MACKAY TOURISM OPPORTUNITY ANALYSIS

JUNE 2020

A BUSINESS CASE ASSESSING A NUMBER OF TOURISM INVESTMENT OPPORTUNITIES IN THE MACKAY REGION

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TABLE OF CONTENTS

LIST OF FIGURES

LIST OF TABLES

ABBREVIATIONS

ABS	Australian Bureau of Statistics
BCR	Benefit-Cost Ratio
CBD	Central Business District
IRR	Internal Rate of Return
IVS	International Visitor Survey
LGA	Local Government Area
MTL	Mackay Tourism Limited
NVS	National Visitor Survey
NPV	Net Present Value
QPWS	Queensland Parks and Wildlife Service
SA2	Statistical Local Area 2
TEQ	Tourism and Events Queensland
TRA	Tourism Research Australia
VFR	Visiting Friends and Relatives

EXECUTIVE SUMMARY

ABOUT THE PROJECT

Stafford Strategy (Stafford) was commissioned by Mackay Tourism Limited (MTL) to develop a Mackay Tourism Opportunity study to identify and assess the viability of new tourism investment to strengthen the competitiveness of the Mackay region. Our research and analysis have been informed by significant desktop research, structured interviews with industry operators and various government officials, and Queensland and national level tourism investment assessment.

PRIORITY PROJECTS

From this analysis, we have classified the two priority projects (out of a list of 53) which should act as the catalysts to help leverage new investment into the Mackay regional visitor economy. These include the following.

- The **Wellness & Eco-Adventure lodge at Eungella** which would be a new accommodation development on the escarpment overlooking the Pioneer Valley and potentially offering 60-80 twin share rooms, along with dining facilities for inhouse guests and day visitors coming mostly up from Mackay and potentially further afield. In addition, it should have a wellness day spa facility to help position Eungella as a visitor precinct for eco-nature experiences and health and wellbeing. It would probably be positioned as a 4-4.5-star facility.
- The second priority project is the **Theresa Creek Dam Fishing Lodge** in Isaac LGA with a strong focus on accommodation for anglers, for general lake leisure visitors and those attending the proposed fishing competitions. The development could potentially offer 40-60 twin share rooms along with dining facilities for a mix of inhouse guests and visitors generally coming to the dam lake as day visitors. It would likely be classified as a 3.5-4-star facility.

A top-line cost benefit analysis has been undertaken on both of these projects as per the brief, to indicate potential returns on investment as both are seen as primarily private sector investment initiatives and would need to be able to offer attractive returns to be treated as serious investment opportunities.

Table 1 illustrates the estimated net present value (NPV), internal rate of return (IRR) and benefit-cost ratio (BCR) and reflects the attractive returns which could be generated.

Both projects should be able to deliver an attractive NPV and IRR along with a positive BCR, which reflect that the each of the project's economic benefits outweigh the project's associated costs.

Table 1: Cost Benefit Results Summary

	MODEL 1	MODEL 2
	Eungella Eco-Lodge	Thersa Creek Fishing Lodge
Accommodation Guests Y1	22.1k	15.8k
Accommodation Guests Y10	25.9k	18.5k
Accommodation Occupancy Y1	65%	62%
Accommodation Occupancy Y10	76%	72%
Required Yield	12.0%	12.0%
Discount Rate	7.0%	7.0%
Cashflow Y1	$3.4m	$2.0m
Cashflow Y10	$5.4m	$3.2m
CAPEX	$28.0m	$13.3m
IRR	✔ 19.2%	✔ 23.8%
NPV	✔ $27.2m	✔ $19.1m
BCR	✔ 1.13	✔ 1.28

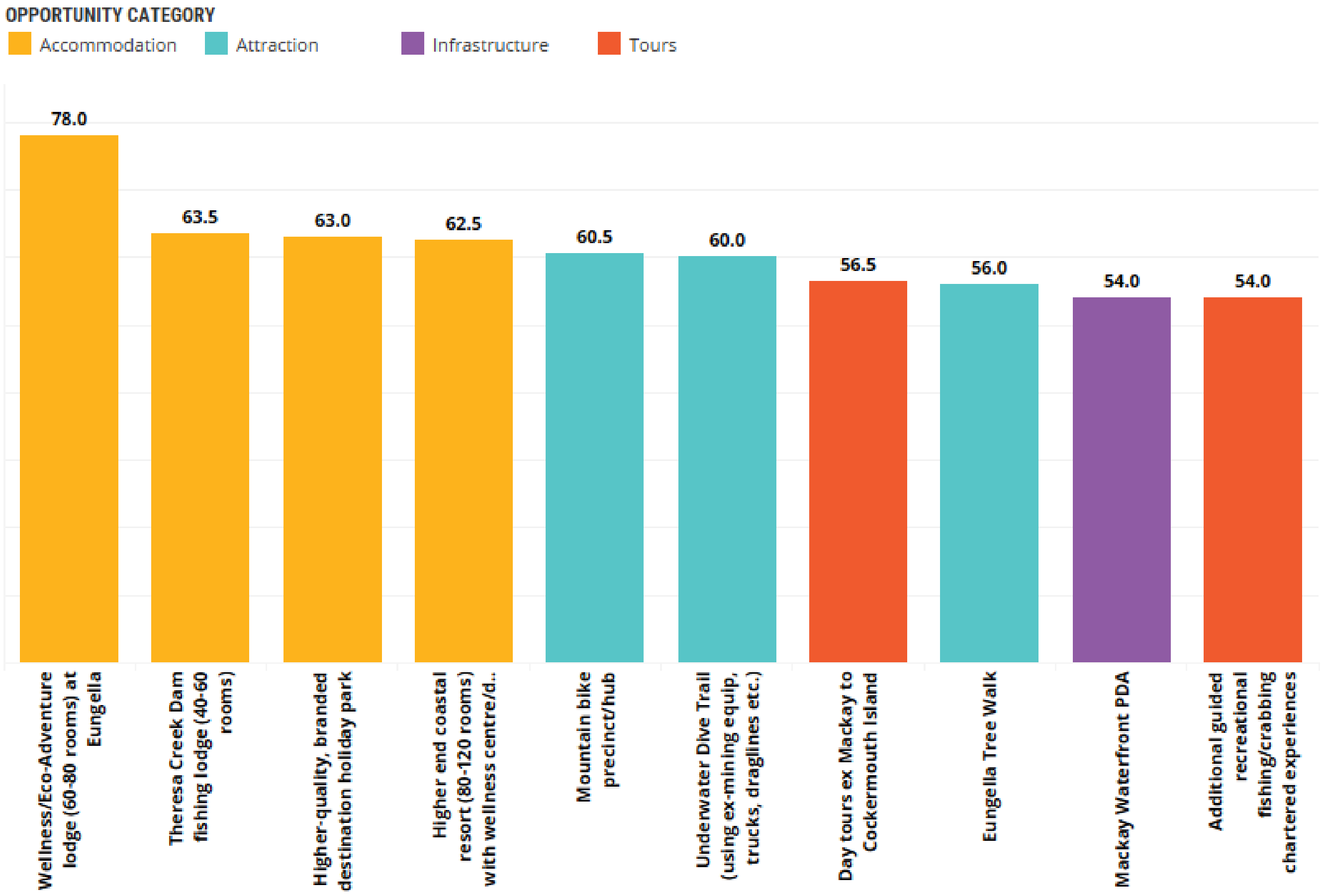
It is also important to note that the estimated room occupancy levels included in the modelling are realistic but conservative so there is every likelihood that with astute marketing and service delivery, stronger occupancy levels can be generated.

OTHER IMPORTANT INVESTMENT PROJECTS

While there were 53 identified tourism investment projects presented in this report, Figure 1 offers the ranking of the top 10 tourism investment opportunities only, to illustrate that they contain a mix of new accommodation investment opportunities in locations not already serviced by existing operators, new forms of visitor attractions and experiences, and different forms of day tours.

The ranking achieved by each of the projects is noted above the bar chart for each, reflecting the strength of the Wellness & Eco-Adventure lodge at Eungella, the similarity in ranking between the next 5 projects (60-63.5) and then separately, the final 4 projects (54-56.5).

Figure 1: Top 10 Projects Identified



Although the majority of visitor attractions, tours and experiences do not rank as highly as the top accommodation development projects, this is because of the weighting in the rankings which favour larger private sector investment projects, those which can offer greater employment potential, and those which are seen to help leverage other forms of investment (often new tours and attractions including mountain biking, gold and related mining tours, treetop walkways etc.).

We appreciate that new accommodation development comes with a higher capital cost requirement and therefore is more challenging for MTL to be able to move these forward. There are, however, opportunities for MTL to create a partnership model to act as the facilitator for smaller capex projects but which are still important, such as a variety of tours.

TOUR BASED PROJECTS

As is suggested within this study, MTL could be the facilitator to move forward various priority tour-based projects including the following, which have been identified as higher priority tour-based projects for the Mackay region. Tour projects are singled out in this report as there is currently minimal tour product within the Mackay region so a clear product gap exists. Furthermore, the cost of creating and activating tour opportunities is far lower than say for creating and developing new visitor attractions and new or upgraded accommodation facilities.

As such, it may be possible for MTL to activate tour opportunities in a shorter timeframe, providing that funding is available to develop and refine tour concepts and to complete feasibility studies to show they are commercially viable.

- **Island Day Trips**. For a significant city situated next to the Great Barrier Reef, Mackay has no regular day trip operation to the islands or reef. A smaller fast craft carrying up to fifty passengers doing day trips to islands in the South Cumberland Group should be more sustainable and less capital intensive. Mackay residents should be able to provide an initial customer base while visitor numbers grow.
- **Nature and Food Based Tours.**
  Mackay region lacks day tours to get visitors out into the wider region. A coach tour ex Mackay taking visitors to Finch Hatton Gorge for the waterfall experience and rainforest, Pioneer Valley for food experiences and Eungella National Park for bush walks, platypus viewing and lunch on the escarpment offers a good mix of product. With Eungella being approximately one hours drive by coach from Mackay, and

with adequate time to do nature walks etc, we suspect this tour product is likely to be 6-8 hours duration, so more of a day tour than ½ a day. The coach experience should also be offering audio dialogue of the interesting history and food production of the area, along with nature-based facts and figures. Eventually the tour should also link in the Eungella Tree Walk suggested attraction experience and dining at the proposed Eungella Wellness/Eco Adventure Lodge. In time, this tour could be extended to an overnight experience with accommodation at Eungella with nighttime nature walks and wildlife spotting. We suspect, therefore, that demand for such a tour will grow once the various other elements such as the tree top walk and the commercial accommodation and dining experience are available at Eungella.

- **Fishing Charters**. Mackay is well situated for recreational fishing with offshore, reef, coastal, estuarine, river and dam fishing. The dams are stocked and barramundi of about a metre in length are regularly caught. There are opportunities for charter fishing and boat hire. Charter fishing ranges from larger boats offshore to smaller boats on smooth water teaching visitors, for example, to fly fish for barramundi. The opportunity exists for anglers to not have to travel to the Gulf of Carpentaria or the Northern Territory for top class fishing.
- **Coral growing.** Ultra Coral Australia is planning to build a grow-out facility near Sarina. Their technology allows them to grow coral to replace damaged coral and should be nationally significant as well. The facility should attract a range of visitors from school students to grey nomads touring. There are also opportunities for Marine Coral Conferences and for visiting coral experts. Potential exists, therefore, to introduce a variety of tour packages.
- **Cape Hillsborough Nature Tour**
  This tour would potentially focus on the wallabies at Cape Hillsborough and wave in the history, geology and Aboriginal significance of the area along with nature interpretation. The option needs to also be explored for a possible morning tea at the Old Station Tea House as part of the experience and with various walking tours (shorter and longer) of the area. As Cape Hillsborough is only 40 minutes from Mackay, the option for a mix of ½ day and full day tours could be explored.

SITE MASTER PLANS

Various tourism investment opportunities have been identified in areas which provide the potential to cluster new tourism products together including commercial accommodation development, day tours and visitor experiences and attractions.

To support the various investment opportunities and to assist with their activation in realistic timeframes, consideration should be given to creating two master plans to support:

- The cluster of products and opportunities at Eungella National Park, Pioneer Valley and Finch Hatton Gorge which offer food, mountain biking and nature-based experiences; and
- The cluster of products and opportunities at Cape Hillsborough which offer wildlife, history and cultural experiences along with walking trails etc.

Master planning for both areas will ensure that both areas develop as highly sustainable and well-planned destinations for tourism and allow for infrastructure support such as car and coach parking, interpretative signage and wayfinding, etc.

A master planned approach will also assist in visitor management and integrating ways to manage visitor flows especially at peak times of the day to ensure a high-quality experience is generated.

Importantly, a master planned approach will also help identify ways to extend commissionable tourism product over time, as the regions currently have a heavy focus on free rather than charge for experiences. This is important if tour-based products are to be developed over time, as the region is currently heavily focussed toward a self-drive market.

MTL should be the facilitator for securing funding for these two master plans with funding partnership assistance being sort from councils and state government.

MTL INVESTMENT FACILITATION

Each of the various tourism investment opportunities will require concept development and a feasibility study/business case to ensure project proponents have determined correct capital investment levels, realistic operating costs and market demand forecasting. MTL, as the regions peak tourism industry body, could look to partnership opportunities with the Council and State Government to facilitate the investment process required. As MTL has strong local knowledge on the visitor economy and tourism investment requirements, it is ideally positioned to lead in this activity.

To help achieve this, consideration should be given by MTL to create an operating arm of its current structure focused on the following.

- Developing product concepts into investment packages for presenting to potential operators and investors locally, regionally and potentially nationally (taking a strong proactive approach).
- Facilitating the development of tourism projects through the funding of concept development and feasibility studies so

stronger investor/developer interest can be secured and in faster time frames.

- Working with State Government agencies such as the Department of Innovation and Tourism Industry Development, Economic Development Queensland, and local councils to develop a mechanism for jointly funding feasibility and business case development for priority tourism projects. This will allow MTL to access funding to support feasibility studies to illustrate their viability.
- MTL should then look to develop an investment prospectus which can outline the priority tourism investment projects which are needed for the Mackay region and to allow for this to be updated regularly as new projects get identified and existing projects start to get activated.
- For MTL to work with local councils and state government to facilitate a regular tourism investment forum (which might be stand-alone or could possibly be as a subset of general investment facilitation into the Mackay region) so that the desire for new investment is regularly kept front of mind of industry operators, developers and investors.

The key component for MTL would be to have access for funding to cover feasibility study and business case costs so that potentially 3-6 projects could be introduced per annum and ranging from smaller to medium-sized tourism projects and potentially clusters of projects where tourism precincts may be possible.

MTL should ideally be the facilitator for any new tourism and related precincts or hubs so its product expertise can be used to guide sensible and workable outcomes.

We have outlined in section 6.5 specific steps which MTL should look to undertake to secure new tour products as we note that the region is lacking in tour product especially and we offer a case study example to illustrate how it worked successfully.

SUMMARY

It is evident from the research and analysis that was undertaken for this project that there are many exciting opportunities to pursue; the modelling offers MTL a valuable mechanism for ranking of projects which is important as all 53 cannot be activated in the short term and by necessity, some need to lead as they, in turn, become catalysts to leverage interest in many others.

For the Mackay region, this is particularly timely and important noting that in this period post-COVID-19, many government agencies at various levels are keen to determine clever ways to reinvigorate their visitor economies, especially in light of the significant changes which have occurred to the market mix which is most likely needing to be attracted.

Stafford has found that there are many investors and developers looking to find attractive locations to invest in and projects which may offer lower risk and attractive returns on investment.

Having identified several new projects to consider, this study puts Mackay at a distinct advantage in determining what projects should now be focused on as priorities to help grow the product base and in turn, also support existing tourism businesses. The comparative analysis which has included looking at product within the surrounding regions of the Whitsundays and Rockhampton especially also provides valuable insight for the Mackay region in what its USP needs to be and its clear point of difference are.

1. CONTEXT & VISITOR TRENDS

1.1. BACKGROUND

Stafford Strategy (Stafford) was commissioned by Mackay Tourism Limited (MTL) to complete an opportunity analysis for tourism investment in The Mackay Region (the region). The purpose of the project is to:

- understand the opportunities for tourism-related business investment;
- provide detailed documentation of the investment opportunities;
- complete a thorough analysis of support required to gain business investment; and
- provide an understanding of funding streams possible to support tourism investment.

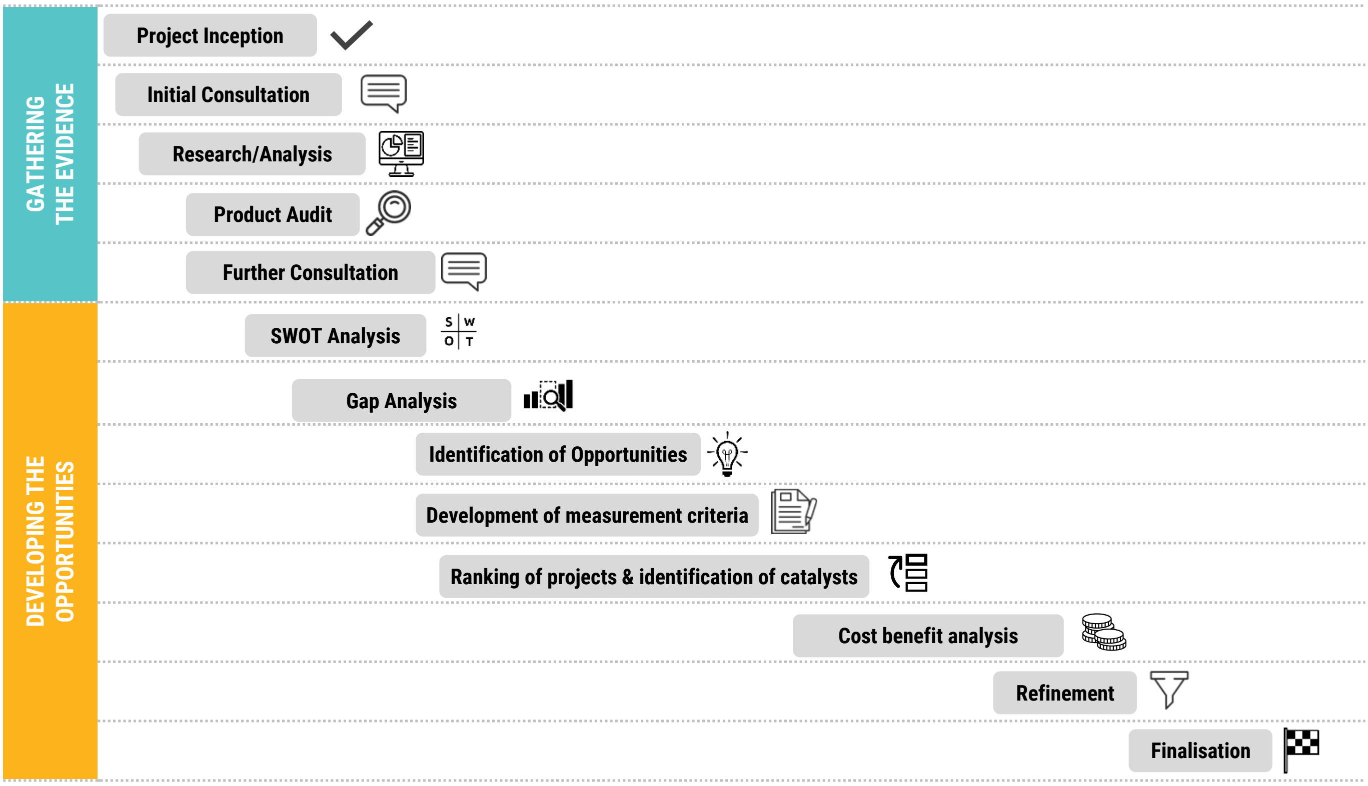
1.2. METHODOLOGY

Working alongside those directly involved in the visitor economy, this project was developed via a 13-stage process, which is outlined in Figure 2.

The ability to undertake onsite visits and in-person consultation was severely hampered by the COVID-19 pandemic which occurred while this project was being completed. Despite this, however, the project team engaged with many stakeholders throughout and outside of the region.

Stafford would like to take this opportunity to thank all those who have contributed to the development of this project. The contributions from stakeholders were invaluable to the development of this robust and pragmatic report.

Figure 2: Methodology



1.3. ABOUT THE MACKAY TOURISM REGION

The Mackay Region (the region) is home to an estimated resident population of 138,000 and is situated approximately at a midpoint-halfway along the eastern seaboard of Queensland. the region stretches from Midge Point and Laguna Quays in the north, to Clermont in the south-west, to Mackay city and the Cumberland Island group in the east and covers over 66,000 square kilometres.

There are two local government areas (LGAs) in the region, Isaac Regional Council (which covers 58,700 square kilometres) and Mackay Regional Council (7,600 square kilometres). 85% of the region's population resides in Mackay LGA (see Figure 3).

While both LGAs have experienced population growth between 2005 and 2019:

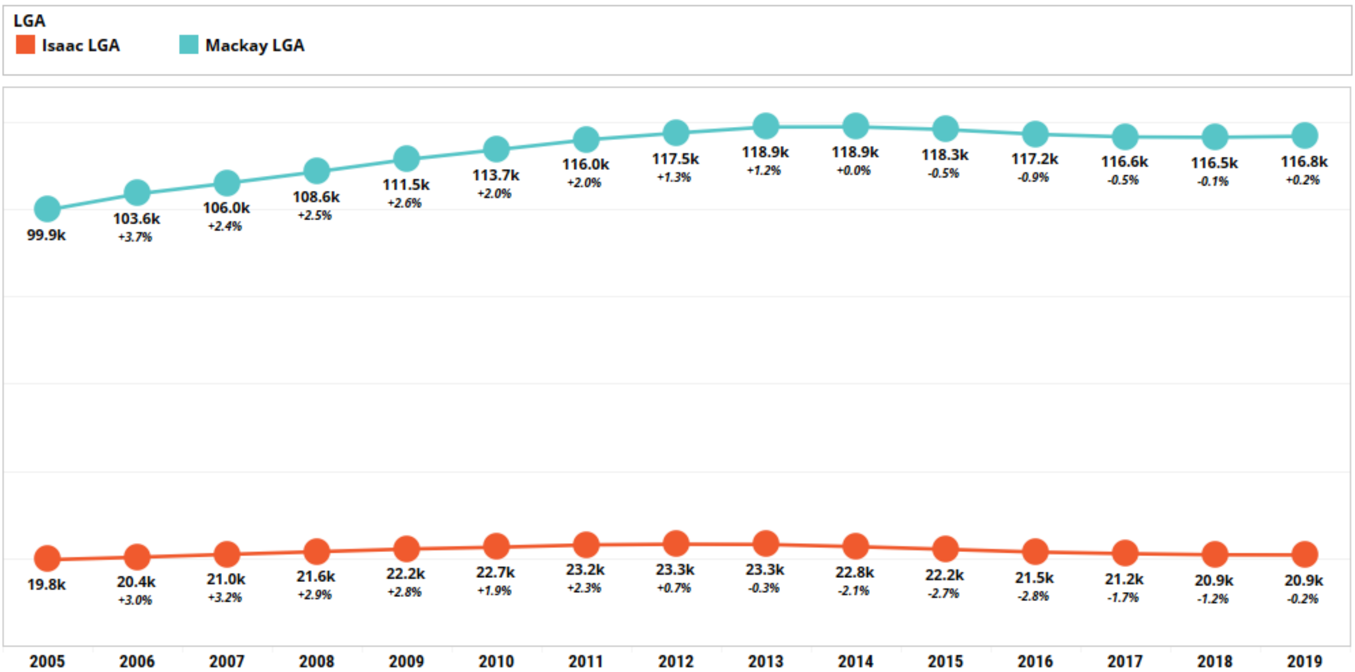
- the majority of growth has been in Mackay LGA, increasing by 17k residents (17% growth) compared with Isaac LGA which increased by just over 1.1k residents (6% growth); and
- noting, however, that Mackay's population growth has been volatile, tied to the local economy which is dependent on the resource sector (mining and, to a lesser, extent agriculture and food production) which has experienced a decline from 2013 which is considered an effect of the end of the mining investment boom in 2012.

With the largest population base and being strategically situated on the Bruce Highway, Mackay is the primary service centre in the region. The CBD of Mackay is situated 4.5 hours' drive from Townsville and just under 4 hours from Rockhampton, the two nearest major service centres and just under 2 hours to Airlie Beach in the Whitsundays.

Mackay itself is a relaxed tropical city, with a growing cultural, dining and arts scene. It has a number of key tourism assets such as Eungella National Park, the Pioneer River (one of the few 'blue water' rivers in the state, pristine beaches such as Cape Hillsborough) along with other natural experiences including wildlife spotting, fishing and diving. Mackay is positioning itself as an ideal holiday destination for those wanting to escape the crowds and to undertake accessible and unique experiences.

Isaac complements Mackay with a range of inland and coastal locations. The inland towns of Moranbah and Clermont offer rich cultural and heritage stories, while Clairview provides a coastal scene ideal for fishing and crabbing. Isaac also boasts 100km of underdeveloped coastline, vast agricultural and grazing pursuits, and Australia's largest coal deposit.

Figure 3: Mackay and Isaac Population Estimates[1]



[1] https://www.qgso.qld.gov.au/statistics/theme/population/population-estimates/regions

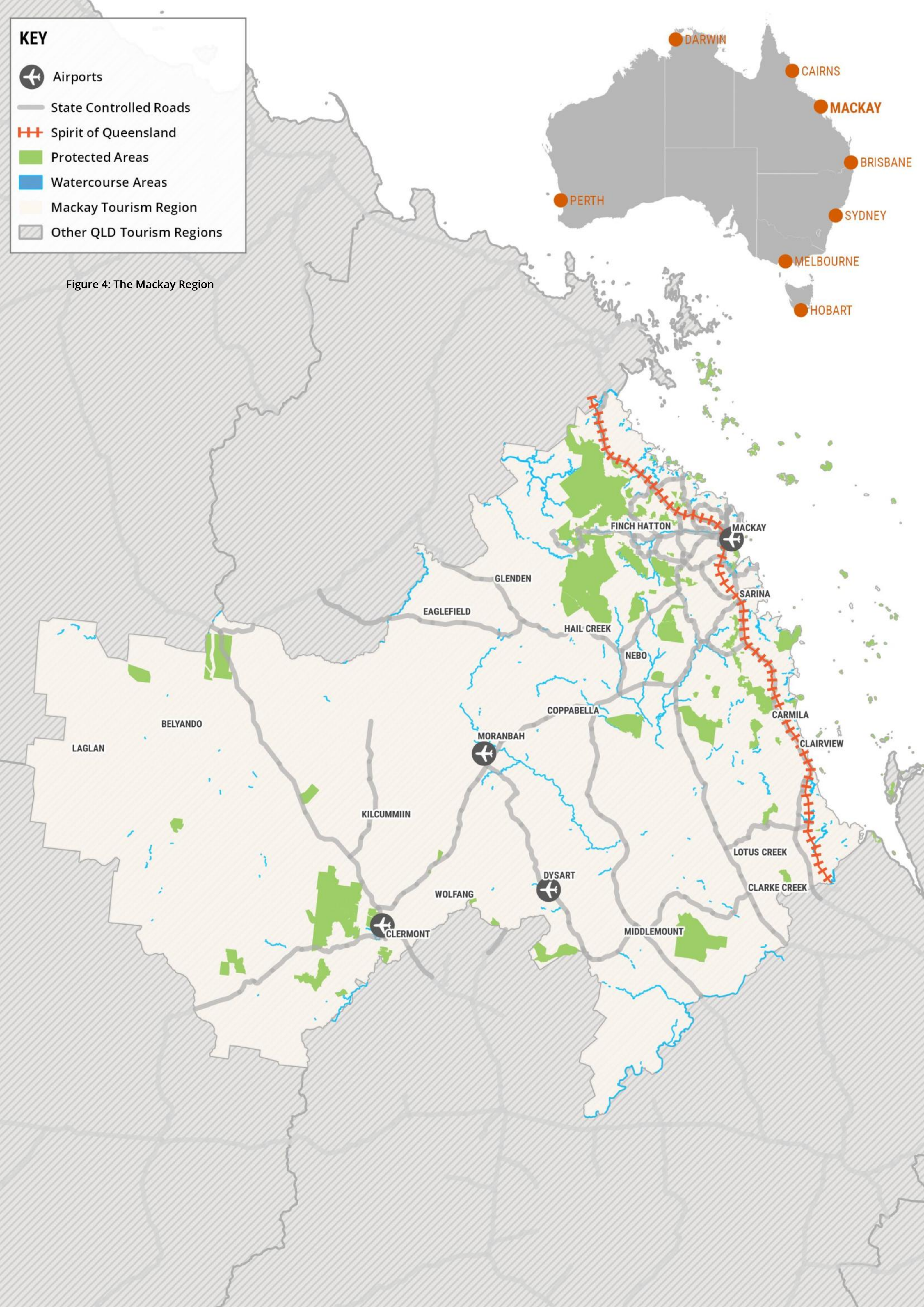


Figure 4: The Mackay Region

1.4. THE REGION'S ECONOMY

1.4.1. Output & employment

Figure 5 provides a breakdown of the region's economic output by sector (including tourism) including for the region as well as a breakdown for each LGA. While this project is focused on the entire Mackay region, demonstrating data on an LGA level is useful because of the different focuses which each has and the different visitors they typically attract.

The data demonstrates that the region's economy is largely dominated by the mining and resource sector, comprising half ($18.4b) of all economic output in 2019. The strength of the mining sector is particularly obvious in Isaac LGA, where the sector contributes just under 83% of total economic output. As of 2018, Isaac LGA hosted 27 operating coal mines, in addition to four other resource operations. The significance of Isaac's mining and resource sector is evident, with it producing 54% of Queensland's total saleable coal[2].

Isaac Regional Council, through its Economic Development Framework (2019-2024), has identified four key industry sectors which are current drivers for the region, being: agribusiness, construction, manufacturing and mining.

Mackay LGA's economic output is more diversified, with mining comprising 16% of output ($2.8b), followed by manufacturing (15%), construction (10.4%) and rental, hiring & real estate services (9.2%). Mackay's economy historically developed off the back of the sugar industry (and still, today, the Mackay-Proserpine region produces nearly one-quarter of Australia's sugar)[3]. Throughout the 1970s-1980s, Mackay received significant mining investment which grew Mackay's capability and capacity in terms of mining equipment, technology and services ... creating a globally significant industry cluster."[4] However, the end of the mining investment boom in 2012 triggered an economic downturn in the local economy. Since then, Mackay has been pursuing a strategy of economic sustainability and diversity.

During the mining investment boom, there was considerable demand/pressure placed across all local infrastructure, particularly residential housing and short-stay accommodation. As a result, since 2011, 4,000 residential dwellings have been added and numerous hotels have been built. The contraction of mining investment has placed Mackay in a current position with surplus accommodation and the opportunity to leverage off more traditional tourism sectors to better utilise this spare capacity.

Across the region, the tourism sector[5] represents just 2% of total output ($734.2m). This is lower than the Queensland state average of 3%. In Mackay, the sector ranks 12th in terms of output and in Isaac it ranks 8th.

Tourism is not identified as a separate industry sector in the National Accounts data, instead, tourism is an amalgam of activities across various industry sectors such as retail, accommodation, cafes & restaurants, and cultural & recreational services. The tourism Module in both Council's Remplan reports estimate the total value of tourism for the local economy.

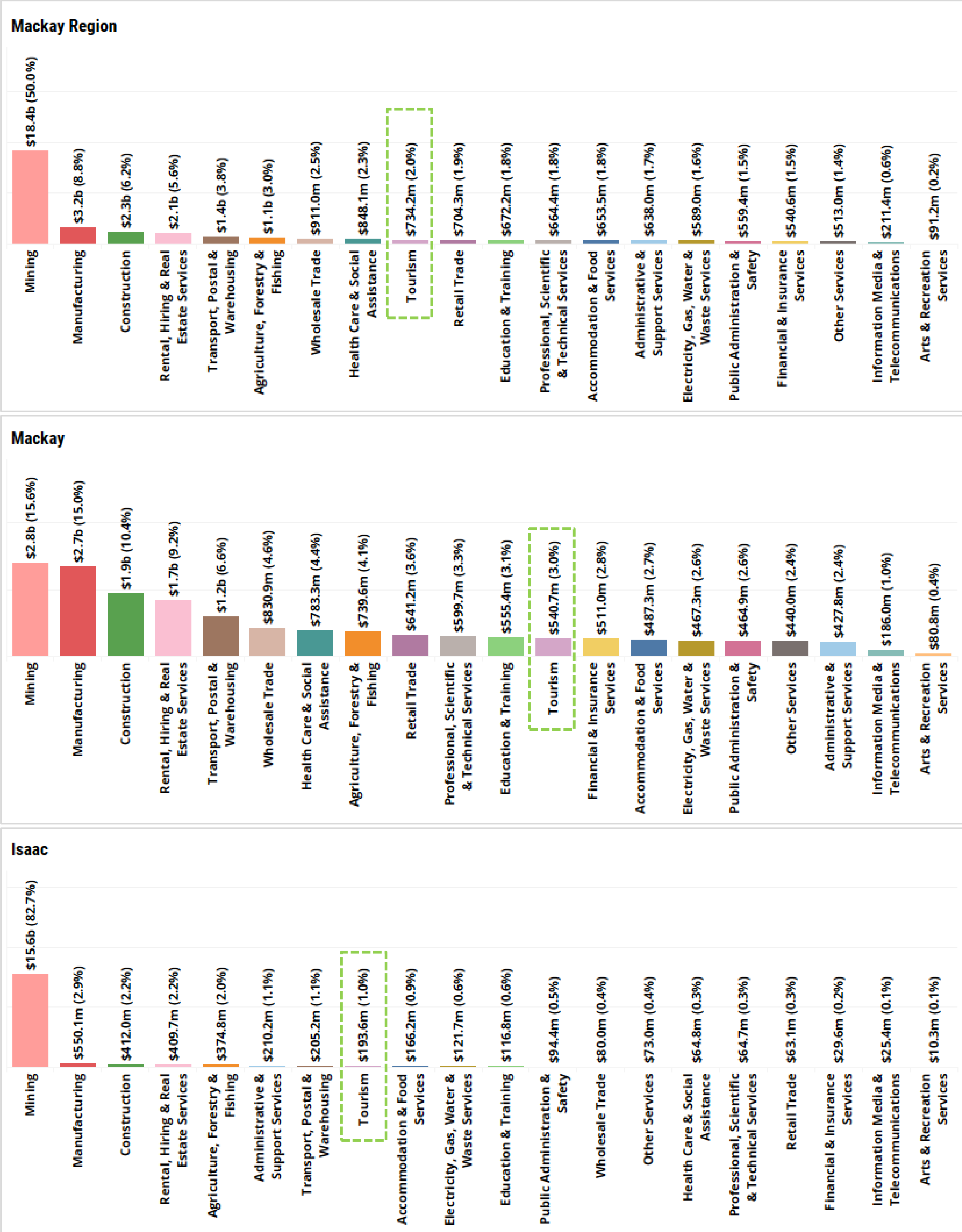
Figure 6 demonstrates employment by sector in the region and in both LGAs. Across the region, the mining sector is the largest employer, accounting for just over 21% of jobs (15,703 positions), followed by health care & social assistance (9%). While for Mackay, tourism employment ranks 8th, in Isaac, the sector is the 3rd largest employer, accounting for just over 4% of jobs.

While the tourism sector across the region is relatively small (in terms of output and employment), significant opportunities exist throughout the region to grow its economic contribution and value. These include a range of product and infrastructure development opportunities to grow the profile of the region and diversify the current visitor market focus.

2 https://www.isaac.qld.gov.au/regional-overview/regional-overview-1/1
3 Mackay Region Economic Development Strategy 2020-2025
4 Mackay Region Economic Development Strategy 2020-2025, page 8.

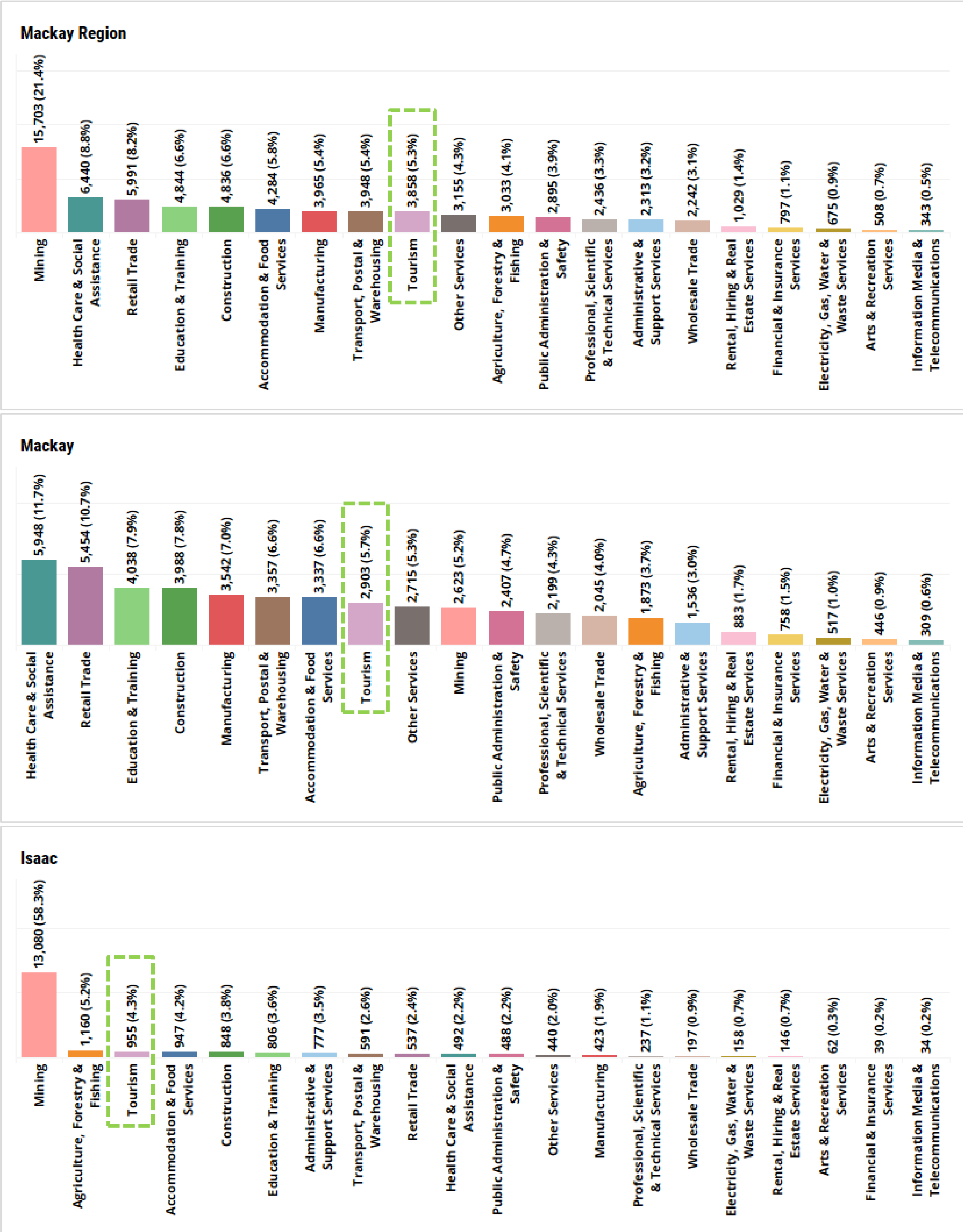
5 With respect to tourism, it is important to note that it is not its own dedicated economic sector. This is because it is an amalgam of several economic sectors. To estimate tourism's contribution, the ABS (via Tourism Satellite Accounts) apply a variety of tourism intensity ratios to each economic sector.

Figure 5: Economic output by LGA (2019)[6]



[6] Mackay and Isaac REMPLAN data

Figure 6: Jobs by LGA (2019)[7]



[7] Mackay and Isaac REMPLAN data

1.4.2. Income

In Isaac LGA in particular, average weekly incomes[8] are far higher than the Queensland average:

- 54% of workers in the LGA earn more than $2,000 per week and 21% earn $3,000 or more; and
- compared with a Queensland state-wide figure where 11.7% earn more than $2,000 per week and 4% earn $3,000 or more.

In Mackay, average weekly incomes are slightly lower than the state-wide figure, with 11.5% earning $2,000 or more per week and 3.2% earning $3,000 or more.

The higher weekly incomes earned in Isaac LGA particularly are attributed to the mining and resource sector. The potential exists to capitalise on this through new tourism product development and packaging targeted at this higher spending market.

1.5. ANALYSIS OF VISITOR TRENDS

1.5.1. Why visitation data is needed

To identify investment opportunities, there is a need to understand the size of the visitor economy, where visitors are going, the types of visitors coming and their reason for coming.

A key question asked by investors and developers in the tourism sector is what tourism data is available and how robust it is.

This section provides a detailed breakdown of visitation data to the region and, as explained later on, provides this based on three-year averages to increase the robustness and quality of the data.

1.5.2. How visitation data has been compiled

Visitor data has been compiled for the Mackay Region using the National and International Visitor Survey (NVS and IVS) data published by Tourism Research Australia (TRA). The NVS and IVS provide visitation data based on 'Statistical Area 2' (SA2) boundaries. Every LGA in Australia is made up of one or more SA2s. The SA2s included in the region are:

- Isaac LGA: Broadsound – Nebo, Moranbah, and Clermont; and
- Mackay LGA: Andergrove – Beaconsfield, East Mackay, Eimeo - Rural View, Eungella Hinterland, Mackay, Mackay Harbour, Mount Pleasant – Glenella, North Mackay, Ooralea - Bakers Creek, Pioneer Valley, Sarina, Seaforth - Calen, Shoal Point - Bucasia, Slade Point, South Mackay, Walkerston – Eton and West Mackay

As per the methodology applied by TRA for LGAs and regions[9], visitation data is averaged over three-year periods, rather than being provided on an annual basis, as this minimises the impact of variability in estimates from year to year and provides more robust estimates. The periods assessed in this Business Case include:

- September 2011 to September 2013, referred to as 2013;
- September 2014 to September 2016, referred to as 2016; and
- September 2017 to September 2019, referred to as 2019.

September YE data (unless otherwise specified) has been applied as this is the most recent iteration of data released by TRA via the NVS and IVS.

