An aerial photograph of a coastal landscape. In the foreground, there is a dense forest of green trees. A wide, sandy beach curves along the coast, meeting a clear blue ocean. In the background, there are large, forested mountains under a clear blue sky. The text 'MACKAY DESTINATION TOURISM PLAN' is overlaid in large white letters across the top half of the image.

MACKAY DESTINATION TOURISM PLAN

Final Report

June 2014

Executive Summary

Tourism is both a major economic activity and lifestyle driver for the Mackay region, and visitor expenditure impacts a number of key regional economic sectors. The overnight visitor economy injects approximately **\$811 million of direct and indirect expenditure** into the destination each year, which, in turn **supports over 7,510 jobs** (direct and indirect).

To help achieve Queensland's 2020 target aspiration of doubling overnight visitor expenditure to \$30 billion, the **Mackay region will have to contribute approximately \$463M in direct expenditure** towards this target. To achieve this, a planned approach is required to harness key market segments to drive growth in the region.

The Mackay Destination Tourism Plan has been prepared to provide the **definitive direction for tourism and events in the Mackay region towards 2020**, highlighting the resources required to achieve the Queensland 2020 target, and create a sustainable and competitive tourism and events destination.

The Mackay region offers an abundance of natural attractions including national parks, gorges, the Great Barrier Reef, numerous tropical islands and beaches.

Extending from Cape Palmerston National Park and Sarina, northward to Midge Point, west beyond Eungella National Park and east to Credlin Reef, the Mackay region encompasses the local government areas of Mackay and Isaac. Its combined resident population of just over 144,000 is **largely supported by the mining and agricultural sectors of coal and sugar.**

Mackay itself is a **relaxed tropical city and regional service centre**, expanding rapidly on the back of a buoyant regional economy. The local culture, dining and the arts, makes Mackay an ideal holiday destination for those wanting to get-away from the crowds and discover the unspoilt natural wonders throughout the region. Its hinterland offers diverse cultural heritage and friendly bush towns.

Opportunities for Growth

To grow and prosper as a destination and to not only meet, but exceed its \$463M target aspiration for 2020 by \$100M (an extra \$112M from 2013 value), it is recommended that the following markets be considered as key target areas for growth of the Mackay visitor economy:

Primary:

- Visiting friends and relatives (VFR)
- Business and leisure tourism events
- Business travel (with leisure add-ons)
- Drive market
- Intrastate and interstate fly-drive holidays
- Tourers (incl. international, backpackers and bus tours)

Emerging:

- International self-drive
- Fishing & boating enthusiasts
- Mining and heritage enthusiasts
- Soft/relaxing/quiet satisfaction adventure seekers (mountain bike, motocross, diving)
- Wildlife enthusiasts (domestic and international)

By 2020 Mackay will be a community that values the liveability and vitality of its region and proudly invites visitors to explore its surprising range of leisure experiences.

- Mackay 2020 Destination Vision

Destination Priorities

The following priority strategies have been identified for the Mackay region. These priorities take into consideration the market opportunities that have the growth potential to **reach and then exceed Mackay region's 2020 target by \$100M** (an extra \$112M).

1. BUILD AWARENESS of the region's natural assets through:

- a major **marketing and publicity program** (including social media)
- itinerary and packages through a **domestic ready program**
- a review of **tourism and directional signage** (e.g. the airport welcome statement)

2. INCREASE LEISURE AIR ACCESS through:

- supporting **business events and VFR** programs
- supporting the **re-opening and investment in major accommodation and attractions** (Brampton Island, Lindeman Island, Keswick Island, Laguna Quays)

3. INCREASE AVERAGE LENGTH OF STAY through:

- supporting **new product development and expansion** of existing tours
- building operators product knowledge through a **dedicated education**

program supported by an online **induction program** / quiz and famils

- development of **new product and events** to grow the fishing, industry (mining and sugar) and heritage market niches

4. Grow BUSINESS AND LEISURE TOURISM EVENTS through:

- development and implementation of a **Tourism Events Strategy**
- **creating packages** and pre/post touring **itineraries** for delegates/ participants/ spectators
- development of **cultural tourism opportunities** through promotion of nationally significant public art trail

5. Establish a CLEAR IDENTITY FOR THE DESTINATION:

- review the **'hero experiences'** for the destination and undertake a **strategic publicity campaign**
- encourage development of products that support the **'hero experiences'** and enable access to the regions landscapes (e.g. platypus rivers, beaches with wallabies, reef island community) through a **dedicated facilitation role** in Council for **iconic projects and events**
- **engage industry** and make them brand champions



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SETTING THE SCENE

The Mackay Visitor Economy: Towards 2020

The Mackay Region is perfectly placed to not only meet, but exceed, the 2020 target of doubling visitor expenditure from \$15 billion to \$30 billion set by the Queensland Government, given the right support.

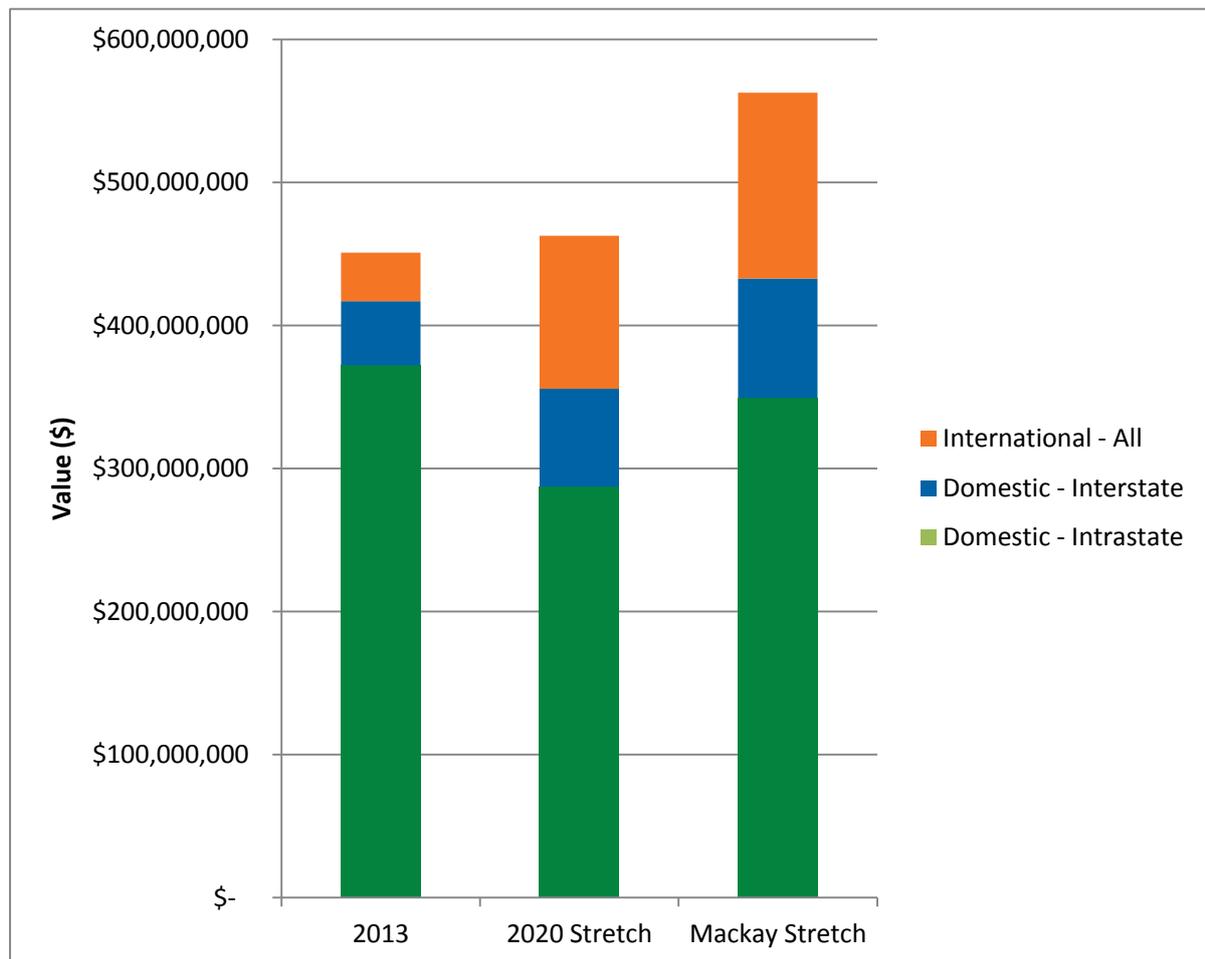
This will not be achieved through growth in the leisure market alone, it will be possible through the broader definition of the visitor economy which includes visiting friends and relatives, business visitors, event visitors (including sporting) and those who travel for a specific purpose (e.g. health, military, education).

Tourism in the Mackay region is worth approximately \$451M¹ in direct overnight expenditure, which supports over 7,400 jobs. The aim is to stretch the value of the overnight visitor economy to \$463M by 2020.

The Mackay region has the ability, with the right level of support, to exceed this target by \$100M by growing the broader visitor economy.

Figure 1 below shows the 2013 and stretch target overnight expenditure estimates by market segment.

Figure 1: Current and Stretch Target Overnight Expenditure by Market Segments



¹2013 visitor expenditure is derived from actual expenditure for the region (TEQ Mackay Snapshot YE June).

What is a Destination Tourism Plan?

Destination Tourism Planning (DTP) is the next evolution of destination management. With the emphasis and decision-making moving to the destination, a clear direction for tourism and events in that destination needs to be articulated to its stakeholders. A DTP draws on the existing reports and resources already prepared at a local, regional, state and national level.

The aim of the DTP is to provide the definitive direction for tourism and events in a destination towards 2020, highlighting the resources required to create a sustainable and competitive tourism destination. A key feature of the DTP is that it is directly linked to the State (and National) targets of doubling the value of tourism, while recognising the local challenges and opportunities of the destination's unique tourism assets, unique development, marketing and management needs. Based on available research, consultation and stakeholder feedback, and a review of existing planning, reviews and reports, the DTP builds on grass roots level support for key initiatives from local tourism organisations, tourism boards, local government, and operators.

Objectives of a Destination Tourism Plan

- Address the **needs of the broader visitor economy** in the Mackay region.
- **Complement existing Regional strategies**, including Isaac and Mackay Regional Council's Community and Economic Development Plans.
- Implement a **best practice destination tourism plan** to attract visitors to the Mackay region, distribute economic benefits to the destination and support a sustainable tourism industry.
- Recognise and **build on the unique features of the Mackay region**.
- Outline the **value of tourism and events to the wider regional economy** in terms of expenditure, jobs and industries supported by tourism and events.
- Identify **unique tourism experiences, product and event development opportunities and associated key infrastructure needs** required to meet the needs of consumers.
- Provide a **clear tourism and events marketing strategy and direction** for the Mackay region.

The difference is made by matching the unique assets and people in the tourism and event network to emerging trends and opportunities and by prioritising our efforts.



Why Prepare a Destination Tourism Plan

Tourism is recognised as one of the four pillars of the Queensland economy and a significant contributor to employment and the future economic prosperity of the State. The Queensland Government, through the inaugural DestinationQ forum in 2012, acknowledged the fundamental role of the destinations in returning Queensland to its rightful place as Australia's pre-eminent tourism destination. Each destination has its own unique experiences, opportunities and challenges and therefore each needs to set its own clear direction. That is the role of a DTP.

There are many reasons for a destination to be proactive in setting and articulating its direction and key priorities towards 2020 through a DTP, these include:

Meeting the future needs of visitors

Not only are visitor expectations constantly rising, but forecasts for Australia and Queensland suggest a significant shift in the markets each destination will have to cater for. Almost half of the forecast growth for Queensland will come from key international markets including both traditional markets (Japan and New Zealand) and emerging markets such as India and China. In addition to their origin, destinations need to respond to changing visitor needs as they become more active, adventurous, and engaged as well as shifting travel planning and booking needs.

