Economic Profile

Noosa Shire Council

Final Report

July, 2015

AECgroup
Outcome Driven

Document Control

Job ID:	17887BNE
Job Name:	Noosa Economic Profile
Client:	Noosa Shire Council
Client Contact:	Carolyn Bullen
Project Manager:	Michael Campbell
Email:	michael.campbell@aecgroupltd.com
Telephone:	07 3831 0577
Document Name:	AEC - Noosa Economic Profile Final Report
Last Saved:	27/7/2015 2:48 PM

Version	Date	Reviewed	Approved
Draft Report	29/05/2015		
Draft Report v1.1	10/07/2015	MK	ARP
Draft Report v1.2	13/07/2015	MK	ARP
Final	14/07/2015	MC	
Final a	27/7/15	MC	

Key Point Summary

The Noosa economy is typical of a lifestyle and tourism destination. Like most tourism and lifestyle destinations, much of the economy is geared towards tourism and population driven industry sectors (i.e. retail, accommodation and food services, health care, etc.). Similar to other areas, the local economy is reliant on tourism and population growth to generate economic growth.

The Noosa economy has many inherit challenges including lower levels of population growth (important to drive the economy), an older population that is aging faster than other communities in QLD (which changes the dynamics of the local economy and expenditure patterns – significant again due to Noosa's economic structure) and the over reliance on tourism and population driven industries (which means susceptibility to future economic shocks and a lack of economic sustainability and resilience). The current economic structure translates through to lower levels of full-time employment, which means that local wages and incomes are below the State average.

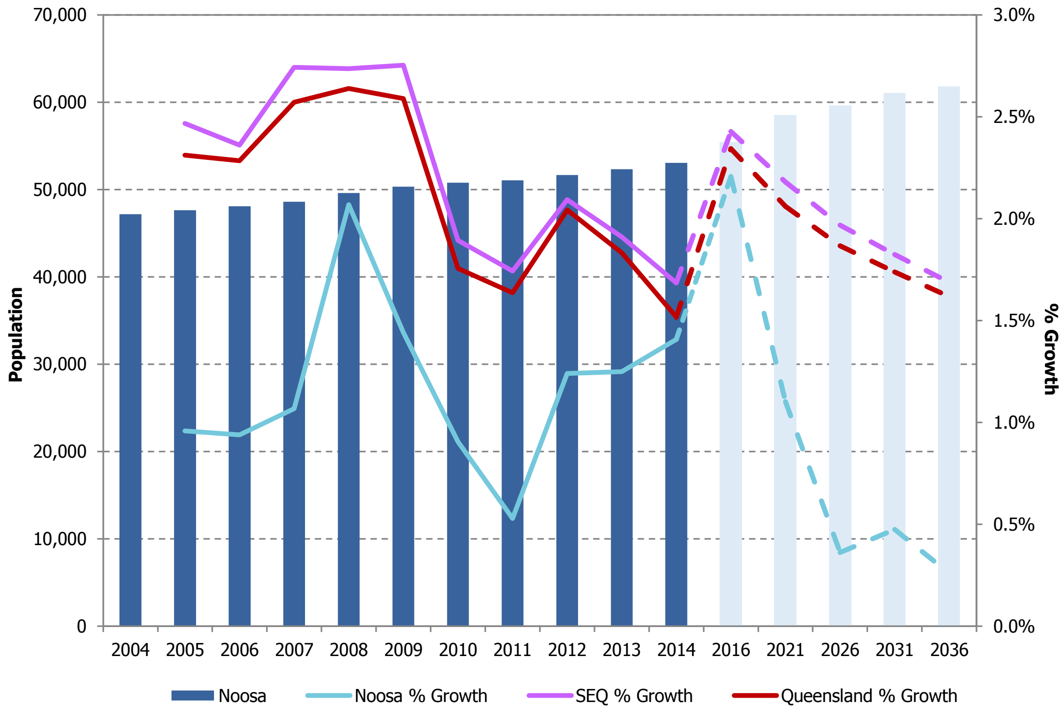
Noosa has a strong and significant brand and image, which probably acts as one of the area's strongest competitive advantages. Ways must be found to leverage this brand and the amenity and lifestyle of the area to leverage other non-tourism opportunities in the economy. By doing so, the economy will become more diverse, create higher levels of value and present new and varied opportunities for new job growth.

Important Trends

The following important trends will greatly impact the future economic development of Noosa:

- **Population growth**: Population growth in Noosa has accelerated for the first time in many years, growing 1.4% in 2014 (compared to 1.2% the previous two years). At the same time population growth across SEQ and QLD has slowed. Given the importance of population growth to the Noosa economy, this is a noticeable and important change.

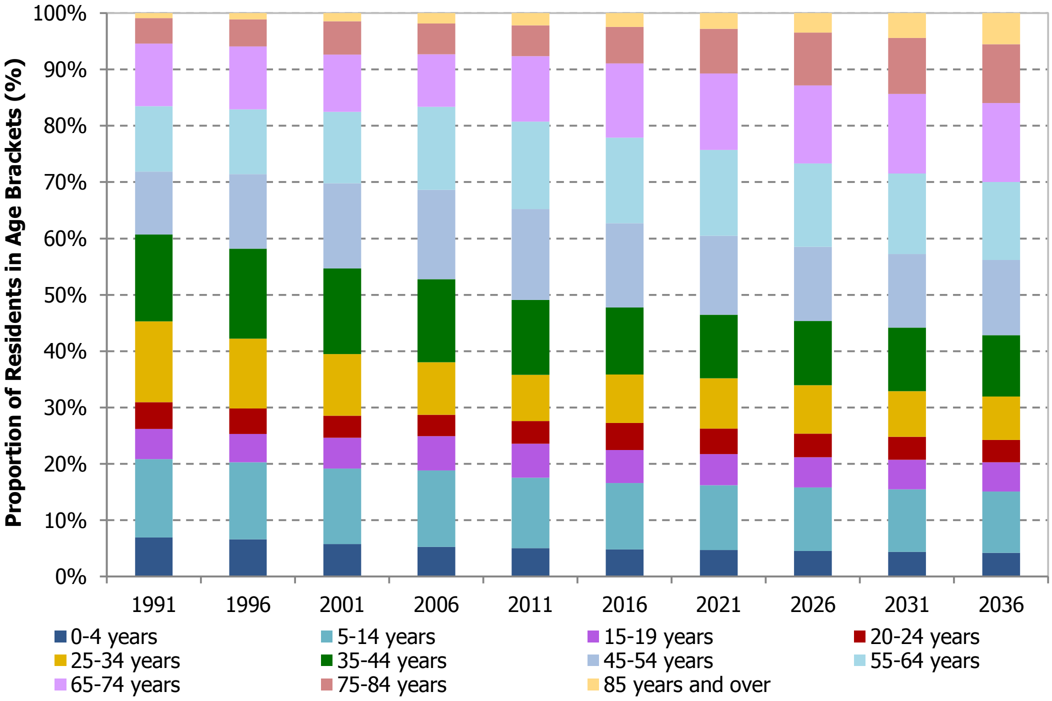
Figure KPS.1: Noosa LGA Historical and Projected Population



Source: ABS (2015a), QGSO (2015)

- **Aging Population**: Noosa's population is aging, quickly. An aging population not only means that residents are leaving the workforce (and producing less in economic terms), but at the same time there will be increases in demand for a range of goods and services, including aged care, health care and many related industries. This demographic shift has numerous implications including that the economy must produce more value with fewer employees. At the same time, there are net declines in younger residents, which will have an impact on the economy as young families are big spenders in the economy and utilise a variety of services and infrastructure.

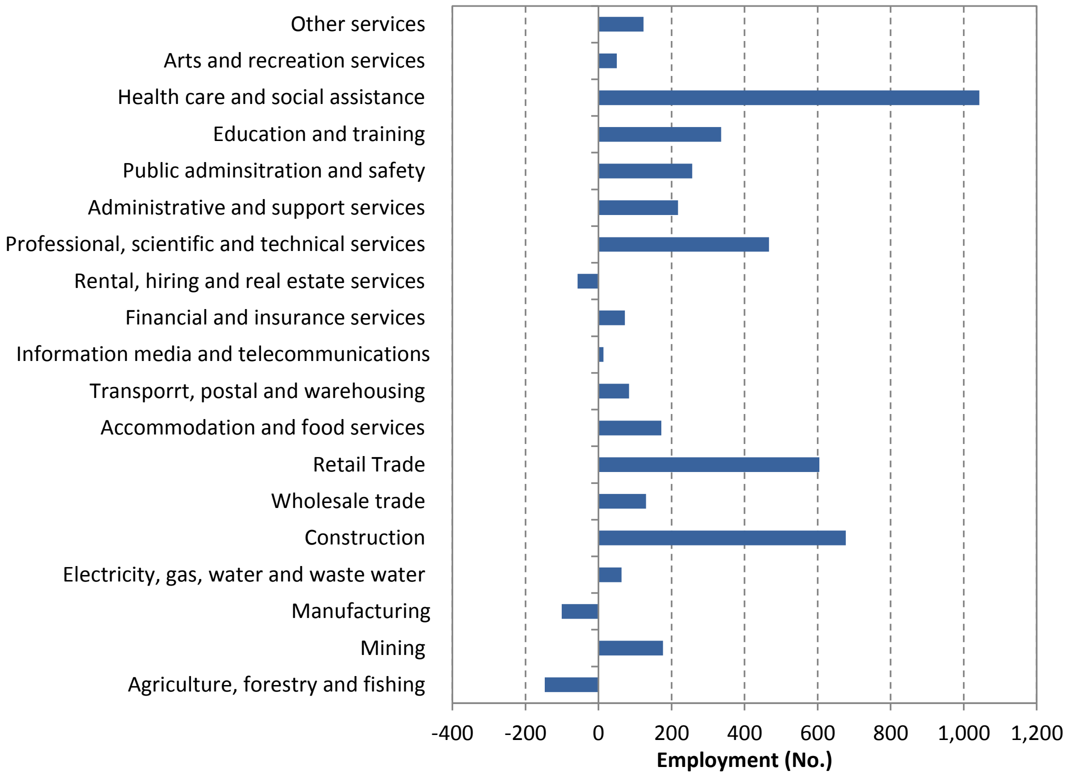
Figure KPS.2: Residents by Age Bracket, Noosa Shire LGA, 1991-2036



Source: Noosa Shire Council (unpublished)

- **Employment Trends**: Various trends in employment structure are likely to continue. Growth in retail trade and accommodation and food services is indicative of the strong local tourism industry and the job losses in other areas such as construction and manufacturing. Growth in healthcare is likely a function of the aging population as well as further advances in health related areas (which continues to generate new jobs). The significant growth in healthcare is a national trend and is likely to continue. The growth in professional, technical services as well as administrative services may signal early growth of new industries that can make a relatively high value-added contribution to the economy. These trends are likely to continue to impact the future economy.

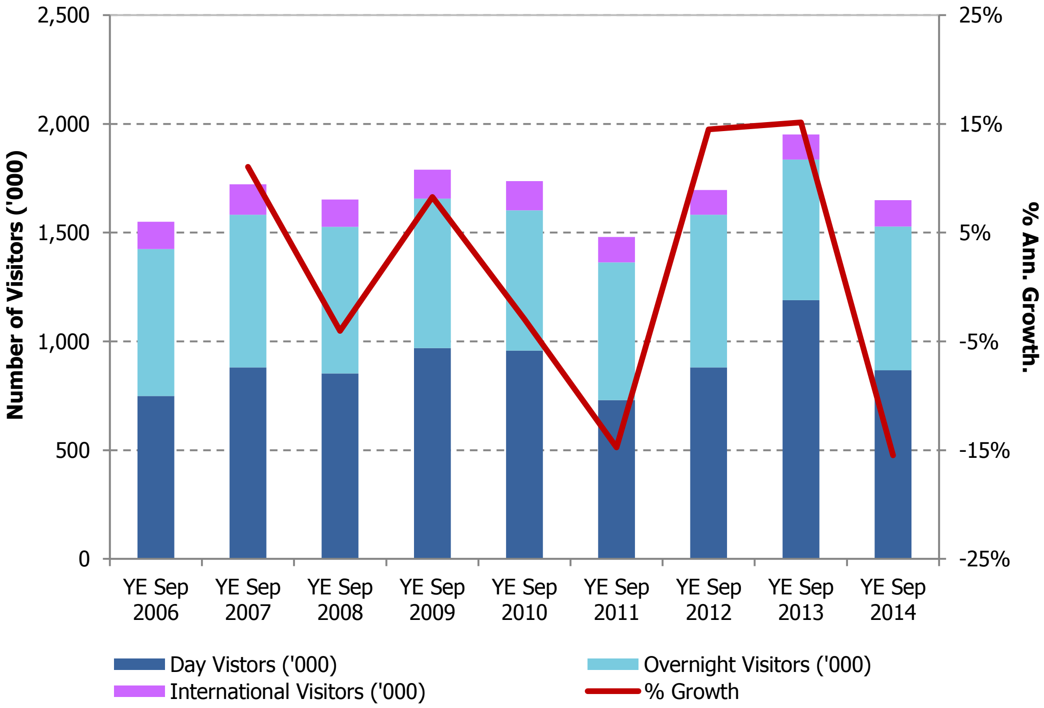
Figure KPS.3: Change in Employment, Noosa Shire, 2001-11



Source: ABS (2001, 2011)

- **Tourism**: As tourism is an important industry in Noosa, trends in tourism are important. After two years of impressive growth (15% year over year), overall visitation to Noosa dropped 15%. Fortunately, the majority of the loss was in the day trip market (which provides the least amount of economic value or yield). Overnight and international visitation both grew, which is encouraging for the future. Even with the decline in visitation, tourism still injected $600 million into the local economy.

Figure KPS.4: Tourism Visitation, Noosa Shire LGA, 2006 to 2014



Source: TRA (2014c)

Data Analysis Summary

- Since 2004, **Noosa's population has grown at a slower rate** (average annual rate of 1.2%) than SEQ (average annual rate of 2.3%) and QLD (average annual rate of 2.1%). In 2014, the gap narrowed significantly, with population growth in Noosa increasing by 1.4% and population growth slowing in SEQ (1.7%) and QLD (1.5%).

Population Growth is Important to the Economy

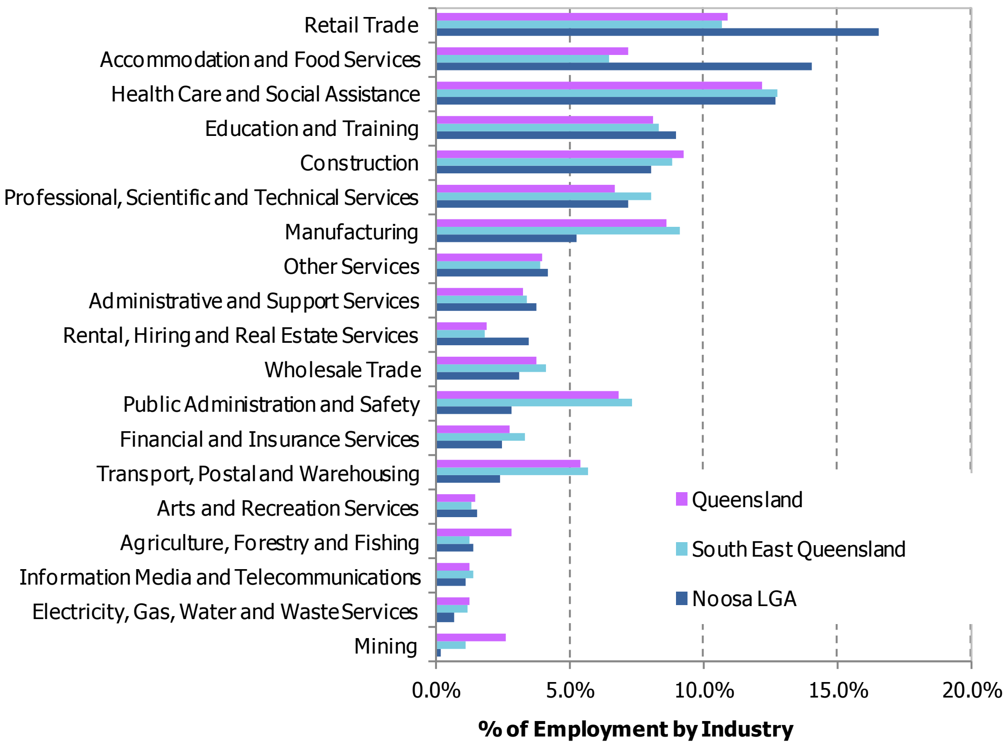
The population directly drives roughly one-third of the economy, so the growth of the population can have a significant impact on the economy, particularly for a community like Noosa, where the economic structure heavily revolves around population driven sectors.

- **Noosa's population is older than SEQ and QLD and aging quickly**. The median age of Noosa's residents was 45.9 years in 2011. This is 7.8 years higher than the median age of SEQ Region residents (38.1 years) and 9.9 years higher than the median age of residents of the State (36.0 years). Since 1991, Noosa has seen a significant increase in the proportion of residents aged 45 years and over. Residents aged 45 years and over accounted for 39.3% of the population in 1991, 45.3% in 2001 and 50.9% in 2011. Residents aged 65 years and over has grown from 16.5% of the population in 1991 to 19.3% in 2011. Looking forward to 2036, a projected 57.2% of all residents in the Shire will be aged 45 years and older, with almost a third of all residents forecast to be aged 65 years and over.
- **Noosa has lower household and individual incomes than SEQ and QLD**. In 2011, the Shire reported a median household income almost $200 below SEQ and almost $300 below the State ($953.5, $1,150.7 and $1,235.0 per week respectively). Between 2006 and 2011, Noosa's household income grew at an average annual rate of 2.8%, which is below the rate of annual inflation (3.2%) during this time. Conversely, Noosa's individual income levels grew by an average annual rate of 3.8% during this time.
- **Noosa's economic structure is geared towards population driven industry sectors and tourism**.
    - The top five **employment sectors in Noosa** (which provide 60% of all local jobs) are:
        - Retail trade (largest employment sector, 16% of total) – 50% higher than the Australian average
        - Accommodation and food services (14% of total) – double the Australian average
        - Health care and social assistance (12% of total)
        - Education and training (9% of total)
        - Construction (8% of total)
    - The top five **GRP sectors** in Noosa (which make up 45% of the economy) are:
        - Construction (13% of total)
        - Health care and social assistance (largest GRP sector, 11% of total) – 60% higher than the Australian average
        - Retail trade (11% of total) – over 50% more than the Australian average
        - Financial and insurance services (9% of total)
        - Rental, hiring and real estate services (7% of total)
    - **The top five employment sectors make up over 60% of total jobs, but only deliver 38% of the value of the economy (GRP).**

Economic Reliance

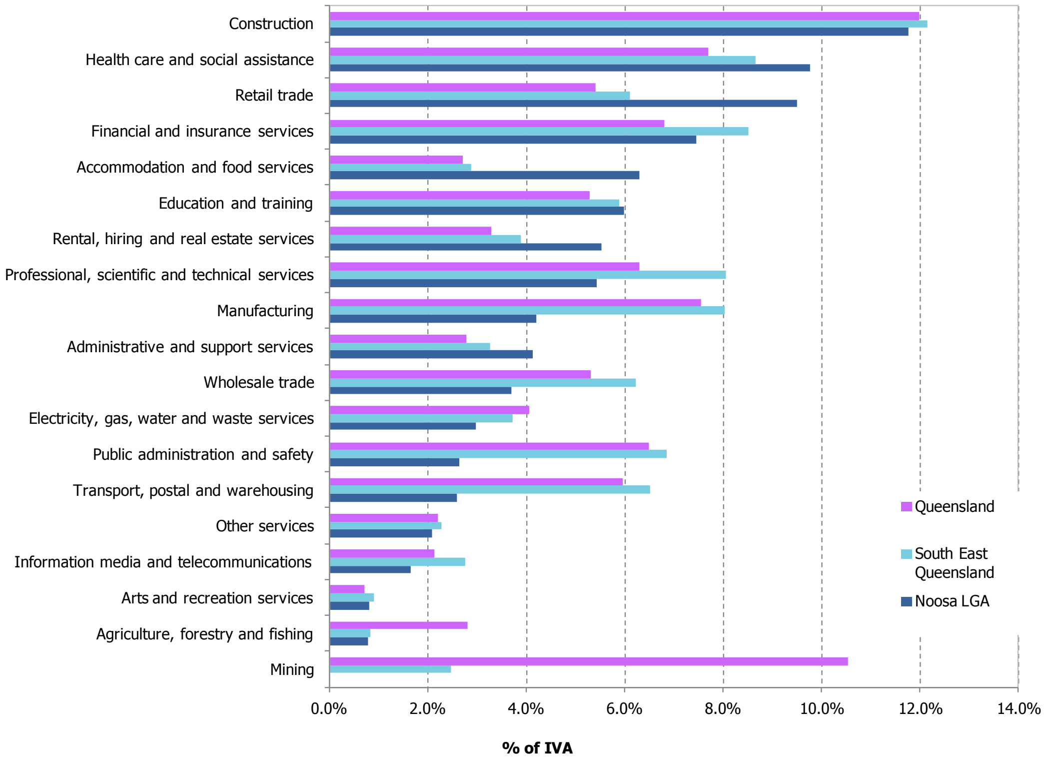
The economic structure of Noosa is based on tourism and population growth. The health of the local economy will be reliant upon future population growth and growth in the local tourism sector. As these two critical drivers change, so too will the economy of Noosa.

