MACKAY
ISAAC
TOURISM

DESTINATION TOURISM PLAN
2022—2027

The **Mackay Region**
Queensland Nature. Reserved.

ACKNOWLEDGEMENT OF COUNTRY

The Board and staff of Mackay Isaac Tourism as well as the authors of this report would like to Acknowledge and pay respects to the Traditional Owners of these lands, past, present and the young leaders who are Elders of the future. In acknowledging the Aboriginal communities' deep and enduring connection to Country and waters, it is also recognised that these communities are integral to the future of the unique landscapes and experiences that make up the region.

LARRAKIA PRINCIPLES

The Mackay Isaac Destination Tourism Plan recognises the six *Larrakia Declaration Principles* and focuses on leveraging a flourishing First Nations tourism economy by sharing authentic, memorable, and culturally enriching experiences.

1 Respect for customary law and lore, land and water, traditional knowledge, traditional cultural expressions, cultural heritage that will underpin all tourism decisions.

2 Indigenous culture and the land and waters on which it is based, will be protected, and promoted through well-managed tourism practices and appropriate interpretation.

3 Indigenous peoples will determine the extent and nature and organisational arrangements for their participation in tourism and that governments and multilateral agencies will support the empowerment of Indigenous people.

4 That governments have a duty to consult and accommodate Indigenous peoples before undertaking decisions on public policy and programs designed to foster the development of Indigenous tourism.

5 The tourism industry will respect Indigenous intellectual property rights, cultures and traditional practices, the need for sustainable and equitable business partnerships and the proper care of the environment and communities that support them.

6 That equitable partnerships between the tourism industry and Indigenous people will include the sharing of cultural awareness and skills development which support the well-being of communities and enable enhancement of individual livelihoods.

Contents

Introduction

Located on Australia's east coast, in central Queensland, the Mackay Isaac Region offers islands, reefs, rainforest, heritage towns and city scape. The Mackay Isaac Region is naturally diverse, offering visitors a laid back, Queensland experience filled with natural encounters. Mackay Isaac Region is home to Australia's longest stretch of subtropical rainforest, 12 national parks and diversity of hinterland, heritage towns and coastal areas.

Tourism plays an important role in the Mackay and Isaac social and economic structure employing over 3,540[1] people (6.2% of jobs in the region) and servicing 4.8 million visitors in the year prior to COVID-19 impacts. This plan builds on the 2020 Tourism Opportunities Analysis and its actions to strengthen tourism product across the region.

This plan will guide action, advocacy, and the future of tourism investment over the next five years.

As we look to a volatile, uncertain, complex, and ambiguous future across the tourism industry, the Mackay Isaac Region has a lot to capitalise on. With a domestic audience on its doorstep, the region has a unique ability to capture a distinct local market and partner with neighbouring regions to deliver strong outcomes over the next 12-months and beyond. To weather future storms, a shift in business focus within Mackay Isaac Tourism to facilitate investment in new products and focus on business resilience, adaptability and authentic experience delivery will support competitiveness. This Destination Tourism Plan will take a sustainable development approach, considering the impact of tourism on visitors, industry, community and the environment.

The vision for the region is "to be a must visit destination by showcasing memorable, authentic and unique nature based and heritage experiences and events to the world."

To deliver on this vision, the region will collaborate and work together to deliver on the following pillars:
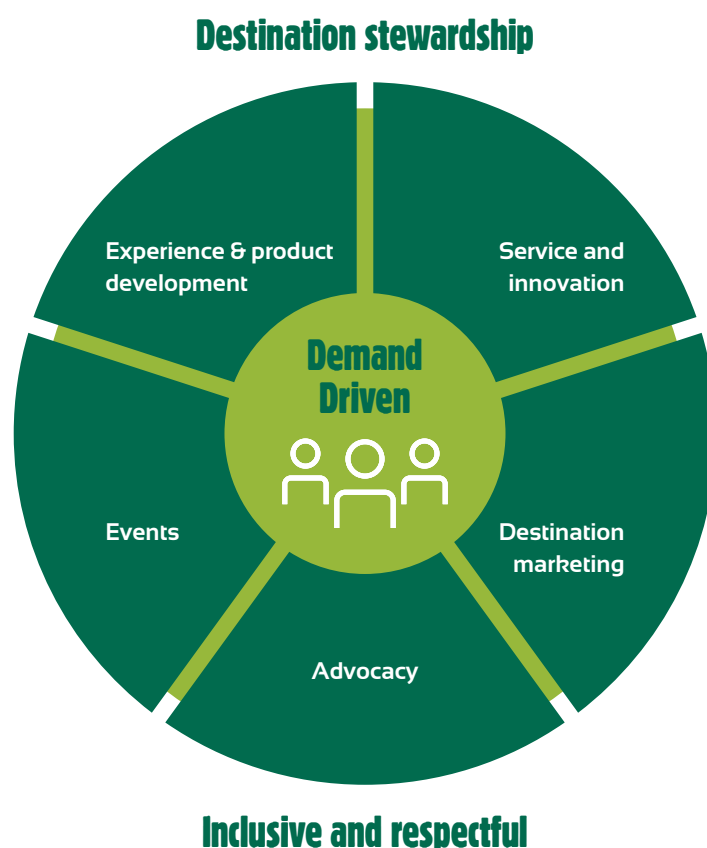
[1]Tourism - an amalgam of activities across various industry sectors such as retail, accommodation, cafes & restaurants, cultural & recreational services. The tourism industry sector services the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited. Source: Australian Bureau of Statistics National Accounts Tourism Satellite Account.

Current context

A comprehensive visitor analysis is conducted within the *Tourism Opportunities Analysis*. Key trends are outlined below.

Visitor Trends

Tourism in Mackay Isaac Region recorded an average annual growth (AAG) of 6.2% between 2015 and 2019. Overnight domestic visitors account for 54.9% of travel to the region with domestic day trips accounting for 42.2% and international visitors 2.9%.

Visitor nights grew in-line with visitor numbers (AAG of 6.2%) increasing from 3.5 million in 2015 to almost 4.8 million in 2019.

In 2019, visitors spent approximately $641.M while visiting Mackay Isaac Region. Domestic overnight expenditure accounted for $151.M (80.6% of total expenditure and 96.2% of total overnight expenditure). Domestic daytrip expenditure accounted for $126.0M (16.2% of total expenditure) while inbound expenditure generated $16.0M (3.2% of total expenditure and 3.8% of total overnight expenditure).