Engaging local, regional, state and national partners

Tourism is everyone's business. The traditional tourism industry cannot achieve the vision by working in isolation. The aim of the DTP is to gain local, regional, state and national support for Mackay region's priorities based on firm understanding of its opportunities and challenges.

Demonstrate the destination's contribution to the State and National Target – Double overnight visitor expenditure by 2020

Embracing the national direction, Queensland has set an ambitious target of doubling overnight visitor expenditure to \$30 billion by 2020. Each destination has a significant role to play in achieving this target, and how that will be achieved is a clear outcome of the DTP process.

Balancing future tourism and events growth with local aspirations

Reaching, or exceeding, the target will have an impact on how the local community feels about tourism and events in their community. The future plans for tourism and events in the Mackay region needs to align and contribute to the community's aspirations and that of the organisations that represent their interests including local government, economic development organisations, chambers of commerce, industry associations, community conservations groups and others.

To get the full support of its partners – Mackay region as a destination has to articulate where it is going, why and how. That is the role of a DTP.



The Role and Economic Contribution of Tourism and Events

Tourism and events are part of the broader visitor economy which the DTP aims to grow. The visitor economy includes all leisure travel and travel associated with business, events, visiting friends and relatives, and for the purpose of health and education.

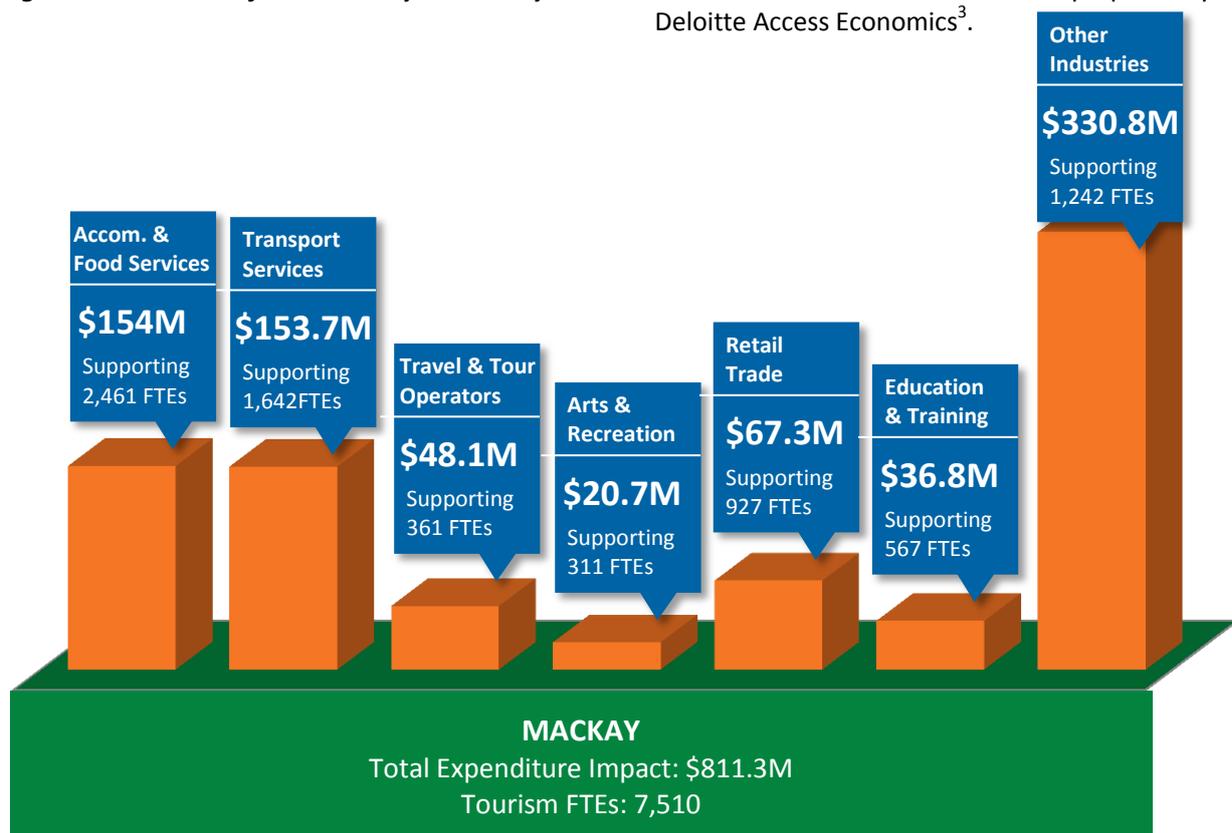
Based on estimates from the National and International Visitor Surveys, the visitor economy injects **approximately \$451 million of overnight visitor expenditure** into the Mackay region's economy. This in turn generates an estimated overall expenditure impact of **\$811 million** (direct and indirect expenditure) across sectors including transport, accommodation and food services, and retail trade.

In the Mackay region, the direct and indirect overnight expenditure supports an estimated **7,510 jobs²**, providing employment opportunities for the local population across a range of industries including accommodation, food services, education and training. Visitor expenditure also supports a range of infrastructure including restaurants, airports and cultural facilities which actively contribute to developing liveable communities.

An increase in visitation and subsequent visitor spend will have a direct positive impact on local and regional employment figures.

Figure 2 below shows the direct impact of visitors to Mackay's economy starting with direct expenditure and jobs, and where that money is spent based on estimates from the National Tourism Satellite Accounts prepared by Deloitte Access Economics³.

Figure 2: Visitor Benefits to Mackay's Economy



² Based on Access Economics estimates in the Tourism Satellite Accounts and for every \$60,863 of direct visitor spend in Queensland, one full time employee (FTE) is created or supported.

³ Visitor expenditure impact is derived from actual overnight expenditure (IVS/NVS) plus estimated indirect visitor expenditure and generated taxation revenues.

Perceptions of Tourism and Events in the Community

Visitor Perceptions

TEQ provides a Brand Equity Index to measure the perceptions that consumers hold about destinations – which ultimately affects travel behaviour. The BEI tool quantifies consumers' attitudes giving it a score out of ten. For Queensland destinations, the majority (50%) of BEI scores are under 1.0, 35% of BEI scores are between 1.0 and 3.0, 15% are over 3.0.

Amongst Queensland residents the BEI scores for Mackay is 0.6 on the scoring index where 0 is low and 4 is high. Whilst **Mackay's BEI improved since 2012 it still currently ranks low on the BEI scoring spectrum** compared to other destinations.

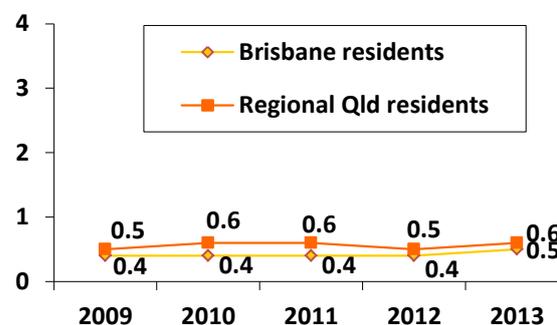
Mackay has solid awareness amongst Queensland consumers (67%) demonstrating the brand is getting noticed by some. However, there is low consideration for visitors to take a holiday in the region – this is an indication that consumers have a low understanding of what is on offer. Addressing this consideration will help address the perception that 'there is nothing to do/boring'.

However, the Mackay region has a small foundation of consumers who are emotionally loyal to the destination. Building stronger consumer loyalty goes hand-in-hand with stronger consumer commitment and consumer advocacy.

Mackay is best known for being a place where consumers can feel relaxed, have the freedom to be who they want to be, feel like one of the locals, reflect and recharge at their own pace, feel refreshed and revitalised and leave the cares of the world behind.

Queenslanders tend to see Mackay, Townsville, Southern Queensland Country and Northern NSW as having similar ideals expressed above.

Figure 3: Mackay Brand Health Index 2010-2012



Community Perceptions⁴

Overall, despite the emphasis on major employers like mining, construction and retail the locals believe that the tourism industry has a role to play in creating positive outcomes for their community.

Two in three (66%) residents also 'like' tourists. This is greater than the state average of 57%.

Table 1: Contact with Tourists, Feeling and Development

	QLD %	Mackay %
Feelings About Tourists		
I really like tourists	57	66
I tolerate tourists	31	28
I adjust my lifestyle to avoid tourists	10	5
I stay away from places tourists go	3	2
Contact With Tourists		
I never come into contact with tourists	22	16
I see tourists around but don't usually talk to them	51	50
I often interact with tourists as part of my job	10	6
I often meet tourists around town and talk to them	15	15
I have made friends with tourists during their stay but have not kept in contact	7	14
I have made friends with tourists and kept in contact after they have left	4	4

⁴ Mackay Social Indicators, Tourism and Events Queensland (2013).



ABOUT THE DESTINATION

Destination Profile

Destination Description⁵

The Mackay region offers an abundance of natural attractions including national parks, gorges, the Great Barrier Reef, numerous tropical islands and beaches.

Extending from Cape Palmerston National Park and Sarina, northward to Midge Point, west beyond Eungella National Park and east to Credlin Reef, the Mackay region encompasses the local government areas of Mackay and Isaac. Its combined resident population of just over 144,000 is largely supported by the mining and agricultural sectors of coal and sugar.

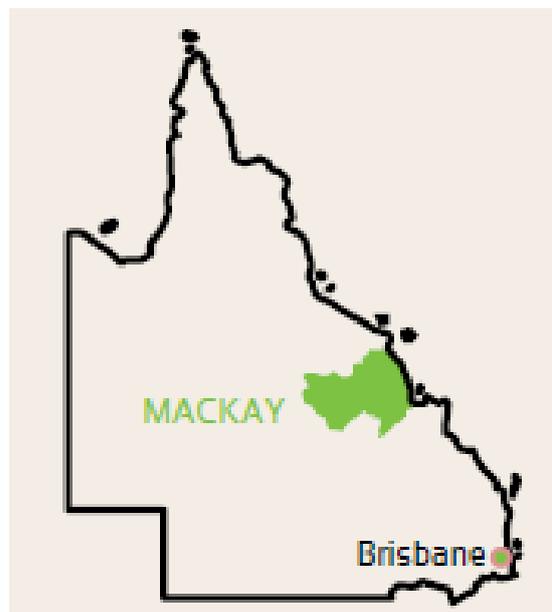
Mackay itself is a relaxed tropical city and regional service centre, expanding rapidly on the back of a buoyant regional economy. The local culture, dining and the arts, makes Mackay an ideal holiday destination for those wanting to get-away from the crowds and discover the unspoilt natural wonders throughout the region. The region's hinterland offers a diverse cultural heritage, natural landscapes and friendly country towns.

The region is readily accessible via the Mackay and Moranbah airports. The Mackay airport provides regular flight services direct to and from Brisbane, Townsville, Gold Coast, Melbourne and Sydney. The Moranbah airport provides regular direct services to and from Brisbane and Townsville.



⁵ www.mackayregion.com

Population and Dwelling Profiles for Mackay and Isaac Regional Councils, OESR (April 2012)



Competitive Strengths

The main competitive strengths of the Mackay region are:

- **Spectacular natural attractions** - National Parks, beaches and gorges
- **Native flora and fauna** – Wallabies on the beach at Cape Hillsborough and platypus at Eungella National Park
- **Mackay Entertainment and Convention Centre/Mackay showground** for exhibitions, business events and conventions
- **Diversity of experiences** across the region that visitors can discover
- **Proximity to coral reefs and island attractions** in the Great Barrier Reef
- Excellent diversity of **fishing activities**
- **Cultural heritage** and Indigenous attractions /sites
- **A wide range of business, sports and leisure events** that celebrate the region (e.g. Beach Races)
- Friendly **people & community lifestyle**
- **Relaxed and peaceful** atmosphere
- **Good air access** and linkages at Mackay airport
- A **liveable and comfortable** tropical climate

Destination Hero Experiences and Themes

A tourism 'experience' is the emotional feeling or personal achievement a visitor derives from the purchase, participation or consumption of a tourism product – accommodation, attractions or tours. The 'tourism product' is what the customer buys; the 'tourism experience' is what they remember.