Additionally, this section breaks data down, where possible, on an LGA basis. This has been done to acknowledge that the Mackay region is diverse and attract different segments of the visitor market.

1.5.3. Visits to The Mackay Region

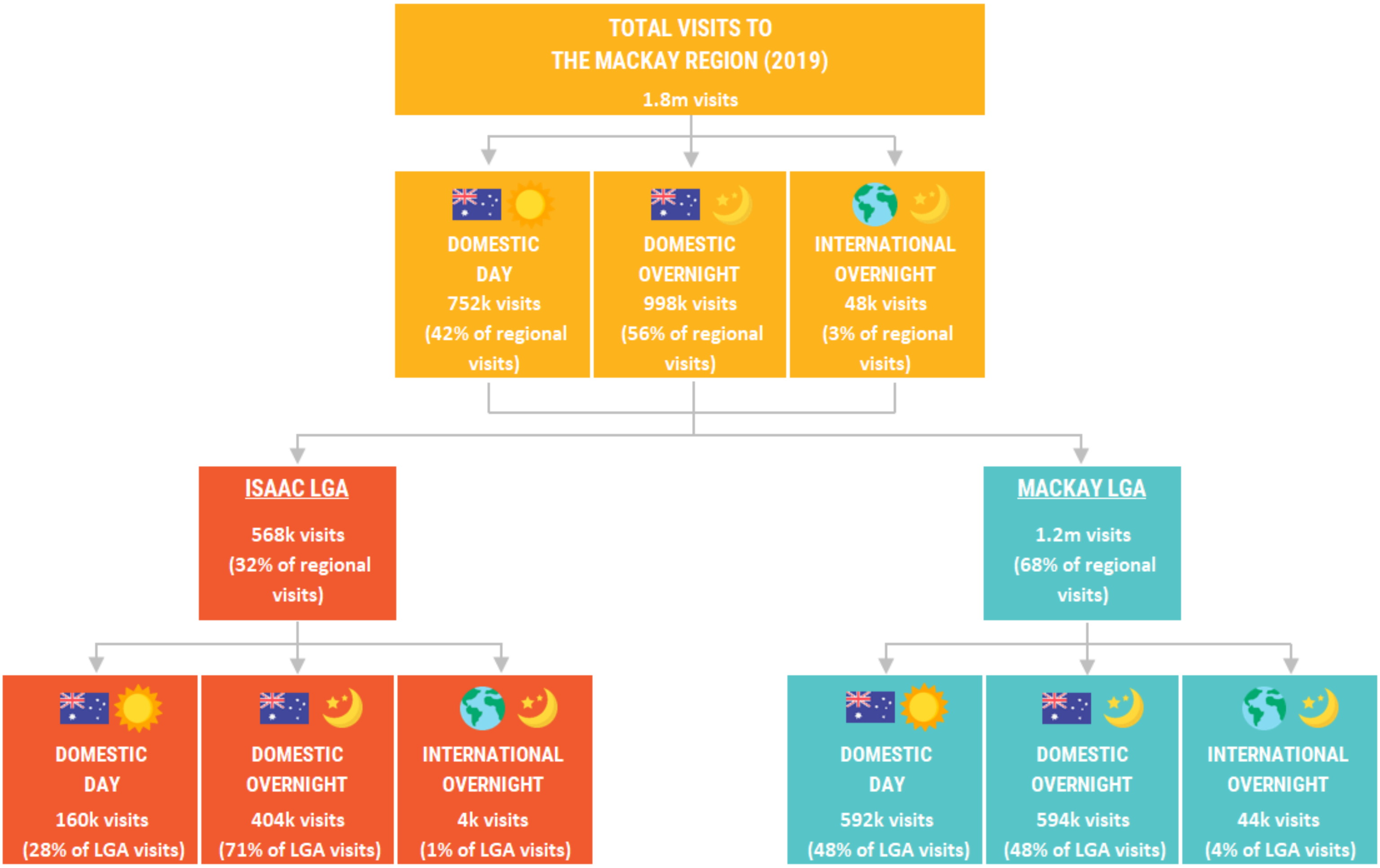
Figure 7 provides a summary of visits to the Mackay region, as well as to Mackay LGA and Isaac LGA in 2019. It demonstrates the following.

- In 2019, the region received an estimated 1.8m visits. Most of these visits (68%) were to Mackay LGA, with the remainder (32%) being to Isaac LGA.
- Overall, the major visitor market for the region is the domestic overnight market, comprising 56% of all travel in the region.
- Isaac LGA attracts a stronger proportion of domestic overnight travel (71% of visitors to the LGA were domestic overnight travellers), while travel to Mackay LGA is more evenly split between domestic day and domestic overnight travel (comprising 48% each).
- Mackay LGA generates ten times the number of international visits that Isaac LGA receives.

[8] Mackay and Isaac REMPLAN data

[9] https://www.tra.gov.au/research/regional-tourism/local-government-area-profiles/local-government-area-profiles

Figure 7: Visits to The Mackay Region (2019)[10]



[10] NVS and IVS, Tourism Research Australia. Data is based on a 3-year average 2017-19

1.5.4. Change in visits

Figure 8 summarises visits to The Mackay Region between 2013 and 2019 and demonstrates the following.

- Visits to the region have bounced back after experiencing a low of 1.56m visitors in 2016. As of 2019, visits to the region was estimated at 1.80m.
- One of the drivers of the decline in visits between 2013 and 2016 was a large fall in domestic day trip visits, falling from 1m visits to 714k visits. Although domestic overnight visits increased over the same period, the growth was not large enough to counter the decline in domestic day visits.
- Interestingly, however, many regions are facing the opposite problem to Mackay. For these destinations, domestic day trip visitation is growing while overnight visitation is declining. In Mackay, domestic overnight travel has grown by a total of 40% (285k visits) over the period assessed. Most destinations are keen to attract more overnight visitors because of the greater economic benefit able to be generated generally because of increased spend on accommodation, food and beverage, transport etc.
- International travel to the region has remained relatively static, fluctuating between 39.2k visits in 2016 and 47.9k visits in 2019 and which reflects the importance of the domestic market. Anecdotal feedback indicates there has been growth in the international market, particularly those undertaking wildlife viewing experiences. While the IVS has not picked up on this growth, this is likely because:
  - the IVS only records international overnight visitation, rather than day trip visitation (so, if a visitor stays overnight in the Whitsundays but undertakes a day trip to Mackay, for example, they would not be recorded as having visited Mackay); and
  - those visitors completing the IVS could potentially be associating their destination with being the Whitsundays, rather than Mackay, as it is a more well-known destination.

Figure 8: Visits to The Mackay Region (2013, 2016, 2019)[11]

[11] NVS and IVS, Tourism Research Australia. Data is based on a 3-year averages

Figure 9Figure 9 provides the change in visits to Isaac LGA. It demonstrates that total overall visits have been growing, increasing by 127k visits (or 29%). This growth has been led by a strong increase in the domestic overnight market, increasing from 192k visits in 2013 to 404k visits in 2019 – a total increase of 110% (212k visits). Business travel (attributed primarily to the resource and mining sector) to the LGA has driven this strong increase in domestic overnight visits.

Figure 9: Visits to Isaac LGA (2013, 2016, 2019)[12]

[12] NVS and IVS, Tourism Research Australia. Data is based on a 3-year averages

Visitation to Mackay LGA has fluctuated over the period assessed (see Figure 10). Similar to Isaac LGA, this fluctuation has been caused primarily by business travel to the LGA, particularly in the domestic overnight market. With the contraction of mining-based investment in 2013, this is not an unexpected result.

Leisure-based domestic overnight travel to the LGA (i.e. holiday and VFR) has remained relatively static between 2013-2019, totalling 339k visits in 2013 and 319k visits in 2019.

Figure 10: Visits to Mackay LGA (2013, 2016, 2019)[13]

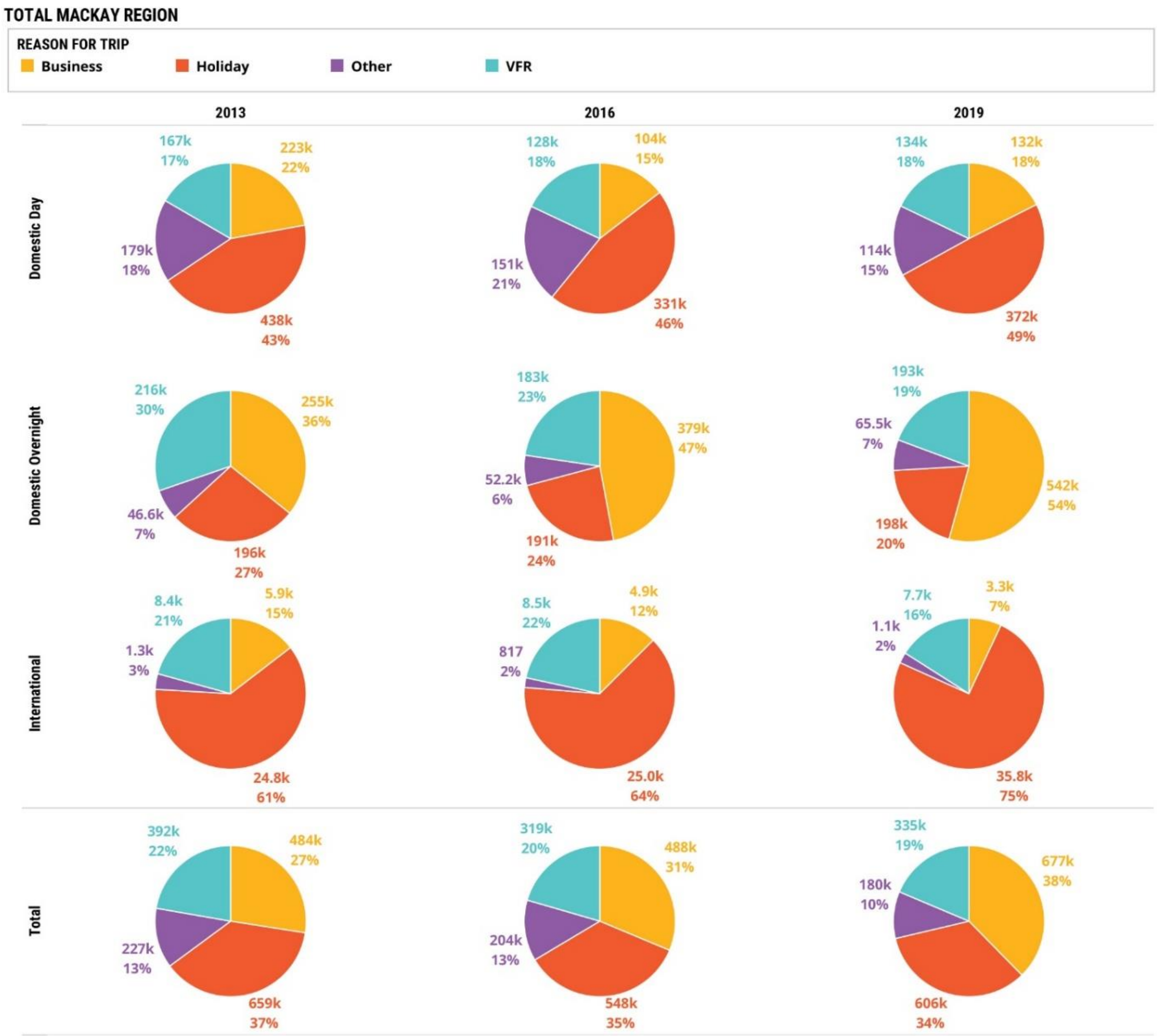
[13] NVS and IVS, Tourism Research Australia. Data is based on a 3-year averages

1.5.5. Visitation by motivation

Figure 11 provides a summary of the motivation of visitation to The Mackay Region over the period 2013-2019. This is followed by a breakdown for Isaac LGA (Figure 12) and Mackay LGA (Figure 13) The data illustrates the following.

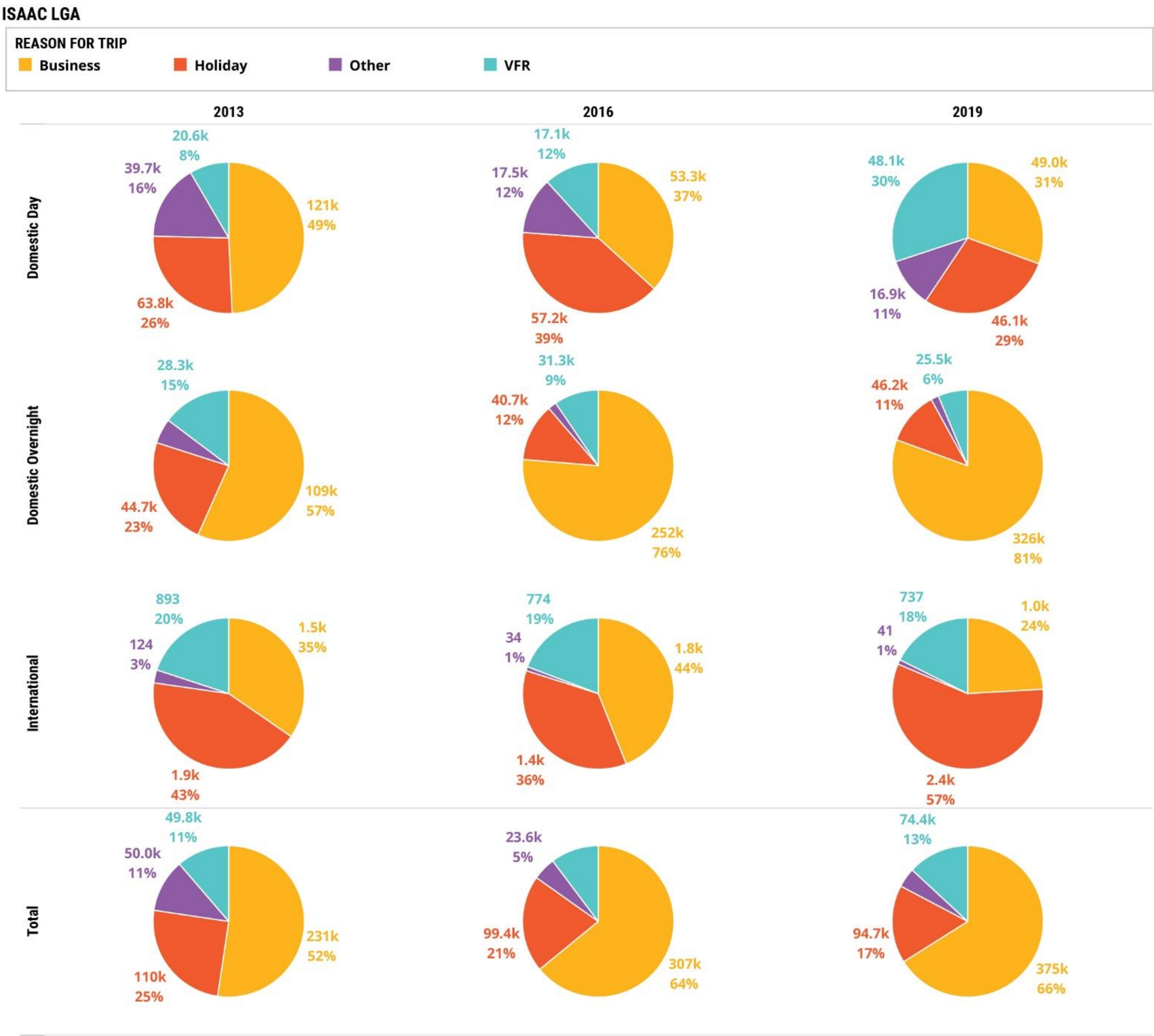
- For domestic day visitors, holidaying is by far the most popular motivation for visiting the region, comprising more than 40% of total visitation across the period assessed.
- Business visitation is a far stronger motivation for domestic overnight visitation. With Mackay being the major business centre between Townsville and Rockhampton, and Isaac having a large mining/resource sector this is not surprising.
- Over the period assessed, business visitation by domestic overnight visitors has grown from comprising 36% of domestic overnight visitation to 54%.
- Holiday visitation is the primary motivation for international visitors to the region, comprising 75% of international visitation in 2019.
- Looking at motivation for Isaac LGA only travel demonstrates the significant size of business travel, comprising 66% of all travel to the region in 2019, up from 52% in 2013.
- Mackay LGA, on the other hand, has a more diversified visitor market and a greater proportion of holiday travel. In 2019, business travel comprised 25% of travel to the LGA, while holiday visitation totalled almost double this (42%).
- Mackay's share of holiday visitation has remained static from 2013-2019, however, there have been fluctuations in the business market, in particular, which has likely been driven by the consolidation of mining/resource investment within the LGA.

Figure 11: Visitation by Motivation to The Mackay Region (2013, 2016, 2019)[14]



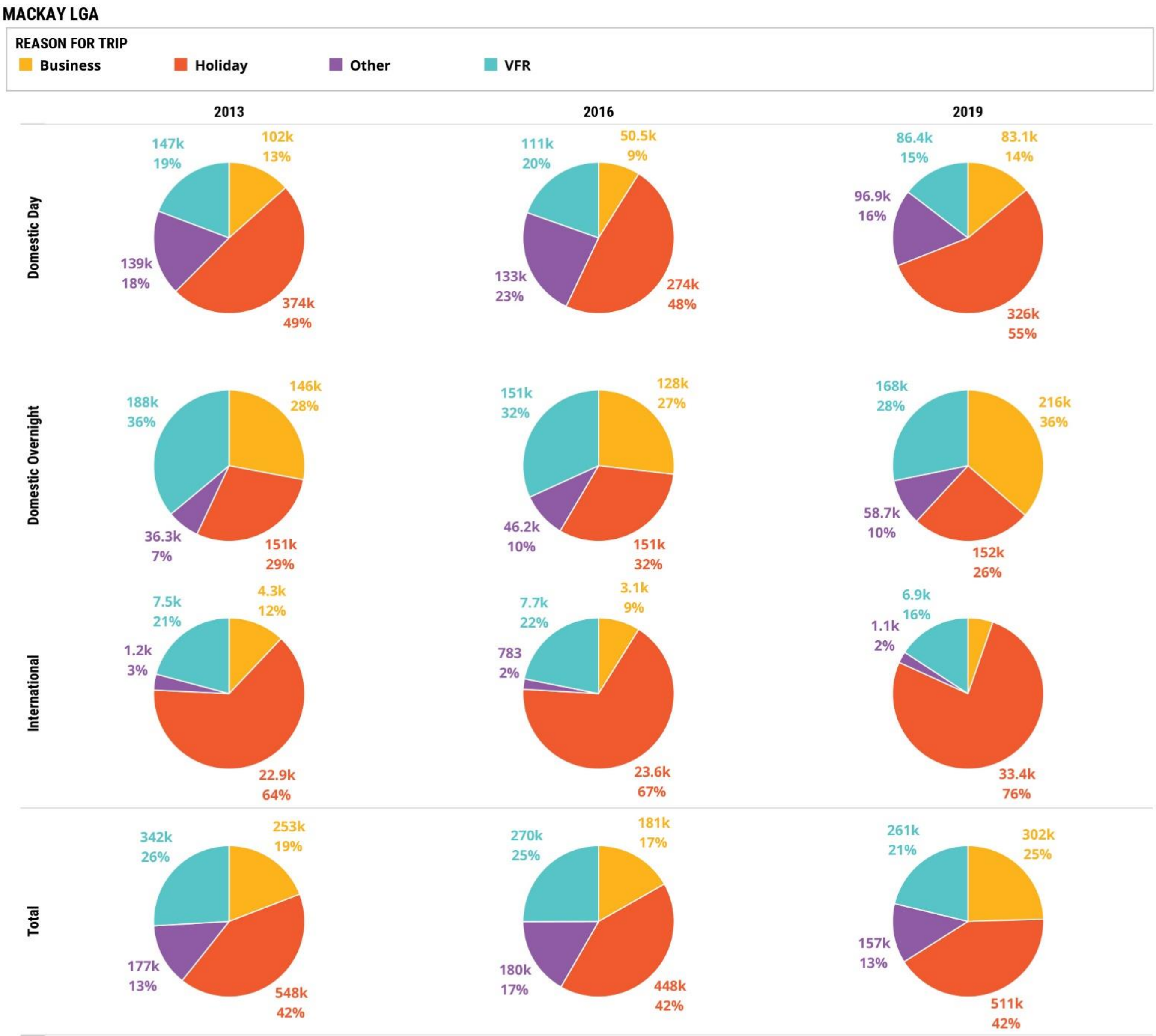
[14] NVS and IVS, Tourism Research Australia. Data is based on a 3-year averages

Figure 12: Visitation by Motivation to Isaac LGA (2013, 2016, 2019)[15]



[15] NVS and IVS, Tourism Research Australia. Data is based on a 3-year averages

Figure 13: Visitation by Motivation to Mackay LGA (2013, 2016, 2019)[16]



[16] NVS and IVS, Tourism Research Australia. Data is based on a 3-year averages

1.5.6. Visitation by origin

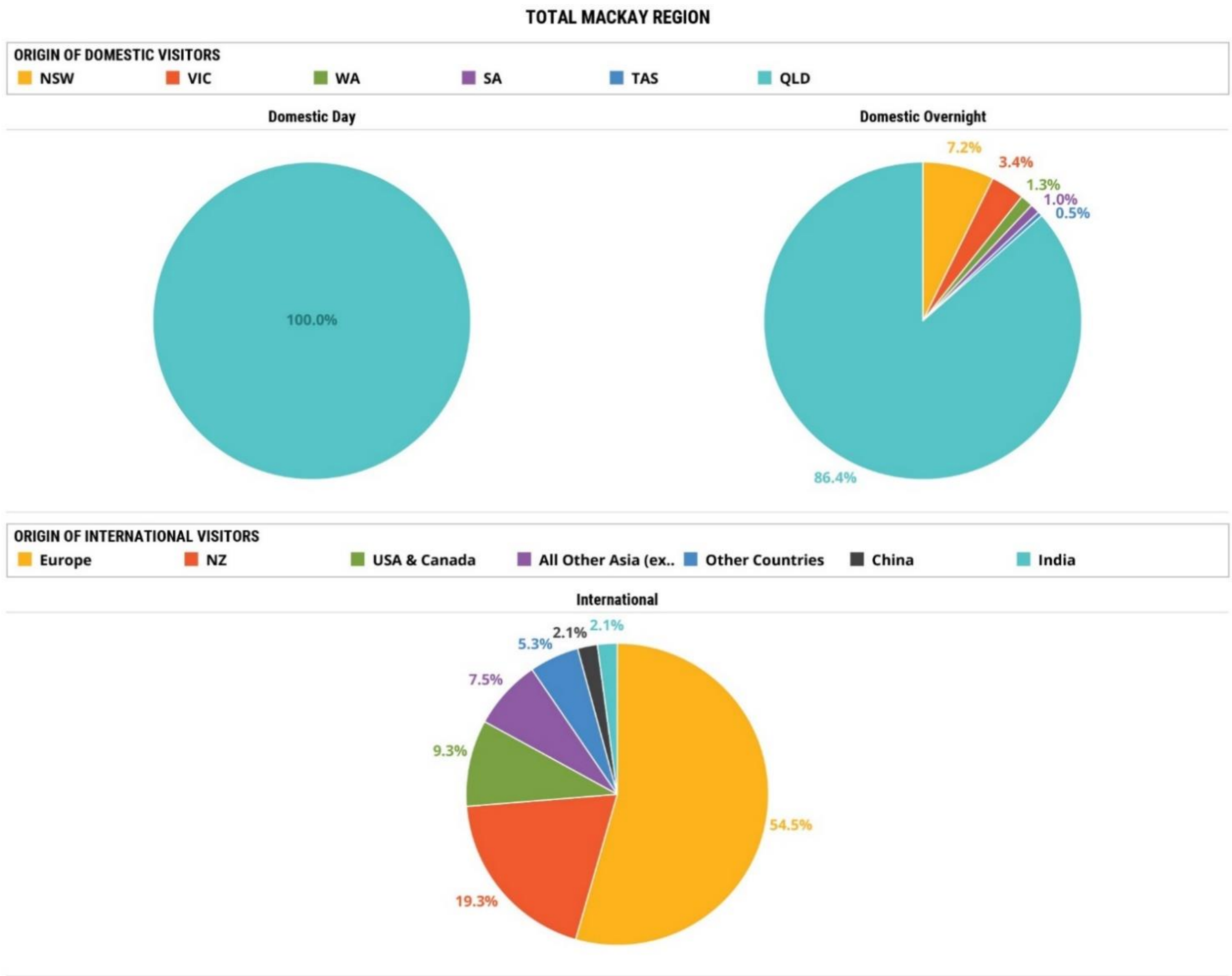
Figure 14 summarises visitation to The Mackay Region by origin. This is followed by a breakdown for Isaac LGA (Figure 15) and Mackay LGA (Figure 16). The data illustrates the following.

- As expected, all domestic day visitation is generated by an intrastate market (i.e. Queensland residents) from a drive catchment of approximately 1-3 hours' drive time from main centres in the region.
- Queensland is also the major visitor market for domestic overnight visitation to the region, demonstrating, that, currently, the region is very much an intrastate destination.
- After QLD, NSW is the next largest domestic overnight market, comprising just over 7% of domestic overnight travel to the region.
- For international visitation, more than half (55%) originate from Europe. New Zealand is the second-largest market (9%), followed by the USA and Canada (9%). There is limited visitation from Asian/eastern markets.
- The breakdown for visitor origin by LGA does not show any major variations with the regional data; QLD is, by far, the largest visitor day and overnight market for both LGAs.

Considering current events surrounding the COVID-19 pandemic, the region's position as primarily an intrastate destination should be viewed as positive. Current projections for tourism in Australia anticipate intrastate travel to resume the quickest, followed by interstate travel and, eventually, international travel (in the medium term). A Trans-Tasman market from New Zealand, however, might be able to be activated sooner if inter-government policies can align on protecting borders from entry by other markets.

There are some destinations which have historically had a very strong international visitor focus (such as Noosa, Byron Bay and Cairns/Port Douglas) which are likely experiencing far greater impacts from COVID-19 and will need to reinvigorate their focus on the domestic market to sustain their visitor economies.

Figure 14: Visitation by Origin to The Mackay Region (2019)[17]



[17] NVS and IVS, Tourism Research Australia. Data is based on a 3-year average 2017-19

Figure 15: Visitation by Origin to Isaac LGA (2019)[18]

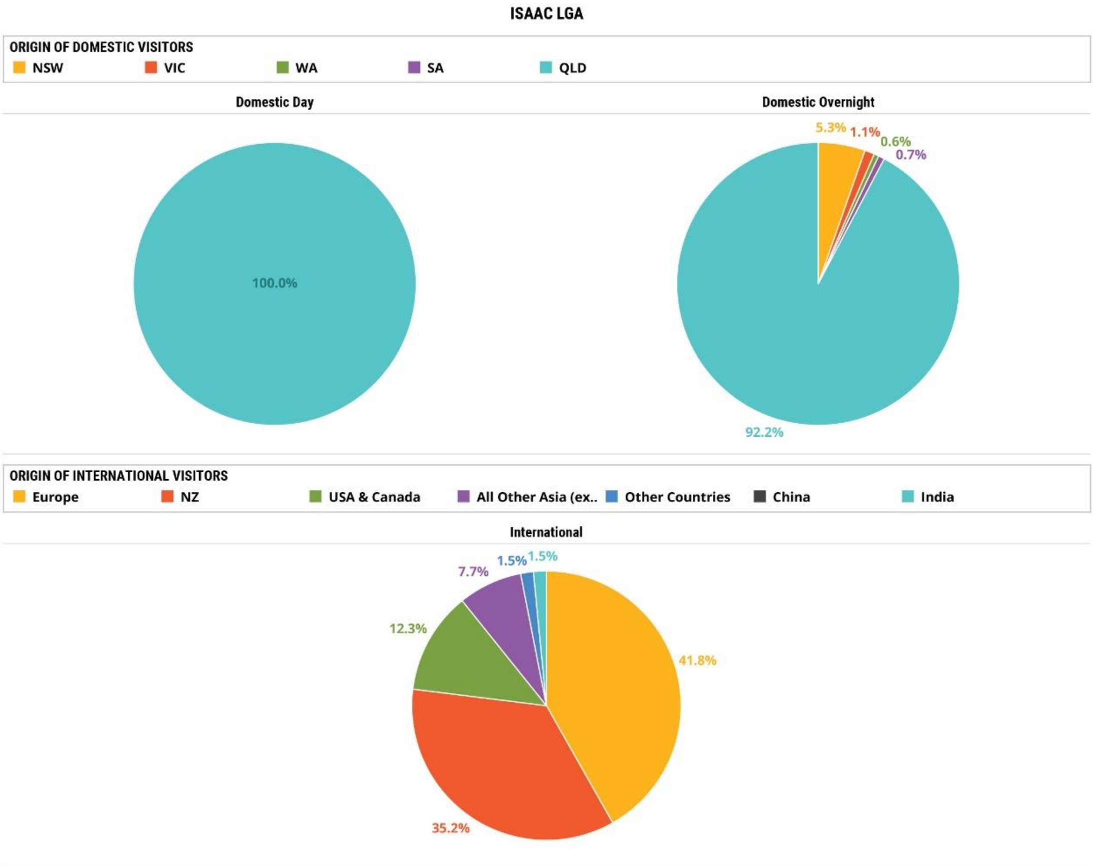
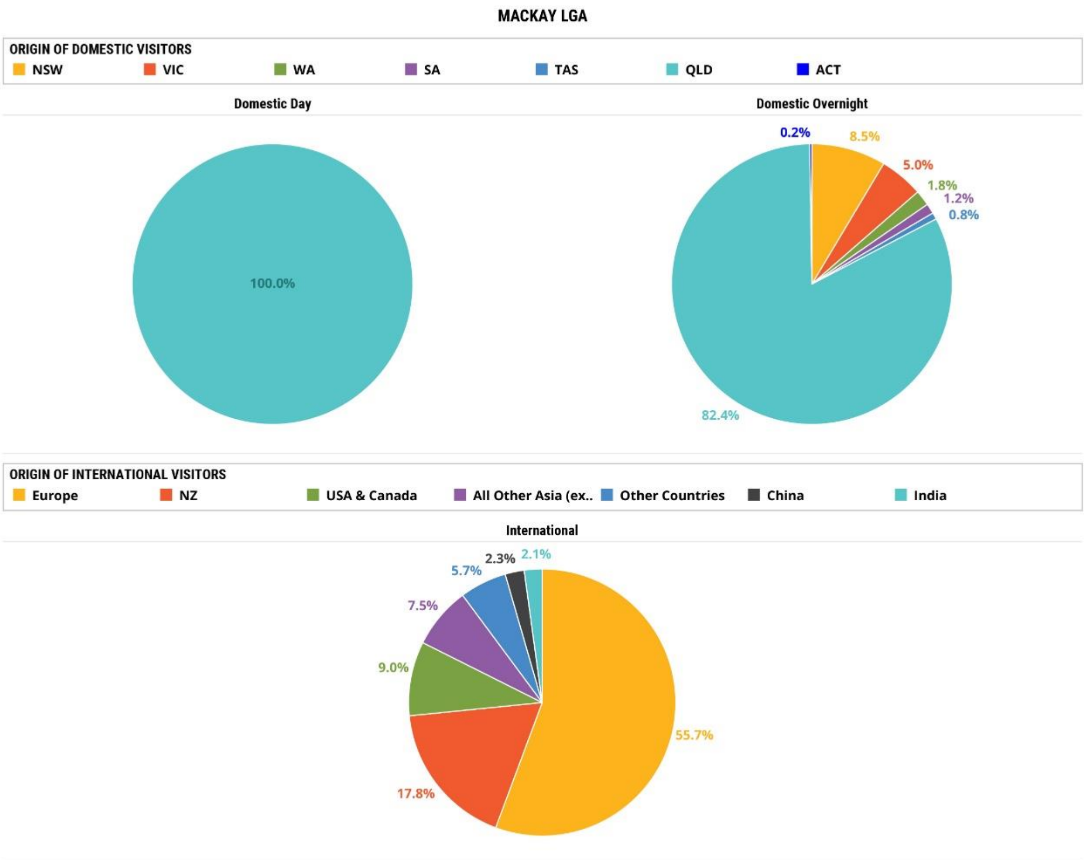


Figure 16: Visitation by Origin to Mackay LGA (2019)[19]



[18] NVS and IVS, Tourism Research Australia. Data is based on a 3-year average 2017-19
[19] NVS and IVS, Tourism Research Australia. Data is based on a 3-year average 2017-19

1.5.7. Sub-regional visitation

As explained previously, visitation data is provided by TRA on SA2 boundaries. It is useful to view the data at a more granular level as it shows more popular destinations within the region. SA2s have been grouped into logical sub-regional areas. They are illustrated in Figure 17 below.

Figure 18 which follows demonstrates total visitation to each of these sub-regional areas in 2019 and shows the following:

- Half of the total regional visitation was to the Central Mackay sub-region, receiving 904k visitors.
- The next most visited sub-region was Broadsound – Nebo which comprised 14% of visitation, closely follows by Moranbah at 13%.
- The distribution of visitation throughout the region is impacted by the level of tourism product and infrastructure supply: that is, where there is more accommodation, food and beverage, shops and tourist attractions, there is likely to be stronger levels of visitation.

Figure 17: Sub-regional areas

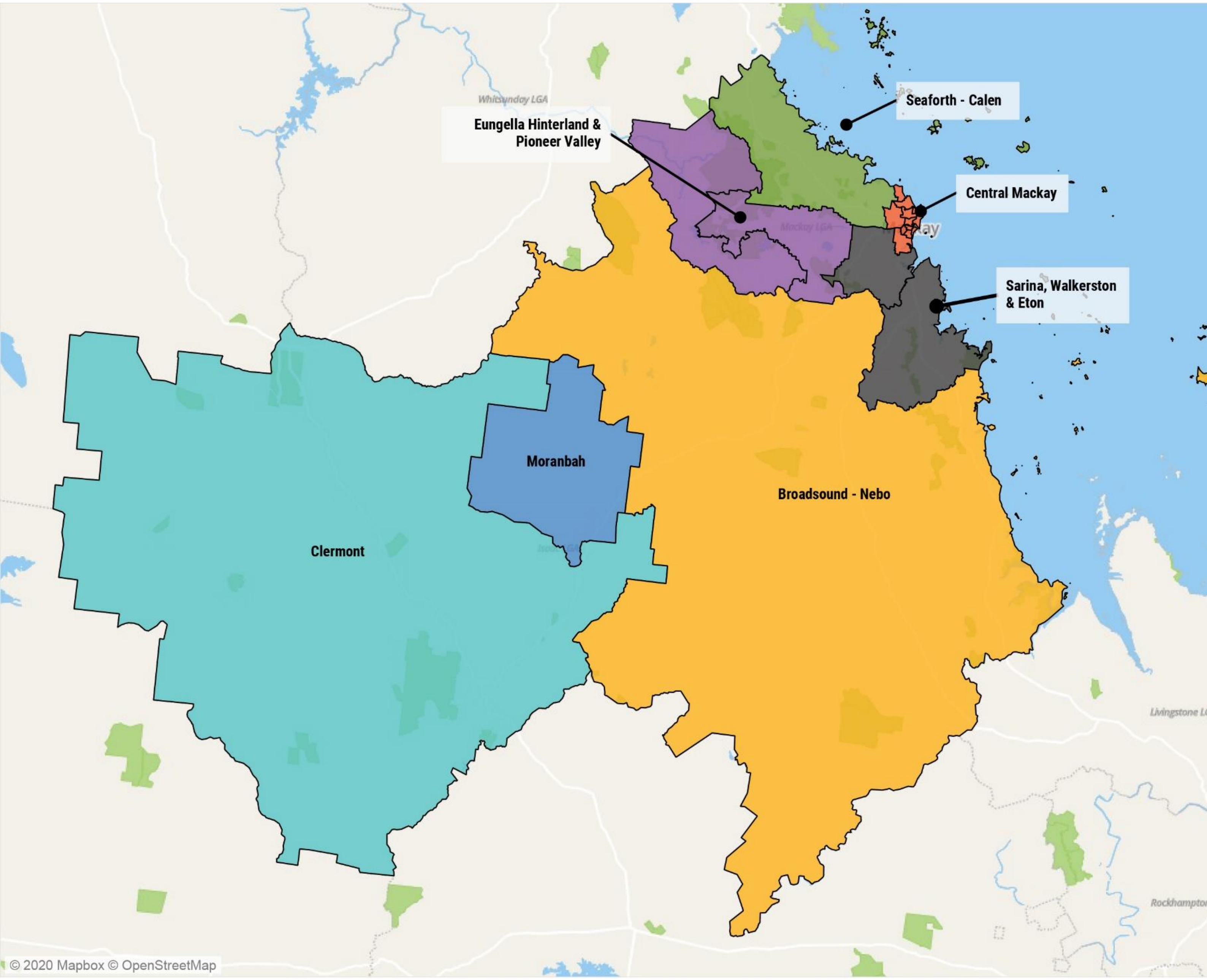
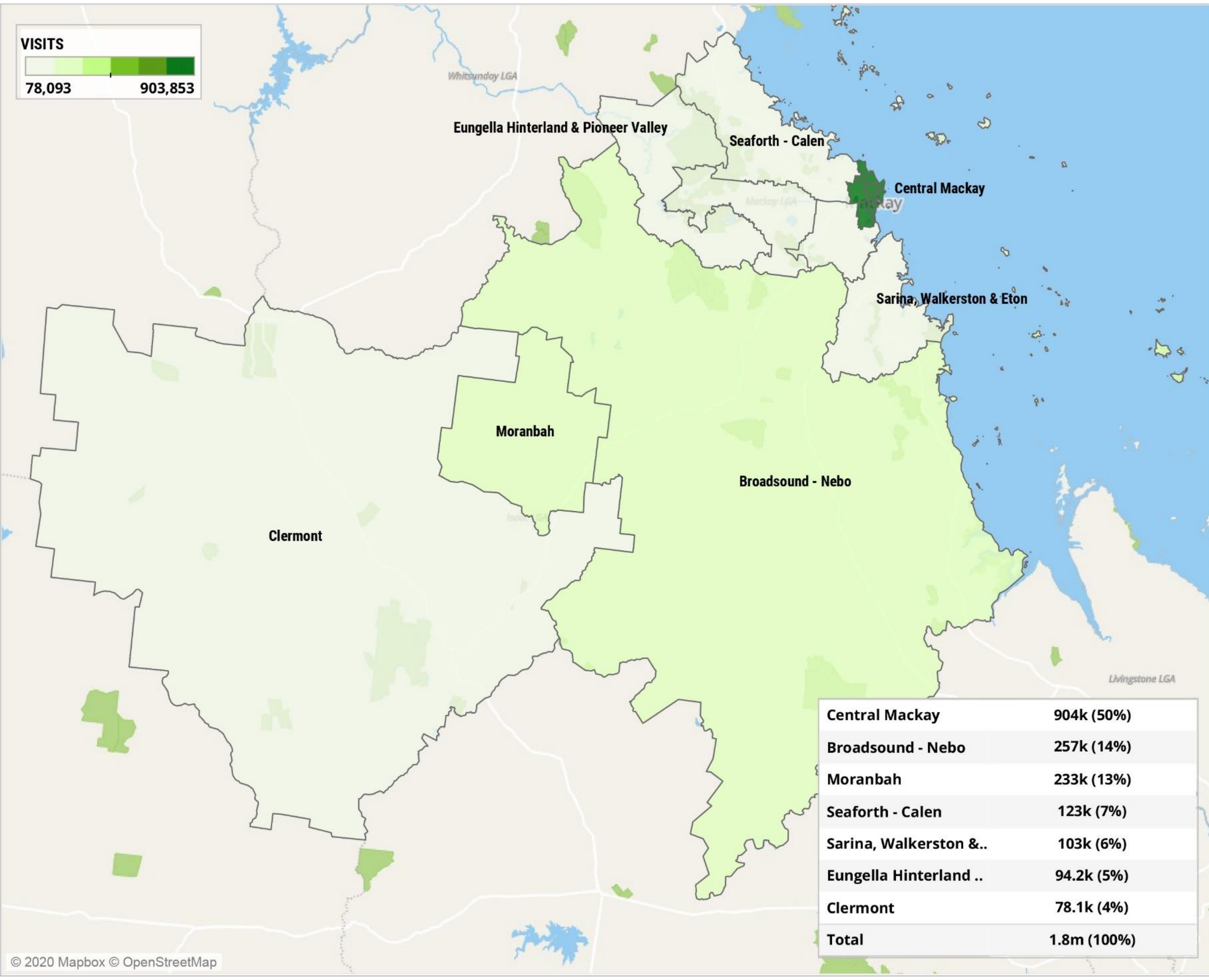


Figure 18: Sub-regional Visitation (2019)[20]



Central Mackay	904k (50%)
Broadsound - Nebo	257k (14%)
Moranbah	233k (13%)
Seaforth - Calen	123k (7%)
Sarina, Walkerston &..	103k (6%)
Eungella Hinterland ..	94.2k (5%)
Clermont	78.1k (4%)
Total	1.8m (100%)

[20] NVS and IVS, Tourism Research Australia. Data is based on a 3-year average 2017-19

1.5.8. Visitor Spend

When reading this section, it is important to note that the reason regional visitor spend noted in this report is lower than regional visitor spend in TEQ's regional profile for Mackay is because of the methodology used to calculate spend. When compiling the regional profiles, TEQ includes regional expenditure which includes spend by residents of the region on the way to somewhere else. The local government area profiles, however, only include destination expenditure (i.e. spend by visitors only and not by locals). So, while the Mackay regional profile states a total regional spend of $678.2m, this includes spend by locals who are travelling out of the region (and, for example, may fill up with petrol on their way out).

For this report, Stafford considers that it is more robust to only assess destination expenditure as this is a more accurate reflection of spend by "true" visitors to the region, rather than including local spend by residents.

Figure 19 on the following page provides a breakdown of visitor spend in the region. In 2019, visitor spend across the region totalled $456m. Of this, 74% was generated by domestic overnight visitors, 22% by domestic day trippers and 5% by international overnight visitors.

The data demonstrates the importance of the domestic overnight visitor market, both in terms of total spend (comprising 74% of all visitor spend in the region) and spend per trip and spend per night.

