



Noosa Shire Destination Management Plan Discussion Paper

Growing well together

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Purpose

The purpose of this Discussion Paper is to stimulate discussion, deliberation and feedback from our Noosa community, residents, businesses and stakeholders on how we collectively grow well together to sustain and protect the core values and iconic attributes of our place, to ensure Noosa Shire remains appealing and attractive to both residents and visitors.

This paper is an open invitation for everyone to have their say on how Noosa Shire can manage its success as a tourism destination and collectively ensure it remains a great place to live and visit. We all seek a lifestyle that aligns with community values, respects people and place and provides a balanced and sustainable economy for all.

Feedback from the Discussion Paper will inform the development of Noosa Council's **Destination Management Plan (DMP)** and set the direction for tourism in Noosa Shire over the next 5 – 10+ years, looking towards the 2032 Brisbane Olympics and Paralympics and beyond.

This paper is intended to prompt discussion and debate as a community and asks a series of questions such as:

1. **In ten years time, what would success look like for destination management in the Shire?**
2. **How can we ensure that living in and visiting Noosa Shire is a more balanced experience – for our community, environment and economy?**
3. **What are the priority opportunities and issues that should be addressed in the development of a Destination Management Plan for our Shire?**
4. **What could we measure to show we are successful in balancing the values of residents living here and our guests visiting Noosa?**
5. **What are some of the experiences and services in Noosa Shire you enjoy as a result of living in a tourism destination?**
6. **What should the role of the community, tourism industry and Council be as stewards of our beautiful region?**

Current Visitor Economy and Community Values.

Part One of this Discussion Paper describes Noosa Shire's current visitor economy, information about tourism and the characteristics and qualities the community values today. The World Travel and Tourism Council (WTTC) defines the visitor economy as any direct, indirect, and induced economic activity resulting from visitors' interactions with a destination outside their usual environment. It is a phrase used to describe the economic benefit of visitor activity not only for the industry directly related to tourism, but on a broader sense. The Visitor Economy includes all types of visitors to Noosa Shire.

Community Engagement

Part Two is about you.

This section provides you with a series of fact-based opportunities and issues outlining what is being experienced in Noosa Shire today, what initiatives Noosa Council currently has in place and is planning.

This is not an exhaustive list and you can add your own ideas in Council's Your Say survey and in the Workshops being held around the Shire in October, in the submission form at the end of this paper or just send us an email at mail@noosa.qld.gov.au. These opportunities and issues describe varying levels of action or response that could be taken.

For the purposes of this document, these approaches are called scenarios and are designed to test the level of change the community desires.

We are asking our community to consider these opportunities and issues and provide comment on the level of action or response that you would like in the future.

Community feedback will help inform the future DMP. This process puts the values and voice of the community first when considering the future of Noosa Shire.

Introduction

There is a compelling reason people want to live in and visit Noosa Shire.

Noosa Shire is a location highly prized for its pristine landscapes, contemporary coastal and hinterland lifestyle, strong environmental values, and warm year-round climate that lends itself to healthy outdoor living and wellbeing.

Noosa Shire is recognised internationally by UNESCO as a Biosphere Reserve where there is harmony between humans and nature and provides a home and employment to residents as well as a destination for domestic and international tourists.

The tourism sector is a beneficiary of the natural values and character of Noosa Shire but has also contributed substantially to the character of the Shire we know today. Many residents first experienced and fell in love with Noosa Shire as visitors and chose to relocate here. Many of the great places, services and infrastructure we now enjoy exist because of a strong visitor economy. However, we also know that seasonal peaks within the tourism cycle can impact resident lifestyles, local economy, amenity and the environment.

This is not a new challenge we are facing; this is also not a pro or anti tourism issue; this is about ensuring we continue to manage Noosa Shire's success and maintain the balance as an iconic destination and a great place to live. Noosa has a long and proud history of sustainable development and management of our place, of sound destination planning and management; however, over the last few years we have seen a peak in tourism demand and an increase in impacts within the community.

Now is the time to reconsider and refocus and ensure we have a clear and agreed collective vision for the future of Noosa Shire, one that is supported by the community.

This paper provides some history of Noosa Shire, facts on the current opportunities and issues of the visitor economy, outlines the range of actions that have

occurred to date and considers what else could be done to ensure balance is achieved going forward.

Community Sentiment & COVID-19 Impacts

The COVID-19 lockdowns presented Noosa Shire residents with an unprecedented opportunity to re-engage with their wonderful environment, iconic locations and outdoor experiences, and to rediscover what they valued most about the local lifestyle.

Residents were reminded of why they had chosen to live in Noosa Shire in the first place, and ... they liked it.

However, driven by the lack of visitation, the business community – primarily owned, managed, and staffed by local residents was significantly impacted during the pandemic, with more than 1,000 full time jobs being lost across all sectors of the economy.

During this time, the accommodation and food sector accounted for 47%* of all job losses in the Shire, more than double that of any other sector of the economy.

Some local businesses and services were lost to the community forever.

With the rest of Australia and much of the world in lockdown, the local tourism industry shifted its marketing and focus from interstate and international guests to the intrastate traveller, who mostly arrived in a vehicle.

COVID-19 also increased the popularity of short-term accommodation listings as people sought the security of holidaying in the one secure group. There was also an increase in the drive market day-tripper who did not want to plan a multi-day break due to lockdown concerns.

This change in the visitor demographic added to the strain on some levels of community patience.

*Source: Economy i.d.

Noosa Shire

This document acknowledges the Kabi Kabi people as the traditional owners of the lands and waters of Noosa Shire. We recognise that many Kabi Kabi people are part of the Noosa Shire community and Kabi Kabi lore plays a vital role in establishing the values of the Noosa Shire.

This Discussion Paper pays respect to Kabi Kabi elders past, present, and emerging and recognises Kabi Kabi representatives engaged in the Destination Management process with Council.

Established as a Shire in 1910, Noosa Shire covers approximately 870 square kilometres of coast and hinterland, 42% of which is protected through conservation tenure, compared to 9% across Queensland.

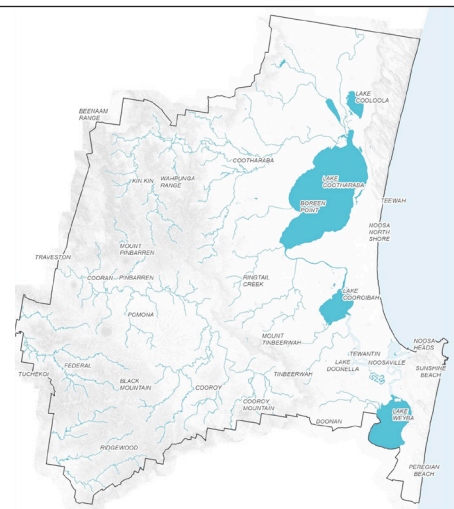


Figure 1: Noosa Shire Geographical Boundaries Source: Noosa Council

Enduring Environmental Legacy

The communities of Noosa Shire have always placed a high value on their natural environment, establishing Noosa Headlands as a reserve pre-1900's, creating wildlife sanctuaries in the 1930's to protect birdlife, and incorporating an area stretching along the coast to Coolool into the Noosa National Park to stop interest from developers.

Local protests stopped a sand mine proposal and the 1960's saw community organisations form and advocate strongly for greater protection of the local wildlife and environment.

Noosa Shire residents continued to advocate for the

Shire to remain a unique and special place, by opposing high rise developments, maintaining greenspace, and advocating for the protection of sensitive landscapes.