In alignment with the *Mackay Region Destination Tourism Strategy 2012-2016*, three destination 'hero' experiences were developed to deliver the region's tourism vision and the 'themes' that underpin its brand.

Hero experiences are world class experiences that:

- Provide a destination with a real competitive advantage over other destinations,
- Focus on what is truly unique, memorable or engaging about a destination, and
- Meet the needs of the identified target markets.

The three themes and associated 'hero experiences' identified for the Mackay region are:

Understand why locals live here

Understand why locals live here – feel like a local and play where Mackay plays...at one of its many uncrowded beaches, reeling in a great catch on the Great Barrier Reef or at a local dam, exploring the hinterland, or just getting back to nature.



Explore hidden treasures

Be surprised by hidden treasures you discover in the Mackay region...the secretive platypus at Eungella National Park, the sight of wallabies on Cape Hillsborough beach, the seclusion of uncrowded Brampton and Keswick Islands on the Great Barrier Reef and the dynamic agricultural and mining industries.



Businesses, leisure, cultural and sports events that celebrate the region

Experience the vitality of a vibrant and diverse community through events at one of the region's variety of cultural facilities, expanding sports venues and a growing list of community celebrations.



Please Note: An action item for this DTP is to review these Hero Experiences to ensure these are still relevant to the destination towards 2020.

Destination Vision and Brand

The 2020 Destination Vision for Mackay is:

By 2020 Mackay will be a community that values the liveability and vitality of its region and proudly invites visitors to explore its surprising range of leisure experiences.

By 2020 Mackay will be:

- *a community that proudly invites visitors to explore its stunning natural attractions;*
- *an industry that is engaged, innovative, bold, profitable and passionate that up-sells their experience and other local experiences;*
- *a brand that is well recognised, respected, the envy of other regions and encourages visitors to stay and enjoy without losing the relaxed country-values; and*
- *blessed with even more experiences that help to set it apart and include it on the bucket lists of more Australian and international travellers.*

The destination could be:

- *on every Australian's bucket list for one of our personal natural encounters;*
- *an outdoor activities hub of Queensland whilst protecting nature;*
- *Queensland's most enviable riverfront tourism destination outside of Brisbane, showcasing Mackay's world class public art trail;*
- *the recreational fishing capital of Australia; and*
- *first choice for the 400km drive market to connect with family and nature.*

Destination Brand

The Mackay region marketing falls under Mackay Tourism Limited brand. A new core brand and creative are under development.

Matching Brands to Markets

The brand message delivered to a target market differs depending on how far away the market is from the destination. As a rule of thumb, the further away a customer is from the destination, the larger the area they are aware of. The exception of this rule is where they are travelling for a specific purpose (VFR, business, special interest) in which case they will know a particular location by name (see Figure 4 on page 15).

The core brand promise used in a campaign is not designed to exclude other brands, but to identify how the key elements of the region's broad range of visitor experiences contribute to the broader Queensland brand family. The resulting marketing activity aims to maximise overall growth opportunities for the region and needs to leverage the brand with the greatest awareness and retention.

Recognising that the operators of the Mackay region have a number of strong brands they can leverage, depending on the market into which they are promoting their product, the following matrix (Table 2 on page 15) provides a guide on which markets the destination will seek to leverage in each market.



Figure 4: Google Trends (Search Popularity)

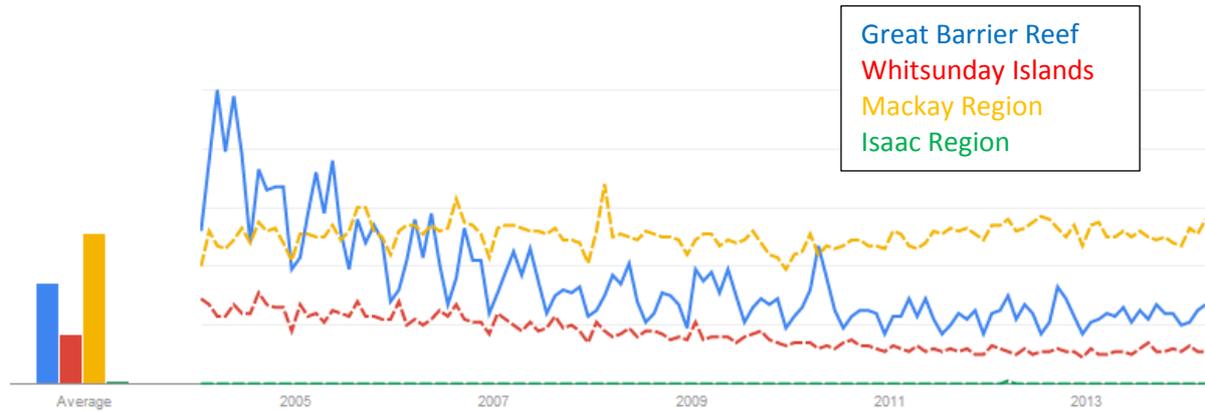


Table 2: Brand Messages by Market

	Locals/ VFR	400km drive	Intrastate (Qld)	Interstate (fly/drive)	Interstate (long drive)	Inter- national
Great Barrier Reef, Qld				✓	✓	✓
Whitsundays				✓	✓	✓
Mackay Region	✓	✓	✓			
Isaac Region	✓	✓				
Bruce Hwy / Pacific Coast Touring Route					✓	
Great Inland Way					✓	



Competitor Analysis

A comparison of Mackay against other destinations on its **three hero experiences** identifies the direct competitor destinations or which competitor destinations have similar 'experience' offerings (Table 3 on page 17).

In the domestic arena, Mackay competes with other 'Connector' destinations in Queensland and NSW for the leisure market.

In the international market, Mackay does not have a strong profile. It leverages off the Great Barrier Reef through facilities on Keswick Island – but these are not as well-known as other prominent islands in Queensland such as Hamilton Island or One & Only Hayman Island Resort. The Pacific Coast Touring Route and Great Inland Way also gives Mackay a small profile to the international drive market.

Direct competitor destinations for specific market segments have also been identified for the Mackay region:

Leisure

Primary

- Rockhampton
- North and Central Coast NSW
- Townsville
- Whitsundays/Airlie Beach (long-haul drive)

Secondary

- Fraser Coast
- Sunshine Coast/Gold Coast
- Cairns

Business Events

Primary

- Townsville
- Gladstone
- Rockhampton
- Cairns

Secondary

- Newcastle
- Brisbane
- Whitsundays
- Toowoomba

Mackay needs to continue to partner with its neighbours (such as Townsville, the Whitsundays and Rockhampton) to gain some market share and ensure its own 'hero experiences' stand out against its competitors by meeting global best practice in terms of marketing strategies for continued visitation growth.

Competitive Advantages of the Mackay Region

Primary

- Wildlife encounters – spot a platypus, see wallabies on the beach.
- Modern events infrastructure (Stadium Mackay, MECC, Mackay showground) with capacity for significant regional events.
- Family friendly beaches for the short-break market travelling from 200-400kms away.
- Unique festivals and events.
- A destination for discoverers.
- Great Barrier Reef islands.
- Unique beaches and rainforests (Cape Hillsborough – wallabies on the beach).

Secondary

- Diversity of fishing (outer reef to inland dams and everything in between).
- Access to experiences on one of only two blue rivers (Pioneer River) in Queensland.
- Diverse cultures with related events.
- Eungella National Park is home to Australia's longest stretch of sub-tropical rainforest where you can escape the crowds, experience the rainforest and view a platypus in the wild. .
- Soft adventure activities (mountain bike trails, forest flying, dive sites, hang gliding, cable-ski, etc.).
- Sugar and mining industry tourism experiences.
- Food tourism and local produce.
- The Bluewater Trail and CBD with an expanding quota of large scale and nationally significant public artworks.

Table 3: Competitor Analysis against the Hero Experiences

Destination	Understand why locals live here	Explore hidden treasures	Business, leisure, sports events	
			Business events / conferences	Sporting / recreational events
Mackay	✓	✓	✓	
Capricorn	✓	✓		
Bundaberg	✓	✓		
Fraser Coast	✓	✓		
Gladstone	✓	✓		
Sunshine Coast				✓
Coffs Harbour	✓	✓		✓
Port Stephens			✓	✓
Central Coast	✓	✓		✓
Townsville			✓	✓



Delivering Community Vision through Tourism and Events

Whilst mining, sugar, construction and related industries are dominant in the Mackay region, tourism and events still provide a healthy contribution to the local economy. As an industry it is recognised in a number of corporate strategies to direct planning, economic and social outcomes⁶.

At a local level tourism is identified as playing an important role in **supporting the region's industry and business sectors**:

- This is reflected in the *Mackay Regional Council Community Plan 2011-2031*. It identifies the role of Council to develop and promote tourism to support the region's business and industry sectors.
- The *Mackay Regional Council Corporate Plan 2009-2014* also identified economic development (which includes tourism) as a corporate objective to broaden the region's economic base.
- The *Isaac Region Community Plan: 2020 Vision 2009-2019* identifies tourism as a major growth tool for the region. Priorities to attract tourists into the community include increasing directional and tourism signage (especially on the major tourist routes of Bruce Highway and Great Inland Way), implement strategies to maximise sustainable eco/ heritage/ industrial tourism, and brand and promote significant facilities and projects that are completed. Tourism is seen as a way to improve the economy of the Isaac region.

At a regional level **the tourism direction** has been clearly articulated in:

- The *Mackay Region Hero Experiences Fact Sheet, 2013*, identifies the vision, core promise, hero experiences and themes for the region.
- **Seven catalyst projects** have been identified in the *Mackay Tourism Opportunity Plan 2009 – 2019*. These projects are tourism investment or infrastructure projects of regional significance which are expected to

act as a catalyst to generate a range of other investment, marketing and product development opportunities. They are:

- **Eungella and Pioneer Valley Tourism Node**
 - **Mining Trail** – incorporating the copper trail from Clermont to St Lawrence
 - **St Lawrence Accommodation, Retail and Conference Facility** – a community and tourist multipurpose facility
 - **Major Fishing Event Infrastructure** – provision of event infrastructure including beach, offshore and deep water fishing
 - **Tourism Skills Training** – addressing the skills shortages in the tourism sector through leveraging off the proposed merger of Central Queensland University Mackay Campus and Central Queensland TAFE in Mackay
 - **Mackay Regional Integrated Transport Program** – an integrated transport network incorporating all modes of transportation with seamless connections
 - **Mackay Tourism Events** – maintain and grow tourism, cultural and sport events throughout the region.
- The *Your Vision – Diversify Mackay Forum Results February 2014* outlines eleven key opportunities for the region as well as their long term visions, challenges, feasibilities, short term actions and leaders. The opportunities are:
 1. Mackay Airport/Seaport – To become Central Queensland's multi-modal transport hub that is viable in the long term, and to have world-class facilities for import and export to support growth and value-adding products and services.
 2. Food Bowl – Provide sustainable, innovative, quality and traceable agriculture food industry.
 3. Liveability – Mackay- the place to be
 4. Tourism – Mackay delivers coordinated high-quality and exponential boutique

⁶ Please note – this is not an exhaustive list of the region's corporate strategies, rather a highlight of some of the key documents that link to tourism.

experiences to targeted markets locally, nationally and internationally, capitalising on events, local sports, and community groups to host nationally recognisable events to grow our local economy.

5. Mining services, Technology & Agriculture – The World Leaders- Global knowledge base for agriculture and energy minerals in technology and innovation.
6. Higher Education – To be a leading provider of technology, innovation and training to the mining, agriculture and social industries.
7. Defence – To establish Mackay as the Defence support provider of preference by 2025.
8. River Front – To develop the river into a hub for locals and tourists via marine transport river experiences, the harbour, as well as accommodation, dining experiences and attractions.
9. Healthcare – A healthy community supported by first class health services.
10. Energy - Create a viable biomass industry for the Mackay Whitsunday region.
11. Manufacturing – Local sustainable manufacturing industry making things that people want.

