



MACKAY AND
WHITSUNDAYS
TOURISM REGION

PERFECT

FOR

TOURISM
INVESTMENT



Queensland
Government
Australia

MACKAY AND WHITSUNDAYS

Investment highlights

- 1. World-renowned island resort destination** - As the gateway to **74** tropical islands and a number of island resorts, the Whitsundays is a crown jewel of the Great Barrier Reef.
- 2. Maritime opportunities** - The region is establishing itself as a hub for all types of vessels, with a host of marinas supporting cruise ship visitation, a bareboat charter industry, island transfer services and reef day trip experiences.
- 3. Economically diverse** - The unrivalled beauty of the coast, reef, islands and rainforest supports an internationally renowned tourism industry, while agriculture and a resource-rich inland region underpins the economy.
- 4. Development ready** - The Mackay Waterfront Priority Development Area (PDA) provides significant opportunity for investment in tourism related development – a project backed by local government with investment incentive policies in place.

The heart of the Great Barrier Reef

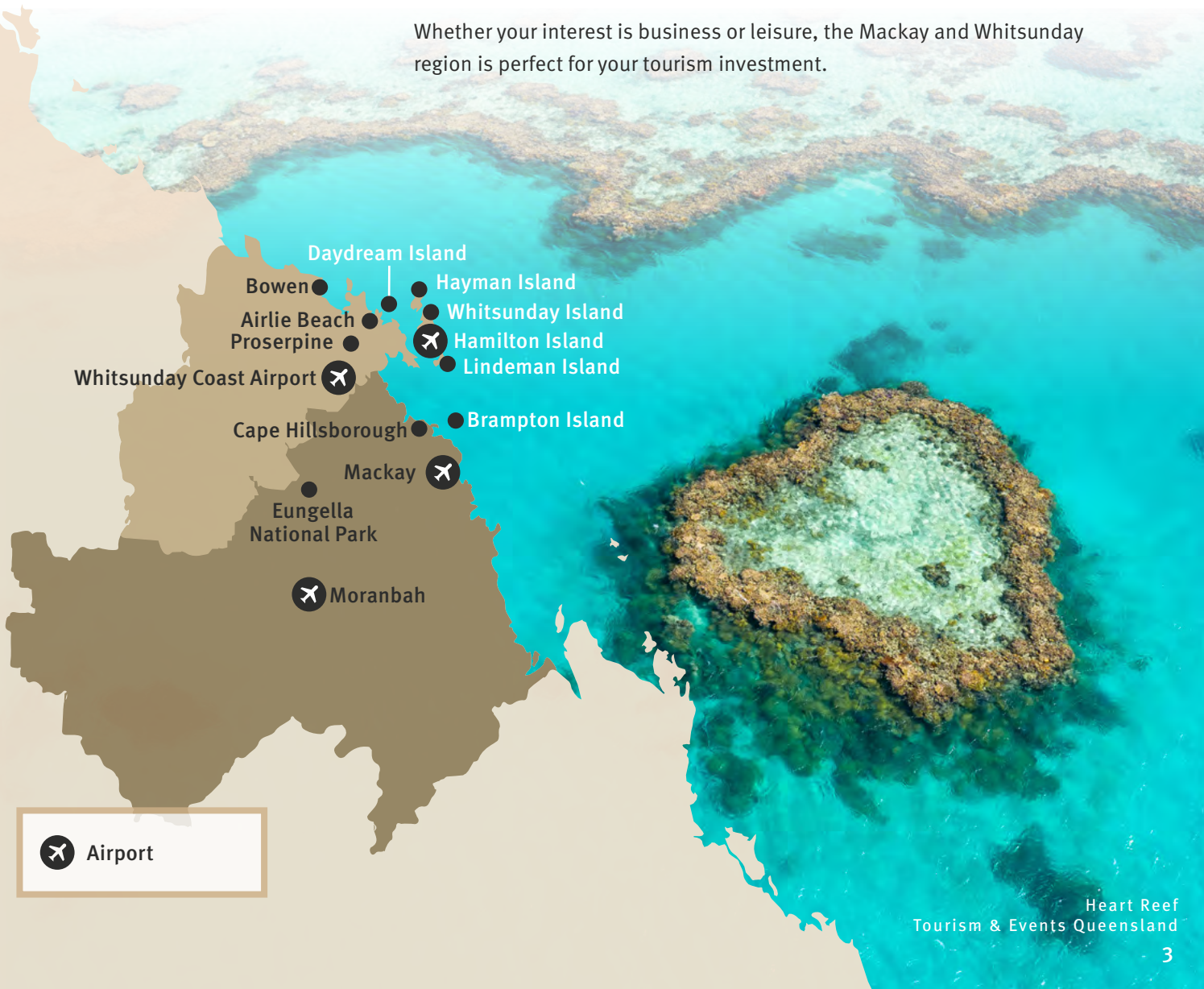


The Whitsunday region is made up of 74 island wonders, located in the heart of the Great Barrier Reef. Offering a combination of luxury island getaways, secluded beaches, adventure escapes, country towns and family-friendly holidays, the region attracts both domestic and international travellers. To the south, unspoilt natural gems like the Eungella Hinterland and Cape Hillsborough, spectacular fishing and boating off the Great Barrier Reef, and a calendar of exciting events, define the region's tourism offering.

