

NOOSA QUARTERLY VISITOR FORECAST

AUTUMN OUTLOOK 2025

TOURISM
NOOSA



INTRODUCTION

Welcome to Tourism Noosa’s seasonal visitor forecast for autumn 2025, providing 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 and in light of recent events that impact our region, such as ex-Tropical Cyclone Alfred and subsequent flooding. Forward bookings in this document are as at Monday 10 March, when some of Noosa’s key markets including Brisbane, Moreton and the Gold Coast were unfortunately experiencing flooding, so it would be expected that further holiday cancellations could ensue.

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 this content, or any insights you’re seeing around changes in visitor activity gleaned from your own business that you feel we should be aware of.

HOT TIP FOR AUTUMN:

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

Visitors call into the Hastings Street centre every day, looking for things to do, and many are seeking last-minute bookings for tours and accommodation. Updating our team helps them keep you in mind when talking with our guests.

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 see our new 2025 Marketing Opportunities Planner visitnoosa.com.au/members/advertising-opportunities. You can also contact members@tourismnoosa.com.au for any other member-related queries.

ACCOMMODATION FORECASTS:

MARCH – MAY 2025

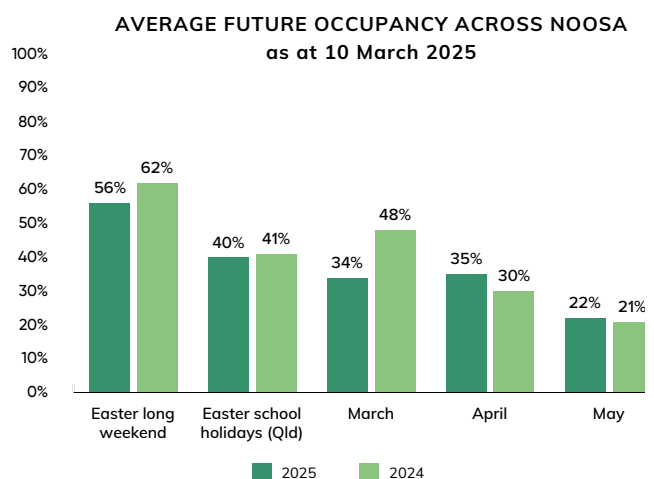
Forward bookings across the Noosa region as at 10 March 2025, compared to bookings for the same time period last year. Please note this is an average of online booking results for all accommodation properties (including short-term accommodation), from budget to premium products across the entire Noosa Shire, including coastal and hinterland areas.

FUTURE OCCUPANCY IN NOOSA SHIRE

Average bookings for autumn 2025 (30%) are slightly behind the same period last year (33%).

Bookings for the Easter long weekend are slightly further behind, currently at 56%, compared to 62% last year.

Note: The Easter long weekend was from 29 March – 1 April last year and is from 18-21 April this year, so this will affect the annual comparison, as well as comparisons for the Easter school holidays and the months of March and April. Specific Easter and holiday dates have been used when comparing between 2024 and 2025, and it would be expected that forward bookings at this time last year would be higher than this year, due to the shorter booking lead time.