Of the total expenditure, it is important to note that among domestic overnight travellers, business is by far the strongest market, with expenditure in excess of $270m, compared to $90m in holiday expenditure and $87m from VFR (visiting friends and relatives). This significant business market demonstrates strong opportunity for market activation, with VFR an important market.

In 2019, average expenditure per visitor was the highest among domestic daytrip visitors ($140 per visitor), while domestic overnight visitors spent $130 per night and inbound visitors spent $63 per night.

20% of domestic overnight travellers are holiday travellers (34% of total travel).

54% of domestic overnight travellers are business travellers (38% of total travel).

Visitor spend **increased** to $641 million.

Visitor nights **increased** to $4.8 million.

The strongest international markets are New Zealand (VFR), Germany (holiday) and UK.

35% of visitors stay 4-7 nights.

Visitor Profile

When examining the profile of visitors to the region, the prevalence of males and business travellers is important. This is distinct from other regions providing significant opportunity and is reflective of the mining community.

There is also a wealthier than average market visiting the region, a substantial proportion of the market (47%) has a household income over $150,000. This indicates a propensity to spend among the market.

Converting business visitors (especially those within the resource sector) into leisure travellers, engaging with VFR, or by encouraging the inclusion of (family) holiday opportunities before or after a business trip (Bleisure), creates opportunity to extend length of stay and encourage greater spend in region. The business (resource) market within the Mackay Isaac Region is a captive market with disposable income and time. The opportunity to further leverage this market is significant.

It is also important to note the high-level of self-drive visitors (86%). This has implications for infrastructure (roads, rest-stops, car-parking, lighting), wayfinding (directional and tourist signage) and influences the airport accessibility and connection to city and broader region. Exploring opportunities to engage with this market is important, as is the development of core experiences that create a compelling reason to stop.

More than half of visitors were male (66.8%).

Nearly half of visitors (43.6%) were business travellers, followed by 29.3% of holiday makers.

45.9% of visitors were solo travellers, followed by adult couples (18.7%) and business colleagues travelling together (18.4%).

95.1% of visitors were from Queensland with 83.7% from regional Queensland, and 1.3% from Brisbane.

42.2% of visitors were aged 50 and over, followed by 27.5% of visitors aged 35-49 and 24.9% of visitors aged 20-34.

46.7% of visitors had annual household income more than $150k followed by 23.9% having annual household income between $85k-$150k and 20.7% having annual household income between $40k-$85k.

Commercial accommodation (38.3%) was the most popular accommodation option of domestic overnight visitors, followed by other accommodation (34.3%).

Self-drive (86.4%) was the most popular transport option for domestic visitors to Mackay.

Economic Impact

The tourism industry in Mackay Local Government Area (LGA) supports an estimated 2,960 jobs (6.2% of total employment this compares to 7.6% of employment in Queensland). The industry is predominantly comprised of accommodation and food services, which employs 1,683 people and facilitates the majority of tourism expenditure. Tourism is the 7th largest employment industry in Mackay LGA behind health care and social assistance, retail and construction. Tourism employs a larger number of workers than the mining industry (2,960 and 2,623 respectively), however pays significantly lower wages and salaries ($319.299m and $122.376m). At an estimated $185.769m, accommodation and food services is one of the lowest value-added contributors to Mackay's economy.[2]

In the Isaac LGA, tourism supports an estimated 937 jobs – 4.4% of total employment. Of these jobs, 776 are within the accommodation and food services. Tourism is the third largest employer in the Isaac Region behind mining and agriculture, forestry, and fishing (13,080 and 1,159 respectively). As with Mackay, the tourism sector within the Isaac Region pays significantly lower wages and salaries ($41.150m) when compared to other industries. At an estimated $78,790, accommodation and food services is the 7th highest value adding contributor to the Isaac economy.

When it comes to community satisfaction with tourism across the Mackay and Isaac LGAs, 66% of residents are highly satisfied with tourists (above Queensland average of 42%). Community is content with the continued growth of tourism, 69% are willing to attract more visitors. Tourism is considered to positively impact the community according to 47% of respondents (above the Queensland average of 41%), however this is a slight decrease from 2019 (54%). Tourism brings a positive impact personally to 22% of participants (Queensland average 15%). Mackay and Isaac residents overwhelmingly agree that because of tourism, there is greater cultural diversity (92%), economic benefits (95%), festivals and events attract tourists and raise awareness (91%), increased regional profile (88%) and increased local pride (77%).[3]

[2]RemPlan - ABS 2016 Census Place of Work Employment (Scaled), ABS 2018 / 2019 National Input Output Tables, ABS June 2021 Gross State Product, and ABS 2020 / 2021 Tourism Satellite Account.

[3]Tourism and Events Queensland. Community Sentiment. 2020.

Key Markets

Built off desktop analysis and discussions with key stakeholders, target markets include:

4-hour drive market

This market lives and/or works within a four-hour radius of Mackay/Isaac. Visitors are travelling purely for a leisure purpose and will use their own vehicle to reach the destination – they may be towing a camper trailer or caravan. This group of visitors are highly mobile and can access all parts of the region, they like to explore, travel beyond the 'known' tourism destinations and spend money with local businesses.

Visiting friends and relatives

A unique and challenging market, these visitors come to region to spend time with loved ones. It is likely that they will combine their travel with events, holidays, or business. VFR visitors will often rely on their hosts (family or friends) to guide them on what activities to do – thus to reach this market it is important for residents to understand all there is to do in region. These visitors are less likely than others to pay for accommodation and spend time in traditional attractions.

Bleisure

Business travel combined with leisure travel (bleisure) is growing in popularity as COVID-19 impacts see the work-life boundaries blur. Whether working from anywhere, tagging on several days before or after a work trip or taking family with you, bleisure visitors are opportunistic. Decision making is based on the attraction of the destination they are being sent to. Bleisure visitors are typically culturally curious and interested in work. Mackay Isaac benefits from many fly-in-fly-out workers. Emphasising the lifestyle appeal of the region and converting these from flying out to staying in – or bringing family - presents significant opportunity for the region.

Couples: soft adventure, sports, and touring

Seeking enjoyment from the outdoors and a gentle thrill, adventure seeking couples are looking for ways to reconnect with one-another and nature in a fun and connected way. Transformational experiences are important for this market. They are searching for experiences that inspire, enrich, and empower their lives. Opportunities to connect with the local community and give back to the destination are also important.
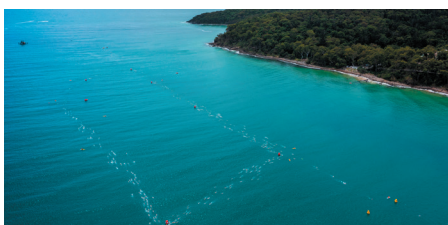
Events

Whilst events typically build from the core markets identified, events also provide the opportunity for engagement with broader markets and present lifestyle reasons to stay in region. Events present a reason to stay longer in region or to visit in non-peak periods. Events visitors present a significant opportunity for the Mackay Isaac Region.