The list above form the genesis of the key directions that Mackay aims to achieve in the long term to further create a prosperous world-class city. It should be noted that this is a preliminary document only and captures the outcomes of the forum. The identified opportunities are to be further fleshed out in a more formal Diversify Mackay document.

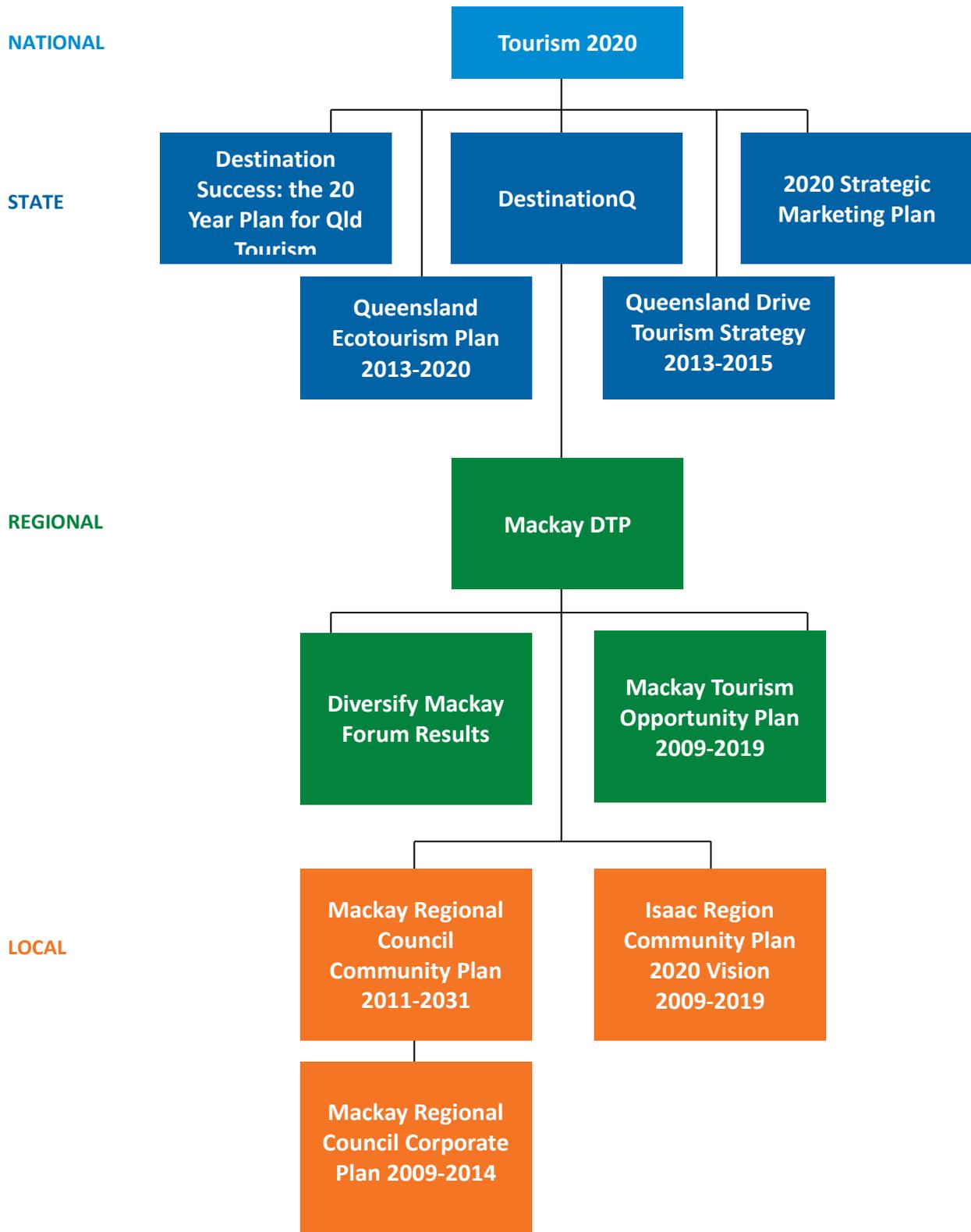
- A *Mackay Business Events Audit* report was prepared in 2013 which was based on existing and potential Business Events (BE) products in the region and a review of

Mackay's capability and offering for the BE market. The audit was designed to identify products that relate to the BE sector, as well as identify any areas that might not meet current marketplace expectations in product availability, diversity of experience or service delivery. This was done as Mackay wishes to grow its market-share of BE and broaden its product offering to include market-ready off-site function locations, team-building activity options and social programme activities. The key Mackay BE precincts discussed within this report were Mackay CBD, Northern Beaches & Marina, and Pioneer Valley, as well as some recommendations on ways in which these precincts could attract more visitors. The key outcomes and recommendations from this report were mainly centred on destination brand & positioning, destination cohesion, limited BE & destination awareness within Mackay, negligible sales & marketing undertaken, and low marketplace awareness of Mackay. This report focuses on the current and potential growth of the BE tourism market of Mackay, and suggested ways in which this growth can be achieved.

The State priority of doubling the value of tourism by 2020 (which builds on the Federal target) is supported by:

- The *Destination Success: the 20 Year Plan for Queensland Tourism* and the outcomes of *DestinationQ* around **investment facilitation** and attraction, **nature-based tourism**, the **drive market** (including the *Queensland Drive Tourism Strategy 2013-2015*), and the **important role of events** (*2020 Strategic Marketing Plan*).
- The *Queensland Ecotourism Plan 2013-2020* provides a clear direction for **investment in facilities on parks** and for Queensland to regain its position as the number one ecotourism destination through **world-leading interpretation** and presentation.

Figure 5: Alignment with Local, Regional, State and National Plans





MARKET OPPORTUNITIES

Current Visitor Profile

Visitors

This past year (YE June 2013), the Mackay Region received approximately **749,000 domestic overnight visitors**. This represents an average **9% increase** in domestic overnight visitors in the last three years.

The region also received **977,000 domestic day trip visitors** in YE June 13 (TEQ, 2013).

In terms of international visitors, the Mackay region saw **44,000 international visitors** this past year (YE June 2013), noting a 6% decline in visitation from 2008.

Visitor Nights

In the Year Ending June 2013, domestic overnight visitors to the Mackay Region stayed a total of **2.4 million nights**. In this same period international visitors stayed for a total of **753,000 nights**.

Origin of Visitors

Domestic overnight visitors are **primarily intrastate** (90%), with the majority of these visitors from **regional Queensland** (72%).

All domestic **day trip** visitors are from **regional Queensland**.

The top three international visitors to Mackay are **New Zealand, the United Kingdom and Germany** (Table 4).

Table 4: International Markets to Mackay

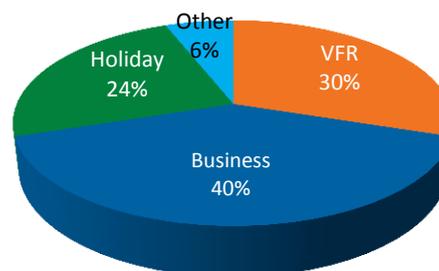
Country of Residence	% of Int. Visitors to Mackay
 New Zealand	25%
 United Kingdom	14%
 Germany	9%

Purpose of Visit

The primary purpose of visit for domestic overnight visitors is for **business followed by visiting friends and relatives (VFR) and holiday**. On the other hand, the primary purpose of visit for International visitors is a mirror image of the

domestic market with holiday being the primary motivator followed by VFR and then business.

Figure 6: Purpose of Visit – Overnight Visitors (domestic and international combined)



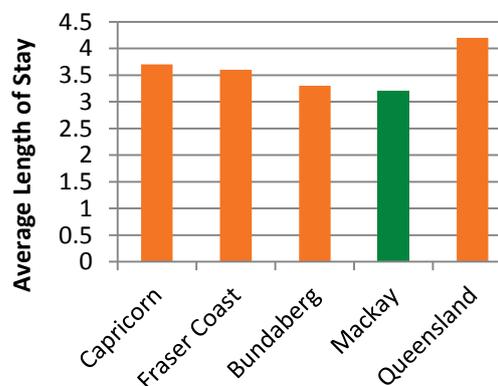
Expenditure

According to the latest research from Tourism Research Australia⁷ for Mackay, the average nightly expenditure for **domestic overnight** visitors is **\$146**. This is significantly **lower than the State average** of \$181. There is no information available on the average nightly expenditure of international visitors.

Average Length of Stay

The average length of stay (ALOS) for **domestic** overnight visitors to the Mackay Region is **3.2 days** (YE June 2013) and has decreased by 5% over the past five years. This is lower than competitors Fraser Coast (3.6), Bundaberg (3.3) and Capricorn (3.7) as well as the State average (4.2).

Figure 7: Domestic ALOS vs. Competitors



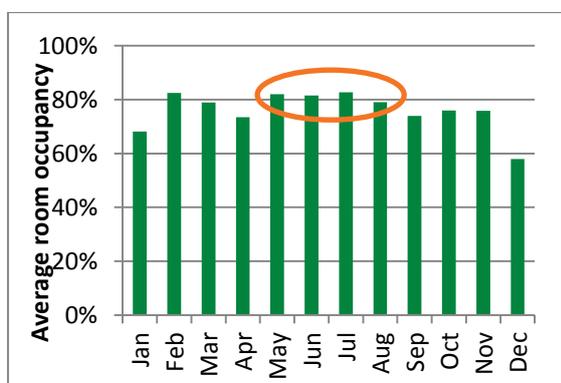
⁷ Regional Tourism Profiles 2011/12

International ALOS for Mackay is **17.1 days** and has increased significantly by 28%p.a. since 2008. This is much higher than other competing destinations such as Gladstone (10.4) however it is still lower than the State average of 22.3 days.

Seasonality

Accommodation data from the Australian Bureau of Statistics (ABS) for the Mackay Region indicates a mild seasonality pattern in room occupancy. **Winter generally has the highest occupancy with some lower occupancy over the summer months.**

Figure 8: Average Room Occupancy 2012



Activities

Eating out at restaurants is the most popular activity for domestic overnight and international visitors to the Mackay region. This is followed by **visiting friends and relatives for domestic** visitors and **sightseeing/looking around for international** visitors.

Data suggests a preference towards social and nature-based activities in both markets.

The following figures highlight the top ten activities for each market.



Figure 9: Top Ten Domestic Overnight Activities (YE June 2013)



Figure 10: Top Ten International Activities (YE June 2013)



Market Opportunities

Visiting Friends and Relatives (VFR) becomes a key market opportunity when considering 30% of all overnight visitors come to the Mackay region to visit friends and relatives. A small increase in the percentage of locals that invite relatives to stay or in the length of stay by visitors could dramatically impact on the value of the visitor economy.

Business and Leisure Tourism Events are a growing trend nationally, with business events being the highest daily yield of any sector of the visitor economy. With only 5% of visitors travelling to the region for business or leisure tourism events, there is potential for this to grow as well as provide the perfect opportunity for mid-week visitation and dispersal.

Business Travel is already a significant market for the Mackay region, with 40% of all overnight visitors to region coming for business purposes. Developing a series of leisure add-on experiences to this market that would increase spend and average length of stay has the potential to make a significant impact on the region's visitor economy.

Drive Tourists accounts for 64% of all domestic overnight visitors to the Mackay region. Signage and wayfinding improvements could help to increase access and dispersal within the region and grow intrastate and interstate fly-drive markets, as well as touring (including backpacker and bus tours) and international self-drive markets.



Niche Markets including fishing, boating, industry, heritage, adventure and wildlife represent opportunities for growth from a low base. In 2013 less than 10% of all domestic and international visitors came to the Mackay region and participated in these activities. Also, with *eating out at restaurants* being the most popular activity undertaken by visitors to the region, an expansion of food and agriculture experiences would help to support growth in this niche area.

Travel for a Purpose is an often overlooked market segment, but the Mackay region attracts around 2% of total overnight visitors who come for cultural tourism, health or education travel. With proper investment in both areas, this could be a growth potential for the region and could provide an opportunity to increase mid-week visitation.

