



EARTHCHECK

The Whitsundays Region Destination Management Plan

2024 – 2028

April 2024

Version – 2

Date – 8 April, 2024

Prepared by – Eliza Tompkins

Verified by – Stewart Moore

Project prepared for



Delivered by



EARTHCHECK

Acknowledgement of Country

Tourism Whitsundays acknowledges the Gia, Ngaro, Juru, Jangga and Birriah people, the Traditional Custodians of the beautiful Whitsundays region, and recognise their ongoing connections to land, sea and community. We pay our respect to Elders past, present and emerging.

Disclaimer

The information and recommendations provided in this document are made on the basis of information available at the time of preparation and the assumptions outlined throughout the document. While all care has been taken to check and validate material presented in this report, independent research should be undertaken before any action or decision is taken on the basis of material contained. This report does not seek to provide any assurance of project viability and EarthCheck accepts no liability for decisions made or the information provided in this report.

Cover Page Image, and all images within this report are courtesy of Tourism and Events Queensland

Icons used in document sourced from Flaticon <https://www.flaticon.com/>

01 – Foreword

Message from Julie Telford, Chair of the Board, Tourism Whitsundays

As Chair of the Board of Tourism Whitsundays, I am delighted to introduce our latest Destination Management Plan (DMP) for the Whitsundays region. This comprehensive plan outlines a strategic approach to harness the full potential of our breathtaking region over the next five years. Our commitment to sustainable and responsible tourism development remains unwavering, recognising the invaluable contributions of the Gia, Ngaro, Juru, Jangga, and Birriah people, the Traditional Custodians of our lands and waters.

The insights gained from the recent challenges, particularly COVID-19, underscore the importance of adaptability, resilience, and collective action. By fostering partnerships across government, community, and industry stakeholders, we aim to optimise economic returns while upholding community values and enhancing visitor experiences. Our vision encapsulates not just the enhancement of our brand's global stature but also a steadfast commitment to environmental stewardship, accessibility, and the promotion of our unique cultural heritage.

Message from Rick Hamilton, CEO, Tourism Whitsundays

It is with pleasure that I unfold our strategic direction through the Destination Management Plan, laying out a path for the next five years. This plan is a testament to our resilience through recent global challenges and underscores our unwavering commitment to sustainable growth. By capitalising on the remarkable domestic market boom and strong growth, we see seasonal periods return, outbound capacity increasing and international visitation still short of 2019, we must continue to enhance and refine our brand positioning, develop new products and seek the resources required for continued growth, aiming to drive sustainable development across our tourism sector. Our initiatives focus on enhancing infrastructure, boosting accessibility, and aligning our offerings with evolving market demands, ensuring that we remain at the forefront of destination excellence.

A key pillar of our strategy involves the pursuit of sustainable funding mechanisms to secure our future and support the ambitious 2032 targets set by the state government. These targets not only underscore the importance of economic vitality but also emphasize our responsibility toward environmental stewardship and sustainable practices. By fostering collaboration across all sectors and embracing innovative solutions, we're setting the stage for a future where the Whitsundays not only thrives as a premier global destination but also leads by example in sustainable and responsible tourism. Our vision extends beyond immediate gains, aiming to secure the Whitsundays' legacy as a beacon of sustainability and excellence, ready to welcome the world with open arms in the lead-up to 2032 and beyond.

02 – Executive Overview

Executive Overview

The Destination Management Plan (DMP) provides an opportunity to set a clear direction for tourism in the Whitsundays over the next five years. It provides a whole of region framework for action which will require all key stakeholders (community, operators, and all parts of government) to play a part in delivery.

The plan builds on the strategic marketing platform outlined in the 2019 DMP report¹. The vision, mission and brand promise remain in place.

One of the key lessons from COVID-19 is that while the plan has a five-year horizon it will need to be updated at regular intervals to allow the destination to remain competitive, resilient, and responsive to changing social, environmental, and economic conditions. Business adaptability will be particularly important to assist the region to respond to and manage climate change and extreme weather events. The plan includes guidelines for how to plan for, and manage, risk, climate change, decarbonisation, and accessibility.

COVID-19 provided the Whitsundays with a captive national domestic market which delivered supernormal visitation and spend over an 18-month period.

The region essentially doubled its 2019 domestic overnight spend without the benefit of international visitation. The destination is now well placed to build on the strength and awareness of its brand in domestic markets and the return of its international markets. This presents a rare opportunity to continue to move forward from a position of strength.

The brand research from Tourism & Events Queensland has highlighted the strong brand equity and awareness that the Whitsundays region has for delivering iconic reef and island experiences. It also highlights that the region is well positioned in key consumer markets (Queensland, Melbourne, and Sydney) as being salient (well-known), meaningful and unique.

The research indicates that further work is needed to strengthen products and services associated with adventure, nature, and wildlife experiences particularly on the mainland. What the research does not address is the need to ensure that the quality of service, mix of attractions and the delivery of the guest experience stays aligned with market expectations and the current price levels which are being achieved. This issue is addressed in the DMP and will need to be carefully monitored.

The region is now returning to more normal pre-COVID trading conditions and there is an opportunity to regroup across the destination and establish a new set of sustainable growth targets along with a development and marketing plan which can build on the successes achieved during COVID.

¹ The Whitsundays Destination Tourism Plan 2019-2024

The regional consultation program supported the view that effective management of the tourism industry will now require the collaboration of all parties, including government, businesses, and communities, to ensure sustainable and responsible tourism development can be achieved in the long run. All stakeholders were interested in understanding their role in this process.

82 % of the community currently see tourism as having a positive impact on the community as a whole. A key role of the DMP is to provide a plan which can optimise the economic returns achieved from tourism while meeting community expectations on lifestyle and wellbeing.

If the region is to maintain its current strong domestic market profile and rebuild its international markets post Covid it will need increased marketing funds and new ways of seeking dedicated revenue in the long term. Partnership agreements are now required with key government and industry stakeholders together with a review of industry funding models.

The Queensland Government has established a set of aspirational state level targets for the industry as whole. They have been developed around "overnight visitor expenditure" (OVE) which is a broad measure across all forms of tourism purpose. The DMP puts forward some recommendations on what actions and investment will be required for the region to meet the aspirational targets.

The challenges and issues associated with climate change and sustainability were consistently identified throughout the process of developing this DMP. Climate change is one of the greatest challenges facing tourism across the world and its impacts, including extreme weather events and coral bleaching, pose a significant threat to the Whitsundays tourism industry.

The Queensland State Government has set clear and ambitious climate change targets with an intended dual outcome of reducing carbon emissions while creating new jobs. At the local level, the Whitsunday Regional Council has also released a Climate Mitigation Strategy which outlines the priority actions that the region will undertake to reduce their emissions. Both the state and the local action plans provide a pathway to net zero which will need to be factored into destination management.

Guiding Principles

Four guiding principles have been put forward to support the DMP. They can be used to help make consistent and sound choices when planning and investment opportunities or actions are put forward:

1. **Get the basics right** (quality product, service skills, client satisfaction and yield management).
2. **New investment in tourism infrastructure, attractions, storytelling and local events** are needed to bring the region to life and support dispersal.
3. **Integrated transport is essential.** An efficient and integrated transport platform (air, road, and sea access) is needed together with new regional funding partnerships and agreed performance outcomes.
4. **Sustainability and lifestyle** need to sit at the heart of the destination brand.

What does success look like?

The following measures of success were put forward by key stakeholders.

1. **Brand enhancement and development.** The continued enhancement of The Whitsundays brand “The Heart of The Great Barrier Reef”.
2. **Significant increase in long-term sustainable funding** is required to support 2032 aspirations. Long term agreed funding plans in place.
3. **A regional investment prospectus** is in place. Major new investment provides a springboard for growth on the islands and mainland.
4. **Greater dispersal of visitation** across the region. Acknowledging that Airlie Beach and the Whitsunday Islands are the tourism heartbeat of the region and using these gateways to encourage geographic and seasonal dispersion.
5. **Maintain visitor spend** through managed visitor expectations, an increase in length of stay, yield from targeted markets, and strong visitor satisfaction.
6. **An accessible and connected region.** A seamless and efficient transportation network that allows people to move easily and conveniently within the region. This concept goes beyond just physical connectivity; it also encompasses digital connectivity and mobility.
7. **A resilient region.** Risk and resilience strategy development and hospitality service training in place.
8. **Regional stories and experiences** come to life through local events and attractions and reflect partnerships with First Nations People.
9. **A strong community sentiment** supports the view that the destination is a good place to live, work and visit.
10. **Recognised as a low-carbon destination**, and a leader in sustainability and regenerative tourism². Development of a clear sustainability strategy which positions operators for global recognition for their commitment to responsible tourism.
11. **Pre- and post-Olympic travel** plans and packages in place that build off the strength of the Whitsunday’s brand and position the region as a must-do holiday destination.

² Regenerative tourism is a process where tourism sector stakeholders, collectively, exert care and guardianship (through decision-making and practices) for the improvement and enhancement of natural, human and human-made elements when moving to, visiting, living or operating in a destination.

Destination Management Plan - Strategy

Vision

To showcase the Whitsundays as the globally recognised Great Barrier Reef destination famous for its natural environment and lifestyle.

Mission

To promote and market the destination globally, driving sustainable growth, visitor dispersal, and visitor spend in the region, and supporting the safeguarding of the region's unique lifestyle and natural environment.

Goal: To increase The Whitsundays overnight visitor expenditure to \$2.1b in line with the 2032 Queensland Tourism Strategy

Strategy Areas: Destination Marketing | Destination Stewardship | Product and Experience Development

Guiding Principles

1. Get the basics right (quality product, service skills, client satisfaction, yield management).
2. New investment in tourism infrastructure, attractions, storytelling and local events is needed to bring the region to life and support dispersal.
3. Successful tourism in the Whitsundays will require an efficient integrated transport platform (air, road and sea access), new regional partnerships and agreed performance outcomes.
4. Sustainability and lifestyle need to sit at the heart of the destination brand.

Actions - 15
Priority Projects - 15

Performance Indicators

Brand and destination awareness

Visitor expenditure and length of stay

Community sentiment and visitor satisfaction

Increase in tourism economic value (GRP)

Sustainability benchmarks

New products, experiences and events

Employment in tourism

The Whitsundays Aspirational Visitation Target 2032

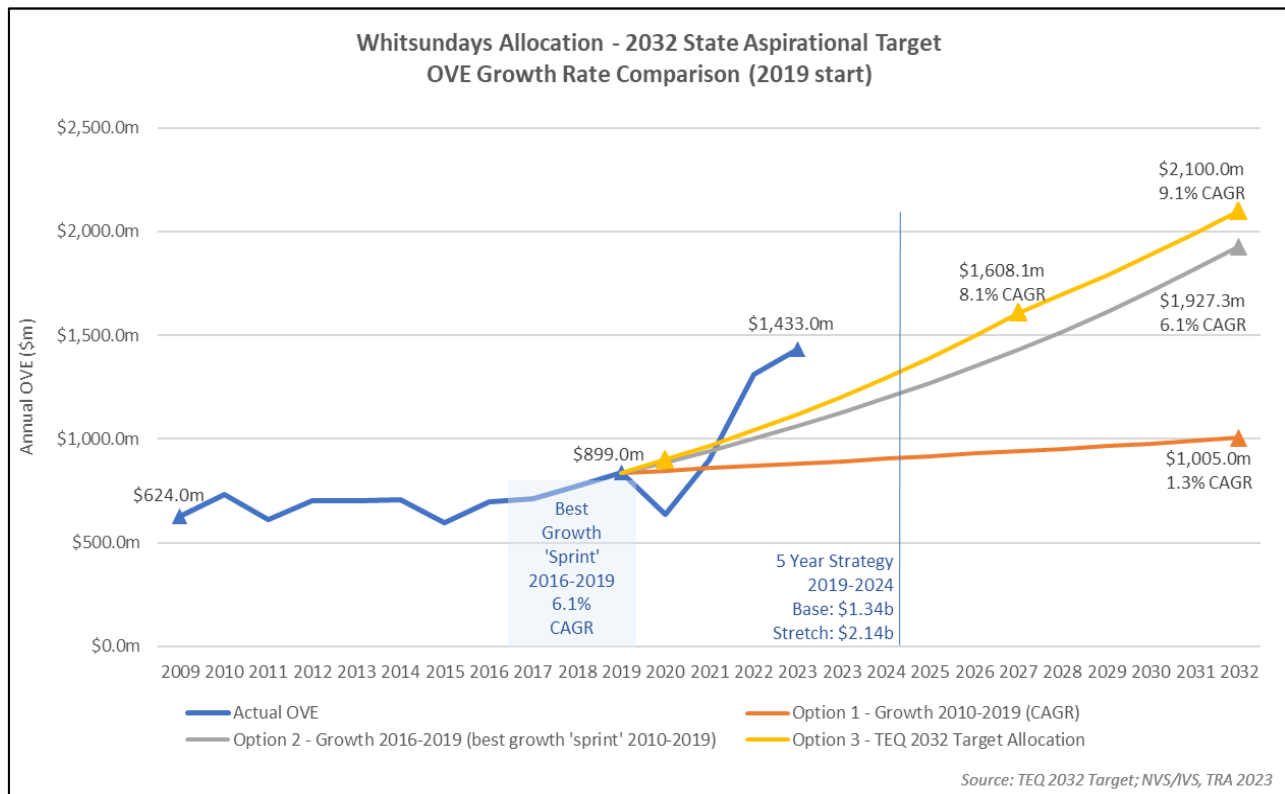


Figure 1: Whitsundays Allocation of State Aspirational Target.

Through this DMP the Whitsundays will play an active role in its support of the actions and targets outlined in the State tourism plan (Figure 1) – *Towards 2032: Reshaping Queensland's visitor economy to welcome the world*. The Whitsundays region contribution is dependent on several variables:

- Destination visitation figures continue their strong growth track exceeding 2019 figures year-on-year to 2028:
- The substantial increase in Queensland intrastate travel experienced during the pandemic is managed to maintain growth numbers.
- The substantial increase in interstate visitation from New South Wales and Victoria seen during the pandemic is managed to maintain growth numbers.
- The Whitsundays retains access to its current level of annual State and Local Government funding.
- The Whitsundays receives additional state and local government funding to expand marketing activities, attract investment and development opportunities, focus on experience development, and undertake advocacy activities.
- The region builds back and continues to grow its pre-2019 share of pre-pandemic visitation from Asia (specifically including China), Europe (in particular, German, and Scandinavian markets), the United Kingdom, and North America.
- Visitation growth factors are even across the State.

Situational Analysis

The following key challenges and opportunities were identified by stakeholders through the consultation process.

A full SWOT analysis and breakdown is included in Appendix 3.

Key Challenges	Key Opportunities
Adequate funding for destination marketing and management activities	Pipeline for investment through the development of an investment prospectus
Price of products and services in the region	Development of new mainland nature and ecotourism experiences
Gap in year-round land-based activities	Indigenous tourism partnerships and products
Barriers to investment and development approvals for major tourism projects	New regional major events and festivals strategy in place
Staffing and accommodation availability and affordability	Aviation access and drive market strategy
Focus and prioritisation on key markets	The Whitsunday Skyway project
Clarity surrounding roles and responsibilities of all key stakeholders in the region	Great walks and mountain bike trails-adventure and ecotourism
Risk and resilience (Climate change, extreme weather, coral bleaching, media coverage)	Themed tourism road loops and signage
Managing the return of cruise ships	Agritourism products
Sustainable tourism including decarbonisation and net zero targets	Additional funding for destination marketing and management activities
Accommodation investment needed (5-star hotel)	2032 Summer Olympics in Brisbane (pre/post-holiday destination)
New regional experiences and attractions	Dedicated convention facility on the mainland
Tourism priority roads network/signage	Service training for staff
Impacts of short-term rentals (Airbnb, Stayz. etc.)	Sustainability accreditation



Priority Projects

Consultations with industry stakeholders identified 15 priority projects.

- 1. The Whitsundays Skyway project.**
- 2. Investment prospectus in place** (local and state government support for inviting investment, aligned to the state aspirational target supply/demand analysis³ which identified the need for 1,500+ rooms by 2032).
- 3. Integrated transport and region-wide major festival and events strategy.**
- 4. 5-Star resort and convention facility on the mainland.**
- 5. Whitsunday Coast Regional Airport** – Support WRC to sustainably grow domestic aviation routes.
6. Bowen Masterplan (including marina development, foreshore upgrades, Flagstaff Hill)⁴.
7. Airlie Beach upgrades - improvements to main street facilities to reflect a world class destination.
8. Reef education and training facility.
9. Super yacht infrastructure and facility development⁵.
10. Ecotourism strategy (mountain biking, hiking including the Ngaro Track, camping).
11. Shute Harbour Marine Terminal – stage 2 development⁶.
12. Customer Service Heroes training⁷.
13. Paddock-to-plate and agritourism in Bowen.
14. Coal Face Experience lift facilities in Collinsville.
15. Lake Proserpine stage 2 development⁸.

Note that some of the abovementioned projects are catalytic to the region and the tourism industry. It is acknowledged that not all are within the direct control or mandate of Tourism Whitsundays. Partnerships will be required with government agencies and the private sector.

³ Regional market assessment & forecasting for input into DMP development – Whitsundays – BDA, 2024

⁴ Whitsundays Regional Council – Bowen Masterplan 2021

⁵ Queensland Superyacht Strategy 2018-2028

⁶ Shute Harbour Marine Terminal Annual Performance Plan 2022-2023

⁷ Customer Service Heroes Program created by 8 Seconds.

⁸ Lake Proserpine Master Development Plan (March 2021)

Key Performance Indicator's

Based on a balanced score-card approach for measuring the impact of tourism and aligned to the UNWTO's 2024 *Statistical Framework for Measuring the Sustainability of Tourism*⁹, the following indicators will be tracked, with 2023 setting a benchmark measure to monitor over the lifespan of the DMP.

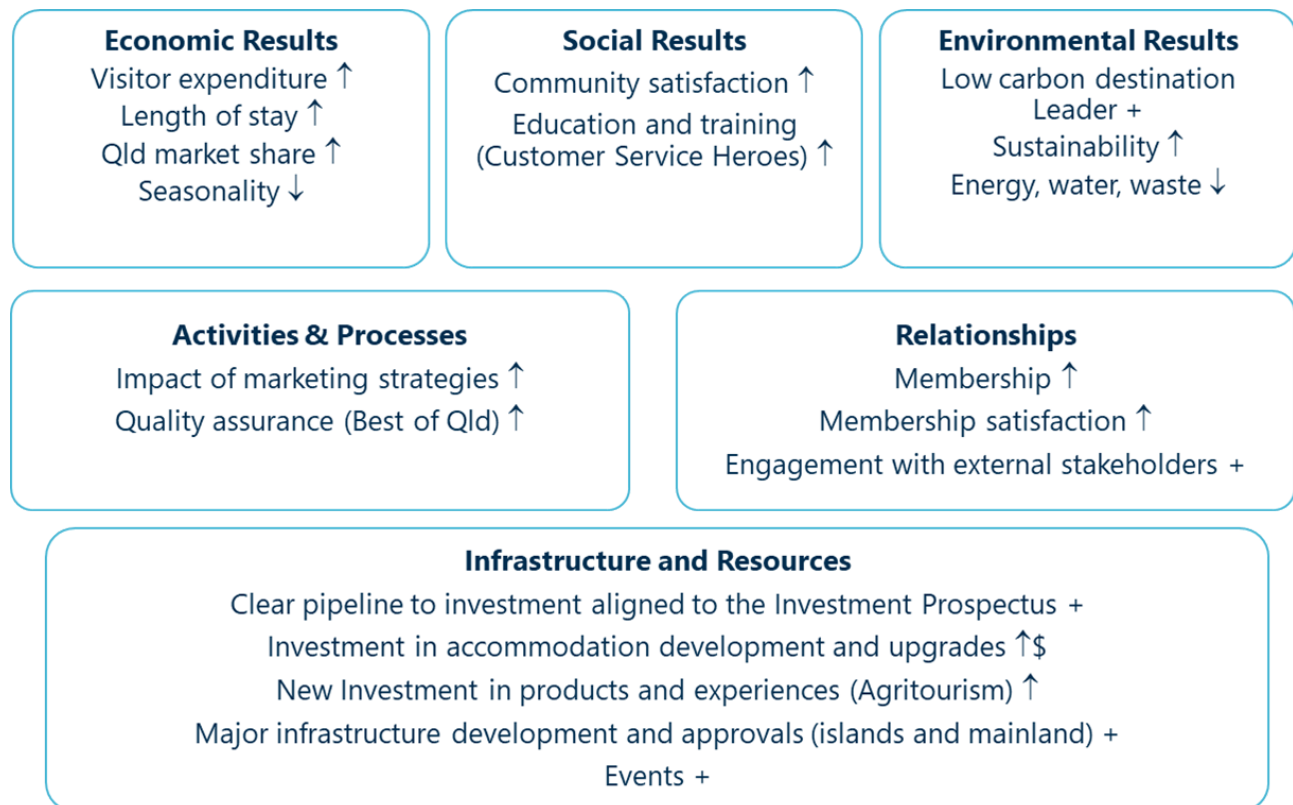


Figure 2: Key Performance Indicators

Recommended Targets

Overnight Visitor Expenditure (OVE)

- Increase Overnight Visitor Expenditure to \$2.1 billion.

Yield

- Balance visitor yield (maintain a higher expenditure growth rate than visitor growth rate).

Domestic Holiday Visitors

- Increase 'Short Break' (4-7n) share to 54%¹, broken down as:
 - Intrastate Short Break (4-7n) share to 50%

⁹ UNWTO *Statistical Framework for Measuring the Sustainability of Tourism. 2024.*
https://unstats.un.org/UNSDWebsite/statcom/session_55/documents/BG-4a-SF-MST-E.pdf

- Interstate Short Break (4-7n) share to 68%

Note: Supporting data can be found in Appendix 4.

- Increase Older SINKs/DINKs market share to 33.5%², broken down as:

- Intrastate Older SINKs/DINKs share to 30%
- Interstate Older SINKs/DINKs share to 37%

Note: Supporting data can be found in Appendix 5.

International Holiday Visitors

- Increase focus and budget to establish European source market dominance within High Value Travel(er) to Australia.
- Increase attraction of Eastern source markets through emphasis on destination-of-choice for Europeans with the aim to increase national share of the visitor markets below³:

↑ UK visitors to 20.0%

↑ German visitors to 25.0%

↑ Scandinavian visitors to 25.0%

↑ Western Markets visitors to 20.0%

↑ Eastern Markets visitors to 3.0%

Note: Supporting data can be found in Appendix 6.



Roles & Responsibilities

	Market research	Investment in infrastructure	Experience development	Events	Advocacy	Marketing	Visitor information services	Managing Capacity
State Government agencies <ul style="list-style-type: none"> Transport and Main Roads Department of Environment, Science, and Innovation Queensland Parks & Wildlife 		X						X
Great Barrier Reef Marine Park Authority Manages all the activities undertaken in the Marine Park in accordance with the Marine Park Plan.	X	X					X	X
Tourism & Events Queensland Lead agency for tourism in Queensland, with key roles of promoting destination Queensland to a global market and provision of funding and support to RTO's.	X		X	X		X		
Tourism Whitsundays One of the thirteen Regional Tourism Organisations as recognised by Tourism and Events Queensland. TW's key priority areas are focused on driving visitation to the destination and building and maintaining a healthy and sustainable tourism economy.	X		X	X	X	X	X	
Whitsunday Regional Council Infrastructure management (including Shute Harbour and Whitsunday Coastal Airport) and event development. Funding support for marketing and events management.		X		X				X
Queensland Tourism Industry Council Voice of tourism. Advocacy and industry development.					X			X
Tourism Industry Associations Local and national tourism associations, with advocacy and industry partnership roles. e.g., QHA, AHA, AMPTO, etc.					X			
Tourism Operators and Private Sector Delivering destination experiences.		X		X	X	X		

Action Plan

Destination Marketing

Aim: To position the region as the globally recognised Great Barrier Reef destination, and the destination of choice for the best reef, nature, and marine tourism experiences.

