The Mackay Isaac Region
Queensland Nature. Reserved.

2024 - 2028

Mackay Cruise Ship Strategy

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EXECUTIVE SUMMARY

What is our intent with the Mackay Cruise Ship Strategy?

The Mackay Cruise Ship Strategy aims to delineate a comprehensive plan for the Mackay region to embrace cruise ships and facilitate day shore excursions. Recognising the potential at the Port of Mackay, strategically positioned just 6 kilometres north of Mackay city, the goal is to leverage its proximity to a wharf within the harbour, catering to ships of up to 270 metres.

> ***Ultimately, the overarching objective is for Mackay Isaac Tourism (MIT) to position Mackay as an attractive cruise ship destination through effective marketing, relationships, capacity building and promotional initiatives.***

Are our current plans aligned?

There is some indirect alignment with current plans but very little direct reference to cruise ships and this needs to be addressed through:

1. Constructive dialogue between MIT and Mackay Regional Council (MRC); and
2. Once adopted, the Mackay Cruise Ship Strategy will need to be included in MIT's new **Destination Tourism Plan** (DTP) or added before then as an Addendum.

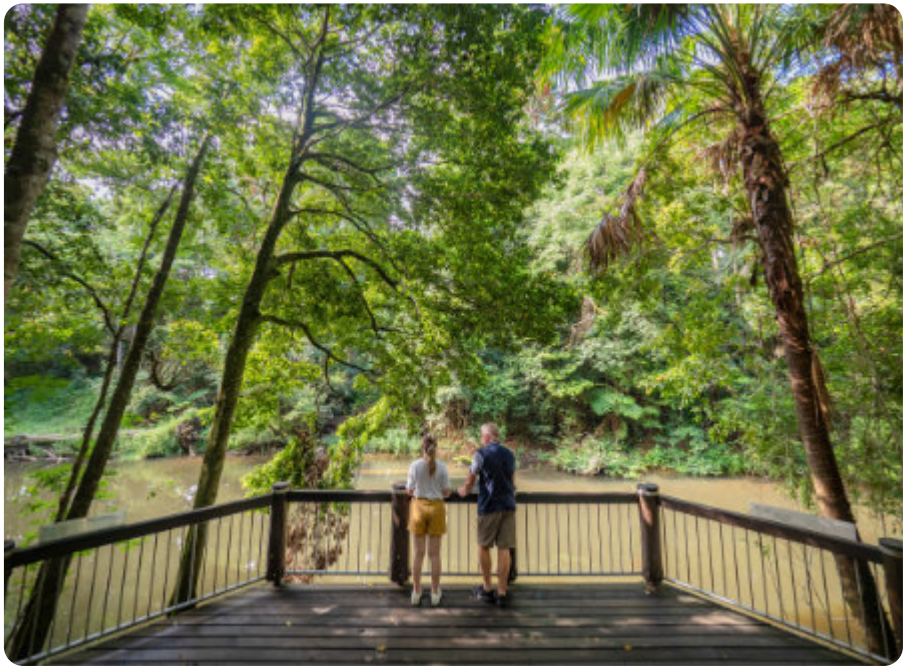
Mackay Regional Council (MRC)	There is no mention of cruise tourism in the MRC plans, meaning there needs to be clear communication and engagement by MIT to ensure both have the same perspective on, and vision for, this strategy. There is indirect or implicit reference in: • **Industry Development - Tourism** - Work with Mackay Tourism to develop more commissionable tourism product and 'shovel-ready' projects. These could include indigenous experiences, Great Barrier Reef experiences (i.e. sailing and fishing) and other experiences around Mackay, Hibiscus Coast, the Pioneer Valley, Sarina and southern beaches; and • **Marketing and Promotion** - Create a suite of marketing material 'Mackay Opportunities' to support specific identified investment opportunities, and meet with partners (i.e. developers, industry groups, specialty consultants, etc.) in identified growth sectors to discuss opportunities.
Tourism and Events Queensland (TEQ)	TEQ's Towards Tourism 2032 Strategy references the cruise sector, stating a need to **"Develop a holistic value proposition of the cruise sector for Queensland and its regions, including a focus on maximising the sector's leverage and opportunity in the leadup to Brisbane 2032."** TEQ also works with a range of partners on an ongoing basis to identify and elevate shoreside experiences along the Queensland coastline.
Mackay Isaac Tourism (MIT)	MIT's DTP vision has some indirect alignment: "To be a must visit destination by showcasing memorable, authentic and unique nature based and heritage experiences and events to the world." The purpose is: *"To provide a sustainable tourism industry that brings economic and social benefits to the Mackay and Isaac Region without detriment to the natural environment and local values and culture."*

Why Are We Doing Cruise Ship Tourism?

Throughout the consultation phase of the development of this strategy, the question of 'Why do we, as a community, want to establish Mackay as a cruise ship destination?' was posed to key stakeholders. There are several compelling answers, including:

1. **Local Drivers:** The responses varied, but all seemingly linked to key elements of the Mackay DTP (including the Vision and Purpose) or reflected the values of key stakeholder organisations (for example, it is all about the community or customer experience);
2. **Market Share:** In March 2024 cruising's market penetration rate in Australia was close to 5%. Almost one in every 20 Australians took an ocean cruise, one of the highest rates in the world.

   Australians showed a preference for close-to-home itineraries — about 84.8% cruised within Australia, New Zealand and the South Pacific during 2023, up from 72.5% in 2019. (Source: Seatrade Cruise News) Mackay can be a part of this;
3. **Good for the Economy:** The estimated national economic impacts generated by cruise tourism expenditure, converted to cruise tourism output, in Australia in 2022-23 is:
   a. Total output of $5.63 billion, including direct output of $2.5 billion;
   b. Total wages income of $1.82 billion, including $941 million in direct income and $878 million in indirect and induced wages income;
   c. Total supported employment of 18,225 full time equivalent positions (FTEs), including 9,869 direct positions and 8,365 indirect and induced positions; and
   d. Total value-added impact of $2.94 billion, including a direct impact of $1.32 billion (source: Cruise Line International Association, CLIA); and
4. **Mackay region benefits include:**
   - If the cruise visits expand and meet targets this influx of tourist spending can stimulate business activity, create job opportunities, and generate revenue for local businesses, suppliers, and service providers. This includes spending on shore excursions, dining, shopping, transportation, accommodations for pre- and post-cruise stays, and souvenirs;
   - The cruise tourism industry could diversify existing revenue streams and create employment opportunities for locals;
   - Existing tourism operators can both improve their product development and delivery for cruise passengers as well as other visitors to the region;
   - Fostering a sense of community pride and engagement among local residents through the intended use of Tourism Ambassadors sharing their training, knowledge and passion for the destination; and
   - A passionate local arts community can raise their profile and express their creativity and become a vital part of on shore experiences.



Who visits us now?

HOW MANY?

According to the most recent visitation data available through Tourism Research Australia (TRA for the year ending September 2023), the Mackay region (excluding Isaac) received approximately 659,145 overnight visitors. Domestic visitors contributed close to 95% of all visitor nights received, largely due to the region's very strong domestic business market, and low visitation from international markets.

WHAT DO VISITORS LOOK LIKE?

The most prominent visitors to the Mackay Region for the year ending September 2023 was the 55 and over age group, at just over **35% of all visitors**. There may be some business related travel within this segment, however, it is more likely that this travel is being driven predominantly by the Grey Nomad segment undertaking holiday and VFR related travel to the Isaac. The over 55 age group was then followed by the 50-54 age group (13%), and then by the 40-44 (10%).

OVERNIGHT VISITOR EXPENDITURE (OVE)

	Year ending December 2016 - Year ending December 2019 (4 year average)	Year ending December 2020 - Year ending December 2021 (2 year average)	Year ending December 2021 - Year ending December 2022 (2 year average)
Domestic Overnight Expenditure	$323 million	$263 million	$364 million
International Overnight Expenditure	$18 million	N/A	N/A
Total Overnight Visitor Expenditure	$341 million	$263 million	$364 million

WHAT DO THEY DO?

The activities undertaken in the region involve the unique natural assets (e.g. Cape Hillsborough, Eungella), camping and outdoor options, enjoying the rich cultural history and a growing events calendar. The outdoors, in particular National Parks, camping, bushwalking, fishing and visiting the beach, all rank highly.

What Do Cruise Passengers Look Like?

The Cruise Lines International Association's Source Market figure for the 2022 calendar year shows the Australian cruise market is making a swift recovery from its pandemic suspension. Cruising Australians tend to be between 42-70 years in age. However, younger cruisers hold a steady share of the cruise market. For example, 8% of all Australian passengers are 12 years old or younger, 6% of passengers are aged between 13-19, 7% are between 20-29 years old, and 8% of passengers are aged between 30-39 years old.

What can we offer passengers?

TOURISM AUDIT

Some key points to note from the tourism experiences/attractions audit include:

- 117 tourism experiences and attractions are currently on offer within the Mackay Region;
- A relatively small number of bookable (commissionable) tourism experiences are on offer (a weakness);
- The majority of experiences are Natural Attractions, 24% of all on offer in the Mackay Region;
- Natural Attractions include National Parks, islands or beaches;
- 61% of all experiences/attractions (region's highest concentration) on offer are centred around Mackay City;
- There is a good mix of both indoor and outdoor experiences/attractions; and
- The Mackay region has a good balance of paid versus free product, which is a positive driver of increased visitor dispersal and expenditure.

The region is in a competitive position compared to some similar regional cruise destinations which have the challenge of less paid product in comparison to the inventory of free experiences/attractions on offer.

OUR CHALLENGES

There are, however, challenges evident from the audit conducted. These include:

- Despite the strong agricultural sector within the Mackay region, there is very little on offer in terms of agri and farm based tourism experiences;
- The tourism sector in the Mackay region is not as developed, and not as aware of key product/experience development principles (such as the need for commissionable product), as other more (tourism) mature cruise destinations such as the Whitsundays;

There is a need and opportunity to facilitate this process by providing additional support.

- Given the rich cultural history of the Mackay region, there is an opportunity to develop Indigenous cultural tourism experiences; and
- Many of the paid, nature based experiences and attractions (which accounts for a significant portion of paid Mackay experiences on offer) are located outside of Mackay City – in some cases close to two hours drive away.

Seamless and reliable transportation options that form part of excursion experiences will be critical to reach the Isaac region.

How Can We Compete?

While attracting cruise lines is a competitive landscape and a proactive approach is imperative to sustaining growth, collaboration with neighbouring cruise destinations on an itinerary is also critical to capture market share alongside developing our own unique tourism offerings and itineraries.

OUR KEY ENABLERS

The primary enabler is the port.

The port has a capacity for cruise liners up to 270 metres based on recent NQBP simulation modelling but will need to get the Harbour Master's approval and train pilots, and regardless of this, wind and weather related limits will always exist.

The port logistics will ultimately be led and directed according to the safety, capacity and operational needs or constraints of NQBP under its own procedures and regulatory guidelines matched with the requirements of the Harbour Master. However, beyond the marine and port operations decision-making, it is imperative to consider the operational needs of the bus transport provider and ultimately the passengers' customer experience and safety.

NQBP has identified some excellent options for handling cruise liners and an ideal wharf from a marine, bus transport (passenger pick up/drop off) and a safety aspect.

A summary of the primary enablers and barriers (scored 1-5, 5 being high) is shown here.

PRIMARY ENABLERS			PRIMARY BARRIERS
First class port infrastructure. NQBP is very engaged, committed and is a large successful commercial company. Several excellent docking options are possible.	+5	-4	**Volunteers.** The number of volunteers needed will require coordination through MIT and local service clubs to have enough capacity for local tours and for shore experience company tours who will hire trained locals.
Excellent bus transport capacity. At least one major bus company, is committed and is community and safety focussed.	+5	-4	**Additional Staffing Resource needed.** MIT needs to identify at least 6-12 months of catalytic additional support for the project and delineate/define the overlap between other staff roles within MIT and with MRC.
Accessible 8 km radius from port. Includes the marina, riverside precinct, markets, CBD, hospitality, major shopping centres, arts trails and activities.	+4	-4	**Taxis.** Taxis can be difficult to get in Mackay.
MIT has tourism and operator focussed roles already.	+4	-3	**Access to the Isaac region.** It is more difficult to access much of the Isaac region due to time constraints and the product is less developed. May need to activate helicopter tours.

What Will Cruise Passengers Do Here?

Availability and content of shore excursion programs are generally determined by the cruise ship companies through their shore excursion operator partner, ensuring the tours offered are tailored to their clients' needs. Once tours are agreed and contracted at the destination, the cruise ship companies can offer a wide range of targeted predetermined/pre-costed programs which they then heavily promote to passengers prior to the ship's arrival at port. A captive audience.

Travellers are seeking:

1. To make a positive impact on the destinations they visit;
2. Experiences that showcase the natural environment, wildlife, and sustainability of the area;
3. Time, comfort, attentiveness, peace and space are the new luxury goods;
4. Travellers want a more personalised experience and there is a desire for more shore excursions;
5. Cruise visitor buying decisions are being driven more by the port destinations than the on-board facilities;
6. Customer satisfaction of the onshore experience is a key metric cruise lines use in itinerary planning; and
7. Guests value free time to explore the destination and get a feel for the place.

The Mackay Isaac Region has an array of highly attractive cruise passenger experiences which have been broken into potential short and longer duration excursions, those immediately available and those that need to be developed, in the Strategy.

The Strategic Goals

Where do we head then? These goals capture the strategic analysis and background assessment against Mackay region's capacity to be successful in the cruise ship market space.

	STRATEGIC GOAL	STRATEGIC INTENT
1	**Promote Mackay's port as a safe and highly appealing cruise destination.**	Promote Mackay's port as a secure and attractive destination for cruise ships by highlighting the port's safety measures alongside local attractions, cultural experiences, its CBD and marina proximity and any unique selling points that make the destination stand out to cruise operators, inbound tourism companies and passengers.
2	**Provide industry support and capability building to ensure quality service, products and experiences are delivered to meet the expectations of cruise lines, shore excursions providers and passengers.**	Support businesses within the cruise tourism sector to ensure they can deliver high-quality services and experiences. This might include training programs and networking opportunities. This net covers a broad range of businesses including taxis, retailers and others outside of tourism and hospitality.
3	**Encourage investment in new products, experiences and destination infrastructure.**	Stimulate investment in new attractions, experiences and infrastructure that will enhance the cruise tourism experience in Mackay. This could involve working with local government, private investors, and community organisations to identify opportunities for development and provide support for projects that align with the overall strategy.
4	**Over time, increase the regional dispersal of passengers when they visit our region.**	Spread the economic benefits of cruise tourism beyond the immediate port area and into the wider region including Isaac. Strategies for achieving this could include promoting day trips and excursions to nearby attractions, encouraging passengers to explore areas further out and collaborating with local businesses to create packages and deals that incentivise spending outside of the port vicinity.
5	**Establish a governance and monitoring framework to ensure the cruise sector grows and implementation is actioned.**	Put in place a structured framework for overseeing the growth of the cruise sector and ensuring the effective implementation of the strategy. This includes establishing a dedicated forum, defining MIT roles and responsibilities, setting performance indicators and targets, and regularly reviewing progress to make adjustments as needed.

Six Strategic Pillars To Support These Goals

The six 'pillars' and their related actions below are recommended for implementation by all stakeholders to achieve the destination's cruise specific targets by the year 2028 and beyond:

STRATEGIC PILLAR	DESCRIPTION
PILLAR 1 *Cruise Ship Attraction*	Aims to prominently position Mackay on the cruise tourism map through strategic partnerships, compelling promotional materials, and direct engagement with cruise lines and shore experience providers.
PILLAR 2 *Enhanced Infrastructure and Operational Excellence*	Focuses on optimising the operational framework and infrastructural capabilities to effectively support cruise ship visitation.
PILLAR 3 *Welcoming and Onshore Experience*	Emphasises the importance of first impressions and aims to provide a memorable, positive introduction to the region.
PILLAR 4 *Engagement and Collaboration*	Aims to establish and deepen relationships with cruise lines, local businesses, service providers, and government entities to ensure a coordinated approach to developing Mackay as a cruise destination.
PILLAR 5 *Ongoing Promotion and Positioning*	Focuses on continuous engagement with the cruise industry and the strategic use of marketing to ensure Mackay remains top of mind among cruise lines, tour operators, and potential visitors.
PILLAR 6 *Governance and Monitoring*	Emphasises the importance of clear leadership, defined roles, and collaborative processes to ensure that all actions and strategies are effectively overseen, monitored and executed.

What Next?

The next steps and actions are fully detailed in the ***Implementation Action Plan*** in ***Appendix One*** which includes:

- Strategic Pillars (to achieve the Strategic Goals);
- Actions against each Pillar;
- Timeframes;
- Action Owner and Collaborators;
- Resources needed; and
- Measurement of Success and Targets.

1 SETTING THE SCENE

1.1 Purpose of the Mackay Cruise Ship Strategy

The Mackay Cruise Ship Strategy aims to delineate a comprehensive plan for the Mackay region to embrace cruise ships and facilitate day shore excursions. Recognising the potential at the Port of Mackay, strategically positioned just 6 kilometres north of Mackay city, the goal is to leverage its proximity to a wharf within the harbour, catering to ships of up to 270 metres (with ongoing modelling for ships up to 290 metres).

> ***Ultimately, the overarching objective is for Mackay Isaac Tourism (MIT) to position Mackay as an attractive cruise ship destination through effective marketing, relationships, capacity building and promotional initiatives.***

Encouraged by the outcomes of a February 2023 workshop, which underscored the viability of the project, the Strategy emphasises these key elements:

- **Port Potential:** Acknowledges the industrial nature of the Port of Mackay, dealing with grains, fuel, and sugar, while asserting that this poses no deterrent to attracting cruise ships;
- **Natural Attractions:** Highlights the region's abundant natural attractions, positioning the development of a diverse shore excursion program as crucial for enhancing the overall passenger experience; and
- **Accessibility:** Emphasises the convenience of the 8-minute coach journey from the port to the centre of Mackay, ensuring accessibility for passengers seeking independent shore experiences.