Noosa Council responded by placing greater focus on protecting the natural environment through a more constrained planning framework, and the introduction of a resident carrying capacity and development restrictions to guide future service levels and amenity needs in the region.

In 2007, Noosa Shire was awarded Queensland's first UNESCO Biosphere Reserve accreditation status in recognition of the high value placed on its natural environment, sustainable lifestyle, and a genuine commitment to reducing harmful environmental impacts.

Today, Noosa Shire is a collection of complementary coastal and hinterland communities, each with a very distinctive character and heritage, that are connected by the same enduring environmental values.

It is not just these environmental values of the region that form the basis of the Noosa Shire 'brand'; the residents and community are an underpinning influence that make the Shire so attractive to visitors from around the world.

Noosa Shire Community Today

Population 57,397	Total Businesses 7,620
Male 49% Female 51%	Largest Employer Accommodation & Food Services 3,970 people Tourism 3,720 people
Median Age 50 years QLD 38 years AUS 38 years	Total Labour Force 26,500 workers Tourism 14%

Figure 2: Snapshot of Noosa Shire Economy. Source: Economy.i.d. 2022

Background

1. Noosa Shire Community's Values and Response to Tourism

In 2021, Noosa Council undertook a comprehensive Livability Survey in conjunction with Place Score to better understand the top community values in Noosa Shire today.

'Elements of the natural environment' and 'protection of the natural environment' ranked highest across all Noosa Shire's communities.

These values are key reasons why residents choose to live in Noosa Shire and are also why people choose to visit. Noosa Shire is a destination defined by its nature, community values and beauty.

The respect and appreciation of the environment, the desire for environmental protection and a quality lifestyle have been priorities for Noosa Shire communities for decades. Residents seek confidence that economic and tourism growth and associated change do not adversely impact on the character, lifestyle and environment they enjoy.

The Value of Tourism to the Noosa Community Survey Report 2019 provided some insight into the residents' views on tourism. Most respondents indicated tourism as being good for the community and economy; however over 84% also agreed it can disrupt the lives of residents in relation to traffic, parking and restricted access to public facilities.

The Report found that businesses that directly benefit from tourism spend indicated their turnover was likely to be twice as large during peak season. The survey also highlighted staffing issues, particularly around securing affordable housing, with 55% of businesses identifying it was an issue with concerns around affordability and supply, and relativity to low wages.

Community sentiment on the impacts of short-term accommodation moving into residential neighbourhoods has increased over the last five years, with residents highlighting a loss of residential amenity and sense of community, and housing supply and affordability issues. In response Council has made major changes to the planning scheme and introduced local law to reduce the impacts.

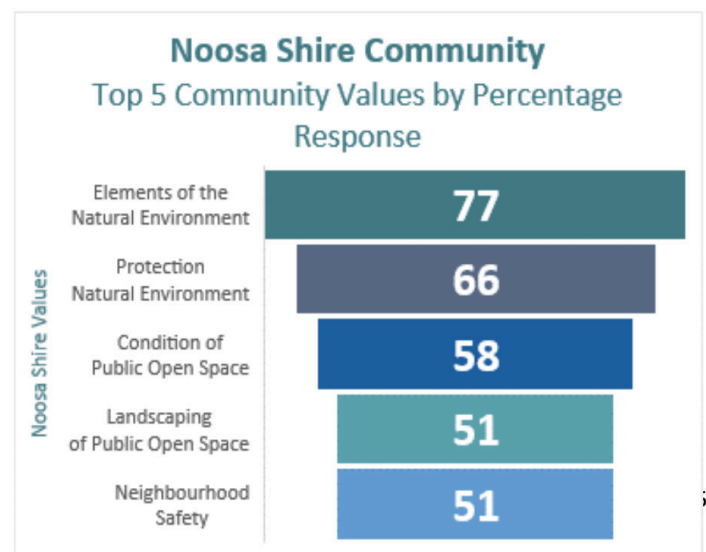


Figure 3: Top 5 Community Values. Source: Noosa Lifestyle Survey, 2021

Background

2. A Tourism Timeline

For many thousands of years, the lands and waters of the Noosa Shire have inspired visitation.

Initially, it was the traditional custodians of these lands and waters, the Kabi Kabi people, that brought visitors (neighbouring tribes) to the region for trade, annual cultural festivals, and traditional ceremonies.

Colonial interest in the region's lakes and estuaries began in the 1860's, led by the timber industry, followed by farmers and dairy businesses that established in the hinterland towns of Cooroy, Pomona, and Cooran.

By the 1870's, gold miners from the Gympie gold rush were holidaying along the banks of the Noosa River and in Noosa Headland.

2.1 Tourism and Population Growth

It was ex-service personnel in the 1950's, that firmly put Noosa Shire on the map as a holiday destination by bringing more and more families to the region - among them, surfers, and beach lovers.

By the late 1960's, Noosa Shire's reputation as a destination was being well established. Through the 1980's and 1990's, Noosa Shire's popularity as a Queensland family-favourite holiday destination continued to rise, particularly from the markets of Brisbane and Southeast Queensland.

Simultaneously, the region experienced an increase in net migration as young families searching for a more affordable lifestyle option north of Brisbane, chose to settle here - see figure 3. For the year ending June 2022, Noosa Shire's annual population growth of 0.92% is slower than regional Queensland (1.88%) and Queensland (2%) *.

Additionally, during this period of growth, increasing numbers of visitors from interstate markets of Sydney and Melbourne began travelling to the region and by the late 1990's, Noosa Shire's international reputation, especially in New Zealand, was growing.

Like many areas of SEQ and the Nation, Noosa Shire is faced with housing affordability challenges and increasing pressure around population and household growth. With this increasing pressure of growth in Noosa Shire and surrounding the SEQ Region, its important and necessary to properly plan for, prepare and manage these issues to protect and preserves what makes Noosa so special to the community and visitors.

*Source Economy i.d.

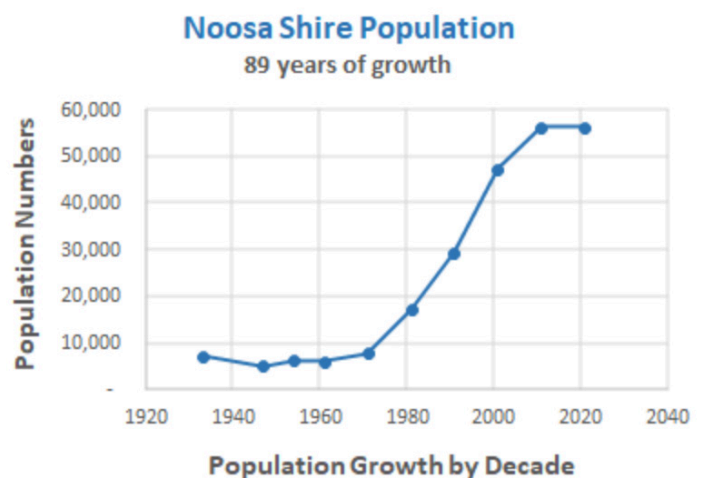


Figure 3: Population Growth 1920 – 2020 Source: Noosa Council

Background

2.2 Tourism in Noosa Shire Today

Since 2001, Noosa Shire's strong and enduring environmental legacy combined with its enviable lifestyle, has been the foundation for the region's strong brand position and successful marketing campaigns. Core values derived from the natural advantages of climate, landscape, clean air, open space, and waterways as well as local character, are exactly the same values and characteristics that visitors look for in their holiday choice.