ACTION	LEAD (L) & PARTNER (P)	TIMEFRAME
<p>1.</p>	<p>Brand enhancement and development.</p> <ul style="list-style-type: none"> <p>Action 1: Continue to develop and enhance The Whitsundays’ brand - The Heart of the Great Barrier Reef - both in creative design, and the continued investment in marketing activities that aligns with, and supports the growth of, the Whitsunday region’s diverse industry.</p> <p>Aim: Continued brand development that connects with target audiences and authentically represents the region.</p> <p>Action 2: Continue to develop and deliver brand training materials and programs (including guides, recorded webinars, and marketing mentorship) for tourism businesses and operators to facilitate brand understanding and engagement.</p> <ul style="list-style-type: none"> Workshops should be held to guide operators and businesses through the brand, and actionable steps that they can take to express the brand through their operations and marketing activities. Brand Playbook, Xcelerator program and Brand Ambassador program to be maintained. Website data maintenance and data monitoring should be updated to help track performance. Develop a marketing mentorship program that pairs small – medium businesses with businesses that are well established Whitsundays brand stewards. <p>Aim: Continue to build and maintain strong brand alignment and engagement across the region.</p> <p>Action 3: A new partnership agreement needs to be put in place with WRC to agree on brand alignment and the role and responsibilities for marketing and promotion of the destination.</p> <p>Aim: Alignment on brand messaging and promotion of the destination.</p> 	<p><i>Year 1 – ongoing</i></p> <p><i>Year 1 – ongoing</i></p> <p><i>Year 1 - ongoing</i></p>
<p>2.</p>	<p>Development and delivery of a new festival and major event strategy.</p> <ul style="list-style-type: none"> <p>Action 1: Collaboration with the Whitsunday Regional Council to refresh and further develop the region’s current event strategy (2019-2023). The event strategy needs to identify region-wide established events and map opportunities and sites to encourage and foster new events.</p> <p>The strategy should clearly identify how the region will support events through funding, marketing, and continuation of the event</p> 	<p><i>Year 1 - ongoing</i></p>

ACTION		LEAD (L) & PARTNER (P)	TIMEFRAME
	<p>Increased funds for destination marketing will be required to successfully maintain current visitor yield, drive overnight stays and facilitate the state's aspirational growth target.</p> <p>A review is needed of current funding sources and the identification of opportunities for accessing additional funding for destination marketing, product development and investment in new tourism services and infrastructure.</p> <p>Aim: Obtain sufficient funding for destination marketing and management activities to support tourism growth in the region.</p>		
2.	<p>Regional investment prospectus in place.</p> <ul style="list-style-type: none"> Action 1: In partnership with the Whitsunday Regional Council and the Department of Tourism and Sport, develop an investment prospectus to map, communicate, and encourage investment in accommodation facilities and tourism attractions on the islands, and within the wider region. The prospectus should include a supply and demand analysis supported by data, and mapping of identified sites and supporting information. <ul style="list-style-type: none"> Project facilitation is needed by the State Government. <p>Aim: Dedicated state and local government investment support for the identification and approval of development proposals.</p>	<p>L: WRC P: DTS, TW</p>	<p>Year 1-2 and ongoing</p>
3.	<p>Integrated regional tourism transport strategy.</p> <ul style="list-style-type: none"> Action 1: In partnership with the Whitsunday Regional Council and the State Government, develop an integrated tourism transport strategy that maps and manages transport access and infrastructure across the region. This includes the aviation, marine, and regional road networks. <ul style="list-style-type: none"> The plans for all transport sectors generally exist. What is needed is a focus on how they work together to support the access and travel needs of visitor markets to the region. <p>Aim: To develop and maintain a strategic approach to delivering an integrated regional tourism transport strategy for the destination.</p>	<p>L: WRC P: TW, TMR, GBRMPA, State government depts.</p>	<p>Years 1 – 3 and ongoing</p>
4.	<p>Development of tourism infrastructure and event services in key tourism precincts.</p> <ul style="list-style-type: none"> Action 1: Regional collaboration and resources are needed to support the ongoing development of dedicated tourism precinct plans in key tourism gateways across the region. This would include further development of: <ul style="list-style-type: none"> The Greater Airlie Beach Masterplan The Bowen Marina Masterplan Superyacht Infrastructure and moorings Shute Harbour Marine Terminal <p>Aim: To ensure that all precincts deliver a world class experience and adequately cater to visitor needs and expectations.</p>	<p>L: WRC P: TW, State government depts.</p>	<p>Years 1 – 3 and ongoing</p>

ACTION	LEAD (L) & TIMEFRAME PARTNER (P)	
<p>5.</p>	<p>Regional tourism climate and risk management action.</p> <ul style="list-style-type: none"> • Action 1: Collaboration with the Whitsunday Regional Council to provide tourism industry related advice, expertise, and perspectives to further support the implementation and execution of the council's Climate Change Mitigation Strategy. <p>The collaboration should identify and examine genuine and effective ways that the tourism industry can align and deliver on WRC's identified strategic outcomes, targets, and actions. This includes working together to continue the incredible work being done through the Whitsundays Healthy Heart project.</p> <ul style="list-style-type: none"> ○ A carbon footprint has been established for the destination, and a decarbonisation pathway has been put forward to guide what action is needed to reduce the region's footprint (see Section 5 of this DMP). ○ The Whitsundays region should look to obtain Sustainable Destination Certification to recognise the work that has been undertaken and identify ways that TW and WRC can further collaborate to improve the region's climate action. ○ Where possible, establish tourism industry representation in the Local Disaster Management Group to contribute to the Local Disaster Management Plan. <p>Aim: Establishing tourism industry support for the regional Climate Change Mitigation Strategy, and to position the Whitsundays as a leader in climate change and sustainability.</p>	<p>L: WRC P: TW, TEQ, DESI, DTS</p> <p>Years 1 - 2</p>
<p>6.</p>	<p>The management and regulation of short-term accommodation</p> <ul style="list-style-type: none"> • Action 1: Collaboration on the management of short-term rental accommodation (STRA) in the region. <ul style="list-style-type: none"> ○ Short-term rental accommodation (STRA) refers to accommodation that falls in-between visitor accommodation (e.g., hotels) and more formal long-term accommodation arrangements (e.g., property rentals). ○ An important issue that has been raised in the region is the impact of STRA on housing affordability and availability. This includes the key question of whether STRA is having a fundamental impact on housing supply. <p>The Whitsunday Regional Council has recognised the need to act and has implemented a number of initiatives to manage the impacts of STRA. Tourism Whitsundays and the WRC should work together to determine how STRA can be better managed to support the wider aims of tourism management in the region.</p> <p>Aim: Understanding the impacts of STRA in the region, and the potential of STRA to further support destination management.</p>	<p>L: WRC P: TW, DTS</p> <p>Year 1 – 2</p>

Products and Experience Delivery

Aim: A vibrant, sustainable, and connected region delivering worldclass transformational products and experiences that benefit the whole community.

ACTION		LEAD (L) & TIMEFRAME PARTNER (P)	
1.	<p>Experience development strategy.</p> <ul style="list-style-type: none"> • Action 1: Undertake a regional experience development and accessibility strategy. The strategy would include: <ul style="list-style-type: none"> ○ Audit and Identification of hero experiences. ○ Review and mapping of the region’s current, and planned, accessible experiences based on the implementation of Travability’s recommendations. ○ Establish product clusters and identify strategies for development and marketing of each cluster. ○ Identify and maintain the integrity of the region’s traditional key nature and adventure experiences. These experiences (e.g. snorkelling on the GBR) are essential elements to The Whitsundays’ brand and form the foundation of the region’s identity. ○ Identify key messages, communication channels, and storytelling avenues, and provide industry training and support. <ul style="list-style-type: none"> ▪ Part of the communication approach should include publishing an accessibility guide on the Tourism Whitsundays website to help share and promote accessible travel options across the region. <p>Aim: Strategic understanding and approach to managing and developing the region’s iconic experience offerings and establishing accessibility at the heart of the region.</p>	<p>L: TW P: TEQ, WRC, Industry & operators</p>	<p>Years 1-2</p>
2.	<p>Nature based tourism and eco-tourism strategy.</p> <ul style="list-style-type: none"> • Action 1: The development of a nature based and ecotourism strategy in alignment with the State government’s <i>Ecotourism Plan for Queensland’s Protected Areas (2023–2028)</i>. As part of the strategy, frameworks should also be established for: <ul style="list-style-type: none"> ○ Citizen science and education programs ○ First Nations experiences and products ○ Hiking and mountain biking trails ○ Reef education and training facility <p>These experience options are discussed in the wider DMP report.</p> <p>Aim: To establish the Whitsundays as a leading ecotourism destination.</p>	<p>L: WRC P: TW, TEQ, DESI, QLD Parks, TO’s</p>	<p>Years 1 - 3</p>
3.	<p>Development of a regional agritourism strategy.</p> <ul style="list-style-type: none"> • Action 1: Develop a cross-regional agritourism strategy. <p>Phase 1: Research & Development</p>	<p>L: TW P: WRC, MIW, State government</p>	<p>Years 1 -2 and ongoing</p>

	<ul style="list-style-type: none"> Review the agritourism landscape, opportunities, barriers to entry, and support available in alignment with the <i>National Agritourism Strategy Framework (Agritourism 2030)</i> and the <i>Queensland Farmer’s Federation Agritourism Roadmap (2020)</i>. <p>Phase 2: Partnership Agreements & Strategy Development</p> <ul style="list-style-type: none"> Agritourism and farm-to-table experience strategy is created, clearly establishing the pathway for the development of the product. <p>Phase 3: Product Development</p> <ul style="list-style-type: none"> Product development: <ul style="list-style-type: none"> farm gate experiences farm-to-table dining experiences farmers markets agritourism trails <p>Aim: Development of a regional an agritourism strategy.</p>	<i>depts., Industry & operators</i>	
4.	<p>Quality service – Customer Service Heroes Program</p> <ul style="list-style-type: none"> Action 1: Adoption and wide-spread implementation of the Customer Service Heroes Program¹⁰. <p>Aim: Establishing a unified approach to providing high-quality customer service across the region, ensuring consistent value is provided on the ground.</p>	<i>L: TW P: Industry & operators</i>	<i>Year 1 - ongoing</i>

Acronym Reference List

Acronym Reference List
ATDW - Australian Tourism Data Warehouse
DESI - Department of Environment, Science, and Innovation
DTS - Department of Tourism and Sport
GBR - Great Barrier Reef
GBRMPPA - Great Barrier Reef Marine Park Authority
MIW - Mackay Issac Whitsunday (Greater Whitsunday Alliance)
TA - Tourism Australia
TEQ - Tourism and Events Queensland
TMR - Department of Transport and Main Roads
TO - Traditional Owner(s)
TW - Tourism Whitsundays
USP - Unique selling proposition
WRC - Whitsunday Regional Council

¹⁰ Customer Service Heroes Program created by 8 Seconds.

Contents

01 – Foreword	1
Message from Julie Telford, Chair of the Board, Tourism Whitsundays	1
Message from Rick Hamilton, CEO, Tourism Whitsundays	1
02 – Executive Overview	2
Executive overview	2
Guiding Principles	3
What does success look like?	4
Destination Management Plan - Strategy	5
The Whitsundays Aspirational Visitation Target 2032	6
Situational Analysis	7
Priority Projects	8
Key Performance Indicator's	9
Recommended Targets	9
Roles & Responsibilities	11
Action Plan	12
03 – Introduction	21
04 – Setting the Scene	23
Alignment to Local, State and Federal Strategy and Plans	23
Overnight Visitor Targets	25
Value of the Visitor Economy	25
Visitor Economy Trends	27
Whitsunday's Visitor Summary Profile	30
Key Competitors	35
Comparative/Competitive Advantages	36
The Whitsundays Aspirational Visitation Target 2032	37
Tourism Opportunity	38
Situational Analysis	41
Priority Projects	42
05 – Climate Change	43

Risk and Disaster Management	43
Planning for the Carbon Economy	45
06 – Accessibility	50
07 – Strategy and Action Plan	51
Priorities for Success	51
Key Strategy Pillars	53
Action Plan	54
Targets & Performance Indicators	61
08 – Appendices	63
Appendix 1 - Policy Overview	63
Appendix 2 - Core Market Analysis	67
Appendix 3 - SWOT Analysis	73
Appendix 4 - Data Behind the Recommended Product Targets	78
Appendix 6 - Data Behind the Recommended International Targets	80
Appendix 7 - Key Strategic Plans	81
	82

03 – Introduction

Located along Queensland’s central coast, the Whitsundays area is approximately 1,100km north of Brisbane and 600km south of Cairns. Often referred to as the Heart of the Great Barrier Reef, the Whitsundays is ideally located to access inshore fringing reef and hosts 74 islands. The Local Government Area (LGA) covers a land area of 23,876km² (including islands, coastal areas, inland areas, national parks, bushland, beaches, and waterways).

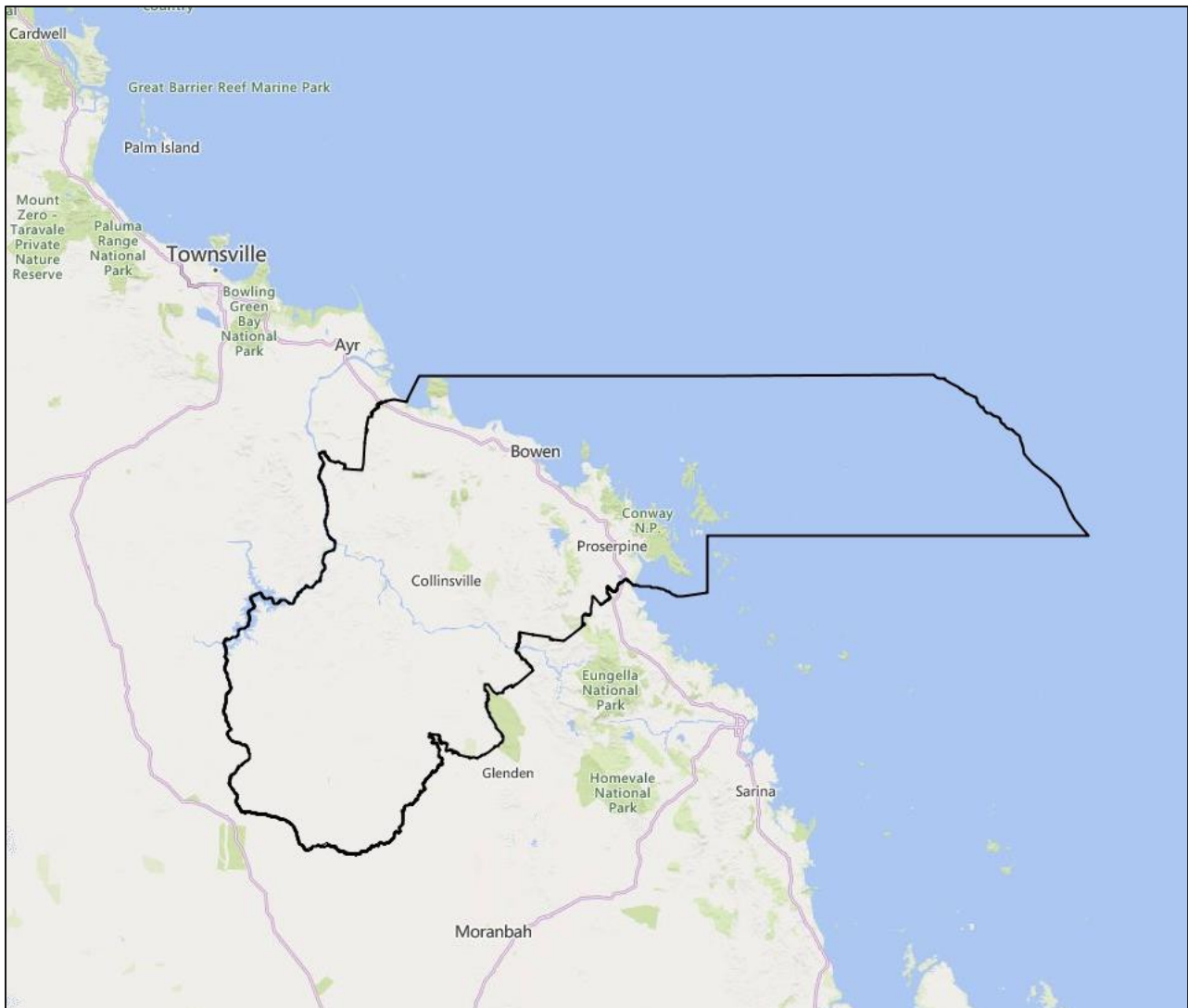


Figure 3: The Whitsunday Regional Council LGA. Source: Whitsunday Regional Council, 2024.

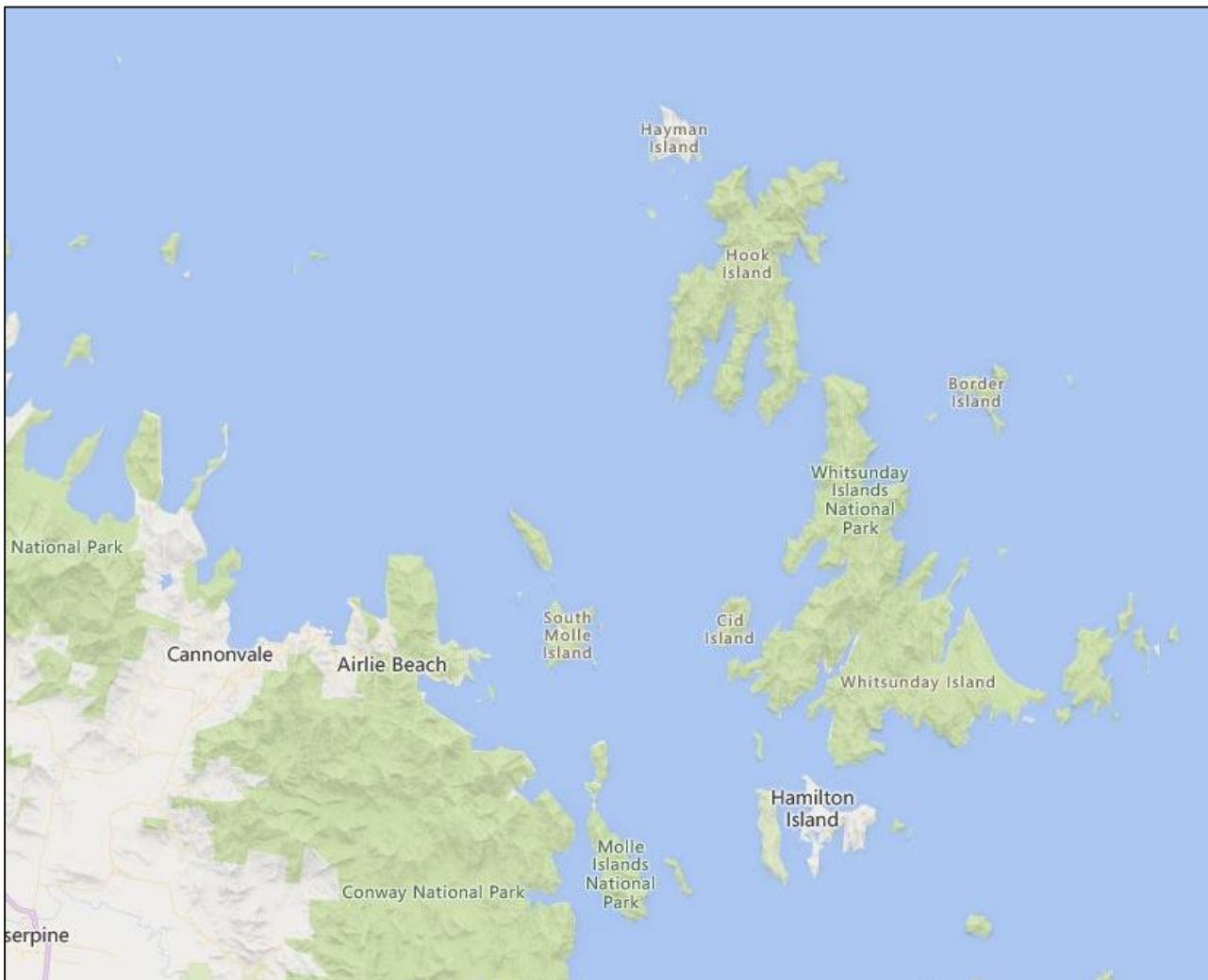


Figure 4: Great Barrier Reef Islands within the Whitsunday Region LGA. Source: Whitsunday Regional Council, 2024.

The Whitsunday local government area (LGA) is a growing residential and tourist area, with substantial rural, rural-residential, conservation and parkland areas, and pockets of commercial and industrial land use. The LGA includes the service centre of Proserpine, mining town of Collinsville, coastal towns of Airlie Beach, Bowen, Cannonvale and Shute Harbour, and resorts on several of the islands. The current major industries are tourism, agriculture, mining, and new sectors including space launch¹¹.

The Council is positioning the region as a lifestyle region full of opportunity and prosperity, the region of choice to live, visit, work and invest. The 2022-2025 Regional Economic Development Strategy notes, *"Future economic development will reflect the rich history of the region and its traditional industry sectors while at the same time embracing new emerging sectors and continuing to build on competitive strengths to leverage future growth opportunities. Attracting investment into catalytic infrastructure projects will be an important route to growing the future regional economy."* Tourism remains a priority industry for the region.

This Destination Management Plan sets the goals and ambitious targets for the sustainable management of tourism in the Whitsundays Region from 2024-2028.

¹¹ Whitsunday Regional Council – Regional Economic Development Strategy 2022-2025

04 – Setting the Scene

The development of this DMP was a collaborative process with input received from Whitsunday Regional Council, visitor economy businesses, government agencies, Traditional Owners, and community members during late 2023. The process included:

- Extensive desktop research of relevant policy documents, regulations, and planning reports.
- One-on-one consultations were conducted with members of the Whitsunday Regional Council, tourism operators, Tourism Whitsundays board members, Traditional Owners, and regional councillors.
- Three workshops conducted in-region to provide the community an opportunity to feedback and input on the DMP.
- A community survey shared through Tourism Whitsundays’ channels.
- A workshop with Tourism Whitsundays to feedback and input on the draft strategy and action plan.

The priorities and action items reflect the needs and expectations of key stakeholders and are aligned to the following strategies.

Alignment to Local, State and Federal Strategy and Plans

The Whitsunday Destination Management Plan aligns to, and supports, a broader policy framework, including the current tourism policy at a federal, state, and local level.

For a full list of policy, reports, and strategies that have influenced the information, outcomes, and recommendations in this DMP, see *Appendix 1*.

Federal	<ul style="list-style-type: none"> • Thrive 2030 – Austrade The federal framework for tourism development focuses on recovery, capacity building, and resilience of the visitor economy. Across three core themes of collaborate, modernise, and diversify, the strategy aims to grow high quality visitor experiences, industry connectivity, collaboration, and workforce development. • National Agritourism Strategy Framework – Australian Regional Tourism LTD – The framework examines the strong, emerging agritourism sector in Australia and details the foundations for growth of this sector, the competitive advantage, sustainability and reconciliation opportunities of the sector, and how this shift will enable farmers to diversify their product offering, mitigate risks, and build resilience within the industry. This National Strategy Framework is designed to unify an
----------------	--

	<p>emerging sector under one voice in two ways: 1) Support a sustainable approach to growth, reflective of the holistic benefits of Agritourism to regional communities, land, culture, and business. 2) Consider how a unified national framework, with an eye to Agritourism’s export potential, can enhance Australia’s international reputation into the future.</p>
<p style="text-align: center;">State</p>	<ul style="list-style-type: none"> • Towards Tourism 2032: Transforming Queensland’s visitor economy to welcome the world – A collective framework to set the direction of tourism in Queensland for the next 10 years. The strategy offers three pillars of development; demand, supply, and connectivity; catalysts for change; and enablers of change. The actions are designed to reach a \$34 billion aspirational spend target by 2027 and \$44 billion by 2032. • Ecotourism plan for Queensland’s Protected Areas 2023-2028 - The Ecotourism Plan provides the framework for planning and delivering immersive ecotourism experiences in Queensland’s spectacular national and marine parks and other protected areas. The plan acknowledges challenges posed by the COVID-19 pandemic to the tourism industry and outlines the government’s commitment to foster innovative ecotourism opportunities and experiences that allow visitors to actively provide a positive contribution back to Queensland’s protected areas and local communities while helping to rebuild a sustainable, resilient ecotourism industry. The Plan begins to re-frame how we think about sustainable ecotourism and focuses on visitors consciously connecting with and contributing to where they visit. There is also a strong focus on working with First Nations partners to build their capacity in offering genuine cultural experiences. • Queensland Climate Adaption Strategy 2017-2030 – The climate adaption strategy maps out Queensland’s pathway towards preparation and mitigation of the risks associated with climate change. The strategy is built around four key objectives; Recognise; Equip; Integrate; and collaborate. To achieve on these objectives, the strategy sets out four strategic pathways: <ol style="list-style-type: none"> 1. People and knowledge: empowering best practice, education, and engagement among communities. 2. State government: ensuring the risks and opportunities associated with climate adaption are reflected in policies, regulations, and procedures. 3. Local governments and regions: working with local governments and regional organisations to ensure that solutions and climate risks are reflected in planning and decision making. 4. Sectors and systems: Assist sector leaders to collaborate across government, organisations, and communities to identify adaptation needs and to prioritise adaptation activities.