The Strategy includes these sections:

1. A Strategic Context Assessment;
2. The Mackay Regional Economy and Visitor Market;
3. Cruise Sector Potential and Market;
4. A Tourism Audit;
5. Competitor and Gap Analysis;
6. Strategic Analysis;
7. Strategic Goals, Pillars and Actions;
8. Risk Assessment;
9. Appendices, including an Implementation Action Plan.

1.2 Mackay Cruise Ship Strategy Project Methodology

Given the scale of this project - the delivery was divided into several key methodology phases, as per below:

PHASE 1 - PROJECT MOBILISATION	Mobilisation Meeting with client to confirm project scope, deliverables and timeline
	Project mobilisation to agree on scope of work, objectives and background materials
	Preparation of a Project Plan, including a Stakeholder Engagement Plan
Milestone 1: Completion of Project Plan	
PHASE 2 - DESKTOP/ASSESSMENT/ AUDIT PHASE	Mackay Isaac Region Visitation and Economy Assessment
	Cruise Sector Potential - Economic and Social Impacts for the Mackay Isaac Region
	Tourism Experiences Assessment and Audit
	Gap Analysis and Potential Opportunities Assessment - Cruise Focus
	Competitor Analysis and Technical/Logistical Fit
Milestone 2: Completion and Delivery of Phase 2	
PHASE 3: STAKEHOLDER ENGAGEMENT	Preparation of Discussion Paper as the basis of consultation
	Program of one on one meetings with key stakeholders
	Stakeholder Workshops
Milestone 3: Completion and Delivery of Phase 3	
PHASE 4 - STRATEGIC ASSESSMENT PHASE	Cruise Ship Management in Mackay: Port Logistics, Scheduling, and Operational Coordination Analysis and Assessment
	Cruise Ship Management in Mackay: Infrastructure and Investments Analysis and Assessment
	Cruise Ship Management in Mackay: Shoreside and Cruise Service Provision and Third Party Requirements and Interest
	Mackay Shore Excursion Programs: Tour Development and Visitor Experiences Analysis and Assessment
	Mackay Cruise Sector Marketing Strategy Scoping

Milestone 4: Completion and Delivery of Phase 4	
PHASE 5 – MACKAY CRUISE STRATEGY IMPLEMENTATION ACTION PLAN	This phase will involve the development of an Implementation Action Plan covering a range of areas as detailed in the project brief. Key sections covered in the action plan will include: • **Governance:** Recommendations on governance models that should be considered in order to ensure the successful establishment and subsequent management of a Mackay Cruise Ship Program. • **Product/Experience/Event Development:** Recommendations and a plan to address some of the product/experience development opportunities and challenges. • **Infrastructure:** Recommendations and Action Plan on key infrastructure requirements that are needed to ensure the potential that cruise ships offer is maximised to its full potential. • **Legislative Requirement:** Identification of key legislative barriers and opportunities, and recommendations/action plan on relevant legislation and approval requirements. • **Marketing:** A detailed marketing plan for a Mackay Cruise Ship Sector.
Milestone 5: Completion and delivery of Phase 5 – Completion of Project	

2 STRATEGIC CONTEXT ASSESSMENT

2.1 Current Planning Context

There is some indirect alignment with current plans but very little direct reference to cruise ships and this needs to be addressed through:

1. Constructive dialogue between MIT and Mackay Regional Council (MRC); and
2. Once adopted, the Mackay Cruise Ship Strategy will need to be included in MIT's new **Destination Tourism Plan** (DTP) or added before then as an Addendum.

Mackay Regional Council (MRC)	There is no mention of cruise tourism in the MRC plans, meaning there needs to be clear communication and engagement by MIT to ensure both have the same perspective on and vision of this strategy. There is indirect or implicit reference in: • **Industry Development - Tourism** - Work with Mackay Tourism to develop more commissionable tourism product and 'shovel-ready' projects. These could include indigenous experiences, Great Barrier Reef experiences (i.e. sailing and fishing) and other experiences around Mackay, Hibiscus Coast, the Pioneer Valley, Sarina and southern beaches; and. • **Marketing and Promotion** - Create a suite of marketing material 'Mackay Opportunities' to support specific identified investment opportunities, and meet with partners (i.e. developers, industry groups, specialty consultants, etc.) in identified growth sectors to discuss opportunities.
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Mackay Isaac Tourism (MIT)	MIT's Destination Tourism Plan (DTP) vision has some indirect alignment: "To be a must visit destination by showcasing memorable, authentic and unique nature based and heritage experiences and events to the world." The purpose is: "To provide a sustainable tourism industry that brings economic and social benefits to the Mackay and Isaac Region without detriment to the natural environment and local values and culture."

SETTING THE SCENE (CONTINUED)

The current DTP relates to some elements of the Mackay Cruise Ship Strategy, in particular, those shown below which in turn pose related questions to consider for revision:

	DTP ELEMENT	MIT QUESTION TO CONSIDER
1	**Foster community pride in the region to build and strengthen the consistency of image.**	How much does MRC want to drive this aspect of cruise tourism as a priority?
2	**Encourage the development and introduction of new tourism products, experiences and events by working with existing and attracting new tourism products and experiences to the region. This includes supporting Traditional Owners to deliver authentic cultural experiences.**	How can MIT resource this to fill cruise sector gaps which may be different? How can MIT support the development of authentic cultural experiences?
3	**Increase the number of international and domestic trade ready tourism experiences in the region.**	How much growth in trade-ready experiences are we seeing now and how much do we need to accelerate this for 'cruise ready'?
4	**Support tourism infrastructure development through coordinated applications funding programs noting the importance of quality roads and alternative transport options to connect visitors and communities to attractions and services.**	How will MIT partner with critical cruise stakeholders such as NQBP and MRC to implement the Mackay Cruise Ship Strategy?
5	**Promote local opportunities to local people to support community engagement with tourism.**	How much of an imperative is the need to sell cruise tourism to the community and recruit Tourism Ambassadors?

TOURISM AND EVENTS QUEENSLAND'S FIVE PILLARS FRAMEWORK

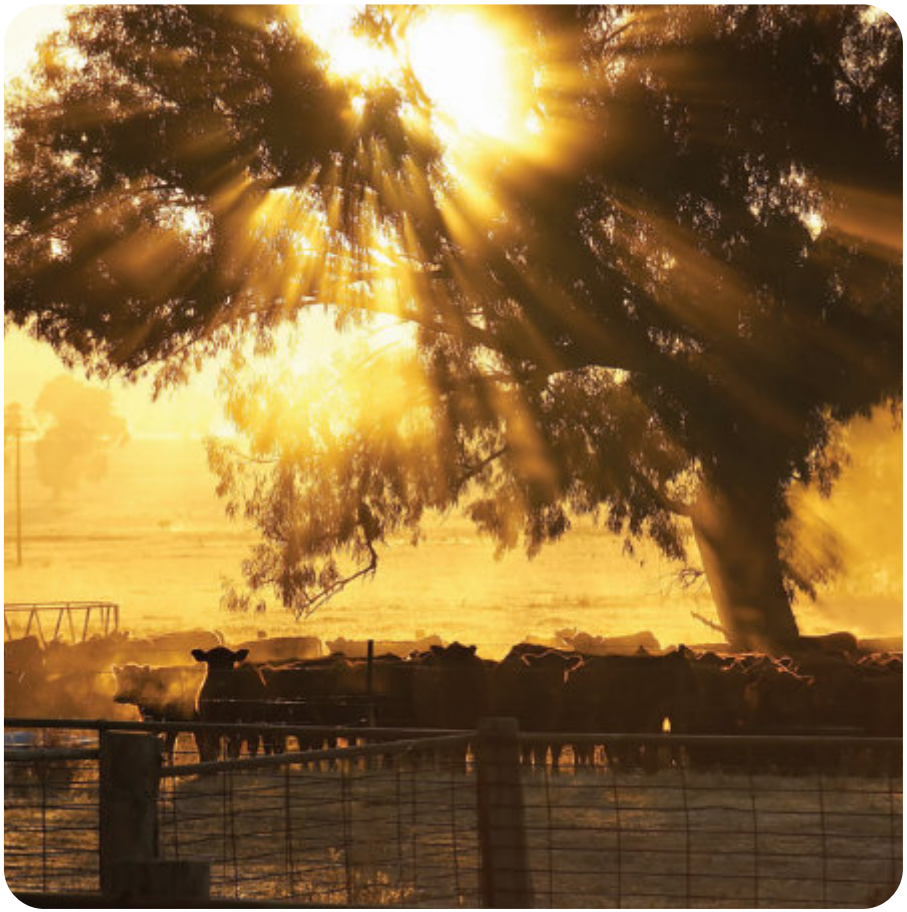
Five consumer-oriented experience pillars have been identified by Tourism and Events Queensland (TEQ), drawing inspiration from categories discerned through extensive research, shown below.

In the context of the Mackay tourism sector, the destination's hero experiences currently include the below.

SETTING THE SCENE (CONTINUED)

WHY UNDERTAKE CRUISE SHIP TOURISM

1. ***Local Drivers:*** The responses to this question varied, but all seemingly linked to key elements of the Mackay DTP (including the Vision and Purpose) or reflected the values of key stakeholder organisations (for example, it is all about the community or customer experience);
2. ***Market Share:*** Australia holds a significant market share of cruising worldwide, accounting for 4.5% of global cruise ship deployments in 2017 (Cruise Industry News 2018), and continues to grow in line with global growth. Mackay can be a part of this;
3. ***Good for the Economy:*** The estimated national economic impacts generated by cruise tourism expenditure, converted to cruise tourism output, in Australia in 2022-23 is:
    - Total output of $5.63 billion, including direct output of $2.5 billion;
    - Total wages income of $1.82 billion, including $941 million in direct income and $878 million in indirect and induced wages income;Total supported employment of 18,225 full time equivalent positions (FTEs), including 9,869 direct positions and 8,365 indirect and induced positions; and
    - Total value-added impact of $2.94 billion, including a direct impact of $1.32 billion (Source: Cruise Line International Association, CLIA); and
4. ***Mackay region benefits include:***
    - If the cruise visits expand and meet targets this influx of tourist spending can stimulate business activity, create job opportunities, and generate revenue for local businesses, suppliers, and service providers. This includes spending on shore excursions, dining, shopping, transportation, accommodations for pre- and post-cruise stays, and souvenirs;
    - The cruise tourism industry could diversify existing revenue streams and create employment opportunities for locals;
    - Existing tourism operators can both improve their product development and delivery for cruise passengers as well as other visitors to the region;
    - Fostering a sense of community pride and engagement among local residents through the intended use of the Tourism Ambassadors sharing their training knowledge and passion for the destination; and
    - A passionate local arts community can raise their profile and express their creativity and become a vital part of on shore experiences.



2.2 Global Cruise Statistics

The cruise industry, like all tourism and hospitality industries, was adversely impacted by the unprecedented spread of the COVID-19 virus. Projected global cruise passenger volume is expected to recover and surpass 2023 levels and be in excess of 12% above 2019 levels by the end of 2026 *(source: CLIA: Tourism Economics)*.

The global economic impact of cruising is estimated to be over US$134 billion, creating approximately 1.1 million jobs worldwide *(CLIA, 2019)*. Australia is ranked fifth in total numbers of cruise passengers, however, enjoys the highest market penetration rate in the world (cruise passengers per capita).

As of January 2020, there were 132 new cruise ships worth approximately US$64 billion on order for delivery over the next 10 years, representing a 42% increase in the global fleet, and a 52% increase in passenger capacity. Shipyards were generally considered to be at production capacity *(CLIA, 2018)*.

Australia held a significant market share of cruising worldwide, accounting for 4.5% of global cruise ship deployments in 2017 *(Cruise Industry News 2018)*, and continues to grow in line with global growth. Australia is an appealing destination to domestic and international passengers as it:

- Is renowned as a safe destination with good air access into and around the country;
- Has a well-developed tourism industry and supporting infrastructure;
- Has an extensive range of natural and cultural assets; and
- Draws strong emotional appeal for domestic and international cruise passengers.

2.3 Cruise Sector Potential - Economic and Social Impacts

The national economic impact of cruise tourism in Australia for 2022-23 is based on the aggregation of all passenger, crew and cruise line expenditure at each port or destination visited by a cruise ship during the season. The estimated national economic impacts generated by cruise tourism expenditure, converted to cruise tourism output, in Australia in 2022-23 as:

- Total output of $5.63 billion, including direct output of $2.5 billion;
- Total wages income of $1.82 billion, including $941 million in direct income and $878 million in indirect and induced wages income;
- Total supported employment of 18,225 full time equivalent positions (FTEs), including 9,869 direct positions and 8,365 indirect and induced positions; and
- Total value-added impact of $2.94 billion, including a direct impact of $1.32 billion.

(Source: 2022-23 Value of Cruise Tourism Australia Cruise Association (australiancruiseassociation.com)

2.4 Cruise Sector Sustainability

RENEWABLE FUELS AND ALTERNATIVE ENERGY SOURCES

Various CLIA member lines are trialling, using, and incorporating into new-build ships the capability to run on renewable fuels, including biofuels and synthetic carbon fuels:

1. Within the CLIA member fleet, four ships sailing today use renewable biofuel as an energy source - and an additional four new-build ships are expected to be configured for renewable biofuels;
2. In addition, 24 ships have biofuel trials and two have synthetic carbon fuel trials; and
3. Seven new-build ships are anticipated to run on zero carbon fuels, including five ships envisioned to use green methanol and two envisioned to use green hydrogen.

SETTING THE SCENE (CONTINUED)

SHORESIDE ELECTRICITY (SSE) CAPABILITIES

Plugging into shore side electricity allows ship engines to be switched off, reducing emissions by up to 98% (depending on the mix of energy sources) while ships are in port, according to studies conducted by a number of the world's ports and the U.S. Environmental Protection Agency.

> ***How can NQBP and the Mackay destination provide future services or appeal to sustainability requirements? This will depend on local capacity to supply but also logistical requirements and the procurement contracts of cruise lines to remain with existing arrangements or port suppliers.***

3 THE MACKAY REGION ECONOMY AND VISITOR MARKET

3.1 About the Mackay Region

The Mackay Region is home to an estimated resident population of 125,000 (Remplan, year ending December 2023) and is situated 980 km north of Brisbane, with the area forming part of the broader Mackay Isaac tourism region. The region covers close to 7,622km square kilometres (with the Isaac region being an additional 58,869 square kilometres) in size, and features a variety of natural and man made assets that contribute to a strong regional economy.

The region is home to numerous regional towns and villages, and several National Park areas including Cape Hillsborough, Eungella, Mount Jukes, Mount Martin, Mount Ossa, Pioneer Peaks and Reliance Creek National Parks. The Mackay region serves as the entrance to the abundant coal reserves in the Bowen and Galilee Basins and is a hub for the engineering, manufacturing, and mining services industries that contribute to the resources sector. Additionally, it stands as a prominent sugar-producing region in Australia and houses one of the nation's major ethanol product producers.

The Mackay region has experienced steady population growth between 2012 and 2022, with the population increasing by 7,468 residents over the 10 year period (11% growth) driven by the economic growth of the region through mining, manufacturing and construction (ABS, August 2023). The population's growth is also perhaps not a true reflection of the rate at which the region's economy has grown across the same timeframe, which has experienced an increase in Gross Regional Product (GRP) of 81% between 2012 and 2023 (Remplan, 2023).

> ***The region's prosperous economy is expected to continue to drive strong population growth over the next 20 years.***

3.2 Current Tourism Visitation and Performance

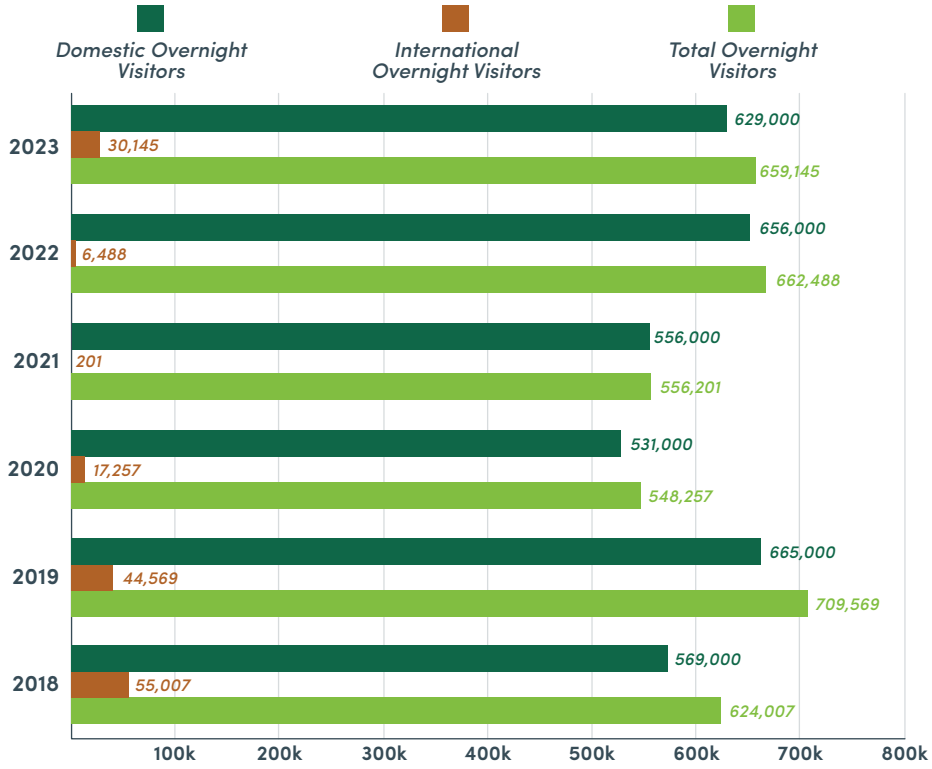
DOMESTIC OVERNIGHT VISITS, INTERNATIONAL OVERNIGHT VISITS AND TOTAL NIGHTS

According to the most recent visitation data available through Tourism Research Australia (for the year ending September 2023), the Mackay region (excluding Isaac):

1. Received approximately **659,145 overnight visitors**. Domestic visitors contributed close to 95% of all visitor nights received in the year ending September 2023, largely due to the region's very strong domestic business market, and low visitation from international markets;
2. The day trip market for the Mackay region is significant - with the destination receiving **1,018,000 day trip visitors** in the year ending September 2023;
3. The marginal majority of domestic overnight visitors in the year ending September 2023 travelled to the Mackay region for the **purpose of holiday**, followed very closely by **business travellers** and those **visiting friends and relatives** (VFR); and
4. During this year, **30% (189,000 overnight visitors)** of domestic overnight visitors travelled to the region for holiday/leisure purposes, followed by 29% (180,000 overnight visitors) and 26% 166,000 overnight visitors for business travellers and the VFR segment respectively. The source of these domestic overnight visitors was overwhelmingly split in the favour of intrastate markets, with a total of **533,000 domestic overnight visitors** travelling to the region from within Queensland.