Figure KPS.5: Employment by Industry, 2011



Note: Place of work.
Source: ABS (2011)

Figure KPS.6: Industry Contribution to the Economy, 2012-13



Note: Figures represent Industry Value Added.
Source: AEC

- **Given Noosa's economic structure and underlying drivers, it is not surprising the fastest growing sectors of the economy are health care, retail and construction**. Between 2001 and 2011, these three sectors alone were responsible for over half of the overall employment increase during this time.

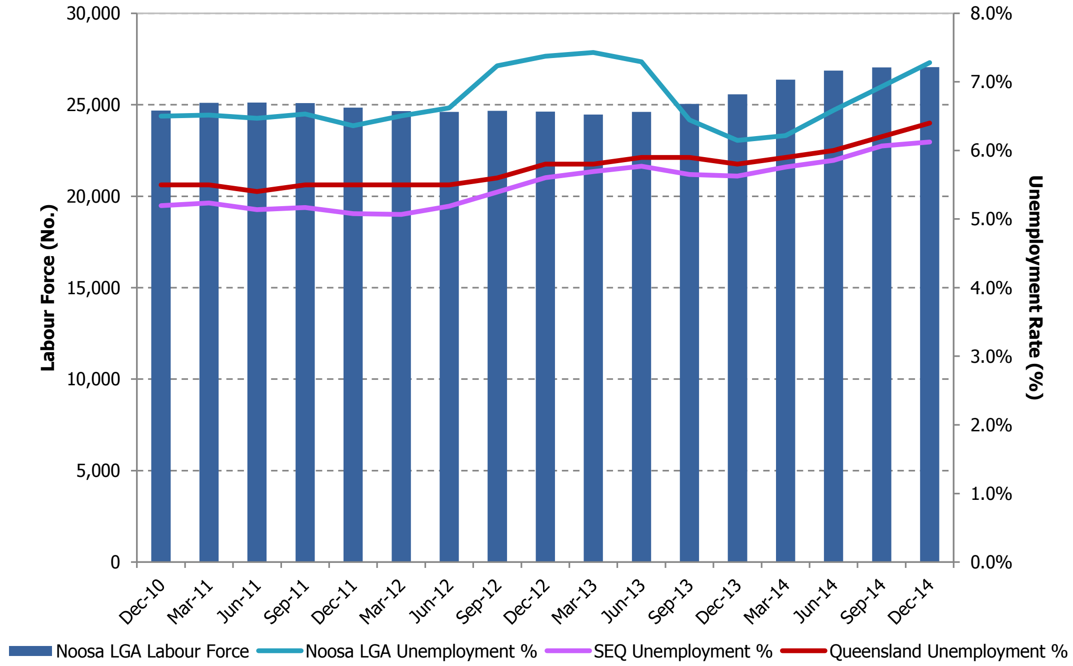
Economic Change and Growth

The economy is influenced by a multitude of factors. All of these factors are driving structural and cyclical changes to the economy. The structural changes are likely to continue, which will mean that many of the changes witnessed over the last decade are likely to continue. Employment growth in health care, retail, education and other services is likely to continue, while decreases in industrial activities are also likely to continue. At the same time, the change in the value added contribution of these sectors is also likely to continue to change, which would see finance and professional business services continue to grow, as well as traditional sectors like industry, agriculture and mining.

The important task is to identify the relevant industry trends locally, regionally, nationally and globally and to identify their potential future impact on Noosa.

- **Unemployment in Noosa has been consistently higher than SEQ and the State**. Maintaining a higher unemployment rate is not unusual for tourism areas that possess a high quality of life. Additionally, SEQ and State unemployment rates have been rising over the last five quarters (albeit not as fast as Noosa). For Noosa, much of the recent increase in unemployment is due not to jobs losses but to growth in the labour force.

Figure KPS.7: Noosa LGA Unemployment and Labour Force



Source: QGSO (2015)

- **Just like Australia, the Noosa economy is made up of small businesses**. 64% of businesses in Noosa are sole proprietorships (i.e. they do not employ anyone outside of the business owner, which is slightly higher than the Australian average (61%). 99% of all businesses in Noosa employ less than 20 people (compared with 98% at the national level). The importance in the context of Noosa is that there are only 112 businesses that employ 20 people or more (only 12 that employ 200 or more).
- **Houses in Noosa are more expensive than in other parts of the State**. In 2014, the median house price in Noosa was $481,410, while in the State it was $405,000. Since 2001, the median house price in Noosa has always been higher than the State, however, the difference in the median house price between Noosa and the State in 2014 ($76,410) was at its lowest in 12 years. Median house prices in Noosa have risen by an estimated annual average of 7.0% between 2001 and 2014. This is slightly lower than the State where the median house price was estimated to have grown by 8.2% annually on average over the same period. The housing price differential is likely a function of the high levels of amenity in Noosa (for tourism and lifestyle).
- **Rent in Noosa is higher than in SEQ and QLD, while mortgage repayments are lower**. The median monthly rent in Noosa is $1,443 compared to SEQ ($1,283) and QLD ($1,300). The median monthly mortgage repayment in Noosa is $1,770 compared to SEQ ($1,794) and QLD ($1,850).
- **The average value of residential approvals in Noosa are 30% higher than SEQ and QLD**. Noosa's average value per residential approval was $371,518 compared to $280,458 in SEQ and $283,065 in QLD.

- **Noosa has seen a dramatic reversal of trends in residential building approvals**. Since 2006-07, there has been a dramatic and consistent decline in the number of and value of residential building approvals. In 2014, the number of residential building approvals almost doubled and the value of building approvals increased by 30%. The change could be influenced by the increase in population growth experienced in 2014, which would have driven a demand for dwellings and the ongoing increase in residential prices. Increases in local building activity will greatly benefit the local economy.

Table of Contents

DOCUMENT CONTROL I

KEY POINT SUMMARY II

TABLE OF CONTENTS XI

1. INTRODUCTION 1

1.1 Background 1
1.2 Purpose of Report 2

2. POPULATION 3

2.1 Estimated Resident Population 3
2.2 Population by Age and Sex 5
2.3 Median Age 6
2.4 Population Churn 6

3. ECONOMIC 7

3.1 Gross Regional Product 7
3.2 Industry Value Added 8
3.3 GRP Per Employee 9
3.4 Incomes 10
3.5 Business Counts by Employment Size 13
3.6 Business Counts by Turnover Range 15
3.7 Cluster Maps 16

4. PROPERTY MARKET 19

4.1 Median House Prices 19
4.2 Mortgage Payments and Rent 19
4.3 Residential Building Approvals 21
4.4 Non-Residential Building Value 22

5. HOUSEHOLDS 23

5.1 Household and Personal Income 23
5.2 Household Size 24
5.3 Additional Dwellings Required to Service Population Growth 24

6. LABOUR FORCE 26

6.1 Unemployment and Labour Force 26
6.2 Youth Unemployment 27
6.3 Employment by Industry by Place of Usual Residence 28
6.4 Employment by Industry by Place of Work 29
6.5 Employment by Occupation by Place of Usual Residence 32
6.6 Employment by Occupation by Place of Work 33
6.7 Education 33

7. TOURISM 40

7.1 Visitation 40
7.2 Expenditure 41

REFERENCES 43

APPENDIX A: BUSINESSES BY INDUSTRY DIVISION AND EMPLOYMENT SIZE RANGES 44

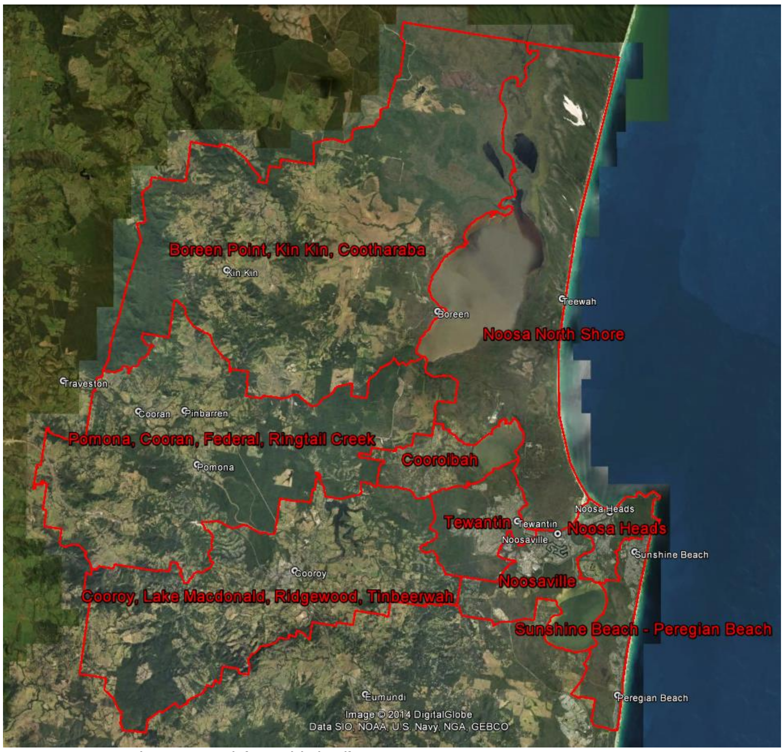
1. Introduction

1.1 Background

The Noosa Council (Council) is a newly re-established Council following its de-amalgamation from the Sunshine Coast Regional Council on 1 January 2014. For the first time in over five years, the Noosa Shire Local Government Area (the Shire) is again governed exclusively by a local Council with local focus on planning social and physical infrastructure, economic development, community capacity building, housing and land use planning.

To inform a range of plans, Council have engaged AEC Group Pty Ltd (AEC) to undertake a baseline assessment of various socio-economic indicators. These indicators will provide a consistent set of data for various departments within Council, allowing a comparison of the Shire and benchmarking against the broader South East Queensland (SEQ) Region and the State. Ultimately, interpretation and analysis of key findings will inform Council on key trends, critical issues as well as opportunities for future growth.

Figure 1.1: Map of Noosa and Key Localities



Source: Noosa Shire Council (unpublished)

At the broader geographic level, the Noosa Shire will be benchmarked against the SEQ Region. The SEQ Region refers to the combination 11 LGAs covering approximately 36,123.1 square kilometres and inclusive of a population of over 3.2 million residents (2013). For the purposes of this report, the SEQ Region comprises of the following LGAs:

- Brisbane (C)
- Gold Coast (C)
- Ipswich (C)
- Lockyer Valley (R)
- Logan (C)
- Moreton Bay (R)
- Redland (C)
- Scenic Rim (R)

- Somerset (R)
- Sunshine Coast (R)
- Toowoomba (R).

For comparison purposes, this report also presents data for the State of Queensland.

Where data for the Shire is not available at the Statistical Area 1 (SA1) level, this document will report at the Statistical Area 2 (SA2) level. The SA2 localities are as follows:

- Noosa Hinterland
- Noosaville
- Tewantin
- Peregian
- Sunshine Beach
- Noosa Heads.

Figure 1.2: Map of SA2s in Noosa Shire

Source: Google Earth (2015)

1.2 Purpose of Report

The purpose of this report is to provide an economic profile and inform the development of a local economic plan for the Shire. This report provides a comprehensive update of economics statistics and comparative data which will form the basis for the local economic plan. This report is a comprehensive and accessible profile document which can be used by both the broader community and Council.

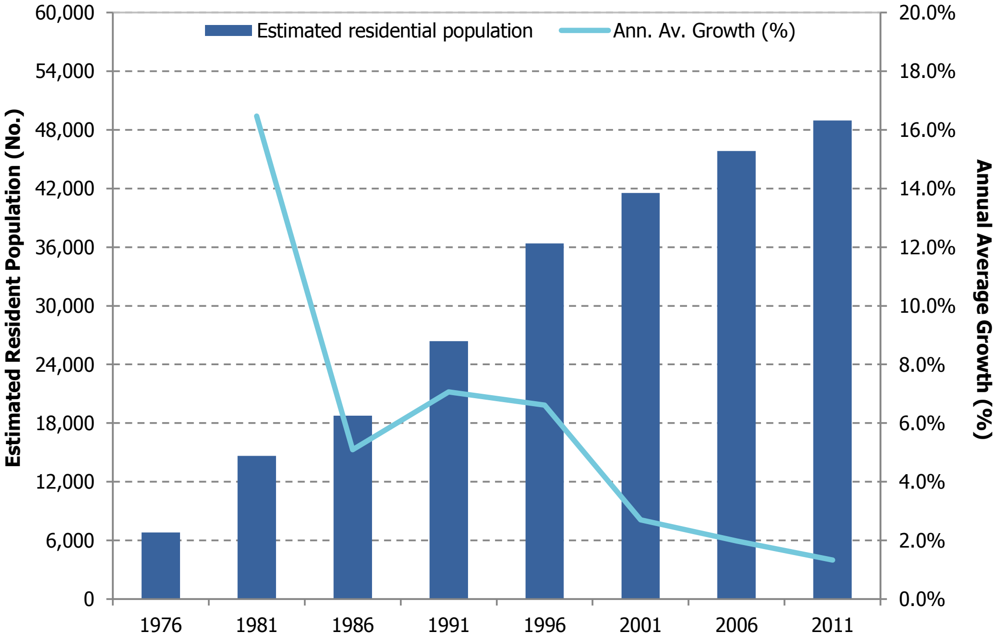
2. Population

2.1 Estimated Resident Population

2.1.1 Long Term Population Growth

- Growth in the Shire's estimated resident population has generally trended downwards since the 1980's. Historically, average annual population growth rates in the Shire ranged between 16.5% and 5.1% in the period between 1981 and 1996. More recently this growth rate has slowed considerably to 1.3% between 2006 and 2011.

Figure 2.1: Estimated Resident Population, Noosa Shire LGA, 1976-2011

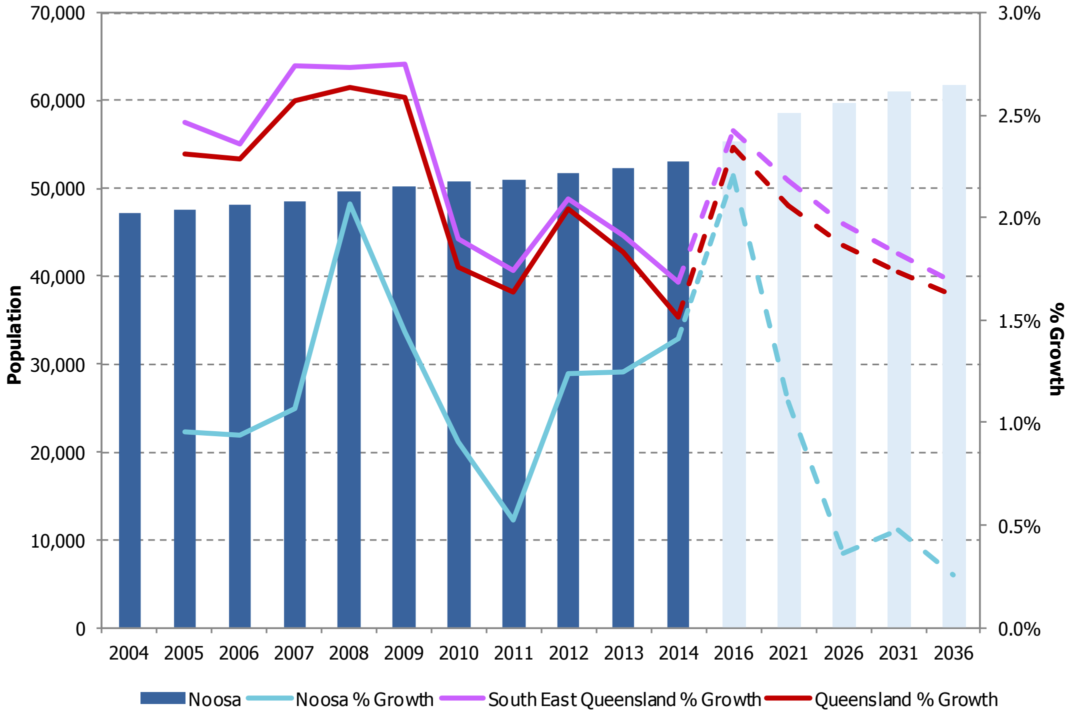


Source: Noosa Shire Council (2014a).

2.1.2 Historical and Forecast Growth

- Population growth in Noosa Shire has averaged 1.2% per annum since 2004 compared to 2.2% per annum for the SEQ Region and 2.1% for Queensland as a whole.
- Forecast population growth is expected to average 0.7% per annum in Noosa Shire, reaching approximately 62,000 persons by 2036. This compares to forecast growth of 2.0% per annum for SEQ and 1.9% per annum for Queensland as a whole.