- While domestic day trippers only contributed an estimated $113 per trip in Isaac and $136 per trip in Mackay, domestic overnight visitors contributed $256 per trip in Isaac and $391 per trip in Mackay – more than double the spend of domestic day trippers per trip.
- Although international spend per trip is higher than domestic overnight spend per trip, this is because of the migrant worker populations who stay in the region far longer. Looking at the spend per night, domestic overnight visitors spend far more than international visitors in both LGAs.

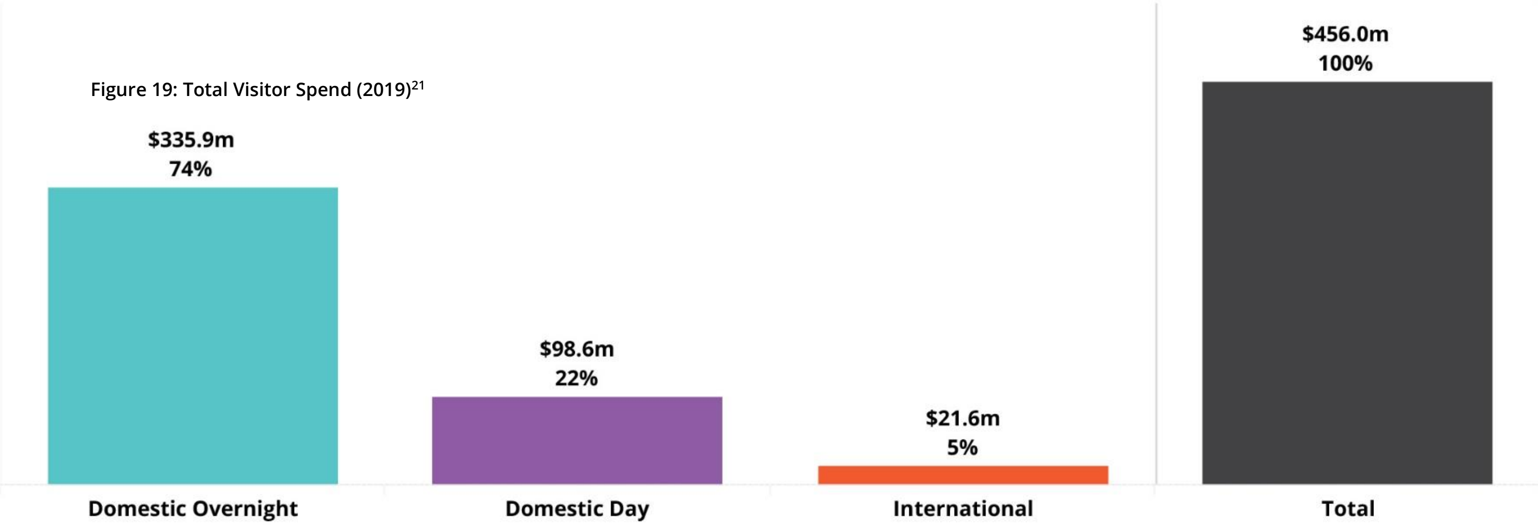
Mackay received the bulk of visitor spend, with 73% of all spend throughout the region occurring in the Mackay LGA. Reasons for this include: the greater accommodation offer which Mackay has, increased food and beverage offerings as well as the stronger retail offer.

To grow visitor yield across the region, there is a need to:

- introduce new (and enhance existing) paid experiences to shift the focus from free product to more commissionable product;
- develop new, higher-quality accommodation options throughout the LGA which are currently lacking;
- investigate ways to convert existing free experiences into commissionable experiences;
- introduce a higher-quality food and beverage offering to not only encourage visitors to eat out more but also for locals;
- introduced packaged product including, where possible, packaging with surrounding regions;
- to introduce more special interest and niche product such as fishing lodges, wellness and spa facilities, glamping etc.

TOTAL VISITOR SPEND IN MACKAY REGION

Figure 19: Total Visitor Spend (2019)[21]

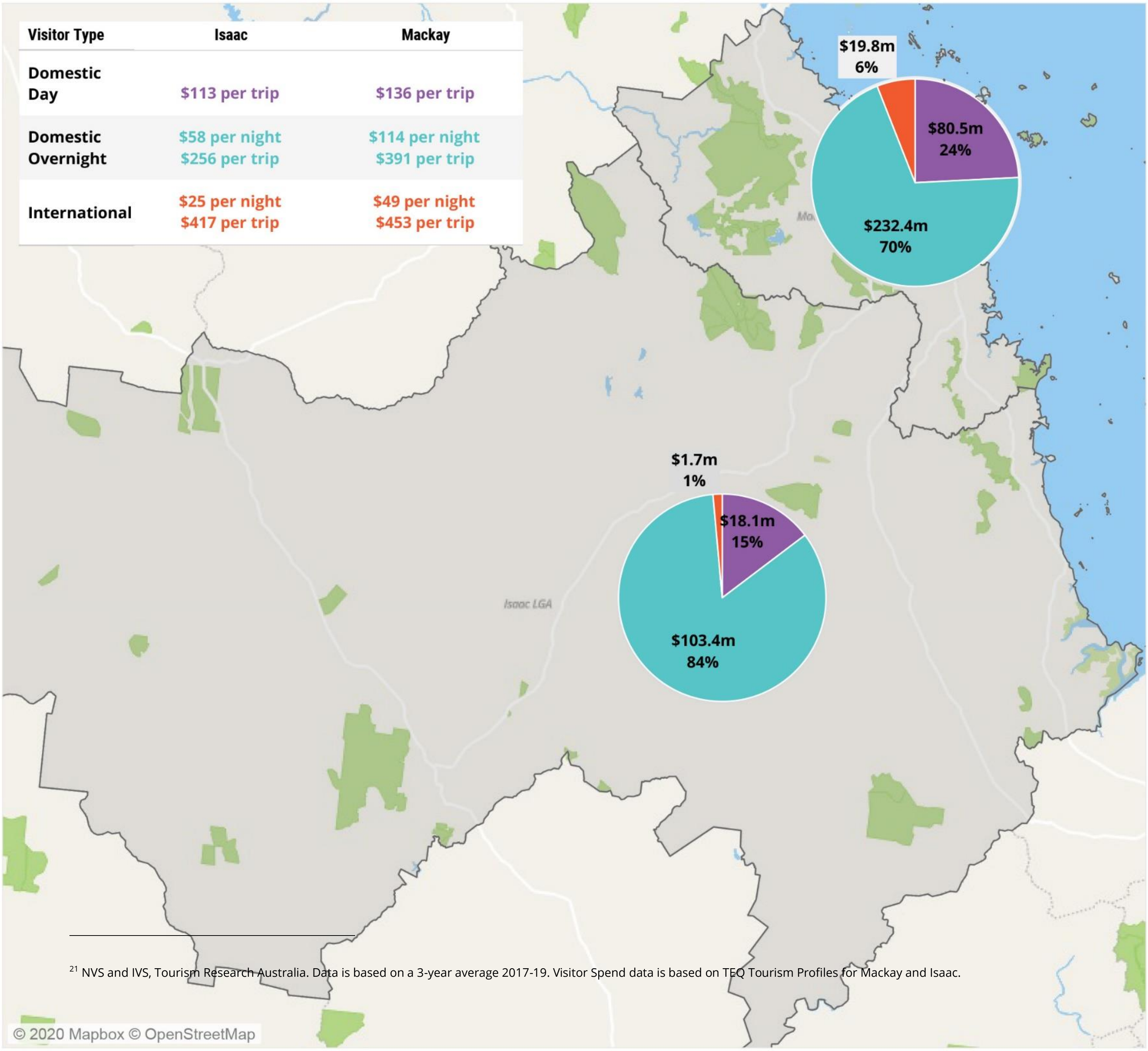


VISITOR TYPE

Domestic Day | Domestic Overnight | International

VISITOR SPEND BY LGA

Visitor Type	Isaac	Mackay
Domestic Day	$113 per trip	$136 per trip
Domestic Overnight	$58 per night $256 per trip	$114 per night $391 per trip
International	$25 per night $417 per trip	$49 per night $453 per trip



[21] NVS and IVS, Tourism Research Australia. Data is based on a 3-year average 2017-19. Visitor Spend data is based on TEQ Tourism Profiles for Mackay and Isaac.

1.6. VISITATION & SPEND FORECASTS

1.6.1. The Implications of COVID-19

The Coronavirus Disease (COVID-19) pandemic will result in significant changes to visitation levels not only for Mackay but for Australia. At the time of writing this report (April 2020), Australia has implemented Stage 3 lockdown measures. As a result, all international travel to Australia is blocked and Australian residents are being told to remain at home and to only leave to access essential services (such as medicine and food).

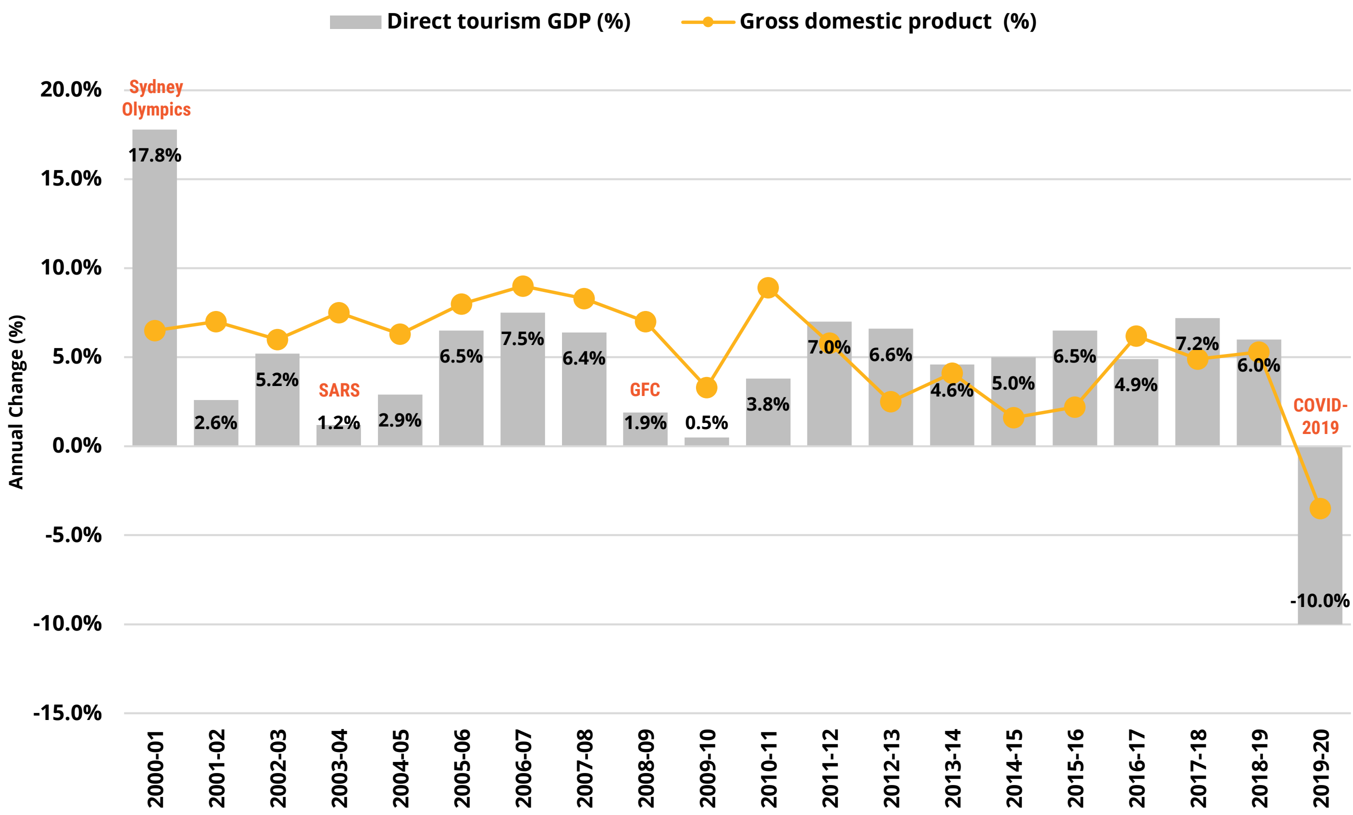
Without a timeframe for when COVID-19 measures may be relaxed, it is difficult to forecast future visitation with a high degree of accuracy. However, it is anticipated that:

- for 2020, international visitation is likely to drop off completely (particularly from April on when lockdown measures came into effect);
- domestic visitation (particularly overnight visitation) is also likely to drop off as a result of lockdown measures; and
- while the domestic intrastate market may be quicker to rebound once lockdown measures are reduced, it may take a longer period to restimulate interstate and international visitor demand.

While the previous sections on visitor demand focused on historic visitation (i.e. on the years leading up to and including 2019, before COVID-19) this section is focused on projecting visitor data to understand potential demand for the region going forward. The implications of COVID-19 have been factored into the demand forecasts included.

Figure 20 includes modelling undertaken for Tourism Transport Forum (the national peak industry body for the tourism and transport sectors) at a national level on the potential impact of COVID-19 on tourism growth levels through the percentage change year-on-year for both direct tourism GDP in Australia and compared to the percentage change each year for total Australian GDP overall. It shows the major impact of COVID-19 on tourism growth compared with other major historical events such as SARS and the GFC.

Figure 20: The change in tourism growth (2001/01 to 2019/20)[22]



[22] Estimated Impact of Coronavirus On The Australian Visitor Economy – March 2020, Tourism Transport Forum. Modelling undertaken by Stafford Strategy.

1.6.2. Mackay total visits projections

Total visits projected for Mackay is summarised in Figure 21.

It is important to note that future externalities, such as major weather and economic events, have not been factored into the growth projections.

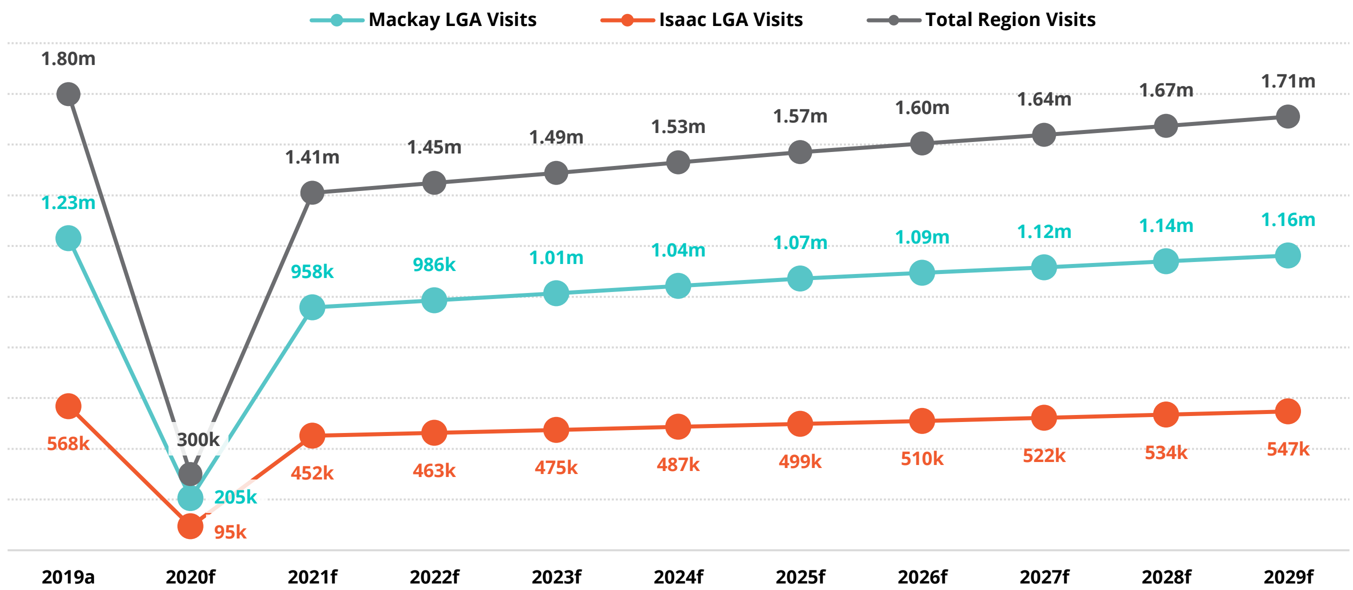
The sharp drop in visitation in 2020 is forecast as a result of COVID-19 where visitation by both domestic and international visitors to the region and for each LGA is anticipated to decline significantly.

The forecasts have been based on the following assumptions.

- In 2020 it is anticipated that visitation by all markets is likely to decline by potentially 80%. To model this, the equivalent of two months of 2019 visitation has been modelled. This allows for visitation that would have occurred before COVID-19 restrictions and the potential uplift in visitation anticipated towards the end of 2020 (when it is forecast that major COVID-19 restrictions could potentially be eased).
- For international visitors, it is projected that it will take some time for visitation levels to reach pre-COVID-19 levels. It is projected that it will potentially take until 2025 for international visitation to return to pre-COVID-19 levels being 2019 visitation data.
- The only international market which could possibly be activated in a faster timeframe is from New Zealand. Dependent on border restrictions by both Australia and New Zealand, this might free up a start of the recommencement of air services in 2021 though it is uncertain whether inbound hubs such as the Gold Coast will get activated this quickly, compared to Brisbane, Melbourne and Sydney which are more likely to activate first due to a mix of business and leisure travel.
- For the domestic markets, it is projected that by 2021, visitation levels could be approximately 80% of 2019 visitation. Post-2021, visits have been increased by conservative compound annual growth rates (CAGR).

Based on these projections, it is anticipated that visitation to the region may struggle to reach 2019 levels until 2029 at the earliest, though these projections need to be seen as conservative.

Figure 21: Total visits projections (2020 – 2029)



1.6.3. Projections by visitor type

Figure 22 - Figure 24 provides visitor projections for the whole region based on visitor type and separately for Mackay LGA and Isaac LGA. They demonstrate the differing rebound periods anticipated post-2020.

As indicated previously, while it is projected that the domestic markets will rebound within a quicker timeframe, it will likely take some time for the international market to build back up to pre-2020 levels.

It is also important to note that these projections are based on the current level of accommodation, attractions, tours and experiences on offer in the region in 2020. A major push for investment into new experiences, niche market accommodation and new attractions as outlined in this report could see far stronger visitation levels being achieved.

Figure 22: Total region projections by visitor type

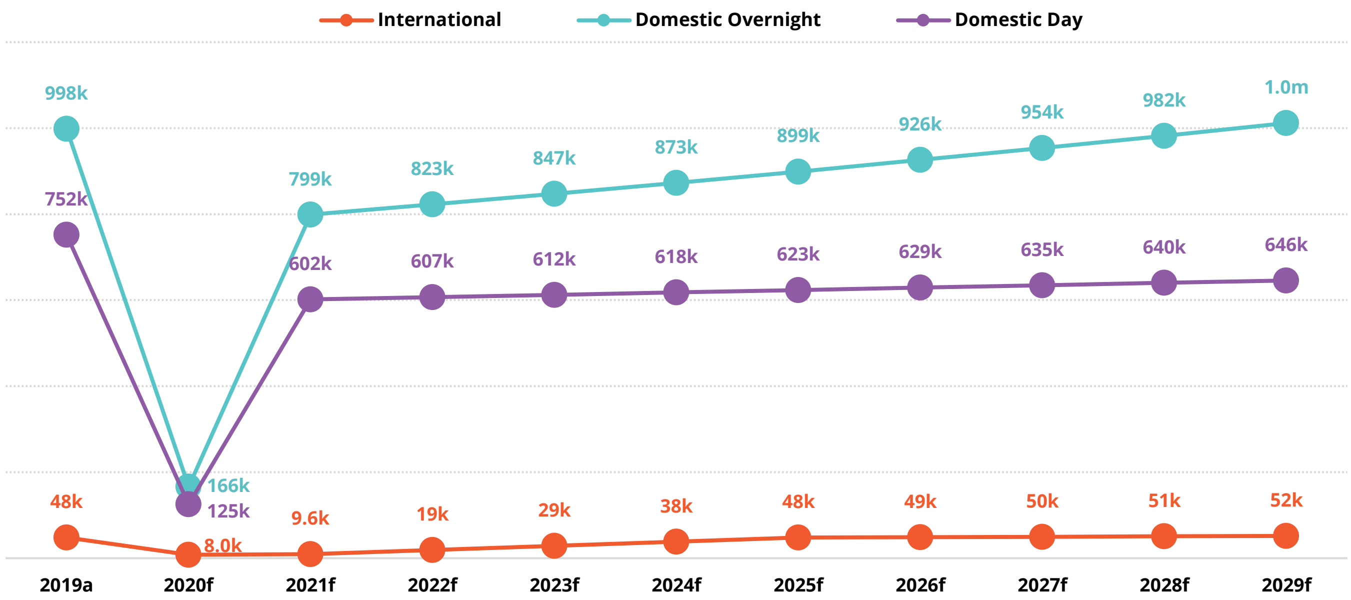


Figure 23: Mackay LGA projections by visitor type

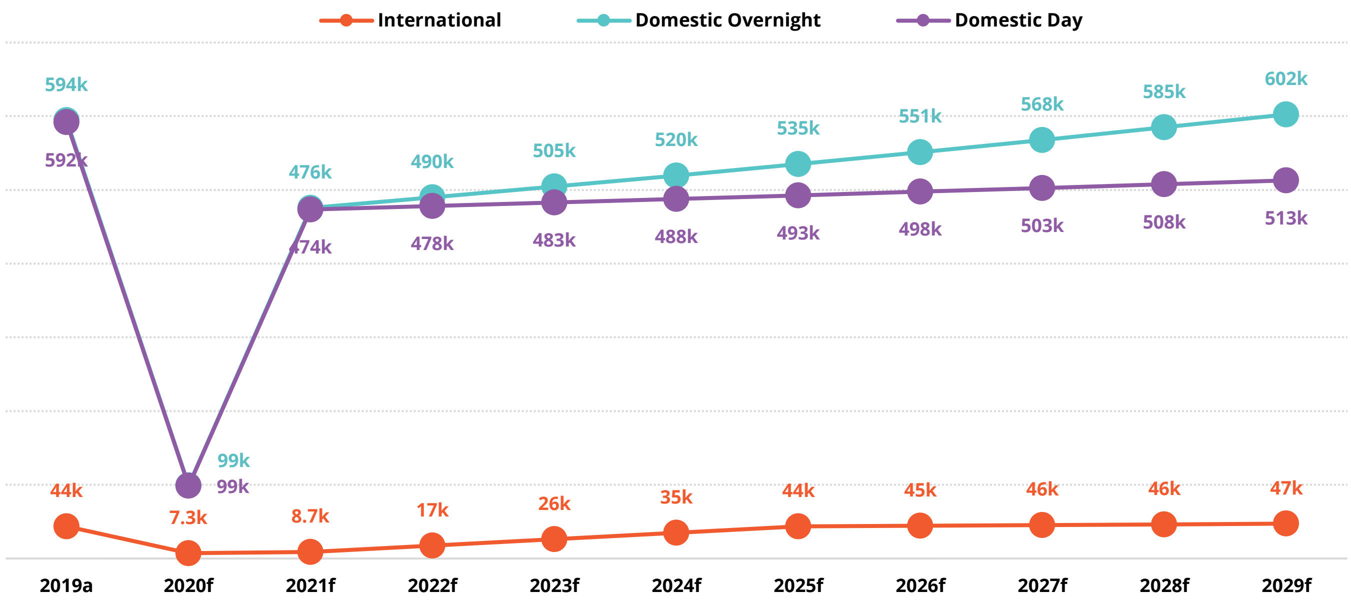
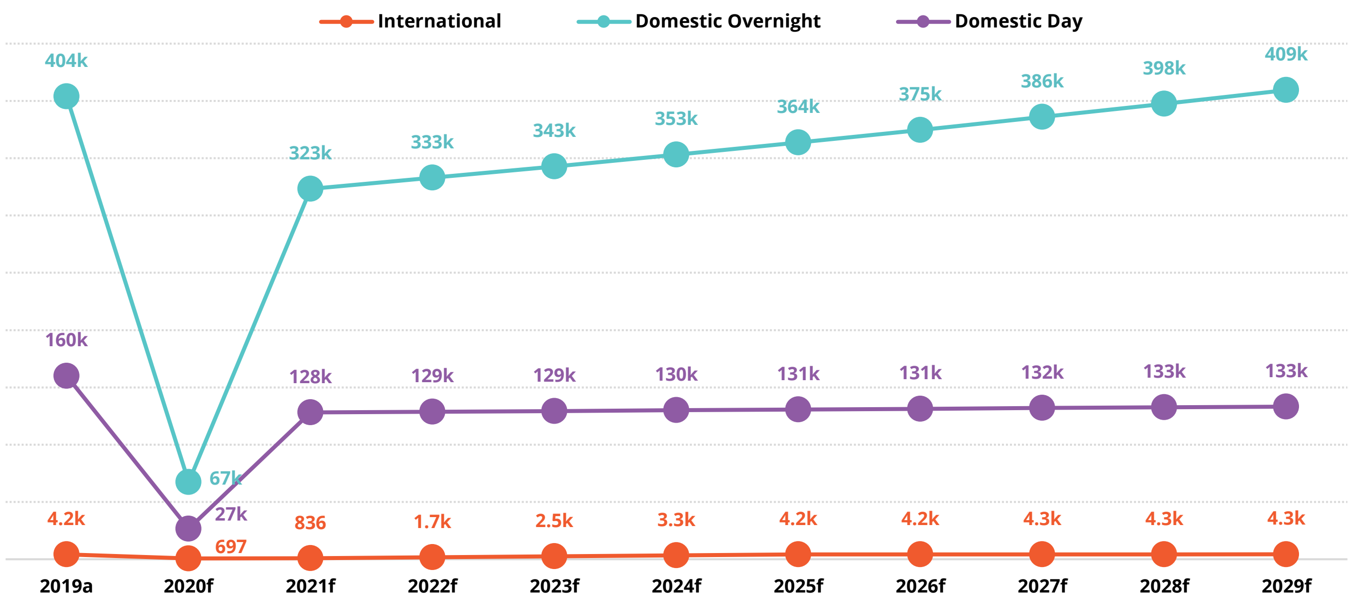


Figure 24: Isaac LGA projections by visitor type



1.6.4. Mackay spend projections

Based on the visitor projections outlined in the above section, and the spend per trip per visitor type for each LGA outlined in Table 2 below[23], Table 3 provides the total visitor spend projections for each LGA as well as the Mackay region. It demonstrates that regional visitor expenditure is forecast to significantly decline due to COVID-19 and are not anticipated to reach 2019 levels until 2025.

Table 2: Visitor spend per trip projections

	2019a	2020f	2021f	2022f	2023f	2024f	2025f	2026f	2027f	2028f	2029f
Mackay LGA Spend p/trip											
Domestic Day	$136	$139	$141	$144	$147	$150	$153	$156	$159	$162	$166
Domestic Overnight	$391	$399	$407	$415	$424	$432	$441	$450	$459	$468	$477
International	$453	$462	$472	$481	$491	$500	$510	$521	$531	$542	$552
Isaac LGA Spend p/trip											
Domestic Day	$113	$116	$118	$120	$123	$125	$128	$130	$133	$135	$138
Domestic Overnight	$256	$262	$267	$272	$278	$283	$289	$295	$300	$307	$313
International	$417	$425	$434	$443	$452	$461	$470	$479	$489	$499	$509

Table 3: Visitor spend projections

	2019a	2020f	2021f	2022f	2023f	2024f	2025f	2026f	2027f	2028f	2029f
Mackay LGA Total Visitor Spend											
Domestic Day	$80.5m	$13.7m	$67.0m	$69.0m	$71.1m	$73.2m	$75.4m	$77.7m	$80.1m	$82.5m	$85.0m
Domestic Overnight	$233m	$39.6m	$194m	$203m	$214m	$225m	$236m	$248m	$260m	$274m	$287m
International	$19.8m	$3.4m	$4.1m	$8.4m	$12.9m	$17.5m	$22.3m	$23.2m	$24.2m	$25.1m	$26.2m
	$333m	**$56.6m**	**$265m**	**$281m**	**$298m**	**$315m**	**$334m**	**$349m**	**$365m**	**$381m**	**$399m**
Isaac LGA Total Visitor Spend											
Domestic Day	$18.1m	$3.1m	$15.1m	$15.5m	$15.9m	$16.3m	$16.7m	$17.1m	$17.5m	$18.0m	$18.4m
Domestic Overnight	$104m	$17.6m	$86.2m	$90.6m	$95.2m	$100m	$105m	$110m	$116m	$122m	$128m
International	$1.7m	$296k	$363k	$740k	$1.1m	$1.5m	$2.0m	$2.0m	$2.1m	$2.1m	$2.2m
	$124m	**$21.0m**	**$102m**	**$107m**	**$112m**	**$118m**	**$124m**	**$129m**	**$136m**	**$142m**	**$149m**
Total Mackay Region Visitor Spend											
Domestic Day	$98.6m	$16.8m	$82.1m	$84.5m	$87.0m	$89.5m	$92.1m	$94.8m	$97.6m	$100m	$103m
Domestic Overnight	$336m	$57.2m	$280m	$294m	$309m	$325m	$341m	$358m	$376m	$395m	$415m
International	$21.6m	$3.7m	$4.5m	$9.2m	$14.0m	$19.0m	$24.3m	$25.2m	$26.2m	$27.3m	$28.4m
Total Spend	**$456m**	**$77.6m**	**$366m**	**$388m**	**$410m**	**$433m**	**$457m**	**$478m**	**$500m**	**$523m**	**$547m**

[23] Note visitor spend per trip projections have been increased by 2% per annum to account for CPI

2. SWOT ANALYSIS

Table 4 provides an analysis of the strengths, weaknesses, opportunities and threats (SWOT) for the region from a tourism destination perspective and to offer a succinct context for why tourism investment should occur and where and how.

This SWOT analysis focuses on the future investment and infrastructure potential for the region and is the result of research as well as stakeholder feedback. The opportunities identified within this report were underpinned by this analysis.

Table 4: Mackay Tourism SWOT Analysis

STRENGTHS	WEAKNESSES
■ High-quality natural environment ■ Demand generated through the mining sector particularly ■ Quality airport infrastructure and airline services ■ Supportive councils to tourism and related investment ■ Quality marina ■ All-year-round attractive climate ■ New accommodation branded stock ■ Greater Whitsunday Food Network ■ GBR World Heritage status ■ Interesting drive routes ■ Good mix of fishing locations (dams, rivers, estuary, beach, reef and offshore)	■ Lack of sufficient leisure and family attractions and activities ■ Lack of tour operators ■ Service standards in hospitality and retail ■ Difficulty in securing and retaining quality staff ■ Lack of experienced tour operators ■ Impact of the mining boom – staff, short term accommodation, focus on business, not leisure tourism ■ Lack of consistently good food and beverage experiences ■ Low repeat visitor numbers ■ Lack of public transport ■ Lack of good tour route itineraries ■ Virtually no reef access ■ Industry fixated on the coal and resource sector ■ A small number of Destination Events ■ Some accommodation product very tired
OPPORTUNITIES	**THREATS**
■ Create a built environment that complements the natural environment ■ Spread the economic benefits of tourism more widely throughout the region through new attractions, experiences and niche sectoral accommodation ■ Improve ground transport options ■ Improve occupancy rates particularly in Mackay CBD in weekends through stronger packaging ■ Develop a string of higher-end, boutique fishing (and other) lodges ■ Strengthen the region's fishing experience offering through additional guided tours, events and accommodation ■ Develop a higher-quality destination holiday park ■ Grow the region's mountain bike tracks and events ■ Better interface with Mining Industry – interpretive trails, sites of interest- make it accessible to see and learn ■ Refurbish older motel properties where possible ■ Introduction of agri-tourism experiences (farm stays, produce picking, meet the maker) ■ Develop higher-end health and wellness product ■ Day tours to surrounding islands ■ Adventure product leveraging off the region's terrain (mountain biking, abseiling, hang gliding) ■ Signature, unique destination food festivals ■ Voluntourism opportunities with the region's wildlife (e.g. Dugongs) ■ Gold prospecting experience/attracting leveraging off the region's history with this sector ■ Enhancements to St Lawrence Wetlands (including pop-up accommodation)	■ Fluctuations in coal mining – lower prices/volumes ■ Inability to secure investment 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 ■ Post-COVID-19 impact on the mining and resource sector with reducing demand for commodities

3. GAP ANALYSIS

3.1. DEVELOPING THE AUDIT

The following sections provide a tourism product audit for the region. The purpose is to ascertain where tourism product is spatially clustered and to identify where product gaps may exist in the tourism product mix.

The audit is primarily based on the Australian Tourism Data Warehouse's (ATDW) product database and supplemented with an extensive desktop research exercise as well as a review of tourism review websites. **It is important to note, therefore, that the audit may not be fully comprehensive, particularly for those operators who are not listed online.**

The audit has revealed that there is a need to work with operators, particularly micro-smaller operators to ensure they are aware of the need and many benefits of being listed on the ATDW. Many are not. The ATDW's ultimate function is to support Australian tourism operators with digital marketing to help extend their exposure and attract more business online. Through a single listing, an operator's details will then appear on Australia.com and over 50 other websites.

3.2. ACCOMMODATION AUDIT

The accommodation audit focused on commercial and non-commercial (often holiday homes) forms of accommodation. Table 5 provides a summary of the categories utilised.

Table 5: Accommodation type categories

- **B&B**
- **Backpackers**
- **Camping Areas**
- **Holiday Homes/Apartments**
- **Holiday Parks/Caravan Parks**
- **Hotels**
- **Motels**
- **Pub Accommodation**
- **Resorts**
- **Serviced Apartments**

Some properties are listed online with multiple categories. Stafford has selected the most applicable category based on online information available.

For each property, the number of rooms (where provided online) was also included. Much of this information has been gathered through search engines such as TripAdvisor, Hotel.com and Expedia.

3.2.1. Number of accommodation properties & rooms

Figure 25 provides a summary of the number of accommodation properties throughout the region and the number of estimated rooms. It is important to note that this does not include an assessment of powered and unpowered caravan and camping sites, mining accommodation and there were some properties where room numbers were unable to be obtained. It demonstrates the following.

- In total, the region has 168 accommodation properties and 3,954 accommodation rooms[24].
- Motels are the main type of property, comprising 43% of all properties in the region.
- Motels also offer the most room stock, providing an estimated 1,685 rooms (34% of total rooms stock) in the region.
- For holiday parks/caravan parks, the room count reflects only those in cabin/villas offered, it does not reflect powered/unpowered sites. Additionally, site counts have not been provided for camping sites in the assessment and, therefore, camping ground room counts display a null value.
- Accommodation for mining employees has been excluded from this assessment. This is because:
  - the capacities in these properties are significant and skew the results;
  - the accommodation is typically not available for the leisure market (it is usually booked out by mining companies); and
  - the accommodation does not tend to appeal to a leisure market.

[24] Note, rooms are considered individual rooms which can be rented out to different parties. If a property has multiple rooms but these cannot be rented to individual parties then this is counted as one room. For example, an Airbnb house which has three rooms within the house is counted as one room unit. The same can be said for a serviced apartment which has 10 units, with three rooms in each – only 10 rooms have been included in the assessment.

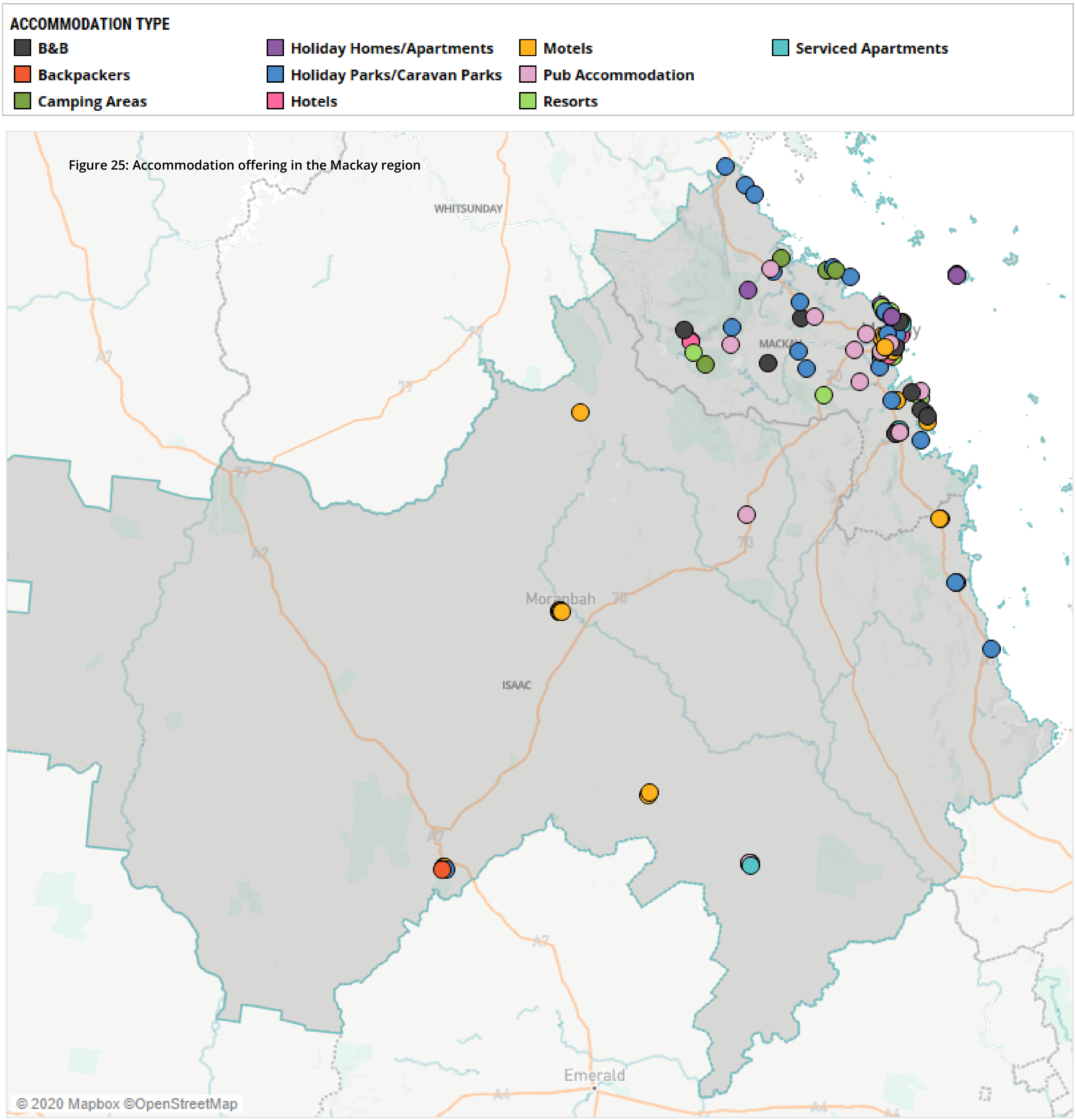
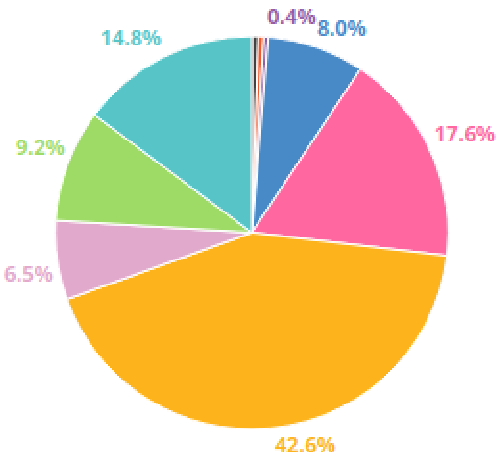


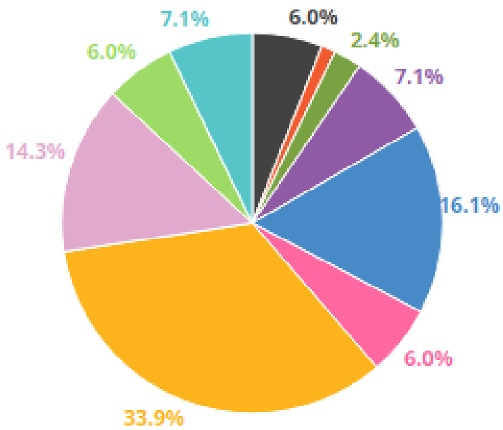
Figure 25: Accommodation offering in the Mackay region

Type	Properties	Rooms
Motels	57	1,685
Hotels	10	694
Serviced Apartments	12	584
Resorts	10	365
Holiday Parks/Cara..	27	316
Pub Accommodation	24	257
B&B	10	20
Backpackers	2	19
Holiday Homes/Apa..	12	14
Camping Areas	4	
Total	168	3,954

% SHARE OF ROOMS BY PROPERTY TYPE



% SHARE OF PROPERTIES BY PROPERTY TYPE



3.2.2. Branded accommodation properties

Branded accommodation product is defined as those properties which are managed, marketed, and/or owned by a national or international accommodation property brand. Such brands include, but are not limited to:

- larger, higher-quality international brands such as Accor properties (Ibis, Novotel, Sofitel etc), International Hotel Group properties (Regent, Intercontinental, Crowne Plaza etc.);
- international mid-range brands such as Best Western, Quality Inn, Comfort Inn etc;
- destination holiday park brands including BIG4, Ingenia and Discovery Parks; and
- backpacker hostel brands including YHA.

Although for some markets the brand of a property is not as important as the quality, there are some which desire to only stay at well-known and reputable branded properties. This is primarily because of the consistency of quality and standards they can offer and the ability to secure member benefits as part of their brand loyalty programs. These properties also often have greater appeal particularly to higher value domestic and international travel markets which gravitate to 4-5 star internationally recognised brands.

The challenge for most LGAs around Australia, particularly those outside major cities, is the lack of higher quality branded properties. When one applies an international standard (rather than a self-assessment approach), it is found that the offering in Mackay is heavily weighted to a lower to mid-range of accommodation options.

With changes in the type of visitor markets likely to have the propensity and income to travel in the medium to longer-term in the future from a mixture of intrastate, interstate and inbound visitor markets, having an accommodation mix to appeal to a more discerning market which offers higher value and spend patterns, is particularly important.

While having a sufficient level of branded accommodation product is therefore valuable from a demand perspective, from a marketing perspective they are also important for destination marketing because of the profile they bring with them and the extensive marketing budgets which ultimately end up promoting a destination, rather than just the accommodation facility on its own.