Whilst the Mackay region experienced a decrease in overnight visitation due to the Covid - 19 Pandemic, the destination has been resilient with overnight visitation bouncing back strongly, and overall overnight visitation being at 93% of its pre-pandemic levels of visitation (year ending September 2019).

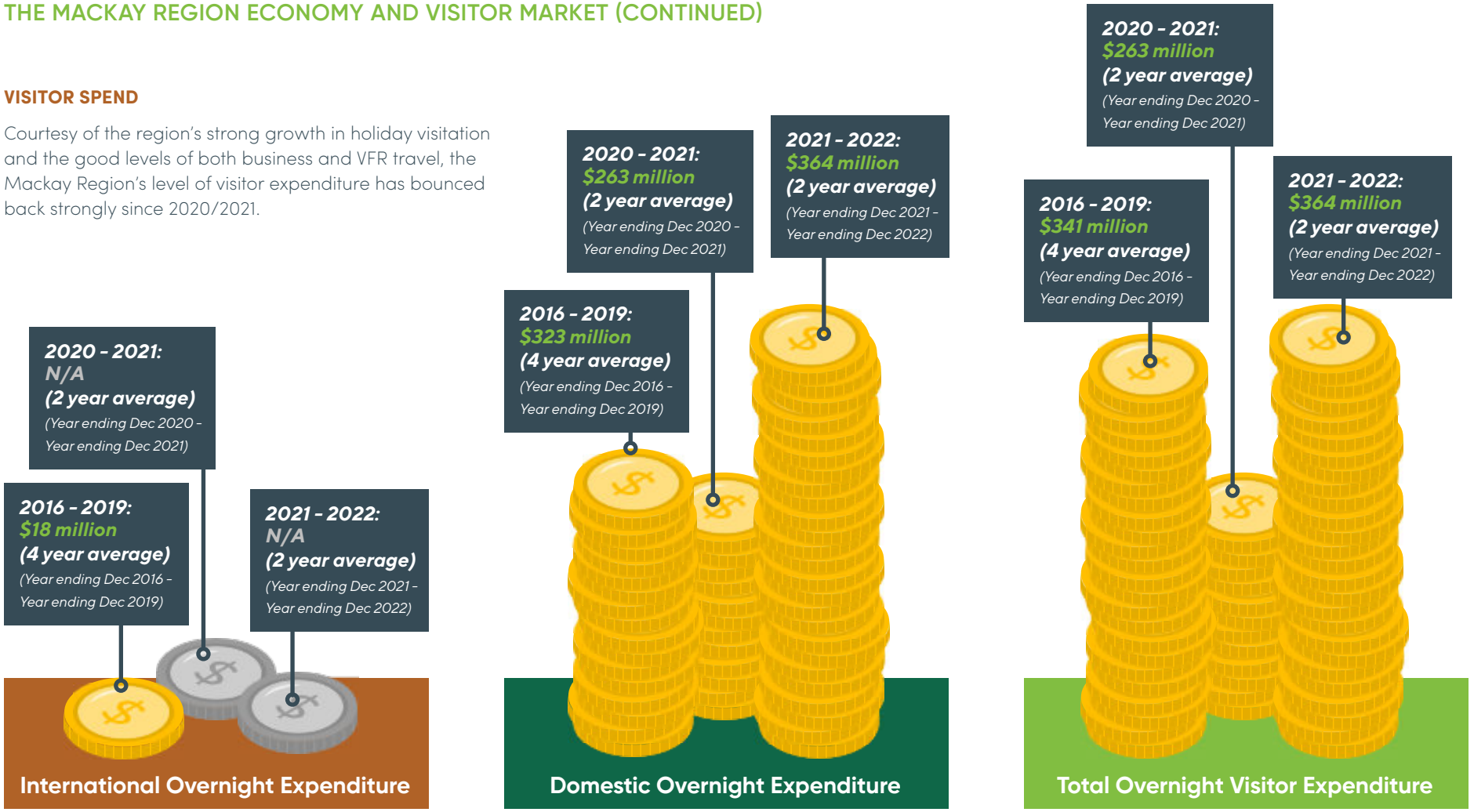
Domestic Overnight Visits, International Overnight Visits and Total Visits



Source: Tourism Research Australia, www.tra.gov.au , statistics year ending September 2018, 2019, 2020, 2021, 2022 and 2023.

VISITOR SPEND

Courtesy of the region's strong growth in holiday visitation and the good levels of both business and VFR travel, the Mackay Region's level of visitor expenditure has bounced back strongly since 2020/2021.



Source: Tourism Research Australia, www.tra.gov.au , statistics year ending December 2019, 2020, 2021 and 2022.

Fortunately for Mackay, the region is very dependent on domestic travel - which has served the destination well through the past few years. The loss of international visitors has been negligible, with international visitation only making up a very small percentage of the overall overnight visitation to the Mackay region.

3.3 Mackay Visitor Market Profile

As described above, the current visitor market to the Mackay Region is primarily driven to the region for the purposes of holiday, followed very closely by work or business, and the Visiting Friends and Relatives (VFR) segment.

> ***Whilst this close to equal mix of visitation has assisted the region to be particularly resilient over the past couple of years, it does highlight the emerging need for diversification, with tourism opportunities such as the cruise segment providing good avenues to drive further economic and social benefits.***

Tourism Research Australia (TRA) statistics for the year ending September 2023 demonstrates the region's solid performance in terms of overall visitation. In this timeframe, the region attracted close to **660,000 overnight visitors** (domestic and international), and **1,018,000 day trip visitors**.

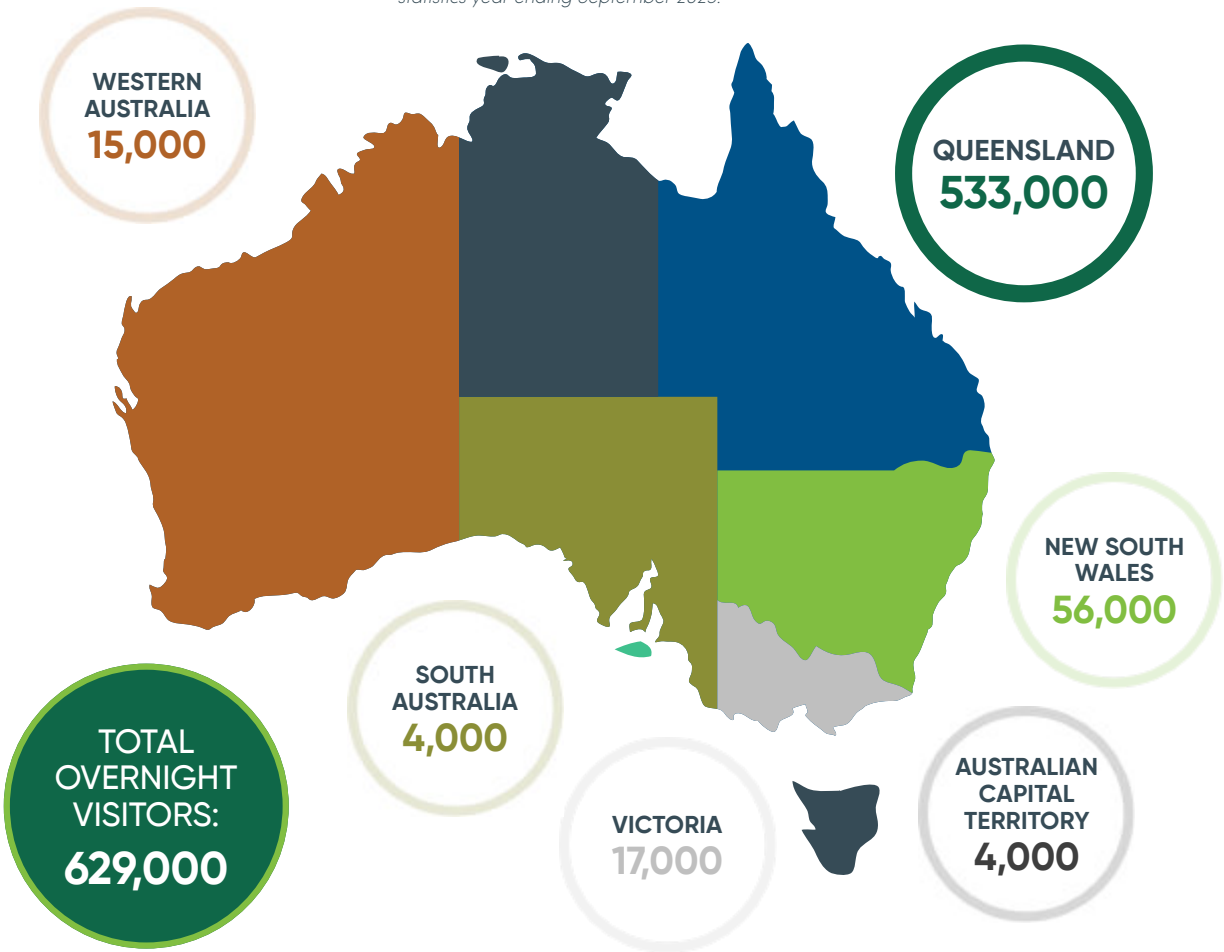
A deeper assessment of the Mackay Region's current market provides the following insights.

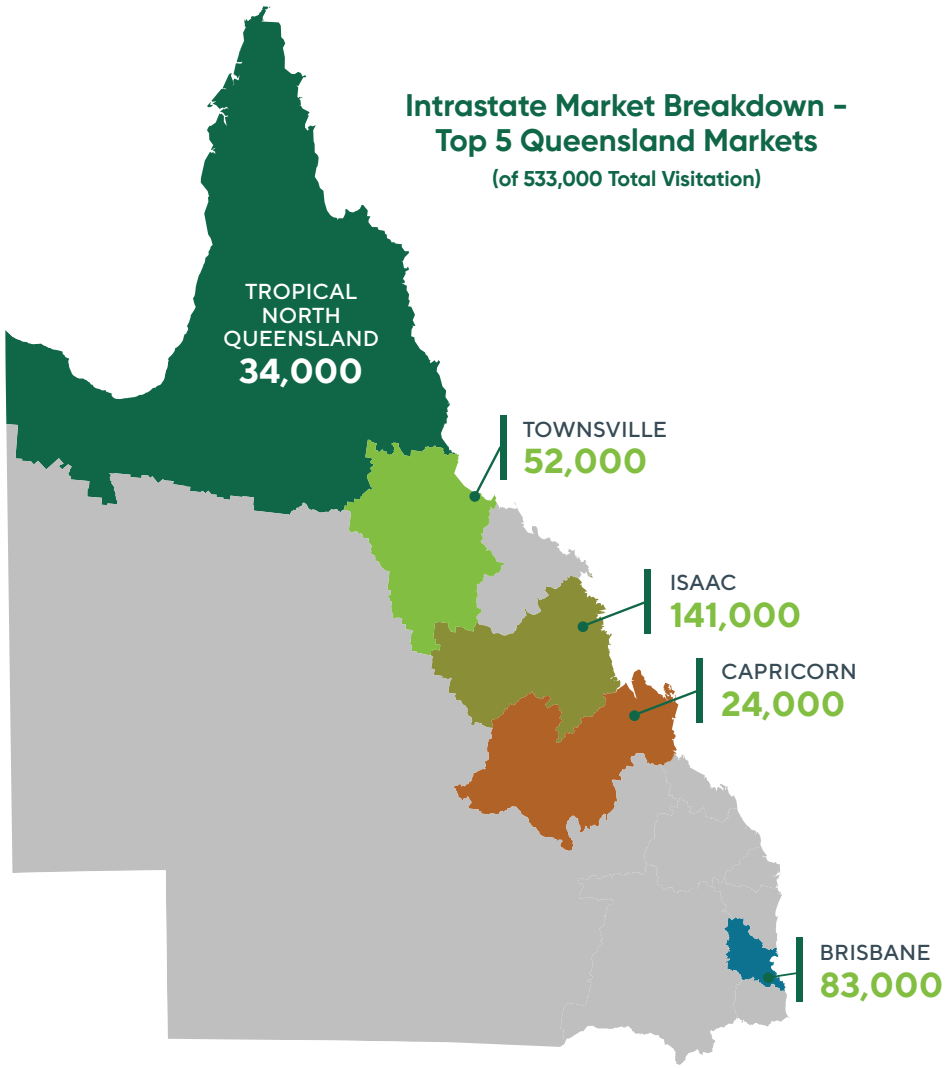
SOURCE MARKETS

Intrastate travel (visitors travelling from within Queensland) are overwhelmingly the largest source of overnight visitors. **80% of all overnight visitors** to the region in the year ending September 2023 travelled from within Queensland. A further breakdown of these geographic source markets can be seen opposite and below:

Source Markets by State

Source: Tourism Research Australia, www.tra.gov.au, statistics year ending September 2023.





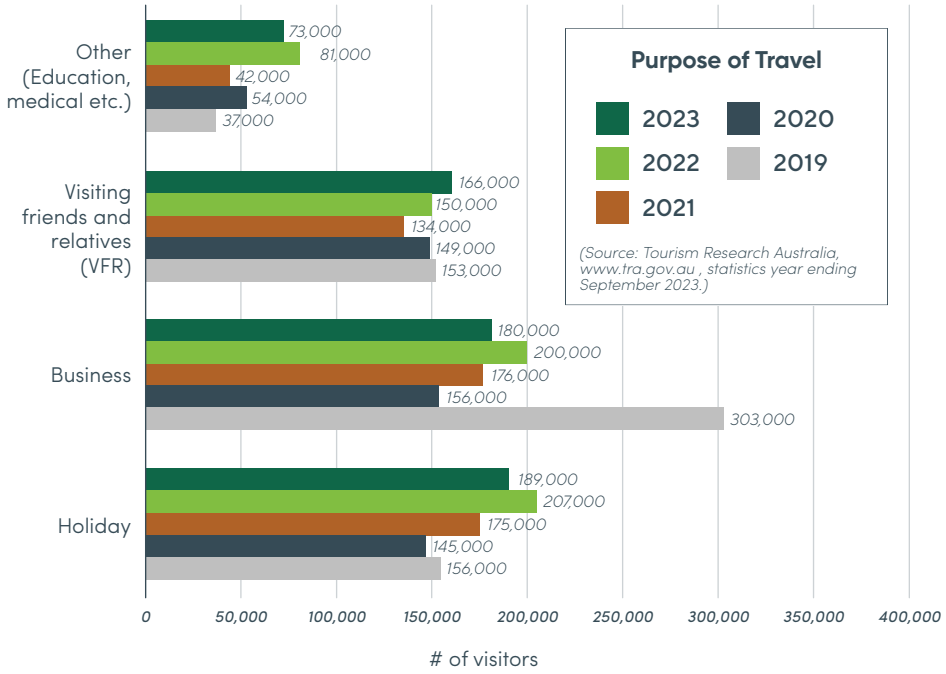
Part of Queensland	Overnight Visitors
Isaac	141,000
Brisbane	125,000
Sunshine Coast	26,000
Townsville	52,000
Capricorn	78,000
Whitsundays	23,000
Gladstone	3,000
Bundaberg	19,000
Tropical North Queensland	34,000
Fraser Coast	4,000
Gold Coast	11,000
Queensland Country	17,000
Outback Queensland	0
TOTAL	**533,000**

(Source: Tourism Research Australia, www.tra.gov.au , statistics year ending September 2023.)

THE MACKAY REGION ECONOMY AND VISITOR MARKET (CONTINUED)

PURPOSE OF TRAVEL

As detailed previously, visitation to the Mackay Region is currently quite evenly split between holiday travel, business travel and travel by the VFR segment as shown below.



Interestingly, business travel was (pre Covid-19) the strongest purpose of travel segment by some margin, with the segment experiencing a significant decrease since September 2019. Conversely, the holiday segment experienced strong growth of 21% between the years ending September 2019 and September 2023.

ACTIVITIES UNDERTAKEN

Further analysis of visitor activities whilst in the Mackay Region identifies those attributes that are appealing to current and future visitors.

Some activities, such as 'social activities' including dining out, visiting pubs and clubs, and shopping perform very strongly, however, 'social activities' are generally ranked very highly, if not the highest, for most tourism destinations. For more regional destinations like Mackay, it is generally the subsequent activities undertaken in the region that provide the best strategic insights.

Activities Undertaken	Overnight Visitors year ending September 2023	% of Total Overnight Visitors
Social Activities (dining out, shopping, visiting pubs and clubs)	483,000	77%
Outdoor/Nature (visit National Parks/State Parks, bushwalking)	187,000	30%
Active Outdoor/Sports (fishing, playing sports, golf, cycling, other activities)	117,000	19%
Local Attractions/Tourism Activities (guided tours/excursions, charter boat/ cruise, visit industrial tourist attractions)	13,000	2%
Arts/Heritage (visit museums or art galleries, experience Aboriginal culture, attend festivals and events, visit historic monuments)	34,000	5%
Other Activities	18,000	3%

(Source: Tourism Research Australia, www.tra.gov.au , statistics year ending September 2023.)

As can be seen above, the activities undertaken in the region align closely with the key experience offerings of the Mackay Region, being:

- Unique natural assets (Cape Hillsborough, Eungella);
- Camping and outdoor options;
- A rich cultural history; and
- A growing events calendar.

The outdoors in particular, National Parks, camping, bushwalking, fishing and visiting the beach all are prominent activities undertaken in the Mackay Region.