	<ul style="list-style-type: none"> • Building a Resilient Tourism Industry: Queensland’s Climate Change Response Plan (2018) – Climate change is a risk and an opportunity too big to ignore. The strategic plan is underpinned by ambitious actions to support Queensland’s tourism industry to proactively respond to climate change and lead the way as a steward for its environment.
<p style="text-align: center;">Local</p>	<ul style="list-style-type: none"> • Whitsunday Regional Council - Regional Economic Development Strategy 2022-2025 - The strategy provides a blueprint for the region’s future to 2030, and includes the pillars of education and job readiness, business investment, community connections and enabling infrastructure to drive the strategic focus of the region. • The Whitsundays Destination Tourism Plan 2019 – 2024 - Led by Tourism Whitsundays, the plan works to the vision of showcasing the Whitsundays as the globally recognised Great Barrier Reef destination. The high-level aim for the plan is to increase overnight visitor expenditure to \$2.14b by 2025 through increased length of stay and average daily spend. To achieve this, products and experiences that exceed the visitor expectations are required.

Overnight Visitor Targets

The State Government’s *Towards Tourism 2032* plan outlines ambitious targets for overnight visitor expenditure, to reach \$34 billion per annum by 2027 and \$44 billion per annum by 2032. To achieve this goal, actions align to the pillars of Demand, Supply and Connectivity; Catalyst for Change; and Enablers of Change according to the three distinct phases to rebuild and revitalise the Queensland visitor economy.

Value of the Visitor Economy

Economic Value

Tourism is a major economic driver across the region, with the Whitsunday Regional Council’s *Regional Economic Development Strategy (2022-2025)* reporting that ‘Accommodation and Food Services’ accounted for \$140 million in Gross Regional Product (GRP) for the region in 2020. The sector was the second highest employing sector with 1,486 jobs reported in ‘Accommodation and Food’ services alone. It’s important to note that the tourism industry encompasses much more than just accommodation and food services, and includes everything from tours to transport, shopping, and even health services.

Data from the Tourism Satellite Account shows that tourism in the Whitsundays accounted for \$584.5 million Gross Regional Product (GRP) and \$71.5 million in taxes in the 2021 financial year (Figure 5). The Tourism Satellite Account looks at the tourism industry’s total contribution across all sectors that are impacted by tourism activity.

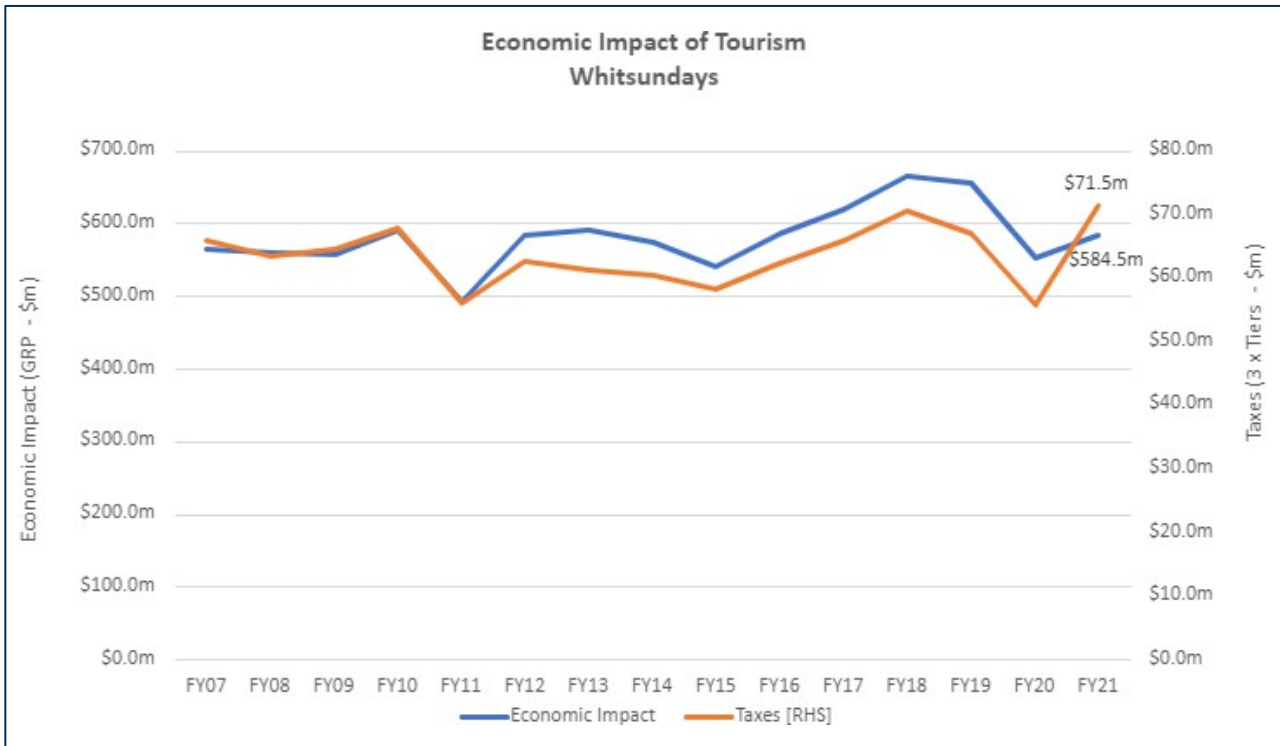


Figure 5: Economic Impact of Tourism Whitsundays. Source: Tourism Satellite Account.

Social Value

The impact of tourism on a community, especially in a popular holiday destination such as the Whitsundays, is an important consideration as it directly influences the social license needed to operate within that community.

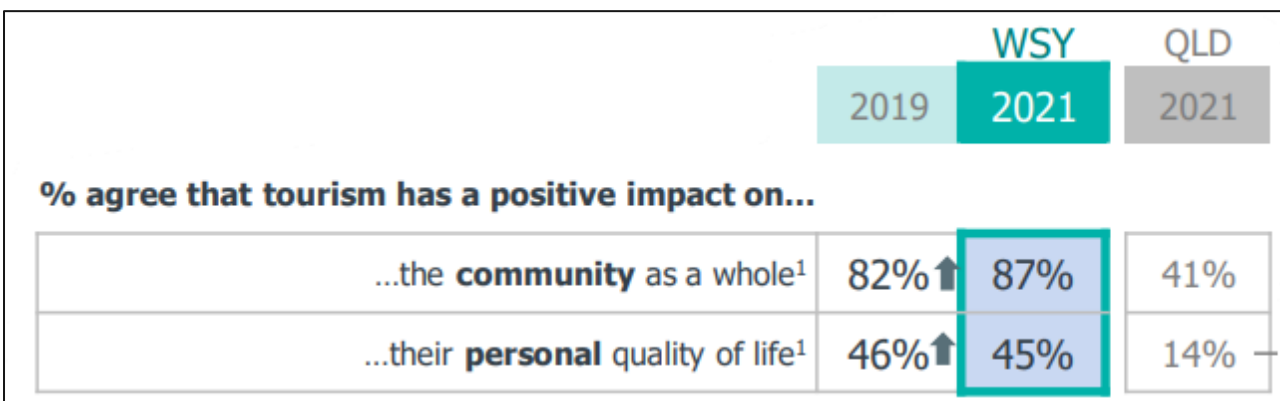


Figure 6: TEQ Social Indicators: Positive impacts of tourism. Source: Tourism & Events Queensland

% agree	WSY		QLD
	2019	2021	2021
Greater cultural diversity	96%	97%	89%
Important economic benefits	92%	97%↑	89%
Festivals and events attract tourists and raise awareness	93%	94%	88%
Increased regional profile	90%	92%	83%
Increased local pride	80%	78%	71%
New infrastructure	71%	68%	67%
Benefits shared evenly	49%	47%	44%

Figure 7: TEQ Social Indicators: Positive impacts of tourism. Source: Tourism & Events Queensland

According to Tourism and Events Queensland’s Social Indicators (2021), when asked if they agreed that tourism has a positive impact on the community as a whole, 87% of respondents advised they agree. **The region sits a significant 46% higher than the Queensland average of 41%** (Figure 6).

The positive impacts that Whitsunday’s residents saw in tourism included, among other things, **greater cultural diversity (97%)**, **important economic benefits (97%)**, and **festivals and events attracting tourism (94%)**. The largest challenge identified when looking at the impacts of tourism is the uneven distribution of the benefits (47%) (Figure 7). Tourism also brings indirect economic contribution with wages, salaries, profits and taxes generated from a broad array of businesses that visitors engage with across the region, including education providers, petrol stations and marine operations.



Figure 8: Economic contributions of the visitor economy.

Visitor Economy Trends

Traveller’s perceptions, concerns and values have continuously changed over the past five years, with the industry seeing an increasing interest in sustainability and a heightened interest in wellbeing,

health, and the natural environment. Whilst impossible to forecast accurately, this list identifies emerging and current visitor trends that will shape travel over the next five years.

Conscious consumers – Increasing consumer awareness around sustainability has led to growing environmental and social concerns globally. This has influenced people’s interest in adopting more sustainable habits and maintaining these when travelling. Booking platforms are making it easier for travellers to book sustainable trips through transparency, validated badges, and filters.

Travelling for wellness – Travellers are seeking more than typical wellness experiences such as spas, retreats, and thermal springs; they are now also seeking to continue their own wellness lifestyle during travel. This lifestyle could include healthy eating, fitness routines, mind-body practices, nature experiences and connections with the local people and culture.

Emotional experiences – Travellers are seeking a richness of experiences, to expand knowledge, feel connection and engage with culture and heritage. Consumers are searching for emotional opportunities, making areas like social sustainability engagement just as important as environmental. Customers are less likely to be forgiving if expectations are not met.

Keeping it local – Travellers are seeking local food and beverage at regional destinations where community is at the centre of the experience. Localised supply-chains and showcasing regional flavours will continue to be important as we emerge from this era.

Camping and caravanning – The increasing diversity of camping, glamping and caravanning has opened a range of markets – from sleeping in an unpowered camp site, to romantic glamping tents, to million-dollar mobile homes. The popularity of these options has grown significantly with the desire for holidays in remote location, to detox from digital, and have the road trip of a lifetime.

Blended travel – People are placing a higher value on their time and flexibility, while holding differing expectations to work-life balance, technology, and job security compared to previous generations. This has resulted in a surge of blended travel. Growing from “bleisure”, the blended traveller spectrum is wide, including remote workers, digital nomads, corporate retreaters and working family holidaymakers.

Accessibility - In 2021, travel groups featuring individuals with disabilities or long-term health conditions contributed \$13.5 billion to domestic day and overnight spending, as per Tourism Research Australia. Recognising the significance of accessibility in tourism, the Queensland State Government designated 2023 as the 'Year of Accessible Tourism.' This initiative includes funding and projects aimed at enhancing the overall visitor experience for those with disabilities. With the growing emphasis on inclusivity in the visitor economy and an aging population, ensuring accessible experiences and options is a necessity.

Digital is the way – Keeping up to date in itinerary changes, accessing booking information, travel guides and making payments, consumers are never far from their digital device. Accessible, online services are now a must to meet consumer demand. According to Booking.com’s predictions for 2024, AI will become a key digital tool for travellers, with 48% of travellers trusting AI to plan their

trips¹². The ability to connect becomes a core consideration for destination management organisation and operators to meet these growing expectations.

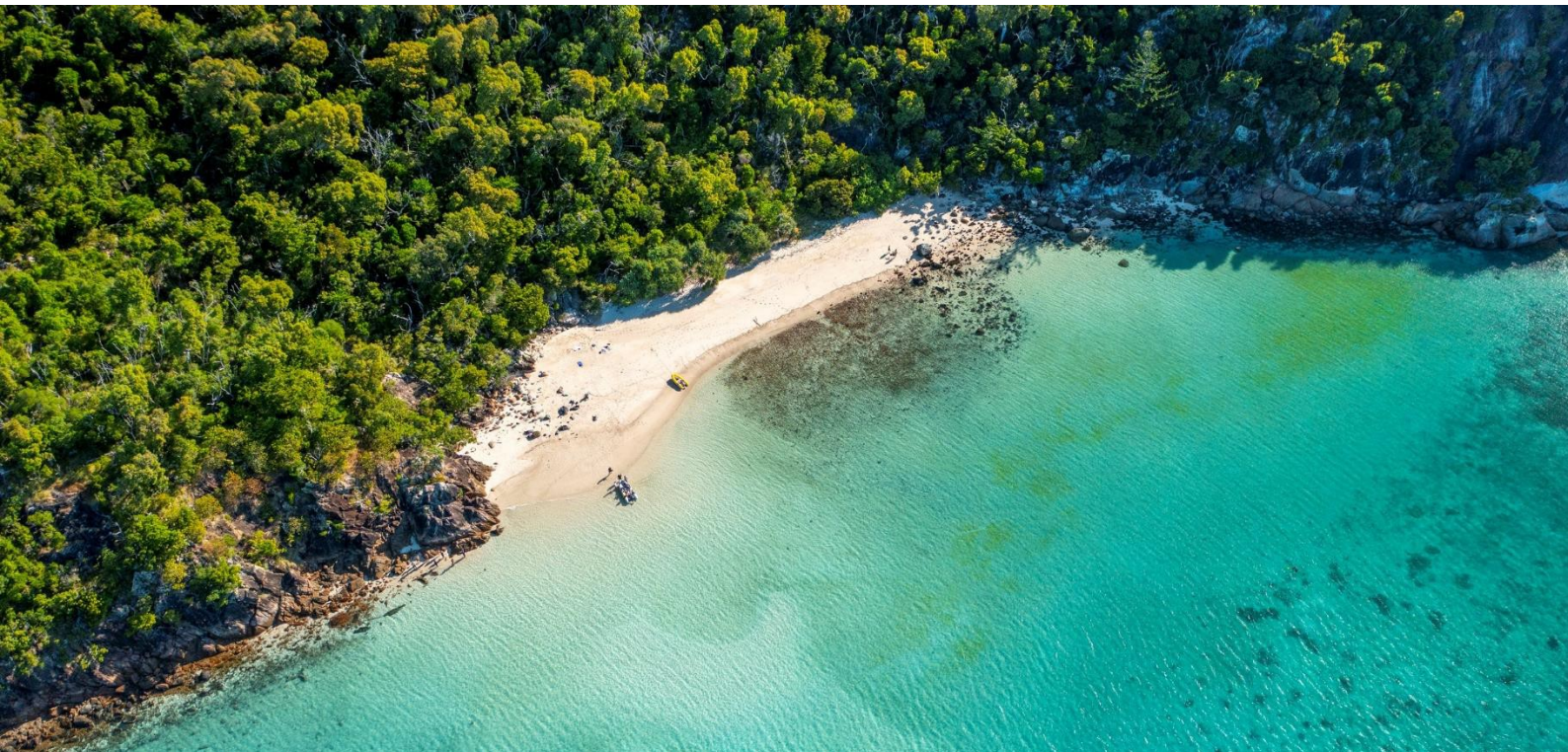
Nature-based – Getting back into the outdoors with hiking, biking, rafting, and climbing are increasing in popularity. Memorable experiences that facilitate personal growth or rejuvenation are now sought by consumers.

Sustainability on a pathway to decarbonise – Year-on-year growth is being seen in demand for sustainable tourism opportunities. Booking.com’s consumer insights show more than 80% of people are actively seeking sustainable accommodation¹³. With global commitments to net zero, monitoring and reporting emissions, accelerating decarbonisation, and engaging in carbon removal skills are becoming business as usual.

Travelling with pets – Trends are showing a significant increase in the number of travellers wanting to bring their furry friends with them. Pet-friendly accommodation and pet sitting services will make the decision to travel easier.

Observations

There is now a stronger focus on health and wellbeing, an interest in safe, nature-based locations and a desire for transformational experiences that connect visitors to both the community and place. Visitors are not only wanting unique and accessible ways to experience the places they visit, but they are seeking bragging rights and stories that they can share with their friends and family. These expectations provide an opportunity for the region given the strength of its nature based and wellness products and experiences.



¹² Booking.com – Travel Predictions 2024 - <https://www.booking.com/c/trends/travelpredictions2024.html>

¹³ Booking.com – Sustainable Travel Report 2021 - <https://www.sustainability.booking.com/post/booking-com-s-2021-sustainable-travel-report-affirms-potential-watershed-moment>

Whitsunday's Visitor Summary Profile

Domestic Visitor – Snapshot

The typical domestic visitor can be identified by a range of key demographics¹⁴:

- **Visiting for a holiday.** Of domestic overnight visitors to the region in FY 2023, 66% came to the Whitsundays for leisure.
- **Older SINKS/DINKS**¹⁵ made up 30% of visitor markets, and **Empty Nesters** accounted for 26%.
- Largest **intrastate annual household income** cohort is under \$100,000 (30%).
- Largest **interstate annual household income** cohort is over \$200,000 (50%).
- At 50.7%, 'short breaks' (4-7 nights) is the **largest product category** for domestic visitors, followed by 'weekends' (1-3 nights) at 35.5%.
- Of domestic holiday visitors to the region, **intrastate travel** accounted for 55%, and **interstate travel** accounted for 45%.
- **Arrival by aircraft (52%)** was the predominant mode of transport, followed by **self-drive (40.6%)**.
- **Enjoying beaches, relaxation, and nature-based activities** are the most popular activities¹⁶.
- Domestic overnight visitors **spend \$1723.92 per person**.



¹⁴ National Visitor Statistics, TRA, 2023

¹⁵ SINKS (single Income No Kids) & DINKS (dual Income No Kids)

¹⁶ Tourism & Events Queensland, KANTAR, 2023

Core Market Analysis

Dramatic changes to a destination’s market don’t tend to occur year-on-year, however, an event as significant as the COVID-19 pandemic has the potential to have substantial core market impacts.

The Whitsundays saw exceptional growth over the period of 2021-2023 as the impacts of closed state and national borders, a captive domestic market, and a desire for escapism drove increased bookings from markets that were previously not considered “core markets”.

Figure 9 provides a snapshot of the domestic market segments over the 2019 – 2023 period.

As we emerge from the global pandemic, and domestic and international travel continues to grow, it’s important that the region’s core markets are reviewed, and any shifts and changes (temporary or permanent) are understood.

For a full market analysis refer to Appendix 2.

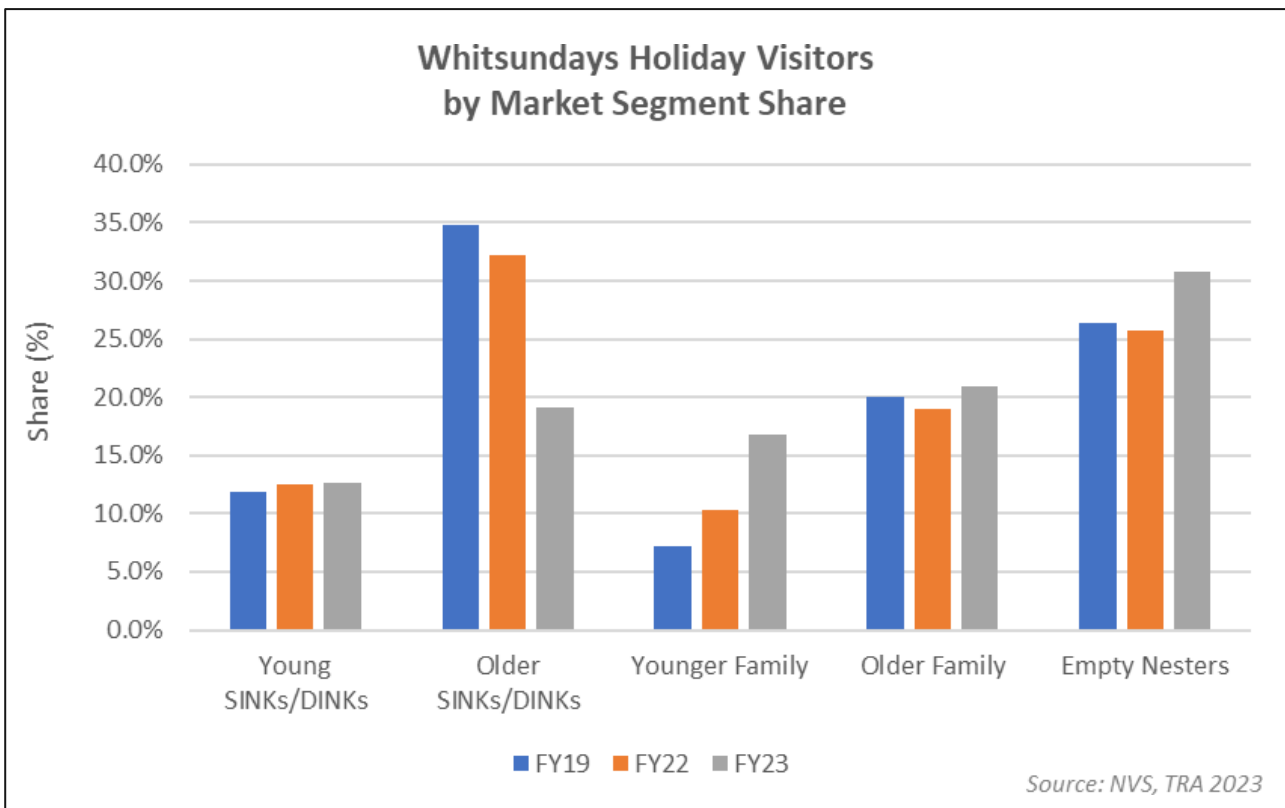


Figure 9: Whitsunday holiday visitor by market share. Source: NVS, TRA, 2023

Domestic Market - Segments

As of June 2023:

- **760,000** domestic overnight visitors
- **347,000** domestic day trip visitors
- **4,180,000** domestic visitor nights
- Share of total visiting for holiday (**80%**), visiting friends or relatives (**11%**), business (**8%**)
- Domestic visitor expenditure peaked at **\$1,400 million**.

The Whitsundays domestic overnight visitor market reached 760,000 visitors in the financial year (FY) ending 2023, up from 643,000 in FY 2019, with strong year-on-year recovery from the initial impacts of COVID-19 in 2020.

Total market share on Queensland overnight domestic visitors increased to 3% in 2023 which is reflected in domestic visitor nights, with 2023 reaching 4,180,000 domestic visitor nights.

Holiday Visitors Segments by Share	Whitsundays		Queensland	
	Pre-pandemic (Avg 2017-2019)	Post-pandemic (Avg 2021-2022)	Pre-pandemic (Avg 2017-2019)	Post-pandemic (Avg 2021-2022)
Young SINKs/DINKs	9.2%	11.3%	3.1%	6.0%
Older SINKs/DINKs	29.9%	28%	4.7%	5.5%
Younger Family	11.5%	12.6%	3.6%	6.6%
Older Family	23.3%	21.3%	4.0%	4.8%
Empty Nesters	25.9%	27%	3.5%	5.2%

Figure 10: Holiday visitor segments by share pre and post pandemic. Source: NVS, TRA, 2023.

Older SINKS/DINKS

Older SINKS and DINKS are the dominant market for the Whitsundays region with 28% of the Whitsundays share going to this market. While still the highest market segment, this market saw a 1.9% decline of Whitsundays share from the pre- to post- pandemic period. At a state level, however, the Whitsundays share of the Queensland SINKS/DINKS market saw a 1.2% increase to 5.5%, for the 2021-2022 post-pandemic period (Figure 10). This is an important focus market for the Whitsundays as older SINKS and DINKS are more mobile, not limited by school holiday periods (other than to not travel), and they spend more across more sectors.

Since the end of the pandemic and borders re-opening, older SINKS and DINKS have been a key component of the recovery through strong visitor growth and even stronger spend growth. It's not so much "high value traveller" as "high value travel" – and older SINKS and DINKS are trying new experiences, spending on little luxuries, and generally indulging themselves. This high yielding market is attractive to the Whitsundays; however, visitor expectations need to be met through the experiences and accommodation on offer. Further market review is required to understand the

decline in Whitsunday's market share and to ensure needs and expectations of this market are being met.

Empty Nesters

Empty Nesters continue to be an important market for the Whitsundays making up 27% of the market share in the post-pandemic period. This market share has seen a growth of 1.1% up from 25.9% in the 2017-2019 period (*Figure 10*). The Whitsundays share of the state Empty Nester market has also seen significant growth rising from 3.5% in the 2017-2019 period, to 5.2% of Queensland share in the 2021-2022 period (*Figure 10*). Like Older SINKS/DINKS, this market is more mobile and not tied to school holiday periods for travel.

The Empty Nesters market also encompass the Grey Nomad segment which can be a highly visual segment due in part to the obvious movement of caravans, camper trailers etc in smaller communities. Grey Nomads tend to encourage dispersion across the region and don't always stick to the popular, busy spots like Airlie Beach. Tending to be the main markets in both Bowen and Collinsville, they are an important market to reach to ensure that tourism benefits are spread throughout the region.

