Coast Airport Expansion Project	Palisades (Sunshine Coast Airport)
	Project 15: Sunshine Coast Light Rail Project	Sunshine Coast Council
	Project 16: Sunshine Coast Entertainment, Convention & Exhibition Centre	Sunshine Coast Council
	Project 17: International Broadband Network (Digital)	Sunshine Coast Council
	Project 18: Maroochydore City Centre	Sunshine Coast Council
Accommodation	Project 19: Investment in additional accommodation facilities (various)	Private Sector/Local Councils
Experience & Product Development	Project 20: Noosa Regional Art Gallery & Cultural Centre	Private Sector/Noosa Council
	Project 21: Sunshine Coast Hinterland Regional Art Gallery	Private Sector/Sunshine Coast Council
	Project 22: Big Pineapple Masterplan	Private Sector
	Project 23: Glasshouse Mountains Precinct Masterplan	Sunshine Coast Council
	Project 24: Pumicestone Passage Precinct Masterplan	Sunshine Coast Council
	Project 25: Public Art Strategy	Sunshine Coast Council/Noosa Council

PART A

BACKGROUND RESEARCH & ANALYSIS

INTRODUCTION

BACKGROUND

Urban Enterprise has prepared a Destination Tourism Plan (DTP) for Visit Sunshine Coast (VSC) to provide direction for the Sunshine Coast visitor economy from 2020 to 2025. The purpose of this DTP is to outline potential strategies, investment opportunities, and realistic targets to help grow the Sunshine Coast tourism industry. This document is designed to be a shared resource for industry, government stakeholders, and funding agencies to guide management and investment across the Sunshine Coast.

PROJECT OBJECTIVES

The key objectives of the DTP are summarised below:

- Outline the potential **value** of tourism and events to the wider regional economy;
- Identify and capitalise on any unique features of the Region that provide a distinct **competitive advantage**;
- Identify unique experiences, product and event development **opportunities**;
- Confirm a clear tourism strategy and direction for **development** and **growth** of the Region; and
- Provide clear, unambiguous measurable **targets**.

THE ROLE OF A DESTINATION TOURISM PLAN

The best practice approach to Destination Tourism, is through a holistic process that ensures tourism adds value to the economy, social fabric and ecology of the community[1]. Tourism should be viewed as a key driver of economic growth, but equally it should be sustainably managed to ensure it leaves a legacy for future generations. The destination management framework adopts the following 'best practice' process, which was used by Urban Enterprise to generate key outcomes for this DTP.

[1] As defined by the Australian Regional Tourism Network (ARTN).
[2] ABS Census 2016

APPROACH

The Region

The Sunshine Coast region (the Region) – illustrated on the right – is large and diverse, consisting of the following sub-regions: Sunshine Coast LGA; Noosa LGA; and Gympie LGA.

The Region covers over 10,000 km² in total area and is strategically located in between Brisbane to the south and the Fraser Coast to the north. Its proximity and connection to Brisbane is a notable advantage as it provides access to the densely populated economic centre of South-East Queensland.

The Sunshine Coast region has a significant population base of over 400,000 (comprising 9% of Queensland's total population)[2], with over three quarters of residents residing in the Sunshine Coast council area. This provides for a large resident workforce that can support the tourism industry to deliver services that caters to visitor needs.

SUBREGIONAL APPROACH

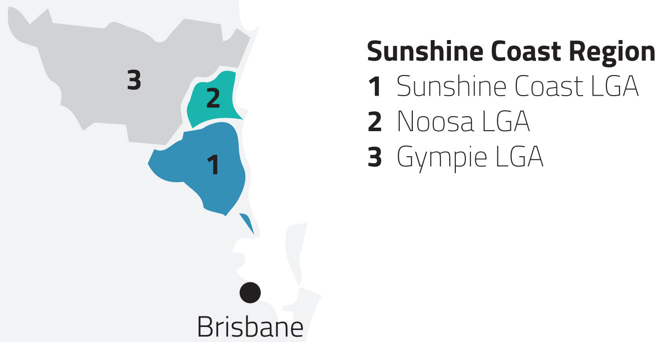
Due to the large geographic size of the Region, diversity of product/experiences and varying visitor markets, it is necessary to provide spatial analysis and strategic direction at the:

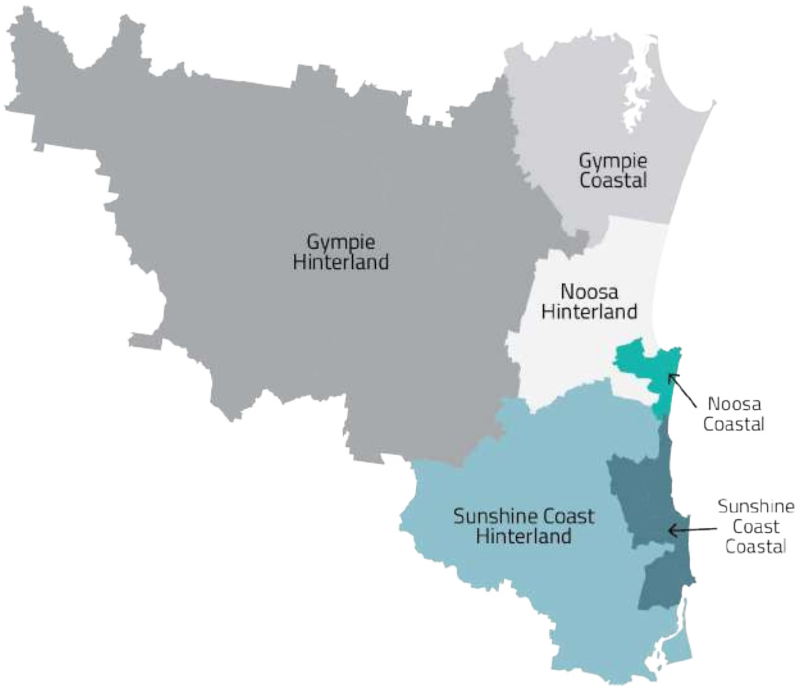
- Sub-regional (i.e. Local Government) level; and
- Within each sub-region, as defined by the distinct '**coastal**' and '**hinterland**' areas. These areas are diverse and typically provides different products and experiences for tourists.

An illustration of the sub-regional and spatial approach is shown in on the right. However, the DTP will also be developed through a holistic approach that provides overarching strategies and clear developmental direction for the entire region.

F1. SUNSHINE COAST TOURISM REGION & SUBREGIONS

Source: Urban Enterprise, 2019





THE PROCESS

STAGE ONE

Background Research and Visitor Data

- Review of relevant policies and strategies.
- Visitor data analysis utilising TRA data and information from TEQ.
- Product and experience review based on desktop analysis and information provided during consultation.
- Economic and Community profile based on desktop analysis and TRA data.
- Tourism Governance assessment based on desktop analysis and information provided during consultation.

STAGE TWO

Consultation and Information Gathering

Consultation was undertaken with over 40 government, tourism and industry stakeholders over June-August 2019, including in-region workshops and telephone consultation. This included the following stakeholder groups:

- Local Councils;
- Tourism Noosa;
- Gympie Industry;
- Noosa Industry;
- Sunshine Coast Industry;
- Major Attractions;
- Major Accommodation Providers;
- Sunshine Coast Airport;
- Tours and Experience Operators; and
- Food & Beverage Providers.

STAGE THREE

Key Finding & Strategic Directions Presentation

Based on the background research and consultation, a DTP framework and draft project list was prepared and presented to the VSC management team and Board for review and feedback.

STAGE FOUR

DTP Development

Development of the Sunshine Coast DTP framework including overarching strategic development themes, detailed project opportunities and key delivery actions.

PLAN LAYOUT

The report is set out according to the following structure.

PART A: BACKGROUND RESEARCH AND ANALYSIS

The background section provides a summary of the following:

- Review of the key strategies and policies informing the development of the DTP and providing strategic context;
- An overview of tourism governance, including the roles and responsibilities of organisations that administers/governs tourism across the Region;
- Assessment of the economic impact of the Sunshine Coast visitor economy, including visitor trends over the past five years using Tourism Research Australia (TRA) data;
- Comparable case studies across Australia to provide benchmarks for visitor economy growth and identify key drivers for growth;
- A product and experience profile for the Region, identifying the regional and sub-regional strengths and weaknesses;
- Identification of key target and emerging visitor markets; and
- Identification of the Region's competitive advantages.

PART B: DTP FRAMEWORK

The DTP Framework focuses on the Region's future directions and core product development opportunities, including:

- An overview of the strategic considerations and strategic development themes for the Sunshine Coast Region that respond to the needs of the tourism sector;
- A summary of the Project Assessment Methodology, and how project opportunities are prioritised; and
- A summary of priority projects and destination development opportunities, at both a regional and sub-regional level, which will strengthen the visitor economy.

STRATEGIC CONTEXT

The development of the Sunshine Coast DTP is supported by a range of Federal, State, Regional and Local Government policies. As such, future marketing strategies and product development opportunities, designed to drive growth in the Sunshine Coast visitor economy, should align with the following strategic policies and objectives (summarised right).

Level	Objectives
Federal	▪ Focus on increasing investment in the tourism industry and developing appropriate transport for visitors.
State	▪ Growth in the Queensland overnight visitor market is a key objective; and ▪ Providing world class products and iconic experiences that can attract a global audience.
Regional	▪ Visit Sunshine Coast seeks to attract high value travellers through development of genuine, authentic and 'hero' experiences, whilst also focusing on the Region's strengths in nature-based and food tourism.
Subregional	▪ Establishing a strong and diverse events calendar; ▪ Increasing visitor spend by providing high-quality tourist infrastructure and product; ▪ Ensuring a sustainable tourism industry ▪ Leveraging off existing assets, specifically nature-based, wildlife and food product; and ▪ Delivering high-quality experiences.

F2. STRATEGIC CONTEXT SUMMARY
Source: Urban Enterprise, 2019

TOURISM GOVERNANCE

Tourism governance for the Sunshine Coast region is administered through both regional and local level organisations. While regional tourism is governed by a single organisation – Visit Sunshine Coast – the tourism industry for individual sub-regions is supported by several LTOs, councils and chambers of commerce (see Figure F3).

Overall, there are significant resources dedicated to tourism across the Region. Excluding chambers, there are at least six organisations (councils and tourism bodies) with over 50 FTE supporting over 600 members.

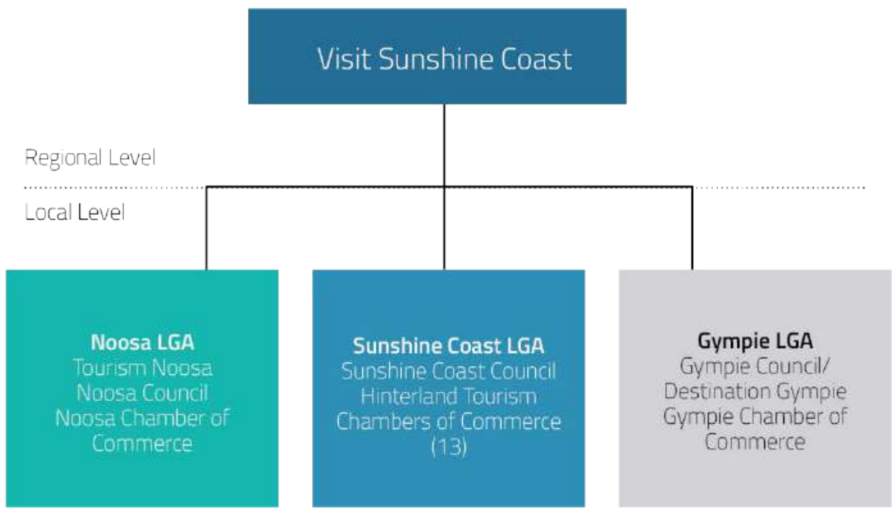
Due to the overlap of roles and responsibilities, every effort should be made to ensure these resources are not duplicated to ensure a more effective and efficient approach to support tourism, including initiatives relating to:

- Marketing and promoting the Region;
- Industry development (to upskill the tourism workforce/operators to support visitors); and
- Product development (to enhance the visitor experience).

Working with several tourism organisations simultaneously is likely a key underlying cause of the existing fragmentation of Sunshine Coast's tourism industry and promotional efforts. Therefore, it is recommended that a regional and more collaborative approach to tourism governance is adopted.

F3. SUNSHINE COAST TOURISM GOVERNANCE OVERVIEW

Source: Urban Enterprise, 2019



ECONOMIC IMPACT OF TOURISM

The Sunshine Coast tourism industry is a significant contributor to both the regional economy as well as the Queensland visitor economy, as shown in Table T3, the visitor economy contributes:

- $2.4 billion in Gross Regional Product, representing 11% of state tourism GRP;
- $2.2 billion in Gross Value-Addd, representing 11% of state tourism GVA; and
- 23,249 total tourism related jobs, representing 12% of state tourism employment.

This data was sourced from the TRA Satellite Account and is provided at an aggregate regional level.

ECONOMIC CONTRIBUTION BY INDUSTRY

The tourism-related industries within the Sunshine Coast that generate the largest direct contribution to GVA and employment are **food services, retail trade** and **accommodation**.

As shown in Table T4 the industries that contributed most to direct employment include food services (31% of total jobs), retail trade (18%) and accommodation (15%). This closely aligns with tourism GVA, which also generates value through similar industries, including accommodation (20% of total value), food services (18%) and retail trade (16%).

	Direct Contribution	Indirect Contribution	Total Contribution	% of QLD Tourism
Gross Regional Product ($M)	1,364	1,119	2,483	11%
Gross Value-Added ($M)	1,241	990	2,231	11%
Employment (Persons)	16,108	7,141	23,249	12%

T3. TOTAL ECONOMIC CONTRIBUTION OF TOURISM

Source: Sunshine Coast Tourism Satellite Account, 2016-17, TRA

Tourism Industry	Employment (persons)	Gross Value Added ($M)
Cafes, restaurants and takeaway food services	5,065	223.4
Retail trade	2,931	196.2
Accommodation	2,407	249.5
Travel agency and tour operator services	1,283	60.4
Clubs, pubs, taverns and bars	987	110.2
Air, water and other transport	651	119.5
Education and training	637	49.2
Other sports and recreation services	603	17.5
Road transport and transport equipment rental	596	20.4
All other industries	571	166
Cultural services	330	18.3
Rail transport	26	5.5
Casinos and other gambling services	23	5.0
Total (direct)	**16,108**	**1,241**

T4. DIRECT ECONOMIC CONTRIBUTION BY TOURISM INDUSTRY

Source: TRA NVS & IVS 2015-2019 YE June; Urban Enterprise, 2019

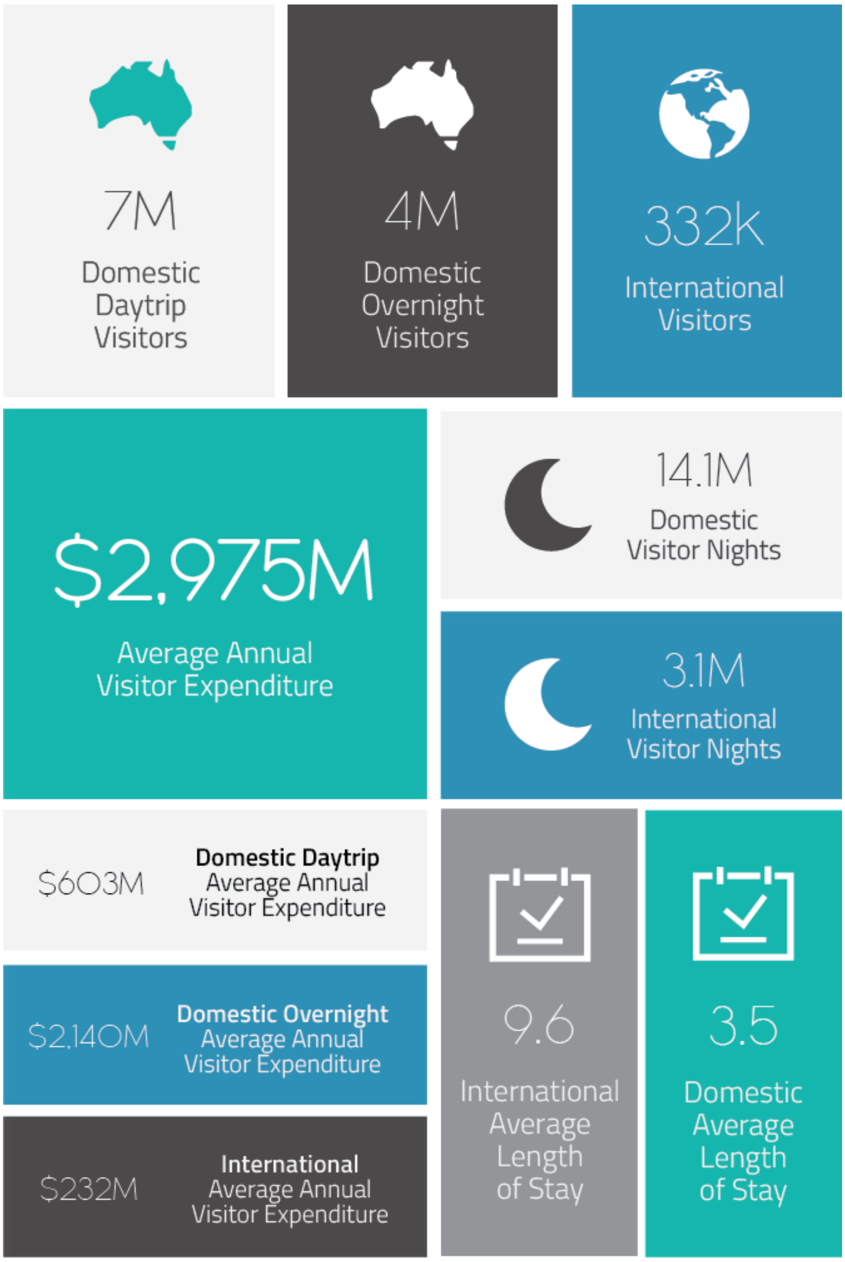
VISITOR PROFILE

VISITATION SUMMARY

In 2019, the Sunshine Coast region received just over 11 million visitors. Of these visitors, the majority are domestic daytrip visitors (62%) followed by domestic overnight visitors (35%). International visitors represent 3% of the visitor market, totalling 322,000 visitors, which is a record result for the Region.