Mackay is the major regional city and gateway to the resource-rich deposits of the Bowen and Galilee Basins, which support a thriving business traveller market in the region. The Isaac region and its seven regional towns including Clermont, Dysart, Glenden, Middlemount, Moranbah, Nebo and St Lawrence also boasts of underdeveloped coastline, vast agricultural and grazing pursuits and Australia's largest coal deposit.

To the north, regional hubs at Proserpine, Bowen and Airlie Beach are an eclectic mix of friendly country and coastal towns, supported by agriculture and tourism. Meanwhile the Pioneer Valley and Eungella Hinterland – the largest stretch of sub-tropical rainforest in Australia – are already strong tourist attractors, but currently untapped for tourism product development.

Whether your interest is business or leisure, the Mackay and Whitsunday region is perfect for your tourism investment.



An economic and tourism hub

Combining an internationally recognised tourism destination, with an established agricultural industry and thriving resources sector, the Mackay and Whitsunday region has seen incredible economic growth.

The economic forecast for the region is positive, with both economic and population growth forecast to be driven by strong performance in traditional and emerging industries.

The mining sector has contributed an impressive 47% to the region's economic output compounded by associated service industries such as engineering and manufacturing. Other major drivers have been the construction, transport, postal and warehousing sectors – a testament to the strength and diversity of the economy.

Outside of these industries, of course, is the traditional tourism industry. The Whitsundays is the globally recognised Great Barrier Reef island resort destination, whilst Mackay is growing its reputation as a premier leisure destination offering visitors its own combination of unique island, rainforest and wildlife experiences.