THE MACKAY REGION ECONOMY AND VISITOR MARKET (CONTINUED)

VISITOR DEMOGRAPHICS

In assessing the demographics of visitors to the Mackay Region, for the year ending September 2023, we used several different criteria, in line with TRA's demographic criteria which include:

DEMOGRAPHIC	OBSERVATIONS
Age Group	Interestingly, the most prominent age group amongst visitors to the Mackay Region for the year ending September 2023 was the 55 and over age group, with just over **35% of all visitors to the region being over the age of 55 yrs**. There may be some business related travel within this segment, however, it is more likely that this travel is being driven predominantly by the Grey Nomad segment, undertaking holiday and VFR related travel to the Isaac. The over 55 age group was then followed by the 50 - 54 age group (13%), and then by the 40 - 44 (10%).
Annual Household Income	Unsurprisingly, the annual household income of visitors to the Mackay Region is high, which would be driven primarily by business related travel. **33% of visitors to the region earned a household income of $200k +**, followed by visitors earning between $150k - $175k (10%) and then between $100k - $115k (9%).
Employment Status	The overwhelming majority of visitors to the region are **working full time at 64%**. This would be driven largely by the high level of business related travel, in particular FIFO workers. Retired visitors made up 16% of all overnight visitors in the year ending September 2023, followed by visitors working on a part time basis at 12%.
Gender	The split here is fairly even, with 53% of visitors being male, and 47% being female.
Marital Status	**63%** of all visitors to the region in the year ending September 2023 were either married, or in a relationship.
Lifecycle Group	15% of all visitors were classified as being an **'older, married working person'** with no children living in the household and 14% **parents with children under the age of 14 years**.

(Source: Tourism Research Australia, www.tra.gov.au , statistics year ending September 2023)

4 CRUISE SECTOR POTENTIAL AND MARKET

4.1 Economic and Social Impacts

The national economic impact of cruise tourism in Australia for 2022-23 is based on the aggregation of all passenger, crew and cruise line expenditure at each port or destination visited by a cruise ship during the season.

The 2022/23 cruise season brought higher levels of employment, a higher wages contribution, and record levels of economic output, despite a relatively late resumption of cruising in Australia which resulted in a slightly lower level of passenger visit days.

(Source: The Value of Cruise Tourism economic impact assessment for Australia was prepared by AEC Group on behalf of Cruise Lines International Association (CLIA) and the Australian Cruise Association).

The estimated national economic impacts generated by cruise tourism expenditure, converted to cruise tourism output, in Australia in 2022-23 is:

- Total output of $5.63 billion, including direct output of $2.5 billion;
- Total wages income of $1.82 billion, including $941 million in direct income and $878 million in indirect and induced wages income;
- Total supported employment of 18,225 full time equivalent positions (FTEs), including 9,869 direct positions and 8,365 indirect and induced positions; and
- Total value-added impact of $2.94 billion, including a direct impact of $1.32 billion.

4.2 Impact on Mackay

The cruise industry supply chain reaches deep into the Australian economy, delivering significant economic opportunities to suppliers across the country. Impacts on the Mackay region are difficult to quantify at such an early stage in the development of the sector.

At the least there are contributions to the economy that are: passenger related; vessel related; and crew related. Impacts could include:

- Minimal impacts in year one (anticipated 2026) as the visitation target and expectation is lower, however, considerable capacity building and preparatory work will have been done;
- Upon expansion of cruise visits according to the annual cruise ship targets (from 2026 three, 2027 five and 2028 ten), this influx of tourist spending could stimulate business activity, create job opportunities, and generate revenue for local businesses, suppliers, and service providers. This includes spending on shore excursions, dining, shopping, transportation, accommodations for pre- and post-cruise stays, and souvenirs;
- The above may accelerate as the confidence of multiple visits, collective competence and performance in hosting visits and standards are improved and maintained;
- Passenger and crew related benefits are perhaps the most obvious to occur, however, vessel related benefits will depend on the desire or motivation of the vessel owner to use Mackay port for food and beverage provisions, fuelling or power provision;
- The cruise tourism industry could diversify existing revenue streams and create employment opportunities; and
- Fostering a sense of community pride and engagement among local residents through the intended use of the Tourism Ambassadors sharing their training knowledge and passion for the destination.

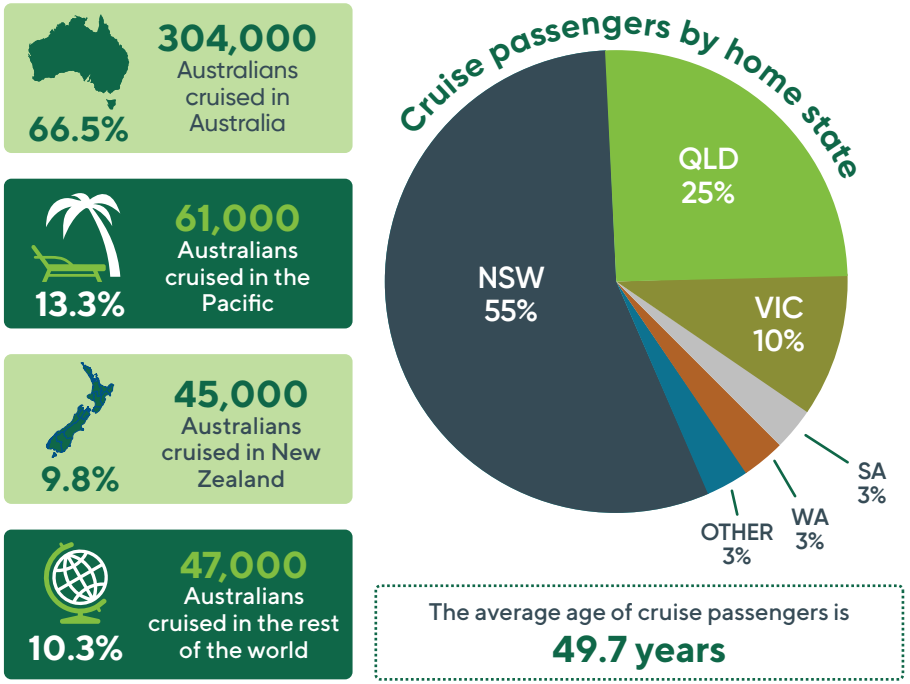
If MIT as the lead organisation wants to quantify the above, for example by replicating a version of the TEQ events reporting template, it would need to resource this and the process of collection and may need to weigh the benefits of having the data against its cost. Another pathway might be to collaborate with a university on a project to achieve the same and create a process and template based on real data gathered. Again, funding of this would need to be sought.

4.3 Cruise Market

Cruising's revival in Australia saw 457,200 Australians setting sail during the latter part of 2022. Despite a limited number of ships in the region and only a half year of local operations, CLIA's Source Market figure for the 2022 calendar year shows the Australian cruise market is making a swift recovery from its pandemic suspension.

Cruising Australians tend to be between 42-70 years in age. However, younger cruisers hold a steady share of the cruise market. For example, 8% of all Australian passengers are 12 years old or younger, 6% of passengers are aged between 13-19, 7% are between 20-29 years old, and 8% of passengers are aged between 30-39 years old.

The source of cruise passengers is shown below *(CLIA, 2022)*.



(Source: cruiseagency.com.au/news/australian-cruise-industry-statistics/)

5 TOURISM AUDIT

This section details the tourism experience and attraction audits for the Mackay Region. The overall objective was to determine what experiences and attractions are currently on offer, where they are located, and where the opportunities exist for potential cruise excursions/itineraries.

> ***This mapping will also assist in identifying gaps - how existing assets and opportunities correlate with proposed cruise ship visits and what might be needed in order to address some of these gaps and opportunities. This is a critical point of focus for this project.***

This audit is based predominantly on several key sources of information which include:

- The Australian Tourism Data Warehouse (ATDW) product database;
- The existing membership database of Mackay Isaac Tourism;
- TripAdvisor product/tourism experience/accommodation listings;
- Mackay region feedback/consultation; and
- Previous audit work undertaken through the ***Mackay Tourism Opportunity Analysis*** in 2020.

Whilst the Mackay region is not recognised as having a developed tourism sector like some of its neighbouring regions, such as the Whitsundays, the region does possess a number of significant natural assets and experiences that provide rich tourism experience development opportunities that will be very appealing to a cruise sector audience.

> ***Whilst there are currently a relatively small number of bookable (commissionable) tourism experiences on offer, the appeal for local businesses to develop new cruise focused tourism products and experiences will be boosted as increased exposure, and accessibility to a captive audience (cruise passengers) is pursued.***

5.1 Tourism Experiences/Attraction Audit and Key Findings

AUDIT METHODOLOGY

The audit captured those offerings considered to be primary tourism experiences (not those that are primarily utilised by the local community). To make the process of identifying gaps and opportunities easier, this audit details the region's experiences through several categories including:

- Land Based Tours;
- Marine Based Tours;
- Scenic Flights;
- Hire/Self Guided Experiences;
- Transport ;
- Museums and Cultural Attractions;
- Natural Attractions;
- Attractions;
- Food/Beverage Experiences;
- Art Experiences; and
- Parks and Gardens.

A few important notes to consider when reviewing the below information:

- 'General' cafes, restaurants and bars have been excluded from the audit so as not to skew the results. The audit only focuses on venues and facilities that provide unique experiences, such as cooking classes, breweries, etc; and
- Non-major beaches and lookouts are also excluded for the same reasons.

A full list of experiences identified is in **Appendix 2**.

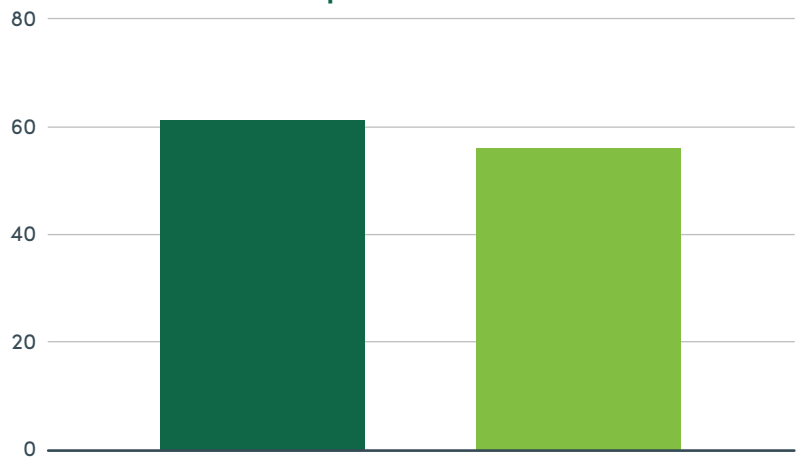
KEY FINDINGS

Some key points to note from the tourism experiences/attractions audit include:

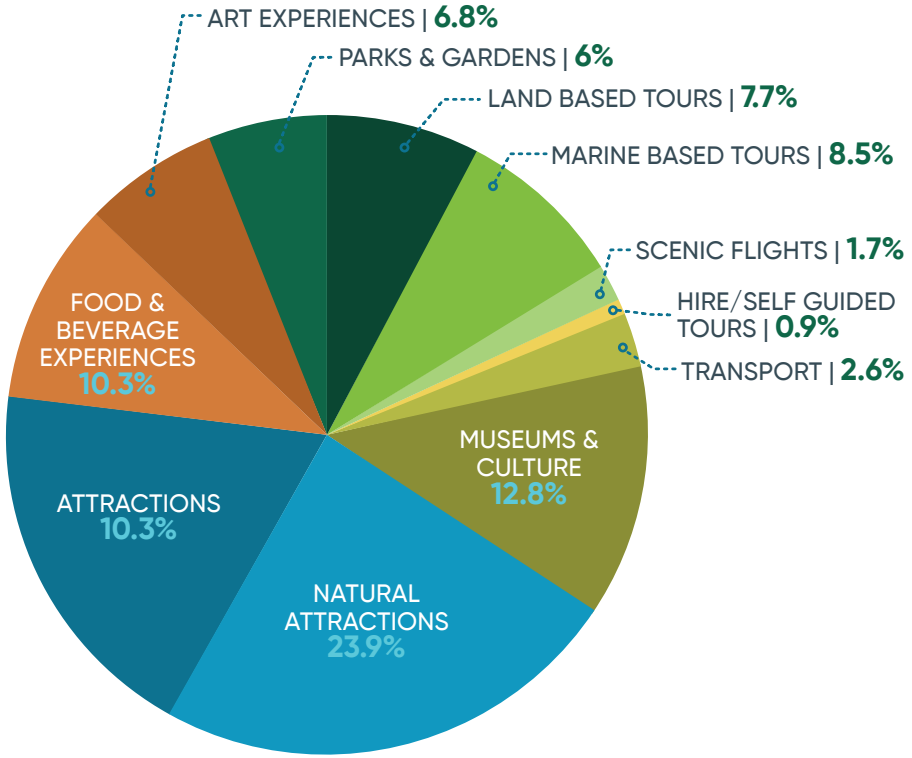
- 117 tourism experiences and attractions were identified that are currently on offer within the Mackay Region through this audit. Note that the audit undertaken uses several key sources and may not be an exhaustive list;
- The majority of experiences that are on offer are Natural Attractions, 24% of all on offer in the Mackay Region. Natural Attractions include those that are not man made, and include National Parks, islands or beaches;
- There is a good balance between 'free' and 'paid' experiences/attractions on offer in region, with 'free' accounting for 52% of all experiences, and 'paid' 48%; and
- 61% of all experiences/attractions (region's highest concentration) on offer throughout the Mackay Region are centred around Mackay City.

There is a good mix of both indoor and outdoor experiences/ attractions, demonstrating an ability for the Mackay Region to still cater for visitor needs on occasions where weather may be poor.

Breakdown of Experiences - Free versus Paid



Breakdown of Experiences/Attractions by Type



5.2 Tourism Audit and Potential Cruise Product Conclusions

As can be seen from the audit information above, the Mackay region has a good balance of paid vs free product, which is a positive in driving increased visitor dispersal and expenditure throughout the Mackay. This places the region in a competitive position compared to neighbouring cruise destinations, which may face the challenge of having little paid product in comparison to the inventory of free experiences/attractions on offer.

> ***The Mackay region also already has a good range of paid products/experiences that, with some assistance to become 'cruise ready', can quite easily cater for cruise visitors as a part of an excursion program for the first 12 months of cruise visitors to Mackay. The variety of experiences on offer is also a positive for the destination.***

There are, however, challenges that the Mackay region faces which is again evident from the audit conducted. This includes:

- Despite the strong agricultural sector within the Mackay region, there is very little on offer in terms of agri and farm based tourism experiences;
- The tourism sector in the Mackay region is not as developed, and not as aware of key product/experience development principles, such as the need for commissionable product, as other cruise destinations such as the Whitsundays. There is a need and opportunity to facilitate this process by providing additional support;
- Given the rich cultural history of the Mackay region, there is an opportunity to develop Indigenous cultural tourism experiences; and
- Many of the paid, nature based experiences and attractions (which accounts for a significant portion of paid Mackay experiences on offer) are located outside of Mackay City – in some cases close to two hours drive away. Seamless transportation options that form part of excursion experiences will be critical.

6 COMPETITOR ANALYSIS AND TECHNICAL / LOGISTICAL FIT

COMPETITOR ANALYSIS AND TECHNICAL / LOGISTICAL FIT (CONTINUED)

Cruise lines operate on itineraries, and therefore no one destination can operate in isolation. The growth of a neighbouring port may mean more business as cruise lines increase the number of ships heading to that port. Alternatively, it could signal a downturn, as cruise itineraries divert to the growing neighbour.

Therefore, while attracting cruise lines is a competitive landscape and a proactive approach is imperative to sustaining growth, collaboration with neighbouring cruise destinations on an itinerary is also critical to capture market share from global competitors. The implication is that Mackay should openly liaise and network either at state level through, for example TEQ led events, or with neighbouring ports on schedules, capacity and port facilities to maximise outcomes for each.

6.1 Gap Analysis and Potential Opportunities Assessment (Cruise Focus)

ENABLERS VERSUS BARRIERS

- The enablers and barriers for Mackay region as a cruise ship destination are each scored 1-5 below: 1=little impact and 5 = major impact (positive or negative).
- The nominal scoring is subjective but highlights those areas that most need attention and these are highlighted elsewhere in the Implementation Action Plan.

COMPETITOR ANALYSIS AND TECHNICAL / LOGISTICAL FIT (CONTINUED)

	ENABLERS	BARRIERS
Portside	First class port infrastructure. NQBP is very engaged and committed. Large successful commercial company. Several docking options are possible. (+5)	270 metre vessel limit (2024) subject to pilot training and the Harbour Master's approval. (-1)
Landside Transport	Excellent bus transport capacity. A major bus company is committed. Community and safety focussed. (+5)	Mackay CBD locations may be tested with high bus volumes for set down. (-3)
	Other smaller providers and transport/hire or boutique tour operators available. (+5)	Taxis can be difficult to get in Mackay. (-4)
Local Amenity and Attractions for hop on hop off loop	Accessible 8 km radius for the marina, riverside precinct, markets, cbd, hospitality, major shopping centres, arts trails and activities. (+4)	Scheduling plus MIT and MRC partnering needed. (-1)
Product	Ample product for first 6-12 months of cruise schedules. One and half hour radius for tours is very diverse. Opportunity to develop significant existing and new products and experiences within 2 years. (+4)	More difficult to access much of the Isaac region and the product is less developed. May need to activate helicopter tours. (-3)
People Capability	MIT has volunteers already, but they are not trained as 'cruise greeters'. (+1)	Number of volunteers needed will require coordination through MIT and local service clubs to have enough capacity. (-4)
	MIT has tourism and operator focussed roles already. (+4)	MIT needs to identify at least 6 months of catalytic additional support for the project and delineate/define the overlap between most roles as all will be needed to play a part. (-4)
	MRC has tourism and event staff. (+1)	MIT will also need to delineate who does what, and how coordination and collaboration will work with clear protocols and communication. (-2)
On Balance of Scores	**29**	**22**

COMPETITOR ANALYSIS AND TECHNICAL / LOGISTICAL FIT (CONTINUED)

Overall, it is evident that whilst some challenges remain, the Mackay region is well placed as a cruise ship destination, largely due to the excellent port facilities readily available, the very capable and engaged bus company with significant carrying capacity, and the fact that the port is within very close proximity to the Mackay CBD.