Total visitor nights in the Region increased to record levels and experienced significant growth over the past five years. Total domestic nights totalled 14.1 million, representing growth of 5.3% p.a.; while international nights totalled 3.1 million, representing growth of 5.2% p.a.

Based on a four-year average (2015-2018), the Region's annual visitor expenditure (of almost *$3 billion)* is driven by domestic overnight visitors (72%), followed by domestic daytrip visitors (20%); and international visitors (8%).



F4. VISITATION SUMMARY

Source: TRA NVS & IVS 2015-2019 YE June, Note: Visitor expenditure figures are based on a 4- year average from 2015 to 2018 YE Dec.

VISITATION TRENDS

SUNSHINE COAST REGION

Table T5 shows the growth in visitation for the Sunshine Coast, including each sub-region, over the past five years and benchmarked against the Queensland average. The Region has experienced steady growth in visitation of 5.7% p.a., which has been driven by international growth of 6.2% p.a. However, the annual growth rate has been relatively conservative compared to Queensland (6% p.a.).

Although international visitation to the Region is strong, domestic visitation growth (overnight and daytrip) is less than the state average. Achieving growth in these visitor markets, particularly high-yielding domestic overnight visitors, will increase the value of the visitor economy. This can be achieved by (to be explored throughout this report):

- **Investment in high-quality visitor product & infrastructure; and**
- **Increasing brand awareness and promoting the Region's competitive strengths.**

SUB-REGIONS

At a sub-regional level, the most popular destination is the Sunshine Coast LGA, attracting over two-thirds of total annual visitors to the Region in 2019 (7.7 million). The attractiveness of the Sunshine Coast LGA is driven by popular tourist destinations such as Caloundra, Mooloolaba & Maroochydore along the coast, as well as key towns within the hinterland (e.g. Eumundi, Maleny and Montville). This is followed by Noosa, which received 22% of total annual visitors to the Region (2.5 million) and Gympie, with 1.3 million visitors (12% of total).

The Noosa sub-region has the strongest (proportional) overnight visitor market, with 47% overnight visitation; while the Sunshine Coast and Gympie markets are driven by domestic daytrip visitors.

Total domestic visitor growth for the Sunshine Coast and Noosa LGA's is slightly below the state average; however, there has been recent strong growth in the international market. While Gympie has experienced the strongest growth in domestic overnight visitation, reflecting a recent push to develop product and improve the local tourism industry.

	2015	2019	AAGR (%)
DOMESTIC DAYTRIP			
Sunshine Coast LGA	3.93M	4.96M	6.0%
Noosa LGA	1.07M	1.31M	5.1%
Gympie LGA	0.62M	0.76	5.0%
Sunshine Coast Region	5.63M	7.03M	5.7%
Queensland			5.9%
DOMESTIC OVERNIGHT			
Sunshine Coast LGA	2.14M	2.57M	4.7%
Noosa LGA	0.79M	1.00M	6.1%
Gympie LGA	0.33M	0.52M	12.3%
Sunshine Coast Region	3.20M	3.98M	5.6%
Queensland			6.1%
INTERNATIONAL			
Sunshine Coast LGA	114,141	157,121	8.3%
Noosa LGA	131,670	167,409	6.2%
Gympie LGA	45,336	49,553	2.2%
Sunshine Coast Region	253,644	322,092	6.2%
Queensland			5.5%
TOTAL			
Sunshine Coast LGA	6.19M	7.69M	5.6%
Noosa LGA	1.99M	2.48M	5.6%
Gympie LGA	0.99M	1.33M	7.4%
Sunshine Coast Region	9.08M	11.33M	5.7%
Queensland			6.0%

T5. SUNSHINE COAST VISITATION TRENDS 2015 - 2019

Source: TRA NVS & IVS 2015-2019 YE June; Note: To avoid double counting of visitors, who can visit multiple LGAs during a single trip, regional totals may not equal the aggregate figure for sub-regions.

VISITATION PROJECTIONS

Visitation is also projected to increase over the next ten years, which could result in an additional 6 million visitors by 2029, representing growth of 4.4% per annum (totalling visitation projections at 17.4 million), comprising:

- Daytrip visitor growth of 3.8 million visitors, or an AAGR of 4.4%;
- Domestic overnight visitor growth of 2 million or an AAGR of 4.1% p.a.; and
- International visitor growth of over 270,000 or an AAGR of 6.3% per annum

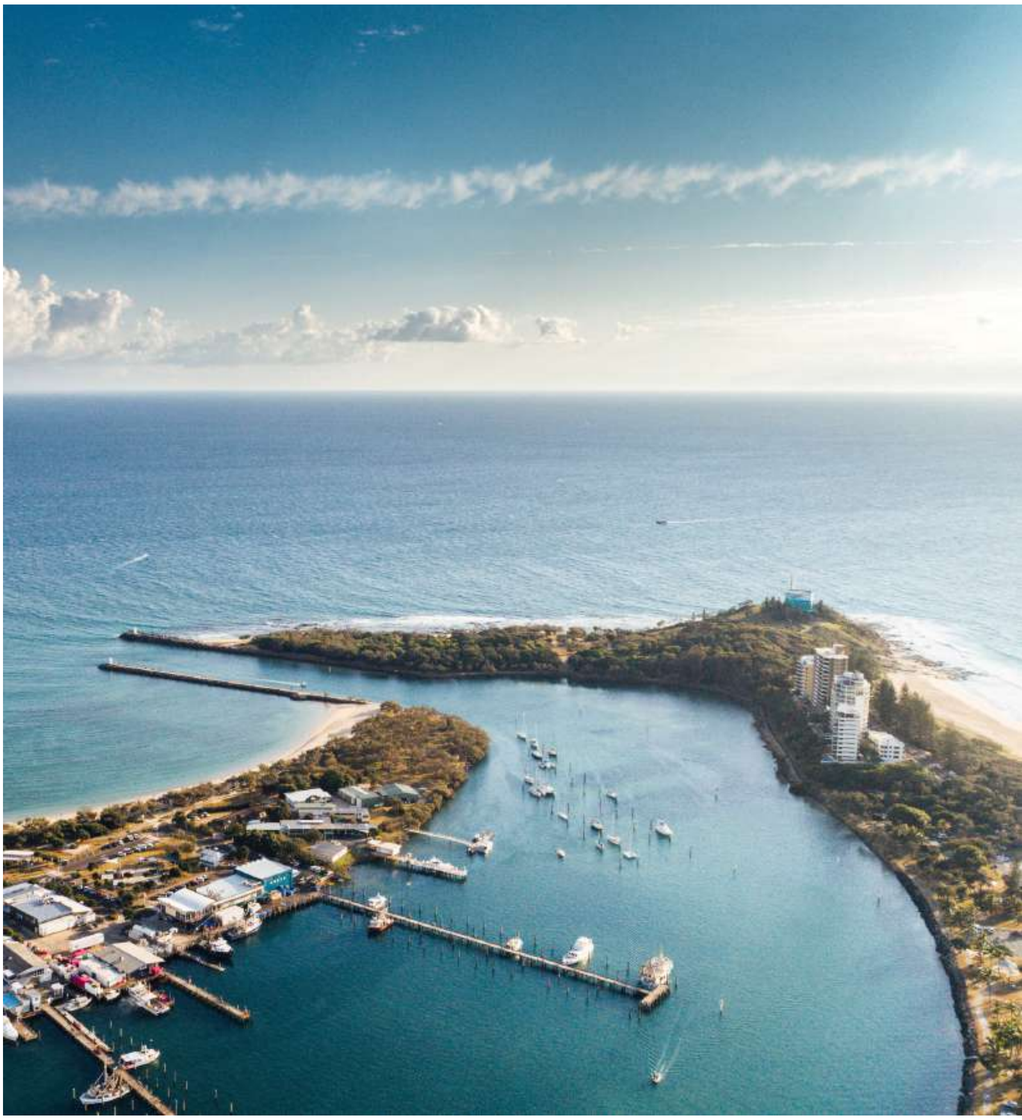
Therefore, to facilitate this growth, as well as extract more value from the visitor economy, the Region requires enhancement of existing product, investment in new product and tourist-related infrastructure, as well as enhanced strategic marketing initiatives to promote the Region's competitive strengths.

For this growth to be realised, it is important that new products, accommodation and experiences are developed, and infrastructure investment keeps pace with the growth of the Region.

	2019	2029	Growth	AAGR (%)
Domestic Daytrip	7.03M	10.79M	+3.75M	4.4%
Domestic Overnight	3.98M	5.97M	+1.99M	4.1%
International	0.32M	0.59M	+0.27M	6.3%
Sunshine Coast Region	11.33M	17.35M	+6.02M	4.4%

T6. SUNSHINE COAST VISITATION PROJECTIONS 2019 - 2029

Source: TRA NVS & IVS 2015-2019 YE June; Urban Enterprise, 2019



VISITOR PROFILE

Tables T7 to T9 summarises the profile of visitors to the Sunshine Coast, including daytrip, overnight and international markets. This information is disaggregated by LGA, and benchmarked against the regional average, to highlight key differentiating factors between sub-regions.

DOMESTIC DAYTRIP VISITOR PROFILE

The daytrip market comprises the majority of visitors to each sub-region, particularly the Sunshine Coast LGA (66% of total), with visitors primarily travelling from Brisbane for holiday purposes.

Daytrip visitors tend to be an older demographic and high-volume/low-yield market, generating 20% of total visitor expenditure ($603 million). These visitors primarily undertake social activities such as eating out, VFR and/or visiting the beach.

T7. DOMESTIC DAY TRIP VISITOR PROFILE

Source: TRA NVS & IVS 2015-2019 YE June (5-year average), Note: Visitor expenditure figures are based on a 4- year average from 2015 to 2018 YE Dec.

	Sunshine Coast	Noosa	Gympie	Tourism Region
EXPENDITURE				
Total Exp. per Annum	$415M	$110M	$79M	$603M
Avg. Exp. per Visitor	$94	$94	$108	$95
PURPOSE OF VISIT				
Holiday	57%	62%	50%	57%
VFR	26%	23%	23%	25%
Business	8%	7%	13%	8%
PLACE OF ORIGIN				
Brisbane	68%	53%	26%	61%
Other QLD	31%	47%	74%	39%
TRAVEL PARTY				
Adult Couple	34%	34%	39%	35%
Family Group	29%	28%	27%	29%
Travelling Alone	27%	29%	26%	27%
AGE PROFILE				
15 - 24	15%	20%	10%	16%
25 - 34	18%	15%	19%	18%
35 - 44	17%	14%	15%	16%
45 - 54	17%	21%	20%	18%
55+	33%	33%	35%	33%
ACTIVITIES				
Eating Out	54%	58%	53%	53%
Beach	31%	47%	32%	32%
VFR	31%	28%	31%	30%
Sightseeing	20%	22%	19%	19%
Shopping	18%	17%	17%	17%

DOMESTIC OVERNIGHT VISITOR PROFILE

The domestic overnight market is the highest-yielding market for the Region, generating 72% of total visitor expenditure ($2.1 billion). This market is particularly strong for the Noosa sub-region, reflected by a higher proportion of overnight visitors as well as higher average yields.

This market predominantly comprises holiday and leisure visitors from interstate, which typically stays in higher-end accommodation and spends more on retail and entertainment per trip.

T8. DOMESTIC OVERNIGHT VISITOR PROFILE

Source: TRA NVS & IVS 2015-2019 YE June (5-year average), Note: Visitor expenditure figures are based on a 4- year average from 2015 to 2018 YE Dec.

	Sunshine Coast	Noosa	Gympie	Tourism Region
EXPENDITURE				
Total Exp. per Annum	$1,292M	$701M	$146M	$2,140M
Avg. Exp. per Visitor	$598	$792	$318	$620
ALOS	3.4	4.1	3.1	3.6
Avg. Exp. per Day/Night	$178	$193	$104	$174
PURPOSE OF VISIT				
Holiday	51%	67%	57%	56%
VFR	37%	24%	28%	33%
Business	8%	6%	10%	8%
PLACE OF ORIGIN				
Brisbane	50%	42%	41%	47%
Other QLD	28%	20%	47%	28%
NSW	11%	17%	7%	12%
Victoria	7%	17%	3%	9%
TRAVEL PARTY				
Adult Couple	31%	32%	27%	31%
Family Group	22%	27%	19%	23%
Family & Relatives	20%	25%	30%	22%
Travelling Alone	24%	15%	21%	21%
AGE PROFILE				
15 - 24	16%	16%	19%	16%
25 - 34	17%	16%	18%	17%
35 - 44	17%	19%	16%	17%
45 - 54	18%	18%	15%	18%
55+	32%	31%	32%	32%
PRIMARY TRANSPORT				
Drive	85%	73%	96%	83%
Fly	13%	25%	2%	15%
ACCOMMODATION				
Non-Commercial	50%	64%	64%	49%
Hotels/Motels & Resorts	22%	11%	11%	22%
Self-Contained	21%	9%	9%	22%
Caravan & Camping	7%	14%	14%	8%
Backpacker/Hostel	0%	1%	1%	0%
ACTIVITIES				
Eating Out	57%	49%	38%	66%
Beach	56%	22%	39%	57%
VFR	48%	22%	35%	44%
Sightseeing	26%	8%	23%	28%
Shopping	25%	0%	13%	25%

INTERNATIONAL VISITOR PROFILE

The international market, although relatively small, generates the highest level of expenditure per visitor ($810), through higher average stays, which demonstrates
the value of this market for the visitor economy.

Noosa generates the highest proportion of international visitors, as well as the most visitor value in terms of yield ($94 per visitor per night), which is consistent with how it is positioned as an overnight destination.

This analysis demonstrates variability across the visitor markets based on sub-region. Therefore, to attract target markets or generate increases in visitor value/volume, different approaches must be considered based on area. As such, the Region should not adopt a 'one size fits all' approach to expanding the visitor economy.

T9. INTERNATIONAL VISITOR PROFILE

Source: TRA NVS & IVS 2015-2019 YE June (5-year average), Note: Visitor expenditure figures are based on a 4- year average from 2015 to 2018 YE Dec.