Young SINKS/DINKS

The Young SINKS/DINKS market, while not traditionally a key market for the Whitsundays region, did see the highest growth in regional share (+2.1%) between the 2017-2019 and the 2021-2022 periods (*Figure 10*). This market also saw significant growth in the Whitsundays share of the QLD Young SINK/DINK market with a growth of 2.9%. While not as financially established as older SINK/DINKS, the younger market does demonstrate the same flexibility regarding their freedom to travel outside of school holidays.

While the national and state tourism industry continues to grow back post COVID-19, it's important to note that all markets are under review while the travel industry stabilises. Some traditional markets can be expected to gradually return to 2019 levels while others will change to reflect new economic and social conditions.

International Market

The international visitor market has begun recovery after the lifting of border restrictions in early 2022, however there is a steep road ahead before visitation reaches pre-COVID-19 levels.

Due to extremely low visitor numbers in the period of 2020-2022, there was limited data available during the pandemic and normal rolling annual data will be fully restored by March 2024. In the year financial year ending 2019, there were 117,000 international visitors to the region, staying 849,000 nights.

It is expected by 2025 the international market to Australia will reach pre-COVID-19 levels¹⁷, however source markets are showing uneven recovery with some countries returning quicker than others. The Whitsundays' international visitors are predominantly from western markets, with the UK and Europe

¹⁷ Tourism Research Australia Tourism Forecasts for Australia 2022 - <https://www.tra.gov.au/en/economic-analysis/tourism-forecasts/tourism-forecasts-for-australia-2022-2027>

making up 62% of all international visitors across the region in the period from 2017- 2019. These markets are forecast to reach 2019 levels by 2025 (Figure 11), however geopolitical and economic uncertainty across UK and Europe may negatively impact rate of return.

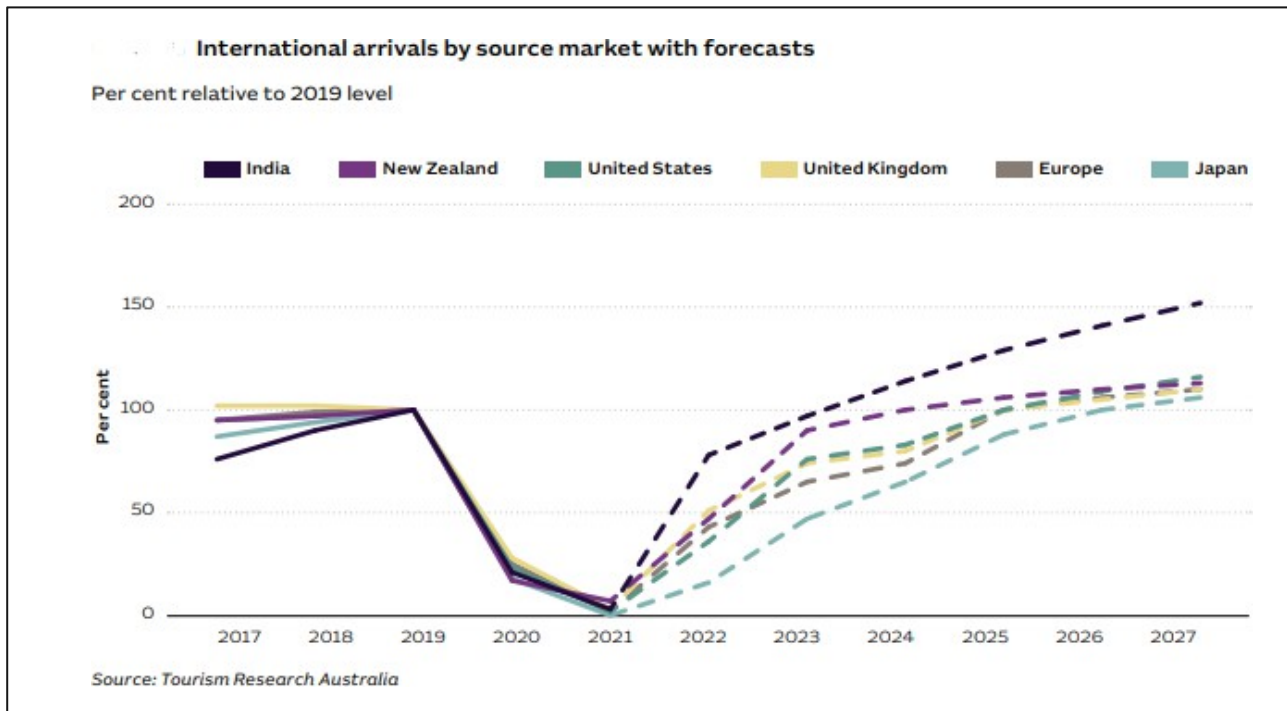


Figure 11: International arrival forecast by source market. Source: Tourism Research Australia.

Tourism & Events Queensland (TEQ) is working in partnership with Tourism Australia (TA) in marketing, re-positioning, and attracting visitors to the state, driving international recovery¹⁸. This is facilitated by relationships on and offshore. TEQ is tailoring messaging towards various source markets based on trends and consumer sentiment. Continued marketing campaigns including ‘Working Holiday Maker’ and ‘A Beautiful Way to Be’ are aimed towards stimulating key source markets. Further accelerated marketing investment towards the domestic market, New Zealand, Japan, USA and UK will start to shift visitation to the Whitsundays (Figure 12).

TEQ has progressed global awareness opportunities surrounding the 2032 Olympic and Paralympic Games. Consideration should be given to how the Whitsundays aims to position itself to international markets in both a post-COVID world, and in the lead up to the 2032 Olympic Games.

¹⁸ International Marketing Opportunities | Tourism and Events Queensland - <https://teq.queensland.com/au/en/industry/what-we-do/marketing/current-opportunities/international-marketing-opportunities>

CLASSIFICATION	 Accelerate	 Target	 Take Flight
DEFINITION	High value markets with high growth potential that provides opportunity to accelerate Queensland’s leisure market share due to increased investment from AAIF, TA and partners.	Moderate value markets forecast to support Queensland’s leisure market recovery by pursuing targeted, segment-based opportunities.	Lower value markets with opportunity to drive incremental growth off current and projected aviation boost via AAIF.
APPROACH	ACCELERATED INVESTMENT Build consideration and convert intention through Brand Queensland and leveraged AAIF, TA, RTO, and partnership investment.	TARGETED INVESTMENT Leverage Tourism Australia’s investment and pursue targeted, segment-led partnership opportunities that convert intention for Queensland.	BOOST INVESTMENT Leverage AAIF investment to pursue targeted opportunities to convert intention for Queensland through partnerships.
MARKETS	Australia China Japan New Zealand United Kingdom United States	Canada Germany India Singapore South Korea	France Hong Kong Indonesia Italy Malaysia Taiwan Vietnam Other*

Figure 12: Tourism & Events Queensland key actions in international markets. Source: Tourism & Events Queensland

Key Competitors

The below key domestic and international competitors have been identified for the Whitsundays region.

Cairns

The high-end elements of Cairns, and in particular Port Douglas, offer an increasingly competitive product. The two World Heritage areas of the Great Barrier Reef and the Daintree Rainforest, combined with a specific and targeted environmental strategy, are creating a strong competitive platform.

Tourism Tropical North Queensland recently launched Australia’s first direct-to-consumer website focused exclusively on sustainable tourism products and options. Port Douglas and Palm Cove have become strong destination brands to the high-end domestic market and increasingly to the international western markets, and the more upscale end of eastern markets.

Southern Great Barrier Reef

Whilst the inclusion of the words “Great Barrier Reef” within the destination title has provided initial brand impetus, the limited product is restricting any significant growth or medium scale competitive threat. This will take time to evolve, however, its proximity to the Whitsundays and the “newness” factor of additional product suggests the potential for a strong future competitor.

Asia/Pacific Region

The Asia/Pacific region has been the slowest to return to pre-pandemic numbers with limited long-haul travel from the northern hemisphere due to airline pricing, aircraft availability, consumer hesitancy, and volatile geo-politics.

The comparison between the recovery for Bali and Hawaii highlights current market uncertainties (Figure 13). The outcome is that the outbound domestic market in particular is expected to react strongly to any reduction in airfares within the Asia/Pacific region, which will increase the competitive pressures on the Whitsundays substantially.

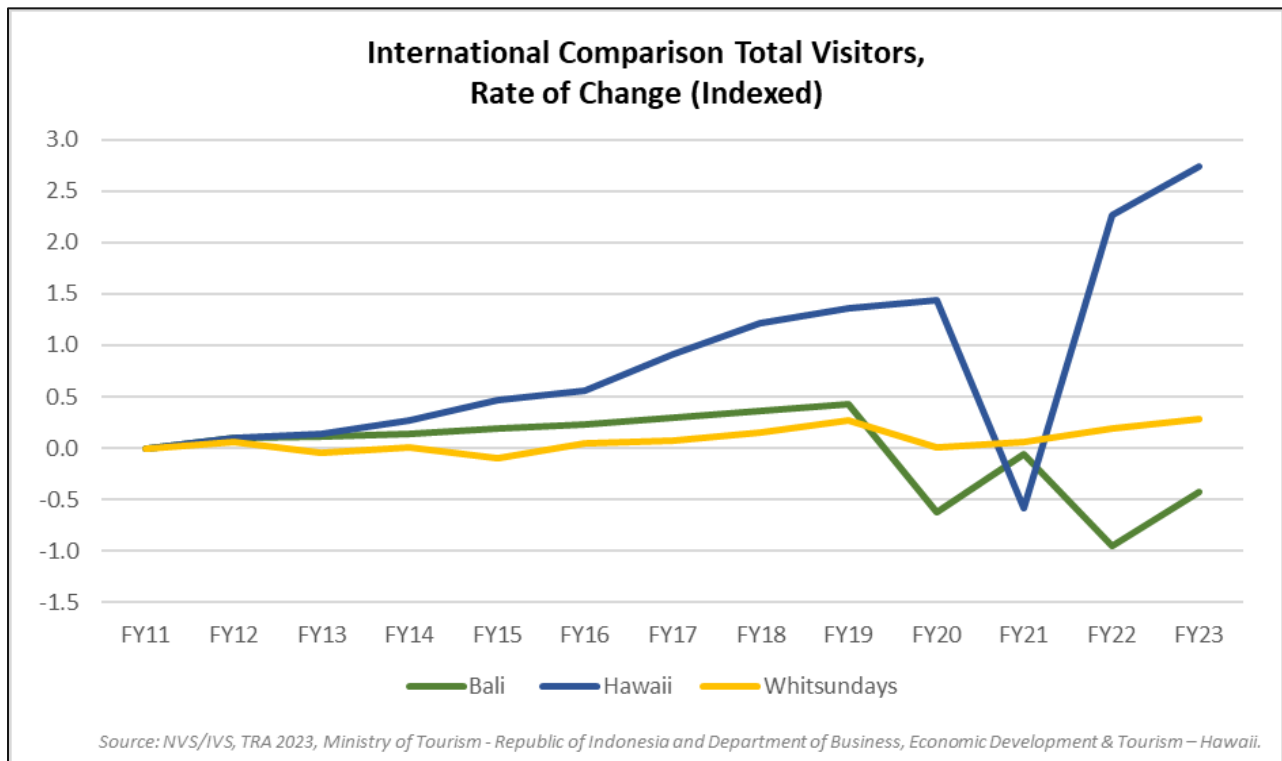


Figure 13: International Comparison between key competitors.

Comparative/Competitive Advantages

Comparative Advantages

The Whitsundays benefits enormously from a range of comparative advantages. Comparative advantages are usually the result of location and/or geographic benefits, however, these benefits can be susceptible to sudden challenges due to natural disasters, climate change impacts (real or perceived), and reputational brand damage. For the Whitsundays, these comparative advantages include:

- proximity to the Great Barrier Reef;
- 74 subtropical islands each contributing in different ways to the Whitsunday experience and brand;
- pristine natural environment;
- globally recognised iconic locations such as Heart Reef and Whitehaven Beach; and
- reasonably safer waters for recreational and competitive sailing boats/fleets.

Competitive Advantage

Competitive advantages are created/driven by business as part of a specific strategy. For the Whitsundays the targeted competitive advantages include:

- strategic and industry-leading decarbonisation and sustainability work being undertaken through the Healthy Heart project;
- ease of access due to extensive transport infrastructure such as the two regional airports, ports, ferry terminals etc;
- use of this infrastructure by professional, well run tourism businesses such as airlines, ferry companies, cruise boats and tour companies; and
- well run and experientially oriented tourism businesses across multiple sectors such as food and beverage, accommodation, and retail etc.

The Whitsundays Aspirational Visitation Target 2032

Through this DMP the Whitsundays will play an active role in its support of the actions and targets outlined in the State tourism plan (*Figure 14*) – *Towards 2032: Reshaping Queensland's visitor economy to welcome the world*. The Whitsundays region contribution is dependent on several variables:

- Destination visitation figures continue their strong growth track exceeding 2019 figures year-on-year to 2028.
- The substantial increase in Queensland intrastate travel experienced during the pandemic is managed to maintain growth numbers.
- The substantial increase in interstate visitation from New South Wales and Victoria seen during the pandemic is managed to maintain growth numbers.
- The Whitsundays retains access to its current level of annual State and Local Government funding.
- The Whitsundays receives additional state and local government funding to expand marketing activities, attract investment and development opportunities, focus on experience development, and undertake advocacy activities.
- The region builds back and continues to grow its pre-2019 share of pre-pandemic visitation from Asia (specifically including China), Europe (in particular, German, and Scandinavian markets), the United Kingdom, and North America.
- Visitation growth factors are even across the State.

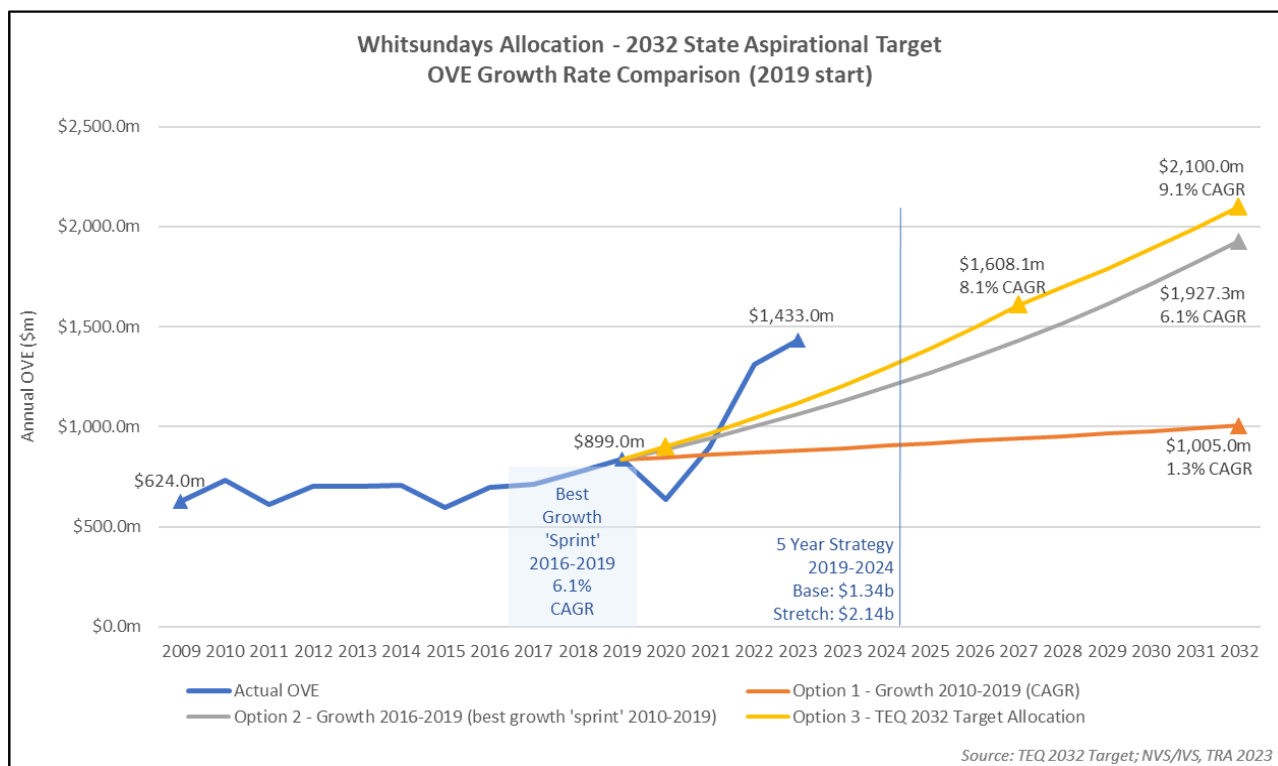


Figure 14: Whitsundays Allocation of State Aspirational Target. Source: NVS, TRA, 2023

Tourism Opportunity

The international and domestic marketplace has become extremely competitive for all travel markets post COVID-19.

The pandemic helped to highlight that the Whitsundays region provides an attractive and accessible holiday and leisure travel option for intrastate, and East Coast interstate markets (Figure 15).

With unprecedented growth during the pandemic, unmatched by most other destinations in Australia, the Whitsundays region is in a unique position to build from a place of strength.

Staying true to the core elements of the brand, and playing to the strengths of the region, would position the Whitsundays to deliver first-class experiences, exceed customer expectations, and truly represent the region’s diversity of landscapes, offerings, and characters.

1. Adventure

Recent market research commissioned by TEQ confirms that the Whitsundays region has a strong nature and adventure-based brand with a high awareness in domestic markets. The region possesses an opportunity to further strengthen their adventure and nature-based identity by revitalising the existing products and experiences the region is known for (e.g. snorkelling and diving on the Great Barrier Reef), while also developing new experiences to meet the needs of different adventure market segments (e.g. mountain biking and multi-day hiking).

Seasonality has been a challenge in the past particularly with respect to weather and major weather events. While such weather challenges and events fall outside of the control of industry operators, it

is important that visitor’s expectations are managed through effective and accessible communication and education.

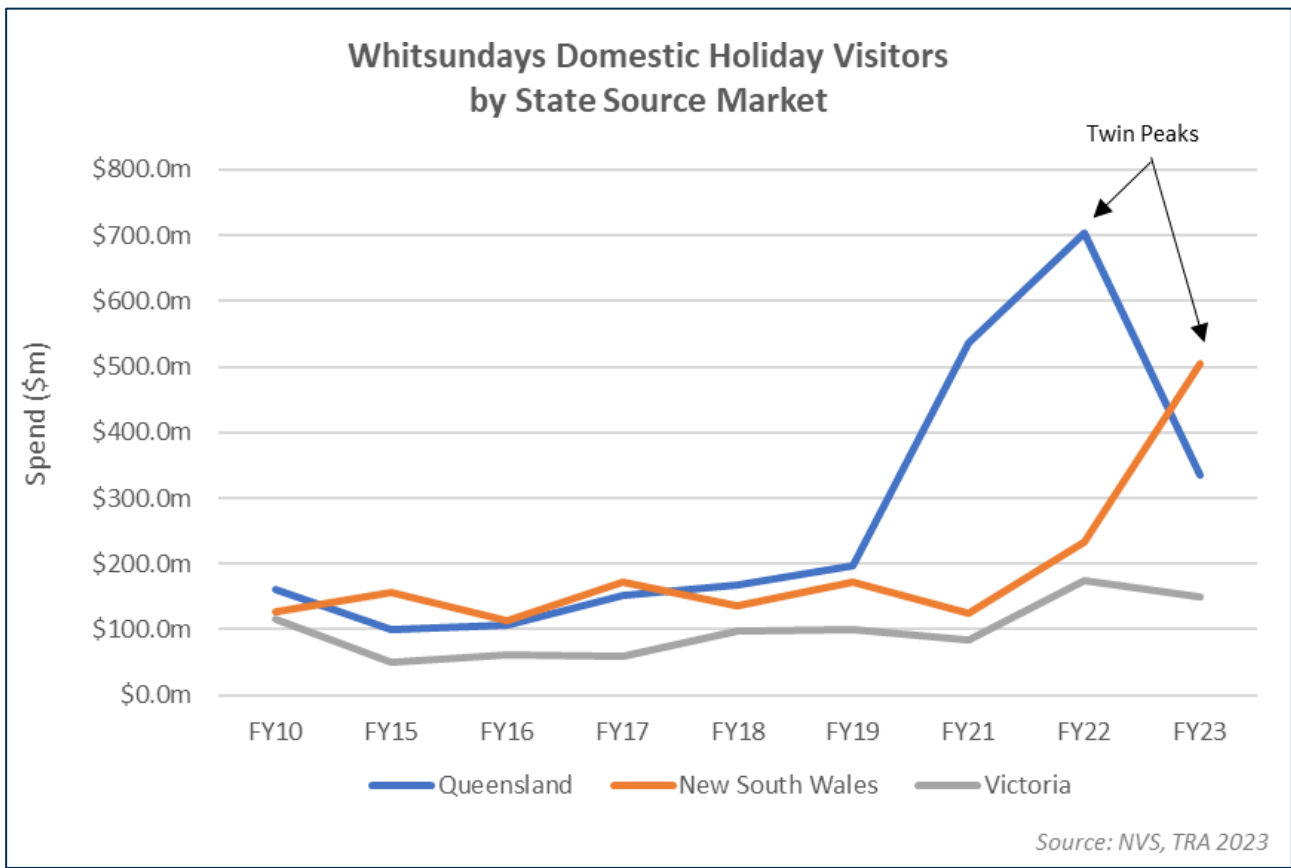


Figure 15: Whitsunday’s domestic holiday visitors by source state. Source: NVS, TRA, 2023

2. Accommodation

To alleviate the challenge of accommodation shortages faced by the region, and to promote growth in line with the State’s 2032 target, a clear pipeline to investment has been determined as a key project for this DMP.

An investment prospectus that includes a thorough supply and demand analysis, potential site mapping, and useful information to support potential development would work to reduce barriers to investment, and work to invite investment and development that supports the goals and attractiveness of the region. New accommodation offerings that meet the needs of the market will help to ensure that the region continues to provide on the ground value to visitors.

3. Product Development

In addition to new accommodation, it is essential for growth of tourism in the Whitsundays that industry wide training is available to set and maintain a standard for customer service. The region saw incredible growth during and after the pandemic, and to maintain yield, the service experience on the ground will need to match, and ideally exceed, visitor expectations.

4. Key tourism Precincts

As a well-established holiday destination for both domestic and international visitors, the region has an opportunity to further develop its key tourism precincts. Scaling up will require dedicated place

management plans which will enhance the overall visitor experience in key precincts to include pedestrian friendly pathways and parks, facilities for special events, and a wider range of visitor services to service families, tour groups, and cruise passengers.

Development of key precinct areas will provide opportunities for visitors to further engage with nature, the local community, and businesses, and will set the region apart as a safe, unique, and world-class destination.

5. Agritourism

A significant growth opportunity for the region is the development of agritourism. According to the *National Agritourism Strategy Framework (Agritourism 2030)*, the year ending December 2019 saw agritourism valued at \$17.4 billion, with \$7.4 billion of that attributed to farm and farm gate visitation. With predicted growth in this market, the strategy identified the opportunity to grow farm and farm gate visitation to \$18.6 billion by 2030.

A good example of successful agritourism is the collaboration between Visit Sunshine Coast (VSC) and the Food & Agribusiness Network (FAN) which saw the development of the *Queensland's Sunshine Pantry* campaign. The Whitsundays region is presented with an incredible opportunity for cross-region collaboration in the development of agritourism, food tourism, and farm-to-table experiences. With a dominant agricultural industry that sees the production of fruits and vegetables including mangoes, tomatoes, and capsicum, as well as beef, prawns, and an emerging agave product, the region is in a prime position to develop a leading agritourism and food tourism product.

6. Drive Market

The drive market continues to be important to the region both as an access means for current intrastate arrivals, and for dispersion within the region. The Whitsundays region boasts extensive and varied landscapes and ecosystems that are best experienced by road. With access to everything from tropical islands within the Great Barrier Reef, to the sandy beaches of Bowen, and the rugged outback town steeped in a rich history that is Collinsville, the drive market are best positioned to experience the full range of what the Whitsundays has to offer. It's important to not only maintain, but to continue to grow the drive market. Investment in improved wayfinding, road upgrades, and service infrastructure for caravans and recreational vehicles (RVs), along with consistent digital marketing will support the growth of this market.

7. Ecotourism

As a region that encompasses such diverse and wide-ranging landscapes that includes ancient reefs, rainforests, and bushland, the Whitsundays is well positioned to become a leader in ecotourism. It is essential that, in collaboration with resource management agencies, the Whitsundays take a collaborative approach and develop a visitor experience focus to tourism aligned with the Queensland Government's *Ecotourism plan for Queensland's Protected Areas (2023-2028)*. A strategic approach to ecotourism is vital for the Whitsundays to achieve its 2032 targets, and develop a pathway towards sustainable, responsible, and regenerative tourism.