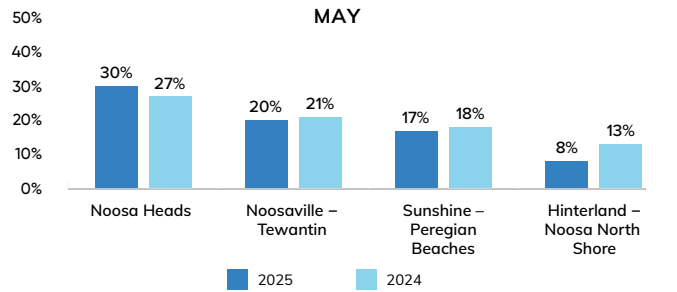
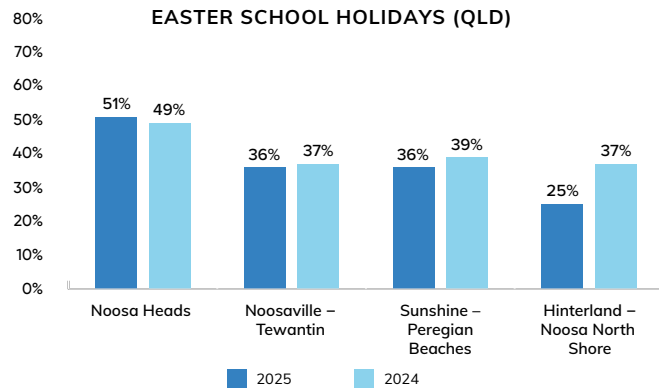
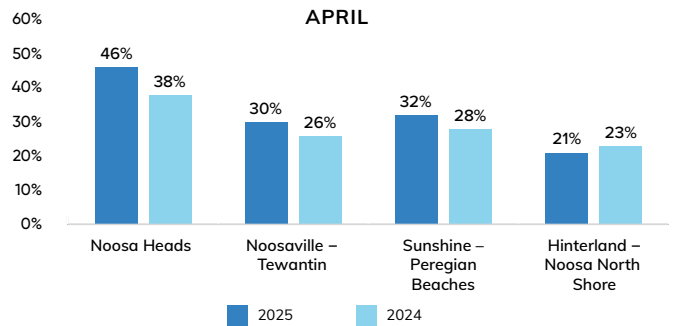
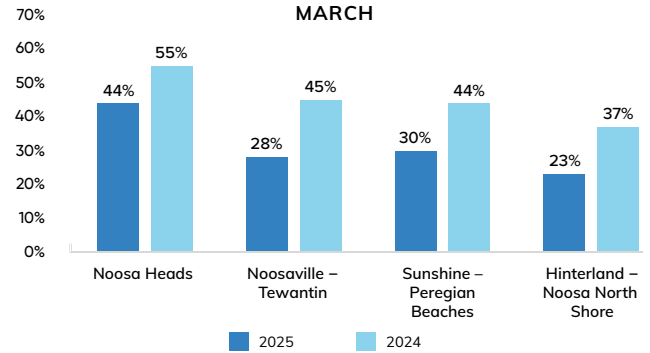
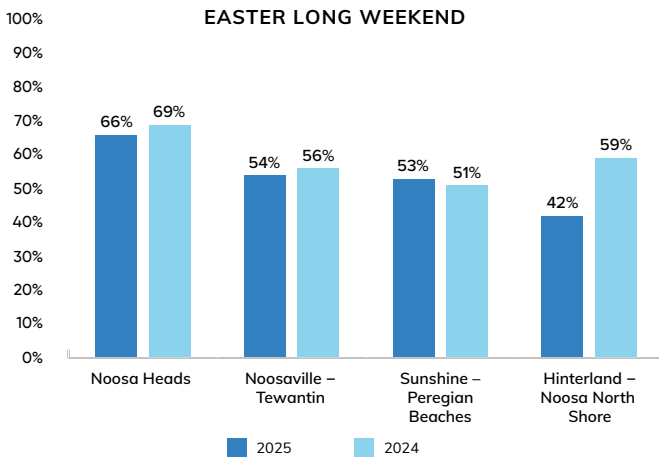
Source: Noosa Travel Insights Hub, Localis, as at 10 March 2025.

FUTURE OCCUPANCY IN NOOSA'S VILLAGES AS AT 10 MARCH

This is an average of results for accommodation properties, from budget to premium products across each of Noosa's precincts. Please note, as stated above, the annual comparisons in March and April are affected by the earlier dates for Easter and school holidays last year.