Key Growth Opportunity Market Segments for the Mackay region:

Primary:

- Visiting friends and relatives (VFR)
- Business and leisure tourism events
- Business travel (with leisure add-ons)
- Drive market
- Intrastate and interstate fly-drive holidays
- Tourers (incl. international, backpackers and bus tours)

Emerging:

- International self-drive
- Fishing & boating enthusiasts
- Mining and heritage enthusiasts
- Soft/relaxing/quiet satisfaction adventure seekers (mountain bike, motocross, diving)
- Wildlife enthusiasts (domestic and international)

Market Segments

International

Tourism Australia has defined its international target market as the **'Experience Seeker'** who are globe trotters looking for authentic interactions, brag-able locations to get off the beaten track and to immerse themselves in local culture. Experience Seekers are Australia's highest yielding international market and are **more likely increase to their length of stay and average spend** in comparison to others.

To promote the vast array of unique Australian adventures to this target market, seven key Australian Experience Themes have been identified:

1. Nature in Australia
2. Aboriginal Australia
3. Journeys
4. Outback Australia
5. Australian Coastal Lifestyle
6. Australian Major Cities
7. Food & Wine

Internationally the Mackay region offers products that deliver on four of the seven experience themes (excludes Aboriginal, Major Cities and Food and Wine).

Domestic

Tourism and Events Queensland's (TEQ) extensive research into the domestic market has defined six market segments based on visitor needs and wants giving valuable insight into consumers' emotional connection to what they expect from a holiday.

These market segments are seeking experiences that Queensland can offer under the following experience themes:

1. Natural Encounters
2. Queensland Lifestyle
3. Islands and Beaches
4. Adventure

The Mackay region offers experiences that deliver on all four of the primary Queensland experience themes but none are exclusive to the region. The challenge remains to carve out a unique selling point in the same way other destinations (Bundaberg turtles, Whitsunday island luxury, etc.) have been established.

Connectors and Social fun-seekers are Queensland's two primary target markets and when combined, they represent 57% of the Australian population.

MACKAY TARGET MARKETS

Tier One

- Connectors in Regional Queensland and Brisbane (400km radius of Mackay)

Tier Two

- Social fun-seekers in Sydney and Melbourne
- United Kingdom, New Zealand

Tier Three

- Europe (Germany, France)

New and Developing

- China

Connectors – Connectors see holidays as a chance to connect with people they care most about. They will often subordinate their own preferences in terms of activities to ensure everyone has a good time.

Social fun-seekers – For this market, the essence of a holiday is having a fun time. While they do a lot of different activities, it is sharing the experience with friends and other holiday makers that makes the difference.



TOWARDS 2020

Vision and Goals

Our Vision

The 2020 Destination Vision for Mackay is:

By 2020 Mackay will be a community that values the liveability and vitality of its region and proudly invites visitors to explore its surprising range of leisure experiences.

Our Goals

1. Build awareness **of the region's natural assets through a major product, marketing and publicity program (including social media).**
2. Retain and potentially **increase air access** through supporting business events and VFR programs to keep seat occupancy high.
3. **Increase average length of stay** from 3.2 nights to 4.5 nights through supporting new product development and encouraging dispersal.
4. Be known as a major competitor in regional **business and leisure tourism events** with growing visitor numbers to support accommodation bookings and create a balanced portfolio of markets.
5. Establish a **clear identity for the destination** that embraces natural encounters, the city and the region's coastal and hinterland towns.



What Does the Future Hold?

CSIRO and the Queensland Government recently identified seven megatrends that are likely to shape the Queensland Tourism sector to 2033. The seven megatrends and just some of the implications for the Mackay region are:

1. The Orient Express

The world economy is shifting from west to east and north to south. This is creating new markets and new sources of competition.

Implications for Mackay

Asian visitors currently make up a very small proportion of visitors to the Mackay region. If the region is to capitalise on the anticipated national growth, it must have a clear Asian market strategy including:

- The need to build understanding and awareness of their needs,
- More businesses being 'international-ready',
- Setting up direct or connecting flights to Asia from the Mackay region.

2. A Natural Advantage

In a world where ecological habitats are disappearing the unique natural assets of Queensland will become a stronger drawcard.

Implications for Mackay

Mackay needs to develop tourism experiences in natural areas that are unique and differentiated from competitors to take advantage of this trend.

3. Great Expectations

Tourists of the future will have expectations for authentic and personalised experiences often involving social interaction.

Implications for Mackay

Mackay businesses need to respond to the challenge and deliver quality service and experiences.

4. Bolts from the Blue

Climate change and infectious disease outbreaks combined with safety concerns will have an increased impact.

Implications for Mackay

Businesses and tourism managers need to monitor opportunities and be ready to respond to these unforeseen events, with imaginative marketing, packaging and pricing offers.

Businesses and destination managers need to be 'disaster-ready' and have resilience plans in place.

5. Digital Whispers

People are changing the way they access and trust information in an online world.

Implications for Mackay

The region needs to embrace a multichannel approach to communication and promotion. This includes building business skills and capacity and delivering new virtual travel/experiences in the form of providing rich information

6. On the Move

Humanity is increasingly mobile from trade, business, events, education and healthcare with people travelling further and more frequently.

Implications for Mackay

Maintaining air capacity is key to maximising the potential of this trend. Connectivity of Mackay airport is crucial and to a lesser extent the regional airport in Moranbah.

7. The Lucky Country

Australia and Queensland are increasingly wealthy, but expensive destinations gifted with cultural and demographic diversity.

Implications for Mackay

The need to compete on quality, experience and service will have implications for investment and development decisions, and destination and business levels.

Destination 2020 Target

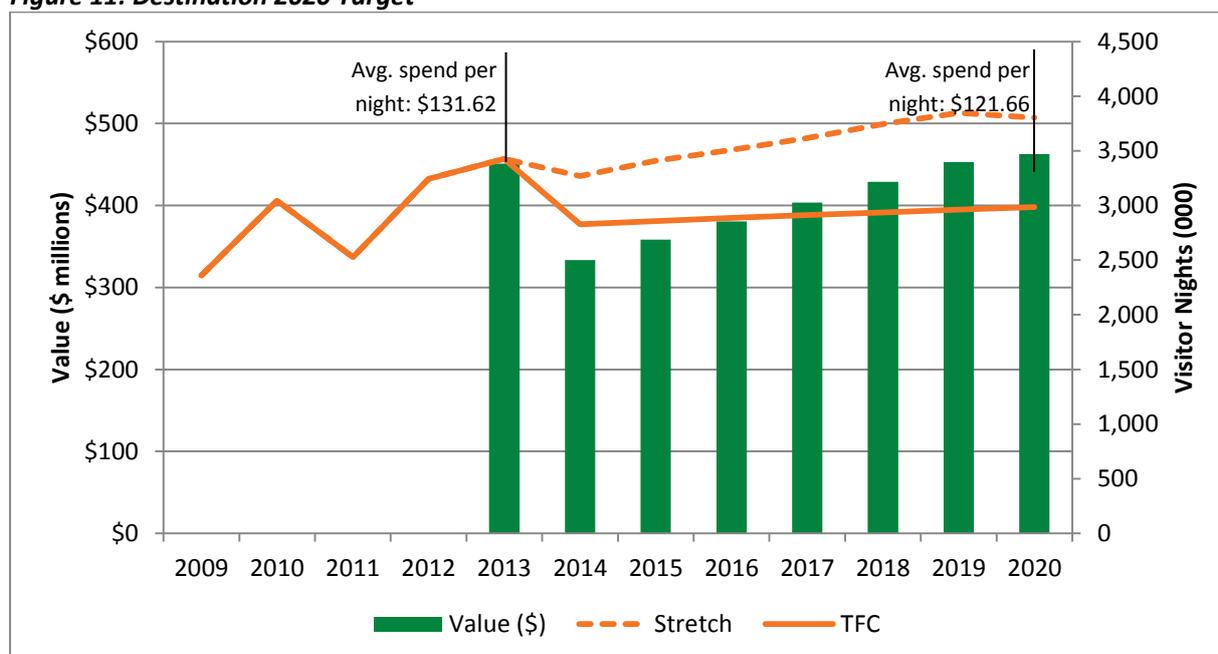
To help achieve Queensland's 2020 target aspiration of doubling overnight expenditure to \$30 billion, the Mackay region will have to contribute approximately \$463 million towards the 2020 target. In order to do this, key market segments need to be harnessed to drive growth in the region.

Table 5 below identifies the market mix for the Mackay region and how these will play a role in achieving the 2020 target aspiration. Market figures have been identified based on the Deloitte Access Economics forecasts for Queensland and the Mackay region, and are based on the assumption that the region's markets will grow proportionately to State market forecasts based on the region's current market share. As you can see in Figure 11, the Mackay region is currently exceeding its 2013 stretch forecasts. This is believed to be due to the fact that the business sector is spending more than originally assumed in forecast estimates for the region.

Table 5: Key Market Segments Towards Achieving the 2020 Target

	Current spend (YE June 2013)	2013 Stretch Target	2020 Stretch Target	Current vs 2020 Target
Intrastate (QLD)	\$ 372,036,220	\$ 198,633,419	\$ 287,227,828	\$ 84,808,392
Interstate	\$ 44,963,780	\$ 47,526,942	\$ 68,724,892	-\$ 23,761,112
TOTAL DOMESTIC	\$ 417,000,000	\$ 246,160,360	\$ 355,952,720	\$ 61,047,280
New Zealand	\$8,415,675	\$ 15,607,341	\$ 26,674,032	-\$ 18,258,357
United Kingdom	\$ 4,590,368	\$ 8,513,095	\$ 14,549,472	-\$ 9,959,104
Germany	\$ 3,060,245	\$ 5,675,397	\$ 9,699,648	-\$ 6,639,403
USA	\$ 2,295,184	\$ 4,256,548	\$ 7,274,736	-\$ 4,979,552
France	\$ 2,295,184	\$ 4,256,548	\$ 7,274,736	-\$ 4,979,552
Remaining International	\$ 13,006,043	\$ 24,120,436	\$ 41,223,504	-\$28,217,461
TOTAL INTERNATIONAL	\$ 33,662,700	\$ 62,429,363	\$ 106,696,129	-\$ 73,033,429
TOTAL	\$ 450,662,700	\$ 308,589,724	\$462,648,850	-\$ 11,986,149

Figure 11: Destination 2020 Target



*Please note that actual Expenditure data is not able to be found from 2009-2012.

Destination Growth Priorities

The following priority strategies and supporting actions have been identified for the Mackay region. These priorities take into consideration the market opportunities identified on page 24 that have the growth potential to **reach and then exceed Mackay region's 2020 target by \$100M**. They are also developed further, with specific strategies identified as catalyst projects and enablers of success that will support them, later in the document.