There is a net positive score of Enablers versus Barriers with critical infrastructure, a desire and motivation by key stakeholders to collaborate, accessible amenity and tourism operator readiness now and a desire to grow in the future, for the Mackay Cruise Ship Strategy to be successful.

OPPORTUNITIES AND GAPS

To further enhance and develop Mackay's excursion program offering, a gap analysis has been conducted based on several key criteria/sources:

- Consultation with key stakeholders and industry;
- Desktop research and analysis of the current experience/attraction offering (including the above audit); and
- Previous strategies that have been developed on behalf of the destination, including the region's most recent Destination Tourism Plan.

The opportunities to further improve Mackay's prospects as a cruise destination of choice lies predominantly in excursion product/experience development and people capacity development.

The critical challenges will be barriers in people capacity and the creation of a pool of cruise ready volunteers to deliver an effective and memorable 'welcome' experience for cruise visitors to the destination.

The Mackay region already hosts a variety of paid experiences suitable for cruise visitors, which could be integrated into an excursion program with minimal adjustments to become cruise-ready over the next year. There are, however, challenges evident from the audit conducted. These include:

- Despite the strong agricultural sector within the Mackay region, there is very little on offer in terms of agri and farm based tourism experiences;
- The tourism sector in the Mackay region is not as developed, and not as aware of key product/experience development principles (such as the need for commissionable product) as other more (tourism) mature cruise destinations such as the Whitsundays;

There is a need and opportunity to facilitate this process by providing additional support.

- Given the rich cultural history of the Mackay region, there is an opportunity to develop Indigenous cultural tourism experiences; and
- Many of the paid, nature based experiences and attractions (which accounts for a significant portion of paid Mackay experiences on offer) are located outside of Mackay City - in some cases close to two hours drive away.

Seamless and reliable transportation options that form part of excursion experiences will be critical to reach the Isaac.

COMPETITOR ANALYSIS AND TECHNICAL / LOGISTICAL FIT (CONTINUED)

THREE TOP OPPORTUNITIES

Additional support could help enhance this by considering the following three ideas.

OPPORTUNITY ONE - CRUISE SHIP DEVELOPMENT OFFICER

A Cruise Ship Development Officer for an intensive 6 month period who works closely with the Tourism Manager at MIT with a view to augmentation through a coordinated, staged and integrated (with other MIT staff) program of activities across stakeholders, cruise lines, onshore experience providers and local industry.

OPPORTUNITY TWO - 'CRUISE READY ACADEMY'

Consider a 12 month 'Cruise Ready Academy' (working title only) which includes a virtual place as well as training forums dedicated to assisting businesses and community organisations to develop their skills, and where applicable, to be trade ready, understand commissioning, take part in forums where cruise lines and shore experience providers are speakers, and as one outcome, continue to develop the 'esprit de corps' across tourism, community and service club volunteers

OPPORTUNITY THREE - TOURISM AMBASSADORS

Develop the capacity and number of trained, competent, professional and knowledgeable volunteers as Mackay Tourism Ambassadors. This could also be linked to the 'Cruise Ready Academy' project under its rallying banner. This aspect should align with an effort being led by Brisbane Economic Development Agency (BEDA) with Queensland government funding to produce a statewide rollout of their own excellent Welcome Program with all 13 Queensland RTOs. MIT could leverage this for local content development and its learning platform, then focus on other face to face aspects being liaison, training and leadership (and governance) of this group. This would be an MIT and MRC collaboration.

The 'Possible Experiences and Packages' section in this Strategy provides insight into some of the experiences and attractions that could be developed in the region to assist in further enhancing the cruise excursion program/experience.

7 STRATEGIC ANALYSIS

7.1 Cruise Ship Management in Mackay: Port Logistics, Scheduling, and Operational Coordination Analysis and Assessment

The port logistics will ultimately be led and directed according to the safety, capacity and operational needs or constraints of North Queensland Bulk Ports directed by its own requirements as well as those of the Harbour Master. However, beyond the marine and port operations decision-making, it is imperative to consider the operational needs of the bus transport provider and ultimately the passengers' customer experience.

THE POSITIVES

The salient positives are:

1. NQBP has identified some excellent options for handling cruise liners in its Wharf 3 and 4, and also Wharf 5. The former two are ideal from a marine and bus transport (passenger pick up/drop off) and a safety aspect; and
2. The port has a capacity for cruise liners up to 270 metres based on recent NQBP simulation modelling but will need to get the Harbour Master's approval and train pilots and, regardless of this, wind and weather related limits will always exist.

> ***The assessment is that the marine port facilities and capacity, and the ground transport capacity meet all requirements. All stakeholders will still need the flexibility to deal with short (within 48 hours) cancellations and changing weather conditions.***

7.2 Mackay Shore Excursion Programs: Shoreside Tour Development and Visitor Experiences Analysis and Assessment

CONSIDERATIONS FOR TOURISM OPERATORS

Availability and content of shore excursion programs are generally determined by the cruise ship companies through their shore excursion operator partner, ensuring the tours offered are tailored to their clients' needs. Once tours are agreed and contracted at the destination, the cruise ship companies can offer a wide range of targeted predetermined/pre-costed programs which they then heavily promote to passengers prior to the ship's arrival at port. Consider these:

- Official shore excursion tours also provide certainty for passengers: they can familiarise themselves with the itinerary and inclusions before arrival; they know the tours have been checked and are of high-quality; most importantly, they know that the ship will wait for them if for some reason the tour is held up; and that the cruise ship company will address issues on their behalf should they arise;
- Passengers who book these tours generally get priority disembarkation, and there is dedicated coach parking close to the ship for shore excursion coaches only;
- They create itineraries, contract coaches and guides and work with tourism operators/suppliers to deliver the program;
- Shore excursion operators are also in charge of logistical control of the shore program on the day; and
- They work with the on-board teams to ensure the right passengers get on the right tours and that everyone returns to the ship on time. Shore excursion operators may also provide hotel services and pre/post cruise holiday packages for passengers beginning or ending their cruise.

Consultation has highlighted that shore excursion operators will:

- Focus on reliable tour and transport operators;
- Need 12-18 months lead;

STRATEGIC ANALYSIS (CONTINUED)

- Sometimes need to cancel within 48 hours;
- Hire their own tour guides which must be well-trained;
- Work with tour operators to be cruise tour ready;
- Be contracted with one or more major cruise lines; and
- Readily present to MIT and industry to support cruise-readiness.

OFFERING TOURISM PRODUCT TO SHORE EXCURSION PROGRAMS

If the goal is to have your product offered in a cruise line's official shore excursion program, consider how operators will engage with cruise ship companies and shore excursion operators. It is important to:

1. Hold the appropriate licences and insurances for your business;
2. Provide appropriate net rates and terms and conditions; and
3. Maintain consistency in the quality and delivery of the experience or service.

It is essential for tourism operators to work closely with MIT on developing their own cruise offerings and products.

POSSIBLE EXPERIENCES AND PACKAGES

The table below shows potential packages and itineraries which are the starting point for experience development.

POTENTIAL PRODUCT/OFFERING EXAMPLES	CRUISE NEEDS & TIMINGS		CONSIDERATIONS FOR MIT
	4-6 HOUR	6-8 HOUR	
Short Term Ready/Priority			
Marine adventure experiences Boat adventure, Diving, Reef	✓	✓	What is ready/bookable? What could be packaged for a 6-8 hour stay?
Show the inherent difference of Mackay - surprise people RCOE, Hay Point Lookout and Sugar Shed	✓	✓	What could be packaged for a 6-8 hour stay? Or what could be combined with a second experience? Who leads this packaging? Itinerary, pricing and product needs defining.
Drop Off Loop River walk, CBD, Marina bus loop, markets, museums, art deco trail, arts	✓	✓	Assumed large bus capacity (48-61). Drop off locations need to be spaced, needs risk assessment for all areas and MRC liaison to avoid issues. Can this be MIT and MRC funded or a small fee paid? Who leads farmers' market coordination and liaison?
Land based adventures Cape Hillsborough Adventure sports	✓	✓	What is ready/bookable? What could be packaged for a 6-8 hour stay?
Helicopter tours Island, inland	✓	✓	What could be packaged for a 6-8 hour stay? Or what could be combined with a second experience? Who leads? Itinerary, pricing and product needs defining.
Local (non-Shore Experiences Company) - independently booked	✓	✓	Major opportunity for marina, foreshore walks, cultural experiences, coffee walks, anything done as price competitive with cruise line package experiences.
Crew well-being Bus loop to shops, medical clinics, sightseeing, beaches and recreation	✓	✓	Discuss with Stella Maris Seafarers on their interest and capacity.

POSSIBLE EXPERIENCES AND PACKAGES (CONTINUED)

POTENTIAL PRODUCT/OFFERING EXAMPLES	CRUISE NEEDS & TIMINGS		CONSIDERATIONS FOR MIT
	4-6 HOUR	6-8 HOUR	
Mid-Longer Term Ready/Priority			
Finch Hatton Gorge & Eungella Finch Hatton Gorge Bush walk Food experiences Mountain bikes, e-bikes hire		✓	May require a 4WD bus for Gorge (16-18 pax). MIT lead experience packaging and liaison. MUST get passengers back for sailing time, need contingency plans.
Isaac Region Show the inherent difference of Isaac - surprise people. Activate the Isaac Tourism Trails' potential Helicopter tours? Mackay to Clairview dugongs, nature tour Cape Palmerstone walk? Nebo pub, rodeo, museum, historical tour		✓	How can this be facilitated or made logistical? MIT to lead experience packaging and liaison or work with private operators. ***MUST get passengers back for sailing time, need contingency plans.***

COMMERCIAL INVESTMENT OPPORTUNITIES

Whilst there are a number of experiences that are either near ready, or can be developed without significant investment (as shown above), there are a number of experiences not currently available that would be well suited to the cruise segment, but need investment to become a reality.

Some of these opportunities (ascertained through consultation, the above audit and desktop research) may include the following:

TOUR TYPE/EXPERIENCE	DESCRIPTION	WHAT IS NEEDED
North Queensland Best of the Bush Tour.	Coach tour takes in Pioneer Valley, sugar industry, Eungella rainforest, platypus, Nebo for a sampled but genuine 'rodeo experience', museum and meal at Nebo pub.	Business Case: To define logistics, best route and ensure all products and experiences are of a high quality.
Mackay-Clareview Coastal Experience.	Clareview seagrass coastal flats, dugong experience, water activities.	Business Case: Defining the hero experiences, developing educational activities (families), interpretative centre/immersive experience, on water experience (adults), local foods.
Convenient Outback Aerial Experience.	Cross the coastal range, Peak Downs Ranges, high quality lunch on top of a peak (e.g. Lords Table Mountain), see Peak Downs and mining from above with storytelling.	Business Case: High end experience, needs defining, identifying partners, costing and optimal price point, target market (may align to specific cruise line operators only e.g. Expedition Cruises with higher end travellers).

To assist in seeing the above opportunities come to life, we recommend providing a facilitatory process (as outlined in the 'Strategies, Goals and Actions' section below) to provide mentoring and business case provision support to not only develop these products but to put these opportunities in the best position to attract private or public investment and funding.

It is important to note that different shore excursion providers will ultimately have the final say in excursion program offerings and experiences, and as such will look to adjust or 'tweak' excursion experiences based on the differing needs of cruise liners and their respective clientele. As such, a level of flexibility in experience offerings needs to be a key consideration.

STRATEGIC ANALYSIS (CONTINUED)

WHAT ARE CRUISE PASSENGERS SEEKING?

Some passenger behaviours include:

- Around 12% of Australians say they intend to cruise in the next six months (Deloitte access economics, August 2023);
- They often compare shore tour prices with similar online products and prices;
- They are very happy to go off on their own as they feel they already know Australian destinations;
- They will purchase if the offer is compelling – **that is, not something they would ordinarily be able to experience**;
- They often have preconceived ideas of Australian destinations so you will need to surprise them and break down preconceived stereotypes/perceptions;
- Millennials are the fastest growing group of Australian cruisers; and
- Post-pandemic cruise guests are younger and more digitally savvy. Many are cruising for the first time.

Travellers are seeking:

- To make a positive impact on the destinations they visit. This is particularly true of the high-end cruise lines that often attract well-travelled guests;
- Experiences that **showcase the natural environment, wildlife, and sustainability** of the area;
- Time, comfort, attentiveness, peace and space are the new luxury goods; cruise travellers want a hasslefree holiday;
- Travellers are looking for something more than a prepackaged offering as they **want a more personalised experience** and there is a continued desire for more shore excursions;
- Cruise ships used to be a destination in themselves but cruise visitor buying decisions are being driven more by the port destinations than the on-board facilities; and
- Guests value free time to explore the port and get a feel for the place.

Customer satisfaction of the onshore experience is a key metric cruise lines use in itinerary planning.

8 STRATEGIES, GOALS AND ACTIONS

8.1 Strategic Goals

The recommended Mackay Cruise Ship Strategy, Strategic Goals are shown below. These goals capture the strategic analysis and background assessment against Mackay region's capacity to be successful in the cruise ship market space.

	STRATEGIC GOAL	STRATEGIC INTENT
1	**Promote Mackay's port as a safe and highly appealing cruise destination.**	Promote Mackay's port as a secure and attractive destination for cruise ships by highlighting the port's safety measures alongside local attractions, cultural experiences, its CBD and Marina proximity and any unique selling points that make the destination stand out to cruise operators, inbound tourism companies and passengers.
2	**Provide industry support and capability building to ensure quality service, products and experiences are delivered to meet the expectations of cruise lines, shore excursions providers and passengers.**	Support businesses within the cruise tourism sector to ensure they can deliver high-quality services and experiences. This might include training programs and networking opportunities. This net covers a broad range of businesses including taxis, retailers and others outside of tourism and hospitality.
3	**Encourage investment in new products, experiences and destination infrastructure.**	Stimulate investment in new attractions, experiences and infrastructure that will enhance the cruise tourism experience in Mackay. This could involve working with local government, private investors, and community organisations to identify opportunities for development and provide support for projects that align with the overall strategy.
4	**Over time, increase the regional dispersal of passengers when they visit our region.**	Spread the economic benefits of cruise tourism beyond the immediate port area and into the wider region including Isaac. Strategies for achieving this could include promoting day trips and excursions to nearby attractions, encouraging passengers to explore surrounding areas further out, including the Isaac, and collaborating with local businesses to create packages and deals that incentivise spending outside of the port vicinity.
5	**Establish a governance framework to ensure the cruise sector grows and implementation is actioned.**	Put in place a structured framework for overseeing the growth of the cruise sector and ensuring the effective implementation of the strategy. This includes establishing a dedicated forum, defining MIT roles and responsibilities, setting performance indicators and targets, and regularly reviewing progress to make adjustments as needed.

8.2 Strategic Pillars

The following section highlights six 'pillars' and related actions that are recommended for implementation by all stakeholders to achieve the destination's cruise specific targets by the year 2028 and beyond.

Stakeholders that need to be involved in the delivery of these strategies and actions at a minimum, include:

ACRONYM	NAME
MIT	Mackay Isaac Tourism
TEQ	Tourism and Events Queensland
MRC	Mackay Regional Council
NQBP	North Queensland Bulk Ports
QTIC	Queensland Tourism Industry Council

The six Strategic Pillars and their related Strategic Actions set out below are also included in Appendix One – Implementation Action Plan alongside an additional commentary on: resources needed beyond current operational resources, the measures of success and targets, and priority rankings.

STRATEGIES, GOALS AND ACTIONS (CONTINUED)

PILLAR 1: CRUISE SHIP ATTRACTION

As Mackay seeks to enhance its profile as a premier cruise destination within Queensland, the strategic pillar of Cruise Ship Attraction focuses on cultivating robust relationships with cruise operators and enhancing the region's marketing efforts. This pillar aims to position Mackay prominently on the cruise tourism map through strategic partnerships, compelling promotional materials, and direct engagement with key industry players.

The actions outlined below are designed to build Mackay's reputation as an attractive, well-equipped, and memorable stop for cruise ships, ensuring that every opportunity to promote the region is expertly leveraged. By achieving the goals highlighted above, Mackay will not only increase its attractiveness to cruise lines but also ensure that the economic and social benefits of increased cruise traffic are realised.

ACTION NUMBER	ACTIONS	TIMEFRAME	ACTION OWNER + COLLABORATORS
1.1	Leverage the efforts of TEQ to promote Queensland and individual Queensland regions as viable cruise destinations. Opportunities may include: • Partner with TEQ to pursue either attendance or the provision of information at key trade events such as the ACA Conference, Sea Trade and CLIA 360; and • Engage directly with both international and domestic cruise line operators to highlight the advantages and opportunities of cruising in Mackay.	2024 - 2028	MIT owner +TEQ, MRC
1.2	Develop a range of collateral to assist in raising cruise line appeal and awareness of Mackay, such as: • A document providing an overview of the port, its facilities and other benefits; and • A brochure that details the range of possible shore excursions on offer, catering for a wide audience (high end, mid range, budget offerings).	2024	MIT owner + NQBP, TEQ, Local Industry
1.3	Facilitate and coordinate meetings (ideally in Mackay) with key cruise line and ground handler staff.	2024 - 2025	MIT owner +NQBP, MRC
1.4	Provide a single point of contact for engagement with the cruise industry.	2024	MIT owner +NQBP, MRC, Local Industry
1.5	Develop and assess the visitor experience – ensure local readiness and preparation. Emphasise the importance of professionalism, friendliness, and responsiveness in interactions with cruise lines and inbound tour companies to create a positive impression of the destination.	2024 - 2028	MIT owner +NQBP, MRC, Local Industry
1.6	Introduce incentive schemes such as reduced port fees (or at least at cost/loss leader) for initial cruise line visits by the end of 2025, aimed at attracting more cruise ships to the port of Mackay.	2024 - 2028	NQBP

PILLAR 2: ENHANCED INFRASTRUCTURE AND OPERATIONAL EXCELLENCE

The strategic pillar of Enhanced Infrastructure and Operational Excellence is crucial for solidifying Mackay's standing as a dependable and attractive cruise destination. This pillar focuses on optimising the operational framework and infrastructural capabilities to support cruise ship visitation effectively. The strategies under this pillar are designed to ensure that all operational aspects, from port facilities to passenger handling and emergency procedures, are robust, efficient, and aligned with best practices in the cruise industry.