Figure 26 on the following page provides a summary of the properties in the region which are branded and which achieve a high-quality rating (the full list is contained in Appendix 1. It demonstrates the following.

- The region has 16 properties which fall within this category and which offer 1,045 rooms.
- 88% of these properties (14 out of the 16 properties identified) are clustered in (or within proximity to) the Mackay CBD.
- 54% of branded rooms are offered at hotels, followed by serviced apartments (33% of branded room stock).
- The region is fortunate to have several 3.5-4-star branded properties. There are many other regional locations throughout Queensland and Australia which struggle to attract investment/interest from major brands (such as Quest, Oaks, Rydges etc.).
- There are only two branded destination holiday parks in the region. All other holiday parks identified in the audit tend to offer facilities, services and layouts which often more so resemble traditional caravan parks. The destination holiday park sector has experienced significant growth, and, particularly for coastal locations, there is an expectation (particularly from the family market) that certain facilities and attractions (such as water play areas, extensive pools, highly attractive landscaping etc.) are offered at these parks.

It is important to note that the bulk of visitation to the region is skewed to business-related travel, often associated with the mining and wider resource sector. The holiday leisure market is currently a smaller visitation segment for the region, although the potential exists to strengthen the appeal of the region to an intrastate and interstate domestic holiday visitor market based on offering a wider range of tours and attractions, and niche accommodation to supplement the current accommodation mix available.

ACCOMMODATION TYPE

Holiday Parks/Caravan Parks | Hotels | Motels | Resorts

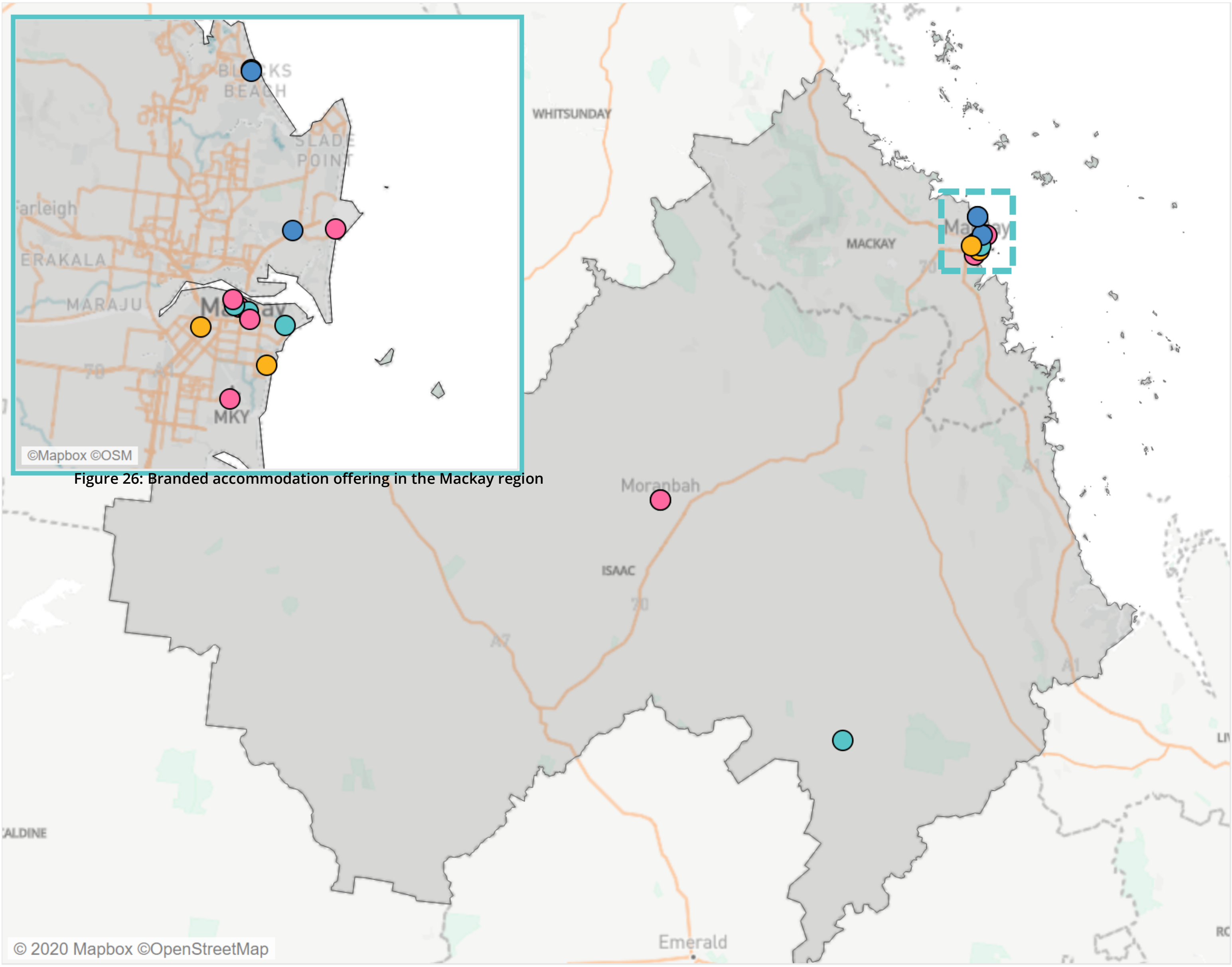
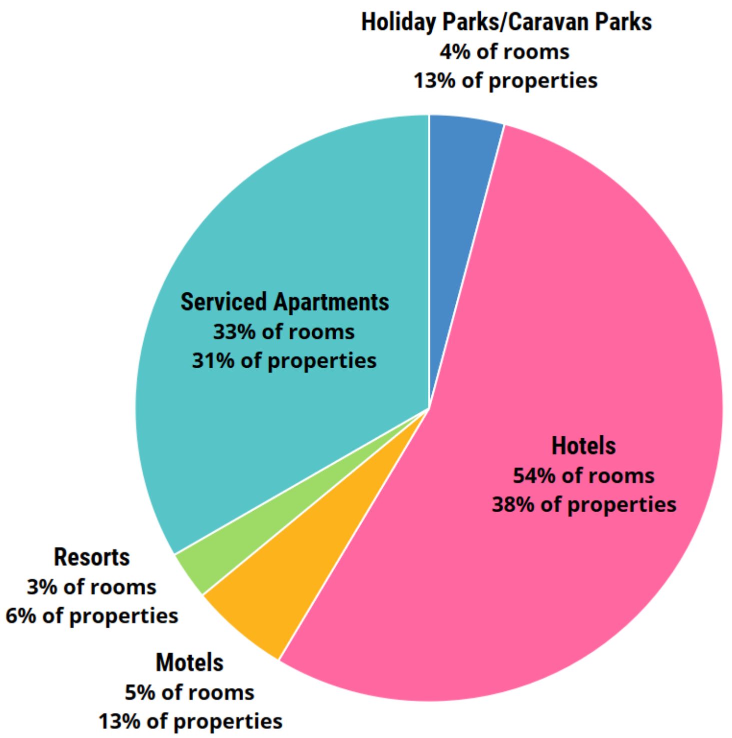


Figure 26: Branded accommodation offering in the Mackay region

% BREAKDOWN OF BRANDED ACCOMMODATION PROPERTIES



BRANDED ACCOMMODATION PROPERTIES

Type	Name	
Holiday Parks/ Caravan Par..	BIG4 Mackay Blacks Beach Holid..	1
	BIG4 Mackay Marine Tourist Park	1
	Subtotal	2
Hotels	Direct Hotels - Monterey Moranb..	1
	ibis Mackay	1
	Mantra Mackay	1
	Oaks Mackay Carlyle Suites	1
	Oaks Mackay Rivermarque Hotel	1
	Rydges Mackay Suites	1
	Subtotal	6
Motels	Best Western Marco Polo Mackay	1
	Econo Lodge Beachside	1
	Subtotal	2
Resorts	Comfort Resort Blue Pacific	1
	Subtotal	1
Serviced Apartments	Direct Hotels - Pacific Sands	1
	Oaks Middlemount Suites	1
	Oaks Moranbah Suites	1
	Quest Mackay MacAlister St	1
	Quest Mackay on Gordon	1
	Subtotal	5
Total		16

3.3. ATTRACTIONS/EXPERIENCES AUDIT

Because the tourism sector is so far-reaching, there are many products, experiences and assets which can be considered tourism based. This audit, has, however, focused in on those which are considered primary tourism experiences, that is, those which are marketed and positioned as "things to do" when visitors travel to the region. Those products which are primarily utilised by the local community have been excluded.

To be able to derive qualitative and meaningful findings from the product audit, product has had to be listed within product categories. Product was originally sorted into detailed sub-categories and then summarised into major categories (the audit has used major categories to demonstrate findings). Table 6 summarises the major and subcategories used.

Table 6: Attraction type categories

- Animal Park
- Arts-based Product
- Fishing Tours
- Food Experiences
- Gardens & Parks
- Indoor Recreation
- Major Natural Sites
- Museums & Cultural Attractions/Sites
- Outdoor Recreation
- Tours

When reading the audit findings, it is important to note:

- beaches and non-major lookouts are excluded from the audit because of the number of these throughout the region which would skew the findings;
- general food and beverage (cafes, restaurants, bars) are excluded from the audit, rather, the audit only focuses on unique food experiences such as distilleries, food tours, cooking classes etc; and
- the audit does not provide an assessment on the quality of the product as this would require visiting each product which was not possible within the scope of this exercise.

3.3.1. Number of attractions

Figure 27 provides a summary of the tourism attractions and experiences within the region, segmented according to the type of attraction. It demonstrates the following.

- In total, the audit identified 98 tourism attraction and experiences across the region. The full listing is provided in Appendix 2.
- Most experiences (paid and free) are 'museums and cultural attractions/sites' which made up 29% of all attractions identified. Many of these are managed/owned by the local councils. This was followed by 'major natural sites', representing 23% of the product identified.
- There is limited indoor/all-weather recreation product, making up just 3% of the product identified.
- As per the map, the bulk of the product is clustered towards the coast and Mackay CBD. There is a small cluster of product at Clermont and this primarily comprises museum and cultural attractions/sites.
- There are many currently free experiences which could, with the right operator, be transformed into tour-based product. This includes bird watching tours, diving tours, walking tours, wildlife viewing etc. All of these leverage off existing natural assets which the region is fortunate to have.
- More than half (64%) of all the experiences identified are free experiences and attractions which make it a challenge to derive higher visitor yield with limited commissionable tourism product. This is important to note, as much effort by councils especially, has gone into creating high-quality trails, cultural experiences etc., however, without the corresponding commissionable product (pop-up or permanent cafés and retail, guided experiences and other tour operator product), the region will continue to find it hard to generate stronger visitor yield and better economic outcomes for their visitor economies.
- Determining attractions and experiences which are unique to the region is important as that can help drive market interest. The size of the South Sea Islander community is noted as significant in Mackay, and previous work identified the possibility for an interactive visitor attraction experience to tell the history of blackbirding etc. These and other unique product suggestions are what may be needed to help drive stronger higher-yielding visitor markets.

ATTRACTION TYPE KEY

- Animal Park
- Arts-based Product
- Fishing Tours
- Food Experiences
- Gardens & Parks
- Indoor Recreation
- Major Natural Sites
- Museums & Cultural Att..
- Outdoor Recreation
- Tours

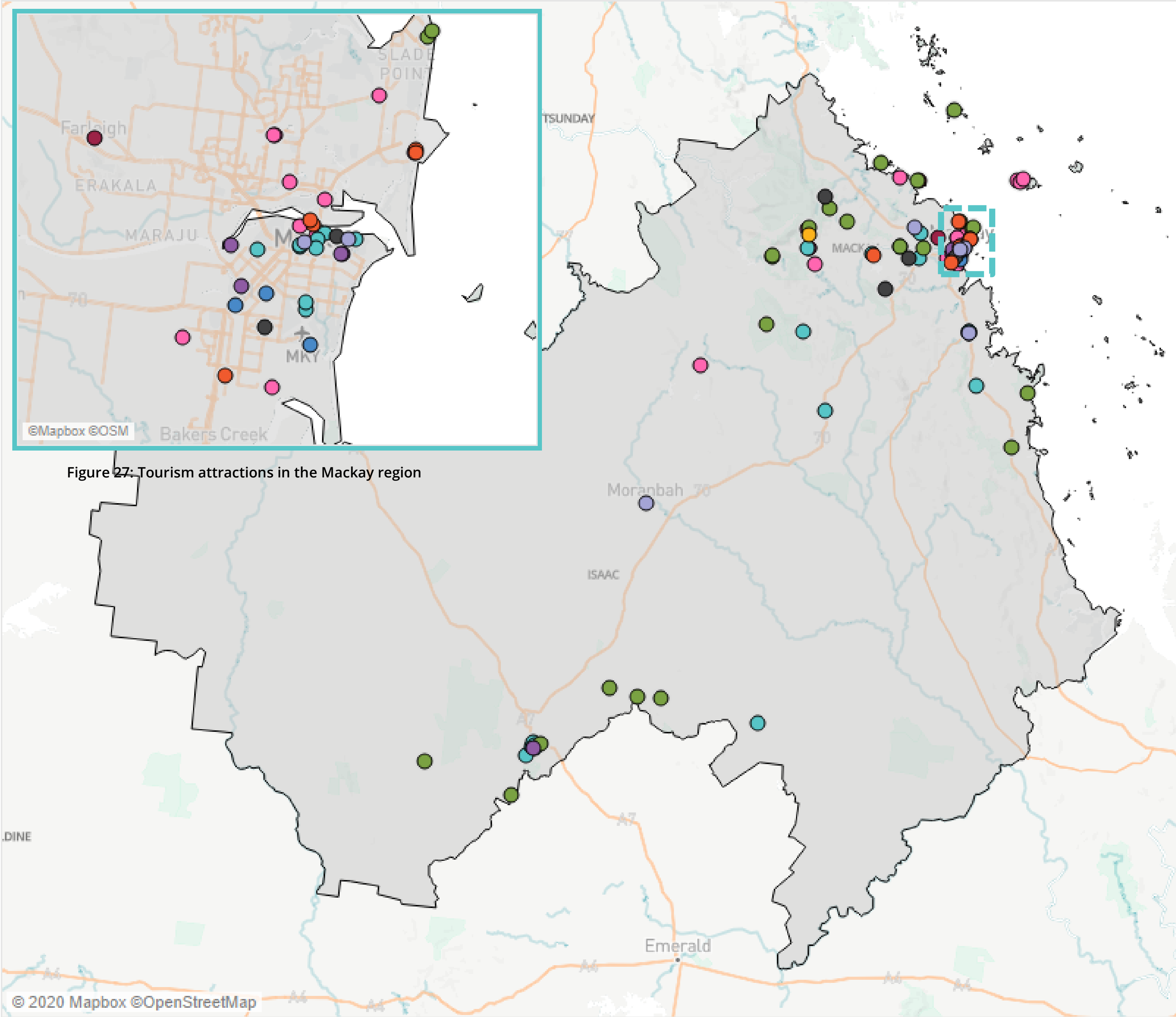
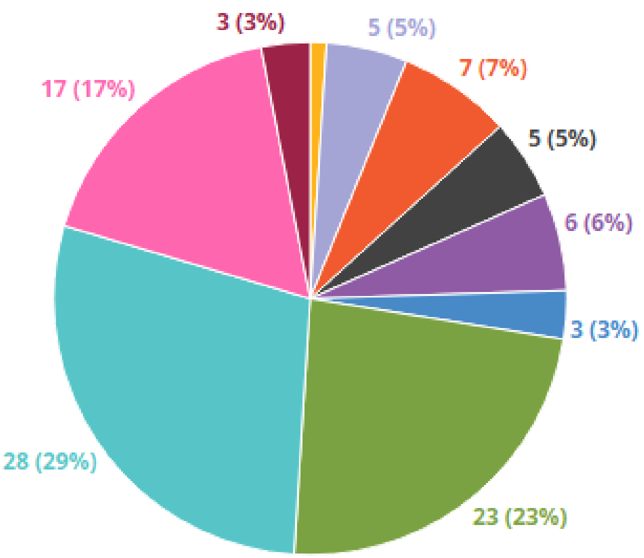
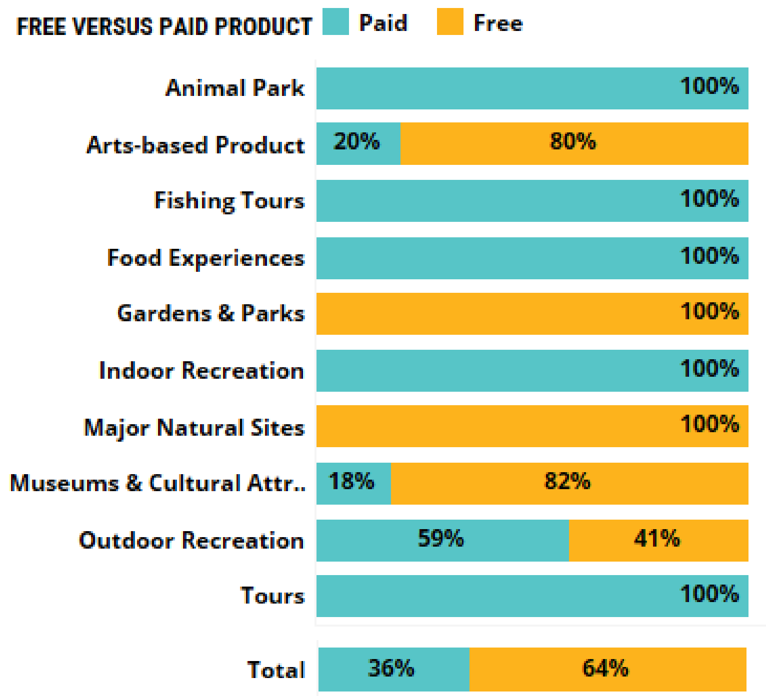


Figure 27: Tourism attractions in the Mackay region

BREAKDOWN OF ATTRACTIONS BY TYPE



FREE VERSUS PAID PRODUCT



3.3.2. Destination events

Destination events differ from community events because of the type of patrons they attract, that is, they tend to attract a larger proportion of visitors from outside the region in which they are held. This is not discounting the importance of community events but rather identifies that there is a difference, particularly because of the economic and branding/positioning benefits as well as social and community outcomes which are generated through destination events.

The Mackay Region Event Strategy 2020-2025 demonstrates the large number of events held in the Mackay LGA alone, including:

- 58 sporting events;
- 54 business events;
- 83 lifestyle and culture events;
- 9 civic events; and
- 39 community events.

Tourism and Events Queensland (TEQ) release a Queensland Events Calendar (https://www.queensland.com/en-au/events) which summarises the major destination events held in each region each year.

The calendar lists only one destination event which is situated in Mackay, being the Mackay Festival of Arts, held in July. By way of contrast, the Whitsundays region has seven destination events listed in the calendar.

It is understood that Mackay LGA has a vision to "develop into a leading regional events destination"[25].

The opportunity exists to identify 1-2 unique, signature destination events for the region. This could include developing existing events to destination event status (such as the St Lawrence Wetlands Weekend) or introducing new events. Importantly, the events need to be unique and should be clearly differentiated from those destination events offered in other surrounding/competing regions.

3.4. GAP ANALYSIS

The following gap analysis is based on:

- online data analysis of the region's product offering and (where applicable) the quality of this;
- discussions with industry and other stakeholders; and
- previous strategies/research that has been undertaken for the region.

It is an important component of this project as it provides an opportunity to step back and assess what, if anything, is missing to support growth in the region's visitor economy and potentially why some of these product gaps may have struggled to be filled to date.

3.4.1. Accommodation

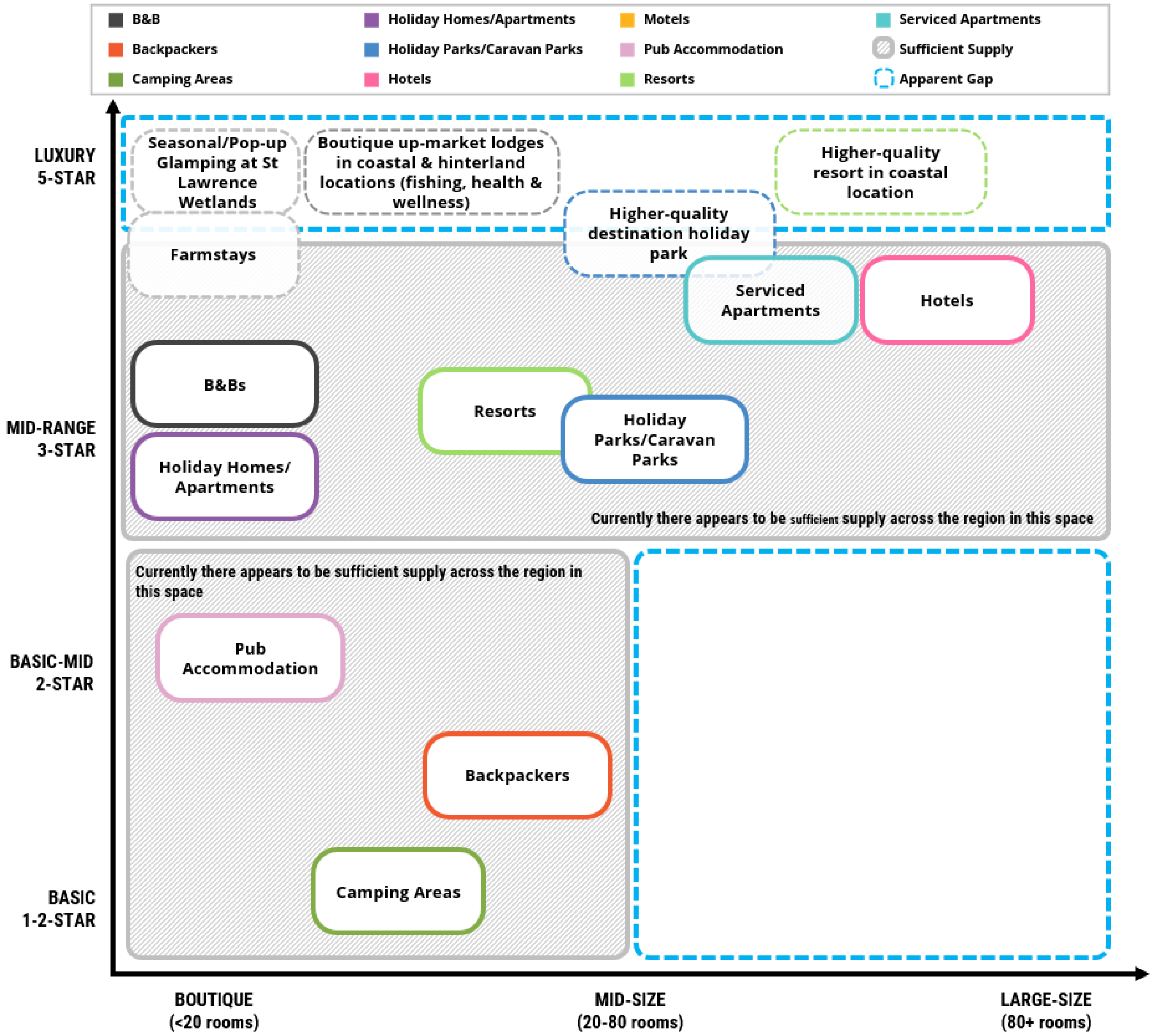
The audit undertaken, along with the research and consultation undertaken, indicates that while there are many accommodation options within the basic (1-2-star) and mid-range (3-3.5 star), there is a limited number of higher-quality (based on international benchmarking) properties (boutique or larger size). There is also a limited number of properties which leverage off the strengths of the region's geography and assets (such as fishing lodges, higher-quality coastal resorts etc.).

Figure 28 on the following page demonstrates the gaps identified within the accommodation mix. Opportunities exist to consider encouraging, by way of example:

- boutique-sized (30 rooms or less) up-market lodges in coastal and hinterland locations which could potentially have a focus on fishing (such as Tasmania's or New Zealand's higher-quality fishing lodges);
- a larger-scale, higher-quality resort situated in a coastal location;
- a higher-quality, branded (for example, YHA) and larger-scale backpackers' property to leverage off the growing "flashpackers" market; and
- a higher-quality, branded, destination holiday park;

[25] Mackay Region Event Strategy 2020-2025

Figure 28: Accommodation gap assessment



3.4.2. Attractions/experiences

Figure 29 provides a gap assessment of the attractions/experiences sector in the region.

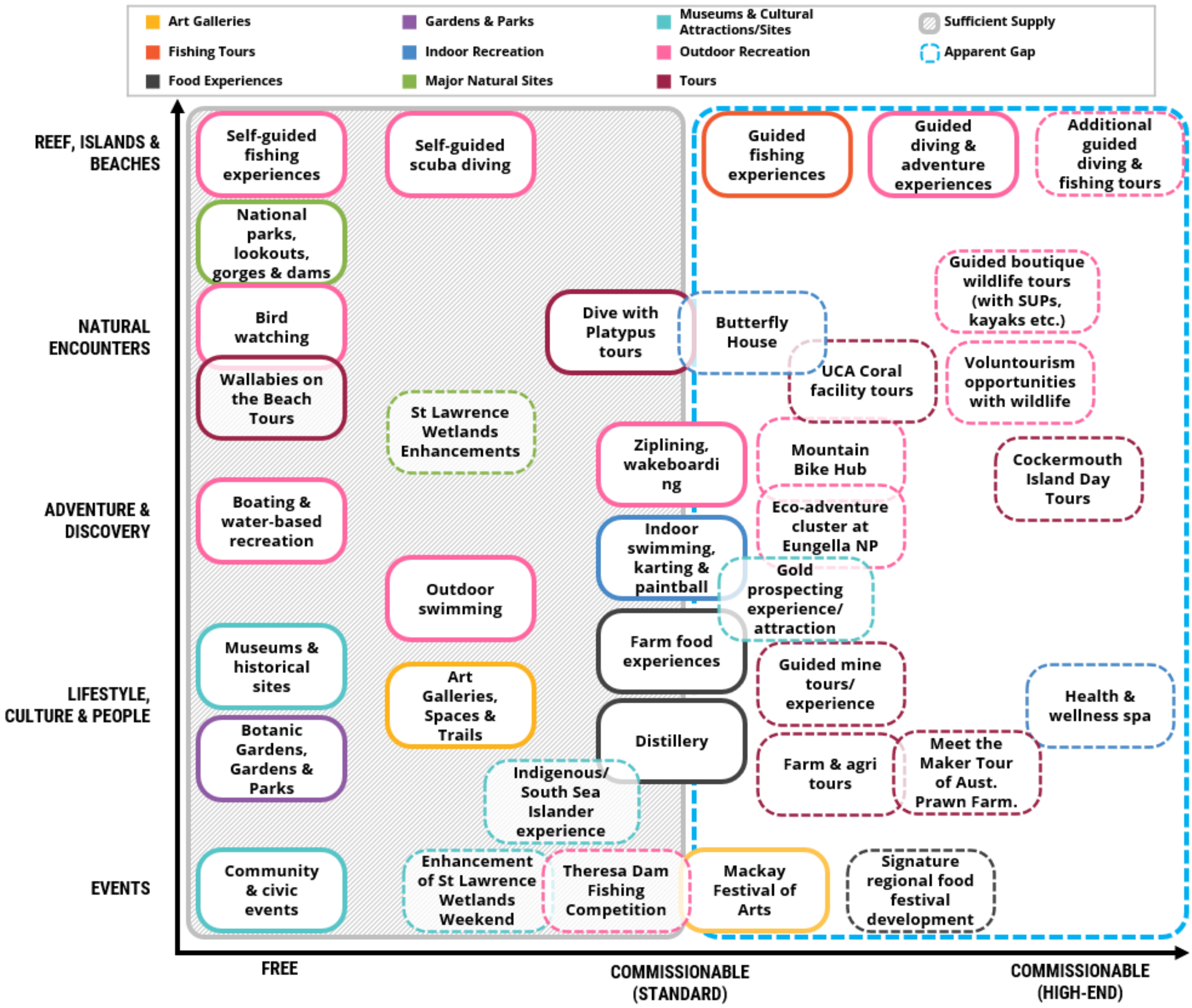
As identified in the product audit, the region currently has a plethora of free product including (but not limited to) natural sites (such as beaches and lookouts), trails and historic sites/attractions, but there is limited:

- commissionable (pay-for) product;
- all-weather tourism product and experiences particularly for those times of inclement weather;
- attractions which are focused primarily on families with children;
- evening-based experiences to encourage a longer length of visitor stay and to provide experiences which locals can enjoy;
- higher quality food and beverage offering, particularly in those destinations which are not currently major hubs;
- Aboriginal and South Sea Islander cultural product;
- commissionable mountain biking product; and
- agri- and farm-based tourism product.

Nonetheless, Figure 29 demonstrates there is a range of attractions and experiences which could be developed throughout the region to enhance the visitor experience, appeal to a broader visitor market and to increase visitor yield.

It is important to note that while some free product (i.e. non-paid product) has been included in the gap analysis, there is the potential/need to introduce commissionable experiences (such as guided tours and pop-ups) as part of these experiences.

Figure 29: Attractions/experiences gap assessment




Pine Islet Lighthouse
1885 - 1985
LICENCED PREMISES
NO ALCOHOL TO BE
BROUGHT ON TO
THESE PREMISES

4. COMPARATIVE ANALYSIS

Queensland has a plethora of strong and well-established visitor destinations, including Noosa, Whitsundays, Sunshine Coast, Gold Coast, Cairns and Townsville. The Whitsundays is the closest of these to Mackay and while this can be viewed as a challenge for the region, this proximity to a major visitor hub/market should also be considered an opportunity. To capitalise on this opportunity, however, requires differentiating the region's product offering from that which is available in surrounding regions. As this project has concentrated primarily on product development, this requirement has been a particular focus when identifying product gaps and opportunities.

Figure 30 provides a summary of surrounding regions/competitors to Mackay, and their existing focus/themes. From this, the following is distilled.

Beaches, beaches and more beaches: One of QLD's primary strengths is its stunning beaches and coastline environment. The challenge with this, however, is that most destinations throughout the State have equally attractive beaches and coastline. There is a need, therefore, to provide experiences which interact with this environment to achieve a point of differentiation.

Mackay's strength would appear to be in its highly accessible fishing and boating experiences on offer. In addition to coastal fishing experiences, the region has three dams which are well stocked with fish (such as barramundi and yellow belly) as well as several rivers and estuaries which can also be accessed for fishing. This provides all-weather and all-year-round fishing opportunities.

It is understood that while the diving experiences in the region are high-quality, the tidal conditions can make it problematic to market this as a product year-round.

Mountain biking as a point of difference: The region's topography lends itself to high-quality mountain biking experiences. The region already has some existing trails and there are plans to introduce additional trails. This could be a point of difference for the region, given there are limited higher-quality mountain biking experiences in surrounding regions.

The key for the region, however, is ensuring that mountain biking is not a free experience only. Ways of introducing commissionable elements include pop-up cafés at the start/end of trails, pop-up shops with a focus on mountain biking gear and rentals and offering paid guided mountain biking experiences.

Islands are more accessible elsewhere: While the region has several islands within its boundaries such as Keswick Island and St Bees Island, access to these by visitors is currently limited. Access is constrained for several reasons including tidal conditions and the fact that many are classified as protected areas, limiting what can be developed and what activities can take place on these.

Surrounding regions, such as the Whitsundays and Southern Great Barrier Reef have far more accessible and developed islands which are extensively marketed such as Hamilton Island and Great Keppel Island etc.

History & heritage needs a point of difference: More than one-quarter of the tourism product identified in Mackay can be categorised as 'museums and cultural attractions/sites'. However, many other regions throughout Queensland also offer a similar level of history/heritage product. The exception may be the fascinating and sad history associated with the South Sea Islander communities in the region, and the lack of an attraction/experience in Australia to date, which tells the story of blackbirding and the implications of this.

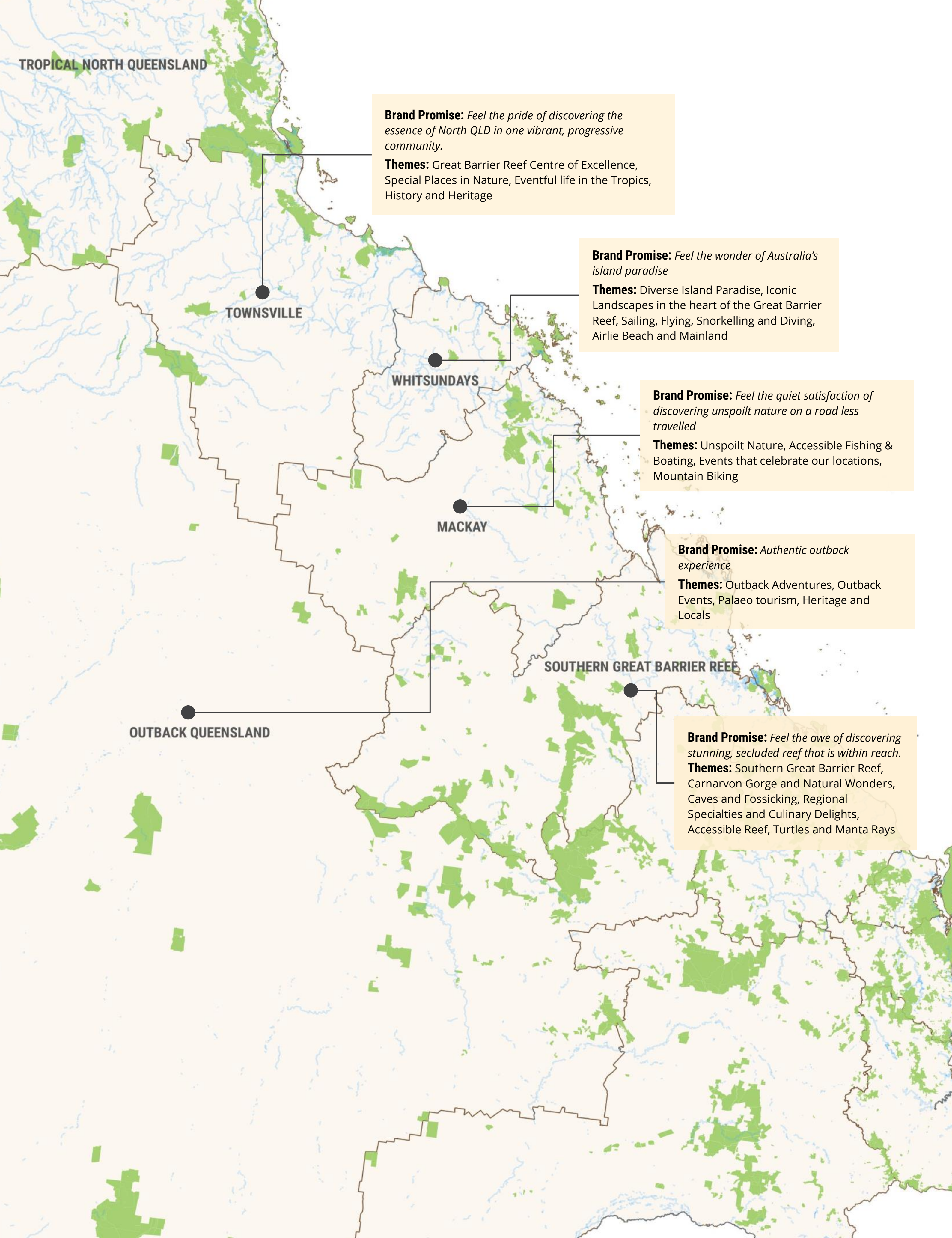
For the region to achieve a strategic positioning in this tourism niche, there is a need to strongly differentiate from what is on offer elsewhere. Whatever is developed needs to be highly interactive and engaging.

'Foodie' tourism is growing, but it needs to be high-quality: Food tourism is one of the fastest-growing tourism sectors. It is recognised by the United Nations World Tourism Organisation as one of the "most dynamic and creative segments of tourism".[26]

The challenge with food tourism, however, is that many destinations are looking to capitalise on this growth and interest, and, as such it is a highly competitive segment.

[26] UNWTO Global Report on Food Tourism, page 5.

Figure 30: Competitor destinations and surrounding regions themes and brand promise



5. CONSUMER SENTIMENT ASSESSMENT

An assessment of visitor/consumer sentiment has been undertaken for the Mackay region, along with two nearby regions being the Whitsundays and Rockhampton. The sentiment assessment has been undertaken for 'places to stay' and 'things to do' from one of the leading global travel review websites, TripAdvisor.

When reviewing the data, it is important to understand that TripAdvisor does not list accommodation operators based on LGAs or official tourism boundaries, but rather, list based on key destinations. Stafford has, therefore, looked at major destination hubs within each region for the assessment.

5.1. MACKAY SENTIMENT ASSESSMENT

5.1.1. Mackay's Accommodation Consumer Sentiment Assessment

Table 7 provides an assessment of consumer sentiment for the different types of accommodation in each LGA and the region (the full findings are included in Appendix 3). It demonstrates the following.

- Overall, the region's accommodation offering averages a user-generated score of 3.96.
- Boutique accommodation (guest houses etc.) receives the highest average rating, achieving an average score of 4.67. This is followed by B&Bs at 4.64.
- Pub Accommodation receives the lowest average rating of 3.29 which is not unexpected given the average price point of this product ($72 per night). Analysing some of the comment feedback associated with these properties indicates the understanding that while these properties are of a lower standard, there is a need for improvements/upgrades to better align with their price point.
- The Resorts category also received an average rating at the lower end (3.50). Analysing some of the negative reviews indicates the need for significant property upgrades. It is also important to note that this category is often impacted by properties who self-categorise as resorts, but, their offering does not reflect consumer expectations of what resorts should offer.
- In Isaac LGA, where leisure accommodation stock is smaller, Serviced Apartments rate the highest, with an average score of 4.33. In Mackay LGA, Boutique Accommodation ranks highest at 4.67.

Table 7: Mackay's Accommodation Sentiment Assessment by LGA and Property Category

	Isaac	Mackay	Average
Boutique Accommodation	0.00	4.67	**4.67**
B&B	0.00	4.64	**4.64**
Serviced Apartments	4.33	4.22	**4.25**
Motels	3.60	4.12	**4.01**
Hotels	0.00	3.94	**3.94**
Holiday Parks/Caravan Parks	4.00	3.86	**3.88**
Resorts	0.00	3.50	**3.50**
Hostel	0.00	3.50	**3.50**
Pub Accommodation	0.00	3.29	**3.29**
Average	**3.81**	**3.99**	**3.96**

Branded properties are an important part of any region's accommodation mix. This is because they are often able to offer more consistent quality standards and product offering, along with larger marketing budgets which help promote the destination they are situated in. Undertaking the sentiment assessment on branded properties only (see Table 8) reveals the branded properties which receive the highest average rating are Serviced Apartments. Many of these properties are operated by large national and international brands so it is not surprising they achieve a high score.

Although the Holiday Parks/Caravan Parks category receives the lowest average rating of branded properties (3.50), this reflects the rating for one property as it is the only branded Holiday Parks/Caravan Park in the region. Nonetheless, consumers have a growing expectation regarding the quality and facilities offered particularly at branded holiday parks. The holiday park sector is booming, and many large holiday park operators are investing significantly into their parks, and, as a result, consumers expect a certain standard and consistency in quality to be offered by holiday parks which are operated by these brands.

Table 8: Mackay's Accommodation Sentiment Assessment for Branded Properties Only

	Average of Rating
Serviced Apartments	4.30
Hotels	4.10
Motels	4.00
Holiday Parks/Caravan Parks	3.50
Average	4.13

Table 9 provides a summary of consumer sentiment regarding the region's accommodation offering based on the average price per night[27]. Not all properties have prices listed and these are flagged as "price n/a". The data demonstrates that those properties which average $300+ per night achieve the highest average rating from consumers (4.50). As the average price per night reduces, consumer sentiment also reduces, with those properties charging less than $100 per night (on average) achieving an average rating of 3.50.

Table 9: Mackay's Accommodation Sentiment Assessment by Price Point

	Average of Rating
<$100	3.50
$100-$199	4.05
$200-$299	4.29
$300+	4.50
Price n/a	3.91
Average	3.96

5.1.2. Mackay's Attractions Consumer Sentiment Assessment

There are 70 attractions, sites and experiences listed on TripAdvisor for the region. Table 10 illustrates how these products rate (out of five), summarised according to product category and shows the following (please note, the full findings of the data scrape are included in Appendix 4 and Appendix 5).

- Product in the Mackay region generally rates quite well, achieving an overall average score of 4.3 (out of 5), based on almost 2,000 individual reviews.
- The retail product that is listed on TripAdvisor achieves the highest average rating of 4.4 This category primarily includes shopping malls. While Stafford generally would not include retail product as part of "tourism experiences" (unless it provides a highly unique experience), the fact that this is listed as a high-ranking category in TripAdvisor is likely to indicate there are potentially limited tourism experiences in the region.
- This is followed by Nature-Based Product (4.31).
- F&B product (which includes unique food experiences, rather than general F&B, cafes, restaurants etc.) rates the lowest, with an average score of 4.0.

Interestingly, while the product audit undertaken by Stafford identified several guided tours, including scuba and fishing experiences, these are not listed when users enter "Things to Do in

[27] Note, TripAdvisor provides a price range for most properties. The upper end figure has been used where provided.

Mackay" (or various other areas in the region). This indicates a lack of digital/social media presence by these operators. There appears to be only **one** bookable product for the region listed on TripAdvisor being guided tours of the Sarina Sugar Shed (which rate well, with an average score of 4.5). Comparatively, the Whitsundays has **121** bookable products.[28] Further details on comparative regions are included in Section 0.

When "Things to do in Mackay" is entered into TripAdvisor, the top five experiences (based on Traveller Favourites) are listed as:

1. Mackay Aqua Park (with 145 reviews)
2. Bluewater Lagoon (with 357 reviews)
3. Bluewater Trail (with 159 reviews)
4. Mackay Regional Botanic Gardens (with 229 reviews)
5. Caneland Central Shopping Centre (with 96 reviews)

Table 10: Mackay's 'Things to do' Sentiment Assessment by Category

	Cultural & Heritage Product	F&B Product	Nature-Based Product	Points of Interest & Landmarks, Historic Sites	Recreation Product	Retail	Total Average Rating
Isaac	3.88	n/a	4.25	4.00	n/a	n/a	**4.09**
Mackay	4.40	4.00	4.33	4.38	4.30	4.38	**4.34**
Total Average Rating	**4.25**	**4.00**	**4.31**	**4.30**	**4.30**	**4.38**	**4.29**

5.2. COMPARATIVE SENTIMENT ASSESSMENT

The sentiment assessment has also been undertaken on two regions which are competitors to Mackay being the Whitsundays and Rockhampton. These two regions are considered competitors because they are situated north and south (respectively) of Mackay and offer elements of product similarity.