Today, Noosa Shire welcomes more than 2 million overnight and daytrip visitors per annum, who contribute around \$1.7 Billion annually to the Noosa Shire economy.

For the year ending in December 2022, domestic overnight visitors to the region were Noosa Shire's largest volume market accounting for 53% of all visitors or 1.07M visitors.

Brisbane overnight visitors are Noosa Shire's single largest visitor market by volume (43% or 459,000), with frequent visits and shorter length of stay, characterised as the weekend getaway.

Brisbane overnight visitors account for 32% of total overnight spend in the region.

In 2022, 955,000 domestic day trippers spent \$103M in Noosa Shire compared to 1,070,000 overnight visitors who spent approximately \$1.6B in the region.

In 2019, prior to COVID-19, the last year we had 'normal' international visitation, international visitors represented 7% of all visitors to Noosa Shire, but spent more (\$113M) in Noosa Shire than the domestic day tripper (\$105M) that year.

Tourism today accounts for approximately 420* businesses across Noosa Shire and employs just over 3,700* people, 540 people fewer than pre COVID employment figures in 2018/19. Tourism employment represents 14%* of Noosa Shire's total employment (Queensland average 8%*), reinforcing the Shire's greater reliance on tourism compared to the rest of Queensland.

* 2019 was the last time we had a full cohort of international visitors.

* Source Economy i.d.

Visitor Comparisons 2022				
Metric	Intrastate	Interstate	Daytrip	International 2019*
Visitors	629,000	441,000	955,000	171,000
Spend \$M	\$689.3 (Bris \$510)	\$908.3	\$103.1	\$113
Av \$ per person	\$1,096	\$2,060	\$108	\$661
Av Length of Stay	2.7 nights	6.3 nights	-	5.7 nights

Figure 4: Year End 2022 Source: Tourism Research Australia

Background

2.3 Occupancy Rates

From January 2019 to year end 2022, the average occupancy rate of commercial accommodation across Noosa Shire was 61%; this includes the COVID-19 impacted months in 2020. Overall, the occupancy trendline is slowly rising, primarily due to a strong 2022. In 2019, the average occupancy level was 65%. In 2022, the average occupancy was 69.5%. For the whole of 2021 only one month exceeded 70% occupancy (January); however, in 2022, six months surpassed 70% occupancy.

The graph also shows that the first six months of 2023 are softer, with an average occupancy of 57%. We are seeing a return to more normal travel patterns as predicted by industry experts. This drop in occupancy is also compounded by a reduction in discretionary spending as the cost-of-living increases.

December and January are the standout peak season months, consistently on or above 70% occupancy (except 2023) followed by Easter and September school holidays. In 2022, the shoulder season months of February, May and October were busier with occupancy up 9% compared to 2019.

We need to note the impact of COVID-19 on this data. 2022 was an exceptional year for tourism domestically. COVID-19 fears had decreased significantly, pent-up travel demand was high and international travel was expensive, leading to a strong domestic tourism market.

* 2019 was the last time we had a full cohort of international visitors.
* Source Economy i.d.

Noosa Shire Occupancy Rates Jan 2019 - Jun 2023

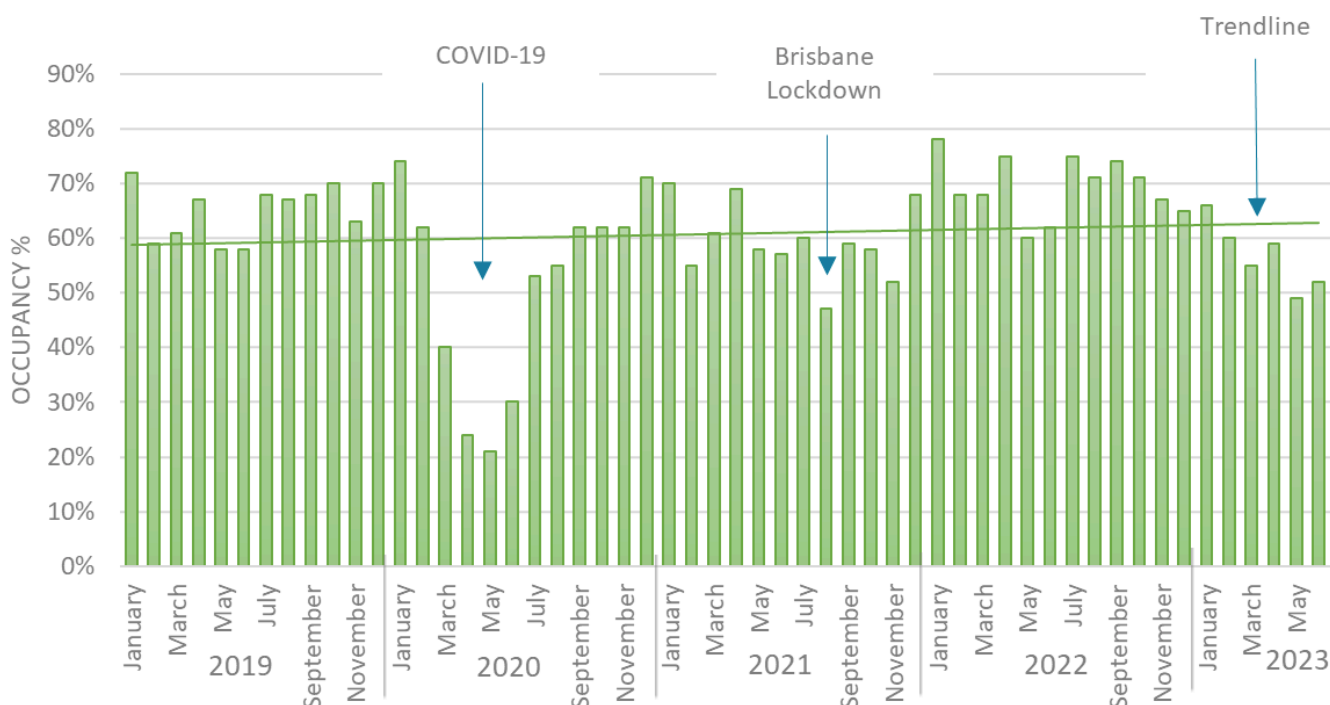


Figure 5: Year End 2022 Source: Localis, Noosa Travel Insights Hub, Tourism Noosa

Background

2.4 Noosa Shire Visitor Volume

The number of overall visitors to Noosa Shire has once again passed 2 million people (2.02m); however, the volume is still below the peaks of 2015-16 (2.32m) and 2018-19 (2.45m). This is mainly due to the lower numbers of daytrip visitors; however, it appears that this market is slowly trending upwards. It is very encouraging to see a return of the international market, with latest figures for the year ending March 2023 showing almost 40,000 visitors.

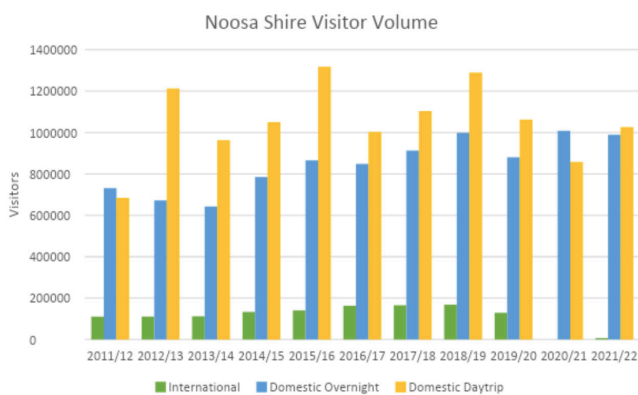


Figure 6: Noosa Shire Visitor Volume 2011/12 - 21/22. Source: Tourism Research Australia

2.5 Noosa Shire Visitor Spend

Despite the interruption of COVID-19 and fewer overall visitors, domestic visitor spend was at record levels for 2021-22, with total spend reaching \$1.15B. The latest figures by Tourism Research Australia have the year-end 2022 spend at \$1.7B. Some of the higher spend can be attributed to an increase in the number of overnight visitors, as well as an increase in the average daily rate (ADR) of accommodation, from \$233 per night in 2018-19 to \$298.50 per night in 2021-22.