	Sunshine Coast	Noosa	Gympie	Tourism Region
EXPENDITURE				
Total Exp. per Annum	$129M	$88M	$15M	$232M
Avg. Exp. per Visitor	$1,018	$556	$296	$810
ALOS	13.1	6.0	4.5	9.9
Avg. Exp. per Day/Night	$78	$94	$66	$82
PURPOSE OF VISIT				
Holiday	51%	70%	74%	61%
VFR	37%	19%	13%	27%
Business	4%	2%	1%	3%
COUNTRY OF ORIGIN				
New Zealand	34%	14%	6%	23%
UK	15%	24%	23%	20%
Germany	8%	14%	21%	11%
USA	8%	7%	5%	7%
TRAVEL PARTY				
Adult Couple	45%	50%	59%	49%
Family Group	34%	27%	16%	29%
Family & Relatives	8%	14%	20%	11%
Travelling Alone	12%	8%	5%	10%
AGE PROFILE				
15 - 24	17%	33%	49%	26%
25 - 34	17%	28%	32%	23%
35 - 44	12%	10%	5%	10%
45 - 54	13%	9%	5%	11%
55+	42%	21%	9%	29%
ACCOMMODATION				
Non-Commercial	47%	21%	20%	26%
Hotels/Motels & Resorts	4%	33%	56%	23%
Self-Contained	24%	18%	2%	10%
Caravan & Camping	21%	17%	8%	11%
Backpacker/Hostel	7%	13%	16%	29%
ACTIVITIES				
Eating Out	97%	98%	97%	97%
Beach	89%	97%	97%	93%
Shopping	88%	88%	88%	88%
Sightseeing	83%	91%	94%	87%
National/State Parks	57%	84%	89%	72%

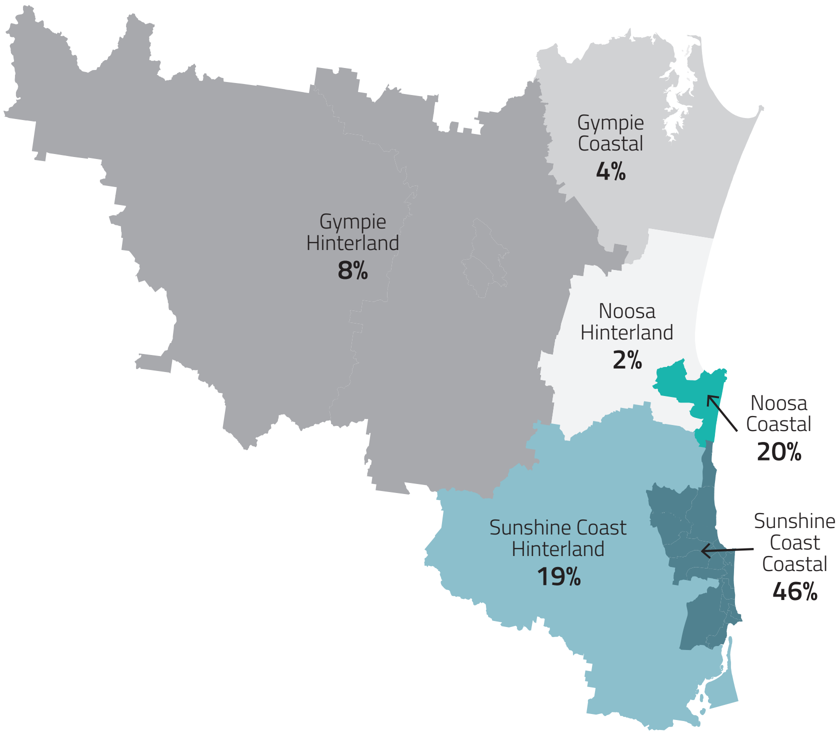
VISITOR PROFILE SPATIAL ANALYSIS

As shown in Figures F5 and F6, the coastal areas generate a significantly higher contribution to the Sunshine Coast visitor economy (compared to the hinterland), in terms of visitation (70% of total) and yield (77% of total expenditure).

There are several reasons behind the popularity and contribution of the coast to the tourism industry (which will be explored in subsequent sections of this report), including:

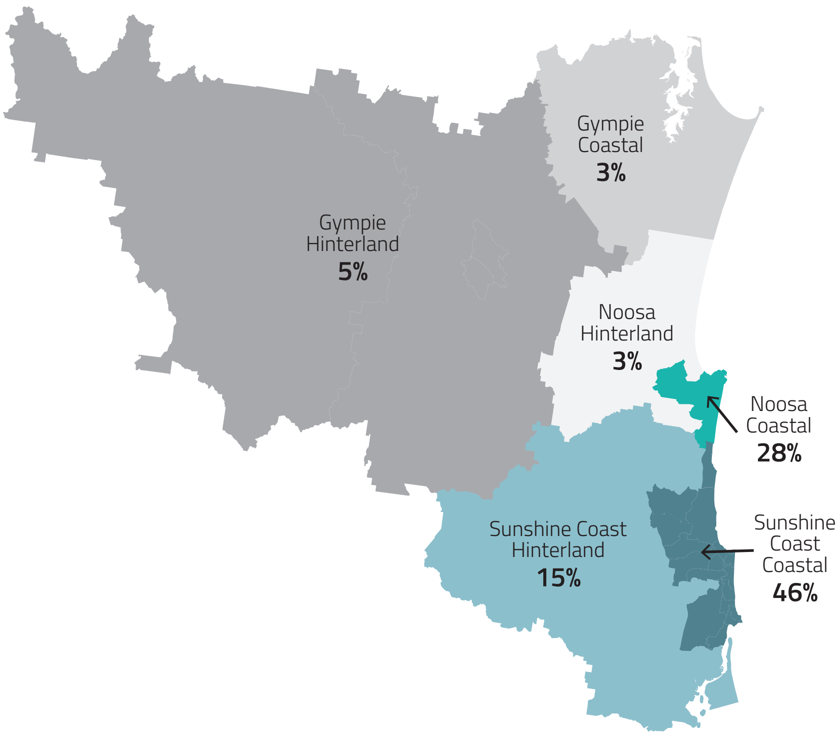
- The prevalence of major metropolitan centres, population base and services;
- Key tourism hubs within each sub-region, including Caloundra and Mooloolaba (Sunshine Coast LGA), Noosa Heads (Noosa LGA) and Rainbow Beach (Gympie LGA);
- Greater promotion and awareness of the beach areas; and
- Provision of high-quality tourist product, particularly accommodation.

This presents the opportunity to increase growth in the hinterland areas – which will contribute to visitor dispersal – through a combination of product and infrastructure investment, as well as increasing awareness through marketing and promotion activities.



F5. VISITOR PROFILE - SPATIAL PROPORTION OF VISITATION

Source: Urban Enterprise, 2019



F6. VISITOR PROFILE - SPATIAL PROPORTION OF EXPENDITURE

Source: Urban Enterprise, 2019

VISITOR ECONOMY BENCHMARKING

The following examines four comparable holiday destinations to benchmark the Sunshine Coast visitor economy, including **Gold Coast, Tropical North Queensland, Northern Rivers** and **Mornington Peninsula.**

Table T10 provides a comparison of the Sunshine Coast visitor market against these destinations.

When compared to the other Queensland destinations (Gold Coast and Tropical North Queensland), the Region generates the lowest average expenditure per visitor per night ($138), as it attracts a lower volume of high yielding overnight and international visitors

Although the Sunshine Coast is a popular holiday destination that compares favourably in terms of visitation, there is scope to increase the value and growth of the visitor economy through attracting high-yielding overnight visitors (domestic and international).

	Gold Coast	Tropical North Queensland	Northern Rivers	Mornington Peninsula	Sunshine Coast
Visitation (2019)	13.53M	6.04M	7.51M	6.98M	11.33M
Domestic (%)	92%	86%	96%	99%	97%
International (%)	8%	14%	4%	1%	3%
Average Annual Visitation Growth (2015-2019)	6.7%	5.7%	5.1%	11.6%	5.7%
Average Visitor Expenditure per Day/Night	$185	$196	$117	$105	$138
Visitor Origin (Domestic Overnight)	51% interstate	36% interstate	58% interstate	10% interstate	25% interstate

T10. VISITOR ECONOMY COMPARISONS

Source: Urban Enterprise, 2019; TRA NVS & IVS 2015-2019 YE March

VISITOR EXPERIENCE AND PRODUCT PROFILE

PRODUCT STRENGTHS

The Sunshine Coast has a number of strengths that define perceptions of tourism product and experiences and drive visitation to the Region.

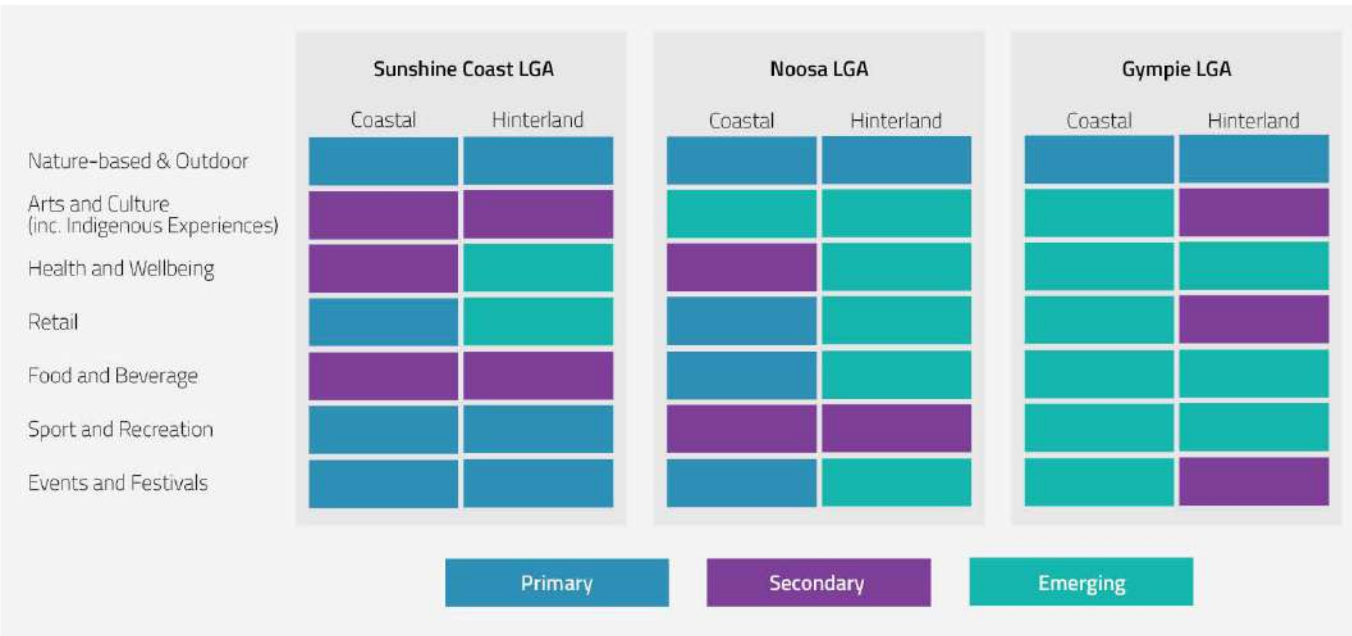
The figure below provides an overview of the relative product strengths for each sub-region destination, which is based on an audit of relevant product, activities and experiences available to visitors. The product and experience strengths are categorised as:

- **Primary** – well-established strengths, synonymous with the Sunshine Coast/sub-region and helps define the Region's competitive advantage.
- **Secondary** – tourism product that has a smaller presence throughout the Region but provides an important complementary offering for visitors. Secondary product typically requires further developments and improvements.
- **Emerging** – tourism product that is either new, or limited in the Region/ sub-region, but has the opportunity to develop over time.

The experience and product profile shows that the primary appeal of the Sunshine Coast as a visitor destination largely relates to the Region's nature-based assets (based on the product strengths). This includes the iconic coastline and attractive beaches, as well as the national/ state parks across the vast hinterland areas. Many tourism attractions and products have been developed to capitalise on these unique natural settings and provide a high-quality visitor experience.

Other primary tourism strengths across the Region have been identified as:

- Retail (e.g. shopping centres, plazas and beachside shopping strips);
- A popular and diverse events & festivals calendar; and
- Sport & recreation, driven by major recreation attractions.



F7. PRODUCT STRENGTHS

Source: Urban Enterprise, 2019

However, the majority of tourism product and experiences are in the coastal areas, which caters to the large proportion of visitors. Therefore, more investment is needed in product/infrastructure across the hinterland to improve the visitor experience and encourage dispersal.

In addition, further development of the secondary and emerging strengths (e.g. food & beverage, arts & culture, health & wellbeing) has the potential to transform these products into primary strengths. Additional investment and resources should, therefore, be targeted to areas of need to grow the visitor market and increase visitor yield.

Appropriate investment to improve existing (and develop new) products and experiences that leverage the Region's strengths will support growth of the target markets and enhance the visitor economy in terms of value and volume.

PRODUCT GAPS AND OPPORTUNITIES

Table T11 summarises the gaps in the Region's product and experiences, as well as the opportunities to improve the product strengths, enhance the visitor experience and facilitate growth in the tourism industry. The opportunities are designed to leverage the existing and emerging product strengths and increase the value of visitation by catering to the needs to the visitor market.

Please note the information included below reflects the gaps and opportunities at a regional level, taking into account the coastal and hinterland areas.

T11. SUNSHINE COAST REGION – PRODUCT GAPS & OPPORTUNITIES

Source: Urban Enterprise, 2019

CATEGORY	DESCRIPTION	GAPS & CONSTRAINTS	IMPROVEMENT OPPORTUNITIES
NATURE -BASED & OUTDOOR	▪ The Region has a diverse range of nature-based assets, including beaches along the coast ▪ National/state parks within the hinterland; and ▪ A variety of supporting outdoor activities (e.g. trails, bushwalking, watersports, etc.).	▪ The key gap for nature-based tourism in the hinterland is commissionable tourism product and supporting visitor amenities within the national/state parks. ▪ Commercial operators on the coast providing visitor activities and experiences (e.g. watersports hire, tours and water-based experiences).	▪ Greater investment in facilities and supporting infrastructure to strengthen the nature-based assets and activate the hinterland region. ▪ More signage and interpretation to enhance the visitor experience and cater to the international market. ▪ The hinterland could be better promoted by the tourism industry as a unique selling point for visitors, which would also contribute to visitor dispersal.
ARTS & CULTURE **(INC. INDIGENOUS)**	There are a small number of arts, heritage and cultural experiences on offer throughout the Region. These range from boutique markets to local/regional galleries and museums.	▪ There is a lack of arts and culture product across the Region, in terms of both quantity and quality. As such, this is not a driver of destination choice for visitors. ▪ Lack of product awareness. ▪ Lack of Indigenous cultural product.	▪ Private and public investment into iconic/large-scale galleries that serve as a destination for visitors (and encourages dispersal from the beach). ▪ Greater promotion of the Region's history and heritage to enhance visitor awareness. ▪ Investment in Indigenous cultural experiences and interpretation to grow cultural tourism and support Traditional Owners. ▪ Arts & culture tourism opportunities can be supported by local organisations (such as the Sunshine Coast Arts Board).

CATEGORY	DESCRIPTION	GAPS & CONSTRAINTS	IMPROVEMENT OPPORTUNITIES
HEALTH & WELLBEING	▪ The Sunshine Coast positions itself as the premier relaxation getaway in Australia by leveraging the Region's warm climate and natural assets. ▪ This is supported by a range of health & wellbeing product including day spas, retreats and integrated facilities within the accommodation stock.	▪ Health & wellbeing product is mainly located along the coast (integrated with the accommodation). ▪ There is a lack of dedicated facilities (e.g. day spas, retreats, etc) particularly within the hinterland.	▪ There are opportunities to leverage the natural assets and branding of the Sunshine Coast and develop more facilities across the Region. ▪ The promotion of the Region should also align with the range of experiences tailored to health and wellness ▪ The Sunshine Coast University Hospital precinct can increase health tourism to the Region.
RETAIL	Retail is a primary strength for the major coastal areas across the Sunshine Coast and Noosa LGAs and are prevalent in the coastal shopping strips and shopping centres in urban centres.	▪ Many of the retail centres are not tailored for visitors, particularly international markets seeking souvenirs and small gifts, etc. ▪ The retail shopping strips are out-dated and in need of refurbishment. Many outlets are also struggling per general trends in retail across Australia. ▪ There is a lack of quality retail product within the hinterland. Although there are retail precincts in Gympie town, these are not tailored for visitors.	▪ Greater investment in tourist-related retail facilities in coastal, including souvenir shops, gift shops, etc., could attract different markets and drive visitor yield. ▪ Development of boutique retail product could provide a point of difference and contribute to visitor yield.
FOOD & BEVERAGE	▪ The Region provides a range of food & beverage product for visitors, particularly within the coastal areas and urban centres. ▪ This includes the tourist-friendly restaurants along the coastal shopping strips in the Region's south, as well as the high-quality product in Hastings Street (Noosa). ▪ The prevalence of service clubs (e.g. RSL, surf clubs, etc.) also provide unique and local food and beverage experiences for visitors.	There are several gaps with tourist-related food & beverage product that constrains its ability to drive visitation/ visitor yield, including: ▪ Lack of local produce/farm-gates or 'destination dining' establishments, which is a growing trend in food-tourism; ▪ Lack of regional profile, in terms of marketing, branding, etc; ▪ Lack of unique and multi-cultural food & beverage offer in the coastal areas (particularly the Sunshine Coast LGA); ▪ Lack of general food & beverage facilities within the hinterland; and ▪ Not catering to the needs of visitors, in terms of quality of service or extending operations into the night-time and over weekends.	There are several opportunities that can be considered in order to attract the growing food & beverage tourism market: ▪ Greater promotion and branding for the Region as a 'food destination'; ▪ More boutique/destination food offers across the Region, particularly the hinterland as a unique offering (also encouraging dispersal); ▪ Improvements to the general hospitality service better cater to visitors, through staff training and industry development; and ▪ Extension of operation to drive the night-time and weekend economies.