Targeted Growth Market

International markets were, prior to the impact of COVID-19, showing green shoots of growth and present opportunity for the Mackay Isaac Region into the future. Germany and other European destinations were the fastest growing markets. Whilst New Zealand is a strong international market that has grown from 2010, only 36% are travelling for leisure purposes, compared with 87% of Germany and 67% of UK visitors.

German travellers are most likely to weigh up between multiple destinations before they make their decision. To convert interest into action, German travellers are seeking opportunities to be outdoors and active during their stay. They place a high value on information content and helpful reviews when making their final decision.

SWOT analysis

Underpinned by existing strategies and insight, alongside feedback from key stakeholders, the SWOT analysis highlights the region's current strengths and weaknesses that will need to be addressed through the actions of this DTP. It also presents key opportunities and threats for the region to enhance tourism's contribution to social, economic and environmental outcomes.

Strengths

- High-quality natural environment
- Demand generated through the mining sector
- Quality airport infrastructure and airline services
- Supportive Councils
- Quality marina
- All-year-round attractive climate
- New accommodation
- GBR World Heritage status
- Interesting drive routes

Weaknesses

- No clarity in regional image
- Lack of sufficient leisure and family attractions and activities
- Lack of tour operators
- Low service standards
- Lack of investment pipeline
- Staff shortages
- Impact of the mining boom – staff, accommodation
- Lack of consistently in delivery
- Low repeat visitor numbers
- Lack of public transport

Opportunities

- Create built environment that complements natural environment
- Wealthy business travel market
- Home grown events calendar
- Spread economic benefits of tourism widely throughout region through new attractions & experiences
- Improve ground transport options
- Improve occupancy rates through stronger packaging
- Develop higher-end, boutique lodges
- Strengthen the region's fishing experience
- Develop a higher-quality destination holiday park
- Grow the region's mountain bike tracks and events
- Better interface with Mining Industry – make it accessible to see and learn
- Refurbish older motel properties where possible
- Introduction of agritourism experiences
- Develop higher-end health and wellness product
- Day tours to surrounding islands
- Adventure product leveraging off the region's terrain
- Signature, unique destination food festivals
- Voluntourism opportunities with the region's wildlife (e.g., Dugongs)
- Gold prospecting experiences
- Enhancements to St Lawrence Wetlands

Threats

- Perception as a non-sustainable destination as borders re-open and consumers seek sustainable destinations (travel for good alignment)
- Inability to secure investment for new experiences to date
- Investment almost solely focused in servicing the mining and resource sector
- Perception of the region as not a leisure destination
- Reduction in airline services
- Overpricing of rooms in Mackay and Moranbah
- Loss of caravan parks to unit development
- Overshadowed by the Whitsundays as a leisure destination
- Negative perception outside the region – lack of things to see and do
- Post-COVID-19 impact on the mining and resource sector with reducing demand for commodities
- Climate change – 2022 Global Risks Report, again highlights climate action failure as the greatest risk to global business.
- Shifting nature of the tourism structures in Queensland
- Increasing international competition as borders open
- On-going staff shortages – middle management.

Risk

A bumpy and uneven response to the global pandemic has created cascading impacts on destinations and businesses globally.[4] This includes the complication of response to common challenges such as the urgent need to: strengthen climate action; act in alignment with the sustainable development goals; enhance digital safety; restore livelihood and social cohesion; and manage competition.

As the Mackay Isaac Region continues to invest, attract, and innovate, the integration of a resilience lens is important for the long-term sustainability of the region. A strategic approach to resilience will support coordinated efforts to strengthen resilience among businesses and prevention, preparation, response, and recovery to disaster events.

Core natural risks to the Mackay Isaac Region include cyclones, storm tide and surges, flooding, severe thunderstorms, bushfires, heatwaves, landslide, tsunami, and earthquake. These are all being exacerbated due to the changing climatic conditions. As identified in the Global Risks Report, failure to respond to changing conditions is the greatest long-term threat to businesses. Other threats that need to be considered include cyber security, mental well-being of staff and community, further biological threats from pandemic or endemic situations and tourism related disasters.

Tourism plays a critical role in disaster prevention, preparedness, response, and recovery. As a sector, tourism has essential resources that can be deployed in a time of crisis. This includes generators, grounds maintenance tools, food and beverage supply and emergency accommodation. Tourism operators also support the clear dissemination of information across the community. This is extremely important for non-residents who may be unfamiliar with their surroundings and how to respond and who may not speak the language.

Accessibility and connectedness are also important in the context of a sustainable future. In Australia, 36% of families include a person with disability. This does not include families that include someone with access needs due to age, accident or illness. Being clear in communication with visitors about where they can travel is important, as is providing information in suitable formats for use with adaptive technology. Ensuring that the Mackay Isaac Region is accessible for all will create a long-term competitive advantage for the region and addresses global equity targets.

[4] World Economic Forum. Global Risks Report 2022.

Understanding the impact of Covid-19 & a new normal

COVID-19 has dramatically shifted the way that we travel. International and domestic border restrictions meant that travel patterns were forced to change. But consumption also changed, shifting from a focus on higher order needs to a primary need for safety and security. As we move towards a recovery, we know it will be lumpy. Watching destinations globally, multiple waves of impact are influencing travel, meaning restrictions continue to be enforced and removed.

Response

Safeguarding business and responding to risk and opportunity

Response to the immediate impact of the COVID-19 crisis. Providing confidence to operators and responding to market opportunities and changing market expectations for the next 12 months.

Building & recovery resilience

Embedding resilience in business planning and marketing

Putting in place strategic building blocks to underpin business and marketing plans. Adapt marketing to meet changing consumer and industry needs and expectations. 12–18 months.

Consolidation and adaption

Returning to longer term planning and marketing and succeeding in the 'new normal'

Successfully adapting to new business models, building on key marketing and product development initiatives which are underway. 18 months–3 years.

Considering our response, recovery, and consolidation, we need to take a flexible and responsive approach to changing COVID-19 market threats and opportunities. To achieve this, digital technology linked with face-to-face service outcomes will support a safe and connected response. In the shorter term, we understand domestic visitors are seeking new and exciting things to do, by building on existing hero experiences and supporting product and service infrastructure we can ensure we capture the needs of a local market and position ourselves effectively as restrictions lift to domestic and international markets. As we reopen, quality experience delivery and a customer first service mentality will be required to meet and exceed guest expectations to create compelling reasons to stay.