Population

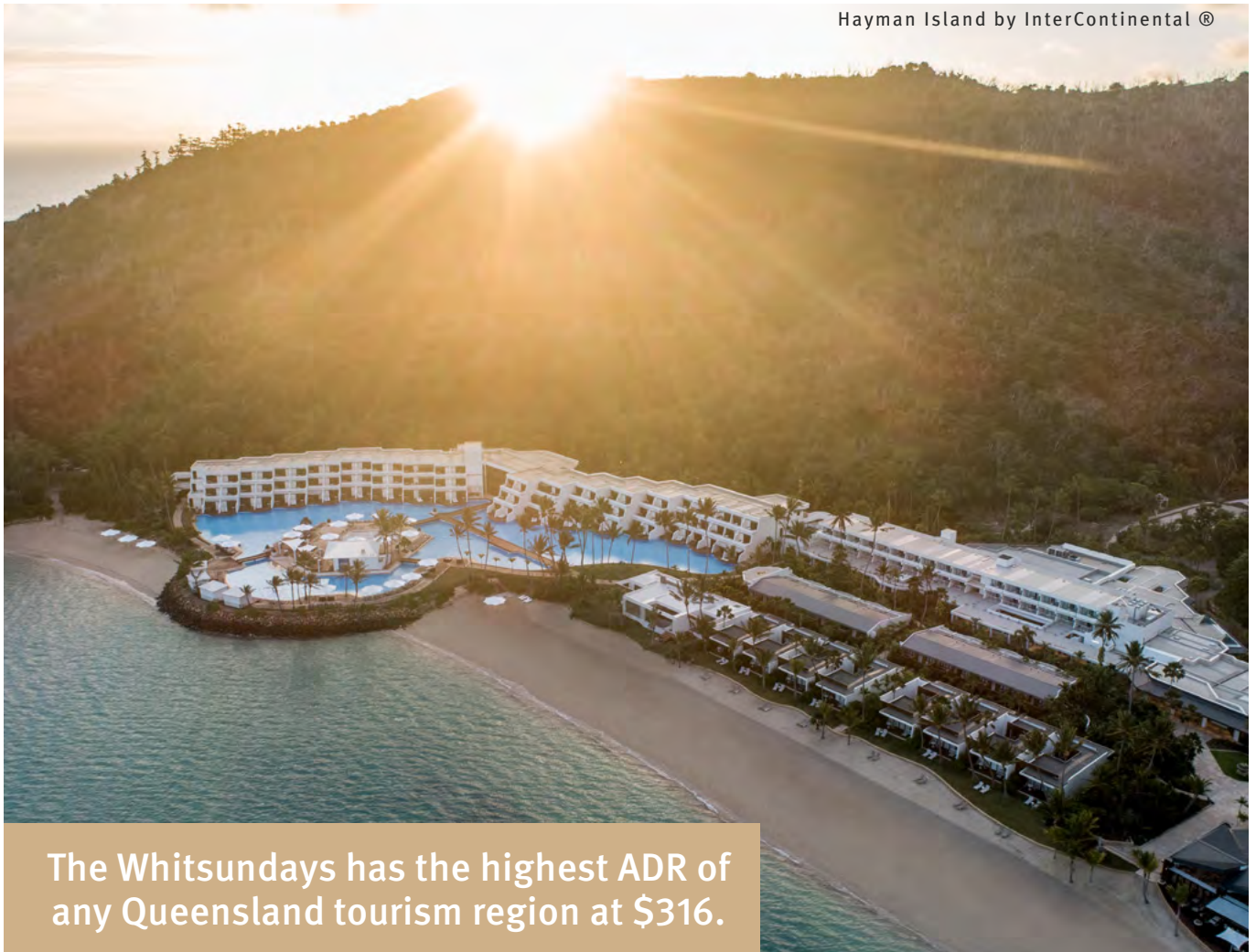
174,816

in 2020

Queensland Government Statisticians Office



Airlie Beach Lagoon
Tourism & Events Queensland



The Whitsundays has the highest ADR of any Queensland tourism region at \$316.

Mackay and Whitsundays accommodation market growth

The accommodation markets in Mackay and the Whitsundays are as diverse as the landscapes that surround them. Mackay's accommodation sector consists mostly of mid-range hotels and motels that cater to business travellers.

The Whitsundays offers a broad range of accommodation options, from five star luxury, family, and activity-based island resorts, to upscale hotels and budget accommodation on the mainland.

Both regions have a range of camping and caravanning options, which cater to the ever growing self-drive and Recreational Vehicle (RV) market. The Whitsunday region achieved the highest ADR of any Queensland tourism region (\$316) in the year ending June 2021, indicating the quality of resort accommodation on offer to the high-value traveller.