CATEGORY	DESCRIPTION	GAPS & CONSTRAINTS	IMPROVEMENT OPPORTUNITIES
SPORT & RECREATION	There is a diverse range of sport & recreation product across the Region, including: ▪ Major recreation attractions (particularly within the hinterland); ▪ Golf courses; and ▪ Adventure and water-based sports that leverage the natural assets.	▪ Lack of product awareness and collaboration between operators and other tourism businesses (e.g. accommodation providers supporting/promoting recreation activities). ▪ Lack of supporting infrastructure or accessibility to these products, which are dispersed across the Region.	▪ Increased promotion of recreation activities available to visitors by both governing bodies (e.g. marketing collateral) as well as industry members (e.g. accommodation operators). ▪ Facilitation of collaboration between visitor attractions, to drive visitation and increase dispersal. ▪ Investment into additional adventure sports (e.g. mountain bike trail) to complement the existing product and surrounding natural assets.
EVENTS & FESTIVALS	▪ The Region generally provides a strong and diverse events & festivals calendar, with several iconic and popular events. This is driven by sport and recreation events, as well as music, cultural and food festivals, which provides a significant contribution to the visitor economy. The Sunshine Coast Events Board has helped strengthen the events program, which generates significant economic benefit for the Region. ▪ However, this is more prevalent in the coastal areas and emerging across the hinterland.	▪ Additional event-related infrastructure is needed to cater for growth in events, ranging from large-scale conference centres to smaller functions centres.	▪ Development of more high-quality event-related facilities could increase both the range and profile of events. ▪ Better promotion of existing events & festivals by industry members. ▪ Improve the range of events within the hinterland to encourage visitor dispersal.

ACCOMMODATION PROFILE

ACCOMMODATION PROFILE

A total of 316 commercial accommodation establishments – providing over 9,600 rooms and 1,625 caravan & camping sites/cabins – were included in an accommodation audit. The purpose of this is to identify potential gaps in accommodation provision, at a regional and sub-regional level, which will help determine future accommodation needs.

Table T12 categorises the stock by accommodation type and class, which shows:

- The accommodation supply is predominantly 'upscale & upper midscale'-quality serviced apartments that cater to the family and VFR markets. However, many of these facilities are strata-titled properties, which provides challenges for upgrading facilities and has contributed to an overall decline in quality.
- There is a lack of 'luxury & upper upscale' facilities, particularly internationally branded hotels & resorts, which typically attracts high-yielding international markets (through brand recognition, loyalty programs, etc.). In addition, given the limited supply of these full-service hotels (inc. business facilities), business travellers are less likely to stay overnight, reducing potential visitor yield.

	Number of Establishments	% of Total Establishments
Luxury & Upper Upscale Classes		
Hotels & Resorts	9	3%
Serviced Apartments	5	1%
Total Luxury & Upper Upscale Classes	*14*	*4%*
Queensland Average	-	15%
Upscale & Upper Mid Classes		
Hotels & Resorts	20	6%
Motels/Private Hotels/ Guest Houses	38	12%
Serviced Apartments	119	38%
Total Upscale & Upper Mid Classes	*177*	*56%*
Queensland Average	-	38%
Midscale & Economy Classes		
Hotels & Resorts	8	3%
Motels/Private Hotels/Guest Houses	47	15%
Serviced Apartments	37	12%
Holiday Parks	33	10%
Total Midscale & Economy Classes	*125*	*40%*
Queensland Average	-	48%
Total	**316**	**100%**

T12. SUNSHINE COAST REGION ACCOMMODATION PROFILE

Source: Urban Enterprise, 2019; Australian Accommodation Monitor 2018

There is also high degree of variability of stock across the coastal and hinterland areas, whereby there is a relative gap in hinterland accommodation (in terms of quantity and quality), contributing to a lack of visitor dispersal.

Therefore, it is likely that the development of more luxury and internationally branded hotels with business facilities – across the coast and hinterland – would satisfy demand for business travellers as well as high-yielding leisure visitors to the Region.

OCCUPANCY

The average occupancy for commercial accommodation within the Sunshine Coast is around 68% p.a., which is less than the Queensland average and other Queensland tourism regions including the Gold Coast, Tropical North Queensland and Brisbane.

Lower occupancy for the Sunshine Coast is the likely result of the following combined factors:

- A smaller business market, as many establishments do not provide the guest services typically demanded by corporate or business event partners; and
- The application of 2 and 3-night minimum stays by many serviced apartment operators, which limits the appeal to many potential overnight visitors.[4]

However, while occupancy is lower, Sunshine Coast accommodation generates higher revenues per available room (RevPAR), driven by a significantly larger average daily rate (ADR) per occupied room.

PRIVATE SHORT-TERM HOLIDAY RENTALS

There is also a significant number of private short-term holiday rentals in the Region (e.g. AirBnB), which provides over 5,000 rentals and supports over 150,000 guests[5] . This form of (non-commercial) accommodation, therefore, is important in supporting current and future visitation growth and alleviating any capacity issues.

	Occupancy	Total Revenue	ADR	RevPAR
Gold Coast	73%	$1,075m	$198	$143
Tropical North Queensland	78%	$697m	$180	$140
Brisbane	73%	$814m	$157	$114
Sunshine Coast	**68%**	**$483m**	**$217**	**$147**
Queensland	71%	$3,779m	$177	$126

T13. SUNSHINE COAST REGION ACCOMMODATION PROFILE

Source: Urban Enterprise, 2019; Australian Accommodation Monitor 2018

COMMERICAL ACCOMMODATION NEEDS FORECAST

PROJECTED DEMAND FOR ROOMS

Significant accommodation investment is required across the Region to meet projected growth in overnight visitation and support economic growth and sustainability. It has been estimated at least **4,746 additional rooms** are required over the next ten years to meet future demand for commercial accommodation.[6]

Investment in new world-class facilities as well as improvements in the quality of existing accommodation stock, would improve the Region's competitiveness as a destination for high-yielding leisure and business markets.

Additional commercial accommodation is required across the Region in order to meet projected growth in (domestic and international) overnight visitation and support economic growth and sustainability. Investment in new, fully serviced and high-quality accommodation is required if the Sunshine Coast is to improve its competitiveness as a destination for high-yielding leisure and business markets.

PROJECTED ACCOMMODATION TYPE

Table T14 provides an overview of specific accommodation typologies that might be required to support the projected demand in rooms (to meet visitation growth to 2029).

This information is a qualitative analysis based on the existing accommodation stock and gaps in supply identified throughout this section. This provides an outline of the potential scale and type of investment suited to the Region and should be used as an indicative guide for decision makers.

It should also be noted that:

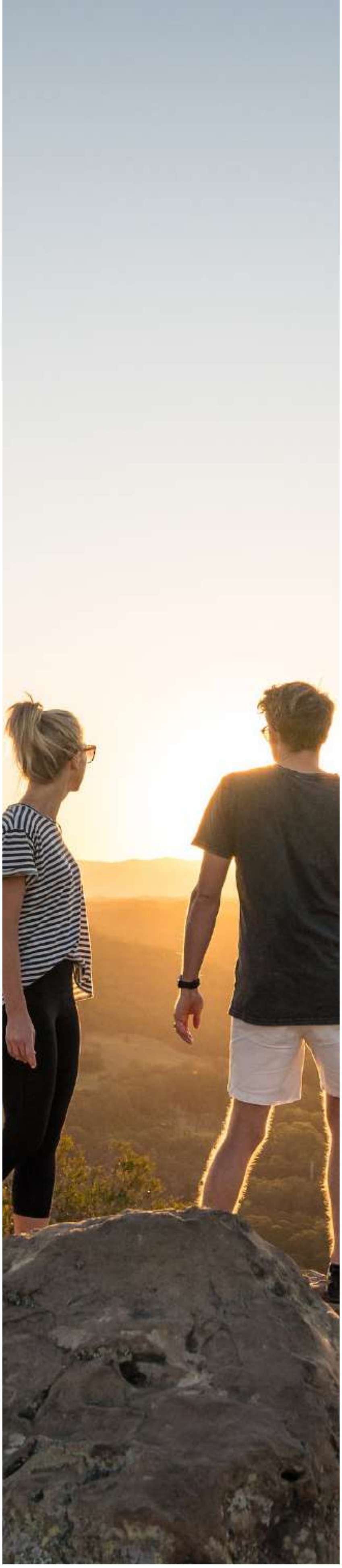
- A portion of the accommodation needs is likely to be met by expansion of existing establishments, in addition to development of new accommodation; and
- Future growth will also be supported by private short-term holiday rentals (e.g. Air BnB).

[4] Sunshine Coast Council, Sunshine Coast: Future Business Demand Assessment: 2018-2028, 2018
[5] AirDNA, 2019; Note: Only entire homes were included in the analysis
[6] Excludes private short-term holiday rentals

T14. PROJECTED ACCOMMODATION NEEDS BY TYPE 2019-2029

Source: Urban Enterprise, 2019

Accommodation Type	Description	Need (Additional Establishments)	Indicative Capacity (Rooms per Establishment)	Total Rooms	Location
Holiday Park	Rural areas and coastal locations are an attractive location for Holiday Parks given their natural setting and requirement for large sites. There is already a large provision of camping & caravan parks across the Region, However, there is an opportunity for additional quality or branded holiday parks to meet demand for this accommodation type	6	250	1,500	Sunshine Coast Hinterland (1) Sunshine Coast Coastal (2) Noosa Hinterland (1) Gympie Hinterland (1) Gympie Coastal (1)
Hostel/ Backpackers	The Region does not have many high-quality hostel/backpacker facilities, which tend to attract younger and budget travellers. There is opportunity for smaller providers to establish in the Region at key locations to provide niche low-cost accommodation	4	80	320	Sunshine Coast Hinterland (1) Sunshine Coast Coastal (1) Noosa Coastal (1) Gympie Coastal (1)
Standard Motel	More 'mid-scale' facilities are needed across the Region to cater to increasing visitors seeking value for money in the form of quality, yet affordable accommodation.	3	70	210	Sunshine Coast Hinterland (1) Sunshine Coast Coastal (1) Noosa Coastal (1)
Internationally Branded Luxury Hotel/ Resort	High quality and luxury internationally branded hotels have been identified as a gap in the Region. It is envisaged that this facility would attract high-yielding domestic and international visitors	6	250	1,500	Sunshine Coast Hinterland (1) Sunshine Coast Coastal (3) Noosa Coastal (2)
Serviced Holiday Apartments	There is already a high volume of serviced apartment complexes in the Region. However, there is a need for additional high-quality (and branded) facilities to meet growing demand for key markets, including the family & VFR markets.	7	80	560	Sunshine Coast Coastal (4) Noosa Coastal (2) Gympie Hinterland (1)
Nature Based Themed Boutique Resort	Given the nature-based strengths of the Region, particularly within the hinterland, there is opportunity to provide quality and boutique nature-based accommodation	6	80	480	Sunshine Coast Hinterland (3) Noosa Hinterland (2) Gympie Coastal (1)
Super Luxury Lodge & Wellness Retreat	A luxury boutique resort, with integrated facilities such as a restaurant, recreation, and spa and wellness, etc. would attract high-yielding travellers (both domestic and international). The focus on health & wellbeing is well matched with the eco-tourism and sustainable tourism objectives of the Region (and can leverage the nature-based assets)	6	30	180	Noosa Hinterland (2) Noosa Coastal (2) Sunshine Coast Hinterland (2)
Total		38		4,750	



KEY VISITOR MARKETS

OVERVIEW

This section provides an assessment of the key visitor markets for the Sunshine Coast region. The descriptions of the market segments are based on information sourced from TEQ, which, as the organisation responsible for destination development across Queensland, determines the state-wide target markets for each RTO (including VSC).

Understanding these target markets (including market size, characteristics, preferences, etc) is also critical to identifying future strategic marketing initiatives, as well as product and infrastructure requirements to attract these visitor segments.

DOMESTIC HIGH VALUE TRAVELLERS

HVT are defined by the following characteristics:

- Engage in leisure travel (e.g. holiday purposes or VFR);
- Spend more than the average visitor (over $2,000 per trip, or $300 per night for shorter trips); and
- Are attracted to the Region's product and experience strengths.[7]

According to TEQ, HVT represents approximately 1.1 million Queenslanders (intrastate visitors) and approximately 4.2 million other Australians (interstate visitors) Therefore, there are a total of over 5.3 million domestic visitors that are classified as HVT.

Classifying HVT as a target market is designed to generate increases in visitor value (rather than focusing solely on volume). Sunshine Coast has the potential to become a high-value destination by attracting high value visitor segments. The DTP, therefore, will focus on relevant marketing and product opportunities to attract these market segments.
The HVT market is categorised into three domestic visitor segments, including intrastate and interstate visitors, which is summarised in Table T15.

[7] TEQ, Domestic High Value Traveller Profiles, 2018

T15. DOMESTIC HIGH VALUE TRAVELLER VISITOR SEGMENTATION

Source: TEQ, Domestic High Value Traveller Profiles, 2018

TRAVELLING WITH CHILDREN

	INTRASTATE	INTERSTATE
Estimated Market Size	288,000	1,400,000
Origin	50% Brisbane 50% Other QLD	33% Sydney 24% Melbourne
Key Characteristics	Lower income Prefer local holidays	Affluent families Time poor (work and social life)
Holiday Preferences (ranked)	Value for money Family destination Coastal/beach	Family destination Value for money Coastal/beach
Holiday Types (ranked)	Short break Beach holiday Resort holiday	Short break Beach holiday Resort holiday

TRAVELLING WITHOUT CHILDREN (18-49)

	INTRASTATE	INTERSTATE
Estimated Market Size	408,000	1,300,000
Origin	49% Brisbane 51% Other QLD	34% Sydney 27% Melbourne
Key Characteristics	White collar professionals Focus on health & entertainment	White collar professionals Propensity to spend more
Holiday Preferences (ranked)	Value for money Coastal/beach Adventure	Value for money Food & Wine Unique experiences
Holiday Types (ranked)	Short break Beach holiday Discovery	Short break City break Discovery

TRAVELLING WITHOUT CHILDREN (50+)

	INTRASTATE	INTERSTATE
Estimated Market Size	440,000	1,500,000
Origin	45% Brisbane 55% Other QLD	27% Melbourne 22% Sydney
Key Characteristics	Retirees/part-time workers Lead a more relaxed lifestyle	Retirees/part-time workers Spare time for leisure activities
Holiday Preferences (ranked)	Value for money Food & Wine Coastal/beach	Value for money Food & Wine History & Heritage
Holiday Types (ranked)	Short break Dispersal to multiple locations Discovery	Dispersal Short break Discovery

INTERNATIONAL KEY MARKETS

Only 9% of total international visitors originate from the Asian market (9% of total), which is significantly less than other Queensland destinations such as the Gold Coast (55%) and Tropical North Queensland (46%). This is, therefore, a clear opportunity to increase international penetration from the large pool of Asian visitors to the state.

INTERNATIONAL EXPERIENCE SEEKERS

In international markets, TEQ currently targets Experience Seekers. The international experience seeker/self-drive market is identified as a key market by Tourism Australia. Experience seekers are not characterised by nationality but seek out authentic experiences which are engaging and have an educational element.

This market exhibits the following characteristics and holiday preferences:

- Affluent and well-educated professionals;
- Tends to spend more than the average international visitor;
- Seeks authentic local experiences and social interactions;
- Wants to participate in and learn about different lifestyles and cultures; and
- Visits authentic and unique destinations.[8]

As such, international experience seekers are more likely to visit regional areas, stay longer in the Region, and are less attracted to 'mass packaged tourism products'.

At present, international experience seekers do not make up a large portion of visitation to the Region, however, there is an opportunity to grow this market with appropriate nature-based experiences and development of supporting products and services.

ASIAN VISITOR MARKETS

The Asian free independent travellers market should also be considered as a long-term emerging market for the Sunshine Coast for several reasons, including:

- Asia is expected to continue to outperform other overseas markets. At the national level, the latest visitor projections are for inbound Asian markets to grow by 17.4% over the next two years alone and contribute to 64% of all international visitor growth.[9]
- Asian markets are attracted to the Region through specific products and experiences that align with consumer preferences and drive destination choice. This includes more luxury/branded hotel accommodation, high-quality food & wine, retail product, etc.
- The growth of the Asian market is expected to be driven by the airport expansion, which will enable regular direct short-haul international flights to Asia.