Deloitte's Global State of the Consumer Tracker (April 20- October 21) demonstrates that there is a strong pent-up demand for travel with a firm increase in those who feel safe travelling over that period. There is however still some travel hesitancy with only 30% of respondents planning a domestic leisure flight in the next three months and 16% intending to travel internationally.

Short term trends that need to be considered over the next 6-12 months include:

Health and safety first

Even when vaccinated, safety is at the forefront of consumer decision making. More research is conducted by visitors into the protocols and safety offered by hotels and experiences.

Outward signs of commitment through COVID-Safe accreditations, availability of hand sanitizer, on-going physical distancing efforts, itineraries that avoid the crowd and cleaning protocols create a sense of security for visitors.

Working from anywhere

With lower overheads, great productivity and employee satisfaction, employers are now supporting more hybrid workplaces and the opportunity to work from anywhere. This has shifted the way that bleisure experiences are consumed including through mid-week consumption.

The great outdoors

Tourism and Events Queensland's Nature Based Strategy highlights the shift-post COVID-19 toward nature-based experience and wild places where visitors can escape the crowds, regenerate, and reconnect with both people and places. To meet these changing consumer needs, active participation is preferred that provide transformational experiences through world-class natural settings.

Road trips

Self-drive adventures offer visitors a sense of familiarity and safety in a world of uncertainty. Road trips will continue to flourish and provide the opportunity for social and economic benefits in communities. Road trips present the opportunity for a halo effect, where visitors are dispersed across the tourism region, supporting local communities and aiding economic recovery off the beaten track.

Reconnecting

Travel brings people together. It offers the opportunity to learn about people and places. Visitors are seeking human touch tied seamlessly with digital enhancements. As we re-emerge, visitors will be seeking hidden gems, dream destinations and unique experiences that tie people and place.

Technology powered

The use of digital vaccine passports, contactless experiences and real-time travel notifications, highlight that technology will be a critical enabler in the coming years. Opportunities in VR and AR present options for storytelling and deeper connections between visitors and place. Changing customer journeys also emphasise the need for seamless online booking systems.

Focus on sustainability

Off the back of COP26, there is a growing global interest in sustainable practices. Visitors are seeking low impact options and genuine commitments to environmental initiatives. Enhanced transparency from hotels, experiences and destinations is increasingly important. Visitors are expecting operators across also sectors to connect with them on their social, environmental, cultural and economic impacts.

Implications for Mackay

As domestic and international borders re-open there will be intense competition for visitation. Visitors will have more opportunities to select destinations that reflect their aspirations and values. Mackay Isaac Region needs to ensure that its wide-open spaces, safety and accessibility are front and centre of promotional opportunities. Images of connection will be powerful in the short to medium term.

As European markets slowly return, authentic commitments to social, cultural and environmental benefits and local economic outcomes will create competitive advantage for destinations. Business events and the FIFO market remain strong targets for the region, creating new reasons to keep these people during their time off.

Vision

To be a must visit destination known for its memorable, authentic and unique nature based and heritage experiences and events.

Brand Promise

Be inspired and entertained as you discover unspoilt nature, unique events, heritage and vast adventures.

Themes

Embracing the following themes, the Mackay Isaac Region tourism industry will work collectively to deliver stronger visitor experiences that create benefits for local businesses and communities, and that protects natural landscape and culture that the industry is dependent on:

- Eco-Adventure
- Arts & Heritage
- Unspoilt Nature
- Events
- Sports Tourism

Purpose

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.

Goals

- Foster community pride in the region to build and strengthen the consistency of image.
- 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.
- Develop home-grown events and attract significant events to the region that play a key role in driving visitation in non-peak tourism periods.
- Build community awareness and pride in the importance of tourism throughout the entire region to activate the VFR market.
- Attract and retain a skilled (local) workforce.
- Improve the skills and knowledge of the local tourism workforce to deliver sustainable, transformational experiences that exceed consumer expectations.
- Build on the regional approach to destination branding and awareness, focusing on both the coastal and inland attributes of the entire region to promote the unspoilt natural attractions.
- Alignment to State led tourism programs.
- Increase the number of international and domestic trade ready tourism experiences in the region.

Targets

- Increase in community sentiment of tourism in region from 66% (2021) to 75%.
- Increase in full-time tourism employment opportunities to 4,285 (baseline 3,897 2018/19).
- Providing skilled local workforce through the provision of 8 training workshop opportunities annually.
- Extend average length of stay of business travel from 4.64 to 4.93.

Strategic pillars

Based on insight and analysis from consultation, the following pillars will support the future of tourism in the Mackay Isaac Region led by visitor needs and data driven decision making.

Experience & Product Development

Visitors are seeking experiences that are unique, memorable, and transformative. Experiences that awaken the senses and change the way they think. Actions under this pillar prioritise experience and product development, building the commissionable product and experiences across the region that awaken the soul and create a lasting impact.

Destination Marketing

Responsive marketing to ongoing changes in market conditions is critical to position the Mackay and Isaac region competitively in the short and long term.

Actions under this pillar support a focused marketing approach that capitalises on core markets and engages visitors with unique, memorable & authentic representations of the unspoilt nature of the region.

Events

Strategic engagement with events can support year-round visitation and present new reasons to visit.
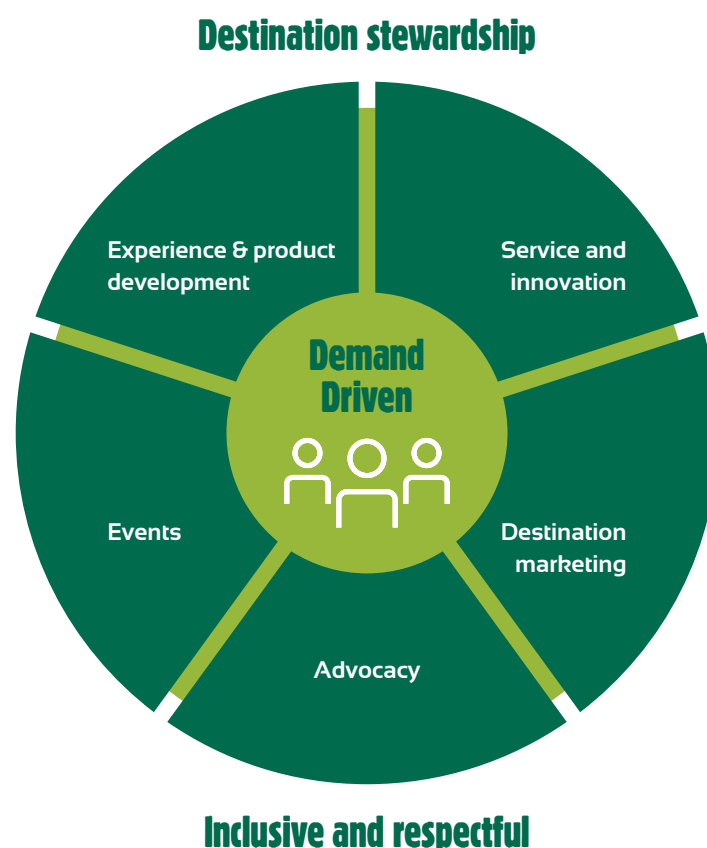
Actions under this pillar support strategic event management and delivery to smooth seasonal trends and build recognisable and uniquely Mackay and Isaac regional events. This pillar includes business, sporting and leisure events and conferences.

