


NOOSA QUARTERLY VISITOR FORECAST

TOURISM
NOOSA

SUMMER OUTLOOK

An aerial photograph of Noosa, Queensland, Australia, showing a long, sandy beach curving along the coast. The beach is bordered by a dense residential area with many multi-story buildings and houses. In the background, a large, forested hill rises above the town. The sky is clear and blue, suggesting a bright day.

Welcome to the first of Tourism Noosa's seasonal visitor forecasts that will provide local businesses and organisations with data and insights into visitor bookings for the coming months, along with overviews of visitor spend and occupancy from the preceding quarter.

This information has been compiled to assist your business with benchmarking, planning and forecasting, and to help inform a collective understanding of the value of tourism to Noosa's economy.

Included in the document are comparisons to other Queensland tourism regions to show how Noosa's performance is tracking alongside current travel trends.

Our data is sourced from Tourism Research Australia (TRA) and our Noosa Travel Insights Hub (through Localis) – details can be found at the end of this document.

We hope these quarterly outlooks become invaluable to your business. We are keen to hear whether the insights published are consistent with what you are seeing in your own business, and if there is other statistical information you would like to see regarding visitors to Noosa – we will do our best to include it in future editions. Please email members@tourismnoosa.com.au with any feedback about the content of this first edition, or any insights you're seeing around changes in visitor activity gleaned from your own business that you feel we should be aware of.

If your forward bookings are softer than you would like and could do with a boost, Tourism Noosa offers members a range of marketing and other opportunities to support your existing activity – please contact marketing@tourismnoosa.com.au to discuss your needs or contact members@tourismnoosa.com.au for any other member-related queries.

HOT TIP FOR SUMMER:

If you are a member and have accommodation or tour vacancies coming into Christmas or throughout the holidays, contact our Noosa Visitor Information Centre at info@tourismnoosa.com.au and let them know!

At this time of year, hundreds of people pop into the Centre, located in Hastings Street, every day, looking for things to do, and many are seeking last-minute bookings. Updating our team helps them keep you in mind when talking with our guests.

We hope this information is of value to your business.

ACCOMMODATION FORECASTS:

DEC 2024 – FEB 2025

Forward bookings across the Noosa region as at 16 December 2024, compared to bookings for the same time period last year. Please note this is an average of online booking results for all accommodation properties (including short-term accommodation), from budget to premium products across the entire Noosa Shire, including coastal and hinterland areas.

FUTURE OCCUPANCY IN NOOSA SHIRE

Average bookings for summer 2024-2025 are similar to or slightly ahead of the same period last year.

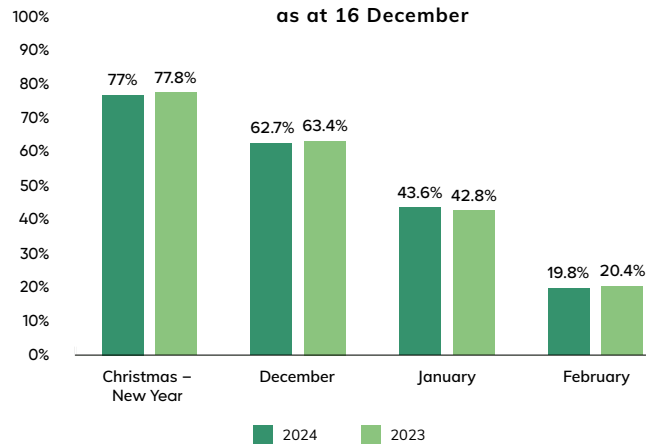
Bookings for the Christmas – New Year week follow a similar trend, currently at 77%, compared to 77.8% last year.

Bookings this year have generally been 5-10% below the corresponding period last year, however have strengthened in the past 2-3 months.

Source: Noosa Travel Insights Hub, Localis, as at 16 December 2024.