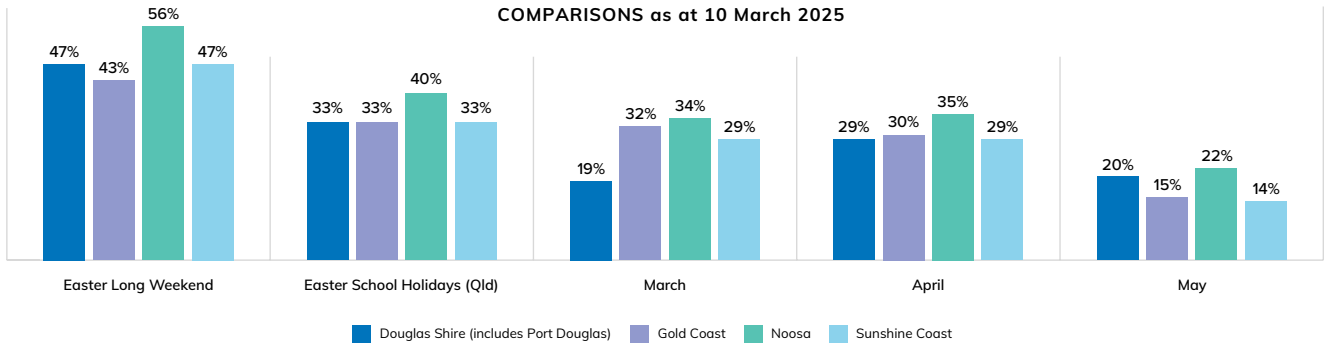
particularly for Noosaville-Tewantin and the Hinterland-Noosa North Shore. Impacts of the significant weather event would likely have affected this, with the closure of access to Noosa North Shore and a flood watch for the Noosa River.

While bookings for Easter have maintained a steady comparison to last year, the remainder of March has fallen further behind,



LGA COMPARISON

FORWARD BOOKINGS – LOCAL GOVERNMENT AREA (LGA) COMPARISONS as at 10 March 2025



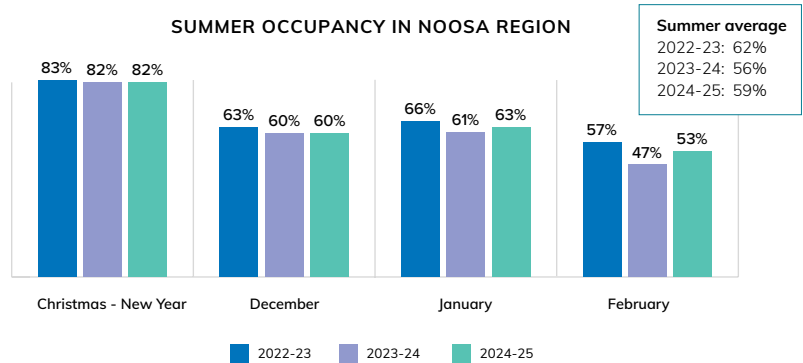
Accommodation bookings for the Noosa region during autumn are about 5% ahead of competitor LGA (Local Government Area) regions in Queensland, particularly for the Easter long weekend.

Source: Noosa Travel Insights Hub, Localis, as at 10 March 2025.

LOOKING BACK

ACCOMMODATION OCCUPANCY SUMMER 2024-25

Accommodation occupancy in the Noosa region over summer was on average about the same as the previous year (59% v 56%), but several percent below the highs of 2022 (record year post-COVID). January this year was slightly stronger than last year and the Christmas – New Year week was the same as previous years.



Source: Noosa Travel Insights Hub, Localis.

VISITORS AND SPEND IN NOOSA : YEAR ENDING SEPT 2024

In the year ending September 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 42% of visitor numbers but only 7% 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.