Advocacy

Mackay Isaac Tourism represents tourism operators across the region at a local, state and federal level.

Actions under this pillar build a united voice across the tourism industry and support community pride and local engagement with the tourism industry.

These actions will be delivered with a focus on destination stewardship, whereby the region balances the needs of the environment and communities whilst simultaneously operating in a way that supports good knowledge and data, and whereby decisions are made on mutually beneficial outcomes.[5] Furthermore, ensuring inclusiveness and respect across the region, making sure all guests are welcomed with equity and dignity.

Destination stewardship

Experience & product development

Service and innovation

Demand Driven

Events

Destination marketing

Advocacy

Inclusive and respectful

[5]WTTC, 2021 – Destination Stewardship Framework
https://wttc.org/Portals/0/Documents/Reports/2021/Destination-Stewardship-Framework.pdf?ver=2021-07-22-091804-637

Actions

The actions outlined below rely on a collaborative approach to tourism delivery. Whilst a *Lead Stakeholder* is identified, other support stakeholders across the tourism network are required for successful outcomes.

MRC Mackay Regional Council
IRC Isaac Regional Council
MIT Mackay Isaac Tourism
QTIC Queensland Tourism Industry Council
TEQ Tourism and Events Queensland,
TI Tourism Industry
FNT First Nations Tourism
NTO Non-Tourism Organisation

Experience Development

	Activate Immediate	Lead	Advance Mid-Term	Lead	Accelerate Long-Term	Lead
First Nations Tourism	1.1 Build meaningful relationship with Traditional Owners that supports aspirations for First Nations Tourism opportunities.	MIT FNT QTIC	1.2 Support cultural training delivery across tourism operators in the Region to build awareness and knowledge.	FNT MIT	1.3 Culture first. Work with Traditional Owners to embed cultural opportunities into existing and new experiences.	FNT TI MIT
Workforce Development	2.1 Quality development of existing experiences through guest service training.	MIT	2.2 Address workforce shortage through targeted schools' engagement – building awareness of opportunities in the tourism industry and supporting narrative of long-term career opportunities.	MIT	2.3 Collaborate with QTIC and the regional tourism network to address barriers to workforce engagement such as working conditions, convenient and affordable housing options for tourism workers.	QTIC
Alignment to State Programs	3.1 Alignment to TEQ programs (Best of Queensland) – increase ATDW listings & online book ability.	MIT	3.2 Meaningful delivery of Travel for Good through authentic delivery of natural experiences.	MIT TI		
Experience Mentoring	4.1 Build on experience mentoring program to support businesses in delivering transformational experiences.	MIT TEQ	4.2 Support tourism operators to package and bundle through mentoring and incentives.	MIT		

	Activate Immediate	Lead	Advance Mid-Term	Lead	Accelerate Long-Term	Lead
Infrastructure Development	5.1 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.	MIT	5.2(a) Utilise the Waterfront PDA to support investment in tourism experiences that connect with reef and islands. 5.2(b) Support development of infrastructure for priority initiatives including Mountain Biking.	MRC MIT	Initiate any identified infrastructure developments from the Isaac Tourism trails strategy.	IRC
Cross-sectoral Experiences	6.1 Identify potential agritourism opportunities.	MIT				
National Parks	7.1 Examine opportunities for more sustainable staffing approach for Wallabies experience (potential FN opportunity). Work with QPWS to develop and inform on improved visitor experience and information on Peak Ranges.	MIT QPWS IRC				
Strategic	8.1 Focussed RV strategy for each of the Mackay and Isaac Regions.	IRC MRC	8.2 Implementation of RV actions.	IRC MRC	8.3 Camping opportunities development.	IRC
Investment attraction	9.1 Attraction of new commercial experiences through activation of Tourism Opportunities Plan (e.g. opportunities adjacent to Marine and National Parks) through a shift of resources and prioritisation in Mackay Isaac Tourism	MIT	9.2 (I) Partner with mining company(s) to develop and deliver a mining experience – big toys. 9.2 (M) Investment attraction for and development of the Mountain Bike Park.	IRC NTO MRC		

Destination Marketing

	Activate Immediate	Lead	Advance Mid-Term	Lead	Accelerate Long-Term	Lead
Recovery	1.1 Facilitate a continuous suit of recovery marketing to support businesses and destination regain lost market share.	MIT		MIT		
Web Marketing	2.1 Audit of visual content to address gaps.	MIT	2.2a Revise Mackay consumer facing website as per audit recommendations. 2.2b Address weakness in visual audit & continue to build content.	MIT		
Themed Marketing	3.1a Delivery of marketing actions from the Mackay Regional Fishing Strategy and Mackay Region Mountain Bike Strategy. 3.1b Commit resources to Barramundi Highway collective.	MRC MRC MIT RRC	Delivery of marketing strategy of the Isaac Tourism trails network from the associated strategy.	IRC		
Marketing for Visitor Dispersal	4.1 Encourage visitor dispersal through targeted marketing campaigns with key partners.	MIT TEQ	4.2 Audit visitation levels to National Parks and market in line with capacity.	QPWS MIT		
Cooperative marketing	5.1 Foster relationships with key delivery partners to leverage investment in marketing and provide co-op opportunities.	MIT	5.2 Work with industry to package executive mining opportunities. Partner with resource industry to deliver.	MIT		
Story-telling	6.1 Develop Isaac stories – sheep shearer strike, mining (gold rush) – to augment the regional identity of the Isaac.	IRC MIT	6.2 Raise awareness of the Isaac Region through targeted marketing campaigns around the nature and heritage of the region.	MIT		