Each Asian market is unique in terms of preferences and destination choice. Therefore, it is crucial that the Sunshine Coast understands the specific preferences and drivers of each and facilitates growth by ensuring that:

- **It is strategically positioned to attract identified target markets; and**
- **The industry is 'visitor ready' for these markets (through specific products, experiences and enhanced cultural awareness).**

[8] Tourism Australia, Australian Experiences Industry Toolkit,
[9] Tourism Research Australia, Tourism Forecasts August 2017

COMPETITIVE ADVANTAGES

INTRODUCTION

Drawing on the research and analysis undertaken in Part A, the following details the competitive advantages of the Region. This demonstrates the attributes that makes the Sunshine Coast a desirable (and competitive) visitor destination and help articulate the Region's selling point to target markets.

The driver of the Region's competitive advantages is the result of the Region having a combination of natural amenity (e.g. beaches and hinterland) and a significant population base (over 400,000 residents). Visitors can, therefore, experience the natural environmental features of the Region with all of the benefits of a large urban centre, including:

- Density of product in multiple urban centres scattered across the Region;
- A large and capable workforce that can service the tourism industry;
- Authentic local experiences, as residents live in the area; and
- Quality services and access to infrastructure.

SUNSHINE COAST COMPETITIVE ADVANTAGES

When discussing the competitive advantages of the Sunshine Coast, it is not one single (or unique) product strength; but rather a collection of characteristics that make it a highly desirable destination. The following summarises the Region's advantages.

ACCESSIBILITY & CONNECTIVITY

The Region is accessible and well-connected through road and rail infrastructure. The Sunshine Coast Airport provides access to the (predominantly overnight) domestic and international market, while the road network (i.e. Bruce Highway) connects the destination to South-East Queensland population centres (inc. Brisbane, Gold Coast, etc). In addition, there are high levels of accessibility and connectivity within the Region in a number of way, including:

- Good highway access from the airport to major tourist/ accommodation centres along the coast, providing efficient access to Noosa to the north and Sunshine Coast beaches to the south;
- Connectivity along the cost via north-south arterials and highways, including the Sunshine Motorway and David Low Way; and
- East-west access between the coast and hinterland via several highways (inc. Tin Can Bay Road in Gympie, Eumundi-Noosa Road and Maroochydore Road).

TOURISM HUBS

Although the Region is large and diverse, it comprises a range of smaller destinations that serve as standalone tourism hubs consisting clusters of accommodation, hospitality services (e.g. food & beverage), nature-based product (e.g. beaches, national parks, etc.), tour operators, retail strips, shopping centres, etc.

This is advantageous to the Region as the tourism hubs are compact, accessible, and cater to visitor needs. It usually consists of 1-2 main roads that are walkable and include an agglomeration of visitor product, experiences and accommodation. These hubs are located along the coast (e.g. Caloundra, Mooloolaba, Maroochydore, Noosa, etc.) as well as the hinterland (e.g. Eumundi, Maleny, Montville, Pomona, etc.).

The presence of these standalone destinations are a strength for the Region as each one is unique and caters to a variety of target markets depending on its location, the range of available product and accommodation. The challenge for the Region is to leverage the use of these hubs as a visitor base and encourage dispersal across the Region (e.g. internal daytrips).

PRODUCT RICH

The Sunshine Coast is a product rich region that provides a wide range of high-quality products and experiences. As demonstrated by the product audit, there exists a variety of product across each sub-region as well as in the coastal and hinterland areas, including:

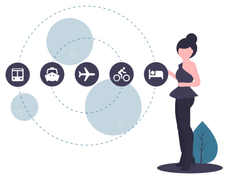
- Nature-based & outdoor assets;
- Arts & culture experiences;
- Health & wellbeing facilities;
- Retail and food & beverage;
- Sport & recreation activities; and
- A diverse events calendar.

Although not each product category is recognised as a primary strength, it is sufficient enough to attract several visitor demographics, ranging from families, adult couples and the elderly and generate visitor yield.

In addition, despite some limitations, the general quality of visitor accommodation is high. Over 60% of accommodation establishments are 'Upper Mid Class' or above and typically cater to visitor needs in terms of accommodation facilities and services provided.

NATURE-BASED ASSETS

The Region's natural assets are a primary strength for the Region and driver of destination choice, typified by the high-quality coastline, beaches, national parks and landscapes, etc. This provides diverse and high-quality natural amenity for visitors. This is important to improving the overall visitor experience as it makes for a more enjoyable, comfortable and attractive visit. This is a key advantage for the Region and drives destination choice, particularly for the holiday and leisure market.



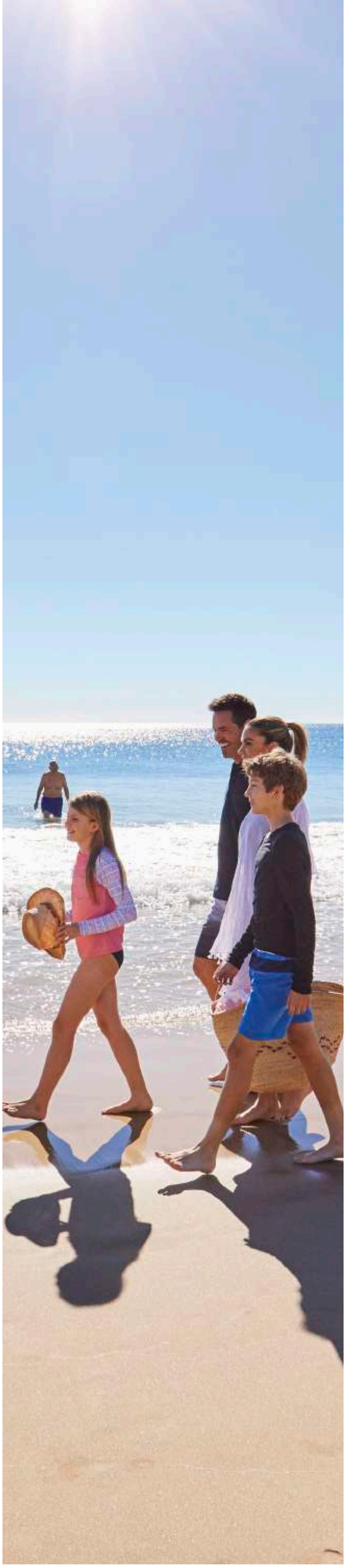
TOURISM SERVICES

The Region's population base and urban environment (particularly along the coast) provides a supporting framework for the tourism industry, including:

- Housing;
- A large resident workforce;
- Hospitality services; and
- A supply-chain for local businesses.

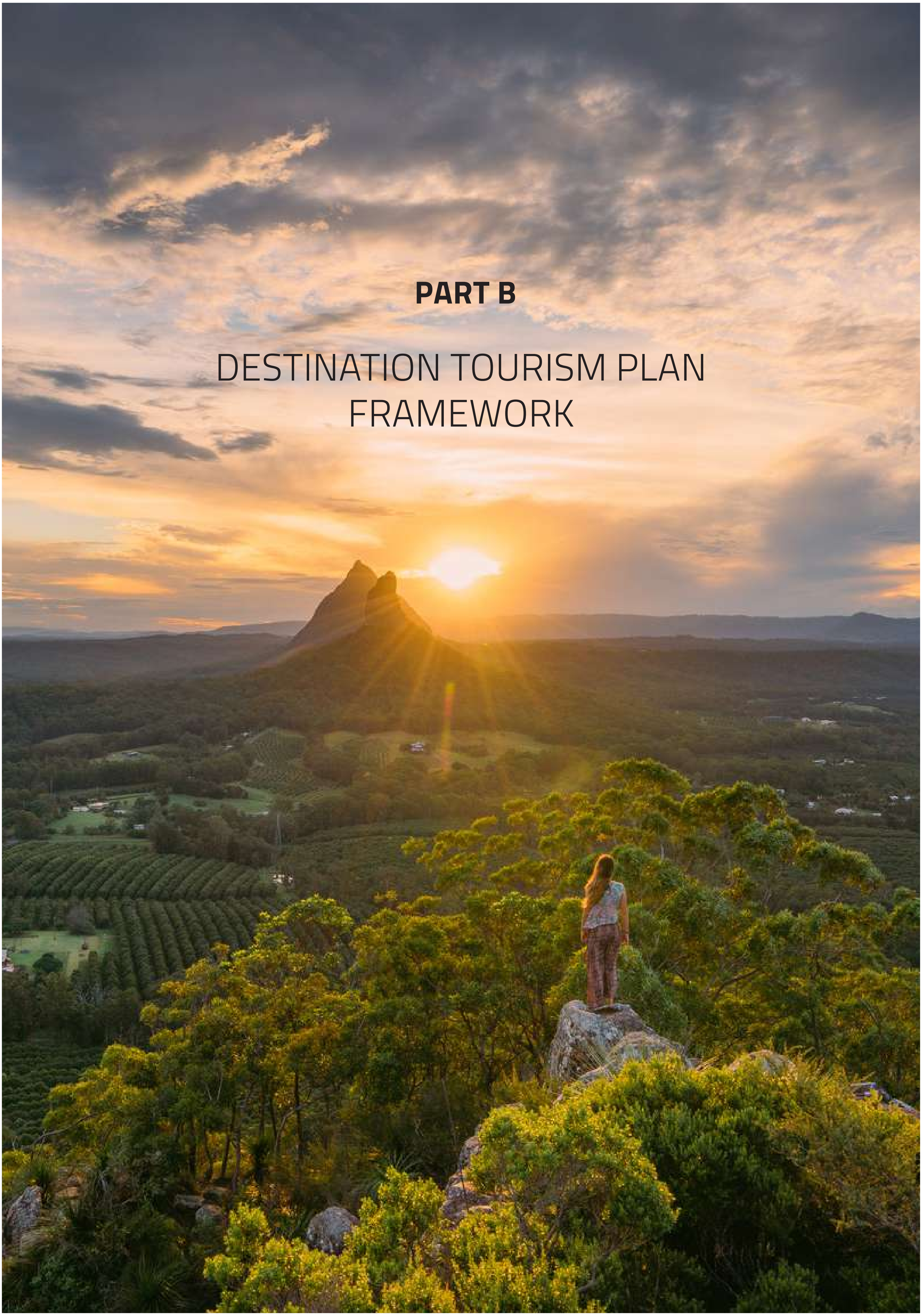
This framework ensures the provision of high-quality tourism services (and product) that attracts visitation and caters to visitor needs.

The urban environment also supports both a hospital precinct (Sunshine Coast University Hospital) and education precinct (University of the Sunshine Coast) in the Sunshine Coast LGA. These areas can drive alternative sources of visitor growth, primarily through health and education tourism.



PART B

DESTINATION TOURISM PLAN FRAMEWORK



STRATEGIC CONSIDERATIONS

OVERVIEW

The below outlines the key considerations and issues for the development of the Sunshine Coast DTP. This helps to inform the framework and identify strategic themes and future directions, including marketing and product development opportunities, to sustainably grow the tourism industry.

LEVERAGING SUNSHINE COAST'S STRATEGIC LOCATION

Sunshine Coast's proximity to Brisbane is a key consideration for tourism projects and opportunities. Brisbane provides a key domestic market and has a major international airport capable of drawing visitors from across the globe.

ACCOMMODATING FOR GROWTH IN TOURISM

Visitor capacity has become a major constraint to growth for the Sunshine Coast. The Region has experienced substantial growth over the past 10 years, however, there has been little investment in accommodation in the Region to accommodate future growth.

THE SUNSHINE COAST AIRPORT EXPANSION PROJECT

This project is a critical piece of infrastructure that will facilitate tourism growth as It will enable a greater volume of visitors to access the Region and will result in substantial increases in both interstate and international markets (existing and emerging).

VISITOR VALUE OVER VOLUME

The Region already receives a high volume of visitation. Therefore, to drive growth in the tourism industry without compromising capacity, the Region should focus on the value of the visitor economy via increases in visitor expenditure.

REGIONAL APPROACH AND COLLABORATION

The current approach to tourism governance is fragmented due to the number of local and regional tourism organisations. Therefore, there should be greater collaboration between the regional Visit Sunshine Coast tourism organisation and the sub-regions.

IMPORTANCE OF TOURISM SUSTAINABILITY

Sustainable tourism practices (e.g. considering tourism's impact on the local environment, culture and community) helps create authentic experiences whilst adhering to the Region's environmental and cultural values. These practices are important as they help to facilitate long-term tourism growth and ensure the Region continues to be a compelling and attractive destination.

ACTIVATING THE HINTERLAND

Hinterland activation is important for the long-term growth of the visitor economy, as it has the potential to provide a unique visitor experience that is differentiated from the coastal experience.

DEVELOPMENT OF ECO-TOURISM

The region's nature-based assets should drive product and infrastructure development in ways that leverage the natural surrounds and fosters greater environmental understanding, appreciation and conservation.

ENCOURAGING VISITOR DISPERSAL

Encouraging greater visitor dispersal to other parts of the Region (i.e. the hinterland), or across multiple sub-regions will help alleviate capacity issues and spread the benefits of tourism across the Region.

DEVELOPING ARTS & CULTURE EXPERIENCES

Development of arts & culture product (and Indigenous experiences) has the potential to attract niche, high-yielding visitor markets that are seeking authentic and immersive experiences.

FOOD & BEVERAGE INVESTMENT

Food & beverage experiences are key drivers of destination choice amongst many visitors. This is a niche market that seeks unique and authentic food-related experiences that are not experienced at home, with a focus on local and boutique product.

LEVERAGING EVENTS

Events and festivals can be developed further, through adopting a more strategic events calendar and developing the necessary supporting infrastructure/facilities. This can help strengthen both holiday/leisure events as well as business events.

STRATEGIC MARKETING & REGIONAL POSITIONING

A key driver for tourism growth is by leveraging the competitive advantages of the Region and strategically positioning regional product/experiences to high-yield target markets.

INDUSTRY DEVELOPMENT

Promote and support industry development to increase the capabilities of the tourism industry and better meet the needs and expectations of visitors. In doing so, the industry can help enhance the visitor experience and facilitate tourism growth.

INCREASING OPERATING BUDGET

The capacity of the VSC to facilitate growth in tourism is constrained due to budgetary limitations. Therefore, there is a need for VSC to seek additional funding through existing or alternative sources, which is critical to support the organisation to deliver competitive marketing, product and industry initiatives.

STRATEGIC FRAMEWORK OVERVIEW

INTRODUCTION

The DTP framework provides the overarching approach to strategic tourism development in the Sunshine Coast (Figure F*). The framework is based on background research, consultation and key considerations for the region, which supports the identification of strategic themes, objectives and future projects.

- Four **tourism-specific themes** that can directly influence the visitor economy and deliver/ enhance the Region's competitive advantages;
- Three **tourism-enabling themes**, which can indirectly influence the visitor economy through major infrastructure developments and/ or economic development activities;
- The identification of deliverable **priority projects** for the Region that is designed to stimulate significant regional growth in the visitor economy; and
- The identification of a suite of **potential opportunities** that will support growth in tourism at both a sub-regional and regional level.

These future directions and identified projects are designed to address the gaps and opportunities for the tourism industry and include a combination of industry development, marketing and product development initiatives.

DEVELOPMENT THEMES

The following page outlines the key strategic development themes that have been identified for the Sunshine Coast region. This has been categorised into Tourism-Specific Themes and Tourism-Enabling Themes, each of which is aligned to an overarching objective that will help with the identification of specific projects and strategies designed to grow the tourism industry.

These themes are are defined as follows:

- The **tourism-specific** themes can directly influence the visitor economy and develop/enhance the Region's competitive advantages.
- The **tourism-enabling** themes can indirectly influence the visitor economy through major infrastructure developments and/or economic development activities.

F8. DTP FRAMEWORK

TOURISM SPECIFIC THEMES

NO.	THEME	OBJECTIVE	PROJECT FOCUS
1	Strategic Marketing	Strategically position the Region by promoting the competitive advantages to identified target markets.	Projects will include marketing programs and initiatives that VSC can deliver in the short-term and beyond.
2	Market Ready	Ensuring the tourism industry can support and facilitate visitor growth in identified target markets.	VSC can help ensure the Region is 'visitor-ready' for emerging high-yielding visitor markets (domestic and international) by: supporting an improvement in the quality of industry services; and assisting industry skills and understanding of the market
3	Regional Collaboration	Strengthen the Region by identifying targeted linkages and opportunities (through a coordinated approach) to drive tourism development and increase visitor yield.	Initiatives can be delivered by VSC, or supported in partnership with industry and government, to ensure the Region is working collaboratively to achieve a unified outcome for the visitor economy
4	Leveraging Product Strengths	Ensure that the Region's tourism assets are fully utilised and optimised to attract target markets and generate increases in visitation and visitor yield.	VSC can support and advocate for development of product & experiences to address gaps and enhance the Region's current/emerging strengths. Projects will include marketing programs and initiatives that VSC can deliver in the short-term and beyond.