By achieving these goals, Mackay will not only enhance its operational readiness but also demonstrate a commitment to high standards and continuous improvement, making it a preferred choice for cruise lines and enhancing the visitor experience.

ACTION NUMBER	ACTIONS	TIMEFRAME	ACTION OWNER + COLLABORATORS
2.1	Draft an *MIT Cruise Ship Visitation Procedures Manual* by using the pillar strategies as a guide, adding operational and MIT staffing details or actions. (See Appendix 4 for template)	July - December 2024	MIT owner
2.2	Establish quality assurance processes to monitor and evaluate the performance of the cruise ship program and identify areas for improvement: • Regular audits; • Feedback mechanisms to assess the effectiveness of operations; and • Address any issues or deficiencies promptly.	October 2024 - Dec 2024, ongoing	MIT owner +MRC, NQBP, transport providers
2.3	Draft a *Mackay Cruise Ship Visitation Procedures Manual* that sits alongside individual organisational procedures (e.g. NQBP, MRC). Include communications, port and bus operations contacts, passenger services, safety protocols, cancellations and emergency response plans.	2025	MIT owner +MRC, NQBP, transport providers
2.4	Fully integrate emergency response plans and safety protocols into the *Mackay Cruise Ship Visitation Procedures Manual,* enhancing the region's capacity to handle cruise ship-related emergencies efficiently.	2024 - 2025	NQBP owner +MRC, MIT, transport providers
2.5	Research and overtime, consider port enhancements that will align with cruise line sustainability targets (e.g. on shore power).	2026	NQBP owner +MIT, TEQ
2.6	Target no net environmental impacts of cruise ship operations, including reducing emissions, waste generation, and the ecological footprint of shore excursions	2028	NQBP, MRC, MIT, transport providers

PILLAR 3: WELCOMING AND ONSHORE EXPERIENCE

The Welcoming and Onshore Experience pillar is designed to create an inviting and enriching environment for cruise passengers once they disembark in Mackay. This pillar emphasises the importance of first impressions and aims to provide a memorable, positive introduction to the region through a variety of strategic actions. From the moment passengers step off the ship, the goal is to ensure they are greeted by knowledgeable and friendly local ambassadors and presented with a plethora of engaging activities and tours that showcase the best of what Mackay has to offer.

These strategies are tailored to enhance the overall visitor experience, foster a deeper connection with the destination, and encourage positive word-of-mouth that can attract further cruise visits. By achieving these goals, Mackay will enhance its reputation as a welcoming and vibrant cruise destination, capable of meeting and exceeding the expectations of international and domestic travellers alike.

ACTION NUMBER	ACTIONS	TIMEFRAME	ACTION OWNER + COLLABORATORS
3.1	Develop and launch a Tourism Ambassador and community engagement initiative (Welcome Program) aimed at establishing local tourism ambassadors and promoting positive onshore experiences: • This could be linked to the 'Cruise Ready Academy' (see 3.3) project under its rallying banner and should align with an effort being led by Brisbane Economic Development Agency (BEDA) with TEQ funding to produce a statewide rollout of their own excellent Welcome Program with all 13 Queensland RTOs and VICs; • Provide cruise passengers with maps, brochures, and personalised recommendations for exploring the destination, ensuring that staff are 'cruise ready'; and • Each shorex bus needs a tour guide and the shorex company pays per hour for guides which is an incentive for Ambassadors.	2025 - 2028	MR+MIT owners +TEQ, Local Industry, Service Clubs
3.2	Work with industry to develop a range of diverse experiences to form a part of the Mackay Region's cruise excursion program. Considerations should be given to: • Having some shorter touring options and longer touring options available; • Developing experiences to cater for a wide audience, including high end, mid range, budget and family focused experiences; and • Developing specialised local offerings (resource sector, agri, food, arts, craft) to differentiate Mackay.	2024 - 2028	MIT owner +MRC, TEQ, Local Industry
3.3	Consider a 12 month 'Cruise Ready Academy' (working title only) which is a virtual place as well as training forums dedicated to assisting businesses and community organisations to develop their skills, and where applicable, to be trade ready, understand commissioning. Take part in forums where cruise lines and shore experience providers are speakers, focusing on how to best serve the cruise market and collaborate with shore excursion providers.	2024 - 2028	MIT owner +MRC

STRATEGIES, GOALS AND ACTIONS (CONTINUED)

ACTION NUMBER	ACTIONS	TIMEFRAME	ACTION OWNER + COLLABORATORS
3.4	Coordinate community-driven events and enhancements in Mackay's CBD and riverside areas to coincide with cruise visits by 2027, enriching the urban environment and engagement during these times. These could be temporal for example a single day art installation, temporary wayfinding, and not permanent or costly fixtures.	2025 - 2028	MIT owner MRC
3.5	Evaluate and establish a hop on hop off transportation service for cruise visits between the port and Mackay's central areas by 2027 to ensure convenient access for passengers wishing to explore the city.	2026	MIT owner Bus companies
3.6	Implement a system for collecting feedback from cruise passengers about their onshore experiences and use this information to continuously improve and tailor offerings to meet their preferences and expectations.	2025 - 2028	MIT owner +MRC
3.7	Facilitate an experience and product development program specifically targeting cruise opportunities to educate tour operators on how best to work with shore excursion providers and cruise lines.	2025 - 2028	MIT owner +Local Industry, TEQ, QTIC
3.8	Consider a *Cruise Ship Development Officer* for an intensive 6-12 month period to work closely with the Tourism Manager at MIT with a view to augmentation through a coordinated, staged and integrated (with other MIT staff) effort across stakeholders, cruise lines, onshore experience providers, local industry, etc.	2024	MIT owner +funders

STRATEGIES, GOALS AND ACTIONS (CONTINUED)

PILLAR 4: ENGAGEMENT AND COLLABORATION

The Engagement and Collaboration pillar is crucial for building a strong foundation of support and cooperation among various stakeholders in Mackay's cruise ship industry. This pillar aims to establish and deepen relationships with cruise lines, local businesses, service providers, and government entities to ensure a coordinated approach to developing Mackay as a cruise destination. Through a structured Engagement Plan, this pillar will facilitate the sharing of insights, expectations, and needs between Mackay and its partners, enabling tailored solutions and initiatives that enhance the overall cruise experience.

The strategic actions within this pillar are designed to foster long-term partnerships that will support sustainable growth in cruise tourism, leveraging these relationships to create a more attractive and competitive destination for cruise lines and their passengers.

ACTION NUMBER	ACTIONS	TIMEFRAME	ACTION OWNER + COLLABORATORS
4.1	Create an industry Engagement Plan on the cruise market: • Firstly an intensive 6 month (July to December 2024); then • Less intensive January - June 2025. Include shore excursion providers as speakers, industry speakers, key stakeholders NQBP, bus transport, MRC, etc.	July - December 2024 ongoing	MIT owner +MRC, industry
4.2	Leverage relationships established by TEQ, work closely with cruise lines to understand their needs and expectations. Tailor facilities and services to meet these demands.	July - December 2024 ongoing	MIT+NQBP owners +TEQ
4.3	Develop and maintain robust communication channels with all partners to ensure efficient information sharing and collaboration, fully operational by mid-2025.	2025 - 2028	MIT owner +TEQ, NQBP
4.4	Create customised partnership programs by the end of 2024 that address the specific needs and expectations of cruise lines and other industry players, aiming to facilitate smooth operations and enhanced visitor experiences.	2025 - 2028	MIT owner +TEQ, NQBP, transport providers

PILLAR 5: ONGOING PROMOTION AND POSITIONING

The strategic pillar of Ongoing Promotion and Positioning is fundamental to sustaining and growing Mackay's profile as a vibrant cruise destination. This pillar focuses on continuous engagement with the cruise industry and the strategic use of marketing to ensure Mackay remains top of mind among cruise lines, tour operators and potential visitors. Through dynamic promotional strategies, this pillar aims to capitalise on emerging opportunities and adapt to changing market conditions. The initiatives under this pillar include revising funding models to support cruise-related marketing, integrating cruise objectives into broader tourism plans, and developing collaborative partnerships that leverage the unique strengths of Mackay.

By actively promoting the destination and effectively positioning it within the global cruise market, Mackay aims to attract more visitors and enhance the economic benefits of cruise tourism for the region.

ACTION NUMBER	ACTIONS	TIMEFRAME	ACTION OWNER + COLLABORATORS
5.1	Revise the current agreed MIT:MRC annual funding plan to include cruise sector engagement and marketing. Plan to be reviewed and revised appropriately each year.	2024 - 2025	MIT owner +MRC
5.2	Review the DTP to include specific Cruise Ship Strategy goals.	2026 - 2028	MIT owner, Local industry
5.3	Work with cruise lines and bus companies to develop collaborative packages and itineraries that showcase the best of the destination. This could include pre and post-cruise extensions, shore excursion packages, and themed tours that highlight the destination's unique attractions and experiences.	2024 - 2028	MIT owner +tourism industry, transport providers
5.4	Collaborate with NQBP, MRC and TEQ to develop joint marketing campaigns that promote the destination as an attractive cruise destination to cruise lines and inbound tour operators.	2024 - 2028	MIT owner +NQBP, MRC, TEQ
5.5	Attend industry events such as cruise trade shows, conferences, and networking events to showcase the destination and to build relationships, exchange information and discuss potential collaboration opportunities.	2024 - 2028	MIT owner +TEQ, MRC, NQBP
5.6	Organise familiarisation tours and site visits for representatives from cruise lines and inbound tour operators to experience the destination firsthand as a compelling cruise destination.	2024 - 2028	MIT owner +TEQ, Tourism industry, NQBP

PILLAR 6: GOVERNANCE AND MONITORING

The Governance and Monitoring pillar is crucial for the structured and systematic implementation of the Mackay Cruise Ship Strategy. This pillar emphasises the importance of clear leadership, defined roles, and collaborative processes to ensure that all actions and strategies are effectively overseen and executed. Through the establishment of solid governance structures, Mackay will ensure that its cruise ship strategy is not only implemented according to plan but also adaptable to new opportunities and challenges.

The initiatives under this pillar aim to foster an environment of accountability and continuous improvement, crucial for the long-term success of Mackay as a cruise destination. By prioritising effective governance, the region can better coordinate its efforts, manage resources efficiently, and achieve the strategic objectives laid out in the broader cruise ship strategy.

ACTION NUMBER	ACTIONS	TIMEFRAME	ACTION OWNER + COLLABORATORS
6.1	Prioritise strategy and actions from the *Mackay Cruise Ship Strategy* into MIT work plans. Clearly delineate an internal lead role inside MIT and describe where this overlaps with any contracted term-defined staff with those of other staff, emphasising that all will have a role.	July 2024 - ongoing	MIT owner +MRC, NQBP, TEQ, Local Industry
6.2	Consider the evolution of the *Mackay Cruise Ship Strategy Working Group* to an informal and more inclusive *Mackay Cruise Ship Forum* (to be named) with the considerations or elements included as ideas in Appendix 3 that could form a Terms of Reference to guide your decision.	July 2024 - ongoing	MIT owner +MRC, NQBP, industry representatives from transport and tourism
6.3	Define and establish a dedicated internal lead role for the Mackay Cruise Ship Strategy within MIT, ensuring clarity in responsibilities and coordination across all stakeholders.	2024	MIT owner
6.4	Initiate an annual review process of the cruise ship strategy starting in 2025 to adapt to changing industry conditions and stakeholder feedback, ensuring the strategy remains, resourced, relevant and effective.	2025	MIT owner +governance forum

9 RISK ASSESSMENT

9.1 Risk Management and Monitoring

The table below details the primary risks confronting the Mackay Cruise Ship Strategy.

CONSEQUENCE (C)					
	Insignificant	Minor	Moderate	Major	Catastrophic
Rare	Low	Low	Moderate	Moderate	High
Unlikely	Low	Low	Moderate	Moderate	High
Possible	Low	Moderate	High	High	High
Likely	Moderate	Moderate	High	High	Extreme
Almost Certain	Moderate	High	High	Extreme	Extreme

LIKELIHOOD RATING	
Likelihood	Description
Almost Certain	The event is expected to occur in most circumstances
Likely	The event will probably occur in most circumstances
Possible	The event should occur at some time
Unlikely	The event could occur at some time
Rare	The event may occur only in exceptional circumstances

	RISK DESCRIPTION	LIKELIHOOD	CONSEQUENCES	RISK RATING	MITIGATION STRATEGY
1.	Failure to remain unified on the vision and "why" of this initiative.	possible	major	high	Splintering can be lessened with a *Mackay Cruise Ship Forum* as an inclusive focal point for primary stakeholders and creating vitality and information sharing at its core.
2.	Key partnerships with NQBP, MRC and industry fail.	possible	major	high	Use the *Mackay Cruise Ship Forum* to govern and drive, ensure MIT has a clear lead and delineated cruise ship roles, partner on packaging and sophisticated promotion efforts. Appoint a cruise ship tourism lead.
3.	Covid restrictions and border closures.	possible	catastrophic	high	Any mandatory Covid 19 plans will be in place. Any new interruption could be very serious to, or at least suspend, the Strategy.
4.	Failure to secure enough investment and expansion of product and cruise ready experiences.	possible	major	high	Collaborate with tour operators and local attractions to improve the quality and diversity of onshore experiences. Implement capacity building actions.

STRATEGIES, GOALS AND ACTIONS (CONTINUED)

	RISK DESCRIPTION	LIKELIHOOD	CONSEQUENCES	RISK RATING	MITIGATION STRATEGY
5.	Failure to recruit and retain enough Tourism Ambassadors.	possible	major	high	Create a *Welcome and Ambassadors Program* that includes training on hospitality, cultural sensitivity, local knowledge, and communication skills to ensure a warm and welcoming experience for visitors.
6.	Inability to find resources or funding to adequately progress the Strategy.	likely	major	high	Utilise current funding avenues or delay progression until resources are freed for at least an additional contractor/staff support as recommended.
7.	Adverse weather causing cancellations.	likely	major	high	Need to have clear communications to manage onshore experience operators expectations. Maintain crisis planning and procedures.

10 MONITORING

MONITORING (CONTINUED)

The Plan should be monitored in several scheduled and systematic ways:

1. Do an annual review of the Strategy and the suggested procedures or governance;
2. Use the Implementation Action Plan to monitor implementation using a simple traffic light system, monitoring this quarterly:

- Red = nothing done/not started
- Amber = started/in progress
- Green = completed

11 APPENDICES

11.1 Appendix One - Implementation Action Plan

Priorities Key

KEY	
M	MUST IMPLEMENT IN 0-12 MONTHS
S	SHOULD IMPLEMENT IN 1-3 YEARS
O	OPPORTUNITY IN FUTURE/ASPIRATIONAL
CGC	CRITICAL OR GAME CHANGER (CGC)

Strategic Pillars (to deliver Goals)	Actions (summary only as detail in Strategy)	Timeframe	Action Owner + collaborators	Resources Needed (beyond assumed current operational resources)	Measurement of Success and Targets	PRIORITY
Pillar 1: Cruise Ship Attraction	1.1. Leverage the efforts of TEQ to promote Queensland and individual Queensland regions as viable cruise destinations. Opportunities may include: • Partner with TEQ to pursue either attendance or the provision of information at key trade events such as the ACA Conference, Sea Trade and CLIA 360; and • Engage directly with both international and domestic cruise line operators to highlight the advantages and opportunities of cruising in Mackay.	2024 - 2028	MIT owner +TEQ, MRC	Nil	Inclusion in TEQ cruise related collateral, and featured at cruise specific trade events attended by TEQ.	**S**

Continued on following page/s.

APPENDICES (CONTINUED)

Strategic Pillars (to deliver Goals)	Actions (summary only as detail in Strategy)	Timeframe	Action Owner + collaborators	Resources Needed (beyond assumed current operational resources)	Measurement of Success and Targets	PRIORITY
Pillar 1: Cruise Ship Attraction (continued)	1.2. Develop a range of collateral to assist in raising cruise line appeal and awareness of Mackay, such as: • A document providing an overview of the port, its facilities and other benefits; and • A brochure that details the range of possible shore excursions on offer, catering for a wide audience (high end, mid range, budget offerings).	2024	MIT owner + NQBP, TEQ, Local Industry	Nil add to marketing output	Development and distribution of collateral detailing the benefits and appeal of the Mackay region for cruise liners.	**CGC**
	1.3. Facilitate and coordinate meetings (ideally in Mackay) with key cruise line and ground handler staff.	2024 - 2025	MIT owner +NQBP, MRC	May need additional 2024/2025 budget line allocation for MIT	Facilitate a minimum of 3 meetings with key cruise line and ground handler organisations. Establish partnerships with at least five major cruise lines and industry stakeholders.	**M**
	1.4. Provide a single point of contact for engagement with the cruise industry.	2024	MIT owner +NQBP, MRC, Local Industry	Nil	Appointment of dedicated cruise industry contact. Overall Visitation Targets: 3 cruises 2026, 5 cruises 2027 and 10 cruises 2028.	**M**

Continued on following page/s.