Advocacy

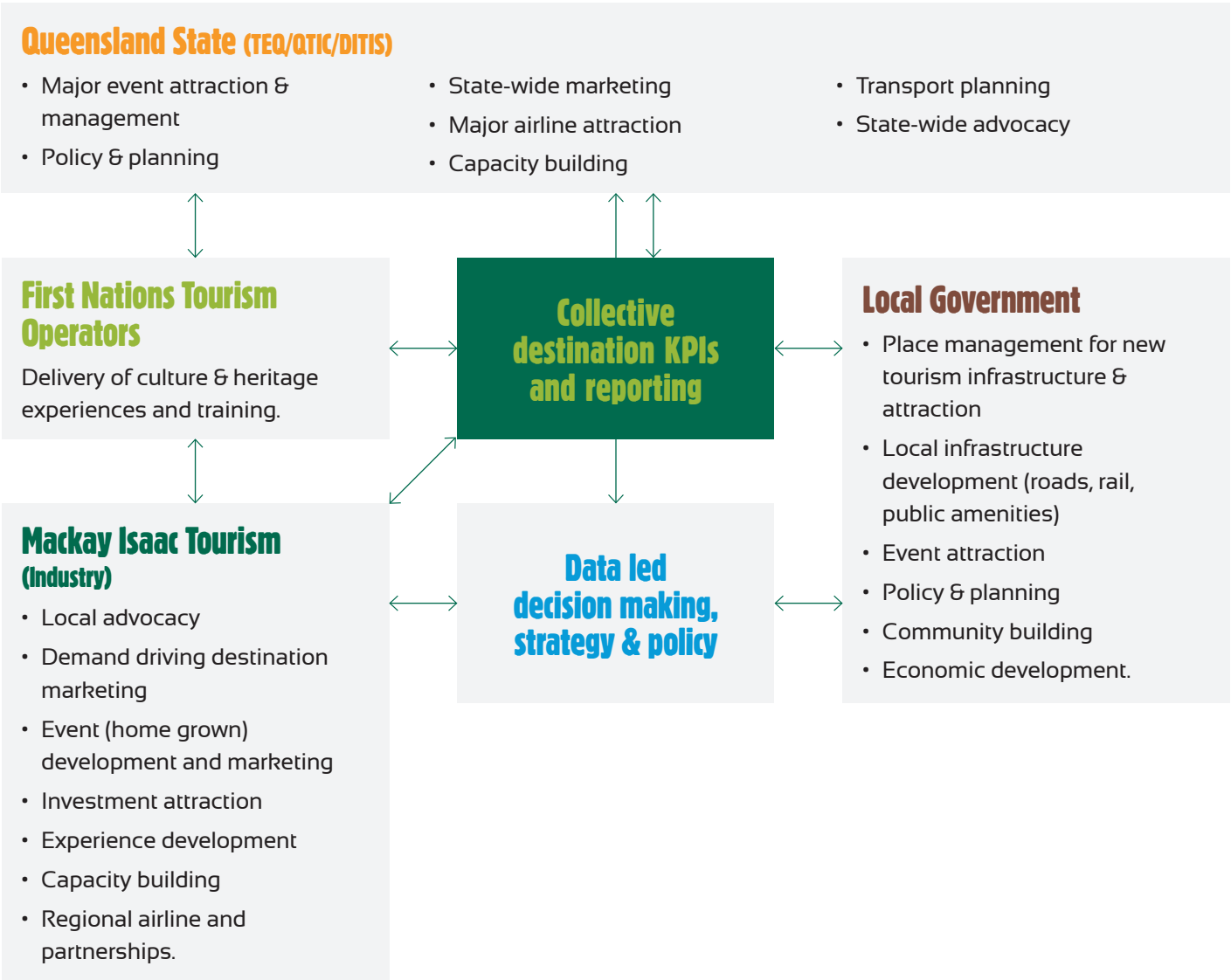|	Activate Immediate	Lead	Advance Mid-Term	Lead	Accelerate Long-Term	Lead
Local value of tourism	1.1 Promote local opportunities to local people to support community engagement with tourism.	MIT MRC IRC	1.2 Enhance community led campaign that fosters local pride.	MIT MRC IRC	1.3 Maintain relationship with community through news column and marketing efforts.	MIT
Community perception and sentiment	2.1 Build local narrative to develop a consistent Regional voice based on resident and visitor perception.	MIT	2.2 Reinforce local narrative, build awareness across tourism markets and feed through marketing priorities.	MIT		
Digital connectivity	3.1 Advocate to Federal Government for Black Spot Reduction through Round 6 of Mobile Black Spot Program and digital infrastructure development for valley areas.	GW3 MRC IC QTIC				
Strategic advocacy	4.1 Develop a multi-year advocacy plan for the region to address priority challenges (e.g. visa reform, workforce & digitisation).	MIT	4.2 Deliver on actions identified as priority advocacy and remain adaptive to changing industry needs.	MIT	4.3 Deliver on actions identified as priority advocacy and remain adaptive to changing industry needs.	MIT
Planning review	5.1 Review laws, policies and planning schemes to ensure Council & State requirements facilitate positive destination experiences.	MRC IRC MIT				
Disaster preparedness	6.1 Advocate for MIT to play a role in the Local Disaster Management Groups.	MIT	6.2 Capacity building for operators on risk reduction and adaptation.	MIT	6.3 Resilience embedded across all development actions and capacity programs.	MIT

Events

	Activate Immediate	Lead	Advance Mid-Term	Lead	Accelerate Long-Term	Lead
Strategic approach to events	1.1a Clearly define roles and responsibilities to effectively deliver the Mackay Region Event Strategy. 1.1b Develop and deliver an effective events strategy for Isaac.	MIT MRC IRC	1.2 Explore potential models for a stand-alone convention bureau model.	MIT MRC IRC		
	2.1 Plan a strategic calendar of events to even shoulder periods and drive consistent visitation and spend to the region. Accessible through an online calendar.	MIT MRC IRC	2.2 Reinforce local narrative, build awareness across tourism markets and feed through marketing priorities.	MIT		
Capacity building	3.1 Build capacity of events for economic, social and environmentally sustainable event delivery creating a long-term proposition aligned to the QDEP.	MRC IRC MIT	3.2 Build awareness of the Queensland Destination Events Program (QDEP) – and support event organisers to apply for funding through the program.	MIT		
Sporting events	4.1 Program of bush sport events that can create a pathway to cultural Olympic events.	IRC MIT	4.2 Create opportunities for sporting events building awareness of the Region in elite sporting competitions and training opportunities.	MRC	4.3 Leverage the 2032 Olympic and Paralympic pathway as a key host to training and elite sport events.	MRC IRC MIT
Growing events	5.1 Support existing community event operators in effectively scaling and managing events where viable tourism events exist.	IRC	5.2 Develop calendar of home-grown events for Isaac Region.	IRC MIT	5.3 Focus on bush-sport.	IRC