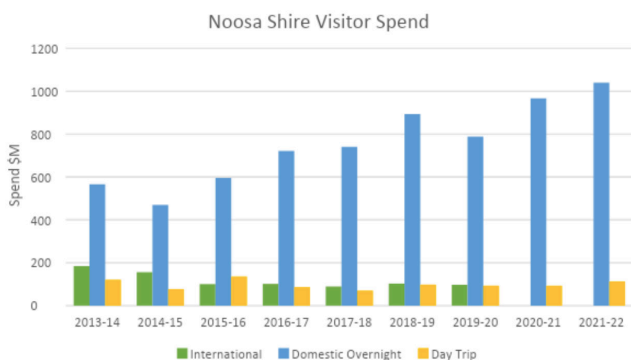


Figure 7: Noosa Shire Visitor Spend 2013/14 - 21/22. Source: Tourism Research Australia



Background

3. Noosa Shire's Attributes and Experiences

3.1 Iconic Locations

Research undertaken by the international tourism platform Trip Advisor indicates that Noosa Shire's stunning landscapes and lifestyle characteristics are powerful travel motivators for today's visitors.

Defined by its beautiful natural assets and relaxed lifestyle, in August 2023, Trip Advisor noted that visitors to the region ranked Noosa Shire's Top Attractions as being:

Noosa National Park

- One of Australia's oldest and most visited National Parks.
- Covers approximately 3,000ha including Noosa Headland, stretching south along the coast past Lake Weyba, Peregian Beach and Emu Mountain.
- Home to vulnerable and endangered wildlife including koala.
- Contains several walking trails and coastal tracks used by over 1 million visitors annually.

Noosa Main Beach

- 1.2km of North facing beach.
- The beach is separated by a rock groyne to combat erosion.
- Main Beach runs parallel to the Hastings Street accommodation, shopping and dining precinct.
- A patrolled beach with calm waters and small waves.
- A family favourite beach and regularly ranked as one of the best beaches in Australia.

Noosa River

- The major waterway of the Noosa Shire.
- Of cultural significance to the Kabi Kabi people.
- Recognised internationally for its high environmental and scenic values flowing from the catchment's rich biodiversity and habitat that includes the Noosa Everglades.
- Noosa Shire residents have a long-held and deep

social connection with the river as a valuable natural, social, and economic asset.

Noosa World Surfing Reserve

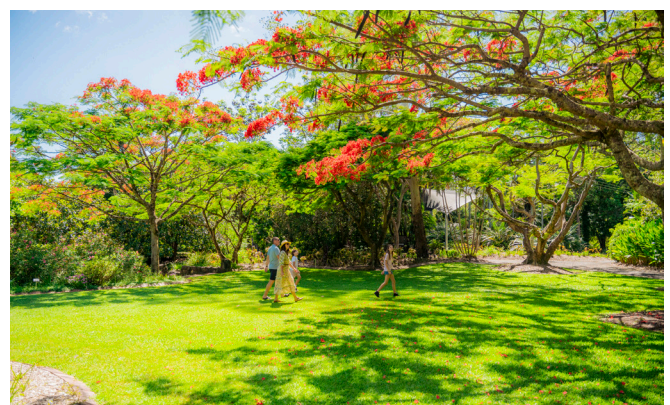
- Enacted in 2017 and covering world class point breaks from Noosa Main Beach around Noosa Headland to Sunshine Beach.
- The World Surfing Reserve aims to “proactively identify, designate and preserve outstanding waves, surf zones and surrounding environments around the world”.

Noosa North Shore

- An unspoilt wilderness just across the Noosa River with an uninterrupted beach stretching to Double Island Point.
- An experience for people who love the outdoors, the North Shore is a haven for those who like hiking, fishing and camping.
- Home to the Cooloola National Park and a key part of the Noosa and Great Sandy Biosphere Reserves, this pristine area is culturally and environmentally sensitive.

Noosa Hinterland

- Home to charming villages of unique character, surrounded by rolling hills, forest trails, wildlife, scenic lookouts and volcanic peaks.
- Beginning just outside of Tewantin and stretching from Doonan to Kin Kin, the Noosa Hinterland offers local produce markets, and a burgeoning café, brewery/ distillery, and artisan culture.



Background

3.2 Noosa Shire Experiences

It is not just the beauty of the environment that attracts residents and visitors to the region. Noosa Shire has a significant mix of paid and free experiences for locals and visitors to enjoy throughout the region.

These experiences include lakes, trails, markets, boat hire, parks, great restaurants and more.

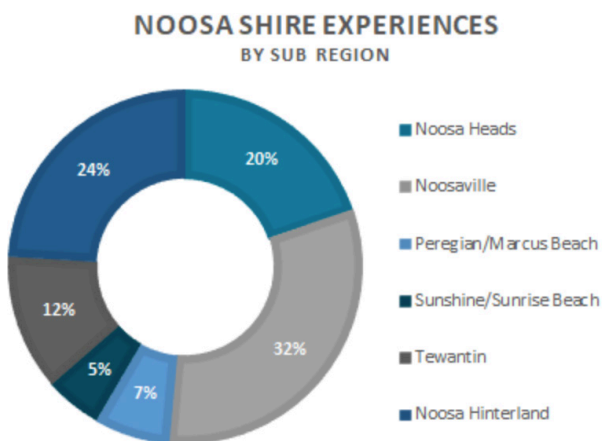


Figure 7: Experiences by sub region of Noosa Shire. Source: Noosa Council

Research undertaken by Noosa Council shows Noosaville has the most experiences (32%) to offer. The majority of these are associated with Noosa River and include boat hire.

The Hinterland also ranks highly with experiences (24%). This includes a mix of nature-based experiences like the Biosphere Trail Network and experiences like galleries and artisan businesses.

3.3 Noosa Shire Services

Services are defined as a system supplying a public need. These services supply the need of both a community member and a visitor.

Noosaville offers more services (28%) than other parts of the shire and includes 56 bus stops, 8 dentists and 5 pharmacies.

By comparison, Noosa Heads (including Noosa Junction) has 23% of all services, including 13 banks/ATM's, 11 supermarkets/ grocery stores and 5 Physiotherapists.

Noosa Shire residents enjoy many experiences and services compared to other regions with a similar population. Some of these experiences and services are only sustainable due to the high numbers of visitors that visit Noosa Shire regularly.