Figure 2.2: Noosa LGA Historical and Projected Population

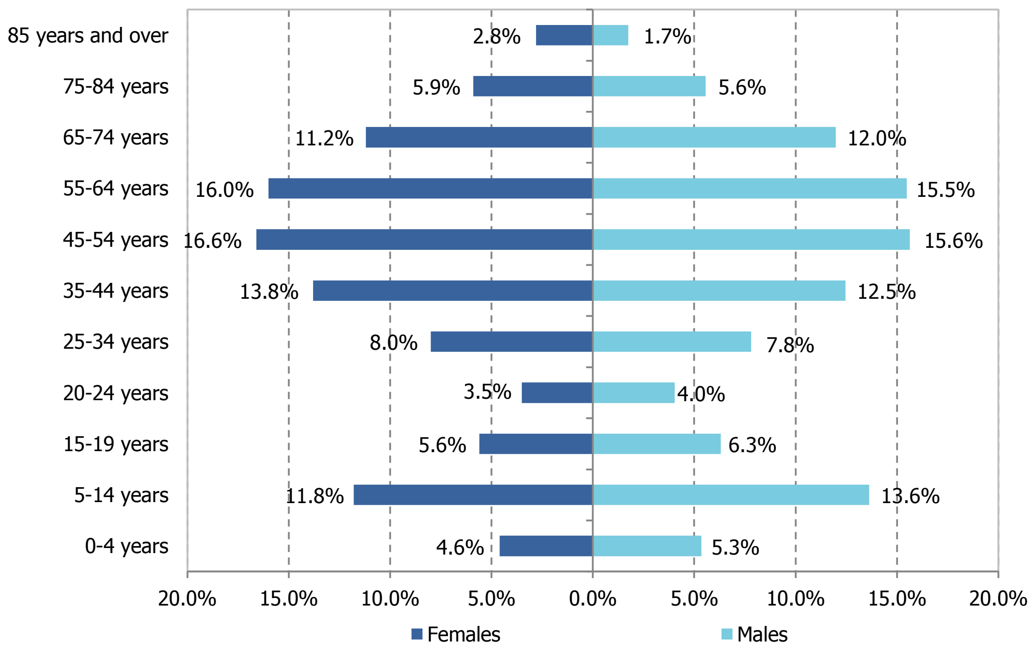


Source: ABS (2015a), QGSO (2015)

2.2 Population by Age and Sex

- Figure 2.3 shows in 2011, the age by sex breakdown in Noosa shows that the greatest difference between males and females within the Shire occurs for the 5-14 year age group (11.8% and 13.6% of the Shire's total population respectively). That is, there are 258 more males aged between 5-14 years than there are females of the same age group in the Shire.
- Another notable difference between males and females occurs for the 85+ year age group (2.8% and 1.7% of the Shire's total population respectively). That is, there are 302 more females aged 85+ years than there are males of the same age group in the Shire.

Figure 2.3: Age by Sex, Noosa Shire, 2011

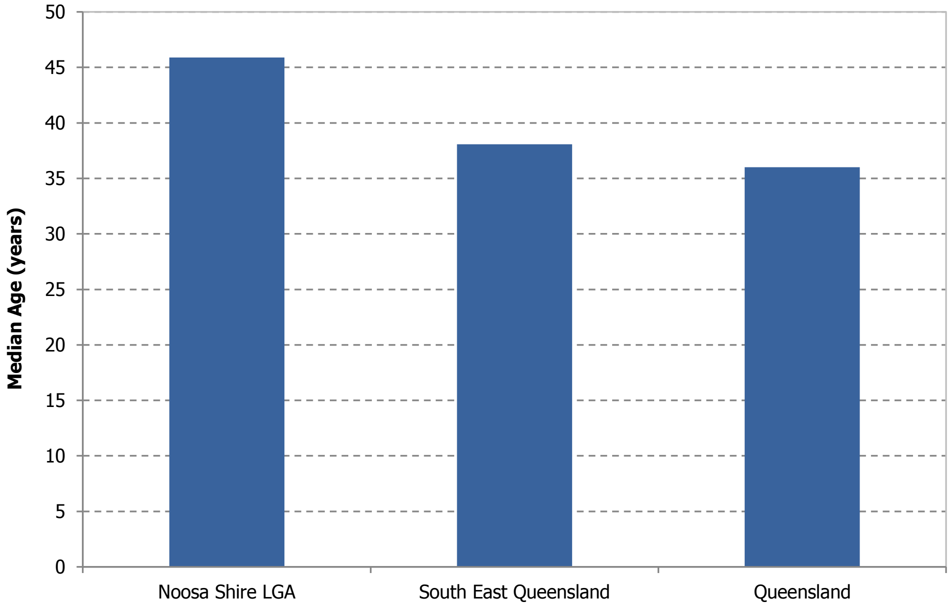


Source: ABS (2011)

2.3 Median Age

- In 2011, the median age in the Shire was 46 years compare to 38 and 36 years in SEQ and Queensland respectively, as shown in Figure 2.4 (ABS, 2011). This shows the older population of people in the Shire mainly due to its popularity as a retirement area.

Figure 2.4: Median Age, Broader Region, 2011



Source: ABS (2011)

2.4 Population Churn

- Table 2.1 shows the population churn within the Shire and reflects that 61.6% of residents in 2011 were residents in the Shire in 2006.
- 23.9% of the residents in the Shire lived elsewhere in Queensland in 2006.
- 4.4% of the residents in the Shire had lived overseas in 2006, showing the international attraction of the Shire as a destination to live.

Table 2.1: Place of Usual Residence Five Years Ago

Place of Usual Residence Five Years Ago	% of Noosa LGA Population
Within Noosa LGA	61.6%
Elsewhere in Queensland	23.9%
Overseas	4.4%
New South Wales	2.6%
Victoria	0.7%
Western Australia	0.8%
South Australia	0.2%
Northern Territory	0.3%
Australian Capital Territory	0.3%
Tasmania	5.2%
Total	**100.0%**

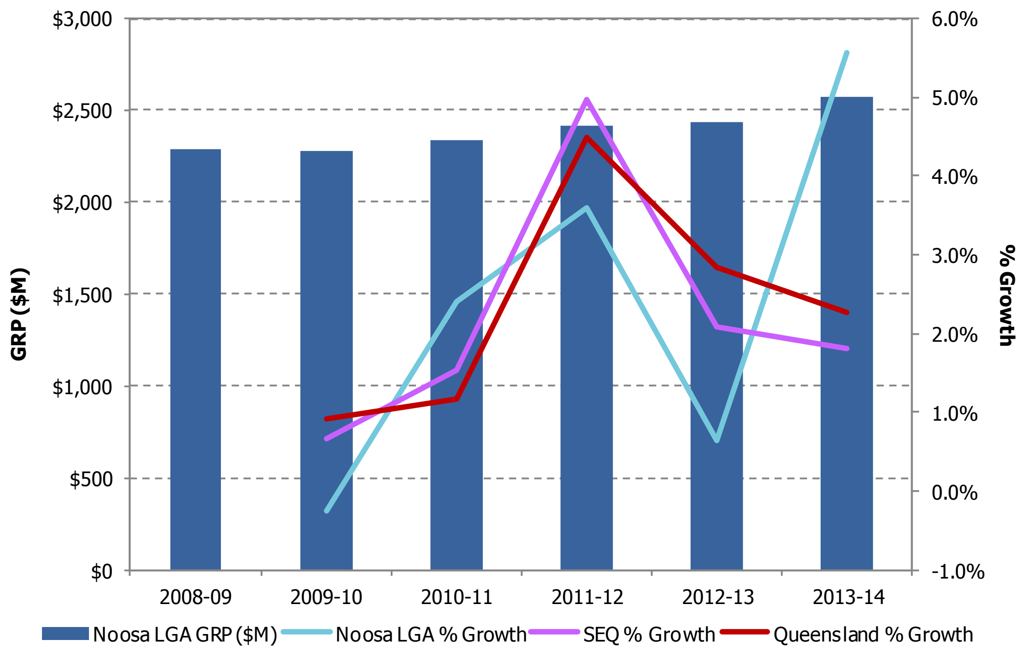
Source: ABS (2011)

3. Economic

3.1 Gross Regional Product

- Gross Regional Product (GRP) in Noosa Shire was just under $2.6 billion in 2013-14.
- Growth of GRP in Noosa Shire over 2013-14 was 5.6%, compared to 1.8% and 2.3% for the SEQ Region and State respectively.
- Over the last five years GRP growth in Noosa Shire has averaged 2.4% per annum compared to 2.2% per annum for SEQ and 2.1% for Queensland as a whole.

Figure 3.1: Noosa Shire Historical GRP and Growth Rate



Source: AEC (unpublished)

3.2 Industry Value Added

- Table 3.1 and Figure 3.2Figure 3.1 show the three main industries in Noosa Shire by Industry Value Added (IVA) are construction ($282.9 million, 13.5% of IVA), health care and social assistance ($234.5 million, 11.2% of IVA), and retail trade ($228.0 million, 10.8%).
- This reflects the older population in Noosa Shire and the industry focus on health care, tourism, and population driven industry sectors.

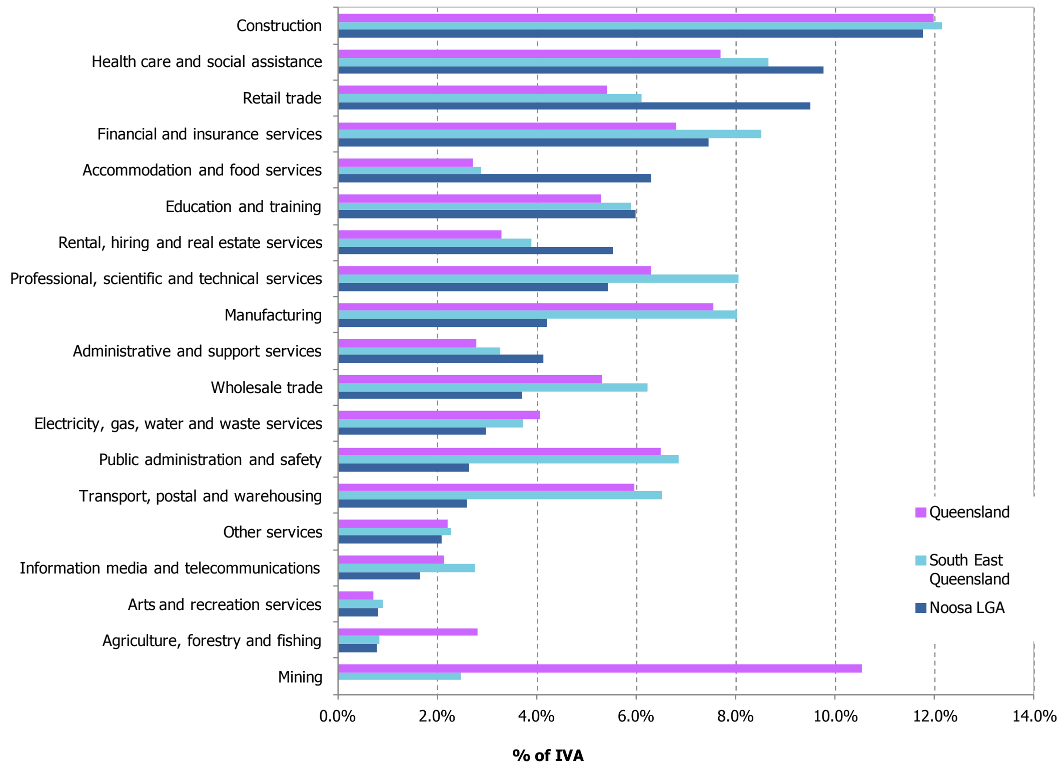
Table 3.1: Noosa Shire IVA (2013-14)

Industry	IVA ($M)	% of IVA
Construction	$282.9	13.5%
Health care and social assistance	$234.5	11.2%
Retail trade	$228.0	10.8%
Financial and insurance services	$178.9	8.5%
Accommodation and food services	$151.1	7.2%
Education and training	$143.8	6.8%
Rental, hiring and real estate services	$133.0	6.3%
Professional, scientific and technical services	$130.7	6.2%
Manufacturing	$100.7	4.8%
Administrative and support services	$99.5	4.7%
Wholesale trade	$88.6	4.2%
Electricity, gas, water and waste services	$71.6	3.4%
Public administration and safety	$63.3	3.0%
Transport, postal and warehousing	$62.1	3.0%
Other services	$49.8	2.4%
Information media and telecommunications	$39.4	1.9%
Arts and recreation services	$19.5	0.9%
Agriculture, forestry and fishing	$19.0	0.9%
Mining	$5.4	0.3%
Ownership of Dwellings	*$305.9*	*n.a.*
Gross Sector Value Add	**$2,407.9**	**n.a.**
Taxes Less Subsidies	*$162.0*	*n.a.*
Gross Regional Product	**$2,569.9**	**n.a.**

Source: AEC (unpublished)

- Noosa Shire has a considerably larger share of industry value add compared to the SEQ Region and State for health care and social assistance, retail trade, accommodation and food services, and rental, hiring and real estate services
- Noosa Shire has a considerably smaller percentage share of industry value add compared to the region and state for mining, transport, postal and warehousing, public administration and safety and manufacturing.

Figure 3.2: Noosa Shire IVA Breakdown (2013-14)



Source: AEC (unpublished)

3.3 GRP Per Employee

- The highest GRP per employee in Noosa Shire was generated by the electricity, gas, water and waste services industry ($429,461 per employee), followed by financial and insurance services ($291,199 per employee), and rental, hiring and real estate services ($151,638 per employee).
- Major Noosa Shire industries generating low GRP per employee include retail trade ($54,806 per employee) and accommodation and food services ($42,788 per employee).

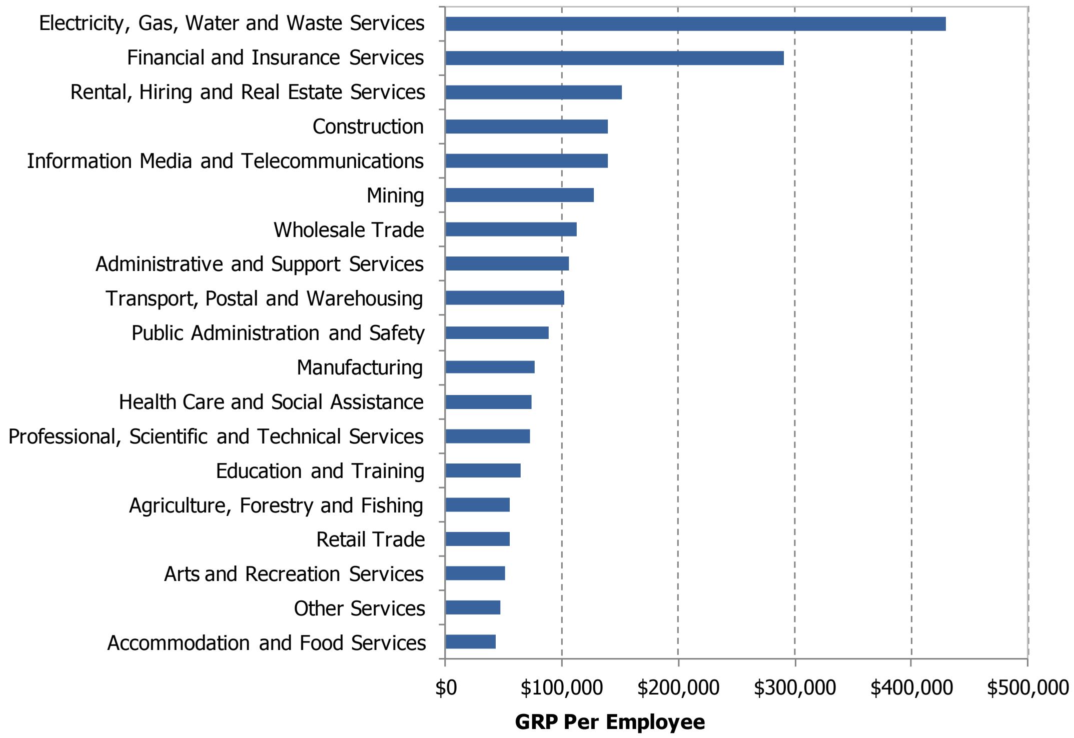
Table 3.2: GRP Per Employee (2013-14)

Industry Sector	GRP Per Employee
Electricity, Gas, Water and Waste Services	$429,461
Financial and Insurance Services	$291,199
Rental, Hiring and Real Estate Services	$151,638
Construction	$139,640
Information Media and Telecommunications	$139,495
Mining	$127,586
Wholesale Trade	$112,506
Administrative and Support Services	$105,297
Transport, Postal and Warehousing	$102,266
Public Administration and Safety	$89,057
Manufacturing	$76,495
Health Care and Social Assistance	$73,459
Professional, Scientific and Technical Services	$72,651
Education and Training	$63,928
Agriculture, Forestry and Fishing	$54,822
Retail Trade	$54,806
Arts and Recreation Services	$50,459

Industry Sector	GRP Per Employee
Other Services	$47,297
Accommodation and Food Services	$42,788

Source: ABS (2011, 2015b), AEC (unpublished)

Figure 3.3: GRP Per Employee



Source: ABS (2011, 2015b), AEC (unpublished)

3.4 Incomes

- Noosa Shire's highest average industry income was in mining at $1,742.9 per week in 2011, followed by electricity, gas, water and waste services ($1,366.7 per week), and financial and insurance services ($1,175.2 per week).
- Industries most closely associated with the tourism sector[1] offered the lowest wages, including arts and recreation services ($698.5 per week), accommodation and food services ($612.7 per week), and retail trade ($607.2 per week).

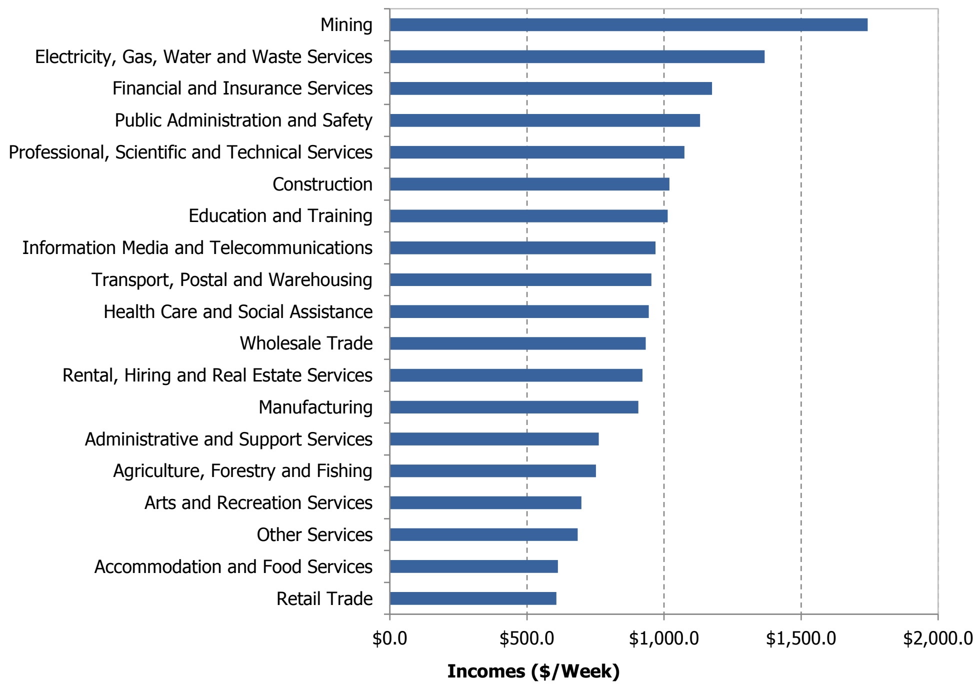
[1] Industries which tend to be influenced most significantly by tourism expenditure include retail, accommodation and food services and transport, postal and warehousing.