TOURISM ENABLING THEMES

NO.	THEME	OBJECTIVE	PROJECT FOCUS
5	Major Infrastructure Development	Develop major public sector infrastructure projects to support economic growth within the key urban centres and accommodate projected increases in visitation.	VSC can advocate and support for government-led economic development projects that may indirectly benefit tourism.
6	Accommodation	Improve and diversify the accommodation offer in the Region matched to contemporary market demands and future visitation needs	VSC can support government in preparing an investment prospectus for the private sector and advocate for accommodation investment where there is a market need
7	Experience & Product Development	Improve and develop the Region's tourism attractions to enhance the visitor experience, support growth in visitation and increase yield.	VSC to advocate for, and publicly support, private sector projects that can indirectly benefit the tourism industry.

FUTURE DIRECTIONS

PROJECT ASSESMENT CRITERIA

The projects identified in this plan have been prioritised using an agreed assessment methodology. A set of eight assessment criteria were developed in order to prioritise projects.

Each project was scored between 1 and 5 for each of the criteria (1 = lowest; 5 = highest), and the overall score determining the ranking in the tier system. The assessments were qualitative and subjective; based on local knowledge, stakeholder consultation, professional experience, and a general assessment of perceived benefits.

The following criteria were developed in order to prioritise projects:

1. **Deliverability**. Projects that Visit Sunshine Coast can directly implement, deliver and or influence (via partnerships with industry and government).
2. **Impact on Competitive Advantages**. Projects that will support, develop or enhance the Region's competitive advantages (i.e. accessibility, highly developed tourism hubs, product quality, attractive natural assets, tourism services)
3. **Alignment to High-Value Target Markets**. Projects that positively influence the perception of Sunshine Coast as a desirable visitor destination for high-value target markets.
4. **Visitor Market Value**. Projects that increase the value of the visitor market by attracting visitors to the Region, increasing the number of visitor nights and, particularly, increasing visitor yield
5. **Increases visitation capacity.** Projects that can help accommodate for forecasted growth in overnight visitors and alleviate capacity issues.
6. **Sustainability**. Projects that have a high probability of implementation and sustainability over the long term, with consideration to environmental, economic and social factors.
7. **Dispersal**. The capacity for a project to draw a significant amount of visitation to multiple sub-regions and hinterland areas.
8. **Regional Positioning.** Projects that adopt a regional approach and align with regional strengths and linkages.

PROJECT TARGETS

The priority projects are supported by a range of aspirational and realistic targets aimed at growing the tourism industry over the lifespan of this report (2020-2025) and beyond. These targets, outlined below, are drawn from the objectives of the DTP as well as the strategic considerations. Importantly, they help to quantify the impacts of the priority projects on the visitor economy in order to measure and examine its relative success.

Visitation[10]

- Increase domestic overnight visitors from 4m in 2019 to 5m in 2025
- Increase international visitors from 322k in 2019 to 465k in 2025
- Increase visitor dispersal to the hinterland from 30% of total visits to 40%

Market Segment Growth[11]

- Increase in event visitors from 446k in 2019 to 574k in 2025
- Increase in Arts & Cultural tourism (inc. Indigenous tourism) from 1m in 2019 to 1.3m in 2025
- Increase in Nature-Based & Outdoor tourism from 8.7m in 2019 to 11.3m in 2025

Yield

- Increase in visitor yield (average visitor expenditure per day/night) by 15% from $138 to $160
- Increase proportion of visitor expenditure in the hinterland from 22% of total to 30% of total

Visitor Experience

- Increase visitor satisfaction (based on introduction of annual visitor satisfaction research to be undertaken, with benchmarks to be established)

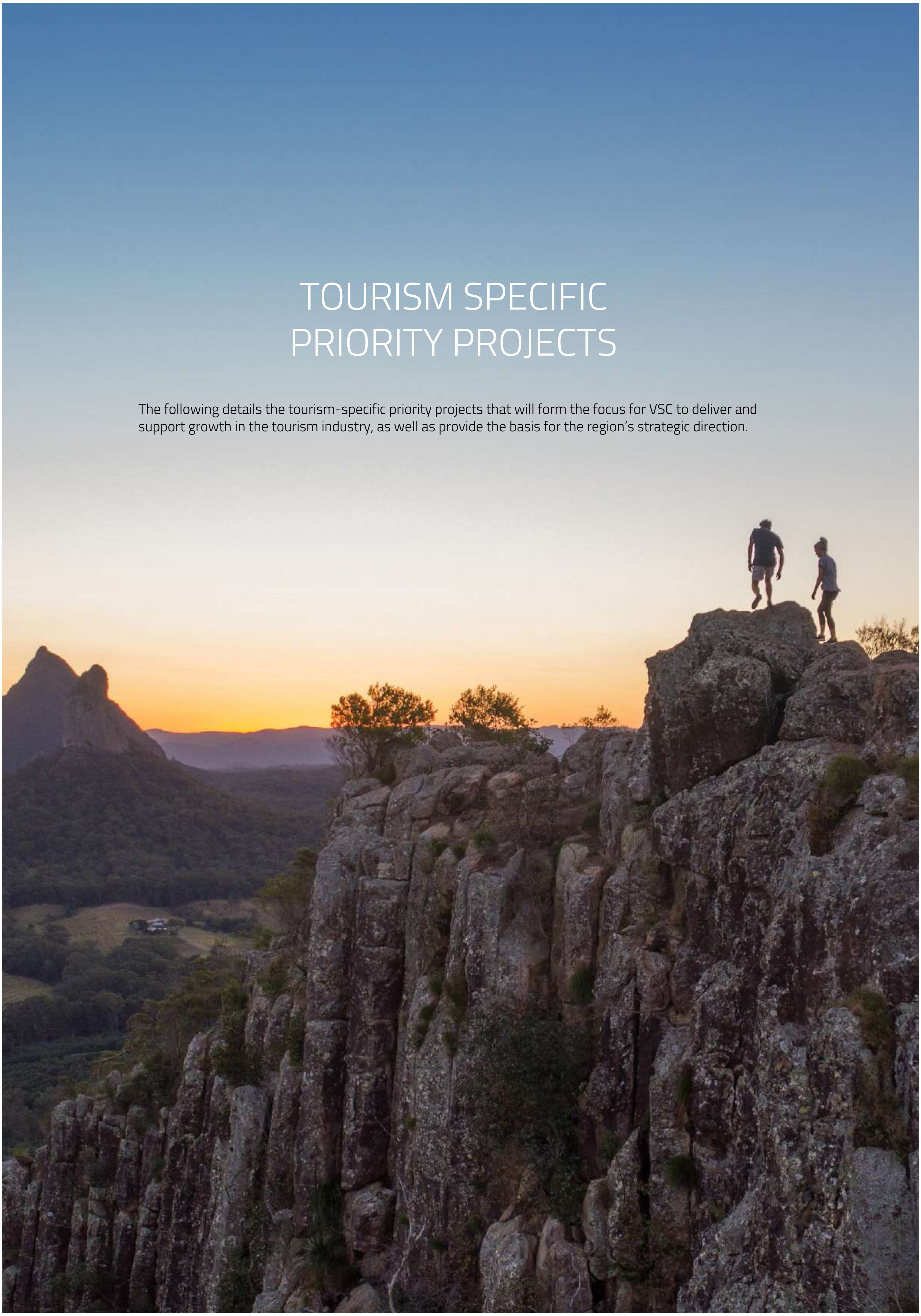
PROJECT PRIORITASATION

The following projects included in this report are categorised as 'priority projects' based on the above assessment criteria.

[10 & 11] Targets are based on existing visitor projections

TOURISM SPECIFIC PRIORITY PROJECTS

The following details the tourism-specific priority projects that will form the focus for VSC to deliver and support growth in the tourism industry, as well as provide the basis for the region's strategic direction.



THEME 1

Srategic Marketing

OBJECTIVE

Strategically position the Region by promoting the competitive advantages to identified target markets

This theme includes marketing programs and initiatives that VSC can deliver in the short-term and beyond.

TARGET 2025

- Increase domestic overnight visitors from 4m in 2019 to 5m in 2025 (based on existing visitor projections)
- Increase international visitors from 322k in 2019 to 465k in 2025 (based on existing visitor projections)
- Increase visitor dispersal to the hinterland from 30% of total visits to 40%
- Increase in visitor yield (average visitor expenditure per day/night) by 15% from $138 to $160
- Increase proportion of visitor expenditure in the hinterland from 22% of total to 30% of total

PROJECT 1

Regional Marketing Research & Strategy

OVERVIEW

This initiative includes the development of a unified marketing Strategy. The Strategy should strategically position the Region – and sub-regions – to capture desired markets and specific segments/countries within these markets that would be attracted to the Region's product strengths. Within this strategy, a range of objectives and actions should be developed to cater to both domestic and international target markets, based on differences in visitor needs and preferences.

Importantly, a strategic marketing document should attract target markets by differentiating the Region from comparable destinations along the coast and highlighting the competitive advantages and diversity in product/experiences in the sub-regions. More specifically, the marketing campaigns/strategies needs to highlight the product beyond the iconic coastline and beaches.

Focusing on activities and experiences is critical to attracting international experience seekers and high value tourists.

KEY STAKEHOLDERS

- **Visit Sunshine Coast (lead)**
- Industry Members

DELIVERY TIMEFRAME

Short-term (0-1 years)

DELIVERY ACTIONS

1. VSC to seek additional government funding to provide sufficient resources to develop a strategy.
2. Establish a marketing reference group that includes representatives from across the Region, Visit Sunshine Coast staff, industry and selected board members.
3. Undertake market research to confirm target markets, including testing of awareness, perceptions and motivation to visit. This should include domestic and international target markets and include both quantitative and qualitative research.
4. Reference group to agree on target markets, based on above market research.
5. Ongoing engagement with Local Tourism Associations, industry and Councils across sub-regions to establish a coordinated and unified approach to regional marketing.

6. Investigate options to expand marketing budget based on target market research including both public and private sector buy in opportunities.
7. Establish a project brief and tender out the preparation of a marketing strategy based on agreed approach, target markets and principles.
8. Prepare marketing strategy with a clear action plan, responsibilities and costs.

OUTCOMES

- Promoting the Region's competitive advantages.
- Detailed understanding of target markets, specific to Sunshine Coast Region.
- Detailed marketing strategy and action plan.
- Greater levels of support and cooperative buy in for marketing programs.

PROJECT 2

Reinforcement of the Sunshine Coast Brand

OVERVIEW

Currently, the Sunshine Coast regional branding is fragmented and inconsistent. Consumers are unaware that the Region also includes Noosa and Gympie, as the 'Sunshine Coast' label and its Naturally Refreshing brand is not consistent with the local tourism branding.

Therefore, the VSC should focus on developing a unified brand and position that consolidates the various sub-regional brands and promotes a singular/uniform 'Sunshine Coast' brand that is adopted across the Region that caters to target markets.

KEY STAKEHOLDERS

- **Visit Sunshine Coast (lead)**
- Tourism Noosa
- Destination Gympie

DELIVERY TIMEFRAME

Short-term (0-1 years)

DELIVERY ACTIONS

1. VSC to utilise the marketing reference group as a sounding board for refining and reinforcing the Sunshine Coast Brand.
2. Building on previous brand pillars work and market research undertaken for Project 1, establish a brand strategy (to be prepared using additional funding sought from government sources).
3. Utilise the branding framework to promote a single Sunshine Coast brand that applies to each sub-region and all target markets (domestic and international).
4. Continue to implement brand strengthening and awareness of Sunshine Coast where possible (as identified in the brand strategy);
5. Roll out brand strategy across the Region

OUTCOMES

- Establishment of a unified brand and positioning for the Region.
- Delivery of a brand and positioning strategy and focuses on the Region's competitive advantages.
- Industry and stakeholder awareness and utilisation of brand.

THEME 2

Market Ready

OBJECTIVE

Ensuring the tourism industry can support and facilitate visitor growth in identified target markets

This includes priority projects and that be implemented by VSC to help ensure the Region is 'visitor-ready' for emerging and high-yielding target markets (domestic and international).

TARGET 2025

- Increase domestic overnight visitors from 4m in 2019 to 5m in 2025 (based on existing visitor projections)
- Increase international visitors from 322k in 2019 to 465k in 2025 (based on existing visitor projections)
- Increase in visitor yield (average visitor expenditure per day/night) by 15% from $138 to $160
- Increase visitor satisfaction (based on introduction of annual visitor satisfaction research to be undertaken, with benchmarks to be established).

PROJECT 3

Hospitality & Tourism Industry Development

OVERVIEW

This initiative is designed to increase the capacity of the tourism industry, including relevant hospitality businesses and employees, to:

- Improve the industry's understanding of the importance of the visitor economy;
- Enhance the understanding of target markets;
- Improve digital skills of industry; and
- Develop customer service to better cater to market needs; and

To do so, VSC's role is to provide education and development opportunities for the industry so it is across recent tourism trends, consumer preferences and has the capability to support visitor growth in identified target markets.

KEY STAKEHOLDERS

- **Visit Sunshine Coast (lead)**
- LTO's
- Industry Members

DELIVERY TIMEFRAME

Short-term (0-1 years)

DELIVERY ACTIONS

1. VSC to seek additional funding from government and industry sources to help deliver regular forums and educational workshops (in-region) for tourism industry members, focusing on the issues and opportunities for the industry to drive growth in the visitor economy. This could be developed in conjunction with Local Tourism Organisations (and industry).
2. Promoting external tourism conferences, trade shows, meetings to relevant businesses and employees. This could include events in Australia and overseas.
3. VSC to monitor workforce and industry trends and provide information to industry members where relevant.

OUTCOMES

- Improved understanding of target market preferences and needs.
- Improves the quality of the visitor experience and level of hospitality services, which will enhance the 'Product Rich' competitive advantage.

PROJECT 4

Increase Cultural Support for International Markets

OVERVIEW

The purpose of this initiative is to facilitate growth in international visitors, particularly emerging market segments, by catering to the diversity in culture and language. This is of increasing importance to the Region, as international visitors have grown to record levels and will likely increase as a result of the airport expansion servicing direct short-haul international flights to Asia.

VSC, in collaboration with TEQ, should consider providing supporting materials and educational tutorials to tourism-related businesses, including tour operators, accommodation providers, etc. This could include translation materials for target markets, as well as providing marketing collateral for specific products/ experiences that drive international visitation.

KEY STAKEHOLDERS

- **Visit Sunshine Coast and TEQ (joint lead)**
- Industry members

DELIVERY TIMEFRAME

Medium Term (2-3 years) and Ongoing

DELIVERY ACTIONS

1. VSC to work with TEQ to develop regional priorities and objectives for the international market, as well as organisational roles/responsibilities and funding arrangements to deliver this project.
2. Engage with tourism operators and businesses to establish gaps in support for international markets.
3. VSC and/or TEQ to develop relevant supporting materials to cater to specific market segments, including translation documents.
4. VSC and/or TEQ to provide tutorials to businesses including 1:1 mentoring to help them be market ready for specific international markets.
5. VSC and/or TEQ to distribute materials to the tourism industry.

OUTCOMES

- Improved cultural understanding by the tourism industry.
- Improves the quality of the visitor experience and level of hospitality services, which will enhance the 'Product Rich' competitive advantage.

PROJECT 5

Refresh Sunshine Coast

OVERVIEW

This is an expansion of the Tourism Noosa Refresh Noosa initiative to enhance the accommodation stock within the Sunshine Coast LGA. As such, this project will support accommodation managers/owners to update, renovate and refresh their properties.

The initiative involves engagement with relevant local Councils and industry (e.g. accommodation providers and businesses) to identify opportunities to stimulate investment in improvements (and consistency) in quality to strengthen the profitability the tourism industry and facilitate sustainable growth by adopting environmentally friendly measures.

KEY STAKEHOLDERS

- **Local Councils & Industry members (Joint lead)**
- Visit Sunshine Coast (advocacy only)

DELIVERY TIMEFRAME

Medium Term (2-3 years)

DELIVERY ACTIONS

1. VSC to coordinate joint Council and industry engagement, using industry knowledge and communicating with members.
2. Tourism Noosa to share with interested local Councils and tourism industry stakeholders information on their program objectives, processes and guidelines.
3. Where possible, all local Councils adopt measures, programs and support for providers to upgrade and refresh accommodation facilities, amenities and services.
4. Engage with relevant stakeholders within the relevant local Councils (accommodation providers, businesses, community members) to achieve buy-in and support.
5. VSC to publicly advocate for the program, through media releases and collaboration with industry members to obtain buy-in.