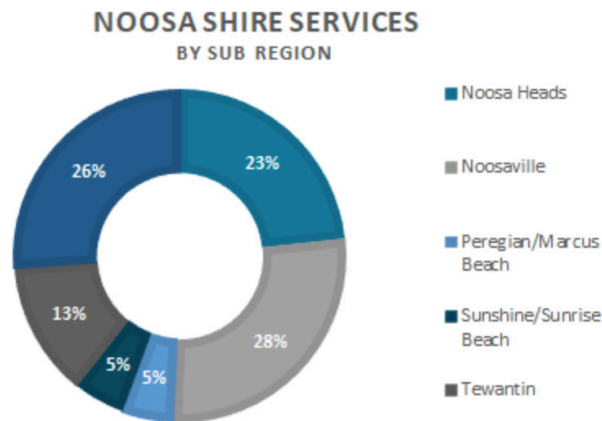


Figure 10: Services by sub region of Noosa Shire. Source: Noosa Council



Background

4. Visitor Accommodation

The rise of accommodation platforms such as Air BNB and Stayz, has changed the face of tourism accommodation in Noosa Shire and in many destinations around the world.

Only 8% of roomstock in Noosa Shire sits within a hotel, motel, or resort previously defined as “commercial accommodation”.

The bulk of Noosa Shire’s accommodation stock is self-contained short-term accommodation, like apartments, or home hosted accommodation (80%).

For the purpose of this report, short-term accommodation is a self-contained dwelling made available for periods of less than three consecutive months.

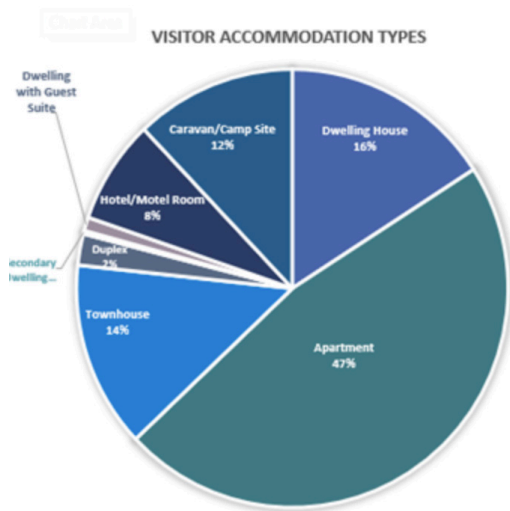


Figure 11: Noosa Shire Accommodation Types Source: TRA, Air DNA, Noosa Council STA Register

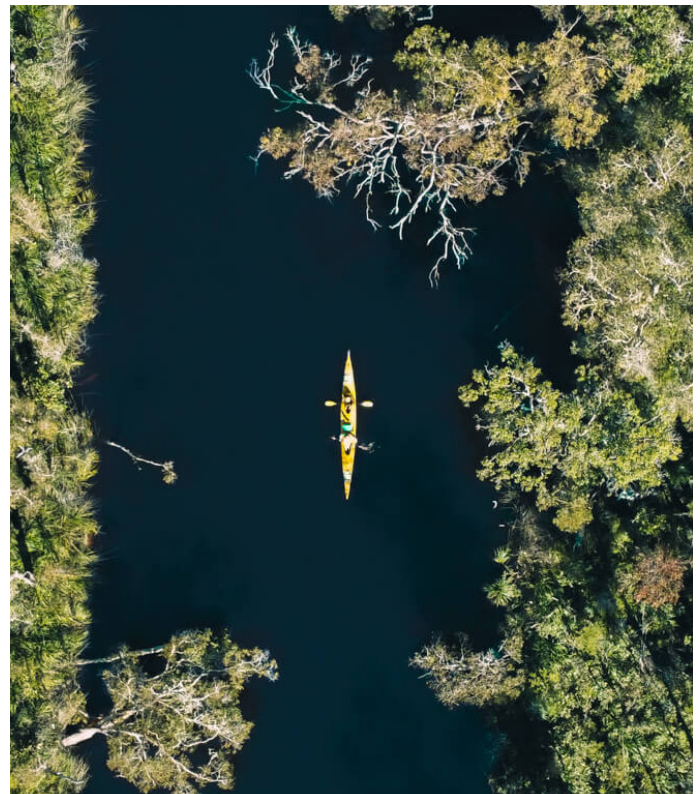
Short term Accommodation

Strata title apartments account for 47% of all visitor accommodation, while collectively, apartments, townhouses, duplexes, and dwelling houses account for 79% of all holiday accommodation in the region.

Noosa Heads accounts for 46% of all short-term accommodation properties in Noosa Shire, and the dwelling houses within this mix service a demand for a section of our visitor market who want to holiday as a group and/or in a private setting.

From the information outlined above, we can see that tourism adds enormous benefits to the economic well-being and lifestyle of Noosa Shire and its residents.

The next section of the Discussion Paper will review the current opportunities and issues of tourism in the Noosa Shire and provide an opportunity for the community to consider these and provide comments.



Community Action

Part Two of the Discussion Paper presents four scenarios (describing varying degrees of action or response) to be considered when reviewing the opportunities and issues. This is where we encourage your feedback and own ideas on what action or response you would like to see occur.

The Destination Management Plan which will be influenced by your feedback will aim to manage Noosa Shire in a responsible and regenerative manner, informed by the shared values of the community.

Regenerative tourism gained global trend momentum in 2020 and takes the idea of sustainable tourism one step further. It focuses on the net benefit of the visitor economy to a destination, looking at the social, environmental, cultural, and economic benefits.

Regenerative tourism is about making the destination better than how you found it by restoring any harm or impact that has already been done to the environment and creating conditions for nature and life to flourish. This process is about building on our strengths and making Noosa an even better place to live and visit.

The scenarios, issues and possible future actions below are underpinned by a regenerative approach, as well as a number of the 17 internationally adopted Sustainable Development Goals. In particular, the following Sustainable Development Goals are the most relevant:

- Goal 3 - Good health and wellbeing
- Goal 7 - Affordable and clean energy
- Goal 8 - Decent work and economic growth
- Goal 9 - Industry, innovation, and infrastructure
- Goal 11 - Sustainable cities and communities
- Goal 12 - Responsible consumption and production
- Goal 13 - Climate action
- Goal 14 - Life below water
- Goal 15 - Life on land

Further information on the Sustainable Development Goals can be found at <https://sdgs.un.org/goals>



Scenarios

Part 2.1 of the Discussion Paper presents four scenarios (describing varying levels of action or response), to be considered when reviewing the opportunities and issues outlined, in Part 2.2 of this document.

Each scenario has an increasing degree of action with examples of what each action may look like.

We are trying to determine the level of action or response our community and industry would like on each issue and opportunity currently being experienced in Noosa Shire today. While the scenarios have headings from Do Nothing to Transformational, these are just descriptions, and we are aware that they may be subjective and influenced by personal feelings and opinions.

We invite you to share your opinion with us.

Please utilize these scenarios as your reference when reviewing the opportunities and issues in Part Two B, and kindly share your thoughts on the level of change you wish to see in each individual opportunity and challenge outlined below.

Your response will help determine Council's future level of intervention.

The scenarios are:

<p>Do Nothing Scenario</p>	<p>Aspirational Scenario</p>
<p>Cease implementing plans or strategies resulting in any actions or interventions. The best course of action is to let things unfold naturally without interference.</p>	<p>Desired community supported improvements and actions that ensure sustainable growth of Noosa Shire's resident and visitor population.</p>
<p>Example Community no longer wishes Council to govern or manage potential impacts or opportunities affecting Noosa Shire.</p>	<p>Example Community wants Council to put in place more stringent measures that respond to our visitor and resident carrying capacity to avoid undesirable impacts on Noosa Shire values, character, local amenity and natural environment.</p>
<p>Steady State/Current Scenario</p>	<p>Transformational Scenario</p>
<p>Current or existing situation with gradual action without any major changes or disruptions.</p>	<p>Profound community led change resulting in a noticeable, positive and lasting alteration to Noosa Shire.</p>
<p>Example Community wants visitor and population growth and impacts to be managed by Council implementing current and planned strategies</p>	<p>Example Community wants waste and energy capturing targets and environmental management initiatives to be put in place that make Noosa Shire a global leader in regenerative destination management.</p>

Opportunities and Issues

Each table below identifies an opportunity and/or issue that is experienced in varying ways across different parts or throughout Noosa Shire. Additionally, it outlines a range of examples for Council to consider as potential future actions.