Table 3.3: Average Industry Incomes, $/week (2011)

Industry	Noosa	Queensland
Mining	$1,742.9	$1,792.7
Electricity, Gas, Water and Waste Services	$1,366.7	$1,432.1
Financial and Insurance Services	$1,175.2	$1,214.9
Public Administration and Safety	$1,131.7	$1,236.3
Professional, Scientific and Technical Services	$1,074.3	$1,269.0
Construction	$1,019.4	$1,135.8
Education and Training	$1,013.1	$1,029.0
Information Media and Telecommunications	$968.8	$1,073.3
Transport, Postal and Warehousing	$953.5	$1,079.4
Health Care and Social Assistance	$944.5	$979.9
Wholesale Trade	$933.1	$1,031.5
Rental, Hiring and Real Estate Services	$921.3	$1,003.4
Manufacturing	$906.3	$1,029.1
Administrative and Support Services	$762.2	$825.5
Agriculture, Forestry and Fishing	$751.2	$735.4
Arts and Recreation Services	$698.5	$742.0
Other Services	$685.1	$797.4
Accommodation and Food Services	$612.7	$546.7
Retail Trade	$607.2	$636.1

Source: ABS (2011)

Figure 3.4: Average Industry Incomes Per Week (2011)



Source: ABS (2011)

Table 3.4: Noosa Incomes by Industry (Inflation Adjusted to November 2014)

Industry	Noosa
Mining	$1,953.4
Electricity, Gas, Water and Waste Services	$1,531.8
Financial and Insurance Services	$1,317.1
Public Administration and Safety	$1,268.4
Professional, Scientific and Technical Services	$1,204.1
Construction	$1,142.5
Education and Training	$1,135.5
Information Media and Telecommunications	$1,085.8
Transport, Postal and Warehousing	$1,068.7
Health Care and Social Assistance	$1,058.6
Wholesale Trade	$1,045.8
Rental, Hiring and Real Estate Services	$1,032.6
Manufacturing	$1,015.8
Administrative and Support Services	$854.3
Agriculture, Forestry and Fishing	$841.9
Arts and Recreation Services	$782.9
Other Services	$767.8
Accommodation and Food Services	$686.7
Retail Trade	$680.5

Source: ABS (2011, 2015c)

3.5 Business Counts by Employment Size

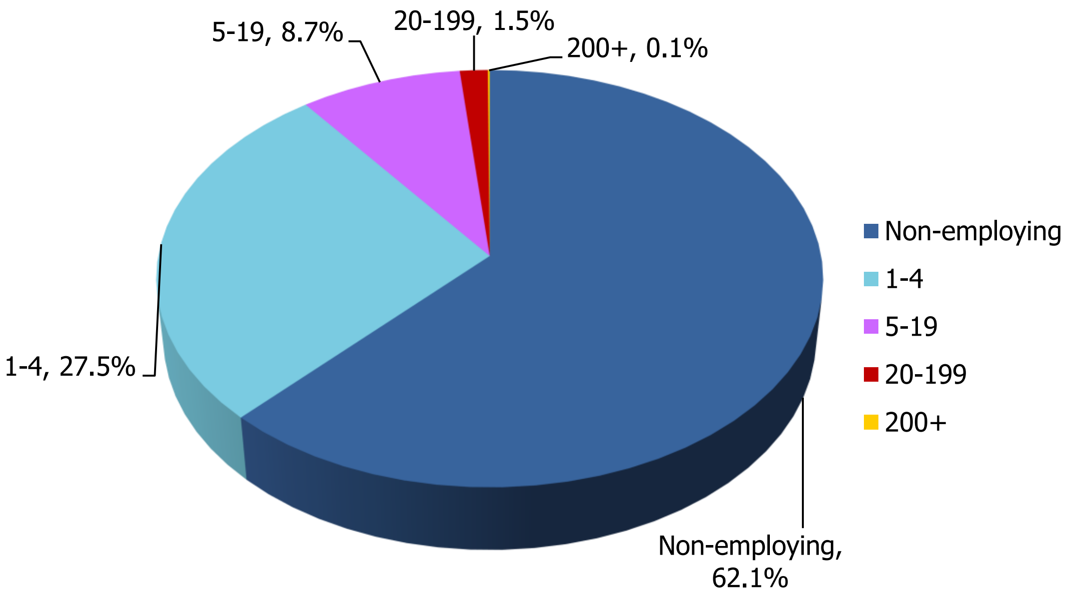
- The majority of businesses in Noosa Shire are non-employing, with the 4,671 businesses making up 62.1% of all business. This business segment has declined by 4.2% since 2012.
- Businesses employing 1-4 people have decreased in number from 2,001 to 1,980 (1.0%) between 2012 and 2014.
- Businesses employing between 5-19 people have remained steady at approximately 630 businesses.
- Businesses employing 20-199 people have increased in number from 99 to 111 businesses (12.1%).
- Businesses employing 200+ people have increased in number from 3 to 9 (200.0%) between 2012 and 2014.
- Overall the number of businesses in Noosa Shire has declined 2.7% since 2012.

Table 3.5: Noosa LGA Business Counts by Employment Size

Employment Size	2012	2014	% Growth
Non-employing	4,671	4,477	-4.2%
1-4	2,001	1,980	-1.0%
5-19	630	627	-0.5%
20-199	99	111	12.1%
200+	3	9	200.0%
Total	**7,404**	**7,204**	**-2.7%**

Source: ABS (2015d)

Figure 3.5: Noosa LGA Business Counts by Employment Size (2014)



Source: ABS (2015d)

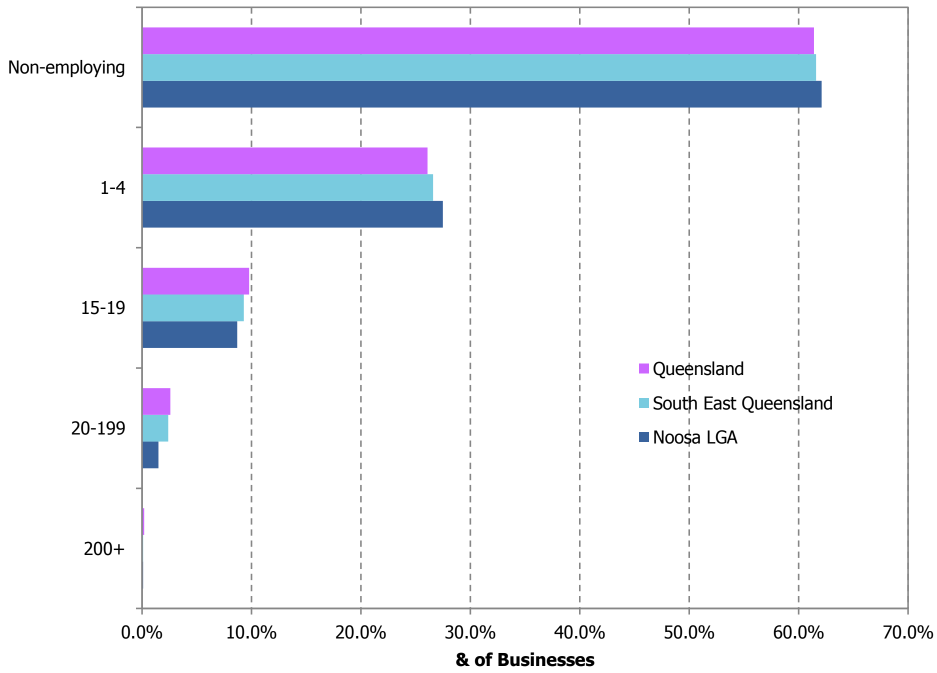
- Noosa Shire has a relatively high proportion of small businesses, with 89.6% of businesses employing less than five people compared to 88.2% of SEQ Businesses and 87.5% of Queensland businesses.

Table 3.6: Business Count Benchmarks

Employment Size	Noosa LGA	South East Queensland	Queensland
Non-employing	62.1%	61.6%	61.4%
1-4	27.5%	26.6%	26.1%
5-19	8.7%	9.3%	9.8%
20-199	1.5%	2.4%	2.6%
200+	0.1%	0.1%	0.2%
Total	**100.0%**	**100.0%**	**100.0%**

Source: ABS (2015d)

Figure 3.6: Business Counts by Employment Size



Source: ABS (2015d)

3.6 Business Counts by Turnover Range

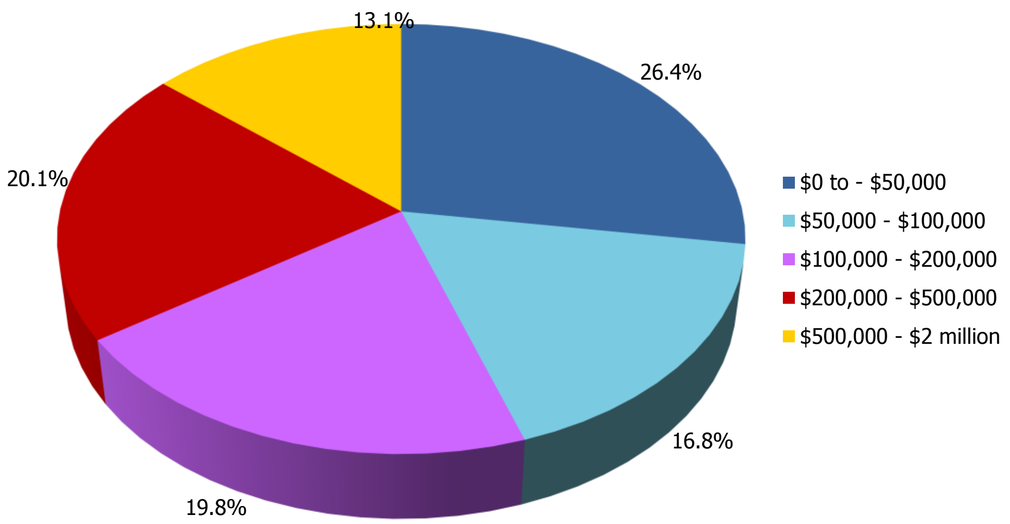
- Around 1,900 businesses (or 26.4% of businesses in Noosa Shire) turnover $0-$50,000 per annum. The number of businesses in this turnover range has decreased by 9.3% since 2012.
- Businesses turning over $50,000-$100,000 per annum have decreased by 8.0%, declining from 1,316 to 1,211 businesses between 2012 and 2014. Businesses in this turnover range account for 16.8% of all businesses in Noosa Shire.
- Businesses turning over $100,000-$200,000 per annum have increased by 0.6%, growing from 1,421 to 1,430 between 2012 and 2014. Businesses in this turnover range account for 19.8% of all businesses in Noosa Shire.
- Businesses turning over $200,000-$500,000 per annum have increased by 2.9%, growing from 1,412 to 1,453 between 2012 and 2014. Businesses in this turnover range account for 20.1% of all businesses in Noosa Shire.
- Businesses turning over $500,000-$2 million per annum have increased by 3.5%, growing from 916 to 948 between 2012 and 2014. Businesses in this turnover range account for 13.1% of all businesses in Noosa Shire.
- Businesses turning over $2 million or more per annum have increased by 5.0%, growing from 262 to 275 between 2012 and 2014. Businesses in this turnover range account for 3.8% of all businesses in Noosa Shire.

Table 3.7: Noosa LGA Business Counts by Turnover Range

Turnover	2012	2014	% Growth
Zero to $50k	2,100	1,905	-9.3%
$50k to less than $100k	1,316	1,211	-8.0%
$100k to less than $200K	1,421	1,430	0.6%
$200k to less than $500k	1,412	1,453	2.9%
$500k to less than $2 million	916	948	3.5%
$2 million or more	262	275	5.0%
Total	**7,427**	**7,222**	**-2.8%**

Source: ABS (2015d)

Figure 3.7: Noosa LGA Business Counts by Turnover Range



Source: ABS (2015d)

3.7 Cluster Maps

Cluster mapping portrays regional Location Quotients (LQs) against benchmark industry employment growth over time. By doing this, growth opportunities in specific industry sectors can be identified.

The cluster maps highlight where Noosa has an existing natural competitive advantage against the national industry backdrop.

Industry clusters located above the "1" on the vertical axis indicate an existing industry concentration and a strength or competitive advantage within the region. Forecast national industry employment growth (2014-2019) is plotted along the horizontal axis, with 'zero per cent' growth over the five years creating a midline. The further to the right of this central horizontal axis, the faster the industry is forecast to expand. Similarly, the further to the left, the faster it is forecast to contract. The size of the cluster (bubble) within the map represents the size of the local workforce in the industry sector.

The cluster maps identify the national industry sectors where the Noosa Shire has a relative competitive advantage (upper section). These are natural targets for economic and industrial development. The maps also shows industry employment sectors that are growing at the national level but not currently strongly represented in the region (lower right quadrant). It further shows employment sectors that are forecast to contract nation-wide, identifying those sectors likely to be shedding jobs across Australia (left side of graph). In order to grow locally, these sectors will need to be focused in very niche industries.

Cluster maps are presented at the ANZSIC single digit (19 sector) level. A more detailed two digit industry map are also provided for the manufacturing sector.

Well represented, high growth industry sectors for Noosa Shire include:

- Rental, hiring and real estate services (LQ 2.2).
- Accommodation and food services (LQ 2.1).
- Retail trade (LQ 1.5).

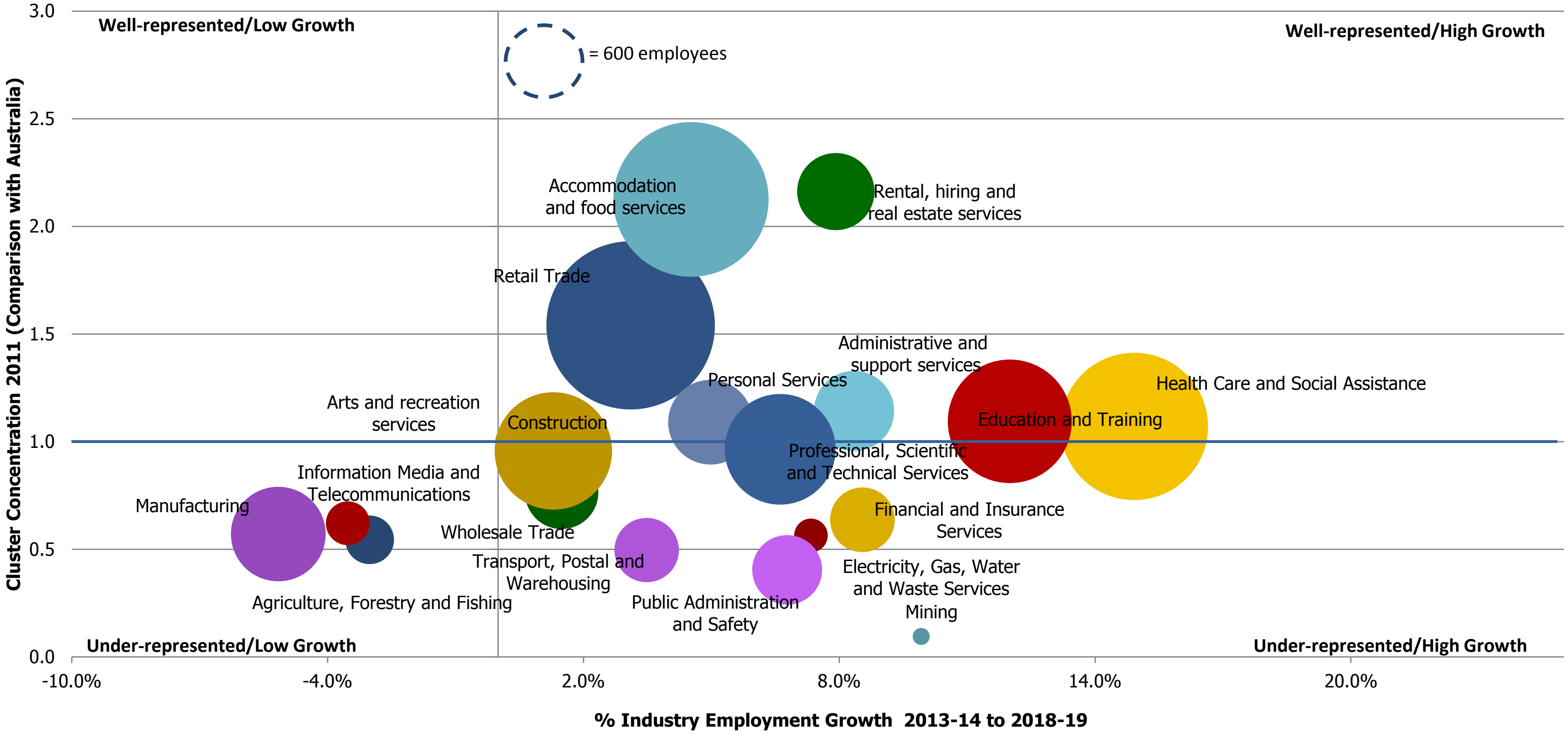
Future high growth sectors in which Noosa Shire is underrepresented include:

- Financial and insurance services (LQ 0.6).
- Electricity, gas, water and waste services (LQ 0.6).
- Public administration and safety (LQ 0.4).
- Mining (LQ 0.1).

In terms of two digit manufacturing sectors, Noosa Shire is strongly represented in two sectors forecast to experience declining employment:

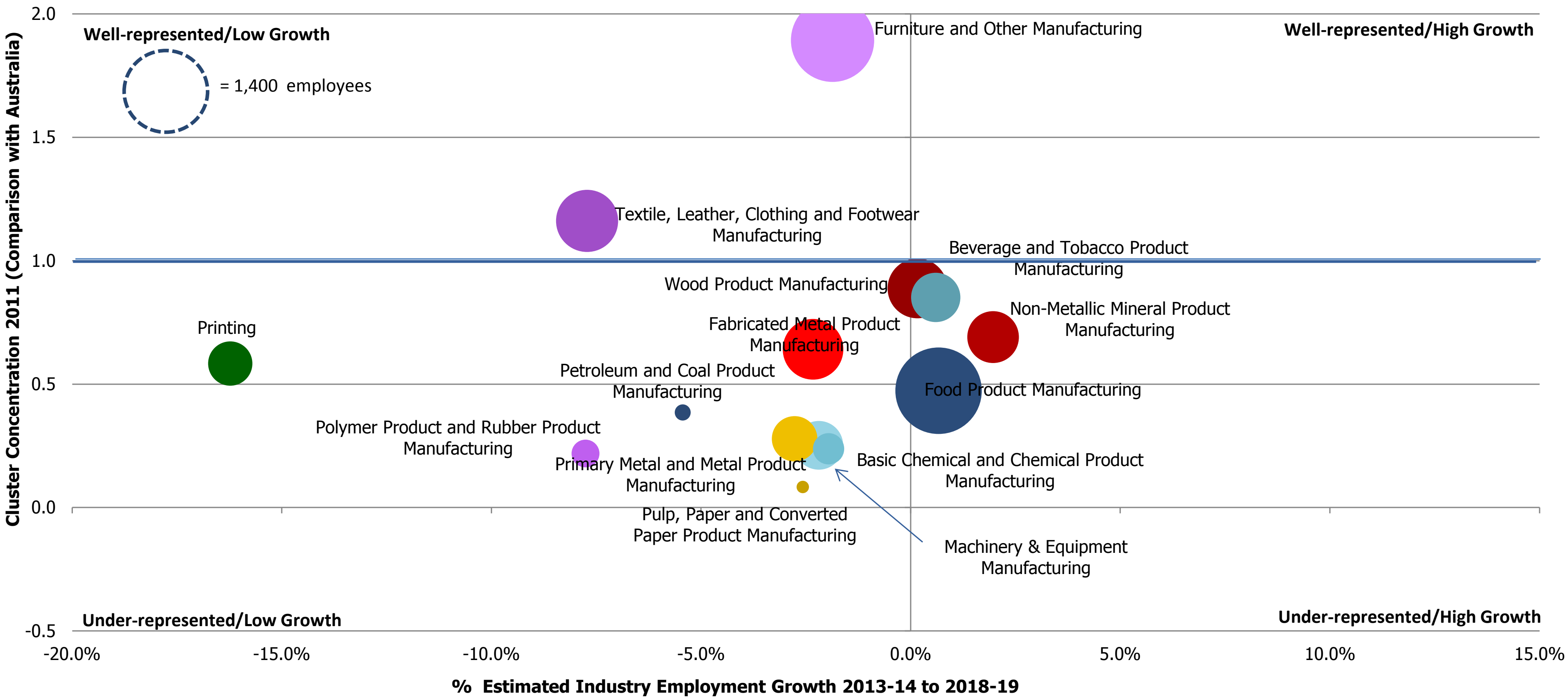
- Furniture and other manufacturing (LQ 1.9).
- Textile, leather, clothing and footwear manufacturing (LQ 1.2).