The DMP recognises the significant role played by resource management, conservation, and parks agencies in managing tourism visitation to the region's parks and reserves. This is particularly

important in the Great Barrier Reef Marine Park, Whitsunday Islands National Park, and Conway National Park in Airlie Beach.

Important note regarding tourism opportunities

The development of this DMP is done so with the recognition that additional private and public investment and funding is needed to both refresh existing product and to build new products and service infrastructure. Investment and development are essential to maintain the visitation and yield levels experienced during the pandemic, and to support growth in the region aligned to the state government’s 2032 Aspirational Target.

Situational Analysis

The following key challenges and opportunities were identified by stakeholders through the consultation process.

A full situational analysis and breakdown is included in Appendix 3.

Key Challenges	Key Opportunities
Adequate funding for destination marketing and management activities	Pipeline for investment through the development of an investment prospectus
Price of products and services in the region	Development of new mainland nature and ecotourism experiences
Gap in year-round land-based activities	Indigenous tourism partnerships and products
Barriers to investment and development approvals for major tourism projects	New regional major events and festivals strategy in place
Staffing and accommodation availability and affordability	Aviation access and drive market strategy
Focus and prioritisation on key markets	The Whitsunday Skyway project
Clarity surrounding roles and responsibilities of all key stakeholders in the region	Great walks and mountain bike trails-adventure and ecotourism
Risk and resilience (Climate change, extreme weather, coral bleaching, media coverage)	Themed tourism road loops and signage
Managing the return of cruise ships	Agritourism products
Sustainable tourism including decarbonisation and net zero targets	Additional funding for destination marketing and management activities
Accommodation investment needed (5-star hotel)	2032 Summer Olympics in Brisbane (pre/post-holiday destination)
New regional experiences and attractions	Dedicated convention facility on the mainland
Tourism priority roads network/signage	Service training for staff
Impacts of short-term rentals (Airbnb, Stayz..)	Sustainability accreditation

Priority Projects

Consultations with industry stakeholders identified 15 priority projects.

- 1. The Whitsundays Skyway project.**
- 2. Investment prospectus in place** (local and state government support for inviting investment, aligned to the state aspirational target supply/demand analysis¹⁹ which identified the need for 1,500+ rooms by 2032).
- 3. Integrated transport and region-wide major festival and events strategy.**
- 4. 5-Star resort and convention facility on the mainland.**
- 5. Whitsunday Coast Regional Airport** – Support WRC to sustainably grow domestic aviation routes.
6. Bowen Masterplan (including marina development, foreshore upgrades, Flagstaff Hill)²⁰.
7. Airlie Beach upgrades - improvements to main street facilities to reflect a world class destination.
8. Reef education and training facility.
9. Super yacht infrastructure and facility development²¹.
10. Ecotourism strategy (mountain biking, hiking including the Ngaro Track, camping).
11. Shute Harbour Marine Terminal – stage 2 development²².
12. Customer Service Heroes training²³.
13. Paddock-to-plate and agritourism in Bowen.
14. Coal Face Experience lift facilities in Collinsville.
15. Lake Proserpine stage 2 development²⁴.

Note that some of the abovementioned projects are catalytic to the region and the tourism industry. It is acknowledged that not all are within the direct control or mandate of Tourism Whitsundays. Partnerships will be required with government agencies and the private sector.

¹⁹ Regional market assessment & forecasting for input into DMP development – Whitsundays – bda, 2024

²⁰ Whitsundays Regional Council – Bowen Masterplan 2021

²¹ Queensland Superyacht Strategy 2018-2028

²² Shute Harbour Marine Terminal Annual Performance Plan 2022-2023

²³ Customer Service Heroes Program created by 8 Seconds.

²⁴ Lake Proserpine Master Development Plan (March 2021)

05 – Climate Change

Risk and Disaster Management

With changes in global temperatures causing a shift in weather patterns, destinations around the world are becoming increasingly susceptible to major weather events. Such events bring with them risks to the health and safety of visitors and the local community, risks of property damage, extensive damage to business operations and livelihoods, and reputational challenges.

When considering risk and disaster management, it's important to understand that the scope of considerations goes beyond those events caused by weather patterns. Risks that threaten businesses, communities, and destinations come in many forms that range in scale, both in the likelihood of occurrence, and the severity of the impacts if it does occur.

Due to its climate, location, and accessibility the Whitsundays is inherently susceptible to various significant risks, such as fires, floods, cyclones, and extreme weather events. Serving as a gateway to the Great Barrier Reef, it is exposed to the potential dangers of coral bleaching events, as well as the risks associated with accidents and safety concerns during activities with operators. These factors have the potential to negatively impact the region's health and reputation.

For this reason, it is important that a comprehensive risk assessment is undertaken to identify the types, likelihood, severity, and impacts of major risk events on the Whitsundays tourism industry. The WRC has published a comprehensive Local Disaster Management Plan (2022-2023) which should be used as a key source of information to ensure alignment among the council and tourism industry. A thorough risk assessment enables the industry to establish plans to mitigate the impacts felt by the community and the industry.

The changing climate, geopolitical landscape, cyber security issues, and consumer expectations create risks too large to ignore, but can also present opportunities to increase efficiencies and provide new income streams. Shifts in the regulatory environment around climate response, increasing insurance premiums, increasing cost of energy, and the potential for mandatory carbon reporting and disclosure will affect the tourism industry's focus over the coming years.

The World Economic Forum²⁵ highlights that climate risks are increasing in severity and likelihood. The top risks for communities over the next ten years include:

1. Failure to mitigate climate change.
2. Failure of climate adaptation.
3. Natural disasters and extreme weather events.

²⁵ World Economic Forum. Global Risks Report. 2024. <https://www.weforum.org/publications/global-risks-report-2024/>

In the Whitsundays region, the following risks are identified as most likely to impact community²⁶:

Natural Hazards	Likelihood	Potential community impact (Vulnerability)
Bushfire	Likely	Power, rail, population centres near bushland, areas of significance – Moderate. Communications, transport, urban population centres – Low.
Heatwave	Almost Certain	Vulnerable People and Areas of Environmental Significance – Extreme. Local Ecosystems, Fishing, Forestry, Vulnerable People in remote areas – High. Emergency Services, Public Health and Infrastructure – Moderate.
Severe Tropical Cyclone (Category 3-5)	Likely	Agriculture, aged care, marine infrastructure – High. Power, community infrastructure, population centres, tourism – Moderate.
Flood event	Likely	Population centres, road access, power supply, agricultural industry – Moderate. Localised and Riverine flood history in Whitsunday area.
Earthquake (similar to 5.6M Newcastle earthquake event)	Rare	Building Stock – Extreme. Power, water supply, dams, communications, road, airports, maritime infrastructure, vulnerable people – High. Places of refuge and areas of significance – Moderate.
Landslip	Possible	History of landslip in the area due to heavy rainfall. Population centres on slopes of 15% or greater – High.

Tsunami – is considered rare but possible for Queensland (*Queensland Tsunami State Risk Assessment*). Tsunami studies have not yet been completed for Whitsunday Regional Council area.

Figure 16: Key risks to the region. Source: WRC'S Local Disaster Management Plan.

For the tourism industry in the region, the following hazards also need to be considered:

Hazards	Likelihood	Potential impact (vulnerability)
Extreme weather	Almost certain	As outlined above.
Climate change	Likely	Increased extreme weather, rising sea levels, acidification of the ocean, and movement of species e.g. crocodiles and jellyfish.
Shark attacks	Possible	Shark attacks within the region can impact visitor perceptions of safety and influence the desire to visit.
Coral bleaching	Possible	Loss of attractiveness of Great Barrier Reef. Less investment in reef protection. Death of coral.
Pollution	Possible	Lower air-quality making the destination less attractive.
Invasive Species	Likely	Infestation on the Great Barrier Reef or on-land causing loss of species or attractiveness of environment.
Accidents and safety concerns	Likely	Visitor accidents or death of tourists leading to the perception of danger. Less competitive as a destination.
Travel restrictions	Rare	Reduction of visitors.
Economic downturn	Possible	Lower yield or reduction of visitors.
Competition	Possible	Increased competition globally leads to reduction of visitors.
Overcrowding	Possible	Loss of attractiveness in destination. Damage to eco-systems.

Figure 17: Risk considerations for the Whitsundays' tourism industry.

The risks outlined have the ability to cause physical, financial, and reputational damages across the Whitsundays.

Along with the robust Disaster Management Plan, work should be done within the community to educate businesses and community members on the importance of understanding their material risks, and how to be prepared for, and manage, a risk or disaster event.

Action needed:

1. Advocate for, and contribute to, a refreshed Local Disaster Management Plan to set the path for the next 3-5 years.
2. Build industry support around understanding, preventing, preparing for, responding to, and recovering from disaster situations to build resilience.
 - a. Undertake climate adaptation and mitigation action, including building back a better and more climate resilient community after disasters.
3. Ensuring representation of the Whitsundays tourism industry in the Local Disaster Management Group.

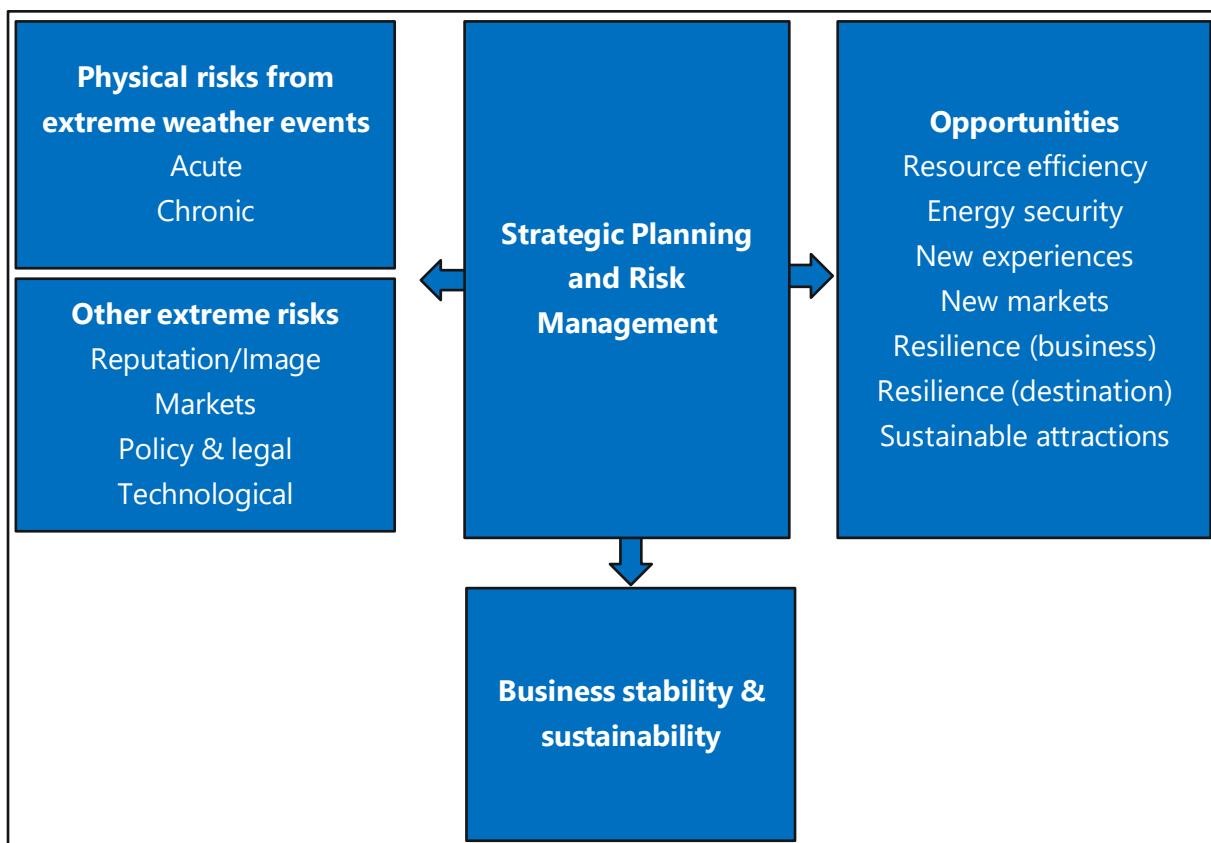


Figure 18: Strategic Planning and Risk Management.

Planning for the Carbon Economy

Climate change is one of the greatest challenges facing the modern world and its impacts, including extreme weather events and coral bleaching, poses a significant threat to the Whitsundays tourism industry.

The Whitsundays region is guided by both the Queensland State Government's Climate Action Plan, and the Whitsunday Regional Council's Climate Mitigation Strategy. Both of which map the pathway to net zero with notable milestones along the way for 2020, 2030, and 2050. Every business has a role to play in reaching this ambition.

Over the past 3 years the Whitsundays has taken industry-leading steps to manage their impact on the climate and environment. The Whitsunday Regional Council's development of the Climate Change Mitigation Strategy, along with the Climate Innovation Hub, demonstrates the desire to track and manage the region's climate impact and become leaders in destination sustainability.

The Whitsundays Healthy Heart project

While the Climate Innovation Hub in its original form has been discontinued, one of its key projects, the Whitsunday Healthy Heart project, was developed and continues to grow. As of September 2023, the Healthy Heart project has 45 committed members taking part in the project²⁷. The Healthy Heart is a four-year project with key aims is to help tourism operators measure and track their emissions, implement emissions reduction steps, increase resilience, and achieve Sustainable Development certification.

With the exceptional work that has been done to date, along with the community and operator engagement and support, it is strongly recommended that the region continues with this project well beyond its initial four-year time frame. A project of this nature is both innovative and progressive and helps the destination manage risks, build resilience, and obtain a competitive advantage in a time where travellers are seeking sustainable options²⁸.

Sustainable Tourism Management

Sustainable destinations take full account of the current and future social, economic, and environmental impacts and that address the needs of visitors, the industry, the environment and the host community. Sustainability and risk are intertwined with resilience built from a clear understanding of our regional vulnerabilities and how to reduce the impact.

The sustainability of the Whitsundays requires a balanced consideration of environmental, economic, and social cultural impacts. Careful and strategic management is required to reduce the negative impacts and enhance the positive impacts that the visitor economy can deliver.

Destination Commitment

At a local level, the Whitsunday Regional Council is committed to, and aligned with, both Federal and State Government reduction targets. The development of the *Whitsunday Regional Council Climate Change Mitigation Strategy* is focused on reducing Greenhouse Gas emissions from Council's corporate assets.

²⁷ Source: <https://www.whitsundayrc.qld.gov.au/news/article/232/whitsunday-healthy-heart-project-attracts-more-businesses-than-ever-before>

²⁸ Source: Booking.com Travel Predictions 2024 - <https://www.booking.com/c/trends/travelpredictions2024.html>

Council has set reduction targets for 2020, 2030 and 2050 (Figure 19). To achieve these targets, all sectors of the economy need to be working collaboratively to play their part.



Figure 19: WRC Emissions reduction targets. Source: WRC.

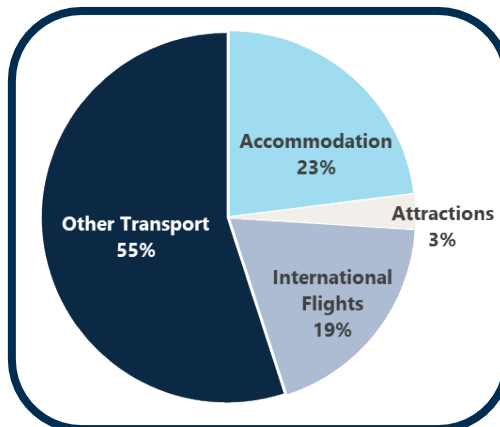


Figure 20: Tourism Emissions profile for the Whitsundays. Source: QRTN.

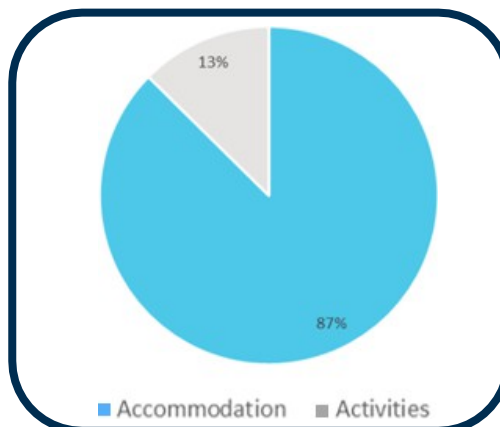


Figure 21: Actionable emissions profile for the Whitsundays tourism industry. Source: QRTN.

Current emissions snapshot

Through the Queensland Climate Action Plan, the Queensland State Government has set out the below targets:

- 30% emissions reduction below 2005 levels by 2030.
- 75% emissions reduction below 2005 levels by 2035.
- Net zero emissions by 2050.

In research published by the Queensland Region Tourism Network (QRTN), and based on a 3-year average data collected between 2017-2019, Queensland’s tourism related emissions for the same period were 10 Mt CO₂-e. With Queensland’s 2005 baseline tourism related greenhouse gas emissions set at 6.8 Mt CO₂-e, to meet the goal of 30% emissions below the 2005 levels, the Queensland tourism industry requires a 52% reduction in emissions.

Taken from the same research as above, the Whitsundays region 2005 baseline tourism related emissions were 297,062 tCO₂-e, and for the 2017-2019 period the region’s tourism related emissions

were 273,980 t CO₂-e. To achieve 30% emissions below the 2005 baseline levels by 2030 the region requires a 26% reduction in emissions.

The Whitsundays Greenhouse Gas Emissions

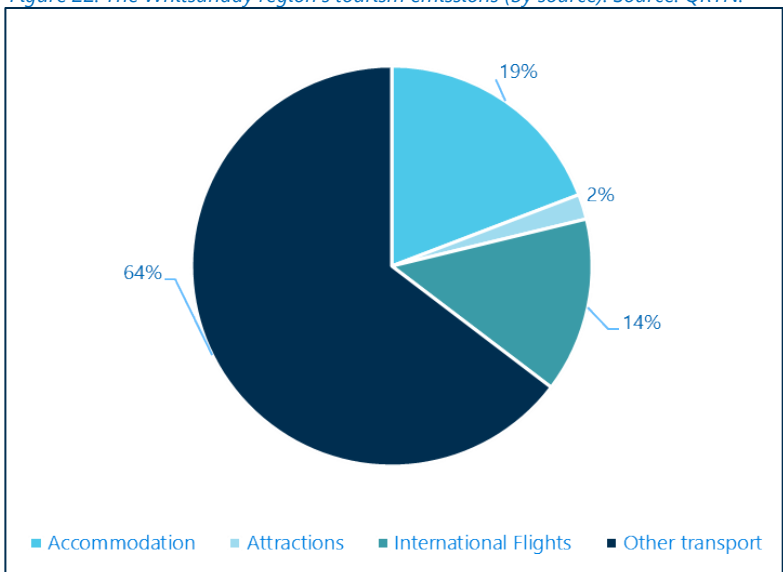
Aviation and transport are a significant part of the footprint of the region. Aviation is a challenge for all destinations, often with limited capacity to influence – other than through route preferencing. Working with in-region transport providers such as car-hire and buses, and encouraging active transport provides an opportunity to significantly reduce the transport related carbon footprint. Active transport within the region also becomes important.

Retrofitting accommodation with low carbon upgrades and renewable power will create the greatest impact across the 87% of emissions from the accommodation sector (*Figure 22*).

Advocacy around low-impact development should be prioritised, working with Council to prioritise developments with lower emissions profiles.

The region has done exceptional work in the areas of climate change mitigation and decarbonisation with the development of the Healthy Heart project. As the region looks to balance the reduction outcomes with restorative opportunities, the Whitsundays can engage visitors in restorative biodiversity activities aligned to the preservation, conservation, and enhancement of coastal and reef sites.

Figure 22: The Whitsunday region's tourism emissions (by source). Source: QRTN.



Mapping the Whitsundays Progress

The graph below (*Figure 23*) shows the path to reach the 2030 carbon targets mapped against the Queensland \$44 billion visitor expenditure goals.

Climate change is here, and commitment and action are required now. A balance is required between yield, visitor growth, supply, and emissions reduction to meet both the aspirational goals, and the climate reality.

All businesses, in every industry, play a role in reducing the global greenhouse gas emissions. Top measures to do this include use of renewable energy, energy audits and efficiency gains, water management, and waste reduction. Supply chain management is also critical.

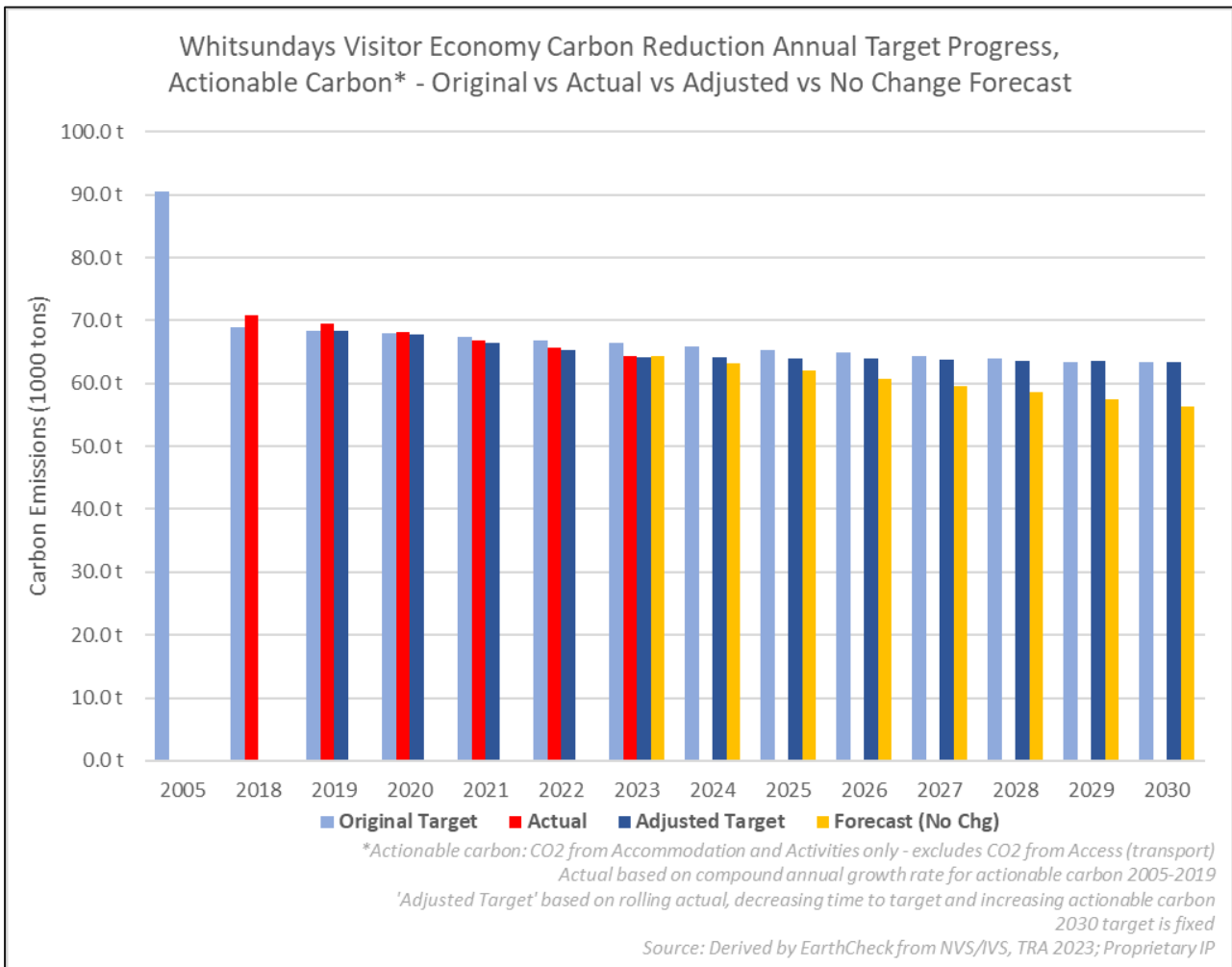


Figure 23: The Whitsunday visitor economy carbon reduction target. Source: TRA, 2023.

Action needed:

1. Extension of the Whitsunday Healthy Heart project for a minimum additional five years to grow the project to 80+ participants.
2. Scope projects within the region to develop climate contribution opportunities such as revegetation and regeneration projects, and social enhancement projects.
3. Become part of the ASPIRE Waste Network to reduce waste and greenhouse gas emissions.
4. Obtain Sustainable Destination Certification.
5. Communicate your sustainability activities and progress with your visitors and stakeholders.