For each opportunity and issue, facts are presented, a range of existing Council initiatives included, and examples of potential actions that could be implemented are listed under the four scenarios.

Council is seeking your feedback on how you wish us to respond to these opportunities and issues and manage the visitor economy and destination in a responsible and regenerative manner. This process is about building on our strengths and making Noosa an even greater place to live and visit.

Please refer to the Community Response – Possible Future Actions for your comments.

Note, these are examples only to provide some context. Please add your own suggestions, depending on the level of change you desire.

The opportunities and issues have been identified by monitoring community discussion forums and reviewing previous community input and feedback from the following consultation processes: -

- Corporate Plan 2023 - 2028
- Noosa Housing Strategy 2022
- Noosa – Getting Waste Sorted 2022
- Noosa Liveability Survey 2021
- Local Law – Short Stay Letting and Home Hosted Accommodation 2021
- Noosa Plan 2020 planning scheme Community Engagement
- Value of Tourism to the Noosa Community Survey Report 2019

The specific opportunities and issues to consider, against the four scenarios outlined above, are:

- **Traffic Management**
- **Environment**
- **Waste Management**
- **Destination Marketing**
- **Visitor Accommodation**
- **Visitor Experiences and Services**
- **Major Events**
- **Governance**

Traffic Management

Traffic Congestion

- Noosa Shire has 25 days of heavy traffic congestion a year in peak locations such as Hastings Street.
- Over 14,000 vehicles entered the Hastings Street precinct (Counters located at Munna Pt Bridge, Noosa Parade and Noosa Drive adjacent to Lions Park) per day during Christmas to New Year period, with approximately 16,000 vehicles entering the precinct on New Years Eve 2022.
- 21% of people accessing the Hastings Street precinct on NYE 2022 were Noosa Shire locals. (based on mobile phone data)
- Noosa and Sunshine Coast local government areas have 332,000 registered passenger vehicles.
- Over 60% of Noosa Shire households have 2 or more vehicles despite the average household size being 2.4 persons. These figures are higher than state and national averages.
- 47% of visitors to Noosa Shire are day trippers (Tourism Research Australia YE 2022).
- 219,265 people caught the free bus during Christmas/NY and Easter period, removing approx. 54,000 vehicles from Noosa Shire roads (1 vehicle = 4 passengers).
- Noosa North Shore Ferry can cause congestion stretching back into Tewantin.
- Hinterland towns are experiencing traffic congestion and parking issues on weekends.
- 85% of residents use a vehicle when travelling around Noosa Shire. The top three reasons for travel are recreation 25%, shopping 25% and work 23%. Source: Department of Traffic and Main Roads.

Parking Congestion

- There are approximately 1,700 car parks in the Hastings Street precinct.
- Adding additional parking spaces in high use areas has failed to minimise traffic congestion.
- Parking spaces are costly and paid for by ratepayers.
- Limited boat trailer parking availability in Noosaville and Tewantin impacts the local residential streets.
- Protection of open spaces from being used for carparking is a community priority (source: Noosa Shire Liveability Study).

Current and Planned Council Initiatives

- Free weekend and holiday buses to encourage greater use of public transport.
- Park and Ride sites serviced every 15 minutes by free loop bus during busy periods.
- Ongoing promotion of sustainable transport options available during seasonal peaks.
- Traffic control measures prioritising pedestrians during peaks.
- Infrastructure prioritising pedestrians, bicycles, scooters, and public transport.
- Improving resident connectivity through:
 - Movement and Connectivity strategy
 - Northern Sunshine Coast Transport Strategy.
 - Real time parking, enabling variable consumer charges – possible introduction in late 2023.
 - Timed parking trial for areas of high parking congestion during seasonal peaks.
- Rideshare parking bays for Hastings Street workers.
- Priority parking for the disabled and elderly.

Community Response - Possible Future Actions

These are examples only

Do Nothing Scenario

- Stop trying to contain traffic and minimize parking congestion.

Steady State/Current Scenario

- Additional and improved Park and Ride sites.
- Open spaces/parks in highly congested areas not utilised for parking.

Aspirational Scenario

- Introduce timed paid parking on Hastings St and Gympie Terrace – permit for locals.
- Introduce one way traffic flow along Gympie Terrace and Noosa Parade during peak times.
- Increased investment in walking and cycling trails.

Transformational Scenario

- Make Hastings Street and Gympie Terrace pedestrian only zones during peak times (morning service deliveries, elderly/disabled parking maintained).
- Make Park Rd access to Noosa National Park by free bus only during peak times.

Environment

- The Noosa Shire brand is centered on “different by nature” recognising the enduring commitment to environmental protection and sustainable development. Approximately 42% of Noosa Shire is protected for conservation, compared to just 9% for Queensland.
- The community ranks ‘elements of the natural environment’ (77%) and ‘protection of the natural environment’ (66%) as the strongest contributors to local liveability.
- Noosa Shire’s community and Noosa Council have established a legacy of environmental stewardship dating back to the early 1960s.
- Noosa Shire has been recognised by UNESCO as a Biosphere Reserve since 2007.
- Noosa River is one of the healthiest river systems in SEQ, with a consistent A- waterway health rating on average since 2015.
- The Noosa Everglades are one of only two Everglade ecosystems worldwide.
- Noosa Shire has 45kms of coastline and internationally significant ecosystems in the Noosa River Catchment.
- Noosa Shire is located in the Macpherson-Macleay overlap where tropical and temperate climatic zones meet, creating one of the most biodiverse regions in Australia.
- Noosa Council funds its Local Tourism Organisation (LTO) to develop and implement industry leading Sustainability Programs such as Plastic Free Noosa, Tread Lightly & Trees for Tourism.
- In 2019 Noosa Council became the first local government in QLD to declare a “Climate Emergency”, which recognises that urgent action is required by all levels of government.
- Noosa Heads around to Sunshine Beach was designated a World Surfing Reserve in 2020.

Current and Planned Council Initiatives

- The Environment is a key strategic theme in Council's 2023 Noosa Shire Corporate Plan.
- Council's seven Sustainability Principles set a clear aim for a nature positive, low carbon and climate resilient Noosa Shire.
- Various Council plans and strategies focus on protection and enhancement of the natural environment, these include:
 - Environment Strategy
 - Climate Change Response Plan
 - Noosa River Catchment Management Plan
 - Eastern Beaches Foreshore Management Plan
 - Noosa Trails Master Plan 2020
 - Climate Change Response Plan
 - Land for Wildlife
 - Oyster Reef Restoration Project
 - Urban Greening Master Plan
- Noosa Council continues to fund and partner with the Noosa Biosphere Reserve Foundation.
- Council is part of a group investigating sustainable use of Noosa North Shore.
- Destination Eco Accreditation Certification

Community Response - Possible Future Actions

These are examples only

Do Nothing Scenario

- No further investment in the environment.

Steady State/Current Scenario

- Improve the sustainability management of iconic locations (e.g., Noosa Main Beach, Noosa National Park, Noosa North Shore).
- Council target of Net Zero Carbon Emissions by 2026.