Figure 3.8: Cluster Map (ANZSIC 1 Digit)



Source: ABS (2011), IbisWorld (2015)

Figure 3.9: Cluster Map (2 Digit ANZSIC)



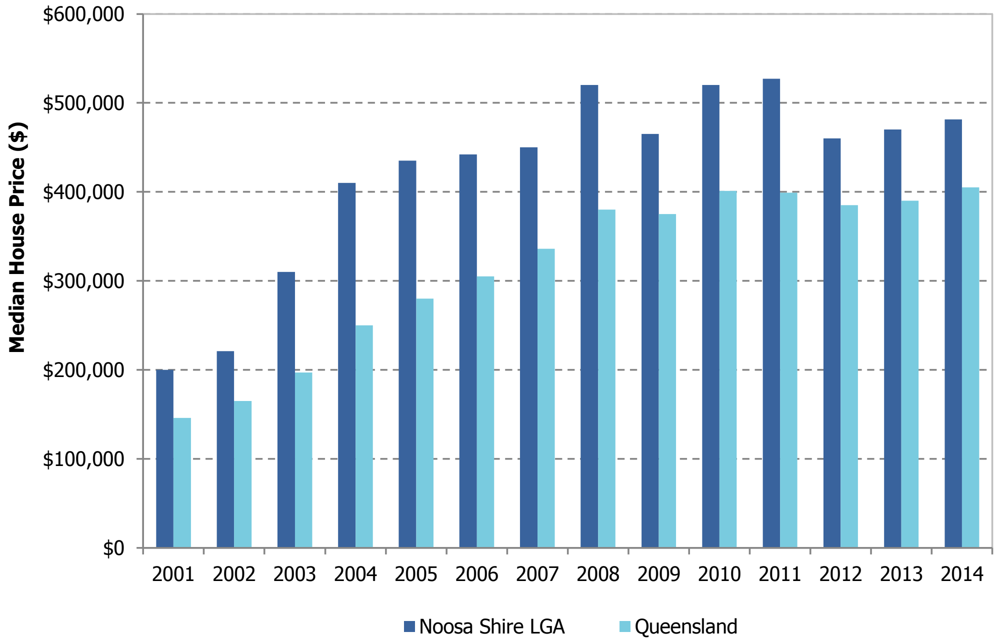
Source: ABS (2011), IbisWorld (2015)

4. Property Market

4.1 Median House Prices

- Figure 4.1 shows the median house price in Noosa rose by an estimated annual average of 7.0% between 2001 and 2014. This is slightly lower than the State where the median house price was estimated to have grown by 8.2% annually on average over the same period.
- The median house price in the Shire has remained higher than the State between 2001 and 2014. In 2014 the Median house price in the Shire was $481,410, while in the State was $405,000.
- The difference in the median house price between the Shire and the State in 2014 ($76,410) was at its lowest in 12 years.

Figure 4.1: Median House Prices, Noosa Shire LGA and Queensland, 2001 - 2014

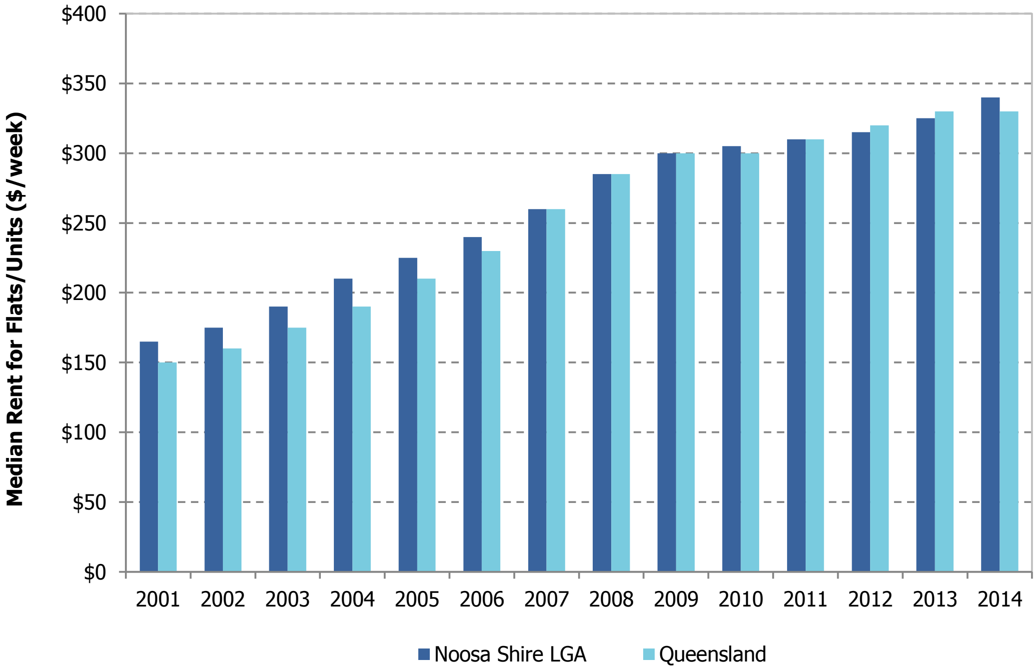


Note: Median House Prices are for Attached and Detached Dwellings
Source: QGSO (2015).

4.2 Mortgage Payments and Rent

- Median rents for flats/ units in Noosa rose by an estimated annual average of 5.7% between 2001 and 2014. This is slightly lower than the State where the median rents for flats/ units was estimated to have grown by 6.3% annually on average over the same period.
- Median rents for flats/ units in the Shire generally remained higher than the State between 2001 and 2006. Although from 2007 onwards, the median rent in the Noosa Shire has been equal to, or slightly below, that of the State (with the exception of 2014 where median rents were $340 and $330 per week respectively).

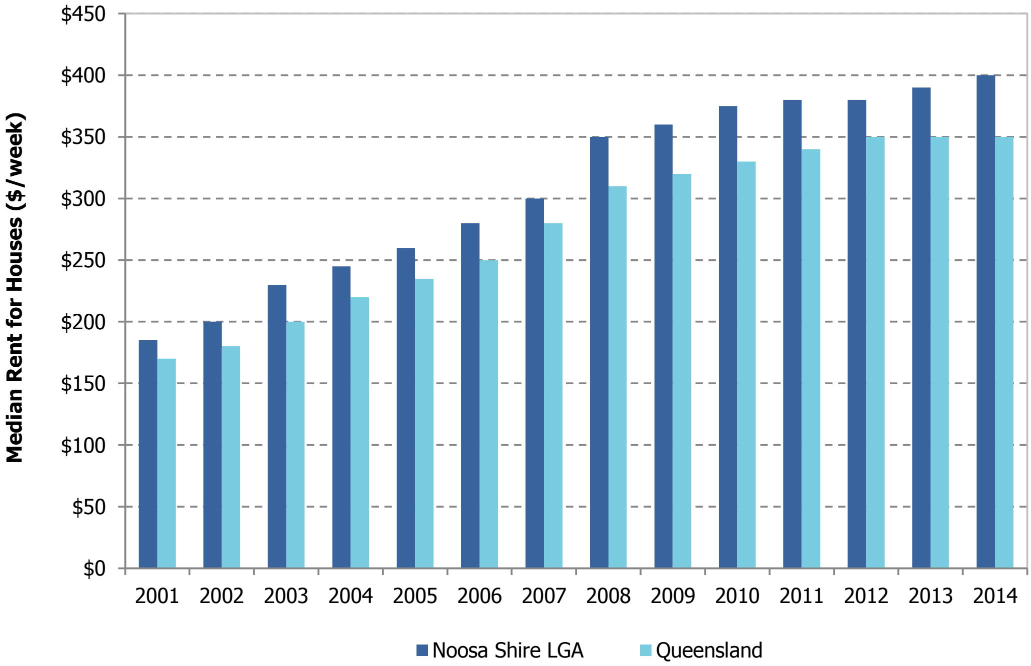
Figure 4.2: Median Rents for Flats/Units, Noosa Shire LGA and Queensland, 2001 - 2014



Note: Median Rents are for 2 bedroom flats/ units and valued at $ per week.
Source: QGSO (2015).

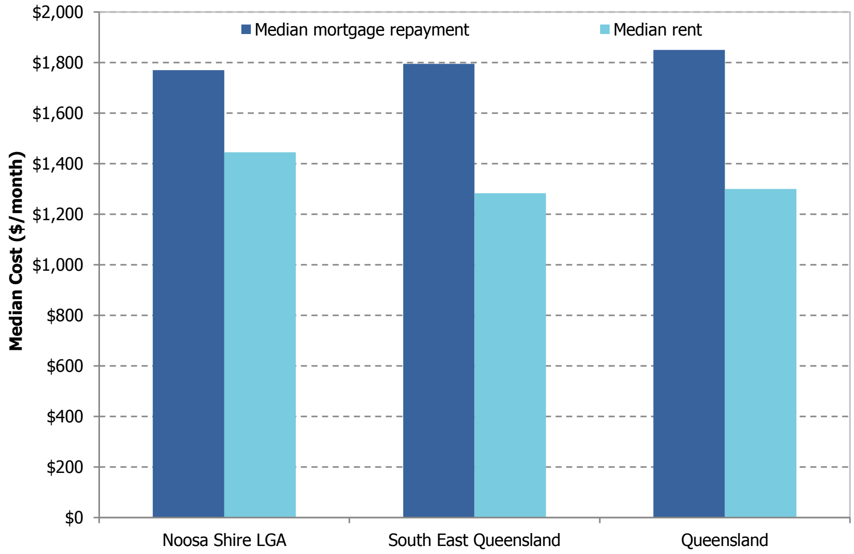
- Figure 4.3 shows that median rents for houses in Noosa Shire rose by an estimated annual average of 6.1% between 2001 and 2014. This is slightly higher than the State where the median rents for houses was estimated to have grown by 5.7% annually on average over the same period.
- Median rents for houses in the Shire remained higher than the State between 2001 and 2014. In 2014 the median rent for houses in the Shire was $400 per week compared to $350 per week for the State.
- The difference in the median rents for houses between the Shire and the State in 2014 ($50 per week) was at its highest over the forecast period.

Figure 4.3: Median Rents for Houses, Noosa Shire LGA and Queensland, 2001 - 2014



Note: Median Rents are for 3 bedroom houses and valued at $ per week.
Source: QGSO (2015)

Figure 4.4: Median Mortgage Repayments and Median Rent, Broader Region, 2011

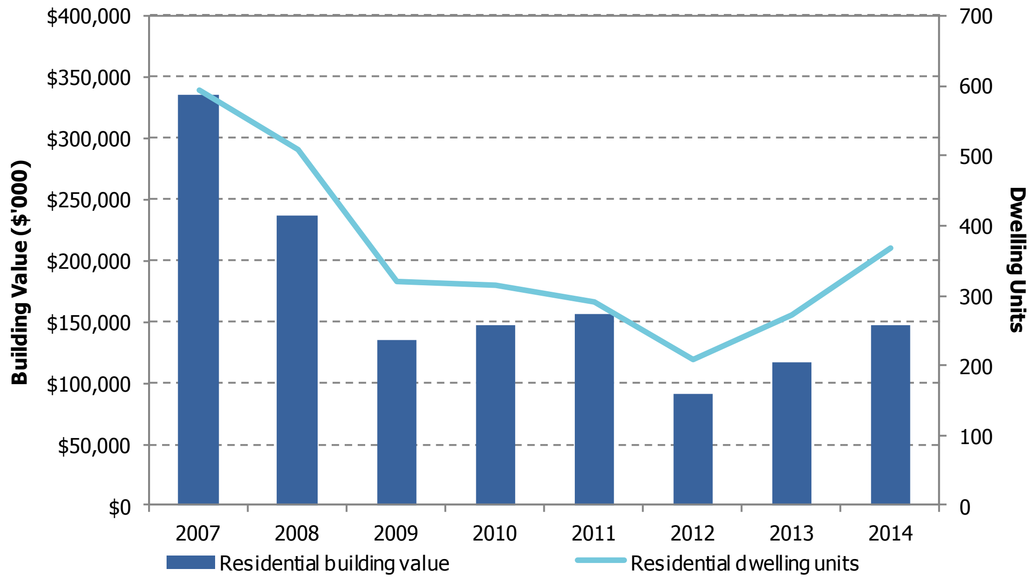


Source: ABS (2011)

4.3 Residential Building Approvals

- Residential building approval values have increased from $100 million to $150 million between 2012 and 2014, during this same period the number of approved dwelling units increased from 200 to 360.
- Residential building approvals in Noosa Shire declined in value and number of dwelling units between 2007 and 2012, with a decline in value from $340 million to $100 million (600 declining to 200 dwelling units). This reflects the slowdown in the Australian economy after the 2008 global financial crisis.

Figure 4.5: Noosa LGA Residential Building Approvals



Source: ABS (2015c)

4.4 Non-Residential Building Value

- Non-residential building approval values have decreased from nearly $100 million to $20 million from 2008 to 2014.

Figure 4.6: Noosa LGA Non-Residential Building Approvals

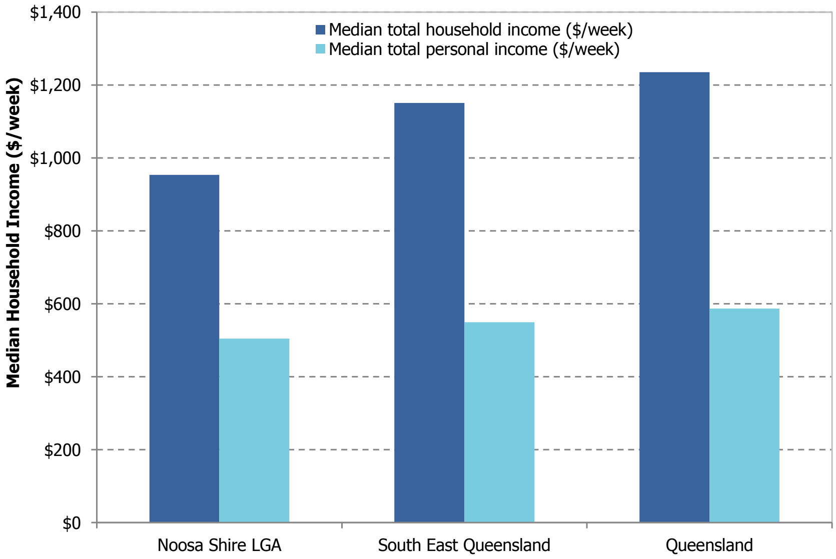
Source: ABS (2015c)

5. Households

5.1 Household and Personal Income

- Noosa Shire reported a median household income almost $200 below the SEQ Region's and almost $300 below the State's in 2011 ($953.5, $1,150.7 and $1,235.0 per week respectively).

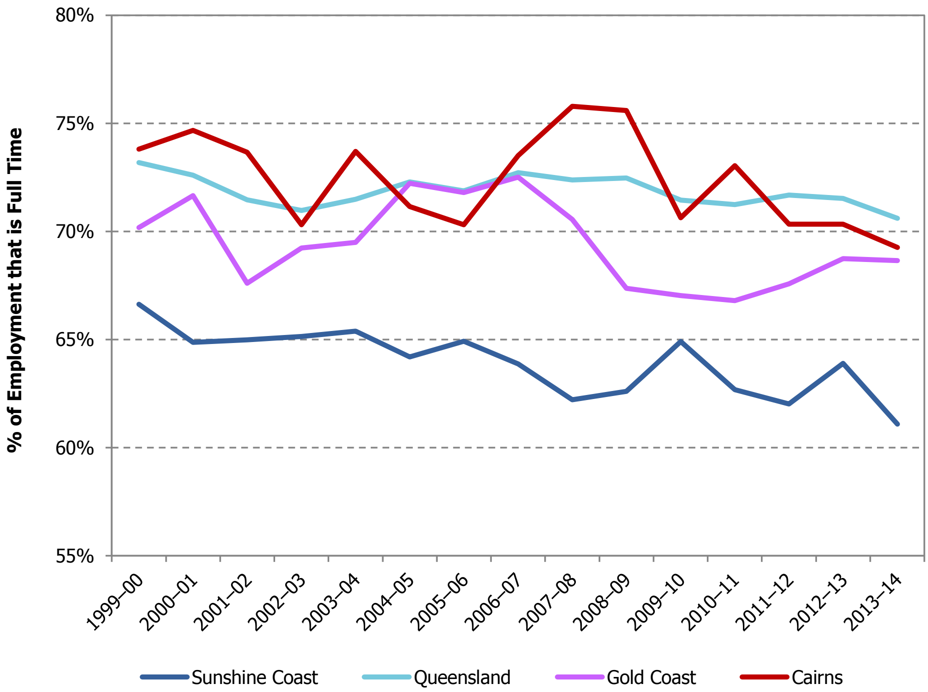
Figure 5.1: Median Household and Personal Income, Broader Region, 2011



Source: ABS (2011)

- One of the key reasons for low incomes levels is the high proportion of part-time work. Part time work accounts for around 35%-40% of total employment within the broader Sunshine Coast Statistical Area Level 4 (SA4), compared to around 25%-30% in other benchmark regions (see Figure 5.2).

Figure 5.2: Proportion of Employment That is Full Time

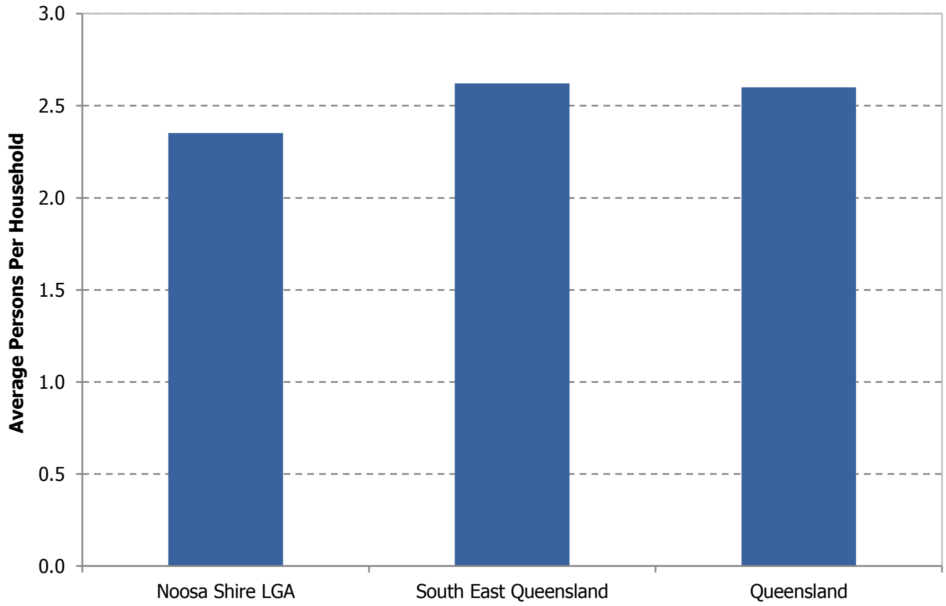


Source: ABS (2015d)

5.2 Household Size

- Noosa Shire features lower average persons per household (2.4 persons) compared to the SEQ Region (2.6 persons) and State (2.6 persons).