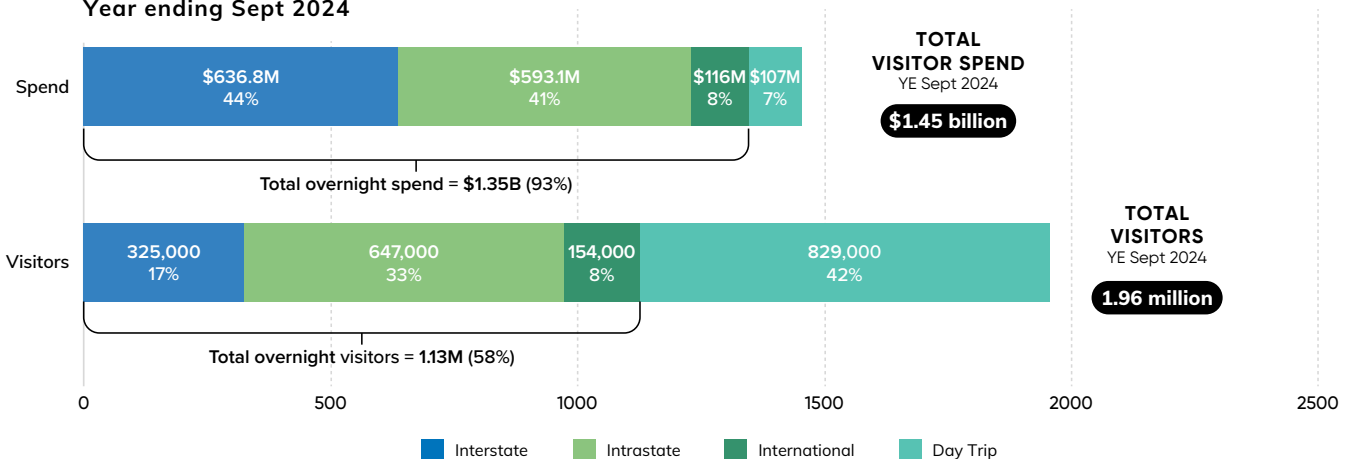
NOOSA SHARE OF QLD VISITOR NIGHTS

Noosa's share of domestic visitor nights in Queensland, including our share from the higher-spending interstate visitors, fell in the year to September 2024, reflecting a decline in interstate visitors to the wider Sunshine Coast (-10.8%) and a decline in interstate visitor nights on the Sunshine Coast (-21%)¹:

	2023	2024
Domestic visitor nights	4%	3.8%
Interstate visitor nights	5.7%	4.6%

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

VISITORS AND SPEND IN NOOSA Year ending Sept 2024



Tourism and Events Queensland's research for the Sunshine Coast² states: "The decline in visitation was largely due to less visitation from New South Wales, down 27.8% to 388,000, Sydney in particular. This reflects in part a decrease in aviation capacity from Sydney directly into the Sunshine Coast." (Bonza Airlines which had provided direct interstate flights to Sunshine Coast Airport ceased trading in June 2024).

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

It is also noted that consumers facing the decision between the desire to travel and cost of living pressures means that visitors are cutting back the length of their trips, and for New South Wales and Victoria in particular, were more likely to travel intrastate than interstate.

SUPPORTING THE NOOSA ECONOMY

VISITOR SPEND

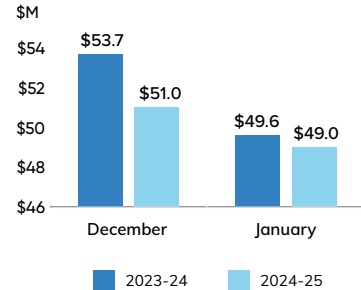
Data below that is sourced from Noosa Travel Insights Hub, Localis is based on Visa card spend in the Noosa Shire at the point of sale (excludes online and pre-visit spend). Visitor spend during December – January was an estimated 27% lower than the previous year. This continued the trend from April last year where visitor spend was lower than in 2023.



Source: Noosa Travel Insights Hub, Localis.