Catalytic Industry-Wide Projects

	Activate Immediate	Lead	Advance Mid-Term	Lead	Accelerate Long-Term	Lead
Data led decision making	1.1 Utilise new data sources to provide support to operators and partners.	MIT TI	1.2 Use data to better understand demands on National Parks & advocate for supporting infrastructure.	QPWS		
Airline partnerships	2.1 Work with Mackay, Moranbah & Clermont airports, and key partners to create attractive route opportunities.	MIT	2.2 (M) Support Mackay Airport in developing routes to all major cities across Australia. 2.2 (I) Continued route development in partnership with Moranbah & Clermont airports.	MIT		
Sustainable & resilient futures	3.1 Understand the regional carbon footprint and pathway to net-zero in alignment with Government goals. Encourage operators to measure carbon footprint.	MRC IRC MIT	3.2 Explore opportunities for adaptation and to support industry on pathway to net-zero. Continued monitoring and measurement of carbon footprint.	MIT	3.3 Regional off-set program.	MIT
Accessibility	4.1 Work with operators to promote accessible experiences.	MIT TI	4.2 Create opportunities for sporting events building awareness of the Region in elite sporting competitions and training opportunities.	MIT		
Industry Networking	5.1 Offer 4 industry networking events to enhance destination/ experience clusters and facilitate collaborative outcomes.	MIT				
Industry and Strategic Partnerships	6.1a Formalise opportunities for industry to share knowledge e.g. networking events, product sharing events etc. 6.1b Facilitate joint bi-annual strategic planning workshops with Mackay Regional Council and Isaac Regional Council Economic Development teams.	MIT				

Roles & responsibilities

Clearly defined roles and responsibilities across the network facilitate stronger partnerships, enhanced performance outcomes and efficient reporting and accountability, driving confidence for the long-term sustainability of the region.

Queensland State (TEQ/QTIC/DITIS)

- Major event attraction & management
- Policy & planning

- State-wide marketing
- Major airline attraction
- Capacity building

- Transport planning
- State-wide advocacy

Collective destination KPIs and reporting

First Nations Tourism Operators

Delivery of culture & heritage experiences and training.

Mackay Isaac Tourism (Industry)

- Local advocacy
- Demand driving destination marketing
- Event (home grown) development and marketing
- Investment attraction
- Experience development
- Capacity building
- Regional airline and partnerships.

Data led decision making, strategy & policy

Local Government

- Place management for new tourism infrastructure & attraction
- Local infrastructure development (roads, rail, public amenities)
- Event attraction
- Policy & planning
- Community building
- Economic development.

Tourism Australia	To make Australia the number 1 choice for international visitors.
Tourism & Events Queensland	To make Queensland the number 1 choice for domestic and international visitors.
Mackay Isaac Tourism	To make Mackay and Isaac the preferred nature-based escape for travellers to Queensland and the Regional events capital.
Councils	To build community pride in local tourism opportunities.
Operators/Events/Members	To make their experience the must do/visit.

Appendix - List of stakeholders

The following stakeholders participated in the consultation process:

Stakeholder	Organisation
Mayor Greg Williamson	Mackay Regional Council
Cr Belinda Hassan	Mackay Regional Council
Cr Karen May	Mackay Regional Council
Cr Fran Mann	Mackay Regional Council
Cr Michelle Green	Mackay Regional Council
Michael Thomson	Mackay Regional Council
Cr Justin Englert	Mackay Isaac Board
Rob Kidd	Mackay Isaac Board
Rob Coco	Mackay Isaac Board
Cr Jane Pickels	Mackay Isaac Board/ Isaac Regional Council
Nic Willis	Mackay Isaac Board
Charlie Bone	Mackay Isaac Board
Adrian Miles	Mackay Isaac Board
Adrian Young	Mackay Isaac Board
Tas Webber	Mackay Isaac Tourism
Shane Brandenburg	Isaac Regional Council
Chrissy Evangelou	Mackay Isaac Tourism
Liana Jones	Mackay Isaac Tourism
Beau Jackson	Isaac Regional Council
Mayor Anne Baker	Isaac Regional Council
Jeff Stewart-Harris	Isaac Regional Council
Rob Perna	Isaac Regional Council
Cr Viv Coleman	Isaac Regional Council
Cr Carolyn Moriarty	Isaac Regional Council
Jessica Pollard	Copperfield Heritage Horse and Pony Hire
Jim Shilvock	Copperfield Heritage Horse and Pony Hire
Penny Morgan	Isaac Regional Council
Frieda Berry-Porter	The Outback Prospector
Leann Priestly	GW3
Michael Pugh	Central Queensland Hike & Explore
Ian Mason	Sarina Sugar Shed
Fiona Okpalogu	Rydges Mackay Suites
Glenys Mansfield	Isaac Regional Council
Georgia McCurtain	Vacations Keswick Island

Stakeholder	Organisation
Renae Atherton	Cape Hillsborough Tourist Park
Melissa Wescott	Big on Shoes, Moranbah blooms and events
Adrian Miles	Mackay Airport
Kylie Rogers	Mackay Regional Council
Nadine Connolly	Mackay Regional Council
Teona Cousin	Mackay Regional Council
Nele Hahne	Mackay Regional Council
Sarah Devin	Quest on Gordon
Alta Snyders	SideTrax
Claire Grant	Queensland Parks and Wildlife Services
Rachel Klitscher	Tourism and Events Queensland
Leonard Chong	Tourism and Events Queensland
Amanda Pelagalli	Wake House
Ben Douglas	Casa Nostra
Cath uit den Bogaard	Comfort Resort Blue Pacific
Ann Hand	Gum Valley Veterans and Natural Terrain MX Club
Meaghan Thompson	Sarina Beach Motel
Michelle Camilleri	One Hungry Mumma
Perry Finbow	Riviera Mackay
Adriette Meyer	Ibis Mackay Airport
Heather Schaper	Studying Diploma in Social Media Marketing
Irene Adams	Yuwi
Trent Wilkinson	Indigenous Economic Development

Strategy mapping

There is an abundance of existing tourism strategies, documents and guidelines that outline appropriate strategies for future development of the region. Relevant documents will mainly be from a local and regional level that will focus on specific areas of interest. State and national strategies are also important to understand how these may impact the development.