OUTCOMES

- Enhances and delivers on the Region's 'Tourism Hubs', 'Product Rich' and 'Tourism Services' competitive advantages.
- Enhancement of visitor accommodation infrastructure, amenities and experience.
- Increased volume of stays by high-yielding visitors through provision of improved accommodation stock.

THEME 3

Regional Collaboration

OBJECTIVE

Strengthen the Region by identifying targeted linkages and opportunities (through a coordinated approach) to drive tourism development and increase visitor yield

Regional collaboration projects undertaken by VSC are designed to engage all sub-regions, LTOs and/or industry members to drive tourism development through a coordinated approach.

TARGET 2025

- Increase domestic overnight visitors from 4m in 2019 to 5m in 2025 (based on existing visitor projections)
- Increase international visitors from 322k in 2019 to 465k in 2025 (based on existing visitor projections)
- Increase visitor dispersal to the hinterland from 30% of total visits to 40%
- Increase in event visitors from 446k in 2019 to 574k in 2025 (based on existing visitor projections)
- Increase in visitor yield (average visitor expenditure per day/night) by 15% from $138 to $160
- Increase proportion of visitor expenditure in the hinterland from 22% of total to 30% of total

PROJECT 6

Seek Additional Sources of Funding

OVERVIEW

The budgetary limitations experienced by VSC, relative to comparable RTOs in Queensland and Tourism Noosa LTO, affects the capability of the organisation to managing tourism growth. As such, additional funding is required to support marketing, product and industry development initiatives to grow the visitor economy.

KEY STAKEHOLDERS

- **Visit Sunshine Coast (lead)**
- TEQ
- Local Councils
- LTO's
- Industry Members

DELIVERY TIMEFRAME

Short-term (0-1 years)

DELIVERY ACTIONS

1. VSC to identify areas of funding shortfall.
2. Assess potential funding partners and funding avenues to support its operations.
3. Achieve greater levels of buy in from industry into cooperative marketing campaigns.
4. Advocate for additional funding, alternative funding sources, or new funding models, etc.

OUTCOMES

- An increased budget will improve VSCs ability to drive growth in the tourism industry.
- Funds could be used for competitive marketing activities, increasing the Region's presence in international markets, as well as facilitate product and industry development.
- Will remove obstacles so VSC can promote and support the Region's competitive advantages

PROJECT 7

Continue Partnership between Tourism Governance Bodies

OVERVIEW

To avoid fragmentation, duplication of effort and to generate a consistent approach to tourism governance, existing partnership arrangements and collaboration opportunities between VSC and other organisations (LTOs) should be maintained and reinforced. This would help consolidate a *Team Sunshine Coast* that ensures a regional approach to tourism governance,

KEY STAKEHOLDERS

- **Visit Sunshine Coast (lead)**
- Local Council
- Tourism Noosa
- Destination Gympie
- Other LTO's (e.g. Hinterland Tourism)

DELIVERY TIMEFRAME

Ongoing

DELIVERY ACTIONS

1. VSC to engage with other organisations and continue reinforcement of regional approach to tourism governance.
2. Continue and promote existing partnership agreements.
3. Ensure there is adequate regional representation on projects and marketing initiatives.

OUTCOMES

- Continued collaboration between VSC and other partner organisations that contribute to tourism governance (e.g. coordinated marketing, industry development, etc.).
- A more unified approach to tourism management (e.g. coordinated marketing and industry development initiatives) to facilitate sustainable tourism growth.
- Maintain a more effective and efficient approach to tourism management so VSC can focus on improving and developing the Region's competitive advantages.

PROJECT 8

Continue the Sunshine Coast Aviation Partnership

OVERVIEW

The MoU is an important partnership (between VSC, Tourism Noosa and Sunshine Coast Airport) as it provides a coordinated approach to competitive marketing and seeks to attract high yielding international and domestic overnight markets. However, with the MoU set to expire on 1st September 2020, it is recommended that the partnership agreement continues into the long-term.

The airport will be of increasing importance to the visitor economy going forward, particularly with the expansion project opening new routes to short-haul international destinations and increasing its capacity to receive overnight visitors.

KEY STAKEHOLDERS

- **Visit Sunshine Coast (lead)**
- Tourism Noosa
- Palisades (Sunshine Coast Airport)

DELIVERY TIMEFRAME

Short-term (0-1 years) and Ongoing

DELIVERY ACTIONS

1. VSC to lead the review of the existing MoU within three months of expiry.
2. Engaging with partners to develop a new MoU with shared goals.
3. Confirm funding contributions of each party, as well as additional contributions from government.
4. Approve and endorse a new MoU for 2020 and beyond.

OUTCOMES

- Enhance the Region's 'Accessibility' as a competitive advantage.
- Increase awareness of, and visitation to, the Sunshine Coast (via the airport).
- Increase volume to direct flights to Sunshine Coast.
- Increase (domestic and international) overnight visitation and increase visitor yield in the Region.

THEME 4

Leveraging Product Strengths

OBJECTIVE

Ensure that the Region's tourism assets are fully utilised and optimised to attract target markets and generate increases in visitation and visitor yield

The following projects and initiatives are designed to enhance the Region's competitive strengths and facilitate development opportunities for tourism-based infrastructure, product experiences to attract identified target markets.

TARGET 2025

- Increase in Arts & Cultural tourism (inc. Indigenous tourism) from 1m in 2019 to 1.3m in 2025 (based on existing visitor projections)
- Increase in Nature-based & Outdoor tourism from 8.7m in 2019 to 11.3m in 2025 (based on existing visitor projections)
- Increase in visitor yield (average visitor expenditure per day/night) by 15% from $138 to $160
- Increase proportion of visitor expenditure in the hinterland from 22% of total to 30% of total

PROJECT 9

Cycle and Trail Tourism Strategy

OVERVIEW

This strategy, to be coordinated by VSC and supported by Local Councils, will propose tactics to leverage and promote existing and new walking and cycling trails across the Sunshine Coast Tourism Region. The approach will set out potential opportunities better utilise the Region's natural assets, grow nature-based tourism and provide more opportunities to attract visitor yield.

KEY STAKEHOLDERS

- **Visit Sunshine Coast (lead)**
- Local Councils
- State Government

DELIVERY TIMEFRAME

Medium Term (2-3 years)

DELIVERY ACTIONS

1. VSC to collaborate and establish a cycle and trail reference group including local industry, local walking and cycle clubs, Local Government representatives and VSC.
2. Reference group to seek funding partners and identify competitive sources of funding to support development of the strategy.
3. Establish project parameters and seek assistance from an appropriate expert in the field.
4. Develop/implement the cycle and trail strategy which includes consideration of:
   a. Existing trails across the Region.
   b. Key assets across walking, mountain biking, road cycling, recreational cycling.
   c. Identify strategic gaps in the network and feed these into the relevant Council processes;
   d. Identify ways to better service the walking and cycling sector such as bike hubs, trail head facilities, nature-based accommodation;
   e. Identify infrastructure needs;
   f. Identify target markets and marketing considerations; and
   g. Identify ways to grow the awareness of trail and cycle tourism in the Sunshine Coast.
5. VSC to provide support for reference group, as required.

OUTCOMES

- A coordinated cycle and walking network that does not end at Council boundaries.
- Growth in cycle and trail tourism leveraging existing assets in the short term.
- Long term investment in strategic cycle and trail infrastructure.
- Enhance and develop the Region's 'Tourism Hubs', 'Product Rich' and 'Natural Amenity' competitive advantages.

PROJECT 10

Indigenous Cultural Tourism Strategy

OVERVIEW

Indigenous Tourism is an emerging product in the Region and there is a growing interest in cultivating Indigenous cultural tourism. However, the current offering is recognised as being underdeveloped for target markets (particularly the international market). This strategy is, therefore, designed to provide strategic direction to develop and activate Indigenous product and showcase the Region's Indigenous history and heritage. Indigenous tourism would greatly appeal to potential growth area markets including high value travellers and international experience seekers.

KEY STAKEHOLDERS

- **Traditional Owner Groups (lead)**
- Visit Sunshine Coast
- Local Councils
- State Government

DELIVERY TIMEFRAME

Long Term (4-5 years)

DELIVERY ACTIONS

1. Traditional Owners to work with key stakeholders, particularly to understand the gaps and opportunities in Indigenous cultural product.
2. Identify strategies and practical approaches to improve the range and quality of Indigenous experiences. This can be based on best practice case studies and aligned with market expectations.
3. Seek funding from government sources to support development and implementation of the strategy.
4. VSC to provide support to Traditional Owners through communication with industry and advocate for funding, where required.

OUTCOMES

- Growth in indigenous tour operators.
- Increased understanding of the Indigenous cultural values and heritage of the Region.
- Enhance and develop the Region's 'Tourism Hubs', 'Product Rich' and 'Natural Amenity' competitive advantages.

PROJECT 11

Promoting Accommodation Investment

OVERVIEW

As discussed earlier in this report, additional accommodation facilities will be required over the next 10 years to support projected demand in commercial accommodation. The report identified the need for 38 additional establishments and the typologies required to meet this demand (providing an outline of scale and investment required by the private sector). To attract interest in accommodation investment from the private sector, VSC should assist Local Councils to develop and promote an accommodation prospectus.

KEY STAKEHOLDERS

- **Local Councils (lead)**
- Visit Sunshine Coast
- Private Sector/ Accommodation Sector

DELIVERY TIMEFRAME

Medium Term (2-3 years)

DELIVERY ACTIONS

1. Local Councils, with assistance from VSC, to confirm the typologies and proposed location of additional accommodation.
2. Local Councils to obtain support for development opportunities.
3. Publish and promote prospectus materials to potential private sector investors to facilitate accommodation investment in the Region. VSC to leverage its membership database to facilitate distribution of materials.

OUTCOMES

- Improvements to the quality and diversity of accommodation stock (particularly luxury-class establishments).
- Increased overnight visitation and visitor yield.
- Enhance the Region's 'Tourism Hubs', 'Product Rich' and 'Tourism Services' competitive advantages.

PROJECT 12

Eco Tourism Enhancement and Awareness

OVERVIEW

Eco-tourism is an important component of the Sunshine Coast visitor economy, as it aligns with the Region's nature-based assets and supporting environmental and cultural understanding. The ecotourism strengths of the Sunshine Coast however have low awareness and collaboration between the industry is limited. There is opportunity to enhance awareness and collaboration in the industry, with support from Visit Sunshine Coast, to facilitate growth in this sector.

KEY STAKEHOLDERS

- **Local Councils (lead)**
- Visit Sunshine Coast
- Eco-tourism Operators
- Tourism Noosa
- Destination Gympie

DELIVERY TIMEFRAME

Medium Term (2-3 years)

DELIVERY ACTIONS

1. VSC to collaborate with Local Councils and undertake a forum with eco-tourism operators across the Region to discuss ways to improve collaboration and industry awareness and growth.
2. VSC to provide support in terms of coordinating council collaboration, as well as facilitating industry engagement and communication.
3. VSC to support industry to prepare an action plan for the eco-tourism industry which should consider ways to increase awareness and profile of the sector.
4. Consider use of VSC resources and knowledge to support eco-tourism growth.

OUTCOMES

- Increased awareness and profile of the sector
- Improving nature-based tourism and enhancing the Region's 'Product Rich' and 'Natural Amenity' competitive advantages.

PROJECT 13

Facilitate Collaboration between Visitor Attractions

OVERVIEW

To help attract more visitors to the major attractions in the Region, VSC can help facilitate more collaboration and partnerships between the operators of visitor attractions – including major and minor attractions.

This could include (for example) the consolidation of marketing collateral, joint promotion via digital and social media, and/or development of visitor passes that allow multiple entries to the Region's attractions.

KEY STAKEHOLDERS

- **Industry members (lead)**
- Visit Sunshine Coast

DELIVERY TIMEFRAME

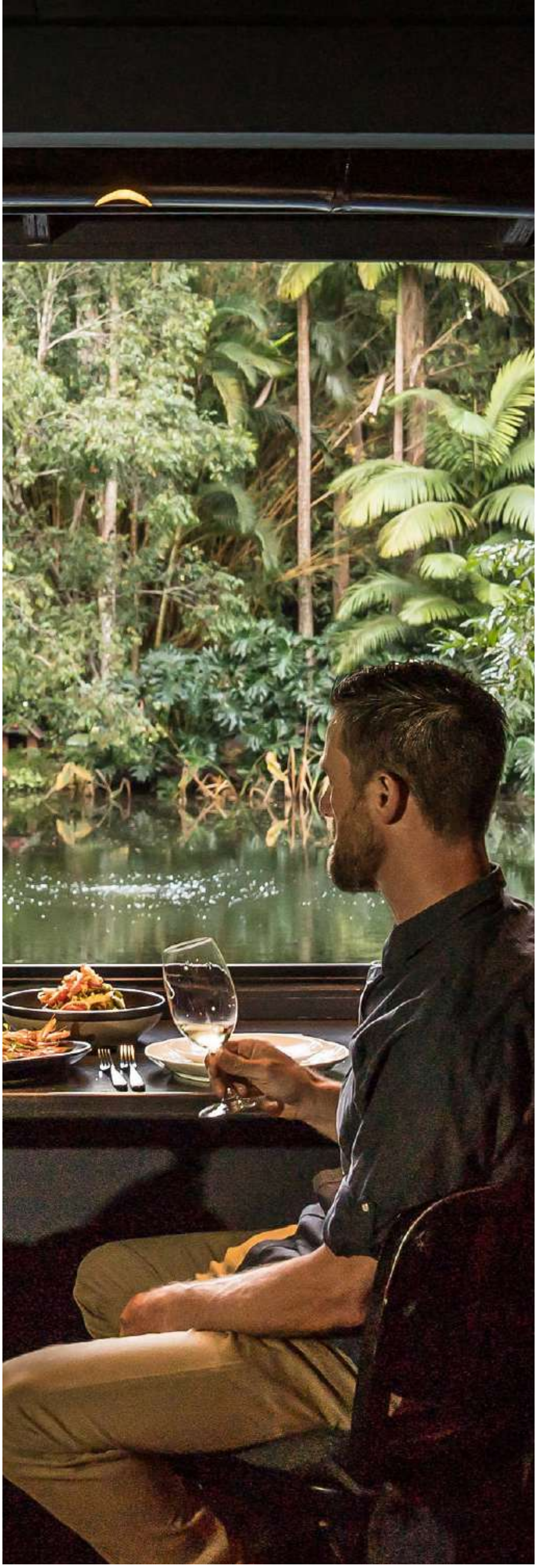
Short Term (0-1 years)

DELIVERY ACTIONS

1. Private operators, with the assistance of VSC, to engage and investigate the feasibility for collaboration and partnership opportunities.
2. Confirmation of joint marketing and promotional materials.
3. Development of joint visitor passes (i.e. multi-pass admissions), including confirmation of types of tickets, number of entries allowed, prices, etc.
4. VSC to help promote product visitor attractions, in collaboration with private operators, and facilitate distribution of marketing materials.

OUTCOMES

- Increases in visitation to the major attractions and dispersal/yield in the hinterland region.
- Improve the Region's 'Product Rich' competitive advantage..



TOURISM ENABLING PRIORITY PROJECTS

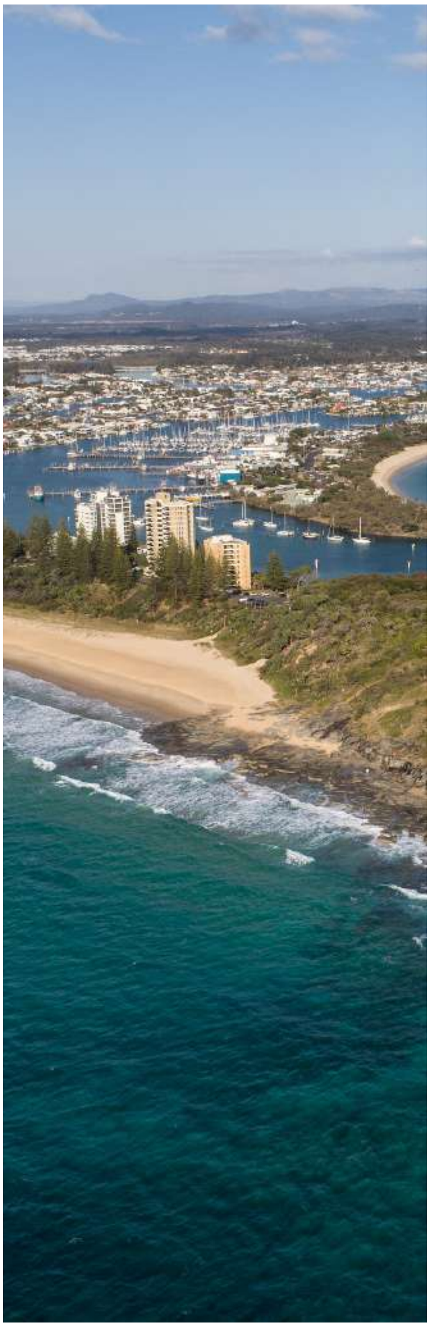
The following summarises the broader tourism-enabling priority projects that are indirectly related to tourism and/or the responsibility of third-party organisations. This includes existing major projects already in the pipeline, as well as proposed new projects that can help influence the tourism industry through increases in visitation and yield.