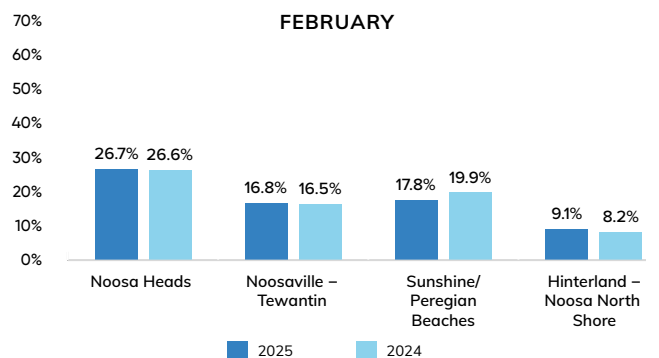
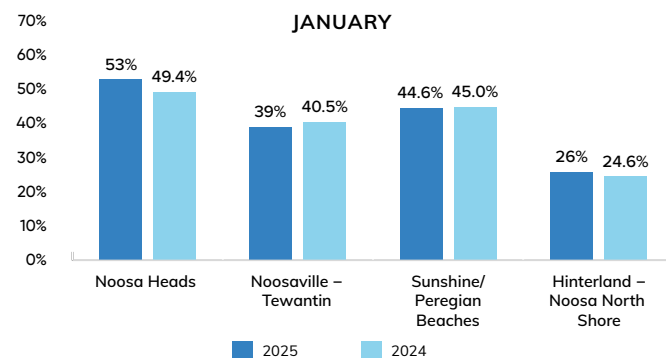
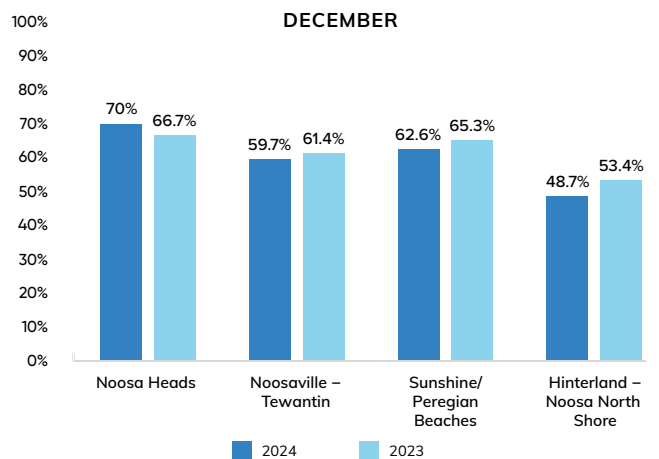
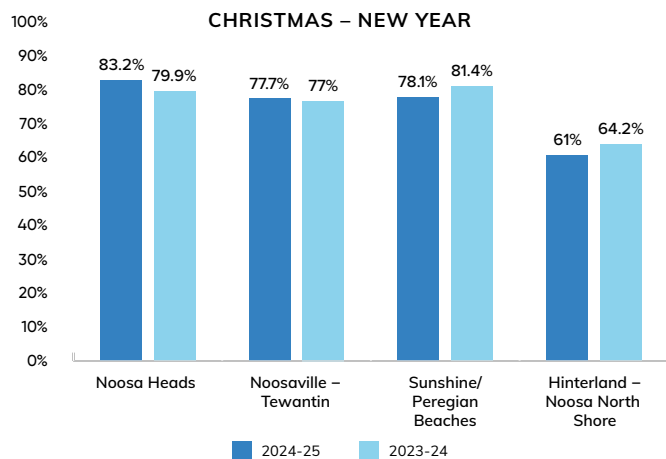


AVERAGE FUTURE OCCUPANCY ACROSS NOOSA as at 16 December



FUTURE OCCUPANCY IN NOOSA'S VILLAGES

This is an average of results for accommodation properties, from budget to premium products across each of Noosa's precincts.