Figure 5.3: Average Persons per Household, Broader Region, 2011

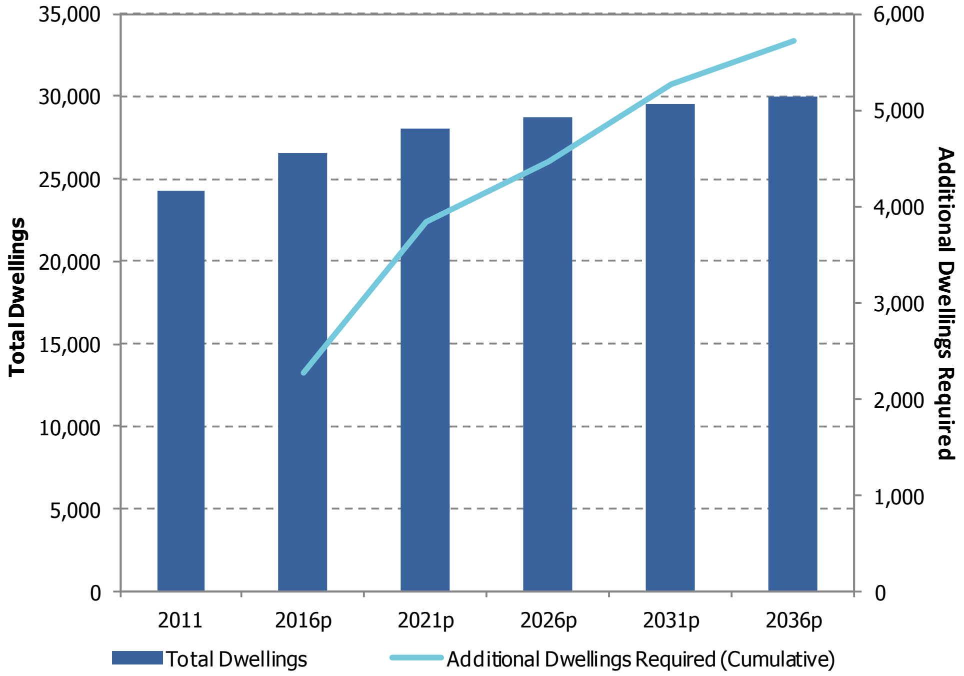


Source: ABS (2011)

5.3 Additional Dwellings Required to Service Population Growth

- The additional dwellings required to service growth in Noosa Shire (from 2011) totals 2,300 in 2016, rising to 5,700 dwellings by 2036.
- The major increase in additional dwellings required is in the period 2011-2021, requiring almost 3,800 dwellings. This reflects higher forecast population growth over the period compared to longer term projections.

Figure 5.4: Additional Dwelling Requirements (Cumulative)



Source: QGSO (2015)

6. Labour Force

6.1 Unemployment and Labour Force

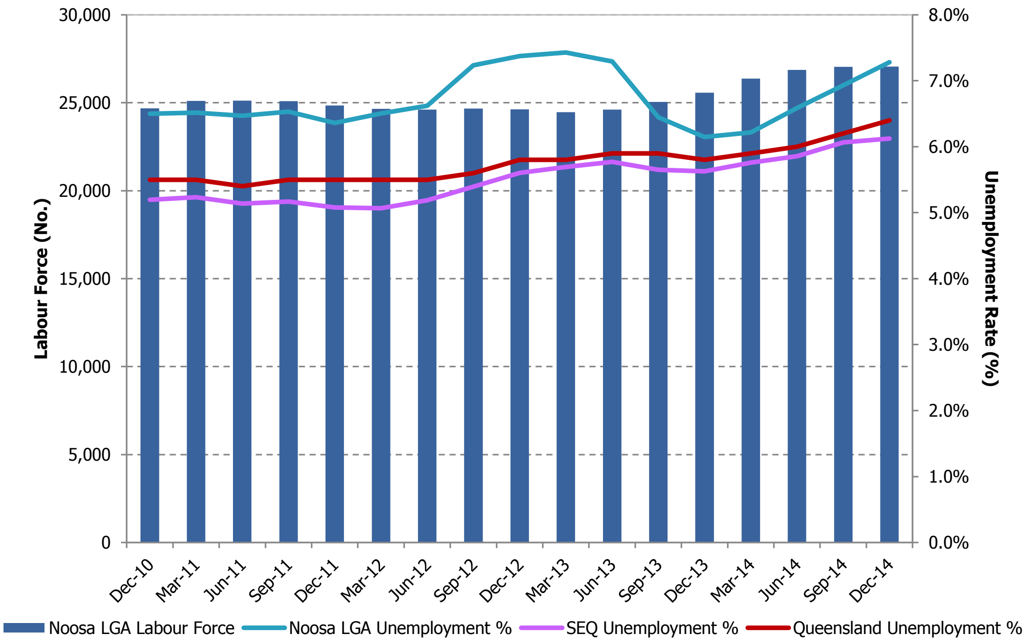
- There were 25,085 employed people in the Shire as at December 2014, with an unemployment rate of 7.3% (1,970 people).
- The unemployment rate in the Shire is generally higher than the SEQ Region and the State, with an increase to 1.5 percentage points higher in 2012-13 and a convergence to +0.4 percentage points in late 2013–early 2014.

Table 6.1: Noosa LGA Labour Force Statistics

Date	Noosa LGA Labour Force	Noosa LGA Employed Persons	Noosa LGA Unemployed Persons	Noosa LGA Unemployment Rate
Dec-10	24,677	23,073	1,604	6.5%
Mar-11	25,098	23,463	1,635	6.5%
Jun-11	25,114	23,489	1,625	6.5%
Sep-11	25,095	23,456	1,639	6.5%
Dec-11	24,849	23,268	1,581	6.4%
Mar-12	24,646	23,043	1,603	6.5%
Jun-12	24,609	22,980	1,629	6.6%
Sep-12	24,672	22,887	1,785	7.2%
Dec-12	24,618	22,803	1,815	7.4%
Mar-13	24,460	22,643	1,817	7.4%
Jun-13	24,607	22,813	1,794	7.3%
Sep-13	25,045	23,431	1,614	6.4%
Dec-13	25,571	23,999	1,572	6.1%
Mar-14	26,374	24,734	1,640	6.2%
Jun-14	26,866	25,097	1,769	6.6%
Sep-14	27,035	25,161	1,874	6.9%
Dec-14	27,055	25,085	1,970	7.3%

Source: QGSO (2015)

Figure 6.1: Noosa LGA Unemployment and Labour Force

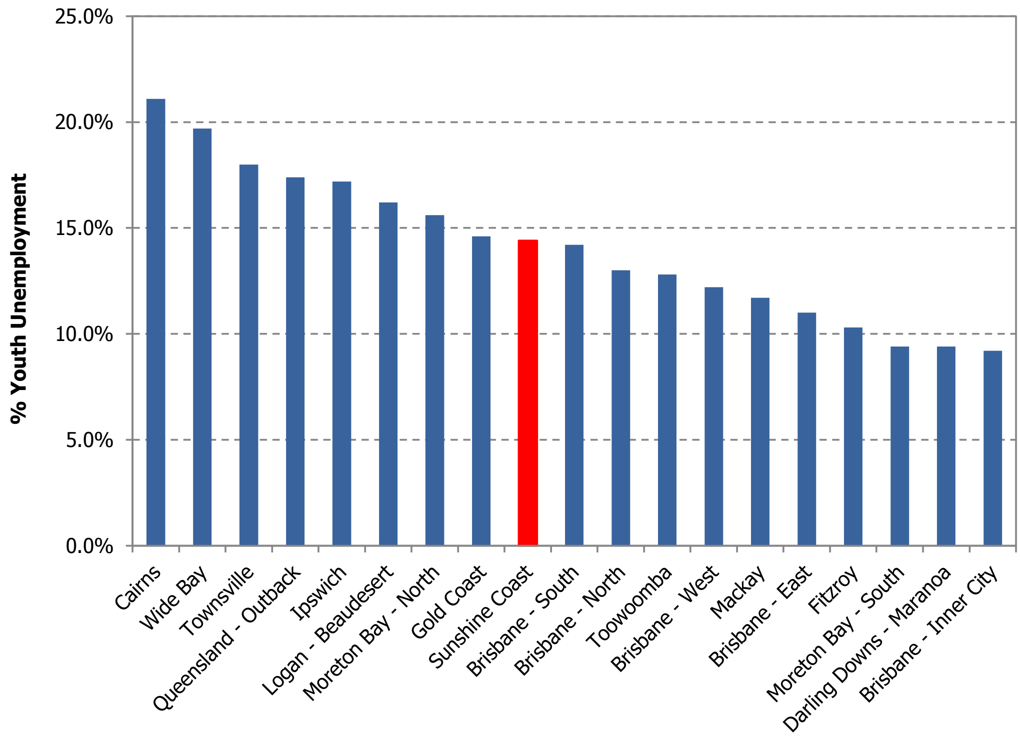


Source: QGSO (2015)

6.2 Youth Unemployment

- Youth unemployment (ages 15-24) in the broader Sunshine Coast SA4 averaged 14.4% over 2014, around average for Queensland SA4's.

Figure 6.2: Youth Unemployment Benchmarks

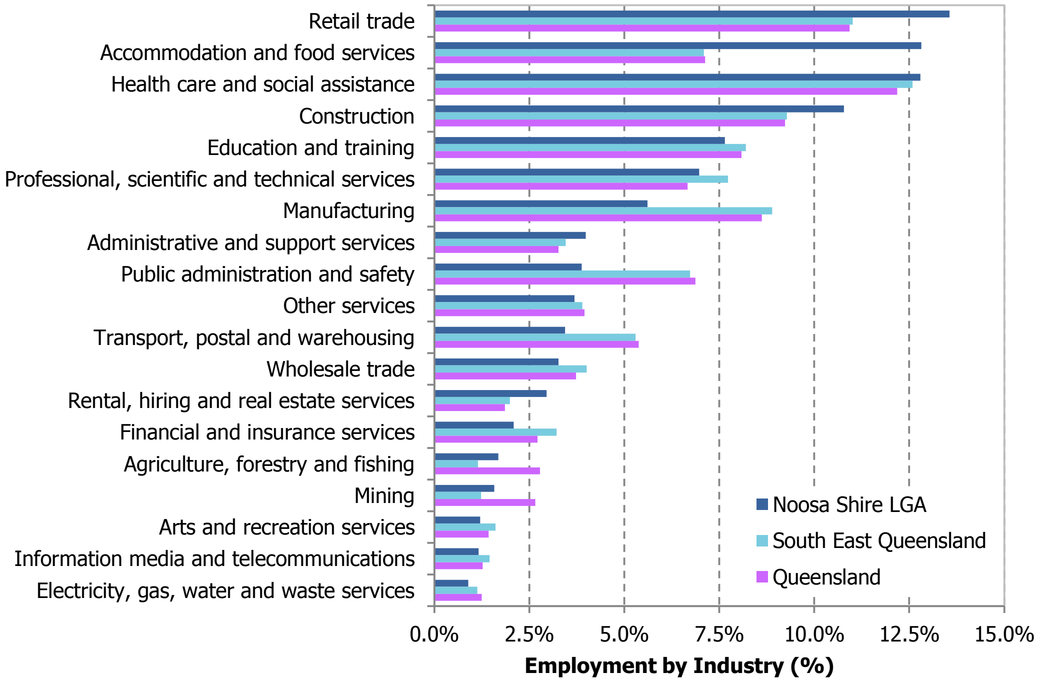


Source: ABS (2015d)

6.3 Employment by Industry by Place of Usual Residence

- Comparatively significant employers of the local workforce in the Shire in 2011 were:
  - Retail trade, accounting for 13.6% of local employment (about 2.5 percentage points higher than the SEQ Region and the State).
  - Accommodation and food services, accounting for 12.8% of local employment (about 5.7 percentage points higher than the SEQ Region and the State).
  - Health care and social assistance, accounting for 12.8% of local employment, which was slightly higher than the SEQ Region and the State.
  - Construction, accounting for 10.8% of local employment, (about 1.5 percentage points higher than the SEQ Region and the State).

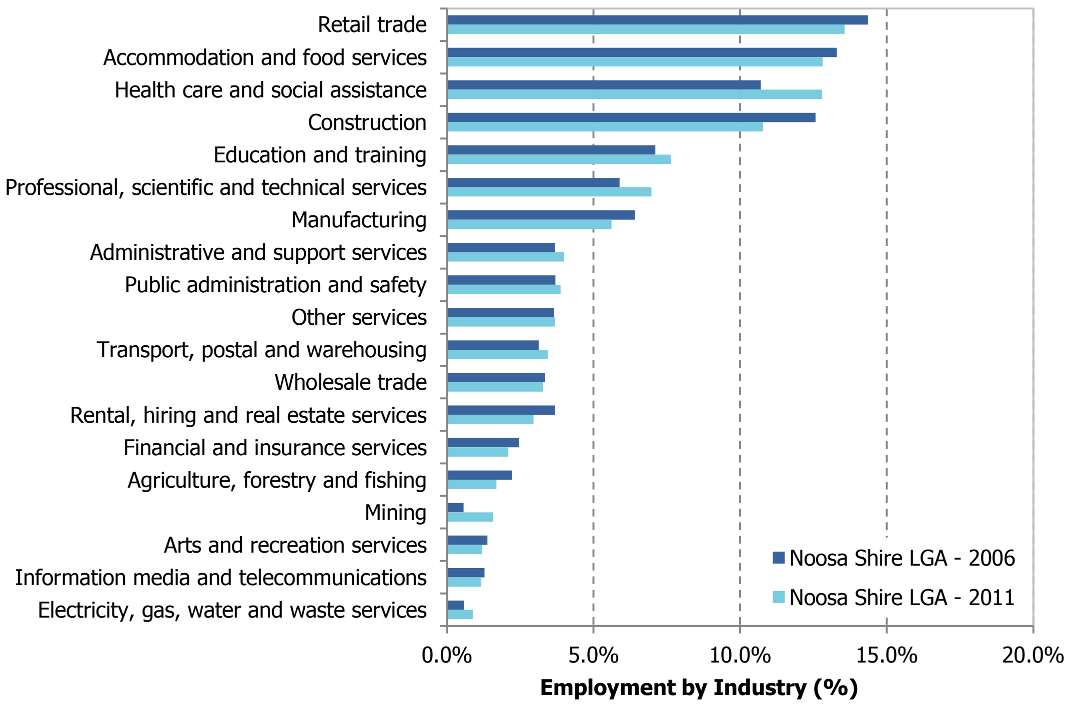
Figure 6.3: Employment by Industry (PoUR), Broader Region, 2011



Source: ABS (2011)

- Industries, which employed significantly higher numbers of persons in 2011 compared to 2006 in the Shire were:
  - Health care and social assistance, which grew by 2.1 percentage points or 546 jobs.
  - Professional, scientific and technical services, which grew by 1.1 percentage points or 289 jobs.
  - Mining, which grew by 1.5 percentage points or 212 jobs.
- Industries which employed significantly fewer persons in 2011 compared to 2006 in the Shire were:
  - Construction, which declined by 1.8 percentage points and lost 215 jobs over the period.
  - Rental, hiring and real estate services, which declined by 0.7 percentage points and lost 103 jobs over the period.
  - Manufacturing, which declined by 0.8 percentage points and lost 89 jobs over the period.
- Growth in professional, scientific and technical services, administrative and support services, health care and social services and education and training is particularly encouraging given they are sectors less dependent on the potential tourism market.

Figure 6.4: Employment by Industry (PoUR), Noosa Shire LGA, 2006 and 2011



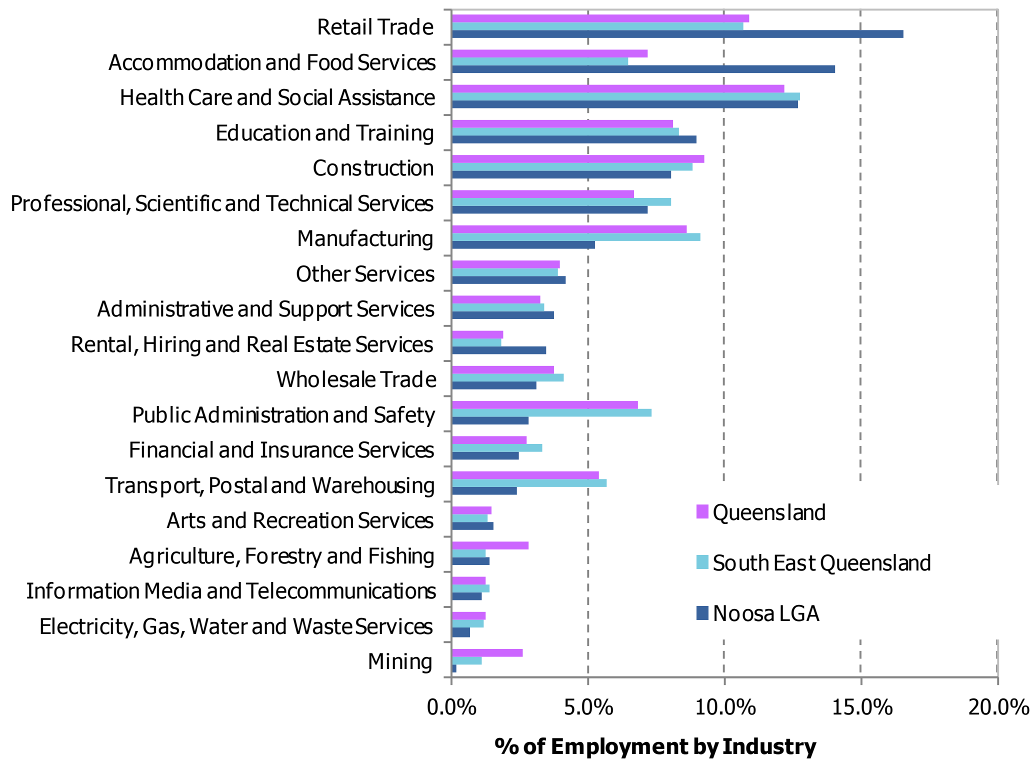
Source: ABS (2006 and 2011)

- Data suggests that Noosa's knowledge industries, particularly professional, scientific and technical services and administrative and support services, reported significant growth in employment between 2006 and 2011.
- Industries most closely associated with the tourism sector were generally 'less valuable' by output per employee and grew only marginally by contribution to Noosa's employment, or declined, between 2006 and 2011.

6.4 Employment by Industry by Place of Work

- Major Noosa Shire employment industries by place of work include retail trade (16.6% of employment), accommodation and food services (14.1%), and health care and social assistance (12.7%).
- Industries in which Noosa Shire is underrepresented compared to SEQ and Queensland include public administration and safety, transport, postal and warehousing, and mining.