Strategic Pillars (to deliver Goals)	Actions (summary only as detail in Strategy)	Timeframe	Action Owner + collaborators	Resources Needed (beyond assumed current operational resources)	Measurement of Success and Targets	PRIORITY
Pillar 1: Cruise Ship Attraction (continued)	1.5. Develop and assess the visitor experience – ensure local readiness and preparation. Emphasise the importance of professionalism, friendliness, and responsiveness in interactions with cruise lines and inbound tour companies to create a positive impression of the destination.	2024 - 2028	MIT owner +NQBP, MRC, Local Industry	Nil	Finalisation of cruise 'welcome' or 'ambassador' program, and the development of an excursion program featuring a minimum of 10 Mackay experiences.	**S**
	1.6. Introduce incentive schemes such as reduced port fees (or at least at cost/loss leader) for initial cruise line visits by the end of 2025, aimed at attracting more cruise ships to the port of Mackay.	2024 - 2028	NQBP owner +MIT	Needs NQBP determination	Confirmation and subsequent communication of incentive schemes to cruise line companies.	**S**

APPENDICES (CONTINUED)

Strategic Pillars (to deliver Goals)	Actions (summary only as detail in Strategy)	Timeframe	Action Owner + collaborators	Resources Needed (beyond assumed current operational resources)	Measurement of Success and Targets	PRIORITY
Pillar 2: Enhanced Infrastructure and Operational Excellence	2.1. Draft an *MIT Cruise Ship Visitation Procedures Manual* (an example/template for completion is shown in Appendix Four) by using the pillar strategies as a guide, adding operational and MIT staffing details or actions.	July - December 2024	MIT owner	Nil	All operational practices standardised consistently across all touchpoints. Finalisation of manual.	**M**
	2.2. Establish quality assurance processes to monitor and evaluate the performance of the cruise ship program and identify areas for improvement: • Regular audits; • Feedback mechanisms to assess the effectiveness of operations; and • Address any issues or deficiencies promptly.	October 2024 - Dec 2024	MIT owner +MRC, NQBP, transport providers	Nil	Finalisation of the quality assurance process and relevant documentation.	**M**
	2.3. Draft a *Mackay Cruise Ship Visitation Procedures (e.g. NQBP, MRC). Manual* that sits above/ alongside individual organisational procedures. Include communications, port and bus operations contacts, passenger services, safety protocols, cancellations and emergency response plans.	2025	MIT owner +MRC, NQBP, transport providers	Nil	All operational practices standardised consistently across all touchpoints. Finalisation of manual.	**M**
	2.4. Fully integrate emergency response plans and safety protocols into the *Mackay Cruise Ship Visitation Procedures Manual*, enhancing the region's capacity to handle cruise ship-related emergencies efficiently.	2024 - 2025	NQBP owner +MRC, MIT, transport providers	Nil	All emergency response plans and safety protocols integrated into manual.	**M**

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APPENDICES (CONTINUED)

Strategic Pillars (to deliver Goals)	Actions (summary only as detail in Strategy)	Timeframe	Action Owner + collaborators	Resources Needed (beyond assumed current operational resources)	Measurement of Success and Targets	PRIORITY
Pillar 2: Enhanced Infrastructure and Operational Excellence (continued)	2.5. Research and overtime, consider port enhancements that will align with cruise line sustainability targets (e.g. on shore power).	2026	NQBP owner +MIT, TEQ	NQBP determination	Finalise a report that details the possible port enhancements and associated costs.	O
	2.6. Target no net environmental impacts of cruise ship operations, including reducing emissions, waste generation, and the ecological footprint of shore excursions.	2028	NQBP, MRC, MIT, transport providers	Costs will depend on items identified	Audit conducted each 2 years. Target zero net environmental impacts.	O

APPENDICES (CONTINUED)

Strategic Pillars (to deliver Goals)	Actions (summary only as detail in Strategy)	Timeframe	Action Owner + collaborators	Resources Needed (beyond assumed current operational resources)	Measurement of Success and Targets	PRIORITY
Pillar 3: Welcoming and Onshore Experience	3.1. Develop and launch a Tourism Ambassador and community engagement initiative (Welcome program) aimed at establishing local tourism ambassadors and promoting positive Onshore experiences: • This could also be linked to the 'Cruise Ready Academy' project under its rallying banner and should align with an effort being led by Brisbane Economic Development Agency (BEDA) with TEQ funding to produce a statewide rollout of their own excellent Welcome Program with all 13 Queensland RTOs and VICs; • Provide cruise passengers with maps, brochures, and personalised recommendations for exploring the destination, ensuring that staff are 'cruise ready'; and • Each shorex bus needs a tour guide and the shorex company pays per hour for guides which is an incentive for Ambassadors.	2025 - 2028	MR+MIT owners +TEQ, Local Industry, Service Clubs	MIT will need a resource allocation to support staff and contracted staff to ensure this is optimised. (approximate cost $20,000)	Finalisation and launch of cruise 'welcome' or 'ambassador' program.	**CGC**

Continued on following page/s.

APPENDICES (CONTINUED)

Strategic Pillars (to deliver Goals)	Actions (summary only as detail in Strategy)	Timeframe	Action Owner + collaborators	Resources Needed (beyond assumed current operational resources)	Measurement of Success and Targets	PRIORITY
Pillar 3: Welcoming and Onshore Experience (continued)	3.2. Work with industry to develop a range of diverse experiences to form a part of the Mackay Region's cruise excursion program. Considerations should be given to: • Having some shorter touring options and longer touring options available; • Developing experiences to cater for a wide audience, including high end, mid range, budget and family focused experiences; and • Developing specialised local offerings (resource sector, agri, food, arts, craft) to differentiate Mackay.	2024 - 2028	MIT owner +MRC, TEQ, Local Industry	Nil	Develop, promote and launch a cruise excursion program featuring a minimum of 10 Mackay experiences.	**CGC**
	3.3. Consider a 12 month 'Cruise Ready Academy' (working title only) which is a virtual 'place' as well as training forums dedicated to assisting businesses and community organisations to develop their skills, and where applicable, to be trade ready, understand commissioning. Take part in forums where cruise lines and shore experience providers are speakers, focusing on how to best serve the cruise market and collaborate with shore excursion providers.	2024 - 2028	MIT owner	MIT will need a resource allocation to support staff and contracted staff to ensure this is optimised (approximate cost $10,000-$20,000 may tie to Action 3.7).	Successfully obtain funding and appoint a suitably qualified consultant(s) to develop and implement the program.	**S - O**

Continued on following page/s.

Strategic Pillars (to deliver Goals)	Actions (summary only as detail in Strategy)	Timeframe	Action Owner + collaborators	Resources Needed (beyond assumed current operational resources)	Measurement of Success and Targets	PRIORITY
Pillar 3: Welcoming and Onshore Experience (continued)	3.4. Coordinate community-driven events and enhancements in Mackay's CBD and riverside areas to coincide with cruise visits by 2028, enriching the urban environment and engagement during these times. These could be temporal for example a single day art installation, temporary wayfinding, and not permanent or costly fixtures.	2025 - 2028	MIT owner +MRC	Nil	Finalise a cruise specific CBD and Riverside Events Activation Plan.	**S**
	3.5. Evaluate and establish a hop on hop off transportation service for cruise visits between the port and Mackay's central areas to ensure convenient access for passengers wishing to explore the city.	2026	MIT owner +Bus companies	Nil - should be cost neutral with small fee per passenger	Establishment and promotion of a hop on hop off transportation service as a part of the cruise excursion program.	**S**
	3.6. Implement a system for collecting feedback from cruise passengers about their onshore experiences and use this information to continuously improve and tailor offerings to meet their preferences and expectations.	2025 - 2028	MIT owner +MRC	Nil	Conduct an annual stakeholder survey. Target an 80% level of satisfaction among stakeholders. Achieve a 90% satisfaction rate from cruise line feedback on local readiness and responsiveness.	**S**
	3.7. Facilitate an experience and product development program specifically targeting cruise opportunities to educate tour operators on how best to work with shore excursion providers and cruise lines.	2025 - 2028	MIT owner +Local Industry, TEQ, QTIC	Targeted more at business cases, developing new opportunities (approximately $20,000-$25,000).	Successfully obtain funding and appoint a suitably qualified consultant(s) to develop and implement the program.	**S**

Continued on following page/s.

Strategic Pillars (to deliver Goals)	Actions (summary only as detail in Strategy)	Timeframe	Action Owner + collaborators	Resources Needed (beyond assumed current operational resources)	Measurement of Success and Targets	PRIORITY
Pillar 3: Welcoming and Onshore Experience (continued)	3.8. Consider a Cruise Ship Development Officer for an intensive 6-12 month period who works closely with the Tourism Manager at MIT with a view to augmentation through a coordinated, staged and integrated (with other MIT staff) effort across stakeholders, cruise lines, onshore experience providers, local industry, etc.	2024	MIT owner +funders	Depends on part or full time and length - approximately $30,000-$50,000	Successfully obtain funding and appoint a suitably qualified contractor or consultant to lead Mackay's cruise readiness efforts.	**CGC**

APPENDICES (CONTINUED)

Strategic Pillars (to deliver Goals)	Actions (summary only as detail in Strategy)	Timeframe	Action Owner + collaborators	Resources Needed (beyond assumed current operational resources)	Measurement of Success and Targets	PRIORITY
Pillar 4: Engagement and Collaboration	4.1. Create an industry engagement plan on the cruise market: • Firstly an intensive 6 month (July to December 2024); then • Less intensive January - June 2025. Include shore excursion providers as speakers, industry speakers, key stakeholders NQBP, bus transport, MRC, etc.	July - December 2024 ongoing	MIT owner +MRC, industry	Nil	Development and agreement (from key stakeholders) on a final industry engagement plan.	**M**
	4.2. Leverage relationships established by TEQ, work closely with cruise lines to understand their needs and expectations. Tailor facilities and services to meet these demands.	July - December 2024 ongoing	MIT+NQBP owners +TEQ	Nil	Inclusion in TEQ cruise related collateral, and featured at cruise specific trade events attended by TEQ.	**S**
	4.3. Develop and maintain robust communication channels with all partners to ensure efficient information sharing and collaboration, fully operational by mid-2025.	2025 - 2028	MIT owner +TEQ, NQBP	Nil	Development and agreement (from key stakeholders) on a final stakeholder engagement plan.	**M**
	4.4. Create customised partnership programs that address the specific needs and expectations of cruise lines and other industry players, aiming to facilitate smooth operations and enhanced visitor experiences.	2025	MIT owner +TEQ, NQBP, transport providers	Nil	Development, launch and promotion of tailored partnership programs with key cruise line companies.	**S**

Strategic Pillars (to deliver Goals)	Actions (summary only as detail in Strategy)	Timeframe	Action Owner + collaborators	Resources Needed (beyond assumed current operational resources)	Measurement of Success and Targets	PRIORITY
Pillar 5: Ongoing Promotion and Positioning	5.1. Revise the current agreed MIT:MRC annual funding plan to include cruise sector engagement and marketing. Plan to be reviewed and revised appropriately each year.	2024 - 2025	MIT owner +MRC	MIT could ask for an additional allocation of funds	Revised funding agreement between MIT and MRC.	**M**
	5.2. Review the DTP to include specific Cruise Ship Strategy goals.	2026 - 2028	MIT owner, Local industry	Assumed included in future DTP budget line	Reviewed and amended DTP.	**S**
	5.3. Work with cruise lines and bus companies to develop collaborative packages and itineraries that showcase the best of the destination. This could include pre and post-cruise extensions, shore excursion packages, and themed tours that highlight the destination's unique attractions and experiences.	2024 - 2028	MIT owner + tourism industry, transport providers	Nil	Development and promotion of cruise specific packages and itineraries that will be featured as a part of the cruise excursion program, and featured in cruise specific promotional materials.	**S**
	5.4. Collaborate with NQBP, MRC and TEQ to develop joint marketing campaigns that promote the destination as a cruise destination to cruise lines and inbound tour operators.	2024 - 2028	MIT owner +NQBP, MRC, TEQ	Nil	Obtain funding to develop and launch a cruise specific marketing campaign.	**S**
	5.5. Attend industry events such as cruise trade shows, conferences, and networking events to showcase the destination and to build relationships, exchange information, and discuss potential collaboration opportunities.	2024 - 2028	MIT owner +TEQ, MRC, NQBP	Assumed built into current budget line	Actively participate in at least three major industry events per year from 2024 to 2027 to enhance visibility, build relationships, and promote Mackay's cruise tourism offerings.	**S**

Continued on following page/s.

APPENDICES (CONTINUED)

Strategic Pillars (to deliver Goals)	Actions (summary only as detail in Strategy)	Timeframe	Action Owner + collaborators	Resources Needed (beyond assumed current operational resources)	Measurement of Success and Targets	PRIORITY
Pillar 5: Ongoing Promotion and Positioning (continued)	5.6. Organise familiarisation tours and site visits for representatives from cruise lines and inbound tour operators to experience the destination firsthand as a compelling cruise destination.	2024 - 2028	MIT owner +TEQ, Tourism industry, NQBP	Assumed built into current budget line	Facilitate a minimum of 10 meetings with key cruise line and shore excursion organisations.	**S**

APPENDICES (CONTINUED)

Strategic Pillars (to deliver Goals)	Actions (summary only as detail in Strategy)	Timeframe	Action Owner + collaborators	Resources Needed (beyond assumed current operational resources)	Measurement of Success and Targets	PRIORITY
Pillar 6: Ongoing Promotion and Positioning	6.1. Prioritise strategy and actions from the Mackay Cruise Ship Strategy. Clearly delineate an internal lead role inside MIT and describe where this overlaps with any contracted term-defined staff with those of other staff, emphasising that all will have a role.	July 2024 - ongoing	MIT owner +MRC, NQBP, TEQ, Local Industry	Nil	Establish clear rules of engagement and protocols between existing MIT staff, the appointed cruise industry contact, and other contractors engaged to deliver elements of the strategy.	**CGC**
	6.2. Consider the evolution of the Mackay Cruise Ship Strategy Steering Committee to an informal and more inclusive Mackay Cruise Ship Forum (to be named) with the considerations or elements included as ideas in Appendix 3 that could form a Terms of Reference to guide your decision Ratify a Terms of Reference for the new governance forum serving as a clear guideline for operations, decision-making, and strategy evolution.	July 2024 - ongoing	MIT owner +MRC, NQBP, industry representatives from transport and tourism	Nil	Development of a Terms of Reference to guide the evolution of the Mackay Cruise Ship Strategy governance forum.	**M**
	6.3. Initiate an annual review process of the Mackay Cruise Ship Strategy starting in 2025 to adapt to changing industry conditions and stakeholder feedback, ensuring the strategy remains resourced, relevant and effective.	2025	MIT owner +governance forum	Nil	Establishment of the review parameters/ process. Undertake the first review in 2025.	**S**

11.2 Appendix Two - Experiences and Attractions Audit

- Land Based Tours
- Marine Based Tours
- Scenic Flights
- Hire/Self Guided Experiences
- Transport
- Museums and Cultural Attractions
- Natural Attractions
- Attractions
- Food/Beverage Experiences
- Art Experiences
- Parks and Gardens

NAME	CATEGORY	FREE/PAID	LOCATION
ValleyView Minis	Attractions	Paid	Finch Hatton
Artspace Mackay	Art Experiences	Free	Mackay
Blue Water Trail	Parks and Gardens	Free	Mackay
Sarina Tourist Art & Craft Centre	Art Experiences	Free	Sarina
Yakapari Country Crafts & Community Centre	Art Experiences	Free	The Leap
Action Charters	Marine Based Tours	Paid	Mackay
Elizabeth E II Cruises	Marine Based Tours	Paid	Mackay
Fishin' Magician	Marine Based Tours	Paid	Mackay
Inshore Fishing	Marine Based Tours	Paid	Mackay
Mackay Fly & Sportfishing	Marine Based Tours	Paid	Mackay
Northern Conquest Charters	Marine Based Tours	Paid	Mackay
Reefari Pty Ltd	Marine Based Tours	Paid	Mackay
Ballantyne's Strawberry Farm	Food/Beverage Experiences	Paid	Mount Charlton
Goanna Brewing	Food/Beverage Experiences	Paid	Mackay
Mackay Fish Market	Food/Beverage Experiences	Free	Mackay
Vintage Farmhouse Kitchen	Food/Beverage Experiences	Paid	Mackay
J.M.Mulherin Memorial Park	Museums and Cultural Attractions	Free	Mackay
Mackay Community Garden	Parks and Gardens	Free	Mackay
Mackay Orchid House	Parks and Gardens	Free	Mackay
Mackay Regional Botanic Gardens	Parks and Gardens	Free	Mackay
Queens Park	Parks and Gardens	Free	Mackay
Adrenalin Paintball Mackay	Attractions	Paid	Mackay
Bluff Hill National Park	Natural Attractions	Free	Mount Charlton
Boulder Creek	Natural Attractions	Free	Mount Charlton
Broken River Platypus Viewing	Natural Attractions	Free	Eungella
Cape Hillsborough National Park	Natural Attractions	Free	Cape Hillsborough

APPENDICES (CONTINUED)

NAME	CATEGORY	FREE/PAID	LOCATION
Eungella National Park	Natural Attractions	Free	Eungella
Finch Hatton Gorge	Natural Attractions	Free	Finch Hatton
Newry Islands National Park	Natural Attractions	Free	Seaforth
Pioneer River	Natural Attractions	Free	Mackay
Slade Point	Natural Attractions	Free	Slade Point
Smith Islands National Park	Natural Attractions	Free	Smith Islands National Park
The Pioneer Valley	Natural Attractions	Free	Eungella
Yuwi Paree Toolkoon National Park	Natural Attractions	Free	Mackay
Art Deco Walk	Art Experiences	Free	Mackay
Bluewater Sculpture Trail	Art Experiences	Free	Mackay
Finch Hatton War Memorial	Museums and Cultural Attractions	Free	Finch Hatton
Greenmount Homestead	Museums and Cultural Attractions	Paid	Mackay
Jubilee Park	Parks and Gardens	Free	Mackay
Koumala War Memorial	Museums and Cultural Attractions	Free	Koumala
Mackay General Cemetery	Museums and Cultural Attractions	Free	Mackay
Mackay Historical Society and Museum Inc.	Museums and Cultural Attractions	Free	Mackay