ADR Average Daily Rate

\$316 in 2020/21



RevPAR Revenue Per Available Room

\$178 in 2020/21



Occupancy

56% **↑ 1.2%** increase for the year ending June 2021

STR Australian Accommodation Monitor,
Tourism Research Australia (TRA), 2021

Perfectly accessible



Located off Queensland's major coastal road, the Bruce Highway, the Mackay and Whitsunday regions are perfectly accessible for the self-drive and RV travellers who take their time exploring towns along Queensland's famous Pacific coastline.

For those coming from further afield, airports in Mackay, Moranbah, Proserpine (Whitsundays) and on Hamilton Island, make it an even more desirable destination for both business and leisure. Island resort getaways are made easy through connectivity between the region's airports and marinas in Mackay, Airlie Beach, Bowen and Hamilton Island.

These ports are perfectly positioned for bareboat island hopping, passenger ferry services and island resort operations, enabling visitors from around the world to enjoy the Great Barrier Reef.

Recently completed access infrastructure projects

- Upgrade to the Whitsunday Coast Airport in Proserpine
- Shute Harbour restoration
- Hamilton Island Marina terminal upgrades
- South Molle Island jetty reconstruction
- Coral Sea Marina Resort

Mackay Airport



The Great Barrier Reef

The most perfect place on earth

No single Australian natural asset contributes as much in terms of brand and iconic value to the world's perception of Brand Australia as the Great Barrier Reef. The economic, social and iconic value of the Great Barrier Reef is valued at \$56 billion and contributes \$6.4 billion per year to the Australian economy.

Total contribution per year



Australia

\$6.4b → **64,000**
value jobs



Queensland

\$3.9b → **33,000**
value jobs



Great Barrier Reef regions

\$2.9b → **24,000**
value jobs

Deloitte Access Economics, 2017

Perfect for business

Mackay visitation

As the economic hub of the region, Queensland's booming resource industry drives domestic business travel, representing 52% of visitation and a 3.3% trend increase over the three years to September 2021. Overall domestic visitor expenditure to the region is worth \$419 million, and has remained relatively steady (down by a trend rate of 2.5%) over the three years to September 2021.

At the same time, a renewed focus in developing new leisure destinations through projects such as the Keswick Island development, Pioneer Valley Mountain Bike Trail and the Mackay Waterfront Development are set to bring more leisure travel to the region in the years ahead.

Mackay attracts a high volume of business visitors that continues to grow.

Total visitors (Year ending September 2021)

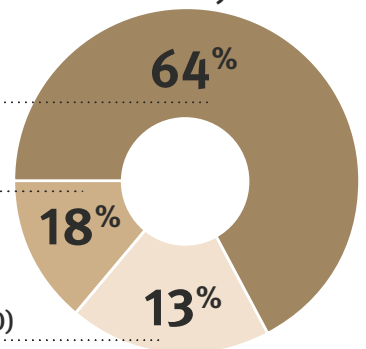


Domestic visitor nights by purpose (Year ending September 2021)

Business (2,281,000)

Holiday (657,000)

Friends & family (460,000)



TRA, 2021



Whitsundays visitation

The Whitsundays is recognised as one of the world's premier holiday destinations, with its collection of exquisite islands and famous resorts. The region is showcased as Queensland's must-visit holiday destination with its iconic natural wonders, such as Heart Reef and Whitehaven Beach, and its array of water sports and leisure activities.

Appealing to a broad range of people, 68% of travellers to the Whitsundays in the year ending September 2021 visited to holiday, as Australians looked to holiday at home throughout the COVID-19 pandemic.

In the three years ending September 2021, annual domestic Overnight Visitor Expenditure (OVE) in the Whitsundays grew by 15.9% on average to a record to \$926.9 million, with visitation increasing by 5.3% on average to 720,000 and spend increasing 10.4% on average to \$315 per night.

Traditionally, most visitors have come from European and UK markets, however more and more visitors are now coming from Asia and the USA. With 44% of Queensland's international visitation coming from Asian markets prior to the pandemic, there is tremendous potential to grow this market in the Whitsundays.

Total overnight visitors (Year ending September 2021)



720k 5.3% growth p/a



68% of travellers visited to holiday

The Whitsundays is favoured by international markets with higher spending travellers.