As stated previously, when reviewing the data, it is important to understand that TripAdvisor does not list accommodation operators based on LGAs or official tourism boundaries, but rather, list based on key destinations. Stafford has, therefore, looked at major destination hubs within each region for the assessment. For the Whitsundays, this included Airlie Beach, the Whitsunday Islands and Proserpine and for Rockhampton, this included Rockhampton itself.

This analysis has been undertaken to demonstrate the strengths of each region and to ascertain potentially where gaps may exist.

5.2.1. Competitor Accommodation Consumer Sentiment Assessment

5.2.1.1. Number of Properties and Rooms (listed on TripAdvisor)

Table 11 summarises the accommodation product listing on TripAdvisor, along with room counts. When reviewing this data it is important to note the following.

- TripAdvisor is but one (albeit the major) tourism product review website. Its listings, therefore, may not cover every single provider in a region. This is why the accommodation product audit completed by Stafford in Section 3.2 lists more accommodation properties for Mackay than what is identified in the table below.
- Room count information is only available for properties which have included a room count in their property description. The room counts included for each region, therefore, may not be fully comprehensive but do provide a good snapshot of what is available. Out of the 333 properties included in the assessment, room counts were available for 77% of properties.

The data demonstrates that:

- in Mackay and Rockhampton, motels make up the largest share of room stock, comprising 37% and 57% of room stock respectively, while in the Whitsundays, resorts make up the largest share of room stock (39%);
- Mackay has the greatest number of holiday parks/caravan parks, with 26 of these properties, compared with 10 in the Whitsundays and 3 in Rockhampton) which may reflect the traditional leisure visitor market coming to Mackay (or more probably going through it en route to other destinations north and south) and, in addition, the fact that some permanent residents reside in the caravan park; and
- the Whitsundays has a far larger resort and serviced apartment sector which also correlates to higher average visitor spend patterns.

[28] As of May 14th, 2020

Table 11: Number of Properties and Rooms Listed on TripAdvisor

	Mackay				Rockhampton				Whitsundays			
	Properties		Rooms		Properties		Rooms		Properties		Rooms	
	#	%	#	%	#	%	#	%	#	%	#	%
B&B	8	6%	11	0.3%	0	0%	0	0%	7	5%	14	0.4%
Boutique Accommodation	4	3%	5	0.1%	4	6%	31	2%	8	6%	28	1%
Holiday Homes/Apartments	0	0%	0	0%	0	0%	0	0%	18	14%	20	1%
Holiday Parks/Caravan Parks	26	20%	582	16%	3	4%	84	4%	10	8%	345	10%
Hostel	3	2%	19	1%	3	4%	32	2%	9	7%	360	10%
Hotels	9	7%	672	18%	10	15%	572	30%	7	5%	591	17%
Motels	48	37%	1,359	37%	38	57%	1,002	52%	11	8%	149	4%
Pub Accommodation	10	8%	101	3%	3	4%	46	2%	2	2%	0	0%
Resorts	10	8%	387	10%	0	0%	0	0%	31	23%	1,350	39%
Serviced Apartments	13	10%	553	15%	6	9%	142	7%	30	23%	598	17%
Total	**131**	**100%**	**3,689**	**100%**	**67**	**100%**	**1,909**	**100%**	**133**	**100%**	**3,455**	**100%**

5.2.1.2. Consumer Sentiment by Property Category

The following two tables provide a summary of the sentiment analysis undertaken for Mackay and the two selected competing regions. Table 12's colour scale is a horizontal scale and demonstrates the top to bottom ratings in each region based on accommodation categories (i.e. in Mackay, B&B's rank the highest, hence its green colour coding, and holiday homes rank the lowest, hence its red colouring). Table 13's colour coding, on the other hand, is a vertical scale and illustrates the top to bottom ratings for each accommodation category based on the regions (i.e. B&B's rate highest in Rockhampton, hence the green colour coding and lowest in Mackay, hence its red colour coding).

The data demonstrates the following.

- Mackay's accommodation mix achieves the highest overall average score (3.96), followed closely by Rockhampton (3.95) and the Whitsundays (3.89). This is not unexpected given the investment into Mackay's accommodation sector because of the mining boom but is also heavily influenced by the rating of B&B accommodation and boutique accommodation.
- The Whitsundays' accommodation stock, on the other hand, is potentially impacted by a larger mix of older accommodation stock, though its hotels and resorts rate more highly as do its B&Bs.
- Rockhampton rates more highly in its serviced apartments and hostels.
- Overall, each of the three regions gets a very similar overall accommodation sentiment rating which reflects that the Mackay region appears not to be disadvantaged according to consumer online responses.
- However, when one is only looking at the top-rated region for specific accommodation categories it is clear that the Whitsundays has more top ratings (6/10) compared to the Mackay region with 2/10 and Rockhampton with 2/10 top rankings.

Table 12: Accomm. Sentiment Assessment by Region and Property Category (colour coded by top category in each region)

	B&B	Boutique Accommodation	Holiday Homes/Apartments	Holiday Parks/Caravan Parks	Hostel	Hotels	Motels	Pub Accommodation	Resorts	Serviced Apartments	Overall Average
Mackay	4.64	4.67	0.00	3.88	3.50	3.94	4.01	3.29	3.50	4.25	**3.96**
Rockhampton	0.00	4.38	0.00	3.83	3.67	3.95	3.92	3.33	0.00	4.50	**3.95**
Whitsundays	4.83	4.14	3.55	4.05	3.44	4.07	3.64	3.75	3.88	3.88	**3.89**

Table 13: Accomm. Sentiment Assessment by Region and Property Category (colour coded by top region in each category)

	B&B	Boutique Accommodation	Holiday Homes/Apartments	Holiday Parks/Caravan Parks	Hostel	Hotels	Motels	Pub Accommodation	Resorts	Serviced Apartments	Overall Average
Mackay	4.64	4.67	0.00	3.88	3.50	3.94	4.01	3.29	3.50	4.25	**3.96**
Rockhampton	0.00	4.38	0.00	3.83	3.67	3.95	3.92	3.33	0.00	4.50	**3.95**
Whitsundays	4.83	4.14	3.55	4.05	3.44	4.07	3.64	3.75	3.88	3.88	**3.89**

5.2.2. Consumer Sentiment Against Property Self-Rating

Table 14 provides an analysis of consumer sentiment ratings versus property self-rating (known as star rating) scores. This is useful to demonstrate where there is potentially a mismatch in official ratings and consumer expectations. The data illustrates the following.

- For the Mackay region, pub accommodation, hotels and resorts were rated less highly overall than property self-rating
- B&B's, boutique accommodation, motels and serviced apartment self-rating and consumer sentiment were more closely aligned.

Table 14: Accommodation Sentiment Assessment Against Property Self-Rating

	Property Self-Rating Score:						
	2 ★	**2.5 ★**	**3 ★**	**3.5 ★**	**4 ★**	**4.5 ★**	**5 ★**
Mackay Avg. Visitor Rating	**3.00**	**3.17**	**3.91**	**4.00**	**4.28**	**4.00**	**5.00**
B&B	-	-	4.33	-	4.50	-	-
Boutique Accommodation	-	-	-	-	-	-	5.00
Holiday Parks/Caravan Parks	-	3.75	4.17	-	4.50	-	-
Hostel	3.00	-	-	-	-	-	-
Hotels	-	-	3.50	4.00	4.17	3.83	-
Motels	-	2.00	4.00	4.50	4.38	-	-
Pub Accommodation	3.00	-	3.13	-	-	-	-
Resorts	-	-	3.67	3.50	3.75	-	-
Serviced Apartments	-	-	-	4.00	4.31	4.25	-
Rockhampton Avg. Visitor Rating	**3.33**	**3.50**	**4.03**	**3.94**	**4.16**	**4.50**	**4.50**
Boutique Accommodation	3.00	-	4.83	-	-	-	-
Holiday Parks/Caravan Parks	-	-	-	4.00	4.00	-	-
Hostel	3.67	-	-	-	-	-	-
Hotels	2.50	-	4.00	-	4.07	4.50	-
Motels	3.50	-	3.82	3.93	4.14	-	4.50
Pub Accommodation	-	3.50	4.00	-	-	-	-
Serviced Apartments	-	-	4.00	-	4.50	-	-
Whitsundays Avg. Visitor Rating	**3.64**	**4.00**	**3.98**	**4.17**	**4.21**	**4.40**	**4.50**
B&B	-	-	-	-	4.83	4.50	-
Boutique Accommodation	-	-	4.00	4.50	4.75	-	-
Holiday Homes/Apartments	5.00	-	-	4.50	-	-	-
Holiday Parks/Caravan Parks	4.00	-	4.17	-	4.00	4.50	-
Hostel	3.67	4.00	3.83	-	-	-	-
Hotels	-	-	3.75	-	4.25	-	4.00
Motels	-	-	4.00	-	3.50	-	-
Resorts	1.50	-	3.83	-	4.09	4.50	4.60
Serviced Apartments	-	-	4.10	3.50	4.08	4.25	4.50

5.2.3. Competitor 'Things To Do' Consumer Sentiment Assessment

TripAdvisor has two main categories for tourism attractions, this includes Attractions and Bookable Experiences. Attractions include a wide range of product including free and commissionable product. Bookable Experiences, on the other hand, include only those which can be booked through the TripAdvisor platform.

5.2.3.1. Consumer Sentiment by Attraction Category

The following two tables provide a summary of the attraction's sentiment analysis undertaken for Mackay and the two selected competing regions.

Table 15's colour scale is a horizontal scale and demonstrates the top to bottom ratings in each region based on attraction categories (i.e. in Mackay, retail product ranked the highest, hence its green colour coding, and food and beverage product rank the lowest, hence its red colouring).

Table 16's colour coding, on the other hand, is a vertical scale and illustrates the top to bottom ratings for each attraction category based on the regions (i.e. food and beverage rate highest in Rockhampton, hence the green colour coding and lowest in the Whitsundays, hence its red colour coding).

Table 15: Attractions Sentiment Assessment by Region and Category (colour coded by top category in each region)

	Cultural & Heritage Product	Events	F&B Product	Guided Tours	Health & Wellness Product	Markets	Nature-Based Product	Points of Interest & Landmarks, Historic Sites	Recreation Product	Retail	Sports Camps & Clinics	Transport	Overall Overage
Mackay	4.25	-	4.00	-	-	-	4.31	4.30	4.30	4.38	-	-	**4.29**
Rockhampton	4.22	-	5.00	-	-	-	4.33	4.50	4.00	4.25	-	-	**4.30**
Whitsundays	4.50	4.00	3.50	5.00	5.00	4.00	4.32	4.75	4.50	4.83	5.00	4.63	**4.44**

Table 16: Attractions Sentiment Assessment by Region and Category (colour coded by top region in each category)

	Cultural & Heritage Product	Events	F&B Product	Guided Tours	Health & Wellness Product	Markets	Nature-Based Product	Points of Interest & Landmarks, Historic Sites	Recreation Product	Retail	Sports Camps & Clinics	Transport	Overall Overage
Mackay	4.25	-	4.00	-	-	-	4.31	4.30	4.30	4.38	-	-	**4.29**
Rockhampton	4.22	-	5.00	-	-	-	4.33	4.50	4.00	4.25	-	-	**4.30**
Whitsundays	4.50	4.00	3.50	5.00	5.00	4.00	4.32	4.75	4.50	4.83	5.00	4.63	**4.44**

5.2.3.2. Consumer Sentiment by Bookable Experiences

TripAdvisor also allows visitors to book tourism attractions through its platform. This is available only for those operators who have integrated into the TripAdvisor booking system. While TripAdvisor is not the only platform operators can be listed on, it is one of the world's major travel review and booking websites and, therefore, provides a good platform to undertake analysis on.

Interestingly, there is only one product in the Mackay region which allowed bookings through TripAdvisor. By comparison, the Whitsundays region has 121 different tourism products, tours and packages[29] which can be booked, and Rockhampton has four products/experiences available to book through the platform.

Table 17 provides a summary of the bookable products identified and demonstrates:

- that there are 43 different operators who provide bookable product through TripAdvisor in the Whitsundays, compared with 1 in Mackay and 2 in Rockhampton;
- the number of bookable tourism attractions/experiences available in the Whitsundays indicates:
  - the maturity of leisure tourism product in the Whitsundays, with many operators being digitally savvy and export-ready; and
  - the level of competition in the Whitsundays.
- the majority of bookable product in the Whitsundays comprises Cruises and Sailing experiences (62), followed by Day/Guided Tours (25).

Table 18 provides the number of actual online bookable product on TripAdvisor and demonstrates the significant number of bookable product options available on TripAdvisor for the Whitsundays (and with 50% of these being on-water experiences). The Mackay and Rockhampton regions have little bookable product listed on TripAdvisor.

Table 19 provides the average starting price for each bookable experience listed on TripAdvisor for the regions assessed. It demonstrates the high yield of bookable experiences in the Whitsundays region in particular.

Table 17: Number of bookable experiences on TripAdvisor by region

	Cruises & Sailing	Day/Guided Tour	Fishing Charter	Jet Boat/Jet Ski	Rafting	Scenic Flight	Skydiving	Transfers	Overall Average
Whitsundays	62	25	5	4	1	13	2	9	**121**
Rockhampton	-	4	-	-	-	-	-	-	**4**
Sarina	-	1	-	-	-	-	-	-	**1**

Table 18: Bookable Experiences Sentiment Assessment by Region and Category (colour coded by top category in each region)

	Cruises & Sailing	Day/Guided Tour	Fishing Charter	Jet Boat/Jet Ski	Rafting	Scenic Flight	Skydiving	Transfers	Overall Average
Whitsundays	4.59	4.85	4.60	4.88	5.00	4.60	4.50	4.43	**4.63**
Rockhampton	0.00	4.67	0.00	0.00	0.00	0.00	0.00	0.00	**4.67**
Sarina	0.00	4.50	0.00	0.00	0.00	0.00	0.00	0.00	**4.50**

Table 19: Bookable Experiences Average Price by Category

	Cruises & Sailing	Day/Guided Tour	Fishing Charter	Jet Boat/Jet Ski	Rafting	Scenic Flight	Skydiving	Transfers	Overall Average
Whitsundays	$909	$260	$255	$109	$169	$406	$576	$48	**$592**
Rockhampton	$0	$99	$0	$0	$0	$0	$0	$0	**$99**
Sarina	$0	$26	$0	$0	$0	$0	$0	$0	**$26**

[29] Note gear hire has been excluded from the assessment


START

6. INVESTMENT PROJECTS

6.1. OPPORTUNITIES IDENTIFIED

6.1.1. Summary of the opportunities

53 recommendations have been identified. These recommendations are tourism-focused and categorised as either:

- Accommodation projects
- Attraction-based projects
- Event development projects
- Infrastructure projects
- Strategy projects
- Tour development projects

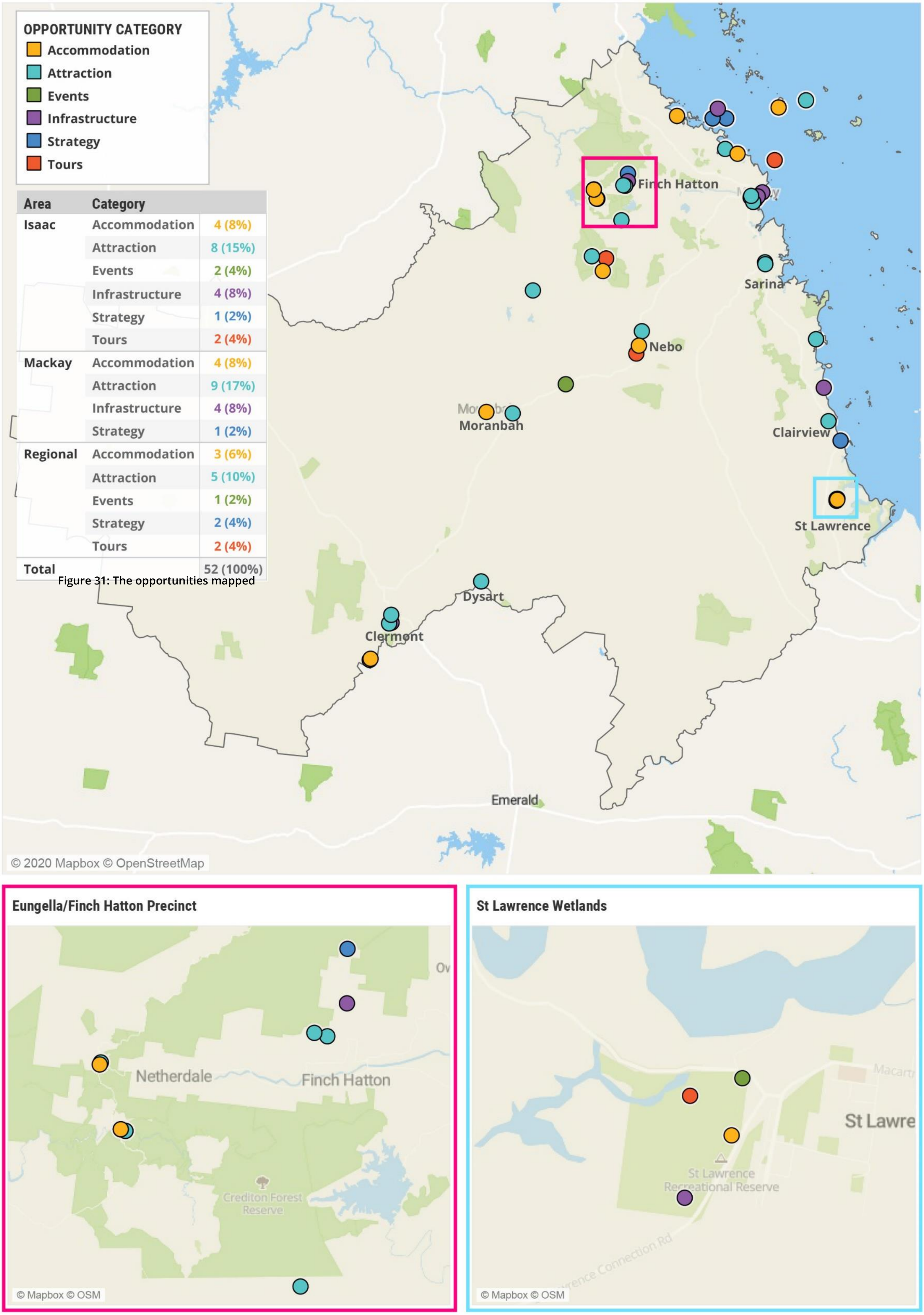
Figure 31 on the following page provides a summary of the geographical dispersal of the recommendations identified and the range of those included.

It illustrates that there are several regional locations where new tourism projects can be introduced, so the economic benefits can be shared throughout the regional economy and not just in Mackay, for example.

As of necessity, many of the recommendations identified are supply-led and are aimed at introducing more commissionable product to Mackay's tourism offering. This is seen as an important requirement to build a far stronger visitor economy and to specifically generate more local visitor economy jobs.

The feasibility of each of the projects identified will need to be tested through more detailed analysis. Top-line feasibility assessments have only been carried out on the top 2 projects to support their consideration.

The sections which follow provide additional detail on the projects identified, including an outline of how projects have been ranked and the rationale for their ranking.



Area	Category	
Isaac	Accommodation	4 (8%)
	Attraction	8 (15%)
	Events	2 (4%)
	Infrastructure	4 (8%)
	Strategy	1 (2%)
	Tours	2 (4%)
Mackay	Accommodation	4 (8%)
	Attraction	9 (17%)
	Infrastructure	4 (8%)
	Strategy	1 (2%)
Regional	Accommodation	3 (6%)
	Attraction	5 (10%)
	Events	1 (2%)
	Strategy	2 (4%)
	Tours	2 (4%)
Total		52 (100%)

Figure 31: The opportunities mapped

6.1.2. The CAPEX required

Figure 32 provides a summary of the estimated CAPEX required to implement each of the opportunities identified.

It demonstrates that public investment is required to support those projects which are important but unable to generate a commercial return and for supporting public infrastructure. Importantly, when one combines purely private sector projects and those parts of public-private partnerships which offer commercial returns on investment, this equates to an estimated 51.7% of estimated capital investment which is attributed to projects which can generate a commercial return and therefore, attract private sector investment sources.

It is important to note that the estimated investment amounts are purely indicative only (unless provided by a project proponent). Therefore, for many projects, the refined capital investment costs will not be known until feasibility studies and business cases are completed, which is the next stage of work required beyond this study.

Most importantly, the analysis indicates that circa 50% of project investment is of a commercial nature and should be able to be attracted from private investment sources.

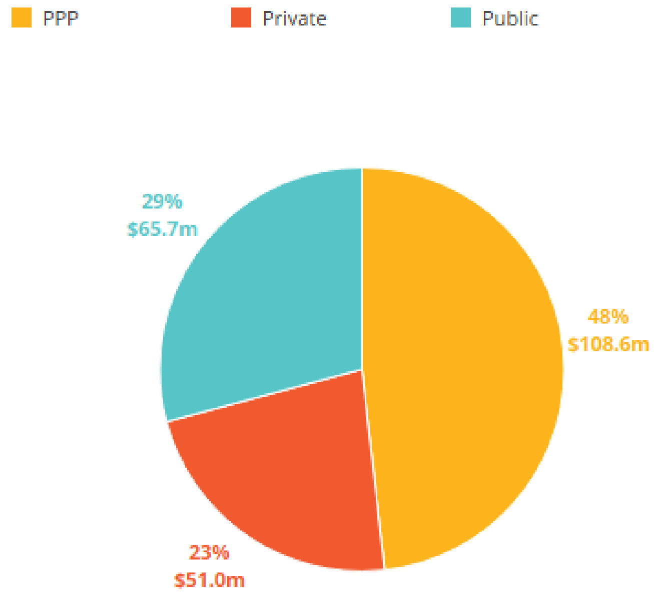
Figure 32: CAPEX summary

CAPEX SUMMARY

Accommodation · Events · Strategy · Total · Attraction · Infrastructure · Tours

Category	PPP		Private	Public	Total
	Private $	Public $	Private $	Public $	
Accommodation	$58.6m 43.0%	$23.0m 16.9%	$47.5m 34.8%	$7.3m 5.4%	$136.4m 100.0%
Attraction	$1.7m 4.4%	$3.7m 9.6%	$3.1m 7.9%	$30.1m 78.2%	$38.6m 100.0%
Events				$115k 100.0%	$115k 100.0%
Infrastructure	$5.2m 10.5%	$16.3m 33.0%		$27.8m 56.4%	$49.3m 100.0%
Strategy	$29.3k 8.2%	$15.8k 4.4%		$310k 87.3%	$355k 100.0%
Tours	$96.0k 16.7%	$24.0k 4.2%	$455k 79.1%		$575k 100.0%
Total	$65.6m 29.1%	$43.0m 19.1%	$51.0m 22.6%	$65.7m 29.2%	$225.3m 100.0%

CAPEX BY INVESTMENT TYPE



CAPEX BY OPPORTUNITY CATEGORY

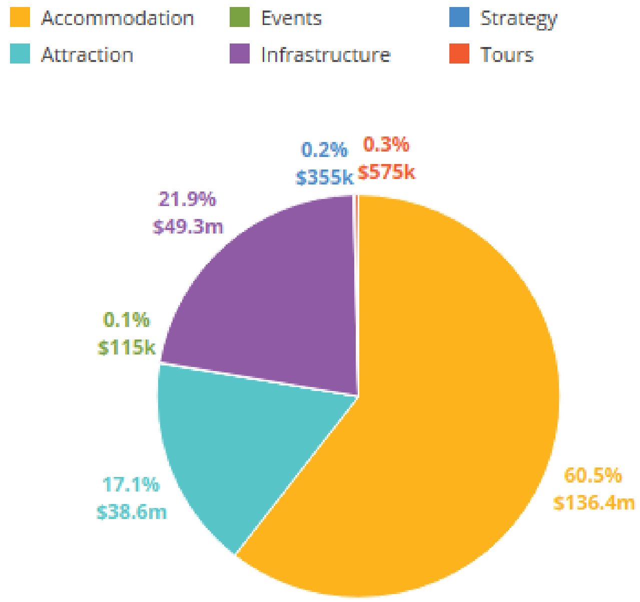


Table 20: CAPEX by project

	Name	PPP		Private	Public	Total
		Private $	Public $	Private $	Public $	
Accommodation	Brampton Island Resort	$21.0m	$9.0m			**$30.0m**
	Eungella Chalet upgrades				$4.0m	**$4.0m**
	Farmstay accommodation			$500k		**$500k**
	Higher end coastal resort (80-120 rooms) with wellness centre/..	$25.2m	$10.8m			**$36.0m**
	Higher-quality, branded destination holiday park			$19.0m		**$19.0m**
	Homevale Homestead B&B development/caravan & camping gr..	$1.1m	$450k			**$1.5m**
	Mackay Highlands Great Walk huts/cabins				$800k	**$800k**
	Moranbah Tourist Holiday Park development				$2.5m	**$2.5m**
	St Lawrence Wetlands eco-accommodation (seasonal or pop-u..	$720k	$80.0k			**$800k**
	Theresa Creek Dam fishing lodge (40-60 rooms)	$10.6m	$2.7m			**$13.3m**
	Wellness/Eco-Adventure lodge (60-80 rooms) at Eungella			$28.0m		**$28.0m**
Attraction	Butterfly house experience				$3.5m	**$3.5m**
	Clermont Historical Centre & Historic Nebo Museum ongoing d..				$200k	**$200k**
	Development of food & agri tourism opportunities	$75.0k	$75.0k			**$150k**
	Development of Peak Ranges cycling route				$45.0k	**$45.0k**
	Eco-adventure cluster (hangliding, abseiling, rock climbing etc.)	$54.0k	$6.0k			**$60.0k**
	Eungella Edge visitor experience centre				$5.0m	**$5.0m**
	Eungella to Homevale National Park mountain biking trail & eve..				$45.0k	**$45.0k**
	Eungella Tree Walk	$900k	$100k			**$1.0m**
	Gold prospecting experience/attraction	$400k	$100k			**$500k**
	Indigenous & South Sea Islander tourism opportunities (e.g. ind..				$4.5m	**$4.5m**
	Isaac region heritage trail				$120k	**$120k**
	Lake to Lake 4WD experience from Eungella to Lake Elphinstone				$45.0k	**$45.0k**
	Meet the maker tours of the Australian Prawn Farm (Illbilbie), a..	$49.5k	$5.5k			**$55.0k**
	Mine tours (tours, viewing platforms, public driver simulation)				$350k	**$350k**
	Mountain bike precinct/hub	$175k	$3.3m			**$3.5m**
	Rail interpretation experience centre				$15.0m	**$15.0m**
	Regional bike track				$125k	**$125k**
	Reopening of trails (walking, 4WD, bird watching) with QPWS				$1.2m	**$1.2m**
	Ultra Coral Australia purpose-built facility with tours	$25.0k	$75.0k			**$100k**
	Underwater Dive Trail (using ex-mining equip, trucks, draglines ..			$3.0m		**$3.0m**
	Wildlife tours viewing (particularly along the Isaac coast) such a..			$55.0k		**$55.0k**
Events	Development of regional food festivals (e.g. cattleman's long lu..				$45.0k	**$45.0k**
	Enhance and grow St Lawrence Wetlands Weekend to destinati..				$35.0k	**$35.0k**
	Reintroduction of Theresa Creek Dam fishing competition				$35.0k	**$35.0k**
Infrastructure	Finch Hatton Gorge Road improvements (all-weather accessibili..				$500k	**$500k**
	Great Barrier Reef Arena & Events Precinct (Harrup Park develo..				$24.2m	**$24.2m**
	Improvement of Isaac's infrastructure & amenity at Council's pr..				$350k	**$350k**
	Mackay Waterfront PDA	$4.0m	$16.0m			**$20.0m**
	Milton Precinct development (business, retail & entertainment ..	$1.2m	$300k			**$1.5m**
	Redevelopment of Clermont Powerhouse Museum as premier ..				$120k	**$120k**
	St Lawrence Wetlands enhancements (boardwalks, platforms, k..				$150k	**$150k**
	Telecommunications infrastructure upgrades (internet & mobile)				$2.5m	**$2.5m**
Strategy	Destination events strategy for Mackay region				$40.0k	**$40.0k**
	Directional & interpretive signage strategy				$200k	**$200k**
	Pioneer Valley & Eungella National Park concept plan				$70.0k	**$70.0k**
	Voluntourism opportunities (Northern Hair-Nosed Wombat, se..	$29.3k	$15.8k			**$45.0k**
Tours	Additional guided recreational fishing/crabbing chartered expe..			$55.0k		**$55.0k**
	Day tours ex Mackay to Cockermouth Island			$200k		**$200k**
	Day tours to Eungella, Pioneer Valley and Finch Hatton			$100k		**$100k**
	Farm/agri tours			$100k		**$100k**
	Guided birdwatching tours at St Lawrence Wetlands	$44.0k	$11.0k			**$55.0k**
	Mt Britton working gold mine tour	$52.0k	$13.0k			**$65.0k**
		$65.6m	**$43.0m**	**$51.0m**	**$65.7m**	**$225.3m**

6.2. THE CATALYST PROJECTS

6.2.1. Determining the catalyst projects

To determine the priority recommendations, each recommendation was assessed against the weighted criteria outlined in Table 21.

A weighted score has been used to reflect that some of the criteria have a stronger positive impact than others.

Where possible, the assessment has utilised quantitative data (particularly for those projects where feasibilities or business cases have been developed). In the absence of such assessments, however, a qualitative assessment has been undertaken based on local knowledge, stakeholder consultation, professional experience and a general assessment of the perceived benefits.

Each project has been given a score for each of the 15 criteria identified.

Table 21: Project ranking criteria

Criteria	Score	Weighting	Description
Estimated CAPEX (Total)	<$100,000 = 1 <$500,000 = 2 <$1,000,000 = 3 >=$1,000,000 = 4	2	The size of investment – both public and private – to develop the project. The larger the investment, the higher the ranking, because of the various economic benefits able to be generated.
Size of Private Investment	<$100,000 = 1 <$500,000 = 2 <$1,000,000 = 3 >=$1,000,000 = 4	3	Projects which are more likely to attract private sector investment (regardless of the value of this investment) are ranked higher.
Size of Public Investment	<$100,000 = 4 <$500,000 = 3 <$1,000,000 = 2 >=$1,000,000 = 1	2	Projects which have a stronger public sector investment requirement are ranked lower.
Private Sector Interest	<30% of CAPEX = 1 <60% of CAPEX = 2 >60% of CAPEX = 3	3	The level of private sector interest (as a percentage of total investment). Those with a stronger proportion of private sector interest are ranked higher.
Ability to Secure Govt. Funding for Project	Limited = 1 Medium = 2 Strong = 3	2	Those projects which may be more likely to be able to secure government funding (capex or opex) are ranked higher.
Requirement for ongoing operational Govt. funding	None = 4 Limited = 3 Medium = 2 Strong = 1	3	If the project is likely to require ongoing government contributions to fund operating costs, it is ranked lower. If the project is likely to be commercially viable/sustainable, it is ranked higher.
Short term to activate	None = 0 Limited = 1 Medium = 2 Strong = 3	3	If the project is likely to be able to be activated in a shorter period, it is ranked higher.
Likelihood to be profiled by TEQ	None = 0 Limited = 1 Medium = 2 Strong = 3	1	The ability of the project to grow the region's destination profile. Projects which may have stronger marketing budgets (particularly those run by larger tourism players), as well as highly unique product, are ranked higher.
Likely visitor appeal	None = 0 Limited = 1 Medium = 2 Strong = 3	2	The projects which are likely to have a stronger appeal to the visitor market are ranked higher than those which may generate lower visitor interest.
Increase profile of the region	None = 0 Limited = 1 Medium = 2 Strong = 3	2	The ability of the project to increase the destination profile of the region. Projects which may come with strong marketing budgets (particularly those operated by larger tourism players), as well as highly unique product, are ranked higher.
Regional dispersal of visitors	None = 0 Limited = 1 Medium = 2 Strong = 3	3	If a project is able to encourage stronger visitor dispersal throughout the region, it is ranked higher.
Uniqueness of Product	None = 0 Locally Unique = 1 Regionally Unique = 2 State-wide Unique = 3 Nationally Unique = 4	1	The uniqueness of the product is ranked according to whether it is unique across Australia (ranked higher), across the region, or whether the product is likely to be unique only to the specific area it is situated in (ranked lower).

Criteria	Score	Weighting	Description
Ability to Grow Visitor Yield	None = 0 Limited = 1 Medium = 2 Strong = 3	3	The ability of the project to increase visitor yield. Projects which are likely to encourage greater overnight stays (particularly in commercial accommodation) and those which introduce commissionable elements are ranked higher.
Estimated visitation once operational	0-500 = 1 501-5,000 = 1 5,001-10,000 = 2 10,001-25,000 = 3 25,000+ = 4	2	Potential estimated visitor numbers to the project once operational.
Employment (Operational) Potential	Less than 5 FTE = 1 5-10 FTE = 1 11-20 FTE= 2 21-50 FTE= 3 More than 50 FTE = 4	2	The level of FTE employment generated once the project is operational.

6.2.2. The results of the weighted ranking

Figure 33 summarises the top 10 projects identified. These projects achieved a top-10 score based on the ranking matrix. It demonstrates there is a range of types of projects identified including accommodation, attractions, infrastructure and tours.

Table 22 on the following page provides the full ranking of the projects based on the total weighted score, followed by Table 23 which provides a more detailed breakdown of the project scores achieved.

Figure 33: The top 10 projects

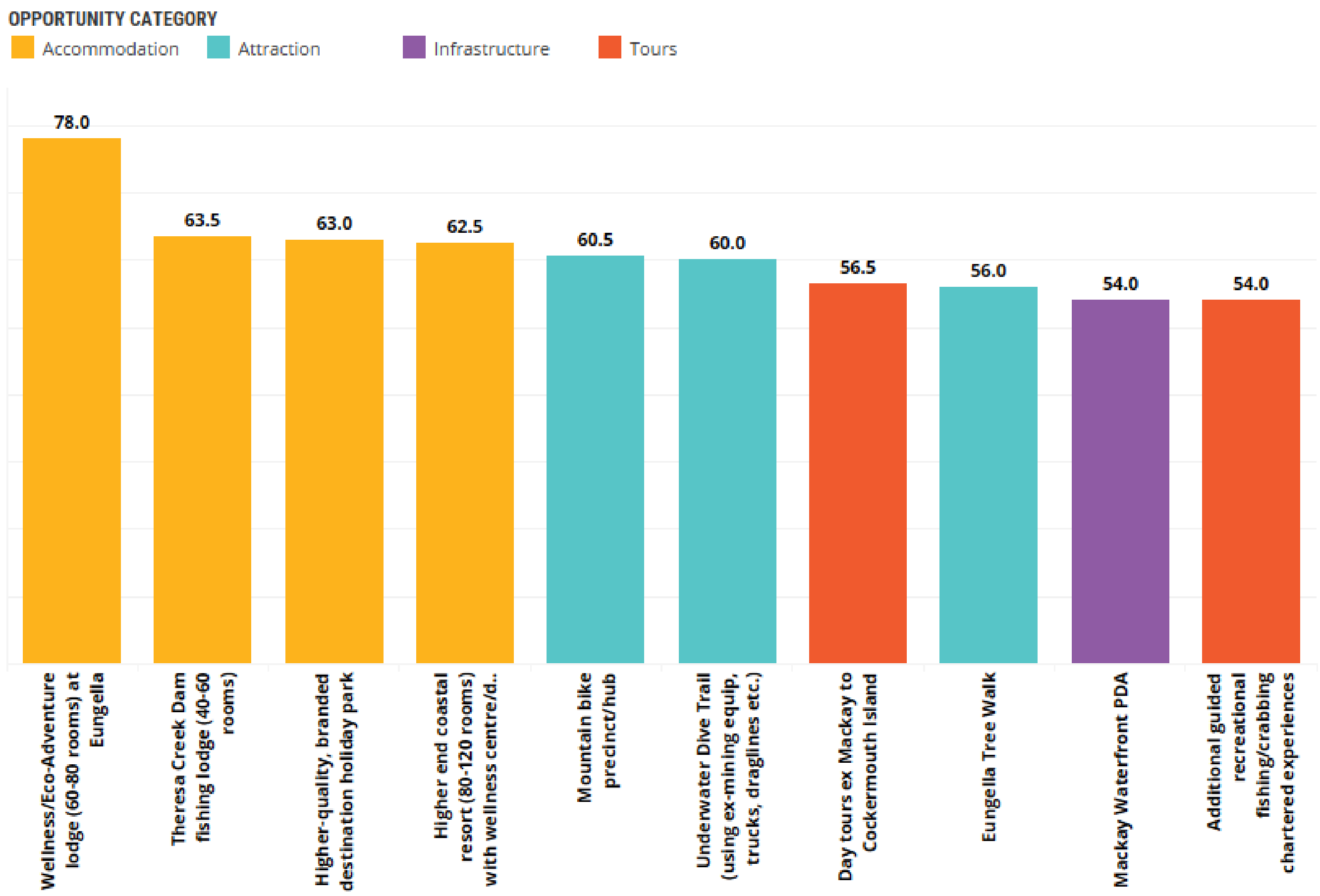


Table 22: Opportunity ranking (based on weighted scores)

OPPORTUNITY CATEGORY

Accommodation | Attraction | Events | Infrastructure | Strategy | Tours

Project #	Name	Weighted Score
2	Wellness/Eco-Adventure lodge (60-80 rooms) at Eungella	78.0
5	Theresa Creek Dam fishing lodge (40-60 rooms)	63.5
3	Higher-quality, branded destination holiday park	63.0
1	Higher end coastal resort (80-120 rooms) with wellness centre/day spa	62.5
13	Mountain bike precinct/hub	60.5
52	Underwater Dive Trail (using ex-mining equip, trucks, draglines etc.)	60.0
45	Day tours ex Mackay to Cockermouth Island	56.5
50	Eungella Tree Walk	56.0
46	Mackay Waterfront PDA	54.0
20	Additional guided recreational fishing/crabbing chartered experiences	54.0
47	Milton Precinct development (business, retail & entertainment hub)	53.0
53	Day tours to Eungella, Pioneer Valley and Finch Hatton	52.0
41	Meet the maker tours of the Australian Prawn Farm (Illbilbie), aquaculture farm tours	52.0
37	Mt Britton working gold mine tour	52.0
6	Farmstay accommodation	52.0
32	Wildlife tours viewing (particularly along the Isaac coast) such as paddle boarding/kayking with dugongs in Clairview	51.5
30	St Lawrence Wetlands eco-accommodation (seasonal or pop-up) e.g. glamping	51.5
34	Development of food & agri tourism opportunities	51.0
28	Gold prospecting experience/attraction	51.0
49	Eco-adventure cluster (hangliding, abseiling, rock climbing etc.)	50.5
11	Farm/agri tours	49.5
33	Voluntourism opportunities (Northern Hair-Nosed Wombat, sea grass watch for Clairview Dugong Sanctuary)	48.5
51	Brampton Island Resort	48.0
43	Ultra Coral Australia purpose-built facility with tours	48.0
19	Indigenous & South Sea Islander tourism opportunities (e.g. indigenous fish trap & nature-based tours)	48.0
9	Homevale Homestead B&B development/caravan & camping grounds	48.0
35	Development of regional food festivals (e.g. cattleman's long lunch, regional beef & beer festival etc.) with strategy	46.5
31	Guided birdwatching tours at St Lawrence Wetlands	45.5
14	Mine tours (tours, viewing platforms, public driver simulation)	42.5
4	Eungella Chalet upgrades	41.5
36	Reintroduction of Theresa Creek Dam fishing competition	41.0
12	Regional bike track	40.5
7	Eungella Edge visitor experience centre	39.0
8	Butterfly house experience	38.5
23	Enhance and grow St Lawrence Wetlands Weekend to destination event status	38.0
38	Eungella to Homevale National Park mountain biking trail & event	36.5
39	Development of Peak Ranges cycling route	36.0
10	Rail interpretation experience centre	36.0
44	Great Barrier Reef Arena & Events Precinct (Harrup Park development)	34.5
29	St Lawrence Wetlands enhancements (boardwalks, platforms, kayak launch points)	34.5
27	Moranbah Tourist Holiday Park development	33.0
18	Pioneer Valley & Eungella National Park concept plan	33.0
17	Directional & interpretive signage strategy	33.0
15	Mackay Highlands Great Walk huts/cabins	33.0
22	Isaac region heritage trail	32.5
40	Lake to Lake 4WD experience from Eungella to Lake Elphinstone	31.0
16	Destination events strategy for Mackay region	31.0
48	Finch Hatton Gorge Road improvements (all-weather accessibility and upgrades)	30.5
42	Redevelopment of Clermont Powerhouse Museum as premier events/arts facility	30.0
21	Reopening of trails (walking, 4WD, bird watching) with QPWS	29.0
25	Improvement of Isaac's infrastructure & amenity at Council's premier campgrounds	27.5
26	Clermont Historical Centre & Historic Nebo Museum ongoing development	26.5
24	Telecommunications infrastructure upgrades (internet & mobile)	25.5