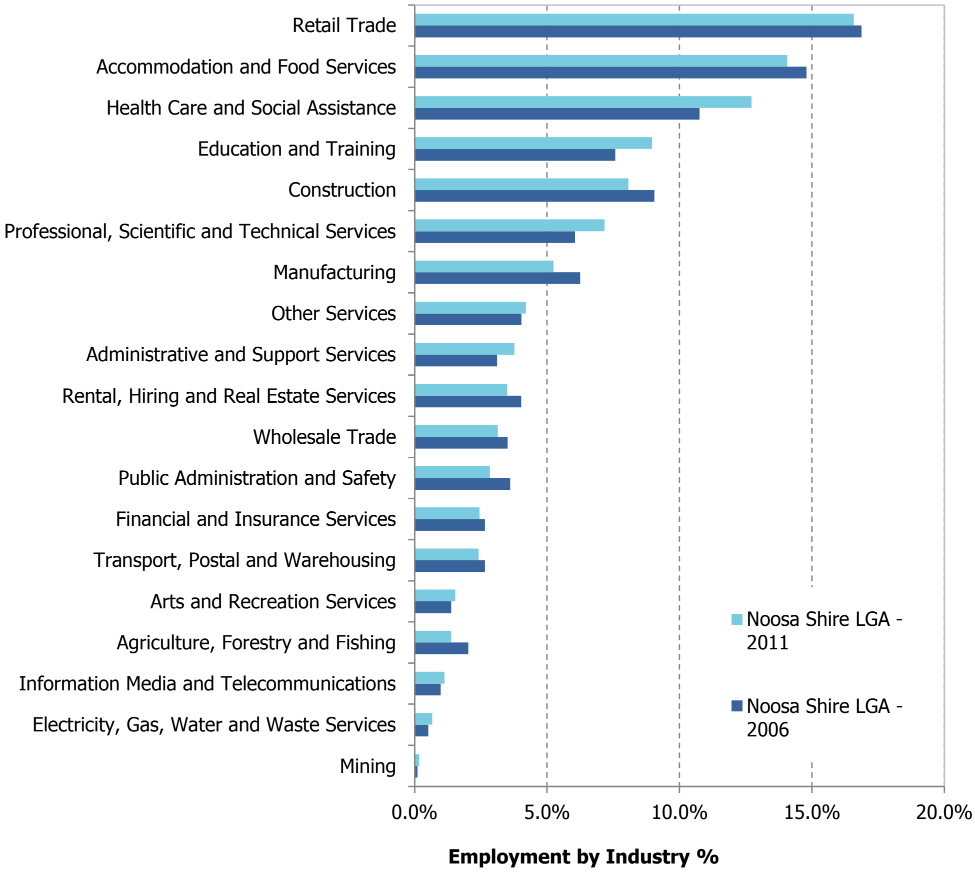
Figure 6.5: Employment by Industry PoW, 2011



Source: ABS (2011)

- Industries, which employed significantly higher numbers of persons in 2011 compared to 2006 in the Shire were:
  - Health care and social assistance, which grew by 2.0 percentage points or 587 jobs.
  - Education and training, which grew by 1.4 percentage points or 414 jobs.
  - Professional, scientific and technical services, which grew by 1.1 percentage points or 331 jobs.
  - Administrative and support services, which grew by 0.7 percentage points or 185 jobs.
- Industries which employed significantly fewer persons in 2011 compared to 2006 in the Shire included:
  - Manufacturing, which declined by 1.0 percentage points and lost 49 jobs over the period.
  - Public administration and safety, which declined 0.8 percentage points and lost 63 jobs over the period.
  - Agriculture, forestry and fishing, which declined by 0.6 percentage points and lost 74 jobs over the period.
- Growth in health care and social services, education and training, professional, scientific and technical services, and administrative and support services is particularly encouraging given they are sectors less dependent on the potential tourism market.

Figure 6.6: Employment by Industry (PoW), Noosa Shire LGA, 2006 and 2011



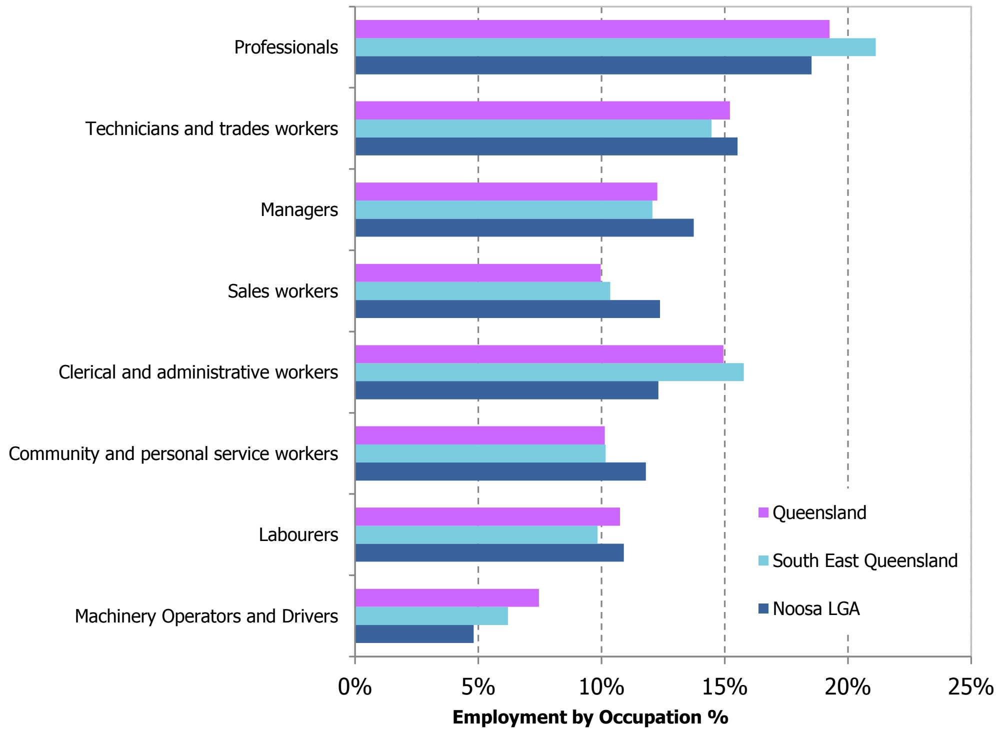
Source: ABS (2006 and 2011)

6.5 Employment by Occupation by Place of Usual Residence

Comparatively significant occupations of employment for the Shire in 2011 were:

- Professionals, accounting for 18.5% of all employment (although around 2.6 percentage points lower than the SEQ Region and slightly lower than the State).
- Technicians and trade workers, accounting for 15.5% of all employment (around 1.1 percentage points higher than the SEQ Region and slightly higher than the State).
- Managers, accounting for 13.7% of all employment (around 1.7 percentage points higher than the SEQ region and 1.5 percentage points higher than the State).
- Sales workers, accounting for 12.4% of all employment (around 2.0 percentage points higher than the SEQ Region and 2.4 percentage points higher than the State).

Figure 6.7: Employment by Occupation PoUR, 2011



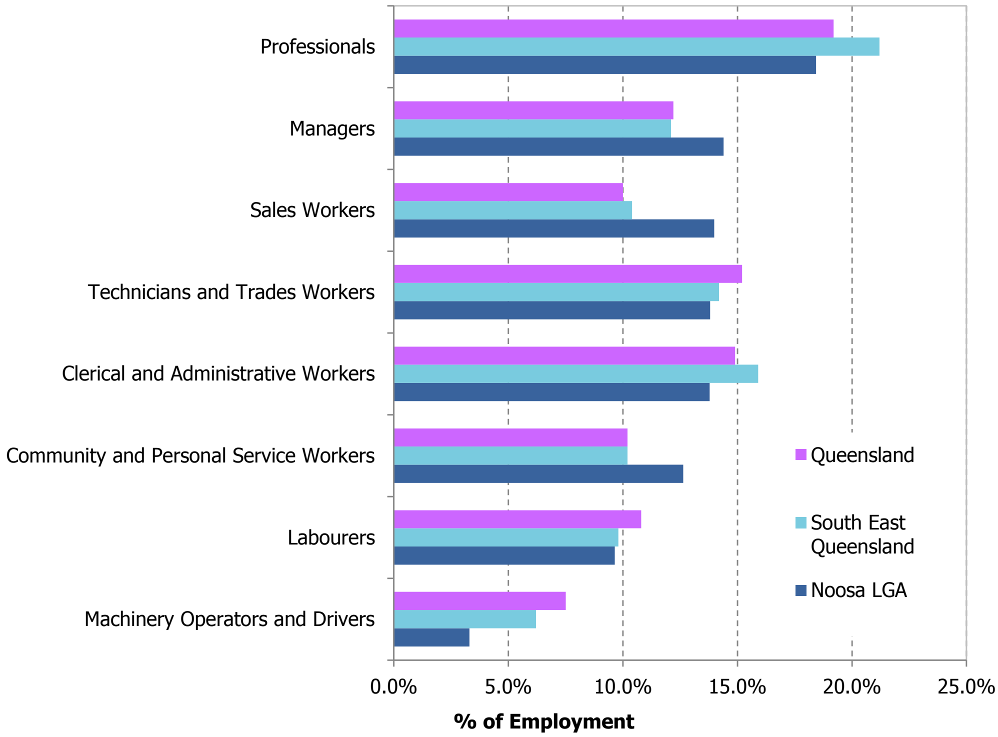
Source: ABS (2011)

6.6 Employment by Occupation by Place of Work

Comparatively significant occupations of employment for the Shire by place of work in 2011 were:

- Sales workers, accounting for 14.0% of all employment (around 3.6 percentage points higher than the SEQ Region and 2.4 percentage points higher than the State).
- Managers, accounting for 14.4% of all employment (2.3 percentage points higher than the SEQ Region and 2.2 percentage points higher than the State).
- Community and personal service workers, accounting for 12.6% of employment (2.4 percentage points higher than the SEQ Region and Queensland).

Figure 6.8: Employment by Occupation PoW, 2011

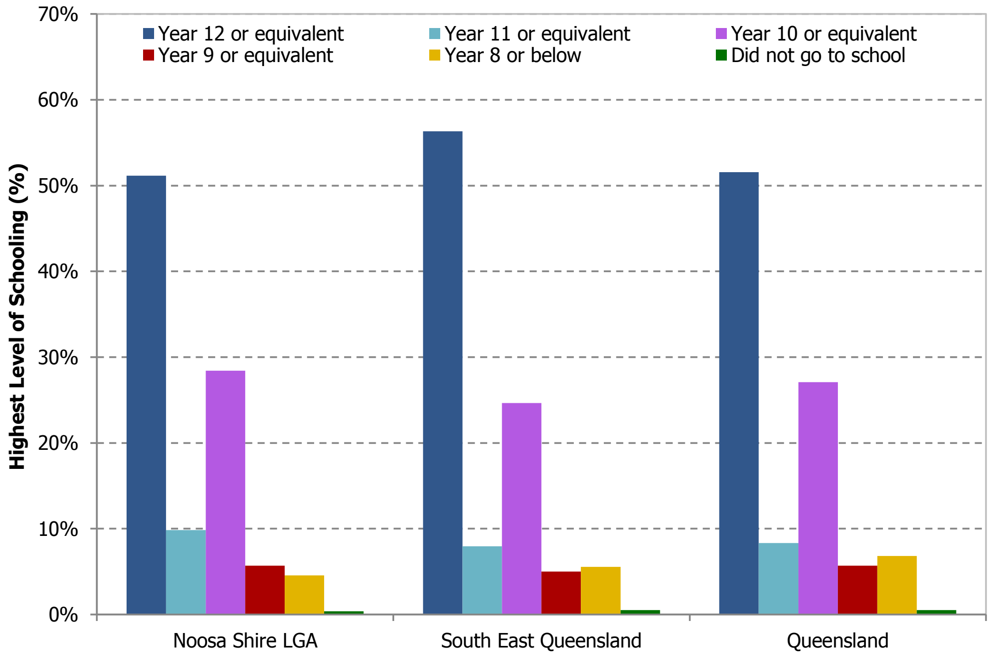


Source: ABS (2011)

6.7 Education

- Residents in the Shire were generally just as educated as the State at the highest secondary level (year 12) with 51.1% of local residents having completed year 12 or equivalent (compared to the State 51.6%), while slightly below than the SEQ Region (56.3%)
- Residents in the Shire were less likely to have only completed year 8 or below (4.5% of all residents) compared to the SEQ Region (5.6%) and the State (6.8%).

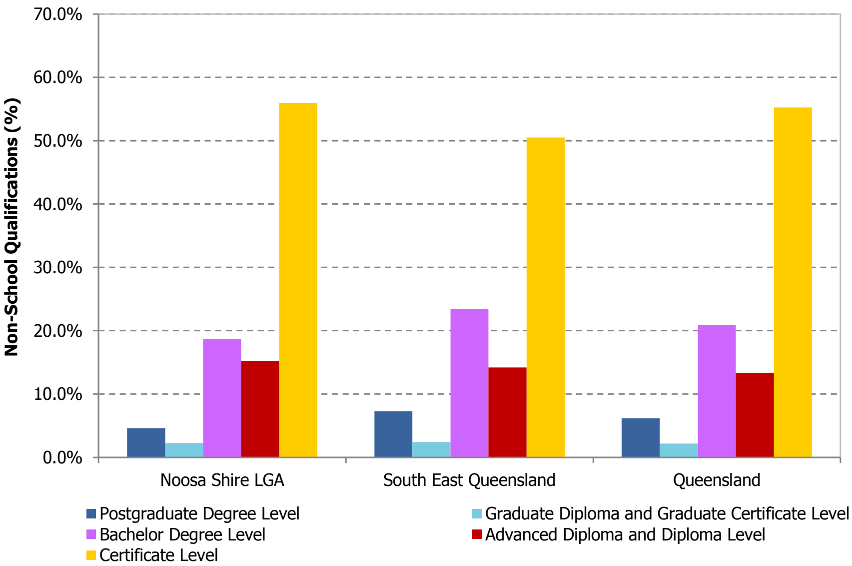
Figure 6.9: Highest Level of Schooling, Broader Region, 2011



Source: ABS (2011)

- Residents in the Shire were generally more likely than the State to have a certificate level non-school qualification (55.9% of all respondents compared to 55.2%) and even more likely than when compared to the SEQ Region (50.5%).

Figure 6.10: Non-School Qualifications, Broader Region, 2011

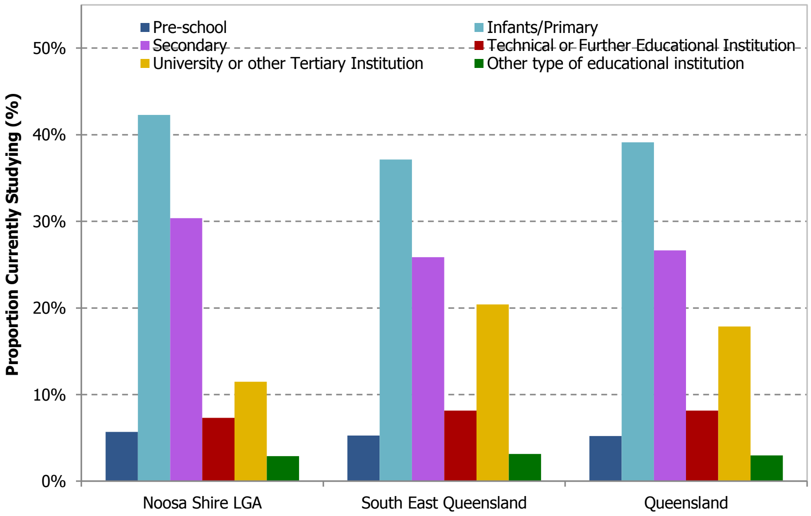


Source: ABS (2011)

- The most common institution being attended for those currently studying in the Shire was infants/ primary (42.3%), higher than the SEQ Region (37.2%) and State (39.1%).
- This was also the case for secondary with 30.4% of local residents currently studying being at the secondary level, compared to 25.9% for the SEQ region and 26.6% for the State.
- The Shire reported considerably fewer residents studying at a university or other tertiary institution in 2011 (only 11.5%) compared to the SEQ Region (20.4%) and the State 17.9%.
- Post school education options in Noosa Shire are somewhat limited since the closure of the Noosa TAFE campus. The Central Queensland University offers access to a range of

undergraduate and higher degrees from their Noosaville campus. The University of the Sunshine Coast offers a range of business subjects from their rooms at The J, Noosa Junction. There are various opportunities for certificate level training in Noosa.

Figure 6.11: Proportion Currently Studying, Broader Region, 2011



Source: ABS (2011)

6.8 Journey to Work

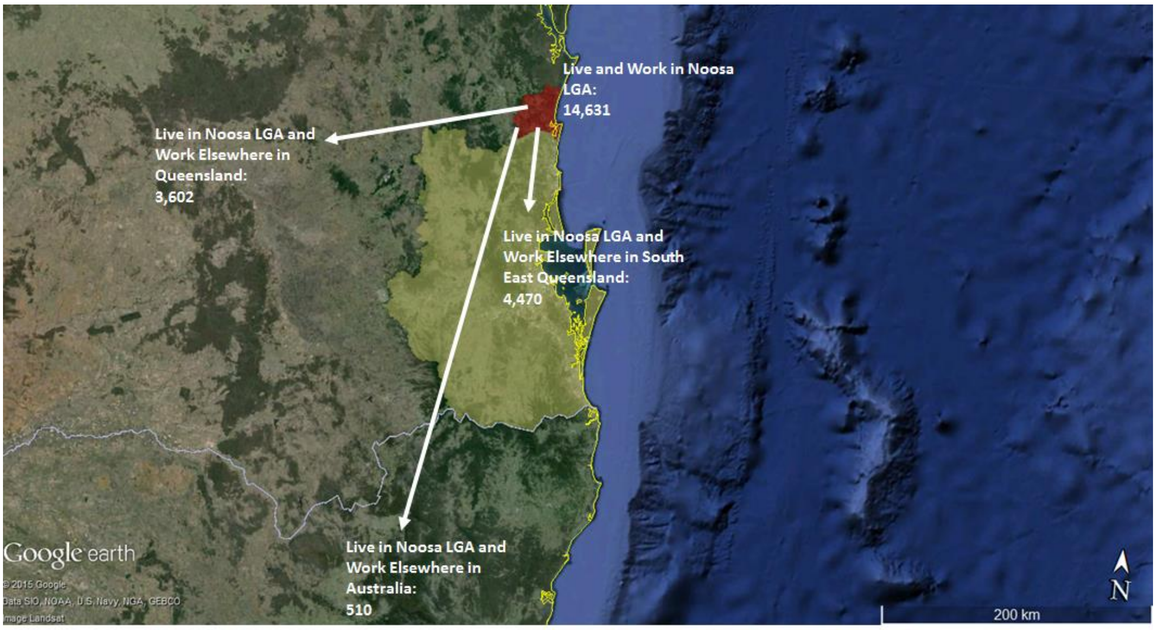
- Noosa Shire features significant employment outflows, with 23,000 employed residents and only 18,500 persons working within the Shire.
- The self-containment rate of the region (measuing the proportion of employed local residents working within Noosa) is 63.0%.