TRA

Perfect for an iconic holiday



Reef View Hotel, Hamilton Island
Tourism & Events Queensland

International visitors Top four by country of origin



UK



DEU



USA



CHN

Statistics based
on year ending
December 2019

TRA, 2019

Visitors	43,000	30,000	21,000	17,000
Share of market	19.6%	13.6%	9.7%	7.2%
Nights	189,000	112,000	85,000	82,000

Your perfect island experience



The Mackay and Whitsundays' pristine natural environment, easy access and position at the heart of the Great Barrier Reef makes it the perfect spot to create iconic accommodation and experiences. Efforts to redevelop and establish new world-class island destinations that reflect the Reef's long-held position as one of the jewels in Australia's tourism crown are well underway.

Three Whitsundays island resorts reopened in 2019, bringing new refurbished product to the region. Hayman Island by InterContinental and Elysian Retreat, Long Island add to the already sought after luxury offering of Qualia on Hamilton Island. Meanwhile, the refurbished and much-loved Daydream Island Resort caters to the family and activity-based holiday market. There is still potential for development of six additional island resorts dotted across the Mackay and Whitsunday region, with several projects planned.

Added to the island offerings are new Reef and Sleep ventures, committed to creating iconic experiences unique to the Great Barrier Reef. Cruise Whitsundays' recently revamped Reefworld Pontoon offers accommodation that allows visitors to sleep overnight at Hardy Reef – either under the stars on the upper deck or in an exclusive underwater reef suite – giving tourists the opportunity to experience the Reef in new ways.

Rejuvenation of Queensland Island Resorts

Queensland's iconic Great Barrier Reef island resorts are a fundamental ingredient to Queensland's tourism future. The Queensland Government supported the redevelopment of island resorts through the \$25 million Great Barrier Reef Island Resort Rejuvenation Program, which has seen new access infrastructure, green technologies and day trip facilities developed on South Molle, Hamilton, Hayman and Hook Islands in the Whitsundays.





Mainland accommodation

In Mackay, the region's resilient business and growing holiday markets make the region perfect for new hotels. Transactions of the Coral Cay Resort and Mackay Marina Hotel show investors are recognising the potential offer from strong mid-week business occupancy and reliable weekend leisure travel.

Additional beachfront opportunities are currently available for the astute investor, and will benefit from Mackay Regional Council's planned 172 hectare waterfront tourist destination. The greenfield development opportunity is planned to include accommodation, restaurants and nature-based tourist developments, vital to the region's growth.

In Airlie Beach, the opportunities are varied. The expected uplift in demand, fuelled by island resort redevelopments, will ensure the need for continued investment in both family-based and luxury resort offerings on the mainland.

In addition, the \$54.5 million Shute Harbour restoration has laid the groundwork for future investment in the precinct, with potential for hotels and a conference centre to cater to the ever-growing business market.

The beautiful Mackay and Whitsunday region is perfect for your tourism investment, no matter whether your interests are focused on the business, leisure or luxury markets.



Front: Whitsunday Island
Back: Cockermouth Island
Tourism & Events Queensland



The Queensland Government, through the Department of Tourism, Innovation and Sport, provides facilitation support to tourism investors.

Opportunities to invest in Queensland are celebrated and supported, providing a partnership approach for the future.

For more information contact:
Tourism Investment Attraction Unit,
Department of Tourism, Innovation and Sport

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This guide is based on information available at the time of preparation, and it is acknowledged that successive data will be released. All figures and diagrams are indicative only and should be referred to as such. Forecasts or projections may be affected by a number of unforeseen variables, and as such no warranty is given that a particular set of results will in fact be achieved. The Queensland Government shall not accept liability for any reliance on the contents and suitability of this guide, for any purpose. The user accepts all responsibility and risk associated with the use of this guide. Data sources: Australian Bureau of Statistics (ABS), Tourism Research Australia (TRA), STR Accommodation data.

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