Aspirational Scenario

- Stop all traffic onto Noosa North Shore two hours either side of high tide.
- Develop a Visitor Pledge requiring a commitment to our community principles and Kabi Kabi cultural values to care for the Shire.

Transformative Scenario

- Explore alternative sources of funding to implement environment and community programs
- Measure the value of the Noosa Shire environment to determine its worth and understand the cost of future impacts on
 - the environment – (Accounting for Nature).

Waste Management

- Noosa Shire has a Net Zero Emissions target by 2026.
- Noosa Shire's landfill accounts for approximately 61% of the Shire's carbon emissions.
- Noosa Shire general waste bins contain 40% compostable organic waste (kitchen scraps/garden clippings). Organic matter buried in landfill produces potent methane gas.
- Approximately half the content of one bin from Hastings St was single use coffee cups.
- In 1996 Noosa Council diverted only 7% of waste generated.
- Noosa Shire generated 90,534T (47,558T or 52% diverted from landfill) of waste in FY22-23 approx 1.57 T per person (based on a June 2022 population of 57,397) inclusive of commercial waste.
- Solar powered smart bins installed in Hastings Street self-compact rubbish, reducing the number of times they need to be emptied, resulting in lower emissions and traffic congestion.
- In 21/22 Noosa Council diverted from landfill 16,553T of garden waste, 6,376 mattresses, 372T of cardboard and 52T of batteries.
- Based on current use, Noosa Shire landfill site has a remaining lifecycle of 49 years.

Current and Planned Council Initiatives

- Council is currently updating the Waste Strategy.
- Council is trialling a new 'container for change' reverse vending machine capable of separating cans and bottles.
- Council has approved a new polystyrene compacting machine, diverting 50 tonnes from landfill.
- Council has committed to the National Garage Sale Trails Campaign for 2023 and 2024.
- 'Recycle Mate' - provides up to date information on what item goes into which waste stream. First Council nationally to invest and integrate Recycle Mate live widget functionality into Noosa Council website. Widget is easily accessible to residents and visitors of Noosa Shire.
- Educational recycling videos created for the community using easy-to-understand content.
- Smart bins were trialled in Noosa Heads, using solar energy to compact rubbish resulting in cost savings and fewer CO2 emissions as they are emptied less often.
- Bin Sensors installed to measure waste generation and improve collection cycles to reduce emissions.
- Commercial Cardboard Recycling initiatives.
- Council program in place that encourages recycling between businesses across the Shire (avoiding landfill).
- Plastic Free Noosa program delivered by Tourism Noosa

Community Response - Possible Future Actions

These are examples only

Do Nothing Scenario

- Stop education about waste behavior and recycling.

Steady State/Current Scenario

- Provide more plastic recycling opportunities around the Shire.
- Encourage the tourism industry and tourism precincts to improve their recycling methods.

Aspirational Scenario

- Commercial precincts across the Shire to investigate and explore reusable systems and methods to 'avoid' single-use waste.
- 'Roll-out' Shire wide solar powered smart bins.

Transformative Scenario

- Convert all green and food waste to energy.
- Ban single use coffee cups along Hastings Street and Gympie Terrace.

Destination Marketing

Visitor Numbers

- 2 million visitors travelled to Noosa Shire in 2022, spending \$1.7B
- In 2018/19 (Pre COVID), 93% of all visitors to Noosa Shire were domestic.
- In 2022 - 47% of visitors were day trippers.
- Brisbane, Sydney, and Melbourne are Noosa Shire's largest visitor source markets.
- 43% of overnight visitors come from Brisbane.
- Brisbane visitors contribute less per person compared to other visitor markets.
- International source markets, although accounting for only 7% of all visitors to Noosa Shire (2019), overall, spend more than domestic day trippers.

Local Tourism Organisation – Tourism Noosa

- Its core purpose is to position Noosa as Australia's most desirable and sustainable tourism destination through promotion and marketing activities.
- Is a not for profit, member-based organisation with around 600 members and is governed by a Board of skills-based and member-elected Directors.
- Tourism Noosa builds industry capability, to help strengthen the visitor experience and provides information to visitors.
- In FY 2021/22, Tourism Noosa spent 34% of its budget on marketing.
- Tourism Noosa collaborates with Visit Sunshine Coast and other industry organisations.

Destination Marketing

- Achieved strong brand equity over many years.
- Focused on attracting value (higher yield) over volume (visitor numbers) markets.
- Campaigns do NOT directly target day trippers in Southeast QLD.
- International marketing – trade engagement with key influencers of travel (wholesale travel companies, inbound travel agents and tourism stakeholders, e.g., Tourism Australia).
- Marketing activity focuses on attracting visitors during low and shoulder seasons and encourages dispersal across the region.

Current and Planned Council Initiatives

- Noosa Council funds Tourism Noosa to undertake destination marketing, industry capability, support key tourism events, deliver a range of environmental sustainability/regeneration programs, and provide visitor information services 7 days a week.
- Implementation of a significant Destination Management Plan to provide the framework for how visitation to the Noosa region can best be managed to ensure positive impact now and into the future.

Community Response - Possible Future Actions

These are examples only

Do Nothing Scenario

- Stop promoting Noosa Shire to all visitors.

Steady State/Current Scenario

- Maintain current level of public funding of tourism marketing.
- Place emphasis on community values and nature-based campaigns.

Aspirational Scenario

- Focus on community values-based messaging (e.g., respect our environment) in future marketing.
- Focus only on marketing tourism businesses that align with shared community values.

Transformative Scenario

- Market Noosa Shire by highlighting values that align to regenerative tourism, community and Kabi Kabi values, which will encourage people to give back, respect people and place and travel responsibly.
- Develop an innovative initiative to attract visitor and philanthropic contributions for environment and community development projects.

Visitor Accommodation

- Noosa Shire has approximately 6,588 houses, units, rooms and caravan/campsites, plus 506 backpacker style beds available on the tourism market, including all STA.
- At 100% capacity, Noosa Shire can accommodate approximately 30,700 visitors per night.
- Noosa Shire has one global standard 5-star luxury branded accommodation property.
- The majority of Noosa Shire accommodation is self-contained dwellings used for short stay – 79%.
- Multiple ownership of strata buildings hampers opportunities for renovation or development

Short Term Accommodation

- Noosa Shire has around 5,200 STA properties, many are in residential-zoned neighbourhoods.
- 86% of STA property owners do not live in Noosa Shire.
- The growth of dwellings used for short-term accommodation is a significant issue for residents, impacting housing supply, housing affordability, residential amenity and sense of community.
- STA accommodation provides 80% of all tourist accommodation for visitors.
- COVID-19 increased the occupancy rates for STA 'whole of dwelling' bookings due to high levels of domestic tourism, a result of international border closures.

Compliance

- Impacts of STA properties on residential amenities are managed through a local law and complaints are dealt with through a 24/7 hotline.
- Lawful STA properties require a local law approval and an ongoing annual renewal fee.
- Over a 12-month period ending February 2023, 600 + complaints were made to the STA hotline. The majority were related to noise.
- Growth in STA properties on residential land will erode housing supply and are therefore no longer permitted in the Low-Density Residential zone.

Current and Planned Council Initiatives

- Transitory accommodation rating introduced for STA.
- Short Stay Letting or Home Hosted Accommodation local law introduced to manage impacts on residential amenity including a code of conduct for guest behaviour.
- Establishment of a 24/7 complaints hotline.
- Local Law application and annual renewal fees introduced.
- Noosa Plan 2020 restricts where STA can occur – STA is an inconsistent use in Low Density Residential zone.
- Short Term Accommodation monitoring report.
- Housing Strategy adopted- recommending STA be an inconsistent use in Medium and High Density Residential and other zones except Tourism zones.
- STA properties were encouraged by Mayor to move into long term rental.
- Noosa Shire Employment Land Review
- Noosa Plan 2020 and continued amendments to improve liveability.