NAME	CATEGORY	FREE/PAID	LOCATION
Mackay Tiger Moth Museum Inc	Museums and Cultural Attractions	Paid	Mackay
Mackay Tiger Moth Scenic Flights	Scenic Flights	Paid	Mackay
Mackay Town Hall	Attractions	Free	Mackay
Melba House	Museums and Cultural Attractions	Free	Mackay
Vintage Kiss Cafe (operates from Melba House)	Museums and Cultural Attractions	Paid	Mackay
Pioneer Valley Museum	Museums and Cultural Attractions	Free	Marian
Sarina Big Cane Toad	Attractions	Free	Sarina
Sarina District Historical Centre	Museums and Cultural Attractions	Free	Sarina
Sarina Sugar Shed	Attractions	Paid	Sarina
Sarina War Memorial	Museums and Cultural Attractions	Free	Sarina
The Leichhardt Tree	Museums and Cultural Attractions	Free	Mackay
World War I Cenotaph, Mackay	Museums and Cultural Attractions	Free	Mackay
Adrenalin Laser Skirmish	Attractions	Paid	Mackay
Bluewater Lagoon	Attractions	Free	Mackay
Forest Flying	Land Based Tours	Paid	Finch Hatton
Kommo Toera Trail	Natural Attractions	Free	Mackay

APPENDICES (CONTINUED)

NAME	CATEGORY	FREE/PAID	LOCATION
Mackay Aquatic & Recreation Complex	Attractions	Paid	Mackay
Memorial Swim Centre	Attractions	Paid	Mackay
Pioneer Swim Centre	Attractions	Paid	Mackay
Rainforest Scuba Diving	Marine Based Tours	Paid	Finch Hatton
Sandfly Creek Walkway	Natural Attractions	Free	Mackay
Seaforth Pines Outdoor Education and Conference Centre	Attractions	Paid	Seaforth
Teemburra Dam Fishing	Attractions	Paid	Finch Hatton
The Singapore Shipwreck Dive Site	Natural Attractions	Free	Keswick Island
Wake House Australia	Attractions	Paid	Mackay
Rainforest Scuba Land Tours	Land Based Tours	Paid	Finch Hatton
Reeforest Adventure Tours - Mackay	Land Based Tours	Paid	Mackay
Sunrise with the Wallabies Experience	Natural Attractions	Free	Cape Hillsborough
Wildcat Mackay	Marine Based Tours	Paid	Mackay
Bucasia Beach	Natural Attractions	Free	Mackay
Gooseponds	Parks and Gardens	Free	Mackay
Lamberts Lookout	Natural Attractions	Free	Slade Point

NAME	CATEGORY	FREE/PAID	LOCATION
Mackay Entertainment and Convention Centre (MECC)	Attractions	Paid	Mackay
Harbour Beach	Natural Attractions	Free	Mackay
Dolphin Heads	Natural Attractions	Free	Mackay
Dudley Denny City Library	Attractions	Free	Mackay
Lamberts Beach	Natural Attractions	Free	Slade Point
Town Beach	Natural Attractions	Free	Mackay
Mango Avenue	Attractions	Free	Mackay
Far Beach	Natural Attractions	Free	Mackay
Mackay Museum	Museums and Cultural Attractions	Paid	Mackay
Illawong Beach	Natural Attractions	Free	Mackay
Armstrong Beach	Natural Attractions	Free	Mackay
St Helens Beach	Natural Attractions	Free	Mackay
Mackay Adventure Tours and Transfers	Land Based Tours	Paid	Mackay
Historic War Tours	Land Based Tours	Paid	Mackay
Island Air Mackay	Scenic Flights	Paid	Mackay
The Paddling Yogi	Marine Based Tours	Paid	Mackay
Mingle Minis Mystery Food and Shopping Tours	Land Based Tours	Paid	Mackay
Escape Rooms Mackay	Land Based Tours	Paid	Mackay

APPENDICES (CONTINUED)

NAME	CATEGORY	FREE/PAID	LOCATION
Escape Rooms Mackay	Land Based Tours	Paid	Mackay
Keswick Island	Natural Attractions	Free	Keswick Island
Oh Deere Farmstay	Land Based Tours	Paid	Calen
The Flackyard	Food/Beverage Experiences	Paid	Finch Hatton
One Hungry Mumma	Food/Beverage Experiences	Paid	Finch Hatton
Red Dog Brewery	Food/Beverage Experiences	Paid	Mackay
Mackay Whitsundays Taxi	Transport	Paid	Mackay
Mackay Whitsunday Buses	Transport	Paid	Mackay
Mackay Riverside Market	Food/Beverage Experiences	Free	Mackay
Bush Lemon Farm	Food/Beverage Experiences	Paid	Dow's Creek
Mackay Farmers Market	Food/Beverage Experiences	Free	Mackay
Deep Gully Farm	Food/Beverage Experiences	Paid	Kuttabul
Mount Jukes Family Farm	Food/Beverage Experiences	Paid	Mount Jukes
Bredl's Wild Farm	Attractions	Paid	Bloomsbury
Kitten Vintage	Art Experiences	Free	Mackay
Platypus Paddle	Land Based Tours	Paid	Eungella

NAME	CATEGORY	FREE/PAID	LOCATION
Pine Islet Lighthouse	Attractions	Paid	Mackay
Bottle Tops and Brushes	Art Experiences	Paid	Mackay
Cedar Gallery	Art Experiences	Paid	Eungella
Mackay Leisure Centre	Attractions	Paid	Mackay
Finch Hatton Mountain Bike Trails	Attractions	Free	Finch Hatton
Notepark Grazing Company	Attractions	Paid	Homebush
Dittmann Bucking Bulls	Attractions	Paid	Bloomsbury
Off Camber Mountain Biking	Transport	Paid	Finch Hatton
Corry Cycles	Hire/Self Guided Experiences	Paid	Finch Hatton
Sky Window Walk	Natural Attractions	Free	Eungella

11.3 Appendix Three - Ideas to Create a Terms of Reference for a Mackay Cruise Ship Forum

PURPOSE (OR TERMS OF REFERENCE)

- Monitor progress against the Mackay Cruise Ship Strategy Implementation Plan;
- Provide advice, market intelligence, insights and have input into critical projects and strategies as a vital part of MIT's industry engagement framework;
- Establish an industry wide collegial and collaborative approach with participants taking a whole of region perspective; and
- The forum has no oversight of MIT's operational arm nor is it based on advocacy for any sector, entity, association or industry group.

SUGGESTED PROCESS

- Each Cruise Ship Forum will seek to advance the Implementation Action Plan and subsequent described actions by focusing mostly on a meaningful set of items (no more than 2-3 for each meeting);
- MIT does not report to but does provide briefings to the forum (only as part of the next point);
- Any participant may be asked, or may request, to provide a briefing based on the items for discussion at the next agenda;
- Briefing papers will be in a set template, limited to one A4 page and are tabled to inspire thought, insight and 'workshopping' of challenges or ideas for the priority action items in the Implementation Action Plan;
- No formal decisions are made, however, direction and recommendations for action will be formulated for MIT;
- Each forum agenda is sent out 5 days before the forum;
- The forum will retain notes of meetings with a general summary circulated 5 days after each;
- The 'forum' will meet each 4 weeks in year one, then determine the best timings; and
- Each forum is for 1 ½ hours maximum.

PARTICIPATION

- Participation for external participants is by direct invitation from MIT or an Expression of Interest process; and
- MIT highly values those taking part in the Cruise Ship Forum and retains its right to commence or terminate participation based on the best interests of the forum and respect for the time and effort volunteered by other or new participants.

11.4 Appendix Four - Template to Design a Cruise Visitation Procedures Manual

PRIMARY TASK

The topics below are a template to develop a comprehensive MIT internal (only) ***Cruise Visitation Procedures Manual.*** This will allow MIT to ensure the destination's excellence in hosting cruise ship visits and provide a seamless and memorable experience for cruise ship passengers, crew members, and stakeholders.

SECTIONS TO CONSIDER

Introduction and Overview

An introduction to the purpose and scope of the manual, along with an overview of the destination's cruise ship program.

Cruise Ship Operations

A description of how cruise ship visits are managed, including port operations, berthing procedures, and ship handling.

Port Facilities and Services

Information about the port facilities available to cruise ships, including terminal facilities, docking arrangements, gangway access, and passenger amenities.

MIT Staffing Role Clarity

Define the role of each relevant staff member in the hosting of cruise ship visits. This should be detailed and cite actions, tasks and communication protocols with the Cruise Ship lead.

Safety and Security Protocols

Procedures for ensuring the safety and security of cruise ship passengers, crew members, and the local community, including emergency response plans, security measures, and risk management protocols. This will also be included in the wider destination procedure manual with other key stakeholders.

Passenger Services

Guidelines for providing high-quality passenger services, including passenger welcome procedures and the use of cruise Ambassadors. This needs to be a comprehensive section on how they are recruited, trained, managed and the cross organisational aspects with Mackay Regional Council and/or service clubs.

Shore Excursions Management

Process for developing, supporting and stimulating shore excursions and rules and protocols for dealing with shore experience companies and their representatives.

Cultural and Environmental Preservation

Guidelines for promoting cultural sensitivity and environmental stewardship during cruise ship visits, including protocols for visiting sensitive cultural sites, protecting natural habitats, and minimising environmental impact.

Community Engagement

Strategies for engaging with the local community and fostering positive interactions between cruise ship visitors and residents, including volunteer programs, cultural exchange initiatives, and community outreach efforts.

Stakeholder Collaboration - Engagement Plan

Procedures for collaborating with key stakeholders involved in the cruise ship

program, including cruise lines, port authorities, tour operators, transportation providers, and local businesses. This will incorporate targets set out in Strategy.

Quality Assurance and Feedback

MIT should monitor and evaluate the quality of hosting cruise ship visits, including passenger feedback mechanisms, performance metrics, and continuous improvement initiatives, as set out in the Strategy.

Training and Capacity Building

The Strategy scopes possible 'academy' activities which occur over time and will be dependent on grant funding being sourced. This may include training programs, business case development and capacity-building initiatives for staff and stakeholders involved in servicing cruise ship visitors, including hospitality training, cultural awareness programs, and safety drills.

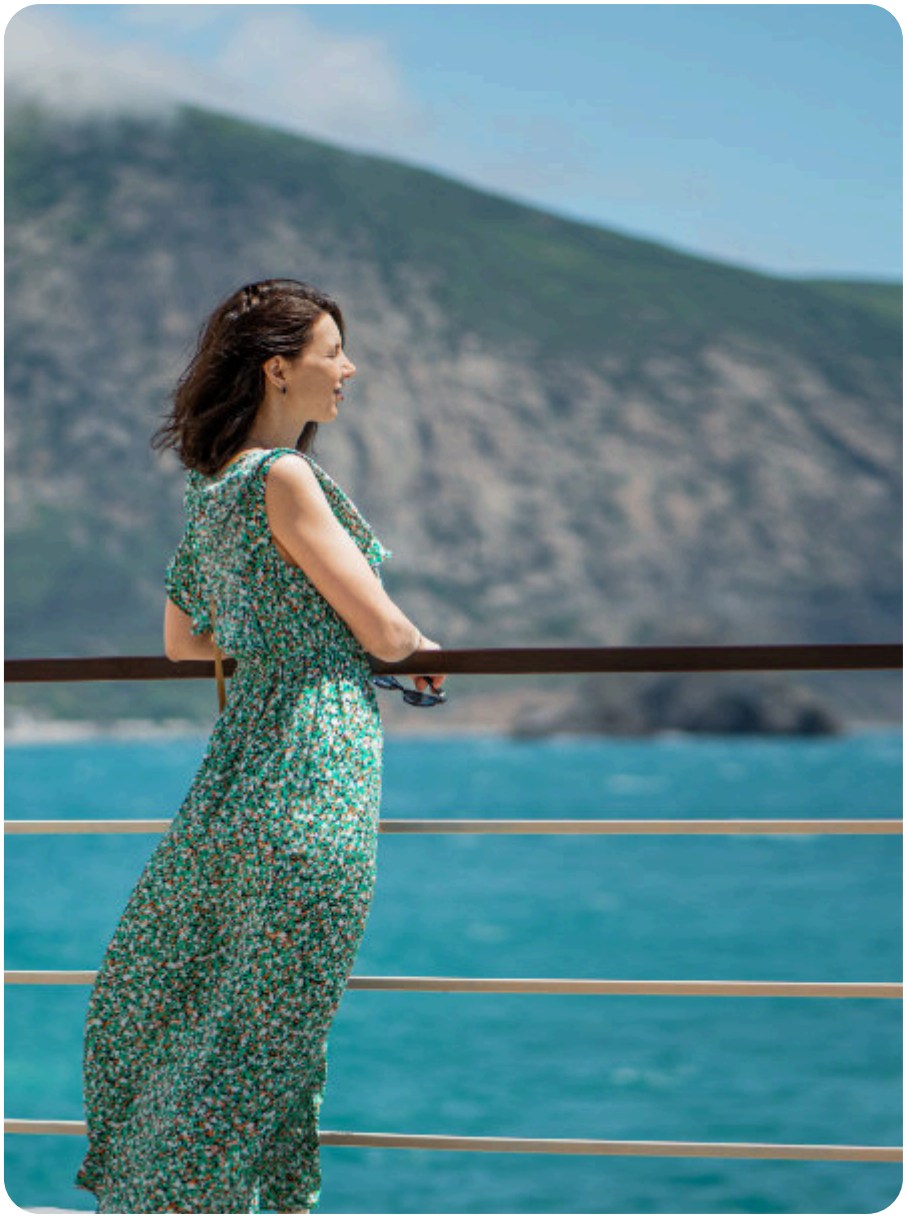
Regulatory Compliance

Ensure that MIT (and in the overall destination procedures manual, all stakeholders) comply with relevant regulations, standards, and industry best practices governing cruise ship operations, including port regulations, maritime laws, and international conventions.

Crisis Management and Contingency Planning

Protocols for managing crises and unforeseen events during cruise ship visits, including communication strategies, emergency response procedures, and crisis management protocols. This should also align with the overall destination procedures manual and be synchronised with other critical players: MRC and NQBP.

It will include a full and easily accessed contact list.



12 GLOSSARY

GLOSSARY (CONTINUED)

ITEM	EXPLANATION
BEDA	Brisbane Economic Development Agency, drives the sustainable economic growth of the city.
Brand Positioning	The strategy of placing a brand in a distinct position in the minds of consumers relative to competitors, highlighting unique features and benefits.
Commissionable Product	Tourism products or services, such as tours or activities, for which travel agents or other third parties receive a commission for selling.
Customer Experience (CX)	The overall perception customers have of their interactions with a company or brand, encompassing all stages from pre-booking to post-cruise feedback.
Cruise Itinerary	A detailed schedule of a cruise, including the sequence of ports visited, duration of stays, and activities offered.
Cruise Ready Volunteers	Individuals trained to assist and welcome cruise passengers at ports of call, providing information and support to enhance the visitor experience.
Cruise Sector	The segment of the tourism industry focused on providing cruise vacations, including cruise lines, travel agents, and associated service providers.
Destination Infrastructure	The physical and organisational structures needed for the operation of a destination, including transportation, accommodation, and facilities to support tourism.
Destination Management	The coordinated management of all elements that make up a destination, including attractions, amenities, access, marketing, and pricing.

ITEM	EXPLANATION
Destination Tourism Plan	A strategic document outlining the development and marketing of a destination to attract and manage tourists, ensuring sustainable growth and positive visitor experiences.
Digital Marketing	The use of digital channels, including social media, email, and websites, to promote cruise services and engage with potential and existing customers.
Domestic Trade Ready Tourism Experiences	Tourism products and experiences designed to meet the standards and expectations of domestic travel trade, ensuring they are marketable and ready for promotion.
Experience Development	The process of creating and enhancing tourism experiences to meet visitor needs and expectations, often focusing on unique, memorable, and high-quality offerings.
Holiday Visitation	The act of traveling to a destination for leisure purposes, typically involving overnight stays and participation in recreational activities.
Key Performance Indicators (KPIs)	Metrics used to evaluate the success of various aspects of a cruise strategy, such as passenger satisfaction, occupancy rates, and revenue per passenger.
Maritime Pilot	A mariner who has specific knowledge of an often dangerous or congested waterway, such as harbours or river mouths. Maritime pilots know local details such as depth, currents, and hazards.
Market Segmentation	Dividing a broad consumer or visitor market into sub-groups of consumers based on shared characteristics to target them more effectively.

GLOSSARY (CONTINUED)

ITEM	EXPLANATION
Market Share	The percentage of sales or customers a company or destination holds within the total market, indicating its competitiveness and success.
MIT	Mackay Isaac Tourism Regional Tourism Organisation
MRC	Mackay Regional Council
NQBP	North Queensland Bulk Ports
On-board Revenue	Income generated from activities and services provided on the cruise ship, such as dining, entertainment, and retail sales.
OVE	Overnight Visitor Expenditure - a key measure of tourism outcomes
Passenger Capacity	The maximum number of passengers that a cruise ship can accommodate, influencing the scale of services and facilities provided on board.
Passenger Demographics	Statistical data relating to the characteristics of cruise passengers, including age, gender, income, and travel preferences.
Port of Call	A destination where a cruise ship stops during its voyage, allowing passengers to disembark and explore.
Product Development	The process of creating and improving products or services to meet customer needs and market demands. In tourism, this includes new tour packages, excursions, and on-board experiences.
QTIC	Queensland Tourism Industry Council

ITEM	EXPLANATION
Regional Dispersal	The distribution of tourists across various regions within a destination, aiming to spread the economic benefits of tourism and reduce pressure on popular areas.
Shore Excursions (Shorex)	Organised trips and activities available to cruise passengers at various ports of call, enhancing the overall travel experience.
Sustainable Tourism	Tourism that takes full account of its current and future economic, social, and environmental impacts, addressing the needs of visitors, the industry, the environment, and host communities.
Target Market	A specific group of consumers identified as the recipients of a marketing campaign or product offering, based on demographics, interests, and behaviors.
TEQ	Tourism and Events Queensland
Tourism Ambassadors	Local volunteers or employees who promote a destination and assist visitors by providing information, guidance, and a friendly welcome.
Tourism Audit	A comprehensive assessment of a destination's tourism assets, services, and infrastructure to identify strengths, weaknesses, and opportunities for improvement.
Trade Shows	Events where tourism industry professionals gather to network, showcase products, and negotiate deals, helping to promote destinations and tourism services.
VFR	Visiting Friends and Relatives, a cohort of visitors to a destination who spend less.

Mackay Isaac Tourism thanks and acknowledges our partners for this initiative.

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North Queensland Bulk Ports Corporation

Regional Development Australia
Greater Whitsundays

Tourism & Events Queensland

Tourism Solutions Group