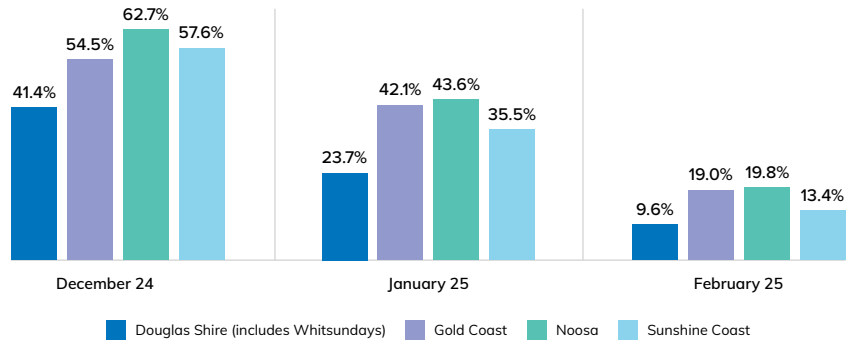
Source: Noosa Travel Insights Hub, Localis, as at 16 December 2024.

LGA COMPARISON

FORWARD BOOKINGS – LOCAL GOVERNMENT AREA (LGA) COMPARISONS as at 16 Dec 2024

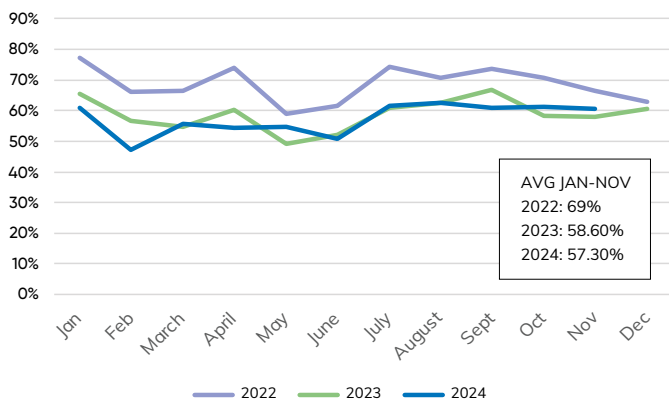
Accommodation bookings for the Noosa region over summer are up to 20% ahead of competitor LGA (Local Government Area) regions in Queensland.

Source: Noosa Travel Insights Hub, Localis, as at 16 December 2024.



LOOKING BACK: ACCOMMODATION OCCUPANCY JAN-NOV 2024

HISTORICAL OCCUPANCY IN NOOSA REGION



Accommodation occupancy in the Noosa region this year has been on average 13% below the highs of 2022 (record year post-COVID), and is on par with last year, however October and November have been slightly stronger than last year. This trend is present across most Queensland destinations, indicating a change in visitor intent for travel.

Source: Noosa Travel Insights Hub, Localis.

NOOSA SHARE OF QLD VISITOR NIGHTS

Noosa's share of domestic visitor nights in Queensland, including our share from the higher-spending interstate visitors, increased slightly in the year to June 2024:

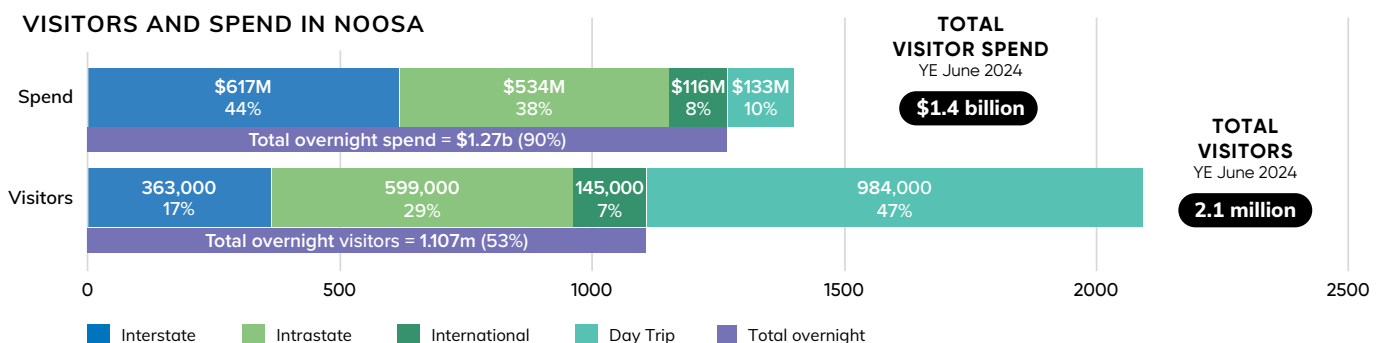
	2023	2024
Domestic visitor nights	3.7%	4.1%
Interstate visitor nights	5%	5.5%