06 – Accessibility

In 2022, the Queensland State Government announced that 2023 would be the *Year of Accessible Tourism*. According to the World Tourism Organisation²⁹ accessible tourism is:

“a form of tourism involving a collaborative process among stakeholders to enable people with access requirements (including mobility, vision, hearing and cognitive dimensions of access) to function independently and with equity and dignity by delivering universally designed tourism products, services and environments”.

Developing a destination that ensures visitors with varying abilities do not experience discrimination or exclusion not only forms part of a destination’s social sustainability, but also provides the destination with a competitive advantage and access to new markets.

As part of the state government’s *Year of Accessible Tourism* approach, Tourism Whitsundays, in partnership with Travability, undertook an audit to understand how the region was positioned to meet the needs to travellers with diverse abilities.

The Whitsundays rated well on the *Accessible Tourism in Queensland Assessment Report (2023)* with a wide variety of accessible facilities and infrastructure in place to offer visitors of varying ability access to tours, scenic trails, beaches, accommodation, and dining options.

The report outlines observations that individual businesses and the local government can take to increase the region’s accessibility including:

- The development of business specific accessibility guides.
- Individual business enhancements to make buildings, products, and experiences accessible.
- Additional disabled parking spaces throughout Airlie Beach.
- Addition of disabled toilet facilities in public areas across the region.

Per the observations provided by Travability Tourism Whitsundays, the Whitsunday Regional Council, and local operators and businesses should work together to strategically address and implement the recommendations.

Action needed:




1. Review and map out a pathway to implementation of Travability’s recommendations.
2. Publishing of a an up-to-date and easy to locate accessibility guide on the Tourism Whitsundays website to help share and promote accessible travel option across the region.

²⁹ World Tourism Organization 2013, Recommendations on accessible tourism, UNWTO, Madrid

07 – Strategy and Action Plan

Priorities for Success

Aligned to the *Towards Tourism 2032 Strategy*, to sustainably grow and accelerate tourism in the Whitsundays, the region needs to focus on its strengths whilst addressing gaps to create a successful future.

DEMAND, SUPPLY AND CONNECTIVITY	CATALYSTS FOR CHANGE	ENABLERS OF CHANGE
<p>STRATEGIC THEMES</p>  <p>Demand Supply Connectivity</p>	<p>STRATEGIC THEMES</p>  <p>Sustainability Brisbane 2032 Indigenous</p>	<p>STRATEGIC THEMES</p>  <p>Investment & funding Talent & skills New ways of working</p>
<ul style="list-style-type: none"> • The best nature, reef, and marine adventure experiences Australia has to offer. • Strong destination awareness in all key markets. • Holiday expenditure growth exceeds holiday visitor number growth (yield). • Overnight Visitor Expenditure increased to \$2.1 billion. • Increase share of ‘short break’ (4-7nights) trips to 54% for domestic market. • Increased focus and budget to establish European source market dominance. • Experience-led brand with leading transformational products and services on the water, on the islands, and on the mainland. • Integrated transport and access network in place to service all visitor markets (aviation and drive). • Adequate accommodation availability to meet the needs of the visitor market and local community. 	<ul style="list-style-type: none"> • Leading Australia in sustainable, accessible, and regenerative tourism experiences. • Recognised ecotourism destination with benchmarking, and certification for all operators. • Climate Change Strategy with pathway towards net zero emissions through the progression and development of the Whitsunday Healthy Heart and subsequent initiatives. • Decarbonisation offsets established and used to restore biodiversity in the region (trees, reef, and sea grass). • Positioning the region as a must-do holiday experience to be added in before or after visitors attend 2032 the Olympic Games in Brisbane. • Developing and supporting Indigenous experiences and products in the region to help visitors connect with, and learn from, Traditional Owners. 	<ul style="list-style-type: none"> • An increase in investment and marketing funds from TEQ & WRC. • Cross government and community support for investment in upgraded and new tourism infrastructure and services. • Development of a state government strategy to responsibly and sustainability promote investment and development of island resorts. • Investment prospectus delivering new accommodation infrastructure and tourism and convention facilities. • Successful development, operations, and marketing of the Whitsundays Skyway, and the Heart of the Reef Discovery centre. • Development of new 4.5-5 star branded accommodation on the mainland with conference and event facilities. • Agritourism prefeasibility complete and a strategy created to establish, develop, and grow the agritourism and food experiences in the region. • A united vision for tourism with key partnerships, and clearly

	<ul style="list-style-type: none">• New mainland experiences in place offering 365 days of delivery.• High-quality visitor experiences recognised under Queensland's Best of Queensland Experiences.	<p>defined roles and responsibilities in place to deliver economic growth and quality of life for the community.</p> <ul style="list-style-type: none">• A skilled workforce with satisfied employees and high retention rates.
--	---	---



Key Strategy Pillars

	Strategy Areas	Action	Outcomes
1	Destination Marketing	<ul style="list-style-type: none"> ➤ Brand enhancement and development. ➤ Development and delivery of a new festival and major event strategy. ➤ Build and maintain key trade and tourism sales platforms. ➤ Digital delivery. ➤ Technology & AI. 	<ul style="list-style-type: none"> ➤ Strong destination and brand awareness. ➤ Unified, region-wide event promotion to encourage dispersion. ➤ Digital ready tourism industry. ➤ Strengthened connection with existing markets and investment in new markets.
2	Destination Stewardship	<ul style="list-style-type: none"> ➤ Establish regional funding and partnership agreements. ➤ Regional investment prospectus in place. ➤ Integrated regional tourism transport strategy. ➤ Development of tourism infrastructure and event services in key tourism precincts. ➤ Regional tourism climate action and risk management action. ➤ The management of short-term accommodation. 	<ul style="list-style-type: none"> ➤ Long term funding and partnership agreements in place with key stakeholders. ➤ Indigenous storytelling and product development. ➤ Dedicated state and local government investment support for the identification and approval of development proposals ➤ To ensure that all precincts adequately cater to visitor needs and expectations. ➤ Position the Whitsundays as a leader in climate change and sustainability.
3	Products & experience Delivery	<ul style="list-style-type: none"> ➤ Experience development strategy. ➤ Nature based tourism and eco-tourism strategy. ➤ Development of a regional agritourism strategy. ➤ Quality service – Customer Service Heroes Program. 	<ul style="list-style-type: none"> ➤ Strategic understanding and approach to managing and developing the region’s experiences offerings. ➤ To establish the Whitsundays as a leading ecotourism destination. ➤ Develop an agricultural tourism strategy. ➤ A unified approach to providing high-quality customer service across the region, ensuring consistent value is provided on the ground.

Action Plan

Actions under this plan are aligned to the State framework with build, evolve and transform timeframes.

Destination Marketing

Aim: To position the region as the globally recognised Great Barrier Reef destination and the destination of choice for the best reef, nature, and marine tourism experiences.

ACTION	LEAD (L) & PARTNER (P)	TIMEFRAME
<p>1.</p>	<p>Brand enhancement and development.</p> <ul style="list-style-type: none"> • Action 1: Continue to develop and enhance The Whitsundays' brand - The Heart of the Great Barrier Reef - both in creative design, and the continued investment in marketing activities that aligns with, and supports the growth of, the Whitsunday region's diverse industry. <p style="margin-left: 20px;">Aim: Continued brand development that connects with target audiences and authentically represents the region.</p> • Action 2: Continue to develop and deliver brand training materials and programs (including guides, recorded webinars, and marketing mentorship) for tourism businesses and operators to facilitate brand understanding and engagement. <ul style="list-style-type: none"> ○ Workshops should be held to guide operators and businesses through the brand, and actionable steps that they can take to express the brand through their operations and marketing activities. ○ Brand Playbook, Xcelerator program and Brand Ambassador program to be maintained. Website data maintenance and data monitoring should be updated to help track performance. ○ Develop a marketing mentorship program that pairs small – medium businesses with businesses that are well established Whitsunday brand stewards. <p style="margin-left: 20px;">Aim: Continue to build and maintain strong brand alignment and engagement across the region.</p> • Action 3: A new partnership agreement needs to be put in place with WRC to agree on brand alignment and the role and responsibilities for marketing and promotion of the destination. <p style="margin-left: 20px;">Aim: Alignment on brand messaging and promotion of the destination.</p> 	<p><i>L: TW</i> <i>P: Industry & operators</i></p> <p><i>Year 1 – ongoing</i></p> <p><i>L: TW</i> <i>P: Industry & operators</i></p> <p><i>Year 1 – ongoing</i></p> <p><i>L: TW & WRC</i></p> <p><i>Year 1 - ongoing</i></p>
<p>2.</p>	<p>Development and delivery of a new festival and major event strategy.</p> <ul style="list-style-type: none"> • Action 1: Collaboration with the Whitsunday Regional Council to refresh and further develop the region's current event strategy 	<p><i>L: WRC</i> <i>P: TW, TEQ,</i></p> <p><i>Year 1 - ongoing</i></p>

ACTION		LEAD (L) & PARTNER (P)	TIMEFRAME
	<p>(2019-2023). The event strategy needs to identify region-wide established events and map opportunities and sites to encourage and foster new events.</p> <p>The strategy should clearly identify how the region will support events through funding, marketing, and continuation of the event mentoring program. The role and responsibility for each organisation for event promotion and management needs to be agreed.</p> <ul style="list-style-type: none"> ○ Events such as Hamilton Island Race Week play a key role in showcasing the destination and balancing out seasonality. ○ Where possible build on the Queensland Music Trails program which is underway. ○ The role for funding and promoting business events needs to be addressed. Dedicated funds will be needed to support the growth of this market. <p>Aim: To develop the region as an event destination to support year-round visitation and visitor dispersion across the region.</p>	<p><i>Industry & operators</i></p>	
3.	<p>Continue to build key trade and tourism sales platforms.</p> <ul style="list-style-type: none"> • Action 1: Collaboration and active trade partnerships between operators need to be nurtured. Operators need to work as a team and hunt as a pack in trade and market promotions. <p>As part of brand development and messaging, help operators to develop joint packages which communicate the brand values associated with the proximity to the Great Barrier Reef, the region’s pristine natural environment, and the region’s key icons.</p> <p>Develop a strategy to foster the region’s representation at key trade and tourism sale events and promotions, for both domestic and international markets.</p> <p>The strategy should help to map a pathway to a 25% (+28) increase in Whitsundays operators on TEQ’s ‘Best of Queensland’ list by 2028.</p> <p>Aim: Market collaboration and increased destination awareness in key established, and developing, domestic and international markets.</p>	<p><i>L: TW P: TEQ, TA, Industry & operators</i></p>	<p><i>Year 1 - ongoing</i></p>
4.	<p>Digital delivery.</p> <ul style="list-style-type: none"> • Action 1: Investment in new, high-quality visual assets (photography/videography) to showcase products and experiences to highlight the region’s USP’s. The assets should not only showcase and support large businesses but should also demonstrate that the region’s products and experiences are welcoming and accessible to all. <p>Aim: Build stronger brand alignment through digital delivery which also and supports the principles of diversity, accessibility, and inclusion to target markets.</p>	<p><i>L: TW P: TEQ, ATDW</i></p>	<p><i>Year 1 – ongoing</i></p>

ACTION		LEAD (L) & PARTNER (P)	TIMEFRAME
	<ul style="list-style-type: none"> Action 2: Develop digital marketing support materials to facilitate a digital ready industry. The materials should cover building and updating websites, maintaining social media accounts, communication of key messages, brand alignment through digital channels, and accessing the library of visual assets available through TW and TEQ. <p>Aim: Improving the region’s digital brand alignment and communications channels.</p>	<p>L: TW P: TEQ, ATDW</p>	Year 1 - ongoing
5.	<p>Technology and AI.</p> <ul style="list-style-type: none"> Action 1: Partner with TEQ and the State Government to understand how AI can support the marketing and development of the tourism industry in the Whitsundays region. This is a rapidly changing technology and current research is underway at DTS and TEQ to determine how best to use AI in business and marketing applications. This would include the use of chatbots, predictive analytics customer enquiries, and data driven marketing strategies. <p>Aim: To ensure the region is AI and digital ready, on top of trends and shifts in the market, and continually striving to meet new visitor needs.</p>	<p>L: TW P: TEQ, DTS</p>	Year 2 – 3

Destination Stewardship

Aim: A well-managed and sustainable visitor economy with cross government, business, and community support for investment in marketing, and upgraded and new tourism infrastructure and services.

ACTION		LEAD (L) & PARTNER (P)	TIMEFRAME
1.	<p>Establish regional funding and partnership agreements.</p> <ul style="list-style-type: none"> Action 1: Establish funding and partnership agreements between key stakeholders including Whitsunday Regional Council, Tourism and Events Queensland, Tourism Australia, Traditional Owners, and State Government Agencies to ensure marketing, advocacy and dedicated project facilitation and support. <ul style="list-style-type: none"> o In the first instance, a new partnership agreement needs to be established with WRC concerning the funding of destination marketing and the role and responsibility of each party for regional events, business events, and product development. o WRC plays a significant role in tourism as it is a tourism operator facilitator, promoter of economic development, and it supports key visitor services and transport infrastructure. o There is an opportunity to develop and foster partnerships between Traditional Owners and the tourism industry to 	<p>L: TW P: WRC, TEQ, TA, DTS, TO's, MIW, GBRMPA,</p>	Years 1 -2 and ongoing

ACTION		LEAD (L) & PARTNER (P)	TIMEFRAME
	<p>support the development of new tourism experiences and products.</p> <ul style="list-style-type: none"> ○ The agreements should include key projects, roles and responsibilities, funding sources, communication information and key points of contact for each organisation. <p>Aim: Long term funding and partnership agreements in place with key stakeholders.</p> <ul style="list-style-type: none"> ● Action 2: Develop a strong funding model for tourism in the Whitsundays region. <p>Increased funds for destination marketing will be required to successfully maintain current visitor yield, drive overnight stays and facilitate the state’s aspirational growth target.</p> <p>A review is needed of current funding sources and the identification of opportunities for accessing additional funding for destination marketing, product development and investment in new tourism services and infrastructure.</p> <p>Aim: Obtain sufficient funding for destination marketing and management activities to support tourism growth in the region.</p>	<p>L: TW P: WRC</p>	<p>Years 1 -2</p>
2.	<p>Regional investment prospectus in place.</p> <ul style="list-style-type: none"> ● Action 1: In partnership with the Whitsunday Regional Council and the Department of Tourism and Sport, develop an investment prospectus to map, communicate, and encourage investment in accommodation facilities and tourism attractions on the islands, and within the wider region. The prospectus should include a supply and demand analysis supported by data, and mapping of identified sites and supporting information. ○ Project facilitation is needed by the State Government. <p>Aim: Dedicated state and local government investment support for the identification and approval of development proposals.</p>	<p>L: WRC P: DTS, TW</p>	<p>Year 1-2 and ongoing</p>
3.	<p>Integrated regional tourism transport strategy.</p> <ul style="list-style-type: none"> ● Action 1: In partnership with the Whitsunday Regional Council and the State Government, develop an integrated tourism transport strategy that maps and manages transport access and infrastructure across the region. This includes the aviation, marine, and regional road networks. ○ The plans for all transport sectors generally exist. What is needed is a focus on how they work together to support the access and travel needs of visitor markets to the region. <p>Aim: To develop and maintain a strategic approach to delivering an integrated regional tourism transport strategy for the destination.</p>	<p>L: WRC P: TW, TMR, GBRMPA, State government depts.</p>	<p>Years 1 – 3 and ongoing</p>
4.	<p>Development of tourism infrastructure and event services in key tourism precincts.</p>		

ACTION	LEAD (L) & PARTNER (P)	TIMEFRAME
<ul style="list-style-type: none"> Action 1: Regional collaboration and resources are needed to support the ongoing development of dedicated tourism precinct plans in key tourism gateways across the region. This would include further development of: <ul style="list-style-type: none"> The Greater Airlie Beach Masterplan The Bowen Marina Masterplan Superyacht Infrastructure and moorings Shute Harbour Marine Terminal <p>Aim: To ensure that all precincts deliver a world class experience and adequately cater to visitor needs and expectations.</p> 	<p>L: WRC P: TW, State government depts.</p>	<p>Years 1 – 3 and ongoing</p>
<p>5. Regional tourism climate and risk management action.</p> <ul style="list-style-type: none"> Action 1: Collaboration with the Whitsunday Regional Council to provide tourism industry related advice, expertise, and perspectives to further support the implementation and execution of the council’s Climate Change Mitigation Strategy. <p>The collaboration should identify and examine genuine and effective ways that the tourism industry can align and deliver on WRC’s identified strategic outcomes, targets, and actions. This includes working together to continue the incredible work being done through the Whitsundays Healthy Heart project.</p> <ul style="list-style-type: none"> A carbon footprint has been established for the destination, and a decarbonisation pathway has been put forward to guide what action is needed to reduce the region’s footprint (see Section 5 of this DMP). The Whitsundays region should look to obtain Sustainable Destination Certification to recognise the work that has been undertaken and identify ways that TW and WRC can further collaborate to improve the region’s climate action. Where possible, establish tourism industry representation in the Local Disaster Management Group to contribute to the Local Disaster Management Plan. <p>Aim: Establishing tourism industry support for the regional Climate Change Mitigation Strategy, and to position the Whitsundays as a leader in climate change and sustainability.</p>	<p>L: WRC P: TW, TEQ, DESI, DTS</p>	<p>Years 1 - 2</p>
<p>6. The management and regulation of short-term accommodation</p> <ul style="list-style-type: none"> Action 1: Collaboration on the management of short-term rental accommodation (STRA) in the region. <ul style="list-style-type: none"> Short-term rental accommodation (STRA) refers to accommodation that falls in-between visitor accommodation (e.g., hotels) and more formal long-term accommodation arrangements (e.g., property rentals). An important issue that has been raised in the region is the impact of STRA on housing affordability and availability. This 	<p>L: WRC P: TW, DTS</p>	<p>Year 1 – 2</p>

ACTION	LEAD (L) & PARTNER (P)	TIMEFRAME
<p>includes the key question of whether STRA is having a fundamental impact on housing supply.</p> <p>The Whitsunday Regional Council has recognised the need to act and has implemented a number of initiatives to manage the impacts of STRA. Tourism Whitsundays and the WRC should work together to determine how STRA can be better managed to support the wider aims of tourism management in the region.</p> <p>Aim: Understanding the impacts of STRA in the region, and the potential of STRA to further support destination management.</p>		

Products and Experience Delivery

Aim: A vibrant, sustainable, and connected region delivering worldclass transformational products and experiences that benefit the whole community.

ACTION	LEAD (L) & PARTNER (P)	TIMEFRAME
<p>1. Experience development strategy.</p> <ul style="list-style-type: none"> • Action 1: Undertake a regional experience development and accessibility strategy. The strategy would include: <ul style="list-style-type: none"> ○ Audit and Identification of hero experiences. ○ Review and mapping of the region’s current, and planned, accessible experiences based on the implementation of Travability’s recommendations. ○ Establish product clusters and identify strategies for development and marketing of each cluster. ○ Identify and maintain the integrity of the region’s traditional key nature and adventure experiences. These experiences (e.g. snorkelling on the GBR) are essential elements to The Whitsundays’ brand and form the foundation of the region’s identity. ○ Identify key messages, communication channels, and storytelling avenues, and provide industry training and support. <ul style="list-style-type: none"> ▪ Part of the communication approach should include publishing an accessibility guide on the Tourism Whitsundays website to help share and promote accessible travel options across the region. <p>Aim: Strategic understanding and approach to managing and developing the region’s iconic experience offerings and establishing accessibility at the heart of the region.</p>	<p>L: TW P: TEQ, WRC, Industry & operators</p>	<p>Years 1-2</p>

<p>2.</p>	<p>Nature based tourism and eco-tourism strategy.</p> <ul style="list-style-type: none"> • Action 1: The development of a nature based and ecotourism strategy in alignment with the State government’s <i>Ecotourism Plan for Queensland’s Protected Areas (2023–2028)</i>. As part of the strategy, frameworks should also be established for: <ul style="list-style-type: none"> ○ Citizen science and education programs ○ First Nations experiences and products ○ Hiking and mountain biking trails ○ Reef education and training facility <p>Aim: To establish the Whitsundays as a leading ecotourism destination.</p>	<p>L: WRC P: TW, TEQ, DESI, QLD Parks, TO’s</p>	<p>Years 1 - 3</p>
<p>3.</p>	<p>Development of a regional agritourism strategy.</p> <ul style="list-style-type: none"> • Action 1: Develop a cross-regional agritourism strategy. <p>Phase 1: Research & Development</p> <ul style="list-style-type: none"> ○ Review the agritourism landscape, opportunities, barriers to entry, and support available in alignment with the <i>National Agritourism Strategy Framework (Agritourism 2030)</i> and the <i>Queensland Farmer’s Federation Agritourism Roadmap (2020)</i>. <p>Phase 2: Partnership Agreements & Strategy Development</p> <ul style="list-style-type: none"> ○ Agritourism and farm-to-table experience strategy is created, clearly establishing the pathway for the development of the product. <p>Phase 3: Product Development</p> <ul style="list-style-type: none"> ○ Product development: <ul style="list-style-type: none"> ○ farm gate experiences ○ farm-to-table dining experiences ○ farmers markets ○ agritourism trails <p>Aim: Development of a regional an agritourism strategy.</p>	<p>L: TW P: WRC, MIW, State government depts., Industry & operators</p>	<p>Years 1 -2 and ongoing</p>
<p>4.</p>	<p>Quality service – Customer Service Heroes Program</p> <ul style="list-style-type: none"> • Action 1: Adoption and wide-spread implementation of the Customer Service Heroes Program³⁰. <p>Aim: Establishing a unified approach to providing high-quality customer service across the region, ensuring consistent value is provided on the ground.</p>	<p>L: TW P: Industry & operators</p>	<p>Year 1 - ongoing</p>

³⁰ Customer Service Heroes Program created by 8 Seconds.

Targets & Performance Indicators

Recommended Targets

Overnight Visitor Expenditure (OVE)

- Increase Overnight Visitor Expenditure to \$2.1 billion.

Yield

- Balance visitor yield (maintain a higher expenditure growth rate than visitor growth rate).

Domestic Holiday Visitors

- Increase 'Short Break' (4-7n) share to 54%¹, broken down as:
 - Intrastate Short Break (4-7n) share to 50%
 - Interstate Short Break (4-7n) share to 68%

Note: Supporting data can be found in Appendix 4.

- Increase Older SINKs/DINKs market share to 33.5%², broken down as:
 - Intrastate Older SINKs/DINKs share to 30%
 - Interstate Older SINKs/DINKs share to 37%

Note: Supporting data can be found in Appendix 5.

International Holiday Visitors

- Increase focus and budget to establish European source market dominance within High Value Travel(er) to Australia.
- Increase attraction of Eastern source markets through emphasis on destination-of-choice for Europeans with the aim to increase national share of the visitor markets below³:

↑ UK visitors to 20.0%

↑ German visitors to 25.0%

↑ Scandinavian visitors to 25.0%

↑ Western Markets visitors to 20.0%

↑ Eastern Markets visitors to 3.0%

Note: Supporting data can be found in Appendix 6.

Key Performance Indicator's

Based on a balanced score-card approach for measuring the impact of tourism and aligned to the UNWTO's 2024 *Statistical Framework for Measuring the Sustainability of Tourism*³¹, the following indicators will be tracked, with 2023 setting a benchmark measure to monitor over the lifespan of the DMP.