Table 6.2: Noosa LGA Residents Place of Work

Employed Noosa LGA Residents	Noosa LGA (2011)
Live and Work in Noosa LGA	14,631
Live in Noosa LGA and Work Elsewhere in South East Queensland	4,470
Live in Noosa LGA and Work Elsewhere in Queensland	3,602
Live in Noosa LGA and Work Elsewhere in Australia	510
Total Employed Persons Residing in Noosa LGA	**23,213**
Self-Containment %	63.0%

Note: Total does not align with employment by industry due to inadequately described and not stated responses.
Source: ABS (2011)

Figure 6.12: Noosa Shire LGA Residents Place of Work



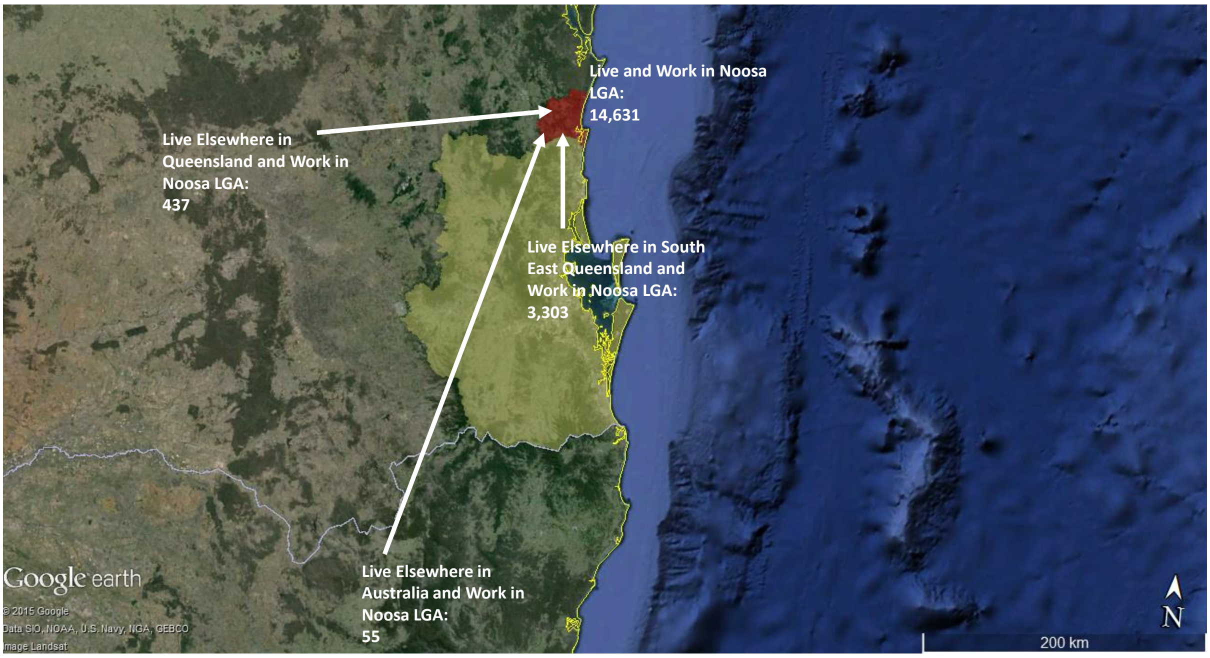
Source: ABS (2011), Google Earth (2015)

Table 6.3: Persons Working In Noosa Shire LGA Place of Residence

Persons Employed in Noosa LGA	Noosa LGA (2011)
Live and Work in Noosa	14,631
Live Elsewhere in South East Queensland and Work in Noosa LGA	3,303
Live Elsewhere in Queensland and Work in Noosa LGA	437
Live Elsewhere in Australia and Work in Noosa LGA	55
Total Persons Working in Noosa LGA	**18,426**

Note: Total does not align with employment by industry due to inadequately described and not stated responses.
Source: ABS (2011)

Figure 6.13: Persons Working In Noosa Shire LGA Place of Residence



Source: ABS (2011), Google Earth (2015)

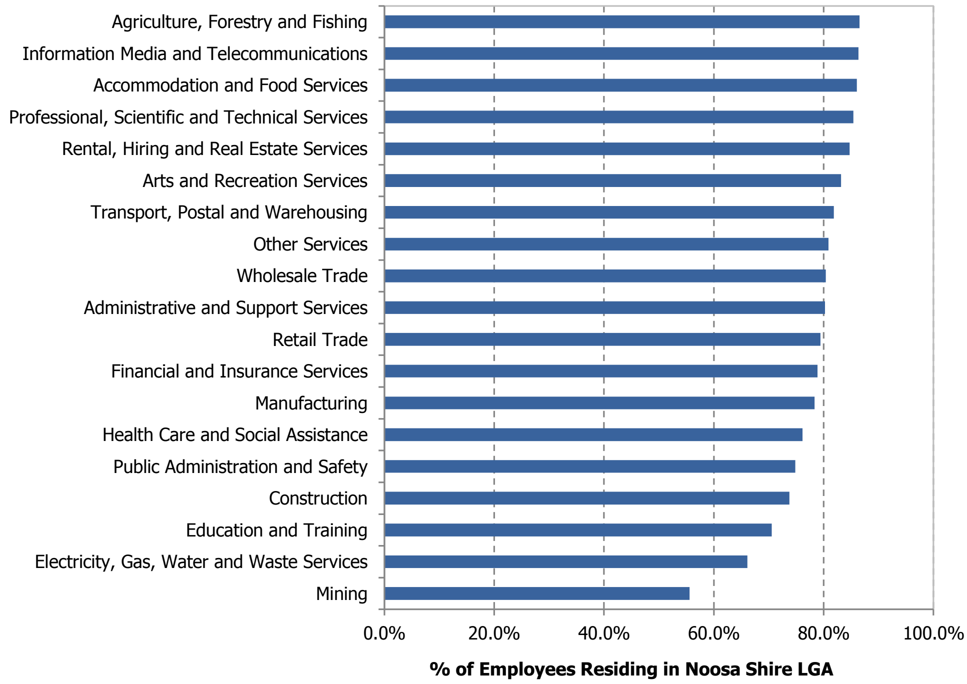
- Industries with a high proportions of local residents leaving the Shire for employment include:
  - Mining.
  - Public administration and safety.
  - Construction.
  - Electricity, gas, water and waste services.
  - Transport, postal and warehousing.
- Industries with relatively higher proportions of non-residents entering the Shire for employment inlcude:
  - Public administration and safety.
  - Construction.
  - Education and training.
  - Electricity, gas, water and waste services.
  - Mining.

Table 6.4: Persons Working in Noosa by Industry

Industry	Work in Noosa LGA		
	Live in Noosa LGA	Live Elsewhere	% Live in Noosa LGA
Agriculture, Forestry and Fishing	218	34	86.5%
Information Media and Telecommunications	177	28	86.3%
Accommodation and Food Services	2,206	358	86.0%
Professional, Scientific and Technical Services	1,112	190	85.4%
Rental, Hiring and Real Estate Services	539	97	84.7%
Arts and Recreation Services	232	47	83.2%
Transport, Postal and Warehousing	361	80	81.9%
Other Services	618	146	80.9%
Wholesale Trade	459	112	80.4%
Administrative and Support Services	548	135	80.2%
Retail Trade	2,400	623	79.4%
Financial and Insurance Services	351	94	78.9%
Manufacturing	749	207	78.3%
Health Care and Social Assistance	1,764	553	76.1%
Public Administration and Safety	387	130	74.9%
Construction	1,085	386	73.8%
Education and Training	1,153	481	70.6%
Electricity, Gas, Water and Waste Services	80	41	66.1%
Mining	20	16	55.6%
Total	**14,459**	**3,758**	**79.4%**

Note: Totals may not align due to inadequately described and not stated responses.
Source: ABS (2011)

Figure 6.14: Proportion of Employees Residing Noosa LGA



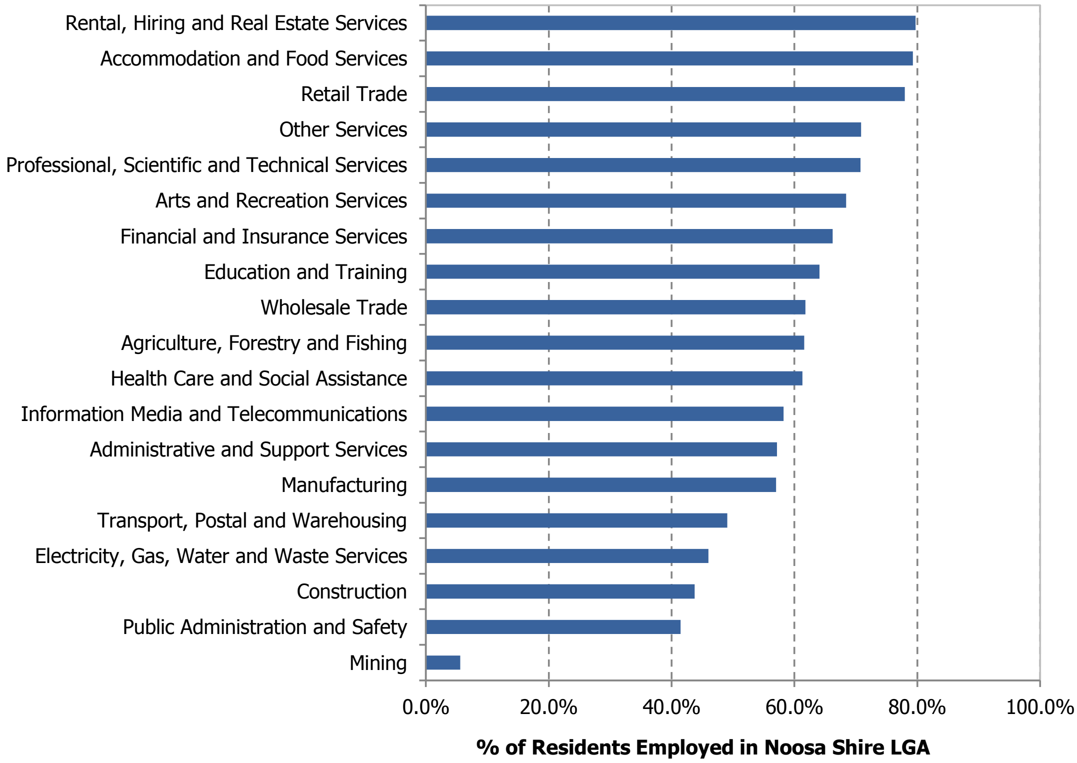
Source: ABS (2011)

Table 6.5: Noosa LGA Residents Place of Work by Industry

Industry	Live in Noosa LGA		
	Work in Noosa LGA	Work Elsewhere	% Work in Noosa LGA
Rental, Hiring and Real Estate Services	539	137	79.7%
Accommodation and Food Services	2,206	576	79.3%
Retail Trade	2,400	677	78.0%
Other Services	618	254	70.9%
Professional, Scientific and Technical Services	1,112	460	70.7%
Arts and Recreation Services	232	107	68.4%
Financial and Insurance Services	351	179	66.2%
Education and Training	1,153	646	64.1%
Wholesale Trade	459	284	61.8%
Agriculture, Forestry and Fishing	218	136	61.6%
Health Care and Social Assistance	1,764	1114	61.3%
Information Media and Telecommunications	177	127	58.2%
Administrative and Support Services	548	411	57.1%
Manufacturing	749	565	57.0%
Transport, Postal and Warehousing	361	375	49.0%
Electricity, Gas, Water and Waste Services	80	94	46.0%
Construction	1,085	1395	43.8%
Public Administration and Safety	387	546	41.5%
Mining	20	338	5.6%
Total	**14,459**	**8,421**	**63.2%**

Note: Totals may not align due to inadequately described and not stated responses.
Source: ABS (2011)

Figure 6.15: Proportion of Residents Employed Within Noosa Shire LGA



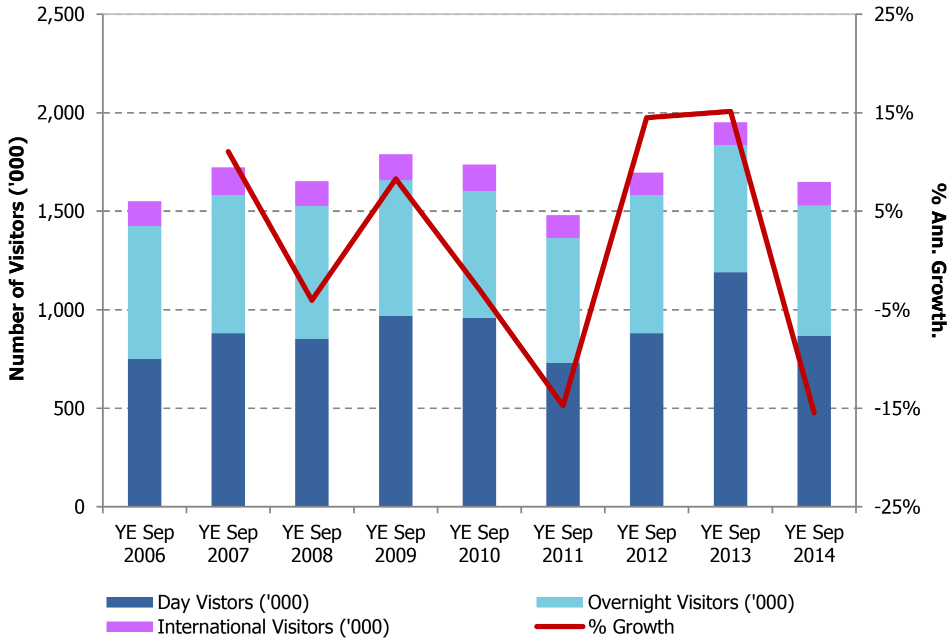
Source: ABS (2011)

7. Tourism

7.1 Visitation

- Tourism is one of the Shire's key sectors with an estimated visitor spend of $601.2 million for the year ending September 2014 (TRA 2014a and 2014b).
- Figure 7.1 shows total visitation to the Shire declined to 1.7 million (specifically 1,650,218 people) for the year ending September 2014, following strong visitation growth in 2012 and 2013. This represented a 15.5% decline from the previous year (TRA 2014c).
- Figure 7.1 shows over the year ending September 2014, growth in the domestic overnight and international markets (up 2.1% and 5.9% respectively) was offset by a large decline in the Shire's largest market, the domestic day visitor market, (down 27.1%).
- As tourism contributes a proportionately large amount to the Shire's economic activity (specifically through retail trade and accommodation and food services), a return to growth is likely to stimulate economic activity.

Figure 7.1: Tourism Visitation, Noosa Shire LGA, 2006 to 2014



Source: TRA (2014c)

7.2 Expenditure

- Table 7.1 shows tourism is one of the Shire's key sectors with an estimated visitor spend of $601.2 million for the year ending September 2014 (TRA 2015c).
- Table 7.2 shows the largest expenditures for domestic tourism is in shopping/gifts/souvenirs for domestic day trips and accommodation for domestic overnight tourism, with expenditure of $23.3 million (27% of total expenditure) and $98.2 million (24% of expenditure) respectively (TRA 2015c).

Table 7.1: Estimated Noosa LGA Visitor Expenditure (Year Ending September 214)

Visitor Type	Visitors - Year Ending September 2014	Average Visitor Expenditure ($)	Estimated Noosa Shire LGA Visitor Expenditure ($M)
Sunshine Coast Domestic Overnight	661,000	$618.73	$409.0
Sunshine Coast Domestic Day Trip	867,000	$100.39	$87.0
Sunshine Coast International Overnight	122,014	$862.00	$105.2
Total	**1,650,014**	**$364.36**	**$601.2**

Note: Expenditure totals derived from average visitor expenditure within the Sunshine Coast Region.
Source: TRA (2015c)

Table 7.2: Noosa LGA Domestic Tourism Expenditure by Category ($M)

Expenditure Category	Domestic Day Trip	Domestic Overnight
Domestic Airfares	$2.5	$59.1
Package Tours	$0.1	$13.8
Organised Tours	$0.2	$3.2
Rental vehicles	$0.3	$8.2
Petrol	$22.9	$43.8
Vehicle Maintenance/ Repairs	$0.6	$1.5
Taxi	$0.4	$6.6
Other Local Public Transport	$0.7	$2.1
Long Distance Public Transport	$0.3	$2.0
Accommodation	$0.0	$98.2
Groceries for Self-Catering	$5.6	$25.7
Alcohol, Drinks (not already reported)	$4.6	$24.5
Takeaways and Restaurant Meals	$16.9	$61.4
Shopping/ Gifts/ Souvenirs	$23.3	$33.2
Entertainment	$3.8	$12.6
Gambling	$0.4	$1.9
Education Fees	$0.0	$1.1
Convention/ Conference/ Seminar/ Trade fair	$0.0	$2.5
Other Expenditure	$4.4	$7.5
Total	**$86.7**	**$409.0**

Source: TRA (2015c)

- Table 7.3 shows the largest expenditures for international overnight tourism is in food, drink and accommodation, with an expenditure of $31.6 million at 30% of total expenditure.
- Table 7.3 shows package tours account for 11% of total expenditure, at a value of $11.8m, while education fees provide $11.5 million of expenditure for 10.9% of total expenditure (TRA 2015c).

Table 7.3: Noosa LGA International Tourism Expenditure by Category ($M)

Expenditure Category	International Overnight
Package Tour	$11.8
Pre-Paid International Airfares	$23.8
Organised Tours	$2.2
International Airfares Bought in Australia	$1.9
Domestic Airfares	$1.1
Other Transport Fares	$2.4
Self-Drive Cars, Rent-A-Cars, Campervans	$1.3
Petrol and Oil for Self-Drive Cars or Other Vehicles	$1.4
Shopping - Items for Use in Australia	$3.2
Shopping - Items to Take Home	$6.4
Total Shopping	*$9.6*
Food, Drink and Accommodation	$31.6
Horse Racing and Gambling	$0.4
Entertainment	$1.3
Motor Vehicles	$2.4
Education Fees	$11.5
Phone, Internet, Fax and/or Postage	$1.0
Other Expenditure	$1.4
Total	**$105.2**

Source: TRA (2015c)

References

ABS (2001). *Census of Population and Housing, 2001*. Cat. No. 2032.0. ABS, Canberra.

ABS (2006). *Census of Population and Housing, 2006*. Cat. No. 2001.0. ABS, Canberra.

ABS (2011). *Census of Population and Housing, 2011*. Cat. No. 2001.0. ABS, Canberra.

ABS (2015a). *Regional Population Growth, Australia 2013-14*. Cat. No. 3218.0. ABS, Canberra.

ABS (2015b). *Labour Force, Australia, April 2015.* Cat. No. 6202.0. ABS, Canberra.

ABS (2015c). *Average Weekly Earnings, Australia, Nov 2014.* Cat No. 6302.0. ABS, Canberra.

ABS (2015d). *Counts of Australian Businesses, Including Entries and Exits, June 2012 to June 2014.* Cat. No. 8165.0. ABS, Canberra.

ABS (2015e). *Building Approvals, Australia, December 2014*. Cat. No. 8731.0. ABS, Canberra.

AEC (unpublished). *AEC Gross Regional Product Model, 2012-13*. AEC, Brisbane.

Google Earth (2015). *Google Earth.* Available from: www.google.com/earth . Last Accessed 21 January 2015.

IbisWorld (2015). *Industry Research Reports*. Available from: http://www.ibisworld.com.au/industry/home.aspx. Last accessed May 29, 2015.

Noosa Shire Council (unpublished). *Data provided for the Noosa Economic Profile*. Noosa Shire Council, Noosa.

QGSO (2015). *Qld Regional Database*. Available from: www.qrsis.oesr.qld.gov.au. Last Accessed 25 May 2015.

TRA (2014a). *National Visitor Survey – Year Ending September 2014*. Tourism Research Australia.

TRA (2014b). *International Visitor Survey - Year Ending September 2014*. Tourism Research Australia.

TRA (2014c). *TRA Online Database*. Available from: http://www.tra.gov.au/tra-online.html. Last accessed May 29, 2015.

Appendix A: Businesses by Industry Division and Employment Size Ranges

Table A.1: Businesses by Industry Division and Employment Size Ranges, June 2014

Industry	Non-employing	1-4	5-19	20-199	200+	Total
Agriculture, Forestry and Fishing	232	39	12	3	0	286
Mining	10	9	0	0	0	19
Manufacturing	121	72	41	9	0	243
Electricity, Gas, Water and Waste Services	6	7	3	0	0	16
Construction	776	420	67	8	0	1,271
Wholesale Trade	130	73	32	3	0	238
Retail Trade	223	208	92	7	0	530
Accommodation and Food Services	96	137	119	29	0	381
Transport, Postal and Warehousing	148	79	21	3	0	251
Information Media and Telecommunications	55	14	9	0	0	78
Financial and Insurance Services	486	98	8	0	0	592
Rental, Hiring and Real Estate Services	973	113	54	6	0	1,146
Professional, Scientific and Technical Services	510	299	60	16	0	885
Administrative and Support Services	160	88	18	6	0	272
Public Administration and Safety	9	9	3	0	0	21
Education and Training	67	24	10	6	0	107
Health Care and Social Assistance	187	128	49	3	6	373
Arts and Recreation Services	71	25	0	6	0	102
Other Services	115	114	25	0	3	257
Unknown	102	24	4	6	0	136
Total	**4,477**	**1,980**	**627**	**111**	**9**	**7,204**

Source: ABS (2015d)

PAGE LEFT INTENTIONALLY BLANK

AECgroup

Outcome Driven

Economics, Planning & Development
Business Strategy & Finance
Community Research & Strategy
Design, Marketing & Advertising
Information & Knowledge Management