VISA CARD SPEND BY VISITORS IN NOOSA (DEC – JAN)

ESTIMATED MONTHLY VISA CARD VISITOR SPEND IN NOOSA: SUMMER ANNUAL COMPARISON (\$M)

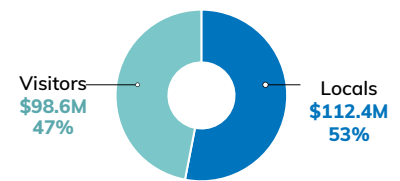


VISITOR AND LOCAL SPEND IN NOOSA

Visitors contributed just under half (47%) of the in-region Visa card spend in Noosa during December 2024 – January 2025. Total spend by visitors and locals (\$211M) was about 30% lower than the previous summer as cost-of-living pressures continue to be felt. Locals' spend decreased more (-33%) than visitors (-27%) in comparison to the previous summer.

In visitor spend, the holiday market has been particularly affected with shorter stays and spend throughout 2024. Tourism and Events Queensland'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.

VISITORS AND LOCALS VISA CARD SPEND IN NOOSA SUMMER 2024-25



Source: Noosa Travel Insights Hub, Localis.

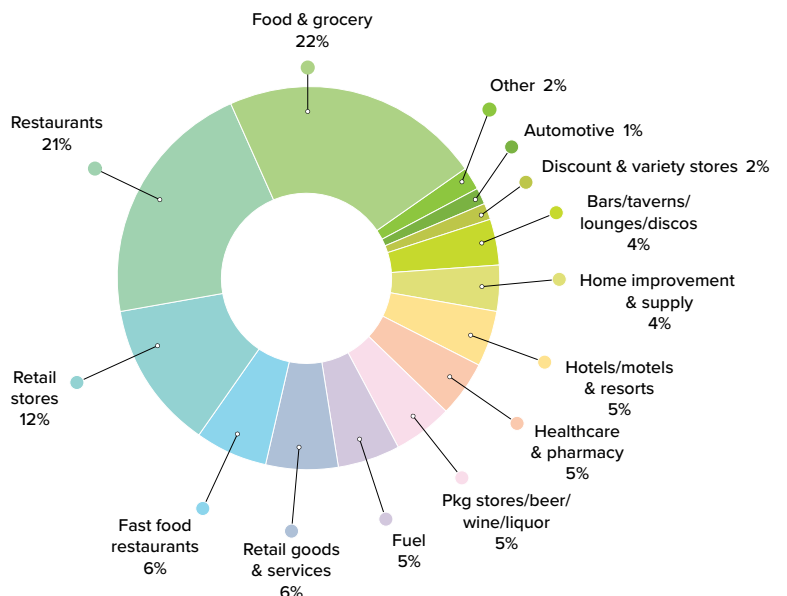
VISITOR SPEND BY CATEGORIES

Restaurants received 21% of in-region Visa card spend by visitors in Noosa during December – January (compared to 23% the previous summer), with food and groceries accounting for a further 22% (same as 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: SUMMER 2024-25



COMPARITIVE VISITOR SPEND IN QLD REGIONS: YEAR ENDING SEPT 2024

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 3.9% 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, Qld Country and Mackay.

^ Includes Capricorn, Bundaberg and Gladstone.

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

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

Brisbane	\$11,009.7M
Gold Coast	\$6,636.3M
Tropical North Queensland	\$4,232.5M
Sunshine Coast (includes Noosa)	\$4,225.2M
Queensland Country	\$1,769.5M
Southern Great Barrier Reef [^]	\$1,690.3M
Whitsundays	\$1,627.3M
Townsville	\$1,176.3M
Outback Qld	\$813.9M
Mackay	\$723.3M
Fraser Coast	\$670.5M

NOOSA
\$1,346 M

SOURCES

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

Tourism Research Australia National and International Visitor Surveys, year ending September 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 Sunshine Coast Regional Snapshot*, year ending September 2024

²*Tourism and Events Queensland Domestic Tourism Snapshot*, year ending September 2024.