STRATEGIC PRIORITY	DESIRED OUTCOME
<p>1. BUILD AWARENESS of the region's natural assets through:</p> <ul style="list-style-type: none"> • a major marketing and publicity program (including social media) • itinerary and packages through a domestic ready program • a review of tourism and directional signage (e.g. the airport welcome statement) 	Lift awareness and drive conversion from existing intrastate 'preferrers' to grow an additional 2% share of the nature-based market
<p>2. INCREASE LEISURE AIR ACCESS through:</p> <ul style="list-style-type: none"> • supporting business events and VFR programs • supporting the re-opening and investment in major accommodation and attractions (Brampton Island, Lindeman Island, Keswick Island, Laguna Quays) 	Increase the regions share of interstate fly-drive holidays by 1%
<p>3. INCREASE AVERAGE LENGTH OF STAY through:</p> <ul style="list-style-type: none"> • supporting new product development and expansion of existing tours • building operators product knowledge through a dedicated education program supported by an online induction program / quiz and famils • development of new product and events to grow the fishing, industry (mining and sugar) and heritage market niches 	Increase the stay of existing business visitors from 3.2 nights to 3.7 nights AND Grow the regions share of the fishing, industry and heritage markets by 2%
<p>4. Grow BUSINESS AND LEISURE TOURISM EVENTS through:</p> <ul style="list-style-type: none"> • development and implementation of a Tourism Events Strategy • creating packages and pre/post touring itineraries for delegates/participants/spectators • Development of cultural tourism opportunities through the promotion of nationally significant public art trail 	Increase the region's share of the business events and leisure events markets by 2%
<p>5. Establish a CLEAR IDENTITY FOR THE DESTINATION:</p> <ul style="list-style-type: none"> • Review the 'hero experiences' for the destination and undertake a strategic publicity campaign • Encourage development of products that support the 'hero experiences' and enable access to the region's landscapes (e.g. platypus rivers, beaches with wallabies, reef island community) working with a dedicated facilitation role in Council for iconic projects and events • Engage industry and make them brand champions 	Leverage the existing well-known brands (GBR & Whitsundays) and create a clear destination identity that drives awareness and conversion from international self-drive and interstate drive leisure visitors to grow the regions share by 1%

Catalyst Projects

To support the destination strategies the following catalyst projects have also been identified:

1. Through a **Business Events Advisory Group and Tourism Events Advisory Group**, lift the profile and increase the promotion of events, acquire new events, and support the growth of business events, aiming to increase stay in the region leveraging its natural and cultural assets.
2. Use **publicity and cooperative marketing** to lift awareness of the experience the region can be famous for: unique events, wildlife encounters, fishing, adventures in the rainforest, coastal and hinterland towns, liveable tropical climate, sugar and mining.
3. Explore and investigate the three remaining projects from the Tourism Opportunity Plan:
 - a. **Mackay Riverfront** development – through a master plan and river access plan;
 - b. **Eungella Tourism Precinct**– through a private investment feasibility, planning scheme review and EOI; and
 - c. **Region-wide fishing event infrastructure** – to support a whole-of-region fishing event in multiple locations across Mackay and Isaac Regional Council areas.
4. Strengthen and **expand air access** to and from the region, focusing on the Sunshine Coast, Gold Coast, Darwin, Newcastle, Melbourne and Sydney connectivity through route development, marketing, packaging and market development.
5. Create an in-house **Experience Development program** and encourage the development of new stories, new products and new tours.
6. **Product clustering** to build visitation from niche markets (fishing, touring, adventure, mining, regional produce) and support new product development and product enhancement.
7. Continue the **mentoring of operators** around the domestic travel trade distribution system (i.e. contracting with wholesalers) to enable the creation of a series of fly-drive packages for the region, leveraging the available accommodation and cheap flights (in on Friday and out on Sunday).



Contribution of Strategies to the 2020 Target

The following priority strategies and supporting actions have been identified for the Mackay region to help **reach and then exceed Mackay region's 2020 by \$100M**. These priorities align with the analysis conducted within the plan and are supported by the Enablers of Success found on page 35.

Priority	Desired Outcome	2020 Value	Contribution to Target	Additional Value
1. Build Awareness of the region's natural assets	Lift awareness and drive conversion from existing intrastate 'preferrers' to grow the nature-based market by 2%.	\$21,274,036	5%	\$16,390,036
2. Increase leisure air access	Increase the region's share of interstate fly-drive holidays by 1%.	\$8,423,003	2%	\$7,475,003
3. Increase ALOS	Increase the stay of existing business visitors by 0.5 days.	\$178,665,522	39%	\$24,143,989
	Grow the region's share of the intrastate fishing, industry and heritage markets by 2%.	\$36,431,024	8%	\$26,515,024
4. Grow business and leisure tourism events	Increase the region's share of business and leisure events markets by 2%.	\$52,238,666	11%	\$31,120,052
5. Establish a clear identity for the destination	Leverage the existing well-known brands and create a clear destination identity that drives awareness and conversion from international self-drive and interstate drive leisure visitors to grow the region's share by 1%.	\$10,987,115	2%	\$6,188,500
TOTAL CONTRIBUTION TO 2020 TARGET				\$111,832,604

*It is envisioned that the remainder of the 2020 target value will come from VFR and Travel for Purpose markets which will grow at TFC growth rates.



Implications of Growth

Mackay is well on track to hit its 2020 growth target and currently contributes more than 3.1 million visitor nights to the State target. However, additional visitor nights are still required to meet the 2020 target and these may have implications for:

Access

Additional visitor volumes may have implications for road congestion at peak times, but also support additional air access which will result in infrastructure needs. Pedestrian footpath and parking issues may occur in hotspots at peak times requiring additional visitor management techniques.

Accommodation

Based on data from the Australian Bureau of Statistics - Survey of Tourist Accommodation (2000-2013) for Hotels, Motels and Serviced Apartments the room occupancy of Mackay has ranged between 68% - 80% over the last three years.

Further accommodation capacity may be required to support an increase in visitors to the region. The type of accommodation must also be aligned to the type of visitor e.g. holiday and leisure accommodation compared to facilities that cater for the business travellers.

Attractions

The projected increase in visitor numbers will need to be accommodated for in National Park Management plans and Local Government Planning Schemes to facilitate tourism development where appropriate.

Alongside visitor attractions, the development of a program of events over peak, shoulder and off seasons will complement physical attractors and facilities, providing new reasons to visit.

Other Infrastructure

A range of other infrastructure and services, from signage and public conveniences to town and coastal planning will need to respond to the growth.

A co-ordinated whole of Mackay approach to destination planning and management is required in order to deliver a compelling set of experiences which entice new visitors and encourage repeat custom.

Destination Workforce

Research by Deloitte Access Economics indicates that Mackay's tourism workforce is under pressure from other sectors such as mining and is likely to experience a short-fall under the TFC forecasts.

Workforce development will be a key determinant in helping Mackay achieve its 2020 ambitions.

Community

Tourism growth will at least in part be focused on certain locations and hotspots. Communities will need to be engaged in those areas as key delivery partners and stakeholders.

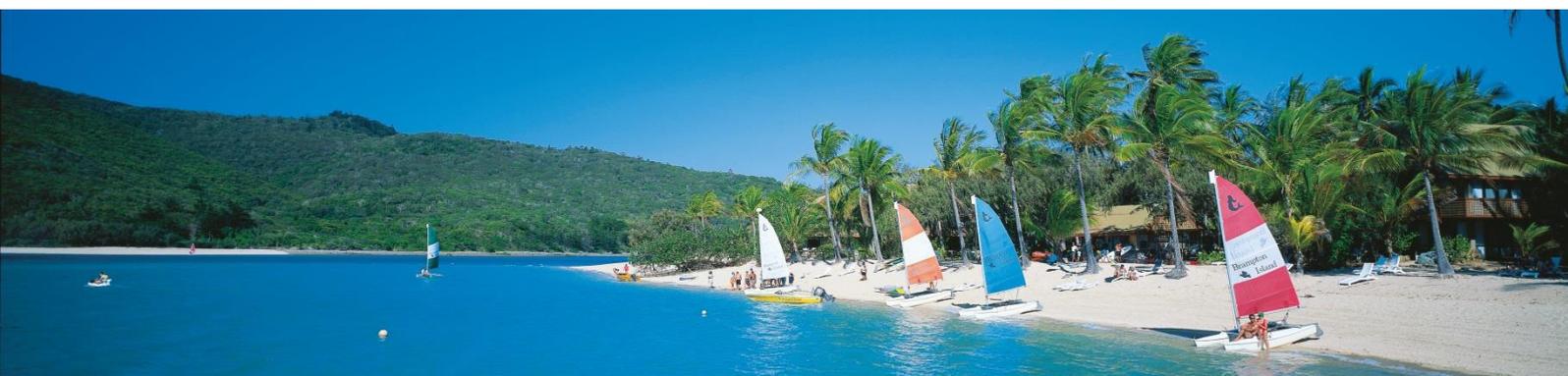
The visiting friends and relatives (VFR) market is currently bigger than the leisure market for domestic overnight visitation. It is likely that the VFR will continue to be an important growth market – this is most effectively influenced by working at community level, and building awareness of facilities and activities.

A friendly welcome is always an important part of the tourism experience. Communities will be stakeholders in delivering this welcome.

Challenges and Opportunities to Achieving the Vision

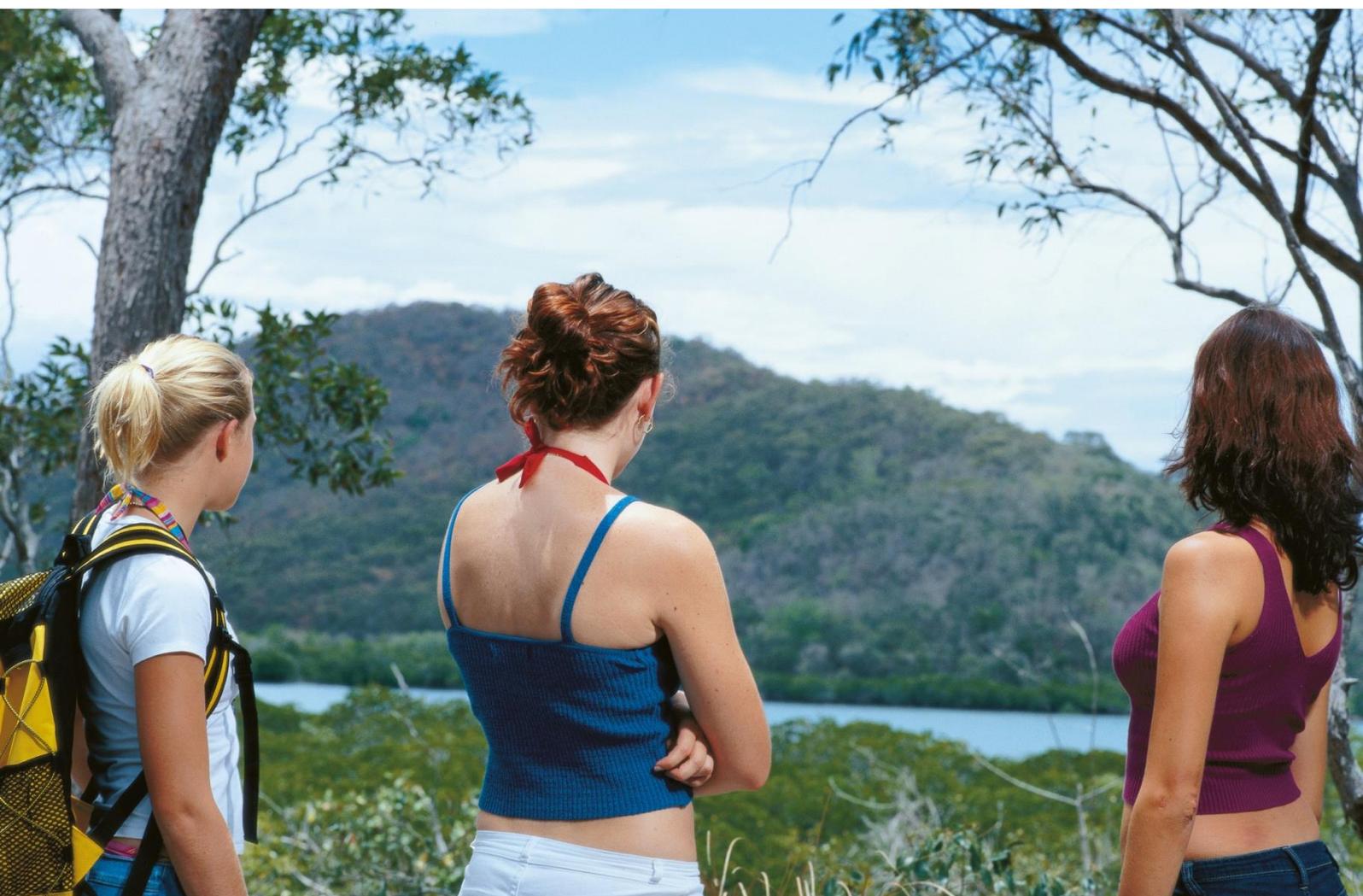
During the consultation process, the following challenges and opportunities were identified towards achieving the vision for Mackay.