Table 23: Full opportunity matrix results

Project #	Name	Grand Total	Estimated CAPEX (Total) CAT	Size of Private Investmen..	Size of Public Investmen..	Private Sector Interest	Ability to Secure Govt. Fund..	Requirement for ongoing oper..	Likelihood to be profiled by ..	Likely visitor appeal	Increase Profile of Region	Uniqueness of Product	Ability to Grow Visitor Yield	Estimated Visitation Cat	Employment (Operational) Pot..	Regional Dispersal of Visitors	Short term to Activate
2	Wellness/Eco-Adventure lodge (60-80 rooms) at Eungella	78.0	6.0	8.0	6.0	6.0	3.0	8.0	3.0	4.5	4.5	2.0	6.0	4.5	4.5	6.0	6.0
5	Theresa Creek Dam fishing lodge (40-60 rooms)	63.5	6.0	8.0	1.5	6.0	1.5	8.0	3.0	3.0	4.5	1.0	6.0	1.5	1.5	6.0	6.0
3	Higher-quality, branded destination holiday park	63.0	6.0	8.0	6.0	6.0	1.5	8.0	1.0	4.5	1.5	1.0	4.0	4.5	3.0	2.0	6.0
1	Higher end coastal resort (80-120 rooms) with wellness centre/day spa	62.5	6.0	8.0	1.5	6.0	1.5	6.0	2.0	4.5	4.5	2.0	6.0	4.5	6.0	2.0	2.0
13	Mountain bike precinct/hub	60.5	6.0	4.0	1.5	0.0	4.5	4.0	3.0	4.5	4.5	3.0	6.0	3.0	4.5	6.0	6.0
52	Underwater Dive Trail (using ex-mining equip, trucks, draglines etc.)	60.0	6.0	8.0	6.0	6.0	1.5	6.0	3.0	3.0	4.5	3.0	4.0	1.5	1.5	4.0	2.0
45	Day tours ex Mackay to Cockermouth Island	56.5	3.0	4.0	6.0	6.0	3.0	8.0	1.0	4.5	3.0	1.0	6.0	1.5	1.5	4.0	4.0
50	Eungella Tree Walk	56.0	6.0	6.0	4.5	6.0	3.0	6.0	1.0	4.5	1.5	1.0	4.0	3.0	1.5	6.0	2.0
46	Mackay Waterfront PDA	54.0	6.0	8.0	1.5	0.0	3.0	4.0	1.0	4.5	3.0	1.0	6.0	6.0	6.0	2.0	2.0
20	Additional guided recreational fishing/crabbing chartered experiences	54.0	1.5	2.0	6.0	6.0	3.0	8.0	2.0	3.0	3.0	1.0	6.0	3.0	1.5	4.0	4.0
47	Milton Precinct development (business, retail & entertainment hub)	53.0	6.0	8.0	4.5	6.0	1.5	4.0	1.0	1.5	1.5	1.0	2.0	6.0	6.0	2.0	2.0
53	Day tours to Eungella, Pioneer Valley and Finch Hatton	52.0	3.0	4.0	6.0	4.0	3.0	8.0	2.0	3.0	3.0	1.0	4.0	1.5	1.5	4.0	4.0
41	Meet the maker tours of the Australian Prawn Farm (Illbilbie), aquaculture f..	52.0	1.5	2.0	6.0	6.0	3.0	8.0	2.0	3.0	3.0	3.0	4.0	3.0	1.5	4.0	2.0
37	Mt Britton working gold mine tour	52.0	1.5	2.0	6.0	6.0	3.0	8.0	2.0	3.0	4.5	3.0	4.0	1.5	1.5	4.0	2.0
6	Farmstay accommodation	52.0	4.5	6.0	6.0	6.0	1.5	8.0	1.0	1.5	1.5	1.0	2.0	1.5	1.5	6.0	4.0
32	Wildlife tours viewing (particularly along the Isaac coast) such as paddle boa..	51.5	1.5	2.0	6.0	6.0	1.5	8.0	2.0	4.5	3.0	2.0	4.0	1.5	1.5	6.0	2.0
30	St Lawrence Wetlands eco-accommodation (seasonal or pop-up) e.g. glampi..	51.5	4.5	6.0	6.0	6.0	3.0	4.0	2.0	3.0	3.0	1.0	4.0	1.5	1.5	4.0	2.0
34	Development of food & agri tourism opportunities	51.0	3.0	2.0	6.0	4.0	3.0	8.0	2.0	3.0	3.0	1.0	4.0	3.0	3.0	4.0	2.0
28	Gold prospecting experience/attraction	51.0	4.5	4.0	4.5	6.0	3.0	6.0	2.0	3.0	3.0	2.0	4.0	1.5	1.5	4.0	2.0
49	Eco-adventure cluster (hangliding, abseiling, rock climbing etc.)	50.5	1.5	2.0	6.0	6.0	1.5	6.0	2.0	3.0	3.0	1.0	4.0	1.5	3.0	6.0	4.0
11	Farm/agri tours	49.5	3.0	4.0	6.0	6.0	3.0	6.0	1.0	3.0	1.5	1.0	4.0	1.5	1.5	6.0	2.0
33	Voluntourism opportunities (Northern Hair-Nosed Wombat, sea grass watc..	48.5	1.5	2.0	6.0	6.0	3.0	8.0	2.0	1.5	1.5	2.0	4.0	1.5	1.5	4.0	4.0
51	Brampton Island Resort	48.0	6.0	8.0	1.5	6.0	1.5	6.0	1.0	1.5	1.5	0.0	4.0	4.5	4.5	2.0	0.0
43	Ultra Coral Australia purpose-built facility with tours	48.0	3.0	2.0	6.0	0.0	3.0	8.0	2.0	1.5	3.0	3.0	4.0	3.0	1.5	2.0	6.0
19	Indigenous & South Sea Islander tourism opportunities (e.g. indigenous fish ..	48.0	6.0	0.0	1.5	0.0	4.5	4.0	3.0	4.5	4.5	3.0	2.0	6.0	3.0	2.0	4.0
9	Homevale Homestead B&B development/caravan & camping grounds	48.0	6.0	8.0	4.5	6.0	1.5	6.0	1.0	1.5	1.5	1.0	2.0	1.5	1.5	4.0	2.0
35	Development of regional food festivals (e.g. cattleman's long lunch, regional..	46.5	1.5	0.0	6.0	0.0	3.0	4.0	2.0	4.5	3.0	1.0	6.0	4.5	3.0	4.0	4.0
31	Guided birdwatching tours at St Lawrence Wetlands	45.5	1.5	2.0	6.0	6.0	1.5	8.0	2.0	1.5	3.0	1.0	4.0	1.5	1.5	4.0	2.0
14	Mine tours (tours, viewing platforms, public driver simulation)	42.5	3.0	0.0	4.5	0.0	3.0	6.0	2.0	3.0	3.0	3.0	4.0	1.5	1.5	6.0	2.0
4	Eungella Chalet upgrades	41.5	6.0	0.0	1.5	0.0	3.0	8.0	2.0	4.5	1.5	2.0	4.0	1.5	1.5	6.0	0.0
36	Reintroduction of Theresa Creek Dam fishing competition	41.0	1.5	0.0	6.0	0.0	1.5	6.0	2.0	1.5	3.0	1.0	4.0	3.0	1.5	6.0	4.0
12	Regional bike track	40.5	3.0	0.0	4.5	0.0	3.0	4.0	1.0	3.0	3.0	2.0	4.0	1.5	1.5	6.0	4.0
7	Eungella Edge visitor experience centre	39.0	6.0	0.0	1.5	0.0	4.5	2.0	2.0	4.5	3.0	1.0	2.0	3.0	1.5	6.0	2.0
8	Butterfly house experience	38.5	6.0	0.0	1.5	0.0	3.0	6.0	2.0	3.0	3.0	2.0	2.0	4.5	1.5	2.0	2.0
23	Enhance and grow St Lawrence Wetlands Weekend to destination event stat..	38.0	1.5	0.0	6.0	0.0	3.0	4.0	3.0	3.0	4.5	2.0	2.0	1.5	1.5	4.0	2.0
38	Eungella to Homevale National Park mountain biking trail & event	36.5	1.5	0.0	6.0	0.0	3.0	4.0	1.0	1.5	4.5	2.0	2.0	1.5	1.5	6.0	2.0
39	Development of Peak Ranges cycling route	36.0	1.5	0.0	6.0	0.0	3.0	4.0	2.0	1.5	3.0	2.0	2.0	1.5	1.5	6.0	2.0
10	Rail interpretation experience centre	36.0	6.0	0.0	1.5	0.0	3.0	4.0	2.0	3.0	3.0	1.0	2.0	3.0	1.5	4.0	2.0
44	Great Barrier Reef Arena & Events Precinct (Harrup Park development)	34.5	6.0	0.0	1.5	0.0	3.0	2.0	1.0	3.0	3.0	1.0	4.0	4.5	1.5	2.0	2.0
29	St Lawrence Wetlands enhancements (boardwalks, platforms, kayak launch ..	34.5	3.0	0.0	4.5	0.0	3.0	4.0	2.0	3.0	3.0	1.0	2.0	1.5	1.5	4.0	2.0
27	Moranbah Tourist Holiday Park development	33.0	6.0	0.0	1.5	0.0	1.5	8.0	1.0	3.0	1.5	0.0	2.0	3.0	1.5	2.0	2.0
18	Pioneer Valley & Eungella National Park concept plan	33.0	1.5	0.0	6.0	0.0	4.5	8.0	0.0	0.0	0.0	0.0	0.0	1.5	1.5	6.0	4.0
17	Directional & interpretive signage strategy	33.0	3.0	0.0	4.5	0.0	4.5	8.0	0.0	0.0	0.0	0.0	0.0	1.5	1.5	6.0	4.0
15	Mackay Highlands Great Walk huts/cabins	33.0	4.5	0.0	3.0	0.0	3.0	4.0	2.0	1.5	3.0	1.0	2.0	1.5	1.5	4.0	2.0
22	Isaac region heritage trail	32.5	3.0	0.0	4.5	0.0	3.0	4.0	1.0	1.5	1.5	1.0	2.0	1.5	1.5	6.0	2.0
40	Lake to Lake 4WD experience from Eungella to Lake Elphinstone	31.0	1.5	0.0	6.0	0.0	1.5	6.0	1.0	1.5	1.5	1.0	2.0	1.5	1.5	4.0	2.0
16	Destination events strategy for Mackay region	31.0	1.5	0.0	6.0	0.0	4.5	8.0	0.0	0.0	0.0	0.0	0.0	1.5	1.5	4.0	4.0
48	Finch Hatton Gorge Road improvements (all-weather accessibility and upgra..	30.5	4.5	0.0	3.0	0.0	3.0	2.0	1.0	1.5	1.5	1.0	2.0	1.5	1.5	4.0	4.0
42	Redevelopment of Clermont Powerhouse Museum as premier events/arts f..	30.0	3.0	0.0	4.5	0.0	3.0	2.0	1.0	1.5	3.0	1.0	4.0	1.5	1.5	2.0	2.0
21	Reopening of trails (walking, 4WD, bird watching) with QPWS	29.0	6.0	0.0	1.5	0.0	3.0	2.0	1.0	3.0	1.5	0.0	2.0	1.5	1.5	4.0	2.0
25	Improvement of Isaac's infrastructure & amenity at Council's premier camp..	27.5	3.0	0.0	4.5	0.0	3.0	4.0	0.0	0.0	0.0	0.0	2.0	1.5	1.5	4.0	4.0
26	Clermont Historical Centre & Historic Nebo Museum ongoing development	26.5	3.0	0.0	4.5	0.0	3.0	2.0	1.0	1.5	1.5	1.0	2.0	1.5	1.5	2.0	2.0
24	Telecommunications infrastructure upgrades (internet & mobile)	25.5	6.0	0.0	1.5	0.0	3.0	8.0	0.0	0.0	0.0	0.0	0.0	1.5	1.5	2.0	2.0

6.2.3. The priority projects explained

The following sub-sections provide a more detailed explanation of the two priority projects.

6.2.3.1. Project 1 – Wellness & Eco-Adventure lodge at Eungella

The Wellness & Eco-Adventure lodge at Eungella is to be located ideally on the edge of the Eungella Escarpment, overlooking the Pioneer Valley. The location has an attractive national park backdrop, with a number of day walks and overnight trekking options.

It is a desirable location for a wellness and eco-lodge because of its relative isolation though noting it is an easy 1-hour 15-minute drive from Mackay, a 2-hour 7-minute drive from Airlie Beach in the Whitsundays, or 2 hours 40 minutes from Moranbah within the Bowen Basin with major mining companies and sites. As such, the location is ideal for a day visitor or overnight visitor market coming up from Mackay or Airlie Beach, so the location has a wide visitor catchment to market to.

As a wellness and eco-lodge, the facility is suggested to contain elements which will appeal to the following.

- A visitor weekend or overnight market wanting to have a short break and to enjoy the attractive micro-climate which Eungella enjoys.
- A market looking to recuperate and/or enjoy a day spa facility.
- A bushwalking market looking to have a base close to the national park.
- A general rest and relaxation leisure market wanting a location to visit for a short break, a special event etc.
- A small meetings and business market wanting a boutique accommodation to allow for strategy sessions., team building etc.
- A potential wedding market, family special event and related markets wanting an attractive venue to host a facility in.
- A mountain biking enthusiast wanting a hub to base themselves at for accessing the new trail facilities.
- An intrastate and interstate visitor market looking for a unique and alternative type of accommodation and who wants to avoid major urban centres.

Finding a suitable site will be crucial as there is limited private land on the escarpment to allow for such a development. Having a canter levered pool, overwater bar or similar on the edge of the escarpment would reflect the uniqueness of the site and help encourage its market appeal.

6.2.3.2. Project 2 – Theresa Creek Dam Fishing Lodge

Theresa Creek Dam is located 22km south-west of Clermont and is surrounded by several state forest parks. The Dam is 3.5 hours' drive inland from Mackay, 1.5 hours' drive from Moranbah and 1.5 hours (via Cappella) from Emerald.

As a major waterway in the greater region, it offers an important refuge for a variety of birdlife as well as other wildlife and is a hub for recreational boating for a large catchment area.

The Dam is generally well stocked (by the Clermont Fish Stocking Group) with fingerlings offering barramundi, golden perch, saratoga and other fishing options. It is described as the oasis in the outback. There are no vessel restrictions on the Dam, and all watersports are permitted. Camping is currently available at the Dam for a small nightly fee and facilities include toilets, coin-operated gas barbeques, playground, boat ramp and a kiosk (food, drinks, gas and ice).

A 3-3.5-star mid-range fishing lodge is recommended for the site to encourage a variety of visitor markets including the following.

- A broader fishing and boating market.
- An intrastate and interstate visitor market looking for alternative inland routes to travel up through the region and with attractive accommodation.
- A mining sector market looking for an attractive location for recreational pursuits and a place for short and longer breaks without having to drive too far from work and home sites.
- A market looking for a base for exploring the broader region.
- As a hub for regional and state-wide fishing competitions and as part of the "barra trail" of fishing sites.
- As a broader recreational market looking for a relaxing location for kayaking, paddle boarding and other water-based pursuits.
- As a day visitor location for the surrounding local catchment looking for a new place to dine and to relax at.
- As a location for business functions and meetings and forums, especially outside of seasonal fishing seasons.

Finding a suitable location around the dam lake where one can secure a long-term lease would be required. With strict environmental controls, there would be a need for the careful introduction of stormwater, potable water, and wastewater systems to prevent the risk of contamination.

Determination of a specific site would need to be determined in consultation with the Queensland Department of Agriculture and Fisheries which administer the area.

6.3. ANALYSIS OF THE COSTS AND BENEFITS

6.3.1. Capital costs

The following tables provide top-line capital expenditure estimates for the two catalyst projects. Points to note include the following.

- Project 1's total capital cost is estimated at just under **$28.0m**. This is for the development and fit out of a 70-room resort with a wellness centre, dining area as well as a cantilevered bar and outdoor deck.
- Project 2's total capital cost is estimated at just under **$13.3m**, which includes the development and fit out of a 50-room fishing lodge with dining area.
- Both projects include:
  - design and consultancy fees of 8% of capex; and
  - a contingency of 10% of total capex to account for unforeseen costs.
- There has been no provision made for the purchase or leasing of the land. Options for this would need to be investigated further as part of a more detailed feasibility study which can also identify specific sites.
- Higher construction and fit out rates have been applied to Model 1 because of the nature of the facility, being a higher-quality wellness lodge geared to attracting a high spending visitor market.

Table 24: Capital Expenditure Estimates Models 1 & 2

1. Wellness/Eco-Adventure lodge (60-80 rooms) at Eungella	Size (sqm)	Rate (p/sqm)	Total
Construction Estimates M1			
Number of rooms M1	70		
Size of rooms M1	30 sqm		
Total resort room area M1	2,100 sqm	$3,000	$6,300,000
Reception & concierge M1	90 sqm	$3,000	$270,000
Casual brasserie dining/breakfast room M1	192 sqm	$3,000	$576,000
Commercial Kitchen M1	130 sqm	$3,000	$390,000
Toilets M1	50 sqm	$3,000	$150,000
Wellness Centre - Spa M1	200 sqm	$3,000	$600,000
Cantilevered bar and outdoor deck M1	120 sqm	$3,000	$360,000
Circulation area (15%) M1	576 sqm	$3,000	$1,729,200
Construction Estimates Subtotal M1	**3,458 sqm**		**$10,375,200**
Fitout Estimates M1			
Number of rooms M1	70		
Size of rooms M1	30 sqm		
Total resort room area M1	2,100 sqm	$3,500	$7,350,000
Reception & concierge M1	90 sqm	$3,500	$315,000
Casual brasserie dining/breakfast room M1	192 sqm	$3,500	$672,000
Commercial Kitchen M1	130 sqm	$5,000	$650,000
Toilets M1	50 sqm	$3,500	$175,000
Wellness Centre - Spa M1	200 sqm	$3,500	$700,000
Cantilevered bar and outdoor deck M1	120 sqm	$3,500	$420,000
Circulation area (15%) M1	576 sqm	$3,000	$1,729,200
Fitout Estimates Subtotal M1	**3,458 sqm**		**$12,011,200**
Construction and Fitout M1			**$22,386,400**
Site Works M1			**$400,000**
Landscaping & Car Parking M1			**$300,000**
Infrastructure Requirements (all utilities) M1			**$450,000**
Design & Consultancy Fees (8%) M1			**$1,882,912**
Contingency (10%) M1			**$2,541,931**
Total			**$27,961,243**

2. Theresa Creek Dam fishing lodge (40-60 rooms)	Size (sqm)	Rate (p/sqm)	Total
Construction Estimates M2			
Number of rooms M2	50		
Size of rooms M2	25 sqm		
Total lodge room area M2	1,250 sqm	$2,800	$3,500,000
Reception & concierge M2	70 sqm	$2,800	$196,000
Casual brasserie dining/breakfast room M2	168 sqm	$2,800	$470,400
Commercial Kitchen M2	110 sqm	$2,800	$308,000
Toilets M2	50 sqm	$2,800	$140,000
Circulation area (10%) M2	165 sqm	$2,800	$461,440
Construction Estimates Subtotal M2	**1,813 sqm**		**$5,075,840**
Fitout Estimates M2			
Number of rooms M2	50		
Size of rooms M2	25 sqm		
Total resort room area M2	1,250 sqm	$3,000	$3,750,000
Reception & concierge M2	70 sqm	$3,000	$210,000
Casual brasserie dining/breakfast room M2	168 sqm	$3,000	$504,000
Commercial Kitchen M2	110 sqm	$3,500	$385,000
Toilets M2	50 sqm	$3,000	$150,000
Circulation area (10%) M2	165 sqm	$2,500	$412,000
Fitout Estimates Subtotal M2	**1,813 sqm**		**$5,411,000**
Construction and Fitout M2			**$10,486,840**
Site Works M2			**$250,000**
Landscaping & Car Parking M2			**$200,000**
Infrastructure Requirements (all utilities) M2			**$250,000**
Design & Consultancy Fees (8%) M2			**$894,947**
Contingency (10%) M2			**$1,208,179**
Total			**$13,289,966**

6.3.2. Revenue

Table 25 provides the revenue-based assumptions included in each of the Models. Points to note include the following.

- All rates have been inflated by 2% per annum and rounded up.
- Rates have been based on those charged similar accommodation properties around Queensland and Australia.
- Model 1 achieves a higher average achieved room rate because it is proposed as a higher-quality 4-4.5-star experience.
- Restaurant revenue has been split up between guest revenue and casual dining revenue (i.e. those who may use the restaurant but not stay overnight).
- The average spend per meal rates includes spend on food and alcohol.
- Model 1 achieves a higher average spend per meal because it is anticipated to offer a higher-quality dining experience.

Table 25: Revenue Assumptions and Calculations

1	Wellness/Eco-Adventure lodge (60-80 rooms	Year 1	Year 2	Year 3**	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
	Accommodation										
	Average achieved room rate M1	$210	$214	$218	$223	$227	$232	$236	$241	$246	$251
	Accommodation Booking revenue M1	$3,487,575	$3,913,059	$4,390,452	$4,791,740	$4,985,326	$4,983,332	$4,981,339	$4,877,727	$4,776,270	$4,871,795
	Restaurant										
	Average spend p/meal (including drinks) M1	$53	$54	$55	$56	$57	$59	$60	$61	$62	$63
	Restaurant spend - Guests M1	$2,347,193	$2,633,551	$2,954,844	$3,224,917	$3,355,204	$3,353,861	$3,352,520	$3,282,787	$3,214,506	$3,278,796
	Restaurant spend - Non-Guests M1	$193,450	$203,266	$213,562	$224,357	$235,729	$247,641	$260,174	$273,353	$287,203	$301,751
	Restaurant revenue M1	$2,540,643	$2,836,817	$3,168,406	$3,449,274	$3,590,932	$3,601,502	$3,612,694	$3,556,140	$3,501,709	$3,580,547
	Total Revenue M1	**$6,028,218**	**$6,749,876**	**$7,558,858**	**$8,241,014**	**$8,576,258**	**$8,584,834**	**$8,594,032**	**$8,433,867**	**$8,277,978**	**$8,452,342**

2	Theresa Creek Dam fishing lodge (40-60 roor	Year 1	Year 2	Year 3**	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
	Accommodation										
	Average achieved room rate M2	$145	$148	$151	$154	$157	$160	$163	$167	$170	$173
	Accommodation Booking revenue M2	$2,296,945	$2,577,172	$2,891,587	$3,155,878	$3,283,376	$3,282,063	$3,280,750	$3,212,510	$3,145,690	$3,208,604
	Restaurant										
	Average spend p/meal (including drinks) M2	$36	$37	$37	$38	$39	$40	$41	$41	$42	$43
	Restaurant spend - Guests M2	$1,140,552	$1,279,699	$1,435,823	$1,567,057	$1,630,366	$1,629,714	$1,629,062	$1,595,177	$1,561,998	$1,593,238
	Restaurant spend - Non-Guests M2	$65,700	$69,034	$72,512	$76,178	$80,039	$84,104	$88,341	$92,795	$97,477	$102,396
	Restaurant revenue M2	$1,206,252	$1,348,733	$1,508,334	$1,643,235	$1,710,405	$1,713,818	$1,717,403	$1,687,973	$1,659,475	$1,695,633
	Total Revenue M2	**$3,503,197**	**$3,925,905**	**$4,399,922**	**$4,799,113**	**$4,993,781**	**$4,995,881**	**$4,998,152**	**$4,900,483**	**$4,805,165**	**$4,904,237**

6.3.3. Expenditure

Table 26 provides the expenditure-based assumptions for each of the models. Key points to note include the following.

- All expenditure items have been inflated by 2% per annum to reflect CPI.
- The average FTE wage in both models has been set at $65k. This is an average wage and reflects that some staff (i.e. managers) may be paid more and some less based on the type of position they hold.
- Model 1 requires a higher level of staffing (13 FTEs) than Model 2 (10 FTEs) because it is a larger facility (70 rooms compared with 50 rooms). Staffing levels have been held constant across the 10 years assessed.
- Salary on costs have been applied at 25% of total salary costs.
- Utilities and maintenance & cleaning is based on the size of the properties and estimated at $40 per sqm and $15 per sqm respectively.
- Marketing costs are based on a provisional sum of 3.5% of revenue under both models.
- Insurance has been included as a provisional sum of $42k in Model 1 and $24k in Model 2. These rates differ because of the difference in the size/scale of the properties.
- All other expenditure line items are set at similar rates across the two models and are based on monthly estimates.

Table 26: Expenditure Assumptions and Calculations

1	Wellness/Eco-Adventure lodge (60-80 rooms) at Eungella		Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
	Salary Calcs M1											
	FTE Accommodation		8	8	8	8	8	8	8	8	8	8
	FTE Restaurant		7	7	7	7	7	7	7	7	7	7
	FTE wages		$65,000	$65,000	$65,000	$65,000	$65,000	$65,000	$65,000	$65,000	$65,000	$65,000
	Salaries - Accommodation M1		$520,000	$520,000	$520,000	$520,000	$520,000	$520,000	$520,000	$520,000	$520,000	$520,000
	Salaries - Restaurant M1		$455,000	$455,000	$455,000	$455,000	$455,000	$455,000	$455,000	$455,000	$455,000	$455,000
	Oncosts M1	25% of wages	$243,750	$243,750	$243,750	$243,750	$243,750	$243,750	$243,750	$243,750	$243,750	$243,750
	Utilities M1	$40 p/sqm	$138,336	$141,103	$143,925	$146,803	$149,739	$152,734	$155,789	$158,905	$162,083	$165,324
	Equipment M1	$1,000 p/month	$12,000	$12,240	$12,485	$12,734	$12,989	$13,249	$13,514	$13,784	$14,060	$14,341
	Office Expenses M1	$500 p/month	$6,000	$6,120	$6,242	$6,367	$6,495	$6,624	$6,757	$6,892	$7,030	$7,171
	IT/accounting expenses M1	$1,000 p/month	$12,000	$12,240	$12,485	$12,734	$12,989	$13,249	$13,514	$13,784	$14,060	$14,341
	Insurance M1	$3,500 p/month	$42,000	$42,840	$43,697	$44,571	$45,462	$46,371	$47,299	$48,245	$49,210	$50,194
	Maintenance and Cleaning M1	$15 p/sqm	$51,876	$52,914	$53,972	$55,051	$56,152	$57,275	$58,421	$59,589	$60,781	$61,997
	Marketing M1	3.5% of revenue	$210,988	$236,246	$264,560	$288,435	$300,169	$300,469	$300,791	$295,185	$289,729	$295,832
	Restaurant CoGS M1	35% of turnover	$889,225	$992,886	$1,108,942	$1,207,246	$1,256,826	$1,260,526	$1,264,443	$1,244,649	$1,225,598	$1,253,191
	Total Expenditure M1		**$2,581,175**	**$2,715,338**	**$2,865,058**	**$2,992,693**	**$3,059,572**	**$3,069,248**	**$3,079,277**	**$3,059,784**	**$3,041,300**	**$3,081,141**

2	Theresa Creek Dam fishing lodge (40-60 rooms)		Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
	Salary Calcs M2											
	FTE Accommodation		5	5	5	5	5	5	5	5	5	5
	FTE Restaurant		5	5	5	5	5	5	5	5	5	5
	FTE wage		$65,000	$65,000	$65,000	$65,000	$65,000	$65,000	$65,000	$65,000	$65,000	$65,000
	Salaries - Accommodation M2		$325,000	$325,000	$325,000	$325,000	$325,000	$325,000	$325,000	$325,000	$325,000	$325,000
	Salaries - Restaurant M2		$325,000	$325,000	$325,000	$325,000	$325,000	$325,000	$325,000	$325,000	$325,000	$325,000
	Oncosts M2	25% of wages	$162,500	$162,500	$162,500	$162,500	$162,500	$162,500	$162,500	$162,500	$162,500	$162,500
	Utilities M2	$40 p/sqm	$72,512	$73,962	$75,441	$76,950	$78,489	$80,059	$81,660	$83,293	$84,959	$86,659
	Equipment M2	$1,000 p/month	$12,000	$12,240	$12,485	$12,734	$12,989	$13,249	$13,514	$13,784	$14,060	$14,341
	Office Expenses M2	$300 p/month	$3,600	$3,672	$3,745	$3,820	$3,897	$3,975	$4,054	$4,135	$4,218	$4,302
	IT/accounting expenses M2	$500 p/month	$6,000	$6,120	$6,242	$6,367	$6,495	$6,624	$6,757	$6,892	$7,030	$7,171
	Insurance M2	$2,000 p/month	$24,000	$24,480	$24,970	$25,469	$25,978	$26,498	$27,028	$27,568	$28,120	$28,682
	Maintenance and Cleaning M2	$15 p/sqm	$27,192	$27,736	$28,291	$28,856	$29,433	$30,022	$30,623	$31,235	$31,860	$32,497
	Marketing M2	3.0% of revenue	$105,096	$117,777	$131,998	$143,973	$149,813	$149,876	$149,945	$147,014	$144,155	$147,127
	Restaurant CoGS M2	35% of turnover	$422,188	$472,057	$527,917	$575,132	$598,642	$599,836	$601,091	$590,790	$580,816	$593,472
	Total Expenditure M2		**$1,485,088**	**$1,550,544**	**$1,623,589**	**$1,685,803**	**$1,718,237**	**$1,722,640**	**$1,727,171**	**$1,717,214**	**$1,707,718**	**$1,726,750**

6.3.4. Cost benefit assessment

Table 27 provides a summary of the cost benefit results for each model assessed (Table 28 and Table 29 which follow provide the full results of the cost benefit modelling). The cost benefit assessments have been undertaken to provide an indication of potential returns on investment as both are seen as primarily private sector investment initiatives and would need to be able to offer attractive returns to be treated as serious investment opportunities.

The modelling demonstrates the following.

- The required yield has been set at 12.0% to reflect the commercial nature of the project and the region.
- The assumed discount rate (7%) has been determined based on the current cost of capital and applying a standard Treasury discount rate though noting that this would be a private investment development.
- Both models are able to generate a strong positive cash flow position throughout the ten-year forecast cash flow.
- Both models achieve positive internal rates of return (IRR), net present values (NPV) and benefit-cost ratios (BCR).
- The most important metric for private sector investment is the NPV. While both models generate strong, positive NPVs, Model 1's NPV is higher at $27.2m.
- The BCR is a measure that the public sector often uses to demonstrate the relationship between the relative economic costs and benefits of a proposed project. If a BCR is greater than 1.0, it delivers more economic benefits than costs (for example, a BCR of 1.13 as in Model 1 means that the project delivers an average of $1.13 in benefits for every $1.00 invested).
- The reason why the IRR is slightly lower in Model 1 than in Model 3 is because of the higher capital cost involved in establishing the facility.
- The contingency rate applied reflects the pre-concept stage of the project and before any site-specific additional cost requirements may need to be included. It also includes some provision for cost escalation and design contingency factors from now till when the development may be built. The contingency for Model 1 adds an additional $2.6m to the project and for Model 2, $1.2m.

Table 27: Cost Benefit Results Summary

	MODEL 1 Eungella Eco-Lodge	MODEL 2 Thersa Creek Fishing Lodge
Accommodation Guests Y1	22.1k	15.8k
Accommodation Guests Y10	25.9k	18.5k
Accommodation Occupancy Y1	65%	62%
Accommodation Occupancy Y10	76%	72%
Required Yield	12.0%	12.0%
Discount Rate	7.0%	7.0%
Cashflow Y1	$3.4m	$2.0m
Cashflow Y10	$5.4m	$3.2m
CAPEX	$28.0m	$13.3m
IRR	✔ 19.2%	✔ 23.8%
NPV	✔ $27.2m	✔ $19.1m
BCR	✔ 1.13	✔ 1.28

Table 28: Cost Benefit Assessment - Model 1

MODEL 1: WELLNESS/ECO-ADVENTURE LODGE (60-80 ROOMS) AT EUNGELLA

1	Assumptions/Notes	
1.01	Model	1
1.02	Required Yield	12%
1.03	Discount Rate	7%
1.04	Sensitivity Scenario	No Sensitivity
1.05	Sensitivity Multiplier	No Sensitivity

		2023	2024	2025	2026	2027	2028	2029	2030	2031	2032
2	Demand Estimates	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
2.01	Occupancy M1	65%	72%	79%	84%	86%	84%	82%	79%	76%	76%
2.02	Booking Nights M1	17k	18k	20k	22k	22k	21k	21k	20k	19k	19k
2.03	Unique Bookings M1	11k	12k	13k	14k	15k	14k	14k	13k	13k	13k
2.04	Guests p/a (non-unique) M1	33k	37k	40k	43k	44k	43k	42k	40k	39k	39k
2.05	Guests p/a (unique) M1	22k	24k	27k	29k	29k	29k	28k	27k	26k	26k
2.06	Accommodation guest meals M1	44k	49k	54k	57k	58k	57k	56k	54k	52k	52k
2.07	Non-accommodation pax meals M1	3.7k	3.8k	3.9k	4.0k	4.1k	4.2k	4.4k	4.5k	4.6k	4.8k

3	Revenue	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
3.01	Σ Accommodation Booking Revenue	$3,487,575	$3,913,059	$4,390,452	$4,791,740	$4,985,326	$4,983,332	$4,981,339	$4,877,727	$4,776,270	$4,871,795
3.01.01	Accommodation Booking revenue M1	*$3,487,575*	*$3,913,059*	*$4,390,452*	*$4,791,740*	*$4,985,326*	*$4,983,332*	*$4,981,339*	*$4,877,727*	*$4,776,270*	*$4,871,795*
3.02	Σ Restaurant Revenue	$2,540,643	$2,836,817	$3,168,406	$3,449,274	$3,590,932	$3,601,502	$3,612,694	$3,556,140	$3,501,709	$3,580,547
3.02.01	Restaurant spend - Guests M1	*$2,347,193*	*$2,633,551*	*$2,954,844*	*$3,224,917*	*$3,355,204*	*$3,353,861*	*$3,352,520*	*$3,282,787*	*$3,214,506*	*$3,278,796*
3.02.02	Restaurant spend - Non-Guests M1	*$193,450*	*$203,266*	*$213,562*	*$224,357*	*$235,729*	*$247,641*	*$260,174*	*$273,353*	*$287,203*	*$301,751*
	∑ Total Revenue	**$6,028,218**	**$6,749,876**	**$7,558,858**	**$8,241,014**	**$8,576,258**	**$8,584,834**	**$8,594,032**	**$8,433,867**	**$8,277,978**	**$8,452,342**

4	Expenditure	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
4.01	Σ Salaries M1	$975,000	$975,000	$975,000	$975,000	$975,000	$975,000	$975,000	$975,000	$975,000	$975,000
4.01.01	Salaries - Accommodation M1	*$520,000*	*$520,000*	*$520,000*	*$520,000*	*$520,000*	*$520,000*	*$520,000*	*$520,000*	*$520,000*	*$520,000*
4.01.02	Salaries - Restaurant M1	*$455,000*	*$455,000*	*$455,000*	*$455,000*	*$455,000*	*$455,000*	*$455,000*	*$455,000*	*$455,000*	*$455,000*
4.02	Σ Oncosts M1	$243,750	$243,750	$243,750	$243,750	$243,750	$243,750	$243,750	$243,750	$243,750	$243,750
4.03	Σ Utilities M1	$138,336	$141,103	$143,925	$146,803	$149,739	$152,734	$155,789	$158,905	$162,083	$165,324
4.04	Σ Equipment M1	$12,000	$12,240	$12,485	$12,734	$12,989	$13,249	$13,514	$13,784	$14,060	$14,341
4.05	Σ Office Expenses M1	$6,000	$6,120	$6,242	$6,367	$6,495	$6,624	$6,757	$6,892	$7,030	$7,171
4.06	Σ IT/accounting expenses M1	$12,000	$12,240	$12,485	$12,734	$12,989	$13,249	$13,514	$13,784	$14,060	$14,341
4.07	Σ Insurance M1	$42,000	$42,840	$43,697	$44,571	$45,462	$46,371	$47,299	$48,245	$49,210	$50,194
4.08	Σ Maintenance and Cleaning M1	$51,876	$52,914	$53,972	$55,051	$56,152	$57,275	$58,421	$59,589	$60,781	$61,997
4.09	Σ Marketing M1	$210,988	$236,246	$264,560	$288,435	$300,169	$300,469	$300,791	$295,185	$289,729	$295,832
4.10	Σ Restaurant CoGS M1	$889,225	$992,886	$1,108,942	$1,207,246	$1,256,826	$1,260,526	$1,264,443	$1,244,649	$1,225,598	$1,253,191
	∑ Total Expenditure	**$2,581,175**	**$2,715,338**	**$2,865,058**	**$2,992,693**	**$3,059,572**	**$3,069,248**	**$3,079,277**	**$3,059,784**	**$3,041,300**	**$3,081,141**

5	∑ EBITDA	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
		$3,447,044	**$4,034,538**	**$4,693,801**	**$5,248,321**	**$5,516,686**	**$5,515,586**	**$5,514,755**	**$5,374,083**	**$5,236,678**	**$5,371,201**

6	Capital Costs	
6.01	Construction Estimates Subtotal M1	$10,375,200
6.02	Fitout Estimates Subtotal M1	$12,011,200
6.03	Site Works M1	$400,000
6.04	Landscaping & Car Parking M1	$300,000
6.05	Infrastructure Requirements (all utilities) M1	$450,000
6.06	Design & Consultancy Fees (8%) M1	$1,882,912
6.07	Contingency (10%) M1	$2,541,931
	∑ Total CAPEX	**$27,961,243**

	Year 0	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Project Value											**$44,760,011**
Cash Flow	**-$27,961,243**	**$3,447,044**	**$4,034,538**	**$4,693,801**	**$5,248,321**	**$5,516,686**	**$5,515,586**	**$5,514,755**	**$5,374,083**	**$5,236,678**	**$50,131,212**
Estimated IRR (over 10 years)	✔ **19.2%**										
Estimated NPV (over 10 years)	✔ **$27,217,675**										
Estimated BCR (over 10 years)	✔ **1.13**										

Table 29: Cost Benefit Assessment - Model 2

MODEL 2: THERESA CREEK DAM FISHING LODGE (40-60 ROOMS)

1		Assumptions/Notes											
1.01		Model	2										
1.02		Required Yield	12%										
1.03		Discount Rate	7%										
1.04		Sensitivity Scenario	No Sensitivity										
1.05		Sensitivity Multiplier	No Sensitivity										
				2023	2024	2025	2026	2027	2028	2029	2030	2031	2032
2		Demand Estimates		Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
2.01		Occupancy M2		62%	68%	75%	80%	82%	80%	79%	75%	72%	72%
2.02		Booking Nights M2		16k	17k	19k	21k	21k	21k	20k	19k	19k	19k
2.03		Unique Bookings M2		8k	9k	10k	10k	10k	10k	10k	10k	9k	9k
2.04		Guests p/a (non-unique) M2		32k	35k	38k	41k	42k	41k	40k	39k	37k	37k
2.05		Guests p/a (unique) M2		16k	17k	19k	21k	21k	21k	20k	19k	19k	19k
2.06		Accommodation guest meals M2		32k	35k	38k	41k	42k	41k	40k	39k	37k	37k
2.07		Non-accommodation pax meals M2		1.8k	1.9k	1.9k	2.0k	2.1k	2.1k	2.2k	2.2k	2.3k	2.4k
3		Revenue		Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
3.01	Σ	Accommodation Booking Revenue		$2,296,945	$2,577,172	$2,891,587	$3,155,878	$3,283,376	$3,282,063	$3,280,750	$3,212,510	$3,145,690	$3,208,604
3.01.01		Accommodation Booking revenue M2		*$2,296,945*	*$2,577,172*	*$2,891,587*	*$3,155,878*	*$3,283,376*	*$3,282,063*	*$3,280,750*	*$3,212,510*	*$3,145,690*	*$3,208,604*
3.02	Σ	Restaurant Revenue		$1,206,252	$1,348,733	$1,508,334	$1,643,235	$1,710,405	$1,713,818	$1,717,403	$1,687,973	$1,659,475	$1,695,633
3.02.01		Restaurant spend - Guests M2		*$1,140,552*	*$1,279,699*	*$1,435,823*	*$1,567,057*	*$1,630,366*	*$1,629,714*	*$1,629,062*	*$1,595,177*	*$1,561,998*	*$1,593,238*
3.02.02		Restaurant spend - Non-Guests M2		*$65,700*	*$69,034*	*$72,512*	*$76,178*	*$80,039*	*$84,104*	*$88,341*	*$92,795*	*$97,477*	*$102,396*
		∑ Total Revenue		$3,503,197	$3,925,905	$4,399,922	$4,799,113	$4,993,781	$4,995,881	$4,998,152	$4,900,483	$4,805,165	$4,904,237
4		Expenditure		Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
4.01	Σ	Salaries M2		$650,000	$650,000	$650,000	$650,000	$650,000	$650,000	$650,000	$650,000	$650,000	$650,000
4.01.01		Salaries - Accommodation M2		*$325,000*	*$325,000*	*$325,000*	*$325,000*	*$325,000*	*$325,000*	*$325,000*	*$325,000*	*$325,000*	*$325,000*
4.01.02		Salaries - Restaurant M2		*$325,000*	*$325,000*	*$325,000*	*$325,000*	*$325,000*	*$325,000*	*$325,000*	*$325,000*	*$325,000*	*$325,000*
4.02	Σ	Oncosts M2		$162,500	$162,500	$162,500	$162,500	$162,500	$162,500	$162,500	$162,500	$162,500	$162,500
4.03	Σ	Utilities M2		$72,512	$73,962	$75,441	$76,950	$78,489	$80,059	$81,660	$83,293	$84,959	$86,659
4.04	Σ	Equipment M2		$12,000	$12,240	$12,485	$12,734	$12,989	$13,249	$13,514	$13,784	$14,060	$14,341
4.05	Σ	Office Expenses M2		$3,600	$3,672	$3,745	$3,820	$3,897	$3,975	$4,054	$4,135	$4,218	$4,302
4.06	Σ	IT/accounting expenses M2		$6,000	$6,120	$6,242	$6,367	$6,495	$6,624	$6,757	$6,892	$7,030	$7,171
4.07	Σ	Insurance M2		$24,000	$24,480	$24,970	$25,469	$25,978	$26,498	$27,028	$27,568	$28,120	$28,682
4.08	Σ	Maintenance and Cleaning M2		$27,192	$27,736	$28,291	$28,856	$29,433	$30,022	$30,623	$31,235	$31,860	$32,497
4.09	Σ	Marketing M2		$105,096	$117,777	$131,998	$143,973	$149,813	$149,876	$149,945	$147,014	$144,155	$147,127
4.10	Σ	Restaurant CoGS M2		$422,188	$472,057	$527,917	$575,132	$598,642	$599,836	$601,091	$590,790	$580,816	$593,472
		∑ Total Expenditure		$1,485,088	$1,550,544	$1,623,589	$1,685,803	$1,718,237	$1,722,640	$1,727,171	$1,717,214	$1,707,718	$1,726,750
5		∑ EBITDA		$2,018,109	$2,375,361	$2,776,333	$3,113,310	$3,275,544	$3,273,241	$3,270,981	$3,183,269	$3,097,447	$3,177,486
6		Capital Costs											
6.01		Construction Estimates Subtotal M2	$5,075,840										
6.02		Fitout Estimates Subtotal M2	$5,411,000										
6.03		Site Works M2	$250,000										
6.04		Landscaping & Car Parking M2	$200,000										
6.05		Infrastructure Requirements (all utilities) M2	$250,000										
6.06		Design & Consultancy Fees (8%) M2	$894,947										
6.07		Contingency (10%) M2	$1,208,179										
		∑ Total CAPEX	$13,289,966										
		Project Value											$26,479,054
		Cash Flow	-$13,289,966	$2,018,109	$2,375,361	$2,776,333	$3,113,310	$3,275,544	$3,273,241	$3,270,981	$3,183,269	$3,097,447	$29,656,540
		Estimated IRR (over 10 years)	✓ 23.8%										
		Estimated NPV (over 10 years)	✓ $19,139,431										
		Estimated BCR (over 10 years)	✓ 1.28										

6.4. FUNDING STREAMS AND PARTNERSHIPS

6.4.1. Local, State and Federal soft and hard infrastructure grants

Pre-COVID–19, several funding grants were made available from the Queensland State Government primarily and sometimes supported through Federal grant programs for project infrastructure. Much of this has tended to be focused on public projects however which have accessed funding through programs such as Building our Regions Program amongst others.