Mackay Tourism Opportunity Analysis

This report looks to identify and assess the viability of new and existing tourism development within the Mackay region. One priority project identified is the Theresa Creek Dam fishing lodge. As a premier accommodation for anglers, this project is seen to have potential return on investment and would create supply of an additional 40-60 twin share rooms.

A wellness and Eco-Adventure lodge at Eungella could capitalise on its proximity to the Broken River and Dam offering complimentary active fishing experiences that promote a connection to nature.

The analysis notes Mackay's future opportunities and need for additional experiences to support the current destination proposition.

Mackay Economic Development Strategy 2020-2025

The economic strategy has the vision to encourage sustainable and diversified jobs and investment in the Mackay region. The Mackay Region Economic Development Strategy 2020-2025 provides a strategic framework and action plan to deliver a coordinated regional approach to economic development and sustainable economic growth. The plan provides a strategic framework for actions over the following pillars: Advocacy and Leadership, Investment Attraction, Industry Development and Workforce and Skills.

Mackay Region Recreational Fishing Strategy 2017 – 2022

This strategy set the framework for the sustainable management and development of recreational fishing in the region. The strategy contains three main themes of: nurturing our assets, building growth and target markets. The aim of this strategy was to see an increased contribution to the wider Mackay economy from recreational fishing, recognition of the region as a premier fishing destination, reduction in un-sustainable fishing and improved environment for all marine species.

Mackay Regional Camping Analysis

The report provides recommendations for the Mackay Regional Council owned campsites. There are three main outputs: A framework to guide future investment of council camping facilities, an analysis on the current sites ability to respond to demand and the future opportunities for camping and recreational activities at the council owned campsites.

Mackay Region Event Strategy 2020-2025

The purpose of this report is to set a new direction and framework for events within the Mackay Region. Gaps and opportunities were identified and resulted in four key delivery priorities: to set structures in place, create the environment for success and sustainability, evaluate, evolve, and develop, acquire, and partner. This strategy identifies the value of collaboration and partnerships, and the opportunity to leverage the existing domestic connectivity between Rockhampton and Mackay (i.e., for access to expanded target markets / event audiences). The strategy also notes the need for further investigation of opportunities relating to coastal offering, culinary delights and focus on experiences.

Isaac Tourism Strategy 2019-2024

The strategy identifies the key market for the Isaac Region as prospectors, campers and caravan markets and those visiting friends and relatives. The five-year direction for the region includes defining and telling the Isaac story; enhancing the visitor experience; building tourism offering; supporting businesses and maximising relationships.

Isaac COVID-19 Recovery Plan

The plan offers a tactical response plan, framework for establishing the community chest to support SMEs and the framework for establishing special community grants to support not for profit community organisations. For the tourism industry, key actions include exploring opportunities for tourism accommodation to be established, collect and promote the Isaac narratives, additional support for the facilitation of private tourism development and an overhaul of visitor information portals. In addition, the strengthening of community pride facilitates strong tourism experiences.

Community Strategic Plan: Isaac's 20 year vision

The Community Strategic Plan is the blueprint for future generations in the region. The plan puts forward the vision for vibrant communities, a strong economy, a healthy environment and effective and sustainable infrastructure and the actions to achieve this vision by 2035. Founded on the themes of communities, economy, infrastructure and the environment, the plan sets goals for strong and diverse communities to live, work and raise families; to be the number one performing regional economy based upon thriving, resilient and a diverse mix of industry sectors; to have effective and sustainable infrastructure that supports the needs of the region's communities and economic sectors; and to balance the economy and environment to manage and protect natural resources. Tourism plays a key role across these sectors.

Isaac Economic Development Framework (2019-2024)

Isaac Regional Council play a key role in facilitating economic prosperity. They achieve this through advocacy, facilitation, regulation, collaboration, planning and the provision of services. Four key economic sectors are identified within the region, agribusiness, construction, manufacturing, and mining. Whilst tourism is not seen as a key economic driver, it is important to the region and a separate Tourism Plan was developed. A key action within the plan that will support the growth of tourism is the implementation of the Business Support Strategy to support stronger business practices, build capacity and drive innovation. Furthermore, aspirations around Isaac as an attractive place to live, work and play, and for businesses to establish and grow, is important with tourism building lifestyle opportunities.

State strategies

Tourism Industry Reference Panel's Interim Action Plan for Tourism Recovery

The plan explores the opportunity to reset the tourism industry with a 100-day action plan to reignite tourism across the state. Outlined under demand is a focus on sustainability, 2032 Games and First Nations. Under supply, the theme explores new ways of working across the tourism industry. The plan is underpinned by the priority of connectivity, engaging investment and funding, talent and skills. Consumer led decision makers sit at the heart of strategy.

Building a Resilient Tourism industry: Queensland Tourism and Climate Change Response Plan

This document supports the Queensland tourism industry to respond to the challenges and opportunities of climate change. The plan sets out six key priorities: resilient businesses, destinations and communities, stewardship and education for healthy natural assets, green tourism industry, diversified products, sustainable marketing and collaboration between industry, government and communities. The plan focuses on collaboration, as that will be the way to combat the risks of climate change.

Queensland Tourism and Transport Strategy

The Queensland Tourism and Transport Strategy details the governments plan to develop and improve access to the Queensland tourism destinations. The aim is to enhance the visitor experience while also growing the tourism industry in the state. There are four key priorities: visitor information, transport services, ticketing and products, planning and investment. All of the actions from these priority areas require collaboration across the public and private sectors.

Queensland First Nations Tourism Plan – 2020-2025

Queensland's first strategy for First Nations Tourism Development across the state sets the vision for Queensland to be Australia's number 1 global destination of choice for tourism experiences in 2030. Goals of the plan include recognition and respect, engagement and partnership, strategic coordination, training and skills development, authentic product development, and marketing and awareness. The plan focusses on growing innovative and sustainable First Nations experiences. It seeks to build capacity and foster the development of authentic, engaging, and sustainable tourism experiences that respect First Nations cultures, knowledges, and connection to country.

Inclusive Tourism

Whilst the strategy may be out of date (2016-2020), consideration of accessibility should be prioritised, especially across new investments. The Inclusive Tourism Strategy was developed to ensure that businesses are accessible and inclusive to those with physical and intellectual disabilities. It presents the aspirational goal of making experiences and destinations open to everyone.

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