CHALLENGES	OPPORTUNITIES
1. Perception that there is not enough to do in the region (especially tour operators) both for leisure and events (pre/post touring).	1. Support the growth and development of regular scheduled tours including reef/islands, rainforest and multi-locations starting with linkages to events and front-desk sales.
2. Lack of domestic and international trade ready operators.	2. Create a major multi-venue fishing event (e.g. a fish-athlon).
3. Tired product not getting reinvestment and lack of innovation.	3. Supporting the growth of new precincts for future growth through planning and investment, leveraging the regional economic development strategy.
4. Not leveraging events, with low local awareness, lack of coordination and lack of resources to chase and grow events.	4. Support MECC and other conference venues to attract, retain and service (including pre/post touring) business events.
5. Cost of operating in the region (building costs, etc.).	5. Coordinate the attraction, operation and calendar of events.
6. Need for greater facilitation within Council to support new product ideas and expansion of facilities.	6. Establish a range of operator clusters (adventure, nature, backpacker, etc.) and begin packaging and creating itineraries.
7. Managing free camping and encourage councils to adopt the new Camping Options Guideline.	7. Target emerging niche markets through targeted promotion.
8. Not enough operator collaboration, packaging or itinerary development.	8. Increase average length of stay through supporting and promoting new products.
9. Lack of local, visitor and even business awareness of existing products and icons.	9. Encourage greater industry collaboration, packaging and participation in trade distribution through mentoring.
10. Difficult to access the islands and the hinterland for those without their own transport.	10. Review the region's signage, camping policy and interpretation approach.
11. Lack of a clear destination brand and identity.	11. Continue brand development process to create a unified message to niche markets.



Enablers of Success

WHAT	WHO
An action plan that provides regional stakeholders with a roadmap on how to develop food and agricultural tourism experiences across the region	DSDIP
Future investment in the airport infrastructure to support high frequency and long-haul aircraft, and to provide facilities for international customs and security	NQA
Review the regions hero experiences and provide a clear direction to industry on what underpins the Mackay story	MTL /TEQ /DSDIP
Development of an investment profile that showcases the regions investment potential, supported by planning schemes that facilitate tourism activities, providing investor certainty and Council processes that encourage innovation and tourism investment	MRC /IRC
Supporting the revitalisation of key tourism sites including Brampton Island, Lindeman Island, Keswick Island and Laguna Quays	DSDIP
Prepare and sign a three year partnership plan with annual action plan with Councils, Tourism Mackay and Tourism and Events Queensland (TEQ)	MTL





DESTINATION STRATEGIES

Strategic Directions

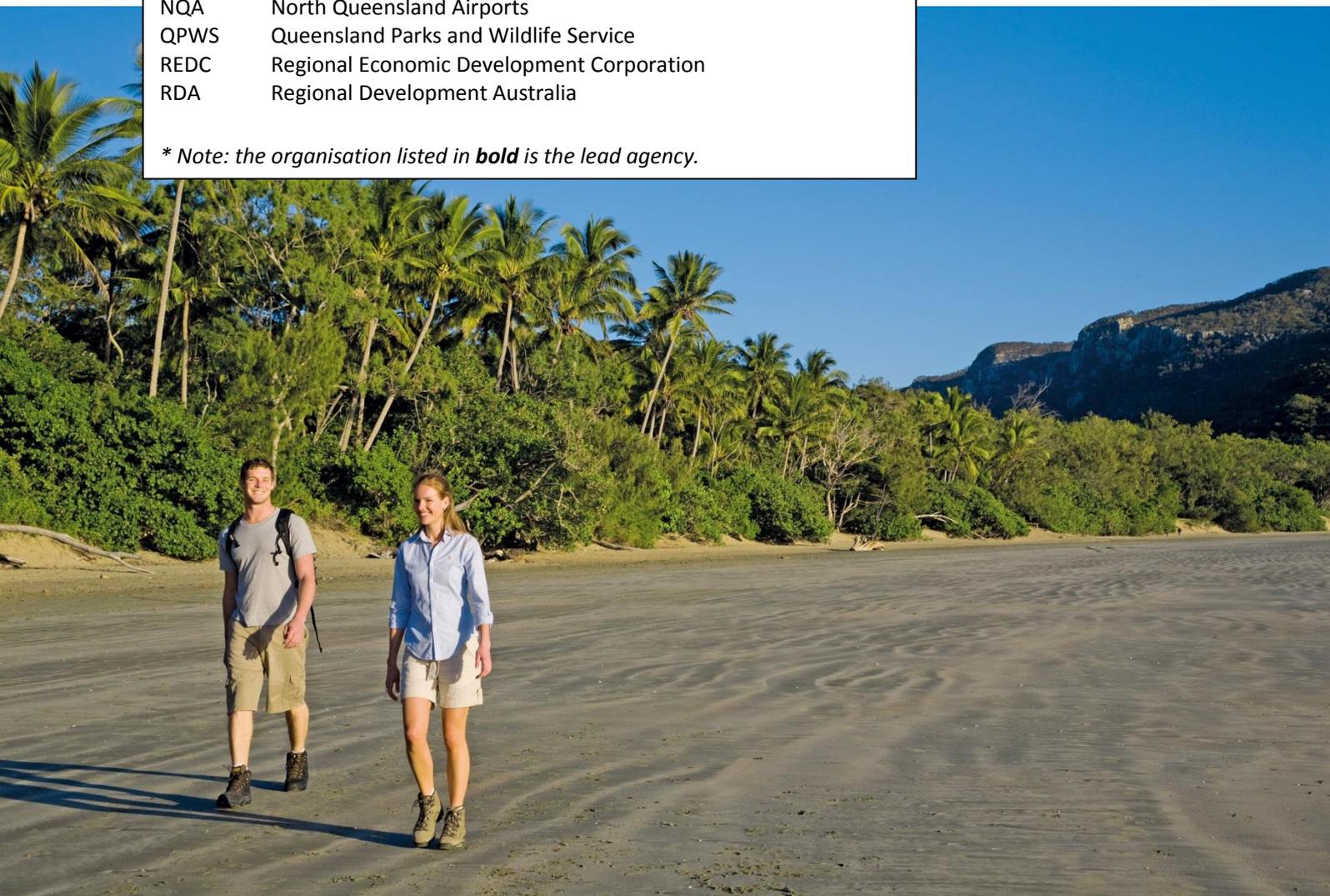
The following section identifies the destination strategies required to help exceed the 2020 target for Mackay by \$100M. Within each, a series of actions have been established as a means of delivering the identified destination strategies.

Each of the strategies have been prepared around, and specifically respond to, the 6 key themes articulated within *Destination Success: the 20 year Plan for Queensland Tourism*. They are designed to enable regions such as Mackay to develop products and experiences in line with their hero experiences.

Partners Acronyms

DSDIP	Department of State Development and Infrastructure Planning
DTESB	Department of Tourism, Major Events, Small Business
DTMR	Department of Transport and Main Roads
DNPRSR	Department of National Parks, Recreation, Sport and Racing
IRC	Isaac Regional Council
TEQ	Tourism and Events Queensland
MECC	Mackay Entertainment and Convention Centre
MIWRO	Mackay Isaac Regional Office (DTESB)
MRC	Mackay Regional Council
MTL	Mackay Tourism Ltd
NQA	North Queensland Airports
QPWS	Queensland Parks and Wildlife Service
REDC	Regional Economic Development Corporation
RDA	Regional Development Australia

** Note: the organisation listed in **bold** is the lead agency.*



1. Preserving our nature and culture

- Natural assets will continue to be at the heart of the Mackay region experience – able to be enjoyed by visitors and locals alike, and preserved for future generations.
- Our unique, authentic character and cultural heritage will be preserved and enhanced, and will always be at the heart of the Mackay region experience.

PRODUCT	PARTNERS	TIMING
1.1 Create a Eungella / Finch Hatton Recreation Management Plan to allow for better management of planned growth including identification of future infrastructure needs and investment opportunities to feed into a regional investment profile.	QPWS/MRC /MTL/DSDIP	Year 1
1.2 Prepare a Mackay Riverfront (Wharf Precinct) Master Plan as part of the Mackay City Centre local planning to define current and future access points, tourism retail, and dining precincts and locations for waterfront accommodation.	MRC/DSDIP MIWRO	Year 3
1.3 Develop and implement a signage strategy to alleviate key issues including free camping, dump points and wayfinding.	MRC/IRC/ DTMR/MTL	Year 4
1.4 Investigate the feasibility of private investment on public land to create a significant tourism precinct development at Eungella as a catalyst for further private investment.	DSDIP/ QPWS/ DNPRSR/ /DTEsb/ MRC/MTL	Year 4
1.5 Use tourism events to activate and showcase our natural experiences.	MTL/MECC/ TEQ/MRC/ IRC	Beyond 2020
1.6 Continue to support the growth of cultural tourism through events, leveraging the city's existing infrastructure.	MTL/MRC/IRC	Beyond 2020

MARKETING	PARTNERS	TIMING
1.7 Create a unifying brand and message for the Mackay region that leverages the economic development partnership of the Whitsunday Regional Organisation of Councils, where Mackay is the capital and Isaac offers a unique coastal and hinterland experience.	MTL/IRC/TEQ/ Industry	Year 1
1.8 Create operator clusters (adventure, nature, backpackers) to encourage packaging of experiences for niche markets.	MTL/TEQ/ Industry	Year 2

2. Offering iconic experiences

- Focus on the consumer, and the experiences offered to create lifelong memories.
- The region's communities and attractions will build on and leverage their strengths and heroes – iconic people, places and events – giving visitors many reasons to stay, explore and return.
- The hero experiences and icons are the region's points of difference, and this is what will be showcased.

PRODUCT	PARTNERS	TIMING
2.1 Attract or grow significant tourism events that position the region as a nature based, outdoor and soft adventure destination.	MTL/TEQ/ MRC/IRC/ Industry	Year 2
2.2 Establish product clusters, made up of operators and providers with quality experiences that deliver on the region's hero experiences including: wildlife encounters, adventure, regional produce, and fishing.	MTL/TEQ/ MRC/IRC/ Industry	Year 2
2.3 Work with QPWS and the Councils to maintain and where feasible reopen key 4WD tracks through the region.	MRC/IRC /QPWS	Year 3
2.4 Create an iconic fishing event and supporting infrastructure (including building on the region's unique diversity of fishing options (e.g. a Fish-athlon).	MTL/TEQ/ MRC/ DSDIP/ Industry/ Corporates	Year 3
2.5 Promote unique wildlife encounters such as 'platypus spotting' or 'see wallabies on the beach' and tours at the Clairview dugong sanctuary.	MTL/TEQ/ Industry	Year 3
2.6 Support the creation of "Big Boy's toys" experiences which give visitors a unique opportunity (like driving a D11).	IRC/Industry	Year 4
2.7 Implement the agreed State-level methodology and assessment tools for regional event evaluation and regularly report to industry, community and the State on regional results.	TEQ/DTESB	Year 4
2.8 Create an iconic lookout over a mine site so the drive market can see the industry in action.	IRC/MTL/ DTMR	Year 5
2.9 Encourage the development of a farmers market / regional food showcase in the Mackay CBD / Riverfront precinct to showcase local growers and produce to encourage take-up of local produce in restaurants and as a catalyst to developing local food trails.	Industry/ MRC	Year 5
2.10 Proactive planning strategies that facilitate tourism activities and public facilities that are pro-tourism.	MRC/IRC/ DSDIP (Regional Planning Team)	Beyond 2020
2.11 Encourage the establishment of new tour operators including reef, rainforest and mining tours.	Industry/ MRC/IRC/MTL	Beyond 2020

MARKETING	PARTNERS	TIMING
2.12 Establish a Tourism Events Advisory Group to guide event acquisition and development, in partnership with other stakeholders.	MTL/TEQ/ MRC/IRC	Year 1
2.13 Create a nature based and soft adventure operator cluster to support cooperative marketing.	MTL/Industry	Year 2
2.14 Recognise and leverage new product clusters to build publicity and advertising programs for niche markets (fishing, touring, wildlife encounters, adventure, and regional produce including sugar and other agriculture).	MTL/Industry	Year 3
2.15 Advertise the regions iconic experiences via iconic promotional and gateway signage: <ul style="list-style-type: none"> • Wallabies on beach • Annual horse race on the beach • Blue River activities • Dalrymple Bay/ Hay Point / Mining Trail • Largest untouched stretch of rainforest in Australia • Regional produce including sugar, horticulture and aquaculture 	DTMR/ MRC/IRC	Year 3
2.16 Support public relations in promoting iconic experiences and tourism events as part of strategic publicity efforts.	MTL/TEQ	Year 4
2.17 In addition to seeing amazing public art, visiting the art gallery, visiting the Botanic Gardens, visiting our museums, the region will have a trail from Mackay to Sarina and out to Pioneer Valley and a range of self-guided walks in the CBD.	MTL/ MRC/IRC	Year 5



3. Targeting a balanced portfolio of markets

- Visitors from Australia and around the world will aspire to visit the region's destinations many times, exploring the diversity of attractions.
- Target a balanced portfolio of markets that match the region's competitive strengths and deliver the best results for this destination.
- Always look to the future, understanding and acting on consumer trends to appeal to traditional markets and grow new markets.