The impact of COVID-19 government recovery programs at both State and Federal levels has significantly changed the landscape on funding grants and priorities. Nevertheless, we note that on 20th May 2020 the Queensland Premier has announced a $50m fund for tourism, though funding guidelines have still to be developed.

Stafford's research, however, does indicate that State Government is keen to encourage "shovel ready tourism projects" and especially those which can generate construction sector jobs along with ongoing operational jobs once the venture is developed. Projects which are also likely to act as catalysts to support other projects being activated will likely be viewed as higher priority as well. This is important to note as the two priority projects identified for this study are able to support construction phase and operational phase employment and both would be catalyst projects to encourage other development and investment to occur.

For the priority projects such as Wellness & Eco-Adventure lodge at Eungella and Theresa Creek Dam Fishing Lodge, the ability to get infrastructure to the edge of both sites is going to be particularly important for helping to find interested investors. This means infrastructure support in the form of:

- supply of potable water;
- stormwater systems;
- sewer systems;
- telecommunications and Wi-Fi services; and
- road access if and where required.

This also provides government with an excellent opportunity to introduce sustainable forms of greywater recycling for landscape watering, laundry services and showering along with encouraging sustainable forms of energy (solar etc.) and the use of green building technology.

For Eungella Wellness and Eco-Lodge, there is the ability of Government to also support the adjoining Eungella National Park including greater public access and use of facilities. Eungella National Park is located on an isolated massif about 80 km west of Mackay. The Eungella Plateau rises to 1259m at Mt Dalrymple and to a similar elevation at Mt William, forming part of the Clarke Range. The rainforests of the Eungella massif represent one of the most isolated patches of this vegetation type in Australia. The rainforest is bordered by eucalypt forests and woodlands across much of its extent. In 1986 the National Park was extended to include land at Mt Beatrice and a small area of former State Forest near Finch Hatton so that today the park encompasses 52,900 ha.

Though not a World Heritage Site, Eungella is considered to be the longest continual stretch of sub-tropical rainforest in Australia and is known for its platypuses which are increasingly hard to find in natural settings throughout Australia.

The eco focus of the proposed lodge also can support State Government programs to encourage greater education and learning of both fauna and flora and potentially the development of a national park visitor experience centre at Eungella, to help reinforce the attributes and uniqueness of the area.

There are, therefore, a variety of ways in which State Government especially may be able to support ways to activate Eungella as an important wider regional visitor precinct, and specifically via working with Mackay Regional Council, MTL and potential investors, in the Wellness and Eco Lodge being proposed as a priority project.

The Theresa Creek Dam Fishing Lodge project will also require solid support from State Government to allow for an appropriate lease within the site for the fishing lodge. The marketability of the fishing lodge would be significantly compromised if it had to be located outside of the area. It needs to be onsite to be viable. Though the site is managed by the Department of Agriculture and Fisheries, the lease for a fishing lodge is likely to also require the involvement and approval of the Queensland Department of Natural Resources, Mines and Energy. Support in navigating the process through State Government to establish appropriate lease provisions will be important. It is hoped that key agencies such as the Department of Innovation and Tourism Industry Development may be able to play a facilitation role to help establish the lease arrangement for a potential private investor for the fishing lodge.

A State Government inter-agency approach to delivering the desired outcome for this fishing lodge project is therefore essential if this project can be activated in a realistic timeframe and become shovel ready. As there are already camping facilities at Theresa Creek Dam the potential will also exist to upgrade associated infrastructure including waste management, sewer system, potable water etc.

6.4.2. Partnerships with the government to seed fund investment

Each of the various tourism investment opportunities will require concept development and a feasibility study/business case to ensure project proponents have determined correct capital investment levels, realistic operating costs and market demand forecasting. MTL, as the regions peak tourism industry body, could look to partnership opportunities with the Council and State Government to facilitate the investment process required. As MTL has strong local knowledge on the visitor economy and tourism investment requirements, it is ideally positioned to lead in this activity.

To help achieve this, consideration should be given by MTL to create an operating arm of its current structure focused on the following.

- Developing product concepts into investment packages for presenting to potential operators and investors locally, regionally and potentially nationally (taking a strong proactive approach).
- Facilitating the development of tourism projects through the funding of concept development and feasibility studies so stronger investor/developer interest can be secured and in faster time frames.
- Working with State Government agencies such as the Department of Innovation and Tourism Industry Development, Economic development Qld and local councils to develop a mechanism for jointly funding feasibility and business case development for priority tourism projects. This will allow MTL to access funding to support feasibility studies to illustrate their viability.
- MTL should then look to develop an investment prospectus which can outline the priority tourism investment projects which are needed for the Mackay region and to allow for this to be updated regularly as new projects get identified and existing projects start to get activated.
- For MTL to work with local councils and state government to facilitate a regular tourism investment forum (which might be stand-alone or could possibly be as a subset of general investment facilitation into the Mackay region) so that the desire for new investment is regularly kept front of mind of industry operators, developers and investors.

The key component for MTL would be to have access for funding to cover feasibility study and business case costs so that potentially 3-6 projects could be introduced per annum and ranging from smaller to medium-sized tourism projects and potentially clusters of projects where tourism precincts may be possible.

An example of a cluster could be the development of various projects within the Eungella/Pioneer Valley area which could offer commercial accommodation, activity and experience attractions such as treetop walkways and mountain biking circuits, improved visitor information facilities and related public infrastructure to support commercial development opportunities.

MTL should ideally be the facilitator for any new tourism and related precincts or hubs so its product expertise can be used to guide sensible and workable outcomes including maintaining the ongoing support of local operators.

6.5. DEVELOPMENT OF TOUR PRODUCT

The research and modelling of the various tourism investment opportunities has identified that the new commercial accommodation products are rated highly, though there are a number of tours which also rate strongly. We note that the Mackay region is lacking in tour product with very limited existing products to promote. As such, and to help encourage the tour product to establish, we have listed the process to follow and for which MTL needs to be leading in.

In simple terms, its important that the following approach is adopted to help secure tour product investors:

- MTL needs to agree to prioritise projects and the rating model created by Stafford for MTL offers an objective way of selecting tour products. What also need to be remembered is that dependent on different forms of government support, priorities may change every 12-24 months so it's important to liaise regularly with TEQ and DTITD on a regular basis, to check for changing priorities and project support being offered.
- MTL needs to develop a scoping document for a feasibility study for a project to develop specific tour product. The scoping document is the description of the concept which needs to then be tested and refined through a feasibility study.
- MTL would then need to go out to market with a short expression of interest (EOI) and we suggest to a short list of skilled consultants, to obtain a quote for a feasibility study subject to securing grant funding.
- MTL needs to apply separately to local councils, economic development agencies and state government to request grant funding for a feasibility study. Through our experience, a typical feasibility budget for such a project should be in the range of $25k-$40k dependent on how complex it is and the components of the tour.
- MTL then needs to manage the contract for the feasibility study which will usually require 5-8 weeks to complete. We

would suggest that a key criteria for the feasibility study is for the consultant to identify 3-4 existing tour companies in Queensland particularly to actually go and test the core components of the project with. It is important that the consultant gathers tour operator feedback on what the tour would need by way of support to be commercially viable, how the product could be de-risked to support the investment required, and to clarify if the tour product is seasonal or year round.

- The feasibility study outcomes are important to help support what a viable tour product would need to be like. Provided the feasibility study is able to show a positive financial result can be achieved, MTL would then need to distribute the feasibility study to the economic development unit of the local council, DITID, potentially local real estate agents and where applicable key state and national real estate agents who often also are in the business of selling ventures, local investors and developers, business branches of local banks, owners of similar facilities elsewhere in the state and Australia wide.
- If MTL was developing a number of product development opportunities to take to market, it is suggested that it create a tourism development prospectus, which can contain tour products amongst others. This can then be used for emailing out to intermediaries and interested parties, along with presenting at tourism investment forums which MTL in partnership with other agencies may facilitate in Brisbane and possibly Sydney and Melbourne.
- MTL should also look to develop and implement a publicity campaign which should contain a section on the MTL website dedicated to new tourism investment opportunities.
- MTL would then need to follow up leads and meet with potential developers and operators. Part of the support for interested parties should include providing a list of contacts in the area of the project such as council personnel, main roads and other relevant parties whose consent may be required.

6.5.1. Case Study

An example of a successful process undertaken is the following.

Bundaberg North Burnett Tourism (the RTO) identified a project from their destination tourism plan as a priority. It was a day trip from Bundaberg to the Great Barrier Reef's Lady Musgrave Island.

The project was scoped out and a proposal for a quote on a feasibilty study was developed. Bundaberg Regional Council, through their economic development section agreed to fund the feasibility study. The study, carried out by Stafford Strategy, identified that the service would be feasible under certain conditions.

Contact was made with a large number of state and commonwealth agencies, vessel operators through Australia, local marina owners and the Port of Bundaberg advising them that a feasibility study had been carried out and that the service was viable.

The Port of Bundaberg understood that a day trip service to the Great Barrier Reef was a key component of their business plan and developed an expression of interest document that was distributed to their contacts and also ran a PR campaign to attract interested parties.

A suitable operator was found and a team assisted the potential operator with key contacts to enable the project to proceed.

The project has been a real success with the proposed operation going from five days a week to daily. A second larger boat has been bought and a live aboard underwater pontoon built. The operation also does whale watching in season and dives on the HMAS Tobruk.

The key lesson learnt was the need for a robust feasibility study to take to market, and once an investor and operator was identified, to work closely with the operator to ensure the approval process was smooth and implementation successful.

SITE MASTER PLANNING

Various tourism investment opportunities have been identified in areas which provide the potential to cluster new tourism products together including commercial accommodation development, day tours and visitor experiences and attractions.

To support the various investment opportunities and to assist with their activation in realistic timeframes, consideration should be given to creating two master plans initially to support:

- The cluster of products and opportunities at Eungella National Park, Pioneer Valley and Finch Hatton Gorge which offer food, mountain biking and nature based experiences; and
- The cluster of products and opportunities at Cape Hillsborough which offer wildlife, history and cultural experiences along with walking trails etc.

Master planning for both of these areas will ensure that both areas develop as highly sustainable and well planned destinations for tourism and allow for infrastructure support such as car and coach parking, interpretative signage and wayfinding, etc.

A master planned approach will also assist in visitor management and integrating ways to manage visitor flows especially at peak times of the day to ensure a high quality experience is generated.

Importantly, a master planned approach will also help identify ways to extend commissionable tourism product over time, as the regions currently have a heavy focus on free rather than charge for experiences. This is important if tour based products are to be developed over time, as the region is currently heavily focussed toward a self drive market.

MTL should be the facilitator for securing funding for these two master plans with funding partnership assistance being sort from councils and state government. Over time, other site master plans should be investigated but only once other product clusters have been determined and after these two initial master plans have been completed.

MTL INVESTMENT FACILITATION

Each of the various tourism investment opportunities will require concept development and a feasibility study/business case to ensure project proponents have determined correct capital investment levels, realistic operating costs and market demand forecasting. MTL, as the regions peak tourism industry body, could look to partnership opportunities with the Council and State Government to facilitate the investment process required. As MTL has strong local knowledge on the visitor economy and tourism investment requirements, it is ideally positioned to lead in this activity.

To help achieve this, consideration should be given by MTL to create an operating arm of its current structure focused on the following.

- Developing product concepts into investment packages for presenting to potential operators and investors locally, regionally and potentially nationally (taking a strong proactive approach).
- Facilitating the development of tourism projects through the funding of concept development and feasibility studies so stronger investor/developer interest can be secured and in faster time frames.
- Working with State Government agencies such as the Department of Innovation and Tourism Industry Development, Economic Development Queensland, and local councils to develop a mechanism for jointly funding feasibility and business case development for priority tourism projects. This will allow MTL to access funding to support feasibility studies to illustrate their viability.
- MTL should then look to develop an investment prospectus which can outline the priority tourism investment projects which are needed for the Mackay region and to allow for this to be updated regularly as new projects get identified and existing projects start to get activated.
- For MTL to work with local councils and state government to facilitate a regular tourism investment forum (which might be stand-alone or could possibly be as a subset of general investment facilitation into the Mackay region) so that the desire for new investment is regularly kept front of mind of industry operators, developers and investors.

The key component for MTL would be to have access for funding to cover feasibility study and business case costs so that potentially 3-6 projects could be introduced per annum and ranging from smaller to medium-sized tourism projects and potentially clusters of projects where tourism precincts may be possible.

MTL should ideally be the facilitator for any new tourism and related precincts or hubs so its product expertise can be used to guide sensible and workable outcomes.

We have outlined in section 6.5 specific steps which MTL should look to undertake to secure new tour products as we note that the region is lacking in tour product especially and we offer a case study example to illustrate how it worked successfully.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7. RISK ASSESSMENT

All investment projects come with a variety of risks. The following offers risk elements which need to be considered and why, in the current economic climate, government involvement in risk mitigation is essential. The risks identified are not intended to offer a total comprehensive list but rather, the key risks for consideration and addressing where possible.

7.1. RISK IDENTIFICATION

Across the 53 potential tourism investment projects identified, there are a number of common investment risks and of course a variety of unique ones, often relating to accessing sites, getting approvals from third parties, etc.

The key risks identified are noted as follows, and not in priority order:

- The challenge for many in securing finance for a greenfield project and with banks and other financial institutions being more risk-averse now
- Finding development sites which can be purchased or leased
- The ability to secure infrastructure such as sewer connections, potable water, stormwater systems, telecommunications and the cost of getting these to the site for development
- Accessibility including road access, links to airports or more remote airstrips, boat access
- Government planning processes and the time it can take to secure development applications
- Site restrictions imposed by various State Government agencies due to environmental or other factors
- Finding and securing trained staff for tourism ventures including chefs, kitchen staff, front of house etc.
- The ability to address seasonality impacts as for many regions there are distinct high, shoulder and low seasons so finding different markets to fill tour and room capacity all year round is essential for cash flow management
- The escalation in construction costs from the early planning stage of projects through to the letting of contracts
- Changes in visitor markets and demand
- Competition and the risk of aggressive pricing to force viability down
- Changes in market conditions as preferences can change over time which may necessitate modifying products and services
- Changes in government policy support for tourism and related development at all levels of government
- Natural disasters (force majeure) such as floods, cyclones, droughts, bush fires.

7.2. RISK MITIGATION

Table 30 provides ways to help mitigate some of these risks.

Table 30: Risk Mitigation Matrix

Risks	Mitigation Measures	By Whom
Securing finance for a greenfield tourism project	A robust feasibility study and business case is essential with solid market demand forecasts which are realistic. There are various investors looking around for new project opportunities so the option of finding investment partners should not be discounted as bringing equity funding is highly desirable	By the project proponent and potentially with the assistance of government to show support for the project as well, even if its in the form of funding for feasibility analysis and some infrastructure
Finding development sites	MTL and/or councils identifying potential sites which ideally are already zoned fit for purpose. If not, some preliminary work to help expedite zoning for tourism is a good value add	MTL and with the support and involvement of councils and potentially relevant state govt. agencies if on crown land
Ability to secure infrastructure	MTL working with councils and project proponents to determine infra gaps and cost-effective options for addressing this Finding a government funding mechanism to provide infra requirements to help in de-risking the project	MTL, councils and project proponent

Risks	Mitigation Measures	By Whom
	Where possible master plan sites where a number of products can be clustered together and where they can leverage off the same infrastructure elements	
Accessibility including road access	Identifying road access upgrades etc required, potential links to airstrips and airports and other transport modes. Ensuring that signage and wayfinding to the new site(s) is also covered	MTL and councils with state govt. agencies where required
Government planning processes	Ensuring the tourism project(s) is seen as a high priority and a more flexible planning interpretation is offered to avoid unnecessary delay. Where possible master plan sites where a number of tourism products can be clustered together and where they can leverage off the same infrastructure elements Where possible having projects of a certain scale and economic benefit classified as state significant and worthy of fast-tracking	MTL and councils MTL and councils Having State Govt. help fast track projects where they are clearly shown to be important economic drivers for employment, investment and regional dispersal
Site restrictions imposed by various State Government agencies	Finding an advocate agency in State Govt. who can work within the system to find pathways through the processes Where possible master plan sites where a number of tourism products can be clustered together and where they can leverage off the same infrastructure elements Advising State govt. on where site blockages may exist and offering solutions which are sustainable and responsible	MTL and project proponent fronting to key agencies such as DITITD MTL and project proponents
Finding and securing trained staff	Identifying staffing needs and finding locations for accessing staff Working with tourism training institutions to see potential staff in the training pipeline Working with relevant state govt. training and education agencies to help identify staff sources	MTL and project proponents MTL and project proponents State govt. education agencies to provide guidance on pathways to secure staff
The ability to address seasonality impacts	Robust market demand analysis as part of the project feasibility study and business case to determine seasonal markets to attract and strategies Where possible master plan sites where a number of tourism products can be clustered together and where they can leverage off the same infrastructure elements and help address seasonality impacts collectively	MTL and project proponents MTL, State Government and councils
An escalation in construction costs	Ensuring a sufficient contingency factor to cover escalation costs based on project timing and changes to project scope Ensuring project build contracts are focused on fixed-rate quotes if cost-effective	MTL and project proponents Project proponent and legal adviser
Changes in visitor markets and demand	Robust market demand analysis as part of the project feasibility study and business case to determine markets trends and likely risk of changes	MTL and project proponents
Competition	A competitor strategy within the business case to ensure the project had a USP and could compete on both value and price.	MTL and project proponents

Risks	Mitigation Measures	By Whom
	Making sure the development was unique enough to avoid direct competition with an existing similar venture	MTL and project proponents
Changes in market conditions	Robust market demand analysis as part of the project feasibility study and business case to determine markets trends and likely risk of changes	MTL and project proponents
Changes in government policy support	Ensuring the projects(s) can be viable without government support. If government policy changes in their level of support for tourism ii is essential for RTOs and industry to take a proactive approach to encourage a supportive approach to tourism and to advocate for this	MTL and project proponents MTL, TEQ, QTTIC, TTF and industry stakeholders and operators
Natural disasters (force majeure)	The feasibility study needs to plan to ensure development sites minimise the risk to the development from as many natural disasters as practically possible	Specialist advisers for the feasibility and business case development

8. APPENDICES

Appendix 1 Accommodation Audit

Table 31: Full Accommodation Audit Findings

Type	Name	Rooms
Mining Accommodation	Civeo Coppabella Village	3,048
Mining Accommodation	Civeo Dysart Village	1,798
Mining Accommodation	Civeo Moranbah Village	1,200
Mining Accommodation	Civeo Middlemount Village	800
Mining Accommodation	QCV Sarina	600
Mining Accommodation	Moranbah BMA SPV	567
Mining Accommodation	Leichardt Accommodation Village	540
Mining Accommodation	Civeo Nebo Village	490
Mining Accommodation	Stayover in Dysart	410
Mining Accommodation	Coal Country Caravan Park	300
Mining Accommodation	Nebo Junction Accommodation Village	300
Mining Accommodation	Terowie Village Camp Accommodation	248
Mining Accommodation	North Goonyella Accommodation Village	200
Hotels	ibis Mackay	152
Motels	Smart Stay Villages Moranbah	146
Hotels	Oaks Mackay Rivermarque Hotel	138
Serviced Apartments	Quest Mackay on Gordon	115
Mining Accommodation	Glenden Blackdown Accommodation Services	100
Serviced Apartments	Quest Mackay MacAlister St	96
Hotels	Rydges Mackay Suites	90
Motels	Coral Cay Resort Motor Inn	82
Motels	The Villages Alligator Creek	80
Resorts	Vitrinite Village of Middlemount	80
Serviced Apartments	Direct Hotels - Pacific Sands	80
Hotels	Mantra Mackay	79
Motels	Isaac Motel Moranbah	69
Serviced Apartments	Lanai Riverside Apartments Mackay Accommodation	65
Serviced Apartments	Riviera Mackay	64
Resorts	Kohuna Beachside Resort	60
Hotels	Oaks Mackay Carlyle Suites	59
Hotels	Mackay Oceanside Central Hotel	57
Hotels	Direct Hotels - Monterey Moranbah	51
Motels	Jolly Collier Hotel Motel	51
Motels	Country Roads Motor Inn Dysart	50
Motels	Western Heritage Motor Inn	50
Resorts	Dolphin Heads	50
Motels	Swag Motel Middlemount	48
Motels	Coral Sands Motel	47
Hotels	Ocean International Hotel	46
Motels	Windmill Motel and Reception Centre	42
Holiday Parks/Caravan Parks	Mycow Bakers Creek Caravan Park	40
Motels	Alara Motor Inn	40
Motels	Mackay Resort Motel	40
Motels	Best Western Marco Polo Mackay	38
Motels	Country Plaza Motor Inn	38
Motels	White Lace Motor Inn	37
Resorts	Illawong Beach Resort	37
Motels	Reef Resort Motel	36
Motels	Shakespeare Motel	36
Resorts	Reef Resort	36
Serviced Apartments	Mackay Seabreeze Apartments	36

Type	Name	Rooms
Motels	Tropic Coast Motel	35
Resorts	Ocean Resort Village	34
Motels	Mid City Motor Inn	33
Motels	Blue Ribbon Motor Inn	32
Motels	Sun Plaza Motel	32
Motels	Drovers Rest	31
Motels	Moranbah Motor Inn	31
Holiday Parks/Caravan Parks	BIG4 Mackay Marine Tourist Park	30
Pub Accommodation	Hay Point Hotel Motel	30
Pub Accommodation	Nebo Hotel	30
Serviced Apartments	Oaks Moranbah Suites	30
Motels	Miners Lodge Motor Inn	29
Motels	Rover Holiday Units	29
Motels	Rover Motel	29
Serviced Apartments	Smart Stayzzz Inns	29
Motels	Black Nugget Hotel Motel	28
Resorts	Comfort Resort Blue Pacific	28
Serviced Apartments	Oaks Middlemount Suites	27
Motels	Mackay Rose Motel	26
Motels	Shamrock Gardens Motel	26
Holiday Parks/Caravan Parks	Andergrove Van Park	25
Holiday Parks/Caravan Parks	Central Tourist Park Mackay	25
Motels	Clermont Country Motor Inn	25
Holiday Parks/Caravan Parks	Halliday Bay Resort and Golf Course and RV Park	23
Motels	Casa Nostra Motel Mackay	22
Motels	Mackay Motor Inn	22
Pub Accommodation	Boomerang Hotel	22
Holiday Parks/Caravan Parks	Cape Hillsborough Nature Tourist Park	21
Holiday Parks/Caravan Parks	Clermont Caravan Park	20
Serviced Apartments	Mycow Sarina Broad Street	20
Motels	International Lodge Motel	20
Motels	Sarina Beach Motel	20
Pub Accommodation	McGuires Hotel	20
Serviced Apartments	The Shores Holiday Apartments	20
Backpackers	Gecko's Rest	19
Holiday Parks/Caravan Parks	Sarina Palms Caravan Village	19
Motels	Econo Lodge Beachside	19
Pub Accommodation	Ambassador Hotel	19
Resorts	SeaEagles Beach Resort	19
Motels	Bel air Motel	18
Motels	Bona Vista Motel	18
Pub Accommodation	Tandara Hotel Motel	18
Resorts	Broken River Mountain Resort	18
Motels	Galaxy Mackay Motor Inn	16
Motels	Lantern Motor Inn	16
Motels	Peppercorn Motel	16
Motels	Sarina Motor Inn	16
Holiday Parks/Caravan Parks	Whitsunday Cabins	15
Motels	Central Lodge Mackay	15
Holiday Parks/Caravan Parks	The Park Mackay	14
Motels	Cool Palms Motel	14
Motels	Kooyong Hotel	14
Motels	Motel Northview	14
Holiday Parks/Caravan Parks	BIG4 Mackay Blacks Beach Holiday Park	13
Hotels	Eungella Chalet	13
Motels	Sandpiper Motel	13
Pub Accommodation	Carmila Hotel	13
Holiday Parks/Caravan Parks	Moana Caravan Park	12
Motels	Paradise Lodge Motel Mackay	12
Motels	Tramway Motel	12
Holiday Parks/Caravan Parks	BarraCrab Caravan Park	11

Type	Name	Rooms
Holiday Parks/Caravan Parks	Premier Caravan Park	10
Holiday Parks/Caravan Parks	Carmila Caravan Park	10
Holiday Parks/Caravan Parks	Saint Helens Gardens Tourist Park	10
Motels	Carmila Sands Motel	10
Pub Accommodation	Calen Hotel	10
Pub Accommodation	Hotel Mackay	10
Hotels	Mycow Accommodation Greetham Street	9
Motels	A Country View Motel Ilbilbie	9
Motels	Ilbilbie Motel	9
Pub Accommodation	Carlons Hotel	9
Pub Accommodation	Farview Country Tavern Motel	9
Motels	City Gates Motel	8
Motels	Glenden Motel	8
Motels	Mia Mia Motel	8
Motels	Moranbah Outback Motel	8
Motels	Hi-Way Units Motel	7
Pub Accommodation	Clermont Hotel Motel	7
Pub Accommodation	General Gordon Hotel	6
Pub Accommodation	Metropolitan Hotel	6
B&B	YT's by the Sea B & B	5
Holiday Parks/Caravan Parks	Travellers Rest Caravan & Camping Park	5
Holiday Parks/Caravan Parks	Tropicana Caravan Park	5
Motels	Seaforth Holiday Units	5
Pub Accommodation	Commercial Hotel	5
Pub Accommodation	Criterion Hotel	5
Pub Accommodation	Grand Hotel Motel	5
Pub Accommodation	Leo Hotel Motel	5
Pub Accommodation	Middlemount Hotel Motel	5
Pub Accommodation	O'Shea's Hotel-Motel	5
Pub Accommodation	Sarina Hotel	5
Pub Accommodation	Shamrock Hotel	5
Pub Accommodation	Taylor's Hotel	5
B&B	Beachfront B&B	3
B&B	Beachside Bed & Breakfast	3
Holiday Homes/Apartments	Mackay Holiday House - Platypus	3
Holiday Parks/Caravan Parks	Eungella Mountain Edge Escape	3
Holiday Parks/Caravan Parks	Platypus Bushcamp	3
Pub Accommodation	Kuttabul Hotel	3
Resorts	Stoney Creek Farmstay	3
B&B	The Feathered Nest - Luxury Wildlife Retreat	2
B&B	The Old School House B&B	2
Holiday Parks/Caravan Parks	Bucasia Holiday Villa	2
Serviced Apartments	Capricorn Villas	2
B&B	7th Heaven B&B	1
B&B	Campwin Beach House Bed and Breakfast	1
B&B	Golden Lace	1
B&B	Grasstree Beach Bed & Breakfast	1
B&B	Hay Point Country Bed & Breakfast	1
Holiday Homes/Apartments	Absolute Beach Front Mackay	1
Holiday Homes/Apartments	Basil Bay Hut	1
Holiday Homes/Apartments	CBD Holiday House Mackay	1
Holiday Homes/Apartments	Keswick Island "Pandanus Place"	1
Holiday Homes/Apartments	Keswick Island 'The Beach House'	1
Holiday Homes/Apartments	Leeway Beach House	1
Holiday Homes/Apartments	Sandy Shores	1
Holiday Homes/Apartments	Shambahla Creek Cottage	1
Holiday Homes/Apartments	Turtles Nest	1
Holiday Homes/Apartments	Two On Sunset	1
Holiday Homes/Apartments	Units 37 - Accommodation	1
Holiday Parks/Caravan Parks	Bucasia Beachfront Caravan Resort	-
Holiday Parks/Caravan Parks	Armstrong Beach Caravan Park	-

Type	Name	Rooms
Holiday Parks/Caravan Parks	Jolimont Caravan Park	-
Holiday Parks/Caravan Parks	Kinchant Waters Caravan Park	-
Holiday Parks/Caravan Parks	Mirani Caravan Park	-
Backpackers	Blair House Student Hostel	-
Camping Areas	Ball Bay Camp Ground	-
Camping Areas	Crediton Hall Campground	-
Camping Areas	Saint Helens Beach Camping Area	-
Camping Areas	Seaforth Camping Reserve	-
Holiday Parks/Caravan Parks	O'Connell River Tourist Park	-
Mining Accommodation	Belyando Crossing Roadhouse	-
Mining Accommodation	The MAC Coppabella Village Accommodation Centre	-

Appendix 2 Attractions Audit

Table 32: Full Attractions Audit

Type	Name	Free/Paid	LGA
Animal Park	ValleyView Minis	Paid	Mackay
Arts-based Product	Artspace Mackay	Free	Mackay
Arts-based Product	Blue Water Trail	Free	Mackay
Arts-based Product	Sarina Tourist Art & Craft Centre	Free	Mackay
Arts-based Product	Yakapari Country Crafts & Community Centre	Paid	Mackay
Fishing Tours	Action Charters	Paid	Mackay
Fishing Tours	Elizabeth E II Cruises	Paid	Mackay
Fishing Tours	Fishin' Magician	Paid	Mackay
Fishing Tours	Inshore Fishing	Paid	Mackay
Fishing Tours	Mackay Fly & Sportfishing	Paid	Mackay
Fishing Tours	Northern Conquest Charters	Paid	Mackay
Fishing Tours	Reefari Pty Ltd	Paid	Mackay
Food Experiences	Ballantyne's Strawberry Farm	Paid	Mackay
Food Experiences	Freckle Farm	Paid	Mackay
Food Experiences	Goanna Brewing	Paid	Mackay
Food Experiences	Mackay Fish Market	Paid	Mackay
Food Experiences	Nannu Johnny's Farm	Paid	Mackay
Gardens & Parks	Hoods Lagoon	Free	Isaac
Gardens & Parks	J.m.mulherin Memorial Park	Free	Mackay
Gardens & Parks	Mackay Community Garden	Free	Mackay
Gardens & Parks	Mackay Orchid House	Free	Mackay
Gardens & Parks	Mackay Regional Botanic Gardens	Free	Mackay
Gardens & Parks	Queens Park	Free	Mackay
Indoor Recreation	Adrenalin Paintball Mackay	Paid	Mackay
Indoor Recreation	Paradise Aquatics & Fitness	Paid	Mackay
Indoor Recreation	Sidetrax Entertainment Hub (Indoor Go Karts)	Paid	Mackay
Major Natural Sites	Bluff Hill National Park	Free	Mackay
Major Natural Sites	Boulder Creek	Free	Mackay
Major Natural Sites	Broken River Platypus Viewing (Free)	Free	Mackay
Major Natural Sites	Cape Hillsborough National Park	Free	Mackay
Major Natural Sites	Cape Palmerston National Park	Free	Mackay
Major Natural Sites	Eungella National Park	Free	Mackay
Major Natural Sites	Finch Hatton Gorge	Free	Mackay
Major Natural Sites	Homevale National Park	Free	Isaac
Major Natural Sites	Lamberts Lookout	Free	Mackay
Major Natural Sites	Little Wolfang Peak	Free	Isaac
Major Natural Sites	Lords Table Mountain	Free	Isaac
Major Natural Sites	Mazeppa National Park	Free	Isaac
Major Natural Sites	Nairana National Park	Free	Isaac
Major Natural Sites	Narrien Range National Park	Free	Isaac
Major Natural Sites	Newry Islands National Park	Free	Mackay
Major Natural Sites	Peak Range National Park	Free	Isaac
Major Natural Sites	Pioneer River	Free	Mackay
Major Natural Sites	Slade Point	Free	Mackay
Major Natural Sites	Smith Islands National Park	Free	Mackay
Major Natural Sites	The Pioneer Valley	Free	Mackay
Major Natural Sites	Theresa Creek Dam	Free	Isaac
Major Natural Sites	West Hill National Park	Free	Mackay
Major Natural Sites	Yuwi Paree Toolkoon National Park	Free	Mackay
Museums & Cultural Attractions/Sites	Art Deco Walk	Free	Mackay
Museums & Cultural Attractions/Sites	Bluewater Sculpture Trail	Free	Mackay
Museums & Cultural Attractions/Sites	Clermont Cemetery	Free	Isaac
Museums & Cultural Attractions/Sites	Clermont Museum	Paid	Isaac
Museums & Cultural Attractions/Sites	Clermont Old Town Site	Free	Isaac
Museums & Cultural Attractions/Sites	Copperfield Store and Chimney	Free	Isaac
Museums & Cultural Attractions/Sites	Finch Hatton War Memorial	Free	Mackay
Museums & Cultural Attractions/Sites	Greenmount Homestead	Paid	Mackay
Museums & Cultural Attractions/Sites	Jubilee Park	Free	Mackay

Type	Name	Free/Paid	LGA
Museums & Cultural Attractions/Sites	Koumala War Memorial	Free	Mackay
Museums & Cultural Attractions/Sites	Mackay General Cemetery	Free	Mackay
Museums & Cultural Attractions/Sites	Mackay Historical Society and Museum Inc.	Paid	Mackay
Museums & Cultural Attractions/Sites	Mackay Tiger Moth Museum Inc	Free	Mackay
Museums & Cultural Attractions/Sites	Mackay Town Hall	Free	Mackay
Museums & Cultural Attractions/Sites	Melba House	Free	Mackay
Museums & Cultural Attractions/Sites	Mount Britton Abandoned Gold Mine	Free	Isaac
Museums & Cultural Attractions/Sites	Nebo Museum	Free	Isaac
Museums & Cultural Attractions/Sites	Norwich Park Coal Mine	Free	Isaac
Museums & Cultural Attractions/Sites	Piano Up A Tree	Free	Isaac
Museums & Cultural Attractions/Sites	Pioneer Valley Museum	Free	Mackay
Museums & Cultural Attractions/Sites	Sarina Big Cane Toad	Free	Mackay
Museums & Cultural Attractions/Sites	Sarina District Historical Centre	Free	Mackay
Museums & Cultural Attractions/Sites	Sarina Sugar Shed	Paid	Mackay
Museums & Cultural Attractions/Sites	Sarina War Memorial	Free	Mackay
Museums & Cultural Attractions/Sites	The Flood Memorial or "The Stump"	Free	Isaac
Museums & Cultural Attractions/Sites	The Leichhardt Tree	Free	Mackay
Museums & Cultural Attractions/Sites	Where is Yesterdays Memories	Paid	Mackay
Museums & Cultural Attractions/Sites	World War I Cenotaph, Mackay	Free	Mackay
Outdoor Recreation	Adrenalin Laser Skirmish	Paid	Mackay
Outdoor Recreation	Aqua Park Mackay	Paid	Mackay
Outdoor Recreation	Bird Watching (free)	Free	Mackay
Outdoor Recreation	Bluewater Lagoon	Free	Mackay
Outdoor Recreation	Forest Flying	Paid	Mackay
Outdoor Recreation	Keswick Island Scuba (Free)	Free	Mackay
Outdoor Recreation	Kommo Toera Trail	Paid	Mackay
Outdoor Recreation	Lake Elphinstone Water-based Recreation (free)	Free	Isaac
Outdoor Recreation	Mackay Aquatic & Recreation Complex	Paid	Mackay
Outdoor Recreation	Memorial Swim Centre	Paid	Mackay
Outdoor Recreation	Musical Playground	Free	Isaac
Outdoor Recreation	Pioneer Swim Centre	Paid	Mackay
Outdoor Recreation	Rainforest Scuba Diving	Paid	Mackay
Outdoor Recreation	Sandfly Creek Walkway	Free	Mackay
Outdoor Recreation	Seaforth Pines Outdoor Education and Conference Centre	Paid	Mackay
Outdoor Recreation	Teemburra Dam Fishing (Free)	Free	Mackay
Outdoor Recreation	The Singapore Shipwreck Dive Site (Free)	Free	Mackay
Outdoor Recreation	Wake House Australia	Paid	Mackay
Tours	Rainforest Scuba Land Tours	Paid	Mackay
Tours	Reeforest Adventure Tours - Mackay	Paid	Mackay
Tours	Sunrise Wallaby Tours	Paid	Mackay

Appendix 3 TripAdvisor Accommodation Data Scrape Findings

Table 33: TripAdvisor Accommodation Data Scrape Findings

Property Name	Type	Branded?	LGA	Number of Reviews	Trip Advisor Score	Rooms	Price Category
Absolute Beach Front Mackay	Boutique Accommodation		Mackay	n/a			$200-$299
Alara Motor Inn Mackay	Motels		Mackay	74 reviews	4.5	40	$100-$199
Ambassador Hotel	Pub Accommodation		Mackay	n/a			$200-$299
Andergrove Van Park	Holiday Parks/Caravan Parks		Mackay	93 reviews	4	100	Price n/a
Armstrong Beach Caravan Park	Holiday Parks/Caravan Parks		Mackay	5 reviews	4		Price n/a
BarraCrab Caravan Park Clairview	Holiday Parks/Caravan Parks		Isaac	241 reviews	3.5	11	Price n/a
Beachfront Bed & Breakfast	B&B		Mackay	14 reviews	4.5	3	Price n/a
Beachside Bed & Breakfast	B&B		Mackay	14 reviews	4.5	3	Price n/a
Bel Air Motel	Motels		Mackay	11 reviews	4.5	18	<$100
Best Western Marco Polo Mackay	Motels	Yes	Mackay	83 reviews	4	38	$100-$199
BIG4 Mackay Marine Tourist Park	Holiday Parks/Caravan Parks	Yes	Mackay	199 reviews	3.5	30	$100-$199
Black Nugget Hotel Motel	Motels		Isaac	13 reviews	3.5	28	$100-$199
Blue Ribbon Motor Inn	Motels		Mackay	11 reviews	4.5	32	Price n/a
Bona Vista Motel	Motels		Mackay	34 reviews	3.5	18	Price n/a
Boomerang Hotel	Pub Accommodation		Mackay	31 reviews	3	22	<$100
Broken River Mountain Resort Eungella	Resorts		Mackay	254 reviews	4.5	18	$100-$199
Bucasia Beachfront Caravan Resort	Holiday Parks/Caravan Parks		Mackay	67 reviews	4	40	Price n/a
Bucasia Holiday Villa	Holiday Parks/Caravan Parks		Mackay	4 reviews	5	2	Price n/a
Campwin Beach House Bed and Breakfast	B&B		Mackay	77 reviews	5.0	1	Price n/a
Cape Palmerston Holiday Park	Holiday Parks/Caravan Parks		Isaac	63 reviews	4.5	4	Price n/a
Capricorn Villas	Serviced Apartments		Mackay	n/a			$100-$199
Carlon's Hotel	Pub Accommodation		Mackay	1 review	4		Price n/a
Carmila Caravan Park	Holiday Parks/Caravan Parks		Mackay	29 reviews	4	10	Price n/a
Carmila Hotel	Pub Accommodation		Mackay	12 reviews	3.5	13	Price n/a
Carmila Sands Motel	Motels		Mackay	41 reviews	4.5	10	$100-$199
Casa Nostra Motel Mackay	Motels		Mackay	10 reviews	5	22	$100-$199
Central Tourist Park	Holiday Parks/Caravan Parks		Mackay	41 reviews	3		<$100
Clermont Caravan Park	Holiday Parks/Caravan Parks		Isaac	37 reviews	4	90	Price n/a
Clermont Country Motor Inn	Motels		Isaac	18 reviews	4.5	25	$100-$199
Coal Country Caravan Park	Mining Accommodation		Isaac	2 reviews	4		Price n/a
Comfort Resort Blue Pacific	Resorts		Mackay	56 reviews	3.5	28	$100-$199
Cool Palms Motel	Motels		Mackay	66 reviews	4	14	<$100
Coral Cay Resort	Resorts		Mackay	203 reviews	4	82	$100-$199
Coral Sands Motel	Motels		Mackay	58 reviews	3.5	47	$100-$199
Country Plaza Motor Inn	Motels		Mackay	82 reviews	4.5	38	$100-$199
Country Roads Motor Inn Dysart	Motels		Isaac	24 reviews	4.5	50	$100-$199
Direct Hotels - Monterey Moranbah	Serviced Apartments	Yes	Isaac	37 reviews	4.5	51	$300+
Direct Hotels - Pacific Sands	Serviced Apartments	Yes	Mackay	96 reviews	4	80	$100-$199
Dolphin Heads Resort	Resorts		Mackay	187 reviews	3	50	$100-$199
Econo Lodge Beachside	Motels		Mackay	32 reviews	5	19	$100-$199
Eungella Chalet	Hotels		Mackay	71 reviews	3.5	13	Price n/a
Farview Motel	Motels		Mackay	3 reviews	3.5		Price n/a
Finch Hatton Gorge Cabins	Holiday Parks/Caravan Parks		Mackay	17 reviews	4	1	Price n/a
Galaxy Mackay Motor Inn	Motels		Mackay	24 reviews	4		<$100
Gecko's Rest Budget Accommodation & Backpackers	Hostel		Mackay	61 reviews	3	19	<$100
Golden Lace B&B	B&B		Mackay	9 reviews	5.0		<$100
Grasstree Beach Bed & Breakfast	B&B		Mackay	19 reviews	5.0	1	Price n/a
Halliday Bay Resort	Resorts		Mackay	22 reviews	2	23	$100-$199
hay point country bed & breakfast	B&B		Mackay	n/a			$100-$199
Hi-Way Units Motel	Motels		Mackay	10 reviews	4.5		$100-$199