THEME 5

Major Infrastructure Development

Objective: Develop major public sector infrastructure projects to support economic growth within the key urban centres and accommodate projected increases in visitation.

VSC can advocate and support for government-led economic development projects that may indirectly benefit tourism



PROJECT 14

Sunshine Coast Airport Expansion Project [12]

LEAD ORGANISATIONS

Palisades (Sunshine Coast Airport)

STATUS & TIMEFRAME

Implementation (runway completion by the end of 2020)

LOCATION

Marcoola, Sunshine Coast

PROJECT DESCRIPTION AND IMPACT ON TOURISM

The expansion project will deliver a new runway compliant with regulatory standards, runway end taxiway loops, an expanded apron and terminal facilities, new access roads and utilities. The project will enable direct flights to more destinations across Australia, Asia and the Western Pacific.

PROJECT 15

Sunshine Coast Light Rail Project [13]

LEAD ORGANISATIONS

Sunshine Coast Council

STATUS & TIMEFRAME

Planning (Stage 1 completion by 2025-26)

LOCATION

Sunshine Coast

PROJECT DESCRIPTION AND IMPACT ON TOURISM

Intra-regional light rail to increase connectivity between regional destinations and improve access/dispersal for visitors.

PROJECT 16

Sunshine Coast Entertainment, Convention & Exhibition Centre

LEAD ORGANISATIONS

Sunshine Coast Council

STATUS & TIMEFRAME

Concept Stage

LOCATION

Sunshine Coast (TBC)

PROJECT DESCRIPTION AND IMPACT ON TOURISM

A state-of-the-art large-scale convention centre for the Region, with capacity of around 5,000. This would drive several economic benefits for tourism and drive increases in the business and conference visitor market.

[12] Sunshine Coast Airport 2016
[13] Sunshine Coast Investment Prospectus 2019

PROJECT 17

International Broadband Network (Digital)[14]

LEAD ORGANISATIONS

Sunshine Coast Council

STATUS & TIMEFRAME

Implementation (Completion by 2020)

LOCATION

Sunshine Coast

PROJECT DESCRIPTION AND IMPACT ON TOURISM

The delivery of international broadband submarine cable infrastructure which will provide the fastest data and telecommunications transmission from the eastern seaboard of Australia to Asia and direct connection to the United States. This will assist several industries related to tourism, including health and wellbeing, major events, food and agribusiness and local hospitality businesses

PROJECT 18

Maroochydore City Centre [15]

LEAD ORGANISATIONS

Sunshine Coast Council

STATUS & TIMEFRAME

Implementation

LOCATION

Maroochydore, Sunshine Coast

PROJECT DESCRIPTION AND IMPACT ON TOURISM

A total of over 193,000 sqm of pre-approved developable land to create a city with a commercial, retail, residential and mixed-use focus. It will also include an entertainment precinct. This will attract visitation, enhance the level of visitor amenity and fill-in infrastructure gaps

THEME 6

Accommodation

Objective: Improve and diversify the accommodation offer in the region matched to contemporary market demands and future visitation needs.

VSC can support government in preparing an investment prospectus for the private sector and advocate for accommodation investment where there is a market need.

PROJECT 19

Investment in Additional Accommodation Facilities

LEAD ORGANISATIONS

Private Sector (All Councils)

STATUS & TIMEFRAME

Concept Stage

LOCATION

Sunshine Coast Region

PROJECT DESCRIPTION AND IMPACT ON TOURISM

Development of 38 additional accommodation establishments across a range of typologies, to improve the quality and diversity of accommodation stock and meet projected growth in visitor demand.

[14] Sunshine Coast Investment Prospectus 2019
[15] https://www.sunshinecoast.qld.gov.au/Council/Planning-and-Projects/Major-Regional-Projects/Maroochydore-City-Centre

THEME 7

Experience & Product Development

Objective: Improve and develop the region's tourism attractions to enhance the visitor experience, support growth in visitation and increase yield

VSC to advocate for, and publicly support, private sector projects that can indirectly benefit the tourism industry.

PROJECT 20

Sunshine Coast Hinterland Regional Art Gallery

LEAD ORGANISATIONS

Private Sector, Sunshine Coast Council

STATUS & TIMEFRAME

Concept Stage

LOCATION

Beerwah, Sunshine Coast

PROJECT DESCRIPTION AND IMPACT ON TOURISM

An iconic gallery that is a destination in its own right to improve cultural tourism, attract a higher volume of arts & culture visitors and meet an existing product gap

PROJECT 21

Noosa Regional Art Gallery & Cultural Centre [16]

LEAD ORGANISATIONS

Private Sector, Noosa Council

STATUS & TIMEFRAME

Concept Stage

LOCATION

Tewantin, Noosa

PROJECT DESCRIPTION AND IMPACT ON TOURISM

A new regional gallery that could be a tourist destination and improve the arts & culture experience in Noosa. A signature gallery could improve cultural tourism and meet an existing product gap.

PROJECT 22

Big Pineapple Masterplan [17]

LEAD ORGANISATIONS

Private Sector

STATUS & TIMEFRAME

Planning Stage

LOCATION

Woombye, Sunshine Coast

PROJECT DESCRIPTION AND IMPACT ON TOURISM

A whole of site $150 million master plan to guide a successful, sustainable future for the Big Pineapple, which could facilitate a step-change in tourism for the hinterland area. Planned uses include: Food and tourism hub; a water park; TreeTop Challenge; Wildlife HQ Zoo; Events space; Accommodation (including an RV park, glamping, eco-villas and hotel); Food production, R&D and distribution; Travel centre including a service station; school camp facilities.

PROJECT 23

Glasshouse Mountains Precinct Masterplan

LEAD ORGANISATIONS

Sunshine Coast Council

STATUS & TIMEFRAME

Concept Stage

LOCATION

Glasshouse Mountains, Sunshine Coast

PROJECT DESCRIPTION AND IMPACT ON TOURISM

A masterplan to improve the visitor experience and develop supporting infrastructure that will increase visitation, yield and length of stay in the area. This could include nature-based outdoor activities such as walking/cycling trials, as well as lookout points and visitor amenities

PROJECT 24

Pumicestone Passage Precinct Masterplan

LEAD ORGANISATIONS

Sunshine Coast Council

STATUS & TIMEFRAME

Concept Stage

LOCATION

Caloundra, Sunshine Coast

PROJECT DESCRIPTION AND IMPACT ON TOURISM

A masterplan to improve this UNESCO site and leverage the natural assets to attract visitors and provide eco-tourism activities. This should include increasing the profile of the site, improving visitor access and providing water-based recreation.

PROJECT 25

Public Art Strategy [18]

LEAD ORGANISATIONS

Sunshine Coast Council, Noosa Council

STATUS & TIMEFRAME

Concept Stage

LOCATION

Sunshine Coast, Noosa

PROJECT DESCRIPTION AND IMPACT ON TOURISM

A regional strategy to help develop and deliver a public arts program that strengthen the arts and culture product across the Region (inc. installations, trails, public space activation, etc.). This will attract visitors seeking cultural experiences and increase the range of tourism product in the Region

[16] Noosa Cultural Plan 2018 – 2023
[17] https://www.bigpineapple.com.au/
[18] Noosa Cultural Plan 2018 – 2023; Sunshine Coast Arts Plan 2018-2038

APPENDICES

Appendix A : Tourism Enabling Projects - Other Opportunities

The tourism enabling priority projects are complemented by more localised projects that could still enhance tourism on a smaller scale. These projects are likely to impact tourism at a sub-regional or local level. Although they are not a priority focus for this DTP, these reflect other opportunities that could be supported or endorsed by VSC.

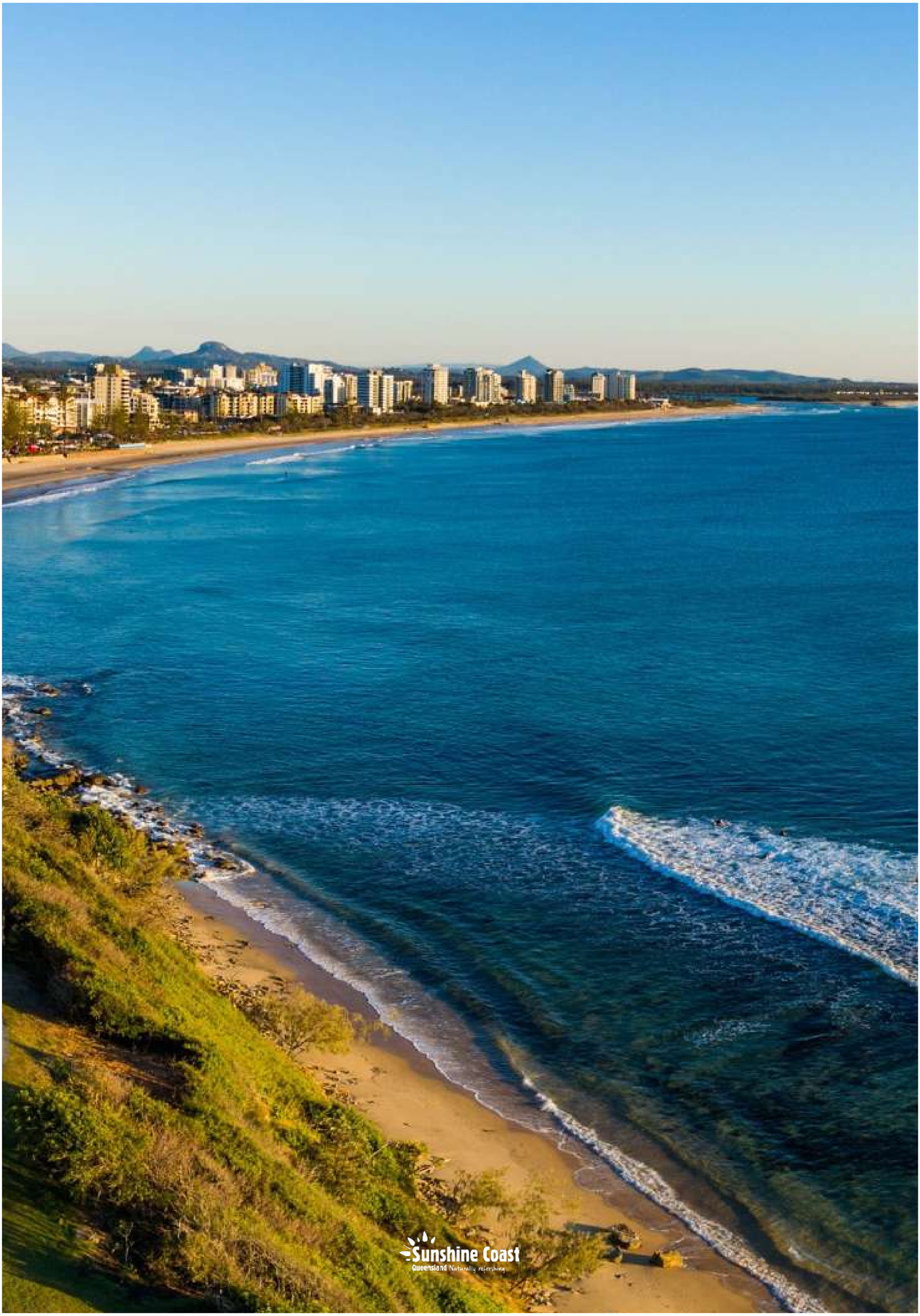
Project	Theme	Lead Organisations	Status	Location	Description and Impact on Tourism
Develop Integrated Heritage Shopping Precincts [20]	Experience & Product Development	Gympie Council	Concept	Gympie City, Gympie	Create a tourism shopping precinct within Gympie City that offers unique heritage values.
Noosa Cultural & Heritage Strategy [21]	Experience & Product Development	Noosa Council	Concept	Noosa	Development of a strategy to help capture and tell the unique story of Noosa, in order to improve awareness, recognition and reputation of Noosa as a cultural destination
Beachfront Wedding Venue	Experience & Product Development	Private Sector	Concept	Rainbow Beach, Gympie	A boutique wedding (and small conference) venue that meets a gap in the market and leverages the area's natural assets. This requires a feasibility study to examine its impact on the wedding market and visitation
Noosa Event & Function Facility [22]	Experience & Product Development	Private Sector	Concept	Noosa Heads, Noosa	Develop a new signature venue in Noosa to help build an iconic events calendar and encourage off-peak visitation. This would also require a feasibility study to assess its viability and impact on tourism
Actventure Water Park & Resort	Experience & Product Development	Private Sector	Planning	Beerwah, Sunshine Coast	Actventure is designed to be an integrated lifestyle, tourist and active theme park development and the first major integrated tourism resort on the iconic Sunshine Coast. This could help activate hinterland tourism and increase the volume and value of visitation
The Big Barrel Project	Experience & Product Development	Private Sector	Implementation	Maleny, Sunshine Coast	Infrastructure improvements and upgrades to the Big Barrel, including: a wellness centre/day spa; function centre; restaurant; lookouts
Upgrade Barnacles Dolphin Centre [23]	Experience & Product Development	Private Sector	Concept	Tin Can Bay, Gympie	Upgrades to the attraction to improve the visitor experience and increase length of stay
Tin Can Bay Birdwatching Trail [24]	Experience & Product Development	Gympie Council	Concept	Tin Can Bay, Gympie	Leverage the area's wetland assets to create a state-of-the-art bird trail, with appropriate enabling infrastructure/signage, to attract the niche birdwatching market, encourage increases in visitation and length of stay

[20] Gympie Region Tourism Strategy 2019-24
[21] Noosa Cultural Plan 2018 – 2023
[22] Gympie Region Tourism Strategy 2019-24
[23] Gympie Region Tourism Strategy 2019-24
[24] Tourism Noosa Action Plan 2017-22

Appendix A : Tourism Enabling Projects - Other Opportunities (cont.)

Project	Theme	Lead Organisations	Status	Location	Description and Impact on Tourism
Expand the Mary Valley Rail Trail [25]	Experience & Product Development	Gympie Council	Concept	Mary Valley, Gympie	Expand the rail trail from Imbil to Amamoor, which will improve the cycling offer and help position the area as a cycling hub for tourists
Wildlife Experience Infrastructure [26]	Experience & Product Development	Private Sector Gympie Council	Concept	Mary Valley, Gympie	Improve the wildlife experience in the Mary Valley (and attract nature-based and international tourists) by offering a range of infrastructure and experiences, including: lookout points, boat launch sites, guided tours, etc.
Kilkivan Bird Trail [27]	Experience & Product Development	Gympie Council	Concept	Kilkivan, Gympie	Develop a state-of-the-art migratory bird experience, including supporting infrastructure, to attract the niche birdwatching market and encourage increases in visitation and length of stay. This could be delivered by a specialist nature tour company
Enhancements to the Whale Watching Experience	Experience & Product Development	Private Sector	Concept	Mooloolaba, Sunshine Coast	Additional infrastructure (e.g. boats) and signage to increase the capacity and raise the profile of a unique nature-based experience. This has the potential to increase visitation, particularly the international market
Gympie Conference Centre [28]	Major Public Infrastructure Development	Private Sector	Concept	Gympie City, Gympie	Development of a conference centre in Gympie to compete in the small-medium business market. A feasibility study is required to assess its viability and impact on visitation
Multi-Purpose Indoor Sports Facility [29]	Major Public Infrastructure Development	Gympie Council	Concept	Gympie City, Gympie	Development of a conference centre in Gympie to fill a gap in the area's infrastructure, as well as compete in the sports market (inc. regional, state and national events). A feasibility study is required to assess its viability and impact on visitation
Mooloolaba Foreshore Revitalisation Project [30]	Major Public Infrastructure Development	Sunshine Coast Council	Implementation (Stage 1 completed end of 2020)	Mooloolaba, Sunshine Coast	The revitalised foreshore will feature a wide, continuous waterfront pedestrian promenade and separated cycle path. An additional 40 per cent of public parkland will cater to a variety of activities and experiences - from family barbecues on the lawn to hosting weddings, markets, festivals and events. This will drive increases in general usage and visitation to the area

[25-29] Gympie Region Tourism Strategy 2019-24
[30] https://www.sunshinecoast.qld.gov.au/Council/Planning-and-Projects/Infrastructure-Projects/Mooloolaba-Foreshore-Revitalisation-Project


Sunshine Coast
Queensland Naturally refreshing