Source: Tourism Research Australia National Visitor Survey, year ending June 2024.

VISITORS AND SPEND IN NOOSA

In the year ending June 2024, interstate travellers made up 17% of total domestic visitors (overnight + day-trip) and contributed 44% of domestic visitor spend, while day-trippers made up almost half of visitor numbers but only 10% of spend. Tourism Noosa does not directly market to day-trippers but concentrates our activity on overnight visitors (particularly interstate travellers) as they generally stay longer, spend more in-region and experience more of Noosa's offerings when visiting.

VISITORS AND SPEND IN NOOSA



SUPPORTING THE NOOSA ECONOMY

VISITOR SPEND

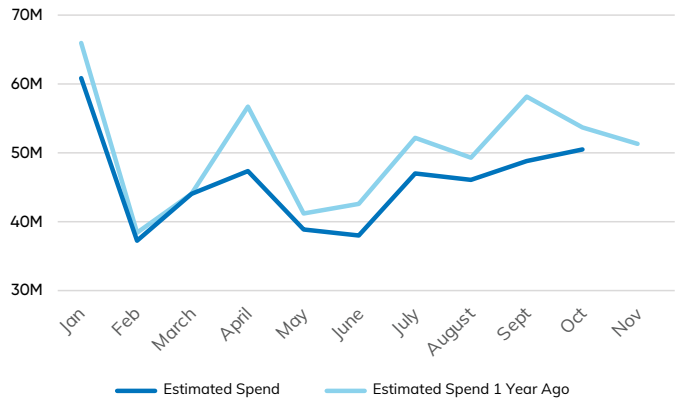
Data below that is sourced from Noosa Travel Insights Hub, Localis is based on Visa card spend* in the Noosa Shire at the point of sale (excludes online and pre-visit spend). The first quarter of the year tracked on par with the previous year, however in-region Visa card spend since then has been lower.

VISA CARD SPEND BY VISITORS IN NOOSA (JAN - OCT)



Source: *Noosa Travel Insights Hub, Localis.

MONTHLY VISA CARD VISITOR SPEND IN NOOSA 2024 v 2023*



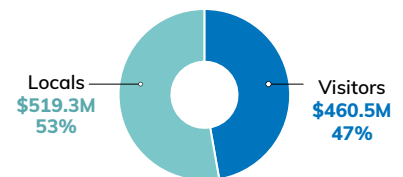
VISITOR AND LOCAL SPEND IN NOOSA

Visitors contributed just under half of the in-region Visa card spend in Noosa this year. Their share decreased more (-9%) than locals (-6%) in comparison to last year.

The holiday market has been most affected by headwinds such as the rising cost of living, slowing economic growth and competition from overseas destinations, according to Tourism and Events Queensland (TEQ)¹. TEQ's holiday intentions surveys indicate that consumers are still planning to take holidays, however, they may cut back on their length of trip or spending on their trip.

Source: Noosa Travel Insights Hub, Localis.