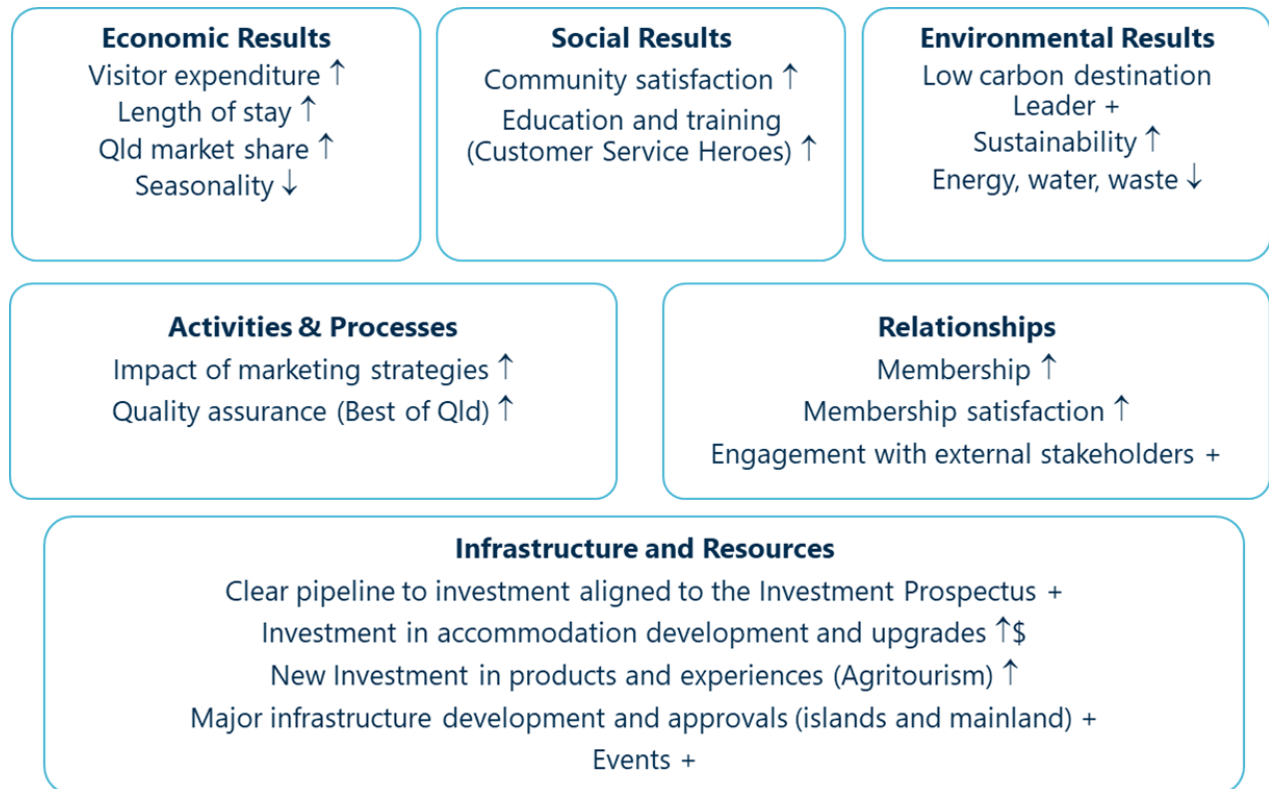
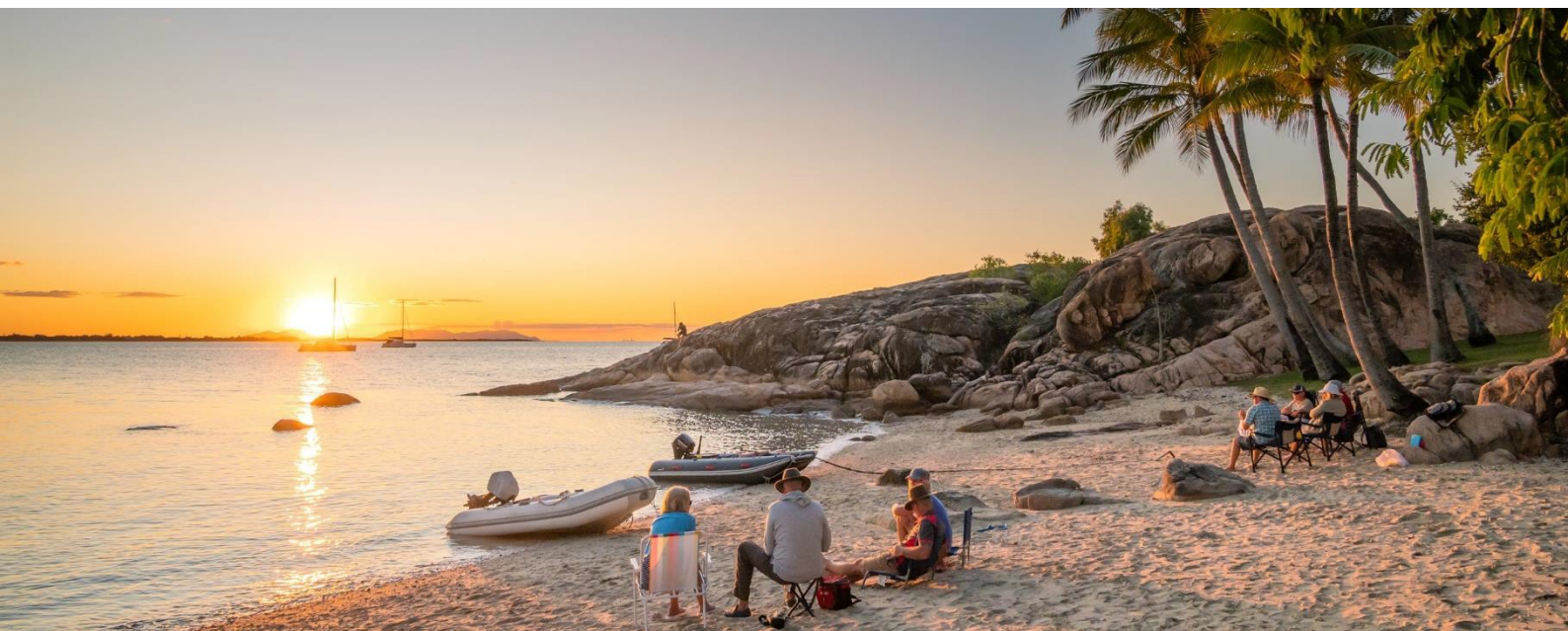


Figure 24: Key Performance Indicators.



31 UNWTO *Statistical Framework for Measuring the Sustainability of Tourism. 2024.*
https://unstats.un.org/UNSDWebsite/statcom/session_55/documents/BG-4a-SF-MST-E.pdf

08 – Appendices

Appendix 1 - Policy Overview

The Whitsunday Destination Management Plan aligns to and supports a broader policy framework, including the current tourism policy at a federal, state, and local level. Below is a list of the policies, regulations, plans and strategy documents that have informed this Destination Management Plan.

<p>Federal</p>	<ul style="list-style-type: none"> <p>Thrive 2030 – Austrade</p> <p>The federal framework for tourism development focuses on recovery, capacity building and resilience of the visitor economy. Across three core themes of collaborate, modernise, and diversify, the strategy aims to grow high quality visitor experiences, industry connectivity, collaboration, and workforce development.</p> <p>National Agritourism Strategy Framework – Australian Regional Tourism LTD (Agritourism 2030)– The NASF examines the strong, emerging agritourism sector in Australia and details the foundations for growth of this sector, the competitive advantage, sustainability, and reconciliation opportunities of the sector, and how this shift will enable farmers to diversity their product offering, mitigate risks, and build resilience within the industry. This National Strategy Framework is designed to unify an emerging sector under one voice in two ways: 1) Support a sustainable approach to growth, reflective of the holistic benefits of Agritourism to regional communities, land, culture, and business. 2) Consider how a unified national framework, with an eye to Agritourism’s export potential, can enhance Australia’s international reputation into the future.</p>
<p>State</p>	<ul style="list-style-type: none"> <p>Towards Tourism 2032: Transforming Queensland’s visitor economy to welcome the world – A collective framework to set the direction of tourism in Queensland for the next 10 years. The strategy offers three pillars of development; demand, supply, and connectivity; catalysts for change; and enablers of change. The actions are designed to reach a \$34 billion aspirational spend target by 2027 and \$44 billion by 2032.</p> <p>Inclusive Tourism: Making your business more accessible (2016-2020) – This guide supports operators and destinations to embed inclusive approaches to tourism management, to increase knowledge, and to deliver on legal obligations.</p> <p>Deadly Innovation Strategy -State of Queensland Department of Tourism, Innovation and Sport - Developed in partnership with the Aboriginal and Torres Strait Islander Business and Innovation Reference Group and other key stakeholders, the strategy articulates new pathways to delivering economic opportunities to Indigenous communities. The three key actions are; Identify and support a pathway for Indigenous businesses and innovators to achieve success; Broaden access to existing opportunities and strengthen respect for</p>

Indigenous people to improve their participation; Secure funding and backing feasible deals.

- **Queensland Climate Adaption Strategy 2017-2030** – The climate adaption strategy maps out Queensland’s pathway towards preparation and mitigation of the risks associated with climate change. The strategy is built around four key objectives; Recognise; Equip; Integrate; and Collaborate. To achieve on these objectives, the strategy sets out four strategic pathways:
 5. **People and knowledge:** empowering best practice, education, and engagement among communities.
 6. **State government:** ensuring the risks and opportunities associated with climate adaption are reflected in policies, regulations, and procedures.
 7. **Local governments and regions:** working with local governments and regional organisations to ensure that solutions and climate risks are reflected in planning and decision making.
 8. **Sectors and systems:** Assist sector leaders to collaborate across government, organisations, and communities to identify adaptation needs and to prioritise adaptation activities.
- **Building a Resilient Tourism Industry: Queensland’s Climate Change Response Plan (2018)** – Climate change is a risk and an opportunity too big to ignore. The strategic plan is underpinned by ambitious actions to support Queensland’s tourism industry to proactively respond to climate change and lead the way as a steward for its environment.
- **TEQ Events Strategy 2025** – Provides a platform to realise the TEQ vision of inspiring consumers to visit Queensland to experience the best events in Australia. There are three fundamental pillars; leveraging the competitive advantage of TEQ; strategic partnerships with destinations and events; and agreement on metrics to inform optimal event investment.
- **Queensland Farmers Federation Agritourism Roadmap (2020)** – The report reviews and documents the emergence and growth of the agritourism industry and the roadmap aims to position Queensland as Australia’s Agritourism capital. The roadmap identifies the core themes and six strategic actions where collaborative effort is required to establish a thriving agritourism sector across regional Queensland.
- **Ecotourism plan for Queensland’s Protected Areas 2023-2028** -
 The Ecotourism Plan provides the framework for planning and delivering immersive ecotourism experiences in Queensland’s spectacular national and marine parks and other protected areas. The plan acknowledges challenges posed by the COVID-19 pandemic to the tourism industry and outlines the government’s commitment to foster innovative ecotourism opportunities and experiences that allow visitors to actively provide a positive contribution back to Queensland’s protected areas and local communities while helping to rebuild a sustainable, resilient ecotourism industry. The Plan begins to re-frame how we think about sustainable ecotourism and focuses on visitors consciously connecting with and contributing to where they visit. There is also a strong focus

	<p>on working with First Nations partners to build their capacity in offering cultural experiences.</p> <ul style="list-style-type: none"> • Queensland Superyacht Strategy 2018-2028 – The QLD Superyacht strategy acknowledges the contributions that superyacht visitors make to the QLD economy and sets a strategic map for the facilitation and development of this market through five priority action areas. The priority action areas are as follows: Priority 1 - Supportive policy environment; Priority 2 – Infrastructure for growth; Priority 3 – Promoting Queensland as a global superyacht destination; Priority 4 – Strengthening supply chains; and Priority 5 - Promoting superyacht visits for the Brisbane 2032 Olympic and Paralympic Games.
<p>Local</p>	<ul style="list-style-type: none"> • Whitsunday Regional Council - Regional Economic Development Strategy 2022-2025 - The strategy provides a blueprint for the region’s future to 2030, and includes the pillars of education and job readiness, business investment, community connections and enabling infrastructure to drive the strategic focus of the region. • The Whitsundays Destination Tourism Plan 2019 – 2024 - Led by Tourism Whitsundays, the plan works to the vision of showcasing the Whitsundays as the globally recognised Great Barrier Reef destination. The high-level aim for the plan is to increase overnight visitor expenditure to \$2.14b by 2025 through increased length of stay and average daily spend. To achieve this, products and experiences that exceed the visitor expectations are required. • Tourism Whitsundays Annual Report 2022/2023 - The report outlines the performance of Tourism Whitsundays over the fiscal period. The period was noted as the first year of open borders and restriction-free movement since COVID three years earlier. The Whitsundays demonstrated another strong year for the region’s tourism, however, it also noted that it saw a decrease in occupancy due to outbound tourism as border restrictions eased. • Whitsunday Region Local Disaster Management Plan 2022-2023 – The plan aligns with the Disaster Management Act 2003. It aims to ensure community safety through the development of effective Disaster Management strategies to ensure effective co-ordination of available resources to assist communities to; 1. Mitigate wherever possible the potential adverse effects of an event; 2. Prepare for managing the effects of an event; and 3. Effectively respond to, and recover from, a disaster or an emergency situation. The Whitsunday Regional Council, in accordance with the Disaster Management Act 2003, has established the Whitsunday Local Disaster Management Group which serves a wider range of planning, management, advice, and community awareness functions. • Whitsunday Region Emergency Action Guide 2020-2022 – The emergency action guide documents the region’s greatest risks, the processes for risk mitigation, and provides action plans for periods of emergency and recovery. • The Whitsunday Regional Major Festival and Events Attraction Strategy 2019-2023 - Recognised for the economic opportunities that major events and festivals bring to a region, the Whitsunday Regional Council led the strategy

which sets out vision, priorities, goals, and actions to attract, develop, and maintain a strong events calendar to stimulate growth.

- **Shute Harbour Marine Terminal Annual Performance Plan 2022-2023** - Redeveloped and reopened after the 2017 Tropical Cyclone Debbie, the Shute Harbour Marine Terminal performance plan outlines the vision, objectives, obligations, and investments of the facility to facilitate and promote growth for the future.
- **Whitsunday Coast Airport Annual Performance Plan 2022-2023** - The performance plan provides an overview of the regional airport, its operations, objectives, and targets. It outlines the asset’s financial targets (Post COVID fully operational by end of 22/23FY), and non-financial targets of maintaining presence in existing markets, introduction of new routes, Freight Hub Implementation, and development of an Asset Management Plan.
- **Whitsunday Regional Council Climate Change Mitigation Strategy (n.d)** - The strategy outlines the council’s commitment to reducing its greenhouse gas emissions. It details the WRC’s 7 strategic outcomes and targets in line with the Paris Agreement, Australian Government National Climate Policy, and the Queensland Government Policies. It outlines the 15 priority actions that it will take to achieve its goals and targets.
- **Whitsunday Regional Council Asset Management Strategy 2022-2026** - The strategy provides an overview on Council management of assets to maximise their value in a way that meets corporate objectives and within the financial and risk constraints of Council. The future state of assets is to be at a sustainable service level that meets community needs, are used through consistent, considered and evidence-based decisions, and are fit for purpose.
- **Whitsunday Coast Airport (WCA) Masterplan and Feasibility Study (July 2015)** – The WCA Masterplan report, compiled for the Whitsundays Regional Council, strategically maps out a 20-year plan (2015-2035) for the airport. The report reviews the existing facilities and infrastructure, planning legislative context, and future growth forecasts in order to identify the required short-medium term upgrades to infrastructure, freight facilities, and commercial development opportunities.
- **Lake Proserpine Master Development Plan (2021)** - The Lake Proserpine Masterplan report, compiled for the Whitsundays Regional Council, was an outcome of the Proserpine Sustainability and Future Growth Master Plan which detailed five key projects for improvement across Proserpine. Upgrades to the Lake Proserpine area was one of the five key projects, and as a result the plan was created to support and deliver on this project and included a site and land use analysis which resulted and proposed development of new and existing facilities including campgrounds, BBQ facilities, pontoons, a path network, and accommodation.
- **Whitsundays Trails Concept Plan (2020)** – Commissioned by the WRC, the purpose of the plan is to explore the potential for development of a nationally-significant mountain bike destination in the WRC area. The project aims to

invigorate the tourism industry, particularly during the current shoulder and off seasons. The project will also play an important role in assisting the region's economic recovery following the COVID-19 pandemic.

Appendix 2 - Core Market Analysis

Core Markets (Domestic):

1. SINKS/DINKS

About: The SINKS (Single Income No Kids) and DINKS (Dual Income No Kids) markets are generally broken up into a younger and older segment. The category can apply to couples, or solo travellers and both segments share the key characteristic of lack of kids. Travellers in the older SINKS/DINKS category tend to be less price sensitive and have more freedom and less restrictions when planning a trip.

Considerations: This market segment is important to the Whitsundays as they present an opportunity for longer stays, higher expenditure, and seasonal dispersion. It is recommended that further review and research into this market is taken in the wake of the COVID-19 pandemic.

2. Aussie Families:

About: Aussie families with school aged children are generally broken into two categories: older, and younger. Older families are those that still have children living at home, but the children are all over the age of five. Families are an important market for the region, as they contributed 35.5% of intrastate, and 31.3% of interstate domestic travellers in the period of 2021-2023 (Tourism Research Australia, 2023). When looking at the domestic family markets, older families are a higher value by share for both share of The Whitsundays, and the State (*Figure 10, Pg 33*). Older families, while still mostly bound to school holiday travel periods, tend to have more flexibility and mobility than younger families.

Considerations: Intrastate older family segments remained relatively stable between the 2017-2019 and 2021-2023 periods, whereas interstate older family segments dropped 5.2% over the same period (*Figure 10, Pg 33*). Border restrictions may have contributed to this drop in share, however, as it is a critical market for the region, it's important that marketing efforts work to maintain the strength of this segment.

3. Empty Nesters

About: The empty nester market is comprised of parents of older kids who have moved away from the family home. Like SINKS/DINKS, empty nesters are not constrained by the responsibilities of young families (school holidays, children's sport and activity commitments etc.) so demonstrate more freedom and flexibility when booking a trip.

Considerations: As empty nesters demonstrate flexibility and limited constraints, they are an important target market for the region as they present an opportunity for longer stays, higher expenditure, and regional dispersion through the Grey Nomad segment.

4. Drive Market

About: The drive market comprises of any visitors that arrive to the region by road and encompasses everyone from younger families to the grey nomad segment. The drive market began to see a downturn over the 2018-2019 period (*Figure 25*), however, this shift reversed during the pandemic. The Australian tourism industry saw a significant rise in the drive market as restrictions and uncertainties around international travel and domestic flights impacted their travel options.

Considerations: As the drive market tends to be less rigid with plans and tends to travel further across a region, this market is an important market of focus to promote dispersion and share the positive social and economic impacts of tourism region wide.

5. Cruise

About: For the 2023-2024 period the Shute Harbour Marine Terminal expects to reach 100,000 cruise ship passengers³². While cruise passengers tend to be considered day-trippers and return to their accommodation on the ship, they present an incredible boost to the local economy through shopping, tours, and dining.

Considerations: With strategic marketing efforts, and development of new products and experiences across the region, the cruise market presents an opportunity for region wide visitor dispersal. It is important to ensure the on the ground facilities can meet the demands placed on them by an influx of visitors.

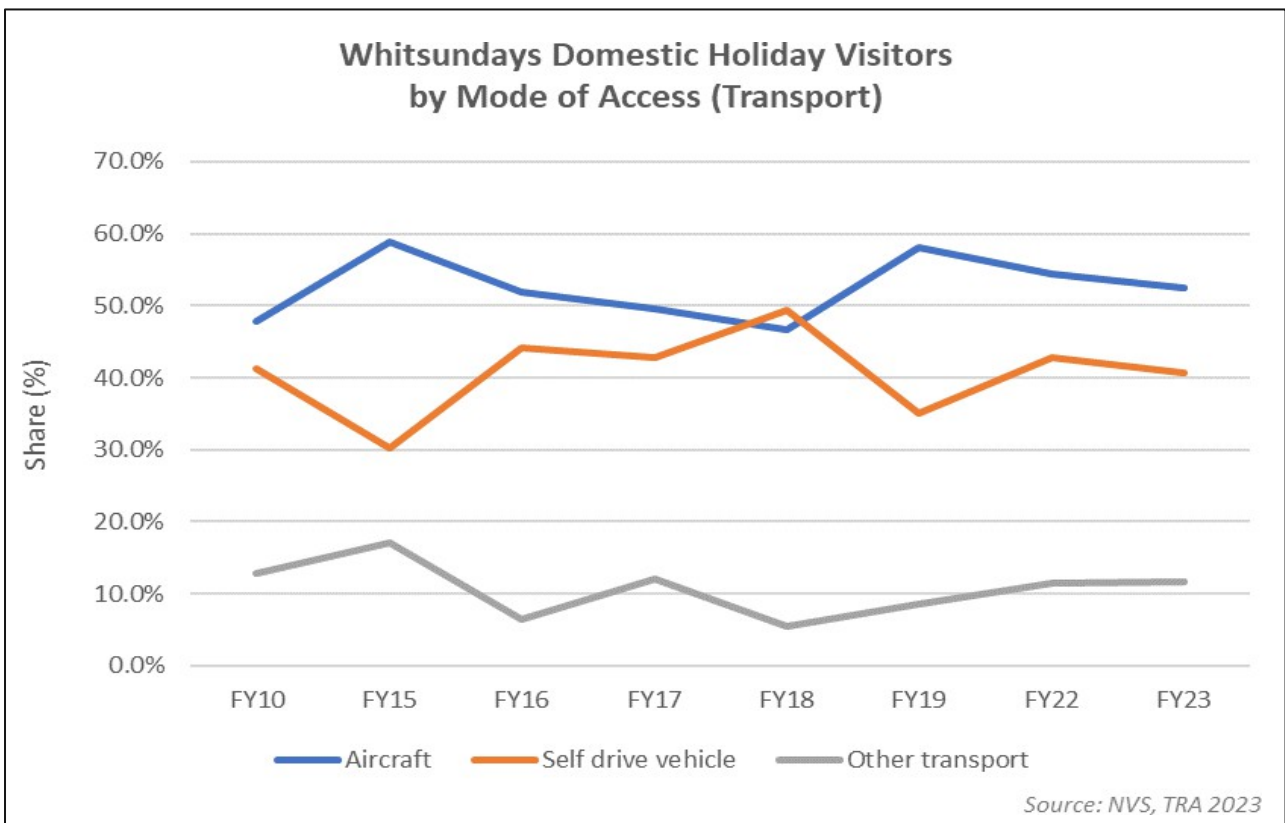


Figure 25: Whitsunday's domestic market mode of access.

Core Market (International)

6. International Backpacker

About: The International backpacker has historically been an important market for the Whitsundays region. Backpackers stay longer, spend more, and provide vital employment services across the region. While the International Visitor Statistics (Tourism Research Australia, 2023) has shown a downward turn in backpacker arrivals in the period from 2010-2019, their numbers are still significant, and this market provide an important stream of yield and employment for the region.

Considerations: With the increased cost of living and reduction in the availability of backpacker dormitory accommodation across the region it will be a challenge for this market to be adequately maintained. A further review of the market needs to be undertaken to understand the modern backpacker's country of origin, reasons for travel, intended length of stay, and challenges they face before arriving/while in the region.

7. International Traveller

About: The international travel market took a significant hit during the COVID-19 pandemic when borders were closed, and travel was restricted. The motivations for travelling to the Whitsundays are varied however it's likely the region's position as the 'Heart of the Great Barrier Reef', and its iconic landmarks of Heart Reef and Whitehaven Beach, provided a major drawcard. Western European countries (including Germany, Netherlands, Switzerland), the United Kingdom, and the United States of America are key international markets for the Whitsundays. China saw huge growth both in Australia and in the Whitsundays pre-pandemic and has become a key market, however, according to the Tourism Research Australia³³ due to various uncertainties it will likely be slower to grow this market back.

Considerations: As the international market begins to build back it's important that Tourism Whitsundays continues to work with Tourism and Events Queensland to build awareness of the region in key international markets. Working with the Whitsunday Regional Council to establish international flight networks is also mission critical. Awareness and positioning in international markets is especially important in the lead up to the 2032 summer Olympic and Paralympic Games. They region is a prime 'must-do' holiday destination pre- and post-Olympic games.

Secondary markets

8. Grey Nomad

About: Grey Nomads are a segment of the Empty Nester market that arrive to the Whitsundays via self-drive vehicle that also encompasses their accommodation (caravan, motorhome, RV or campervan). Grey Nomads are less likely to be bound by time constraints, so they can stay longer in the region, and due to their interests and lack of reliance on

³³ Tourism Research Australia Tourism Forecasts for Australia 2022 - <https://www.tra.gov.au/en/economic-analysis/tourism-forecasts/tourism-forecasts-for-australia-2022-2027>

building-based accommodation providers (hotels/motels/resorts) they are able to explore further and promote regional dispersion.

Considerations: Grey Nomads provide a significant portion of tourism to the less trafficked areas of the region (Bowen, Collinsville, Proserpine). They are also a market segment that have the time and resources to stay longer and explore further. To develop and maintain this market, investment in infrastructure upgrades including accessibility and roads (state government), RV parks and camping facilities, signage, and additional parking in Airlie Beach is recommended, along with land-based activities to encourage increased length of stay.

9. Fishing

About: With an abundance of fishing opportunities across the region including coastal, deep sea, fresh and saltwater creeks and estuaries, rivers, and the well-stocked Lake Proserpine, the Whitsundays draws keen fishers from all over. Proserpine is known as the mecca for barramundi in Australia which contributes to the region's reputation as a fishing destination.

Considerations: Whether fishing is the primary purpose of the trip, or a trip add-on activity, fishing opportunities (both bookable and free of charge) should be promoted through the Whitsundays' marketing content.