Community Response - Possible Future Actions

These are examples only

Do Nothing Scenario

- No regulation of accommodation sector.

Steady State/Current Scenario

- Continue to monitor and regulate short stays.
- Continue to assist accommodation operators to improve their business marketing.

Aspirational Scenario

- Encourage the dispersal of overnight visitors through increased eco and nature-based accommodation in the hinterland.
- Reduce Short-Term Letting in dwelling houses

Transformative Scenario

- Accommodation operators implement zero emissions and zero waste practices.
- Innovative, sustainable and affordable worker housing delivered in appropriate and central locations.

Visitor Experiences and Services

- Top three iconic locations, voted by consumers:
 - Noosa National Park
 - Noosa Main Beach
 - Noosa River
- Over 1m people visit Noosa National Park Annually
- Noosa Shire has around 600 listed tourism experiences and attractions. Approximately 30% are free limiting the economic impact of visitation.

Other Experiences and Services

- Noosaville has the highest share of all paid experiences and attractions – boats and tour hire (67%), massage (35%), salons/spas (25%).
- Noosa Hinterland has the highest share of free experiences and attractions – Lakes and rivers (76%), natural places of interest (51%) and parks and reserves (47%).
- Noosa Shire has 15 EV charging stations including 3 in Noosa Heads and 5 in Noosa Hinterland. 5 of the stations are public, the rest are situated within resorts/motels.

Food and Beverage

- Noosa Shire has 375 food and beverage providers - 177 restaurants, 95 cafes and coffee shops and 14 breweries. Noosa Heads accounts for 35% of all Food and Beverage options.
- Noosa Heads has the highest share of restaurants (43%). Noosaville has the highest share of cafes and coffee shops (37%). Noosa Hinterland has the highest share of breweries (50%).

Current and Planned Council Initiatives

- Noosa Plan 2020 regulates land uses which helps shape what experiences may/may not be developed across the shire.
- New infrastructure developments should be consistent with Noosa Design Principles.
- Construction of active pedestrian and cycle networks for community and visitor experiences (e.g., Noosa Biosphere Trails, Park Road Boardwalk).
- Partnerships with Tourism Noosa, Chambers of Commerce and business associations help to identify new experiences.
- Preparation of a Destination Management Plan to prioritise the protection and regeneration of Noosa Shire's natural experiences and services.

Community Response - Possible Future Actions

These are examples only

Do Nothing Scenario

- No regulation of new business's

Steady State/Current Scenario

- Develop programs to improve visitor experiences and provide skills training for tourism businesses.
- Continue to ensure new business's meet planning requirements.

Aspirational Scenario

- Reintroduce the Welcome to Noosa customer service program, with input from Kabi Kabi.
- Develop a carrying capacity model to determine best use of tourism infrastructure, experiences and services.

Transformative Scenario

- Noosa Council to advocate for restricted access and a booking system to the Shire's iconic landscapes e.g. Noosa National Park, Noosa North Shore.
- Mandate that all tourism experience and service operators are zero waste and zero emissions.

Iconic Events

- Noosa Shire hosts major tourism events annually, including:
 - Noosa Triathlon
 - Noosa Festival of Surfing
 - Noosa Alive
 - Noosa Enduro
- The genres of events are sports, lifestyle, and arts & culture.
- Traditionally, events have been used as a strategy to bring visitors to the region during off peak and shoulder seasons, outside of Christmas, Easter, and school holidays
- Some new event applications target Noosa Main Beach.
- Noosa Main Beach can host up to seven major tourism and eight community events each year.
- Event road closures can impact some community access.
- Road closures (through major events) impacting residents account for less than 30 hours each year.
- Events are marketed by the event rights holder and in some cases Tourism Noosa.
- Events can impact local amenity and lifestyle.
- Events positively contribute to the economy.
- Events enhance community pride and encourage active lifestyles.

Current and Planned Council Initiatives

- Noosa Council Events Policy regulates tourism events using assessment criteria.
- Where possible community access to public land is prioritised during an event.
- Impacts on community assets are monitored.
- High-use precincts are protected from overuse.
- Events proposed in high-use areas must demonstrate valid locational needs.
- Events employ sustainable practices.
- Council and some event organisers offer free bus transfers at Park and Ride facilities to limit traffic congestion.
- Tourism Noosa allocates part of their funding to support tourism events that align with destination values.

Community Response - Possible Future Actions

These are examples only

Do Nothing Scenario

- Don't support any further signature events.
- Don't limit events on Main Beach.

Steady State/Current Scenario

- Iconic events must align with community and lifestyle values and limit impacts on public land, the environment and amenity.
- Review type, number and location of iconic events to ensure greater alignment with Noosa Shire values and principles.

Aspirational Scenario

- Stricter limits on the amount of time where road closures and event infrastructure may impact community access and movement.
- Events to be more aligned to the brand, e.g., move from competition dominated to cultural/community events.

Transformative Scenario

- Iconic Events must be Zero emissions/carbon neutral.
- Establish an iconic, cultural event experience of international acclaim that is aligned to Noosa Shire's values.

Governance

Noosa Council has a long and proud history of strong Governance and Community Leadership. Noosa as a destination has benefitted greatly from strong and consistent planning and development frameworks and a political willingness to defend these.

Noosa Council governs the Shire around five key themes:

- Environment
- Liveability
- Prosperity
- Future
- Excellence

Roles of Council

- Provider, Funder, Facilitator, Partner, Educator, Advocate, Planner, Regulation, Lobbying and Advocacy to other levels of government.

Tourism

- Noosa Council has a Partnership Agreement with Tourism Noosa that includes key performance indicators. The agreement is reviewed every two years and will be subject to review following completion of the Destination Management Plan.
- Tourism Noosa is the region's peak tourism destination management and marketing organisation.
- Noosa Council has a Partnership Agreement with Tourism Noosa.
- Tourism Noosa's 4-year Destination Strategy and annual business plans are publicly available and developed in collaboration with Noosa Council.

Current and Planned Council Initiatives

- Noosa Plan 2020 – Planning Scheme
- Governance Framework
- Noosa Council Corporate Plan 2023-2028
- Noosa Environment Strategy
- Noosa Social Strategy
- Noosa Shire Economic Development Strategy
- Noosa River Catchment Management Plan
- Destination Management Plan (Under development)
- Noosa Transport Strategy
- Noosa Waste Strategy
- Coastal and Foreshore Management Plan
- Noosa Cultural Plan
- Noosa Housing Strategy
- Your say website

Community Response - Possible Future Actions

These are examples only

Do Nothing Scenario

- Less regulation and more market driven outcomes.

Steady State/Current Scenario

- Govern Noosa Shire in line with current community sentiment and current planned Council initiatives.
- Continue to regulate development in line with community values and the Noosa Plan.

Aspirational Scenario

- Noosa Council is recognised as a leading Council that delivers the best infrastructure and services for the local community.
- Council takes clear and strong leadership through setting the direction and policies to guide the visitor and tourism economy.

Transformative Scenario

- Implement plans to make Noosa Shire a world leading regenerative destination.
- Council's leadership includes using specific tourism policies and values to set goals and boundaries to manage and direct industry development and set the agenda.