PRODUCT	PARTNERS	TIMING
3.1 Continue the mentoring of operators around the travel trade distribution system (i.e. contracting with wholesalers) to enable the creation of a series of fly-drive packages for the region, leveraging the available accommodation and cheap flights (in on Friday and out on Sunday).	MTL/TEQ/ Industry	Year 1
3.2 Support investment in backpacker related infrastructure and experiences to ensure that the Mackay region retains and expands its share of the youth market.	Industry/IRC /MRC/MTL	Year 4
3.3 Undertake a review of the future demand for existing sporting and events infrastructure in order to cater future market growth.	DNPRSR	Year 4

MARKETING	PARTNERS	TIMING
3.4 Continue to target the 400km short-break and long-haul drive tourism markets.	TEQ/MTL/ Caravan Parks Association	Year 1
3.5 Develop and promote fly-drive packages for the destination linked to/ leveraging brand/campaign activity targeting SEQ and the interstate target markets.	Industry/ MTL/TEQ	Year 1
3.6 Actively target tourism events (including business and leisure) and pre/post business travel experiences to grow the visitor economy including event growth and acquisition.	MTL/TEQ	Year 3
3.7 Promote and advertise experiences the region has to offer that create a competitive advantage: <ul style="list-style-type: none"> • Fishing • Nature (Platypus/walks) • Sugar and mining industries 	MTL/TEQ/ Industry	Year 4
3.8 Build awareness and add value to key events throughout the region through social media and advertising.	MTL/TEQ	Year 4

4. Delivering quality, great service and innovation

- Deliver authentic, quality experiences with a local feel and high standard of service, showcasing the best of the Queensland character and spirit—friendly, welcoming and down to earth.
- The region’s industry will be led by career-oriented professionals that are passionate about tourism and their communities.
- The region’s operators will be technologically smart, connected and efficient, doing business better and reaching consumers in new and innovative ways.

PRODUCT	PARTNERS	TIMING
4.1 Review the hero experiences for the region and align the marketing messages to these heroes.	MTL/TEQ	Year 1
4.2 Create an in-house Experience Development program for operators to embrace the Hero Experiences and create their own signature experiences.	MTL/TEQ	Year 2
4.3 Encourage retail and café operators to extend opening hours during events to accommodate visitors outside of normal business hours.	MRC/IRC/ Operators	Year 2
4.4 Continue to conduct yearly rounds of Social media training for operators needing support to embrace social media.	MTL/TEQ	Annually
4.5 Continue to create a regional investment showcase to demonstrate the lifestyle, education, investment, leisure and employment benefits of moving to the region.	REDC/RDA/ IRC/MRC/ DSDIP	Year 3
4.6 Implement a service quality program to drive profitability, developing the ‘Welcome to Mackay’ program and aligned with IRC’s First Choice Customer Service Campaign including quiz questions on the regions iconic experiences.	MTL/MRC/ IRC	Year 3
4.7 Develop the region’s most effective digital marketing systems and integrate technological innovations across all tourism businesses.	Operators / MTL	Year 4
4.8 Support the efforts of the State Government and QTIC to improve the competitiveness of tourism by advocating for workplace relations reform.	MTL	Beyond 2020
4.9 Resource within the Councils’ Economic Development programs to support tourism development feasibility studies.	REDC/RDA/ IRC/MRC	Beyond 2020

MARKETING	PARTNERS	TIMING
4.10 Create an integrated digital interpretation platform for visitors to share their experience of the regions tracks and trails.	MTL	Year 2
4.11 Implement a program for industry to increase operator knowledge and understanding of the experiences on offer in their region.	MTL	Year 2

5. Building strong partnerships

- Industry and governments will work in partnership at all levels, unified in their approach to support the growth of tourism.
- The tourism industry will have strong leadership that works collaboratively across other industries, with communities and towards a common long-term vision.
- The community will be ambassadors for tourism, welcoming visitors and recognising the benefits that the industry brings to residents.

PRODUCT	PARTNERS	TIMING
5.1 Support informed decision-making with data, research, intelligence and insights.	MTL / TEQ / DTESB / DSDIP / REDC/MRC	Year 1
5.2 Create a Business & Tourism Events Advisory Group to better coordinate tourism event growth, acquisition and support (e.g. transport and retail services around the times of major events) to grow the value of events to the region.	MTL / MRC / TEQ / IRC	Year 3
5.3 Review the role and function of the regions accredited visitor information centres (VICs) in light of the recommendations of the VIC directions paper by Tourism and Events Queensland.	MRC / IRC / Sarina Tourist Art and Craft Centre / MTL / Pioneer Valley Tourism and Development Association	Year 3
5.4 Encourage the formation of operator to operator partnerships and packaging.	MTL / Industry	Year 4
5.5 Seek sponsorships from resource sector companies (such as BMA/RIO etc.) to support destination marketing and product development.	MTL	Year 4

MARKETING	PARTNERS	TIMING
5.6 Sign an annual partnership agreement with a marketing and industry development action plan with TEQ.	MTL/TEQ	Year 1
5.7 Produce an annual 'state of the industry' report—reporting annually on government and industry actions in the DTP and progress made.	MTL/RDA/REDC /DSDIP/TEQ	Annually
5.8 Utilise directories, flyers and social media to advertise the benefits of industry partnerships and networking.	MTL	Year 3
5.9 Create a central digital hub for information on tourism and investment targeting the investor traveller market (e.g. property investment tours).	MTL/MRC/IRC	Year 5

6. Growing investment and access

- Well-planned, timely community and private infrastructure will enable tourism growth and visitor access.
- The ability of the industry to invest and innovate will be encouraged through the continued facilitation and support.

PRODUCT		PARTNERS	TIMING
6.1	Investigate the cost and benefit of subsidised public transport from Mackay airport to the CBD to improve linkages of business travel and events.	MRC	Year 1
6.2	Further enhance road links in the Mackay Region to facilitate access between places.	DTMR / MRC / IRC	Year 2
6.3	Produce a high quality investment prospectus for the planned tourism development projects. This will ensure they remain top priorities for Council, State and Federal funding, and to encourage investment attraction.	MRC/IRC/ DSDIP / REDC / DTESB	Year 2
6.4	Identify the infrastructure and investment opportunities and appropriate planning scheme guidance in three emerging tourism precincts as part of the development of a Whitsunday Region of Councils Investment Profile: <ul style="list-style-type: none"> • Eungella, Finch-Hatton, and Pioneer Valley precinct • Isaac Coast precinct • Great Barrier Reef Island precinct 	MRC/IRC/ QPWS/ DSDIP/ DTESB/ DNPRSR	Year 3
6.5	Continue with the revitalisation of the Mackay CBD with a master plan and investment in tourism oriented precincts / nodes (e.g. potential Wharf Precinct focus).	MRC	Year 3
6.6	Encourage private investment in new tours and activities by simplifying the permit and approvals process and providing avenues for local businesses to promote their products.	MRC / IRC / MTL	Year 3
6.7	Support the revitalisation of key tourism sites including Brampton Island, Lindeman Island, Keswick Island and Laguna Quays.	DSDIP / MTL MRC / DSDIP	Year 4
6.8	Forge stronger Local Government partnerships through joint project steering committees on the remaining priority projects in the Tourism Opportunity Plan including: <ul style="list-style-type: none"> • Mackay Riverfront Tourism Precinct • A private investment feasibility for a significant tourism precinct at Eungella • Major fishing event infrastructure 	MRC / IRC / TEQ/ MTL/ MIWRO/ DSDIP	Year 4
6.9	Remove barriers to investment by reducing costs and stimulating investor confidence and support Local Government capacity building through tourism planning best practice initiatives.	MRC / IRC / REDC / RDA / DSDIP	Year 5
6.10	Strengthen and expand air access to and from the region, focusing on the Sunshine Coast, Gold Coast, Newcastle, Darwin, Melbourne and Sydney connectivity.	NQA / Moranbah Airport / MTL / TEQ	Year 5
MARKETING		PARTNERS	TIMING
6.11	Focus investment in our digital presence and accessibility.	MTL	Year 2



APPENDICES

Appendix 1: Mackay DTP Consultation List

Name	Position	Organisation
Stephen Schwer	GM	Mackay Tourism Limited
Robyn Rae	Manager, Economic Development	Dept. of State Development and Infrastructure Planning
Scott Rebgetz	Director	Mackay Marine Tourist Park
Cr Greg Martin	Councillor	Mackay Regional Council
Geoff Bethel	Director	Isaac Regional Council
Russell Spurrell	Director	Quest Mackay
Col Adamson	Director	Reeforest Adventure Tours
Ron Ailwood	Director	Sarina Tourist Arts and Craft Centre
Angela Lyons		Mackay Grande Suites
Will Dineen	Events Manager	Mackay Grande Suites
Glenys Mansfield	Manager	Sarina Sugar Shed
Nicky Hansen	Sales & Business Development Coordinator	Mackay Entertainment and Convention Centre
Leah Furey	Destination Specialist – Whitsundays & Mackay	Tourism and Events Queensland
Racheal Klitscher	Director, The Whitsundays & Mackay	Tourism and Events Queensland
Sarah Matheson	Marketing Officer	Mackay Tourism Limited
Swaleha Ali	Administration Manager	Mackay Tourism Limited
Luana Royle		Rainforest Scuba Pty/Ltd
Kerryn Beck	Owner	The Shores Holiday Apartments
Sharon Johnston	Senior Specialist, PR & Communication	Dalrymple Bay
Bernarr Alexander		Mackay Regional Council
Leigh Harris		National Parks and Wildlife Service
Mike Griinke		National Parks and Wildlife Service
Ben Atherton	Owners	Cape Hillsborough Nature Resort
Mick Pope	Event Organiser	Mackay Harbour Beach Race Day
Kevin Clarke		Ocean International
Darlene Stayte	Manager	Eimeo Pacific Hotel
Trehan Stenton	President	Moranbah Traders Association
Emily Fry		Isaac Regional Council
AnneMarie Farrelly		Mackay Regional Council
Rachel Daniels	Strategic Planner	Mackay Regional Council
Janeke Gazecki		Beach Polo
Andrew Schembri	Senior Strategic Planner	Mackay Regional Council
Rob Porter		Mackay Airport
Mark Fawcett	Manager MECC and Events	Mackay Entertainment and Convention Centre
John Caldwell	Manager Development Assessment	Mackay Regional Council
Anna Thurgood	Director	Artspace Mackay
Melaina Voss	Project Director Regional Sustainability, Strategy and Engagement	Mackay Regional Council
Gerard Carlyon	Director Community and Client Services	Mackay Regional Council
Onno Van Es	Assistant Director Development Services	Mackay Regional Council
Joe Pappalardo	Executive Officer Performance and Strategy	Mackay Regional Council
Dirk Dowling	Manager Economic Development	Mackay Regional Council
Jessica Dix		Isaac Regional Council