VISITORS AND LOCALS VISA CARD SPEND IN NOOSA JAN-OCT 2024



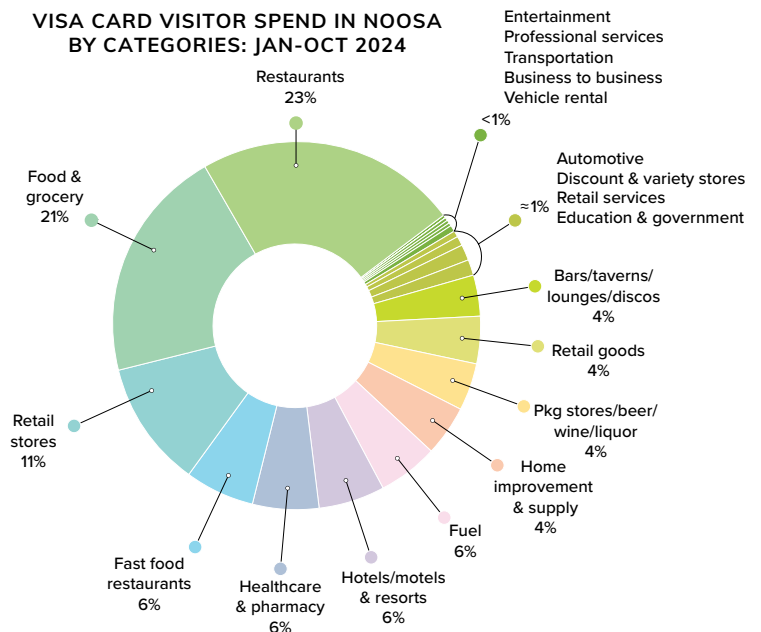
VISITOR SPEND BY CATEGORIES

Restaurants received almost one-quarter of in-region Visa card visitor spend in Noosa (23%, compared to 24% last year), with food and groceries accounting for a further 21% (20% last year). Retail stores, health care and non-traditional tourism businesses such as home improvement, professional services, business to business and automotive are included in the mix of visitor spend in Noosa.

Please note this represents in-region Visa card spend only, therefore costs such as pre-paid accommodation are not included.

Source: Noosa Travel Insights Hub, Localis.

VISA CARD VISITOR SPEND IN NOOSA BY CATEGORIES: JAN-OCT 2024



COMPARITIVE VISITOR SPEND IN QLD REGIONS

The spend data in this section is from Tourism Research Australia's National and International Visitor Surveys and includes whole-of-trip spend, before and during the visit. This section includes accommodation and pre-booked spend.

While the Noosa region is a local tourism destination that falls under the Sunshine Coast region in Tourism and Events Queensland's State tourism structure, our total overnight visitor spend (domestic + international) is larger than many funded regions. Noosa accounts for 3.7% of Qld's total overnight visitor spend.

Notes re spend in Qld regions:

* 3yr trend used for domestic spend in Fraser Coast, Mackay, Outback, Whitsundays; and international spend in Outback and Qld Country.

* Mackay international spend not published.

^ Includes Capricorn, Bundaberg and Gladstone.

Source: Tourism and Events Queensland's Domestic and International Tourism Snapshots, Year ending June 2024; Tourism Research Australia.

OVERNIGHT VISITOR SPEND IN QLD REGIONS YEAR ENDING JUNE 2024 (DOMESTIC + INTERNATIONAL)

Brisbane	\$10,696.5M
Gold Coast	\$6,532.8M
Tropical North Queensland	\$4,624.8M
Sunshine Coast (includes Noosa)	\$4,188.1M
Queensland Country	\$1,742.1M
Whitsundays	\$1,591.2M
Southern Great Barrier Reef^	\$1,562.8M
Townsville	\$1,262.1M
Outback Qld	\$815M
Mackay	\$782.5M
Fraser Coast	\$747M

NOOSA
\$1,267.2M

SOURCES

Tourism and Events Queensland's Domestic and International Tourism Snapshots, Year ending June 2024;
Tourism Research Australia.

Tourism Research Australia National and International Visitor Surveys, year ending June 2024.

Noosa Travel Insights Hub, Localis. Accommodation forecasts and occupancy data is aggregated from various online bookings platforms and other sources. Spend estimates are based on and extrapolated from aggregate, depersonalised card usage data provided by Visa, and incorporate data from other independent research sources.

¹*Tourism and Events Queensland Domestic Tourism Snapshot, year ending June 2024.*