Property Name	Type	Branded?	LGA	Number of Reviews	Trip Advisor Score	Rooms	Price Category
Hotel Mackay	Pub Accommodation		Mackay	8 reviews	3	10	Price n/a
ibis Mackay	Hotels	Yes	Mackay	340 reviews	4.5	152	$100-$199
Ilbilbie Motel	Motels		Isaac	10 reviews	3.5	9	<$100
Illawong Beach Resort	Resorts		Mackay	35 reviews	3.5	37	$100-$199
International Lodge Motel	Motels		Mackay	259 reviews	4.5	20	$100-$199
Jolly Collier Hotel Motel	Motels		Isaac	13 reviews	2.5	51	Price n/a
Keswick Island Guest House	Boutique Accommodation		Mackay		5		Price n/a
Kinchant Waters Caravan Park	Holiday Parks/Caravan Parks		Mackay	12 reviews	2		Price n/a
Kohuna Beachside Resort	Resorts		Mackay	15 reviews	4.5	60	Price n/a
Kooyong Hotel	Motels		Mackay	13 reviews	2	14	<$100
La Solana Holiday Units	Serviced Apartments		Mackay	19 reviews	4.5	7	Price n/a
Lanai Riverside Apartments	Serviced Apartments		Mackay	98 reviews	4	65	$200-$299
Lantern Motor Inn	Motels		Mackay	29 reviews	4.5	16	$100-$199
Larrikin Lodge	Hostel		Mackay	5 reviews	4		Price n/a
Mackay Blacks Beach Holiday Park	Holiday Parks/Caravan Parks		Mackay	233 reviews	4.5	13	$200-$299
Mackay Marina Hotel	Hotels		Mackay	16 reviews	3.5	78	$100-$199
Mackay Motor Inn	Motels		Mackay	69 reviews	4	22	<$100
Mackay Oceanside Central	Motels		Mackay	385 reviews	5	57	$100-$199
Mackay Resort Motel	Motels		Mackay	55 reviews	4.5	40	$100-$199
Mackay Rose Motel	Motels		Mackay	219 reviews	4.5	26	$100-$199
Mackay Seabreeze Apartments	Serviced Apartments		Mackay	39 reviews	4	36	$100-$199
MAS Country Tandara Hotel Motel	Motels		Mackay	19 reviews	3	15	$100-$199
Mcguire's CBD Hotel	Pub Accommodation		Mackay	11 reviews	2	20	<$100
Metropolitan Hotel	Pub Accommodation		Mackay	22 reviews	3.5	6	$100-$199
Mid City Motor Inn	Motels		Mackay	141 reviews	4	33	$100-$199
Miners Lodge Motor Inn	Motels		Mackay	102 reviews	4	29	$100-$199
Moana Caravan Park	Holiday Parks/Caravan Parks		Mackay	9 reviews	3.5	12	Price n/a
Moranbah Hostel	Hostel		Isaac	n/a			Price n/a
Moranbah Isaac Motel	Motels		Isaac	26 reviews	3	69	Price n/a
Moranbah Motor Inn	Motels		Isaac	18 reviews	3	31	$100-$199
Moranbah Outback Motel	Motels		Isaac	6 reviews	3.5		$100-$199
Motel Northview	Motels		Mackay	39 reviews	4.5	14	$100-$199
Mycow Accommodation Greetham Street	Hotels		Mackay	n/a			Price n/a
MyCow Accommodation Mackay	Holiday Parks/Caravan Parks		Mackay	25 reviews	3.5	40	<$100
Nebo Hotel	Pub Accommodation		Mackay	11 reviews	4	30	Price n/a
Nebo Junction Accommodation Village	Mining Accommodation		Mackay	2 reviews	3.5		Price n/a
Oaks Mackay Carlyle Suites	Hotels	Yes	Mackay	293 reviews	4	59	$100-$199
Oaks Mackay Rivermarque Hotel	Hotels	Yes	Mackay	580 reviews	4	138	$100-$199
Oaks Middlemount Suites	Serviced Apartments	Yes	Mackay	12 reviews	4.5	27	$200-$299
Oaks Moranbah Suites	Serviced Apartments	Yes	Isaac	24 reviews	4	30	$300+
Ocean International Hotel	Hotels		Mackay	131 reviews	4	46	$100-$199
Ocean Resort Village	Resorts		Mackay	8 reviews	1.5	34	Price n/a
Paradise Lodge Motel	Holiday Parks/Caravan Parks		Mackay	52 reviews	4.5	12	<$100
Peppercorn Motel	Motels		Isaac	78 reviews	4	16	$100-$199
Pioneer Valley Show Grounds Finch, Hatton	Holiday Parks/Caravan Parks		Mackay	2 reviews	4.5		Price n/a
Platypus Bush Camp	Boutique Accommodation		Mackay	57 reviews	4	3	Price n/a
Premier Caravan Park	Holiday Parks/Caravan Parks		Mackay	26 reviews	3.5	94	Price n/a
Quest Mackay	Hotels	Yes	Mackay	380 reviews	4.5	96	$100-$199
Quest Mackay on Gordon	Serviced Apartments	Yes	Mackay	543 reviews	4.5	115	$100-$199
Reef Resort Mackay	Resorts		Mackay	36 reviews	3.5	36	$100-$199
Riviera Mackay	Serviced Apartments		Mackay	158 reviews	4.5	64	$100-$199
Rover Holiday Units	Serviced Apartments		Mackay	9 reviews	3.5	29	$100-$199
Rydges Mackay Suites	Hotels	Yes	Mackay	65 reviews	3.5	90	$200-$299
Sandpiper Motel	Motels		Mackay	10 reviews	4.5	23	Price n/a
Sarina Beach Fernandos Hideaway Bed & Breakfast	B&B		Mackay	15 reviews	3.5	3	Price n/a

Property Name	Type	Branded?	LGA	Number of Reviews	Trip Advisor Score	Rooms	Price Category
Sarina Beach Motel	Motels		Mackay	91 reviews	4	20	$100-$199
Sarina Hotel	Pub Accommodation		Mackay	n/a			$100-$199
Sarina Motor Inn	Motels		Mackay	38 reviews	3.5	16	$100-$199
Sarina Palms Caravan Village	Holiday Parks/Caravan Parks		Mackay	82 reviews	4	19	Price n/a
SeaEagles Beach Resort	Resorts		Mackay	2 reviews	5	19	$200-$299
Seaforth Holiday Units	Motels		Mackay	51 reviews	4.5	5	$100-$199
Shakespeare Motel	Motels		Mackay	127 reviews	4.5	36	$100-$199
Shamrock Gardens Motel	Motels		Mackay	217 reviews	4.5	28	$100-$199
Smart Stay Villages Moranbah	Motels		Isaac	n/a		146	$100-$199
Smart Stayzzz Inns	Serviced Apartments		Isaac	36 reviews	4.5	29	$100-$199
Stayover in Dysart	Mining Accommodation		Isaac	2 reviews	3		Price n/a
Sun Plaza Motel	Motels		Mackay	24 reviews	3		<$100
Swag Motel	Motels		Mackay	17 reviews	4	48	$100-$199
Taylors Hotel	Pub Accommodation		Mackay	n/a			<$100
The Feathered Nest - Luxury Wildlife Retreat	Boutique Accommodation		Mackay	70 reviews	5.0	2	$300+
The Mac Village	Holiday Parks/Caravan Parks		Mackay	3 reviews	4		Price n/a
The Old School House B&B	B&B		Mackay	7 reviews	5.0		Price n/a
The Park Mackay	Holiday Parks/Caravan Parks		Mackay	42 reviews	4	14	$100-$199
The Shores Holiday Apartments	Serviced Apartments		Mackay	116 reviews	4.5	20	$200-$299
The Villages	Holiday Parks/Caravan Parks		Mackay	n/a			<$100
The Windmill Motel and Events Centre	Motels		Mackay	158 reviews	4	42	$100-$199
Tramway Motel	Motels		Mackay	66 reviews	4	12	$100-$199
Travellers Rest Caravan and Camping Park	Holiday Parks/Caravan Parks		Mackay	41 reviews	3	5	Price n/a
Tropic Coast Motel	Motels		Mackay	66 reviews	4	35	$100-$199
Tropicana Tourist Caravan Park	Holiday Parks/Caravan Parks		Mackay	12 reviews	4	5	Price n/a
Vitrinite Village	Holiday Parks/Caravan Parks		Mackay	6 reviews	4.5	80	Price n/a
Western Heritage Motor Inn	Motels		Isaac	34 reviews	4	50	$200-$299
White Lace Motor Inn	Motels		Mackay	174 reviews	4	37	$100-$199

Appendix 4 TripAdvisor Data Scrape For Things To Do In The Mackay Region

Table 34: 'Things to do' Sentiment Assessment Detailed

Attraction Name	Attraction Type	Attraction Category	Rating	Area	LGA	Number of Reviews	Rating
Mackay Aqua Park	Water Parks	Recreation Product	#1 of 46 things to do in Mackay	Mackay	Mackay	145	5
Bluewater Lagoon	Water Parks	Recreation Product	#2 of 46 things to do in Mackay	Mackay	Mackay	357	4.5
Bluewater Trail	Biking Trails	Nature-Based Product	#3 of 46 things to do in Mackay	Mackay	Mackay	159	4.5
Mackay Regional Botanic Gardens	Gardens	Nature-Based Product	#4 of 46 things to do in Mackay	Mackay	Mackay	222	4
Caneland Central Shopping Centre	Shopping Malls	Retail	#5 of 46 things to do in Mackay	Mackay	Mackay	96	4.5
Orchid Display House	Gardens	Nature-Based Product	#6 of 46 things to do in Mackay	Mackay	Mackay	71	4.5
Bucasia Beach	Beaches	Nature-Based Product	#7 of 46 things to do in Mackay	Mackay	Mackay	42	4.5
Mackay Visitor Information Centre	Visitor Centres	Cultural & Heritage Product	#8 of 46 things to do in Mackay	Mackay	Mackay	63	4
Greenmount Homestead	History Museums	Cultural & Heritage Product	#9 of 46 things to do in Mackay	Mackay	Mackay	39	4.5
Gooseponds	Parks, Nature & Wildlife Areas	Nature-Based Product	#10 of 46 things to do in Mackay	Mackay	Mackay	29	4.5
Lamberts Lookout	Beaches, Lookouts	Nature-Based Product	#11 of 46 things to do in Mackay	Mackay	Mackay	24	4.5
Artspace Mackay	Art Galleries	Cultural & Heritage Product	#12 of 46 things to do in Mackay	Mackay	Mackay	52	4
Slade Point	Lookouts	Nature-Based Product	#13 of 46 things to do in Mackay	Mackay	Mackay	21	4.5
Pioneer River	Bodies of Water	Nature-Based Product	#14 of 46 things to do in Mackay	Mackay	Mackay	17	4.5
Mackay Entertainment and Convention Centre (MECC)	Theatres	Cultural & Heritage Product	#15 of 46 things to do in Mackay	Mackay	Mackay	25	4.5
Harbour Beach	Beaches	Nature-Based Product	#16 of 46 things to do in Mackay	Mackay	Mackay	23	4
Dolphin Heads	Beaches, Lookouts	Nature-Based Product	#17 of 46 things to do in Mackay	Mackay	Mackay	13	4.5
Dudley Denny City Library	Libraries	Cultural & Heritage Product	#18 of 46 things to do in Mackay	Mackay	Mackay	8	5
Sandfly Creek Walkway	Hiking Trails	Nature-Based Product	#19 of 46 things to do in Mackay	Mackay	Mackay	10	4.5
Lamberts Beach Lookout	Lookouts	Nature-Based Product	#20 of 46 things to do in Mackay	Mackay	Mackay	7	4.5
Lamberts Beach	Beaches	Nature-Based Product	#21 of 46 things to do in Mackay	Mackay	Mackay	9	4
Town Beach	Beaches	Nature-Based Product	#22 of 46 things to do in Mackay	Mackay	Mackay	11	4
Kitten Vintage Mackay	Antique Stores	Retail	#23 of 46 things to do in Mackay	Mackay	Mackay	4	5
Mango Avenue	Scenic Drives, Points of Interest & Landmarks	Nature-Based Product	#24 of 46 things to do in Mackay	Mackay	Mackay	6	4.5
The Leichhardt Tree	Points of Interest & Landmarks	Points of Interest & Landmarks, Historic Sites	#25 of 46 things to do in Mackay	Mackay	Mackay	6	4
Far Beach	Beaches	Nature-Based Product	#26 of 46 things to do in Mackay	Mackay	Mackay	6	4
Mackay Town Hall	Points of Interest & Landmarks	Points of Interest & Landmarks, Historic Sites	#27 of 46 things to do in Mackay	Mackay	Mackay	4	4.5
Mackay General Cemetery	Cemeteries	Cultural & Heritage Product	#28 of 46 things to do in Mackay	Mackay	Mackay	5	4
Mackay Museum	History Museums	Cultural & Heritage Product	#29 of 46 things to do in Mackay	Mackay	Mackay	4	4.5

Attraction Name	Attraction Type	Attraction Category	Rating	Area	LGA	Number of Reviews	Rating
J.m.mulherin Memorial Park	Playgrounds, Parks	Recreation Product	#30 of 46 things to do in Mackay	Mackay	Mackay	5	4
Illawong Beach	Beaches	Nature-Based Product	#31 of 46 things to do in Mackay	Mackay	Mackay	4	4
Armstrong Beach	Beaches	Nature-Based Product	#32 of 46 things to do in Mackay	Mackay	Mackay	2	4.5
Northpoint Retail	Shopping Malls	Retail	#33 of 46 things to do in Mackay	Mackay	Mackay	3	4
Art Deco Walk	Points of Interest & Landmarks, Historic Sites	Points of Interest & Landmarks, Historic Sites	#34 of 46 things to do in Mackay	Mackay	Mackay	1	5
Goanna Brewing	Breweries	F&B Product	#35 of 46 things to do in Mackay	Mackay	Mackay	5	4
Parkside Plaza Mackay	Shopping Malls	Retail	#36 of 46 things to do in Mackay	Mackay	Mackay	2	4
Homevale National Park	Nature & Wildlife Areas, National Parks	Nature-Based Product	#37 of 46 things to do in Mackay	Mackay	Mackay	1	4
Pioneer Swim Centre	Sports Complexes	Recreation Product	#38 of 46 things to do in Mackay	Mackay	Mackay	2	3
Kommo Toera Trail	Scenic Walking Areas	Nature-Based Product	#39 of 46 things to do in Mackay	Mackay	Mackay		n/a
St Helens Beach	Beaches	Nature-Based Product	#40 of 46 things to do in Mackay	Mackay	Mackay		n/a
Boulder Creek	Nature & Wildlife Areas	Nature-Based Product	#41 of 46 things to do in Mackay	Mackay	Mackay		n/a
Yuwi Paree Toolkoon National Park	National Parks	Nature-Based Product	#42 of 46 things to do in Mackay	Mackay	Mackay		n/a
Bluff Hill National Park	National Parks	Nature-Based Product	#43 of 46 things to do in Mackay	Mackay	Mackay		n/a
Smith Islands National Park	National Parks, Nature & Wildlife Areas	Nature-Based Product	#44 of 46 things to do in Mackay	Mackay	Mackay		n/a
Nairana National Park	National Parks, Nature & Wildlife Areas	Nature-Based Product	#45 of 46 things to do in Mackay	Mackay	Mackay		n/a
Memorial Swim Centre	Sports Complexes	Recreation Product	#46 of 46 things to do in Mackay	Mackay	Mackay		n/a
Hoods Lagoon	Bodies of Water	Nature-Based Product	#1 of 9 things to do in Clermont	Clermont	Isaac	16	4.5
Theresa Creek Dam	Dams, Nature & Wildlife Areas	Nature-Based Product	#2 of 9 things to do in Clermont	Clermont	Isaac	21	4
Copperfield	Ghost Towns	Cultural & Heritage Product	#4 of 9 things to do in Clermont	Clermont	Isaac	7	4
Clermont Historical Centre	History Museums	Cultural & Heritage Product	#5 of 9 things to do in Clermont	Clermont	Isaac	7	4
The Stump Flood Memorial	Monuments & Statues	Points of Interest & Landmarks, Historic Sites	#6 of 9 things to do in Clermont	Clermont	Isaac	5	4
Clermont Cemetery	Cemeteries	Cultural & Heritage Product	#7 of 9 things to do in Clermont	Clermont	Isaac	1	4
Narrien Range National Park	Nature & Wildlife Areas, National Parks	Nature-Based Product	#8 of 9 things to do in Clermont	Clermont	Isaac		n/a
Mazeppa National Park	National Parks, Nature & Wildlife Areas	Nature-Based Product	#9 of 9 things to do in Clermont	Clermont	Isaac		n/a
Lake Elphinstone	Bodies of Water	Nature-Based Product	#1 of 4 things to do in Nebo	Nebo	Isaac	6	4
Mount Britton	Ghost Towns, Historic Sites	Cultural & Heritage Product	#2 of 4 things to do in Nebo	Nebo	Isaac	2	3.5
West Ridge Lookout	Lookouts, Points of Interest & Landmarks	Nature-Based Product	#3 of 4 things to do in Nebo	Nebo	Isaac	1	4
Nebo Museum	History Museums	Cultural & Heritage Product	#4 of 4 things to do in Nebo	Nebo	Isaac		n/a

Attraction Name	Attraction Type	Attraction Category	Rating	Area	LGA	Number of Reviews	Rating
Bundoora Dam	Dams, Nature & Wildlife Areas	Nature-Based Product	#1 of 1 things to do in Middlemount	Middlemount	Isaac	2	4
Lords Table Mountain	Mountains	Nature-Based Product	#1 of 3 things to do in Dysart	Dysart	Isaac	1	5
Norwich Park Coal Mine	Mines, Points of Interest & Landmarks	Points of Interest & Landmarks, Historic Sites	#2 of 3 things to do in Dysart	Dysart	Isaac		n/a
Peak Range National Park	Nature & Wildlife Areas, National Parks	Nature-Based Product	#3 of 3 things to do in Dysart	Dysart	Isaac		n/a
Finch Hatton Gorge	Nature & Wildlife Areas	Nature-Based Product	#1 of 4 things to do in Finch Hatton	Finch Hatton	Mackay	78	4.5
Forest Flying	Theme Parks	Recreation Product	#2 of 4 things to do in Finch Hatton	Finch Hatton	Mackay	50	5
ValleyView Minis	Zoos	Nature-Based Product	#4 of 4 things to do in Finch Hatton	Finch Hatton	Mackay		n/a
West Hill National Park	Islands, Nature & Wildlife Areas, National Parks	Nature-Based Product	#1 of 1 things to do in Carmila	Carmila	Isaac		n/a
Sarina Tourist Art and Craft Centre	Visitor Centres	Cultural & Heritage Product	#2 of 4 things to do in Sarina	Sarina	Mackay	13	5
Sarina District Historical Centre	History Museums	Cultural & Heritage Product	#4 of 4 things to do in Sarina	Sarina	Mackay	5	4
Big Cane Toad	Monuments & Statues	Points of Interest & Landmarks, Historic Sites	#3 of 4 things to do in Sarina	Sarina	Mackay	17	4
Sarina Sugar Shed	Sightseeing Tours	Guided Tours	#1 of 4 things to do in Sarina	Sarina	Mackay	179	4.5

Appendix 5 TripAdvisor Data Scrape For Bookable Attractions

Table 35: TripAdvisor Data Scrape For Bookable Attractions

Attraction Name	Number Of Reviews	Operator	Category	Price Point	Trip Advisor Rating	Region	Area
1-Night Whitsundays Tour by Catamaran with Paradise Cove Resort from...	16 reviews	Red Cat Adventures	Cruises & Sailing	$299.00	4.5	Whitsundays	Whitsunday Islands
2 Day Great Barrier Reef "Reefsuites" Experience	6 reviews	Cruise Whitsundays	Cruises & Sailing	$799.00	4.5	Whitsundays	Whitsunday Islands
2 Day Sailing and Snorkeling Tour in Whitsundays Islands	2 reviews	Wings Whitsunday Adventures	Cruises & Sailing	$499.00	5	Whitsundays	Whitsunday Islands
2 Days Sailing Tour in Whitsunday Islands with Single Berth		Wings Whitsunday Adventures	Cruises & Sailing	$499.00		Whitsundays	Whitsunday Islands
2 Night Small Group Whitsundays Sailing Adventure Aboard Mandrake	114 reviews	OzSail	Cruises & Sailing	$474.00	5	Whitsundays	Whitsunday Islands
2 night Whitsunday Islands Cruise on Atlantic Clipper from Airlie...	30 reviews	True Blue Sailing	Cruises & Sailing	$532.27	4.5	Whitsundays	Whitsunday Islands
2 night Whitsunday Islands Cruise on New Horizon from Airlie Beach	212 reviews	True Blue Sailing	Cruises & Sailing	$474.67	5	Whitsundays	Whitsunday Islands
2-Day Great Barrier Reef "Reefsleep" Experience	63 reviews	Cruise Whitsundays	Cruises & Sailing	$595.00	5	Whitsundays	Whitsunday Islands
2-Day Whitsundays Sailing Adventure: Alexander Stewart	39 reviews	Whitsundays Sailing Adventures	Cruises & Sailing	$399.00	4.5	Whitsundays	Whitsunday Islands
2-Day Whitsundays Sailing Adventure: Summertime	69 reviews	Whitsundays Sailing Adventures	Cruises & Sailing	$425.60	4.5	Whitsundays	Whitsunday Islands
2-Day Whitsundays Sailing Adventure: SV Whitehaven	22 reviews	Whitsundays Sailing Adventures	Cruises & Sailing	$399.00	4.5	Whitsundays	Whitsunday Islands
2-Days Queensland Airlie Beach Sailing Trip with Meals		Waltzing Matilda Sailing Whitsundays	Cruises & Sailing	$399.00		Whitsundays	Whitsunday Islands
2-Night Whitsunday Islands All-Inclusive Sailing Tour from Airlie...	116 reviews	Red Cat Adventures	Cruises & Sailing	$499.00	5	Whitsundays	Whitsunday Islands
2-Night Whitsunday Islands Catamaran Cruise with Resort Stay from...	129 reviews	Red Cat Adventures	Cruises & Sailing	$599.00	5	Whitsundays	Whitsunday Islands
2-Night Whitsunday Islands Sailing Adventure on Trimaran 'Avatar'	170 reviews	OzSail	Cruises & Sailing	$347.10	4.5	Whitsundays	Whitsunday Islands
2-Night Whitsundays Sailing Adventure: Whitsunday Getaway	12 reviews	Whitsundays Sailing Adventures	Cruises & Sailing	$933.34	5	Whitsundays	Whitsunday Islands
2-Night Whitsundays Sailing Cruise Aboard 'Spank Me' Including...	393 reviews	OzSail	Cruises & Sailing	$474.00	5	Whitsundays	Whitsunday Islands
3 Day Whitsundays Sailing and Diving Adventure: Kiana	21 reviews	Whitsundays Sailing Adventures	Cruises & Sailing	$749.00	4	Whitsundays	Whitsunday Islands
Adult Return Airport Transfer Whitsunday Coast Airport to Airlie Beach	2 reviews	Whitsunday Transit	Transfers	$36.00	5	Whitsundays	Airlie Beach
Adventure Fishing Combo Day - Fish, Swim, Whitehaven, Hill Inlet Bush...		Coral Coast Charters Whitsundays	Fishing Charter	$250.00	5	Whitsundays	Airlie Beach
Airlie Beach and Shute Harbour Local Tour			Day/Guided Tour	$220.00		Whitsundays	Airlie Beach
Airlie Beach Bike Hire		Airlie Beach BBQ Party boat hire	Hire	$35.00		Whitsundays	Airlie Beach
Airlie Beach by Land and Sea aboard the Aquaduck Croc Bus	12 reviews	Aquaduck Airlie Beach	Cruises & Sailing	$40.00	4.5	Whitsundays	Airlie Beach
Airlie Beach Glass Bottom Boat Tour	2 reviews	Pioneer Adventures Whitsundays	Cruises & Sailing	$79.00	5	Whitsundays	Whitsunday Islands
Airlie Beach Jet Boat Thrill Ride	117 reviews	Pioneer Adventures Whitsundays	Jet Boat/Jet Ski	$69.00	5	Whitsundays	Airlie Beach
Airlie Beach longboard, penny board, skateboard & scooter hire		Airlie Beach BBQ Party boat hire	Hire	$20.00		Whitsundays	Airlie Beach

Attraction Name	Number Of Reviews	Operator	Category	Price Point	Trip Advisor Rating	Region	Area
Airlie Beach Sunset Private Charter		Pioneer Adventures Whitsundays	Cruises & Sailing	$850.00		Whitsundays	Airlie Beach
Airlie Beach Tandem Skydive	139 reviews	Skydive Airlie Beach	Skydiving	$285.05	4.5	Whitsundays	Airlie Beach
Airlie Beach to Cairns Winter Escape - Reef & Beyond Guided Holidays		Airlie Beach Transfers and Tours	Cruises & Sailing	$6,910.00		Whitsundays	Airlie Beach
Airlie Beach Trike Tours	7 reviews	Airlie Beach Trike Tours	Day/Guided Tour	$51.29	5	Whitsundays	Airlie Beach
Airlie to Bowen Half Day/Guided Tour			Day/Guided Tour	$550.00		Whitsundays	Airlie Beach
Banana Boat Ride from Airlie Beach	1 review	Pioneer Adventures Whitsundays	Cruises & Sailing	$30.00	5	Whitsundays	Airlie Beach
Best of the Whitsundays Seaplane Tour Including Whitehaven Beach...	10 reviews	Air Whitsunday Seaplanes	Scenic Flight	$425.00	4.5	Whitsundays	Airlie Beach
Bowen Tour		Airlie Beach Transfers and Tours	Day/Guided Tour	$109.00		Whitsundays	Airlie Beach
Broomstick Whitsundays Maxi Sailing (2 Days 2 Nights) - single bed	96 reviews	Prosail Whitsundays	Cruises & Sailing	$499.00	5	Whitsundays	Airlie Beach
Broomstick Whitsundays Maxi Sailing (2 Days, 2 Nights) - half a...	32 reviews	Prosail Whitsundays	Cruises & Sailing	$499.00	5	Whitsundays	Airlie Beach
Cedar Creek Falls and Hydeaway Bay Tours		Airlie Beach Transfers and Tours	Day/Guided Tour	$99.00		Whitsundays	Airlie Beach
Condor Whitsundays Maxi Sailing (2 Days 2 Nights) - single bed	55 reviews	Prosail Whitsundays	Cruises & Sailing	$499.00	5	Whitsundays	Airlie Beach
Condor Whitsundays Maxi Sailing (2 Days, 2 Nights) - half a double...	56 reviews	Prosail Whitsundays	Cruises & Sailing	$499.00	5	Whitsundays	Airlie Beach
Conway Beach Tour			Day/Guided Tour	$330.00		Whitsundays	Airlie Beach
Dingo Beach Tour			Day/Guided Tour	$385.00		Whitsundays	Airlie Beach
E-scooter Hire Airlie Beach		Airlie Beach BBQ Party boat hire	Hire	$60.00		Whitsundays	Airlie Beach
Falls To Paradise	5 reviews	Red Cat Adventures	Day/Guided Tour	$99.00	5	Whitsundays	Airlie Beach
Fly & Cruise Package with lunch	66 reviews	GSL Aviation	Cruises & Sailing	$436.27	5	Whitsundays	Whitsunday Islands
Fly & Sail Package (With Providence)		GSL Aviation	Scenic Flight	$329.60		Whitsundays	Whitsunday Islands
Full Day Fishing Charter Airlie Beach Whitsundays		Coral Coast Charters Whitsundays	Fishing Charter	$300.00	5	Whitsundays	Whitsunday Islands
Full Day Snorkel In The Great Barrier Reef	40 reviews	Explore Group	Day/Guided Tour	$251.29	4.5	Whitsundays	Whitsunday Islands
Full Day Whitsunday Reef Fishing Charter Boat		Coral Coast Charters Whitsundays	Fishing Charter	$420.00	5	Whitsundays	Whitsunday Islands
Great Barrier Reef Day Cruise to Reefworld	288 reviews	Cruise Whitsundays	Cruises & Sailing	$279.00	4.5	Whitsundays	Airlie Beach
Great Barrier Reef Luxury Expedition Cruise cabin booking 7 days 6...	10 reviews	Great Barrier Reef Expedition Cruise	Cruises & Sailing	$4,473.69	5	Whitsundays	Whitsunday Islands
Great Barrier Reef Private Expedition Cruise (min 4 day max 8 guests)	1 review	Great Barrier Reef Expedition Cruise	Cruises & Sailing	$12,307.70	5	Whitsundays	Whitsunday Islands
Great Barrier Reef Scenic Flight and Ocean Rafting Whitehaven Beach...	34 reviews	Ocean Rafting	Scenic Flight	$457.60	4.5	Whitsundays	Whitsunday Islands
Great Barrier Reef Scenic Flight from Cairns Including Green Island...	4 reviews	Aussie Airways	Scenic Flight	$263.52	4.5	Whitsundays	Airlie Beach
Half Day SHARE Fishing Charter	9 reviews	Airlie Beach Fishing Charters	Fishing Charter	$147.44	3.5	Whitsundays	Airlie Beach
Half-Day Great Barrier Reef Cruise from Airlie Beach	10 reviews	Cruise Whitsundays	Cruises & Sailing	$199.00	3.5	Whitsundays	Airlie Beach

Attraction Name	Number Of Reviews	Operator	Category	Price Point	Trip Advisor Rating	Region	Area
Hammer Whitsundays Maxi Sailing (2 Days 1 Night) - single bed	136 reviews	Prosail Whitsundays	Cruises & Sailing	$399.00	5	Whitsundays	Airlie Beach
Hammer Whitsundays Maxi Sailing (2 Days, 1 Night) - half a double bed*	33 reviews	Prosail Whitsundays	Cruises & Sailing	$399.00	5	Whitsundays	Airlie Beach
Jet Boat & Banana Boat Combo		Pioneer Adventures Whitsundays	Jet Boat/Jet Ski	$89.00	4.5	Whitsundays	Whitsunday Islands
Jet Ski Safari		GSL Marine	Jet Boat/Jet Ski	$169.60	5	Whitsundays	Airlie Beach
Kangaroos on the Beach at Sunrise & Ancient Waterfall Tour		Sacred Voyage Tours	Day/Guided Tour	$225.00		Whitsundays	Airlie Beach
Lady Enid Sailing and Snorkeling Day Trip, Including Whitehaven Beach	133 reviews	Lady Enid Sailing	Cruises & Sailing	$261.34	5	Whitsundays	Whitsunday Islands
Limo from Airlie Beach to Proserpine airport		Airlie Beach Transfers and Tours	Transfers	$120.00		Whitsundays	Airlie Beach
Limo from Proserpine airport to Airlie Beach	2 reviews	Airlie Beach Transfers and Tours	Transfers	$128.00	2	Whitsundays	Airlie Beach
Matador Whitsundays	263 reviews	Matador Whitsundays	Cruises & Sailing	$304.15	5	Whitsundays	Airlie Beach
MiLady One Day Whitsunday Private Charter		Milady Whitsunday Sailing	Cruises & Sailing	$4,160.00		Whitsundays	Whitsunday Islands
Ocean Rafting Tour to Whitehaven Beach	2,657 reviews	Ocean Rafting	Rafting	$169.00	5	Whitsundays	Whitsunday Islands
One Way Airport Transfer Whitsunday Coast Airport	1 review	Whitsunday Transit	Transfers	$22.00	5	Whitsundays	Airlie Beach
One Way Airport Transfer Whitsunday Coast Airport to Airlie Beach	1 review	Whitsunday Transit	Transfers	$22.00	5	Whitsundays	Airlie Beach
Premium Private Charter		Mars Charters	Cruises & Sailing	$2,250.00		Whitsundays	Whitsunday Islands
Private Airlie Beach Tuk-Tuk Tours	112 reviews	Just Tuk'n Around	Day/Guided Tour	$30.00	5	Whitsundays	Airlie Beach
Private Guided Bushwalking Tour		Absolute Airlie	Day/Guided Tour	$853.34		Whitsundays	Airlie Beach
Private Sailing Charters Providence V Whitsundays	1 review	Providence Whitsunday Sailing	Cruises & Sailing	$1,813.34	2	Whitsundays	Whitsunday Islands
Private Standard Charter Experience in Whitsundays	2 reviews	Mars Charters	Cruises & Sailing	$2,450.00	5	Whitsundays	Whitsunday Islands
Reef & Whitehaven Landing	5 reviews	GSL Aviation	Scenic Flight	$798.94	5	Whitsundays	Whitsunday Islands
Reef and Island Scenic Flight from Airlie Beach	210 reviews	GSL Aviation	Scenic Flight	$276.27	5	Whitsundays	Whitsunday Islands
Reef Scenic	6 reviews	GSL Aviation	Scenic Flight	$585.60	4.5	Whitsundays	Whitsunday Islands
Return Airport Transfers Airlie Beach to Whitsunday Coast Airport		Whitsunday Transit	Transfers	$36.00		Whitsundays	Airlie Beach
Scenic Flight - Great Barrier Reef, Heart Reef, Whitehaven Beach...	4 reviews	Ocean Rafting	Scenic Flight	$302.94	4	Whitsundays	Whitsunday Islands
Shared Departure Transfer: Airlie Beach or Shute Harbour Hotels to...	2 reviews	Whitsundays 2 Everywhere	Transfers	$22.00	5	Whitsundays	Airlie Beach
Shuttle from Airlie beach to Proserpine airport	6 reviews	Airlie Beach Transfers and Tours	Transfers	$21.34	4.5	Whitsundays	Airlie Beach
Shuttle from Proserpine Airport to Airlie Beach	29 reviews	Airlie Beach Transfers and Tours	Transfers	$21.34	4.5	Whitsundays	Airlie Beach
Stray Australia: Brisbane to Cairns - Freestyle Travel Pass	1 review	Stray Australia	Day/Guided Tour	$685.00	5	Whitsundays	Airlie Beach
Stray Australia: Sydney to Cairns - Freestyle Pass	4 reviews	Stray Australia	Day/Guided Tour	$1,282.10	4	Whitsundays	Airlie Beach
Sunset Cruise Private Charter Hamilton Island		Mars Charters	Cruises & Sailing	$895.00		Whitsundays	Whitsunday Islands
Sunset Sail In The Whitsundays	14 reviews	Explore Group	Day/Guided Tour	$87.18	4.5	Whitsundays	Whitsunday Islands
The Best of the Whitsundays - Afternoon Tour		Airlie Beach Transfers and Tours	Day/Guided Tour	$49.00		Whitsundays	Airlie Beach

Attraction Name	Number Of Reviews	Operator	Category	Price Point	Trip Advisor Rating	Region	Area
The Best of the Whitsundays - Full Day/Guided Tour		Airlie Beach Transfers and Tours	Day/Guided Tour	$90.00		Whitsundays	Airlie Beach
The Best of the Whitsundays - Morning Tour		Airlie Beach Transfers and Tours	Day/Guided Tour	$49.00		Whitsundays	Airlie Beach
Tropical Rainforest & Waterfalls | Eco Experience | Airlie Beach...	57 reviews	Absolute Airlie	Day/Guided Tour	$118.00	5	Whitsundays	Airlie Beach
Whitehaven Beach & Hill Inlet "Chill and Grill"	10 reviews	Cruise Whitsundays	Cruises & Sailing	$235.00	4.5	Whitsundays	Whitsunday Islands
Whitehaven Beach and Daydream Island Cruise	5 reviews	Cruise Whitsundays	Cruises & Sailing	$229.00	4.5	Whitsundays	Whitsunday Islands
Whitehaven Beach and Hamilton Island Cruise	82 reviews	Cruise Whitsundays	Cruises & Sailing	$199.00	4	Whitsundays	Whitsunday Islands
Whitehaven Beach and Hill Inlet Aussie Style + Awesome Beach BBQ with...	784 reviews	Whitehaven Xpress	Day/Guided Tour	$190.00	5	Whitsundays	Whitsunday Islands
Whitehaven Beach and Hill Inlet Chill and Grill	131 reviews	Cruise Whitsundays	Cruises & Sailing	$235.00	4.5	Whitsundays	Whitsunday Islands
Whitehaven Beach and Hill Inlet Lookout Full-Day Snorkeling Cruise by...	369 reviews	Red Cat Adventures	Cruises & Sailing	$189.00	5	Whitsundays	Whitsunday Islands
Whitehaven Beach Half-Day Cruises	140 reviews	Cruise Whitsundays	Cruises & Sailing	$120.00	4	Whitsundays	Whitsunday Islands
Whitehaven Beach Sailing and Snorkeling Cruise	88 reviews	Providence Whitsunday Sailing	Cruises & Sailing	$185.34	4.5	Whitsundays	Whitsunday Islands
Whitehaven Beach Tandem Skydive with beach landing!		Skydive Airlie Beach	Skydiving	$867.63	4.5	Whitsundays	Whitsunday Islands
Whitehaven Heli Tour	21 reviews	GSL Aviation	Scenic Flight	$372.27	4.5	Whitsundays	Whitsunday Islands
Whitsunday Crocodile Safari including Lunch	23 reviews	Whitsunday Crocodile Safari	Cruises & Sailing	$140.00	4.5	Whitsundays	Airlie Beach
Whitsunday Essentials 5 Days Package		Discover Australia	Cruises & Sailing	$929.00		Whitsundays	Whitsunday Islands
Whitsunday Island Boat Adventure	46 reviews	GSL Marine	Cruises & Sailing	$201.60	5	Whitsundays	Whitsunday Islands
Whitsunday Islands and Great Barrier Reef Fishing Charters	35 reviews	Whitsunday Fishing Charters	Fishing Charter	$160.00	4.5	Whitsundays	Airlie Beach
Whitsunday Islands and Reef Scenic Flight - 60 minutes		Fly Australia Charter	Scenic Flight	$249.00		Whitsundays	Whitsunday Islands
Whitsunday Islands and Reef Scenic Flight - 60 minutes + Boat Cruise...		Fly Australia Charter	Cruises & Sailing	$398.00		Whitsundays	Whitsunday Islands
Whitsunday Islands Hopper Pass	10 reviews	Cruise Whitsundays	Cruises & Sailing	$159.00	4	Whitsundays	Whitsunday Islands
Whitsunday Islands Sailing Adventure	122 reviews	Cruise Whitsundays	Cruises & Sailing	$209.00	4.5	Whitsundays	Whitsunday Islands
Whitsunday Islands Scenic Flight - 30 minutes		Fly Australia Charter	Scenic Flight	$199.00		Whitsundays	Whitsunday Islands
Whitsunday Segway Rainforest Discovery Tour	28 reviews	Whitsunday Segway Tours	Day/Guided Tour	$148.27	5	Whitsundays	Airlie Beach
Whitsundays Best 2 Beaches | Whitehaven Beach and Hill Inlet | Beach...	47 reviews	Whitehaven Xpress	Day/Guided Tour	$190.00	5	Whitsundays	Whitsunday Islands
Whitsundays Jet Ski Tour	1,721 reviews	Whitsunday Jetski Tours	Jet Boat/Jet Ski	$110.00	5	Whitsundays	Airlie Beach
Whitsundays Sailing 2-Day Adventure			Cruises & Sailing	$588.39		Whitsundays	Whitsunday Islands
Whitsundays Seaplane Tour Including Great Barrier Reef and Whitehaven...	80 reviews	Air Whitsunday Seaplanes	Scenic Flight	$690.00	5	Whitsundays	Whitsunday Islands
Whitsundays Seaplane Tours	39 reviews	Air Whitsunday Seaplanes	Scenic Flight	$330.00	4.5	Whitsundays	Whitsunday Islands
Whitsundays Segway Sunset and Boardwalk Tour with Dinner	24 reviews	Whitsunday Segway Tours	Day/Guided Tour	$117.34	5	Whitsundays	Airlie Beach
Whitsundays Sunset Sailing Cruise	46 reviews	Providence Whitsunday Sailing	Cruises & Sailing	$75.00	4.5	Whitsundays	Airlie Beach
Whitsundays Three Island Guided Tour	4 reviews	Cruise Whitsundays	Cruises & Sailing	$249.00	4	Whitsundays	Whitsunday Islands

Attraction Name	Number Of Reviews	Operator	Category	Price Point	Trip Advisor Rating	Region	Area
Whitsundays Twin Island Escape	6 reviews	Cruise Whitsundays	Cruises & Sailing	$199.00	4	Whitsundays	Whitsunday Islands
Whitsundays Whale Watching Cruise from Airlie Beach	2 reviews	Ocean Dynamics	Cruises & Sailing	$208.00	3	Whitsundays	Airlie Beach
Wildlife & Rainforest Tour		Airlie Beach Transfers and Tours	Day/Guided Tour	$149.00		Whitsundays	Airlie Beach
Wings Whitsundays - Saloon Single Berth - 2 day 2 night Sailing Tour		Wings Whitsunday Adventures	Cruises & Sailing	$479.00		Whitsundays	Whitsunday Islands
Wings Whitsundays Saloon Single Half of a double bed 2 Day 2 Night...	1 review	Wings Whitsunday Adventures	Cruises & Sailing	$475.00	5	Whitsundays	Whitsunday Islands
ZigZag Whitsundays Day/Guided Tour - Whitehaven Beach - Snorkel - Island...	252 reviews	ZigZag Whitsundays	Day/Guided Tour	$153.34	5	Whitsundays	Whitsunday Islands
ZigZag Whitsundays Tour + 1 Night At Island Resort (including...		ZigZag Whitsundays	Cruises & Sailing	$750.00		Whitsundays	Whitsunday Islands
Taste of Sugar Tour	25 reviews	Sarina Sugar Shed	Day/Guided Tour	$26.00	4.5	Sarina	Mackay
Capricorn Caves Cathedral Cave Tour	39 reviews	Capricorn Caves	Day/Guided Tour	$36.85	4.5	Rockhampton	Rockhampton
1 Day Rockhampton Highlights Private Tour with Pickup		Rockhampton Tours	Day/Guided Tour	$225.65		Rockhampton	Rockhampton
Capricorn Caves Adventure Caving Tour	3 reviews	Capricorn Caves	Day/Guided Tour	$92.31	4.5	Rockhampton	Rockhampton
Capricorn Caves Fossil Tour	4 reviews	Capricorn Caves	Day/Guided Tour	$40.00	5	Rockhampton	Rockhampton