10. Events (food, art, culture)

About: The Whitsundays has a varied and robust event calendar with events that includes the Airlie Beach Festival of Music, Great Barrier Reef Festival, and the White on Whitehaven dining event, all of which attract significant visitation to the region. Travellers from outside of the region who specifically travel to attend an event are an important market consideration as they contribute and distribute new economic benefits across the community.

Considerations: Collaboration between Tourism Whitsundays and the Whitsunday Regional Council on a refreshed major events strategy should focus on encouraging and developing a variety of events, that span across the region. Consideration needs to be given to the cost and availability of accommodation and services during the event period to ensure that the event visitors are experiencing value on the ground.

11. Business events

About: While not a key market for the Whitsundays, business events are still an important driver for visitation to the region, and especially to the islands.

Considerations: As identified in the previous Tourism Whitsundays Marketing Strategy (2019) the region should play at a brand-level to build reputation. The existing webpage and comprehensive events compendium are great resources that could be further strengthened by case-studies from past event organisers that represent ideal events, and further marketing through social media channels to encourage consideration as a business events destination. Investment in infrastructure (accommodation, conference facilities) is required to further to grow this market on the mainland.

12. Endurance events

About: With over five large endurance events in the region, visitors are drawn to the region to specifically participate in these events. Endurance event markets are strong enough to stand on their own to attract visitation, however, they also tie into the market trends of wellness, which has shifted to incorporate visitors wanting to maintain their healthy habits while on holidays.

Considerations: While the region has an established recurring visitor market who arrive in the region to attend these events, further research should be undertaken to determine emerging segments. Understanding potential shifts in this market is essential to ensuring that marketing efforts are refined and reaching the correct audiences.

13. Romance/big life events (product)

About: This product market primarily focuses on couples celebrating significant milestones and life events such as honeymoons, babymoons, engagement trips, weddings, anniversaries, and romantic getaways. Travelers in this segment typically seek experiences that enhance the romantic or celebratory nature of their special occasions. The market may include not only couples but also groups of friends and family accompanying them on these trips to share their celebrations.

Considerations: The region may be better positioned to reach this market in the wake of the increased domestic visitation over the pandemic. Continuation of efforts to raise awareness of the region among this market is recommended.

Emerging Markets/Markets to Watch:

14. India

About: According to Tourism Research Australia (TRA) data, in the year ending June 2023, Indian visitors to Australia totalled 363,000 trips (up 4% from 2019) and spent \$1.4 billion (up 14% from 2019). The India market is currently ranked fourth in Australia's top five international markets. The most common purpose for visiting Australia was visiting friends and relatives (VFR) at 54.6%, with next highest purpose for visiting was holidaying at 17%³⁴. Understanding the purpose for visiting Australia could provide opportunities to reach the Indian market.

Considerations: While a holiday to Queensland is not the primary reason for visiting Australia, reaching Indian residents through marketing campaigns could provide a reason for families to holiday together in the Whitsundays when their friends and relatives come to visit.

15. Direct access markets:

About and considerations: As new flight paths open between the Whitsundays and locations around Australia, so too will new domestic markets. Research to understand these markets should be undertaken to ensure that marketing activities are effective and successful.

16. Luxury

About: According to data from TRA (2019)³⁵, approximately 13% of domestic overnight visitors fell into the luxury category with a total national spend of \$28.1 billion. New South Wales at 32%, and Victoria at 25% are the two states that show highest luxury visitation, which also coincides with the data that shows that business is the largest driver of luxury travel at 44%.

Considerations: Further research is recommended to understand the Luxury market drivers that are relevant to the Whitsundays region. If the products and experiences available in the region align to the needs of other drivers, then further marketing efforts should be considered.

17. Superyachts

About: Superyacht tourism has the potential to contribute over \$2 billion to the Queensland economy³⁶. The Whitsundays region is in a great position to accommodate this luxury visitor market, both with the current infrastructure, and the planned infrastructure upgrades.

Considerations: Further research into the requirements of this market should be undertaken to determine short-mid and long-term strategic requirements and opportunities in the lead up to the 2032 Olympic games in Brisbane. Collaboration and engagement with the State government should be undertaken to identify and access the resources required to accommodate and grow this market. Collaboration with local government should be undertaken to ensure on-the-ground facilities and experiences exceed the expectations of this high spending market.

18. Sustainability

About: Travellers are becoming more aware of the impacts their decisions have on the climate, environment, and society and these issues are shaping traveller trends. According to booking.com's sustainable travel data³⁷, *"81% of travellers confirm that sustainable travel is important to them, with 50% saying that recent news about climate change has influenced them to make more sustainable travel choices. 59% of travellers say they want to leave the places they visit better than when they arrived."* This shift in traveller values and trends has the potential to not only impact the long-term appeal of destinations around the world, but also provide significant opportunities for competitive advantage.

Considerations: The Whitsundays region is in a great position to take advantage of the great initiatives and work that the region has been doing through the Healthy Heart project, and various landscape restoration projects. The region should continue to grow and develop these projects, achieve Sustainable Destination Certification, and aim to become global leaders in sustainable and eco-tourism. It's important that all the good work that the

³⁵ Tourism Research Australia Luxury Travel (2019)

³⁶ Queensland Superyacht Strategy 2018-2028

³⁷ Booking.com- Climate, Community and Choice: Booking.com Reveals the Trends Shaping Sustainable Travel in 2022: <https://globalnews.booking.com/climate-community-and-choice-bookingcom-reveals-the-trends-shaping-sustainable-travel-in-2022/>

Whitsundays tourism industry is doing is communicated across the community, and to domestic and international visitors. The Whitsundays has the potential to become *the* sustainable holiday destination in Australia.

19. Adventure

About: The adventure tourism market sees people travelling for the purpose of outdoor and adventurous experiences. It can encompass activities such as diving, hiking, climbing, mountain biking and kayaking, right through to adrenaline-based activities like sky diving, jet skiing, and wake boarding.

Considerations: With unrestricted access to the Great Barrier Reef, 74 islands, beaches, and state parks, along with a plethora of adventure-based activities on offer, the Whitsundays is in a prime position to capture this market. An experience development strategy will enable the region to review and understand its current adventure product offerings, identify strengths and opportunities for the development of new adventure products and experiences, and ways to package and market products to ensure it is reaching the intended market.

Appendix 3 - SWOT Analysis

STRENGTHS	LIMITATIONS
<ul style="list-style-type: none"> • Proximity and accessibility of the world heritage listed Great Barrier Reef and the 74 Whitsunday Islands • Home to several iconic natural landmarks (Heart Reef/ Whitehaven Beach) • Two well established and well serviced aviation facilities • Very strong brand with high brand accessibility, awareness, and performance • Modernised marina facilities that service the industry, Islands, and cruise ships • Well known and well-established events calendar (Hamilton Island Race Week, Airlie Music Festival) • Strong tourism industry with high regional employment contributions • A council that understands the importance of tourism and supports and invests in the tourism industry • A strong foundation in sustainability and ecotourism with the creation of the Whitsundays Climate Innovation Hub, and widely established Ecotourism Australia certifications • Well established drive itineraries with supporting information and resources to encourage dispersion • Incredible and unique fishing opportunities (tours and self-guided) • Heritage towns with historical education products (Collinsville) 	<ul style="list-style-type: none"> • Lack of year-round land-based activities • Availability and affordability of staff housing • High costs of accommodation deterring visitors and impacting the region’s reputation • Accessibility/ road infrastructure • Inadequate mainland convention/event facilities for MICE event markets • No clear drive market strategy • No clear investment prospectus to encourage investment • Availability of public parking • Island resorts in disrepair without clear investment or plans for revitalisation • Changing visitor mix with youth and adventure market softening • Media conveying negative perceptions around the health of the Great Barrier Reef • Clarity and understanding around the significant economic benefits and impact of the tourism industry • Tired and outdated tourism infrastructure
OPPORTUNITIES	CHALLENGES
<ul style="list-style-type: none"> • Additional funding for destination marketing and management activities 	<ul style="list-style-type: none"> • Adequate funding for destination marketing and management activities

<ul style="list-style-type: none"> • Pipeline for investment through the development of an investment prospectus • Pipeline of public and private investment (Branded 5+ star mainland accommodation, events and convention facilities, island resorts, new accommodation) • Partnership agreements to foster collaboration and understanding of common goals • New regional major events and festivals strategy • New mainland nature and ecotourism experiences (Skyway, Heart of the Reef Discovery Centre,) • Development of local food beverage trails and festivals (Agritourism) • Indigenous tourism partnerships and products • Aviation access and drive market strategy • Themed tourism road loops and signage • Working with state and federal governments to de-risk investment in the region • Positioning for the 2032 Olympic Games • Establish a unified approach to customer service • Research, citizen science, and education • Developing and positioning of the region as a fully sustainable tourism/ ecotourism destination • Further development of hiking and mountain biking trails throughout the region • Historical township product 	<ul style="list-style-type: none"> • Actual accommodation/ housing availability • Barriers to investment and development approvals for major tourism projects • Staffing and accommodation availability and affordability • Focus and prioritisation on key markets • High costs / high risks deterring investment in the region • Increasing costs of operations: fuel costs/ insurance costs • Price of products and services in the region • Sustainable tourism including decarbonisation and net zero targets • Tourism priority roads network/signage • Impacts of short-term rentals (Airbnb, Stayz etc.) • International outbound competition • Lack of clearly defined roles and responsibilities • Resources required to develop agritourism experiences • Strained relationships impacting ability of members to act impartially for a greater good • Community understanding and support of development projects (e.g. court case Re: Port of Airlie development) • Risk and resilience: Climate change, extreme weather events, and coral bleaching • Managing the return of cruise ships • Managing the return of international aviation routes
---	---

Analysis of Key SWOT Elements

Key Strengths	Analysis
Pristine and abundant natural environment	Located in the heart of the Great Barrier Reef, the Whitsundays region is known for its pristine and breathtaking natural environments that are unmatched by most other destinations globally.
Proximity and accessibility of the world heritage listed Great Barrier Reef and the 74 Whitsunday Islands.	From snorkelling the reef from the sandy beaches of Bowen, to guided snorkelling and sailing trips, the region boasts a location that is highly accessible to the Great Barrier Reef, and the 74 Islands of the Whitsundays. This proximity to the reef and Islands forms a huge drawcard for key visitor markets.
Two well established and well serviced aviation facilities.	There are two key aviation access points that facilitate easy access to the region: the Hamilton Island airport, and the Whitsunday Coast Airport in Proserpine. Investment and development in the Whitsunday Coast Airport over the past few years has seen an increase to 5 airline carriers servicing the region, from 7 direct locations around Australia.
Well known and well-established events calendar.	From the globally recognized Hamilton Island Race Week to the Airlie Beach Festival of Music, the region boasts large, well-established events that draw visitors from all over to the globe. These long running events appeal to varied audiences and bring an influx of tourism to the region annually.

<p>A council that understands the importance of tourism and supports and invests in the tourism industry.</p>	<p>One of the goals listed in the WRC Regional Economic Development Strategy is listed as <i>“Raise the profile of the region as a business destination in order to attract investment. Market the visitor destination further to support investment and jobs through attracting more visitors, visitor expenditure and increasing yield”</i>. With investment in the Whitsunday Coast Airport, Shute Harbour Marine Terminal, and the development of the festival and events strategy, the Whitsunday Regional Council demonstrates their commitment to building the tourism industry.</p>
<p>A strong foundation in sustainability and ecotourism.</p>	<p>The Region has worked hard to establish a strong sustainability and ecotourism foundation. With over 45 tourism businesses now signed up to the Whitsundays Healthy Heart project, and reef and sea grass restoration projects under way, the Whitsundays Region is recognised for their work towards a cleaner, more sustainable tourism industry.</p>

Key Opportunities	Analysis
<p>Development of a comprehensive regional investment prospectus.</p>	<p>Through conversations with stakeholders, it is evident that there are a few large barriers that deter investment and development in the region. The development of a strong, balanced, data-based investment prospectus with support from local and state government will reduce barriers for entry, and ultimately facilitate the development of new accommodation and tourism infrastructure and product offerings.</p>
<p>Decarbonisation, sustainability, and ecotourism.</p>	<p>Trends and behaviours demonstrate that travellers are becoming more aware of the environmental and social impacts of their travels. Subsequently, this is reflected in their decision-making patterns as they are increasingly searching for and choosing sustainable options. The region has a well-established foundation in sustainability with the Healthy Heart project, and various reef and sea grass restoration projects. The Whitsundays is well positioned to build on the work that is already being done to become a leading destination in decarbonisation, sustainability, and ecotourism, ultimately creating a competitive advantage.</p>
<p>Research, citizen science and education.</p>	<p>As the entry way to the Great Barrier Reef, the Whitsundays is a prime location for reef research and education facility. As visitors become more interested in regenerative efforts, and leaving places they visit better than they found them, there is an opportunity to further develop citizen science programs to create an authentic and meaningful connection with visitors that will positively impact their experiences while in region. Clear mapping of opportunities for education and citizen science not only elevates the visitor experiences, but also contributes to the Whitsundays’ sustainability efforts.</p>
<p>2032 Summer Olympics</p>	<p>While the Olympic Games will be taking place in Brisbane in 2032, the Whitsundays region is well positioned to establish the region as a</p>

	must-do holiday destination to visit before or after the Olympic Games.
Review and develop agritourism opportunities.	The National Agritourism Strategy Framework details the value of an established agritourism product offering. The region is well positioned to develop an agritourism trail that increases yield, encourages dispersion among the region, and provides farming and agricultural operators the opportunity to diversify.
Become a leader in customer service delivery.	To help maintain the exceptional levels of growth the region experienced during the pandemic, it's important that delivery on the ground is meeting the needs and expectations of visitors. The widespread implementation of the Customer Service Heroes program would elevate the visitor experience and help deliver value on the ground, ensuring that the region maintains competitiveness in the face of changing post-COVID market demands.

Key Challenges	Analysis
Funding availability for tourism marketing and development	With a softening domestic market as travellers look to outbound tourism, to meet the state Government's targets for 2032 it is essential that the region focuses their efforts on attracting inbound international tourists. Due to the highly competitive and saturated nature of tourism marketing, the region will need to strengthen and elevate their marketing efforts to stand out from the crowd. A reduced budget for tourism impacts the ability of the region to meet the needs of their visitor, and effectively reach their key markets and achieve necessary booking conversions.
Investment and development limitations.	Limitations for investment and development can be viewed from two high-level perspectives: 1) red tape and barriers to development (both market and community barriers) 2) high-risk and high costs acting as a deterrent. While not all barriers can be removed, focused and strategic efforts are required to support the projects currently in the works, and pave the way to de-risk and attract new investment and development.
Adequate mainland-based attractions and activities to service visitors and community.	The region has limited mainland-based attractions for year-round visitation. The proposed development of the Whitsunday Skyway cable car, and Heart of the Reef Discovery Centre will help to rectify this issue, however the ongoing challenges faced in development is poses a challenge to the growth of the region.
Sufficient Accommodation availability to meet customer demands and support growth.	Lack of investment in new purpose-built tourism accommodation in the region provides challenges and restrictions to the operations, and growth of the tourism industry. Accommodation shortages and quality, both on the mainland and on the islands, need to be addressed if the region is to meet the required growth targets.

<p>Climate change, coral bleaching, and major weather events.</p>	<p>The changing climate is causing significant issues for the Whitsundays region. Coral bleaching, natural disasters, and extreme weather events create threats to visitor safety and confidence in the region. Responding to these challenges, preparing industry for natural disasters, communicating with guests for their safety, and decarbonisation of the tourism industry will play an important role moving forward.</p>
<p>Staff housing availability and affordability.</p>	<p>The ability to attract and retain staff poses a significant challenge to the industry due to the housing and cost of living crisis, and the reduction in affordable backpacker accommodation. This is an issue that is not unique to the region, however, needs to be addressed to maintain a strong workforce and vibrant community.</p>



Appendix 4 - Data Behind the Recommended Product Targets

Domestic Holiday Visitors										
Products	3 Yr Avg: 2008-2010		3 Yr Avg: 2017-2019			3 Yr Avg: 2021-2023			TARGETS	
	Share of	Share of	Growth	Share of	Share of	Growth	Share of	Share of	Share of	Share of
	Whitsundays	Queensland	08-10/17-19	Whitsundays	Queensland	17-19/21-23	Whitsundays	Queensland	Whitsundays	Queensland
	Intrastate		Intrastate			Intrastate				
Weekends (1-3n)	66.1%	3.4%	-5.8%	63.0%	2.5%	48.2%	56.0%	2.4%	50.0%	2.2%
Short Break (4-7n)	25.1%	3.9%	28.3%	32.6%	4.5%	149.2%	31.6%	5.0%	40.0%	7.0%
Holiday (8-14n)	8.2%	5.2%	-66.7%	2.8%	2.0%	440.0%	11.5%	7.7%	9.0%	7.0%
Travel (15+n)	0.0%	0.0%	0.0%	1.7%	4.8%	33.3%	0.9%	4.0%	1.0%	4.0%
Total Intrastate	55.1%			52.0%			66.5%		50.0%	
	Interstate		Interstate			Interstate				
Weekends (1-3n)	22.1%	4.0%	51.5%	29.9%	4.3%	-32.0%	17.5%	3.3%	20.0%	3.0%
Short Break (4-7n)	59.7%	6.6%	3.4%	55.1%	6.6%	19.6%	67.2%	9.9%	68.0%	8.0%
Holiday (8-14n)	15.4%	4.2%	-4.3%	13.2%	4.1%	18.2%	10.1%	4.4%	10.0%	5.0%
Travel (15+n)	2.7%	3.0%	-50.0%	1.2%	1.5%	200.0%	4.9%	9.1%	2.0%	2.0%
Total Interstate	44.9%			48.0%			33.5%		50.0%	
	Total		Total			Total				
Weekends (1-3n)	46.7%	3.5%	5.8%	47.1%	2.9%	23.8%	35.5%	2.6%	35.0%	2.6%
Short Break (4-7n)	40.7%	5.3%	27.5%	43.1%	5.5%	23.1%	50.7%	7.7%	54.0%	7.5%
Holiday (8-14n)	11.4%	4.6%	18.9%	8.0%	3.5%	33.6%	10.8%	5.6%	9.5%	6.0%
Travel (15+n)	1.2%	2.0%	27.9%	1.4%	2.6%	18.9%	3.2%	8.3%	1.5%	3.0%
Total Whitsundays										

Note: "Growth" data based on actual visitor numbers, not market share.

Source: NVS, TRA, 2023

Appendix 5 - Data Behind the Recommended Market Targets

Domestic Holiday Visitors											
Markets	3 Yr Avg: 2008-2010		3 Yr Avg: 2017-2019			3 Yr Avg: 2021-2023			TARGETS - 2028		
	Share of Whitsundays	Share of Queensland	Growth 08-10/17-19	Share of Whitsundays	Share of Queensland	Growth 17-19/21-23	Share of Whitsundays	Share of Queensland	Share of Whitsundays	Share of Queensland	
	Intrastate		Intrastate			Intrastate			Intrastate		
Young SINKs/DINKs	14.2%	3.5%	-19.2%	11.6%	2.9%	100.0%	12.1%	5.9%	10.0%	3.0%	
Older SINKs/DINKs	25.7%	4.9%	14.9%	29.8%	3.6%	74.1%	27.1%	4.8%	30.0%	5.0%	
Younger Family	9.3%	2.1%	23.5%	11.6%	2.8%	109.5%	12.7%	5.7%	12.0%	3.0%	
Older Family	24.6%	3.8%	-8.9%	22.7%	3.0%	92.7%	22.8%	4.5%	25.0%	4.0%	
Empty Nesters	26.2%	3.8%	-8.3%	24.3%	2.6%	100.0%	25.4%	4.3%	23.0%	4.0%	
Total Intrastate	55.1%			52.0%			66.5%				
	Interstate		Interstate			Interstate			Interstate		
Young SINKs/DINKs	8.7%	3.5%	-7.7%	7.2%	3.9%	50.0%	10.2%	6.6%	5.0%	3.0%	
Older SINKs/DINKs	20.1%	5.7%	66.7%	29.9%	7.0%	4.0%	29.5%	7.7%	37.0%	8.0%	
Younger Family	18.1%	6.8%	-33.3%	10.8%	5.1%	27.8%	13.1%	10.0%	14.0%	7.0%	
Older Family	26.2%	6.3%	0.0%	23.4%	5.8%	-17.9%	18.2%	5.6%	20.0%	6.0%	
Empty Nesters	26.8%	5.8%	17.5%	28.1%	5.4%	10.6%	29.5%	7.7%	24.0%	6.0%	
Total Interstate	44.9%			48.0%			33.5%				
	Total		Total			Total			Total		
Young SINKs/DINKs	11.7%	3.5%	-17.9%	9.2%	3.1%	84.4%	11.3%	6.0%	7.5%	3.0%	
Older SINKs/DINKs	23.2%	5.2%	35.1%	29.9%	4.7%	40.4%	28.0%	5.5%	33.5%	6.5%	
Younger Family	13.3%	3.7%	-9.1%	11.5%	3.6%	65.0%	12.6%	6.6%	13.0%	5.0%	
Older Family	25.6%	4.8%	-4.7%	23.3%	4.0%	37.0%	21.3%	4.8%	22.5%	5.0%	
Empty Nesters	26.5%	4.5%	2.3%	25.9%	3.5%	56.7%	27.0%	5.2%	23.5%	5.0%	
Total Whitsundays											

Note: "Growth" data based on actual visitor numbers, not market share.

Source: NVS, TRA, 2023

Appendix 6 - Data Behind the Recommended International Targets

International Holiday Visitors								
Markets	3 Yr Avg: 2008-2010			3 Yr Avg: 2017-2019			TARGET- 2028 ³	
	Share of	Share of		Growth	Share of	Share of	Share of	Share of
	Whitsundays	Australia		08-10/17-19	Whitsundays	Australia	Whitsundays	Australia
New Zealand	2.9%	1.4%		63.6%	4.5%	1.8%	5.0%	2.0%
Japan	4.4%	2.5%		3.7%	4.3%	2.7%	4.0%	3.0%
China	0.4%	0.4%		2148.0%	9.1%	2.4%	9.0%	3.0%
Other Asia	2.4%	0.8%		88.6%	4.2%	0.7%	4.0%	3.0%
Total Eastern	10.2%	1.3%		132.0%	22.0%	1.5%	23.0%	3.0%
United States of America	5.5%	5.6%		61.3%	8.3%	4.4%	9.0%	5.5%
Canada	6.1%	18.8%		-23.0%	4.3%	10.8%	5.0%	12.0%
United Kingdom	29.3%	18.4%		-28.0%	19.7%	14.6%	22.0%	20.0%
Germany	14.5%	26.8%		10.0%	14.9%	21.7%	18.0%	25.0%
Scandinavia	5.9%	23.3%		-5.5%	5.2%	17.3%	7.5%	25.0%
France	4.2%	15.0%		33.7%	5.2%	13.9%	7.5%	15.0%
Italy	1.9%	11.5%		30.9%	2.4%	13.4%	4.0%	15.0%
Netherlands	5.4%	33.1%		-24.8%	3.8%	23.9%	5.0%	35.0%
Switzerland	3.2%	21.5%		25.3%	3.7%	20.4%	4.0%	25.0%
Other Europe	10.6%	20.7%		-28.3%	7.1%	13.0%	10.0%	20.0%
Other Countries	3.0%	4.2%		19.4%	3.4%	3.4%	3.0%	5.0%
Total Western (excl NZ)	89.8%	15.7%		-6.7%	78.0%	11.1%	77.0%	20.0%
Total				7.4%				

Note: "Growth" data based on actual visitor numbers, not market share.

Source: IVS, TRA

Appendix 7 - Key Strategic Plans

1. Local Regional Economic Development Strategy

Whitsunday Regional Council (WRC) Economic Development Strategy outlines short-medium term strategies that promote long-term, sustainable growth to 2025 and beyond.

Based on the identified strengths and growth opportunities, the clear goal of the strategy is to deliver more investment and more jobs, as the pathway to securing the economic and environmental sustainability of the Whitsunday region.

Through generating investment outcomes new jobs will be created and delivered. However, without the lifestyle to support new families moving to the region, it will be difficult to fill the new jobs that will be created, which in turn presents challenges to recruiting the investment. While the goal is to deliver more investment and jobs, protecting and enhancing local lifestyle will be important to ensure sustainable growth over time.

The vision highlights multiple growth opportunities within the region's key industries, including agriculture, tourism, aquaculture, and space launch. The plan outlines four key strategy areas below, and subsequent priority actions that will guide the council's actions over the next five years.

1. Advocacy and infrastructure
2. Marketing and promotion
3. Business retention and expansion
4. Planning

The strategy highlights that a multifaceted approach is critical as accommodation availability, growing businesses, and increasing population growth put additional demand and strain on existing resources and infrastructure around the region.

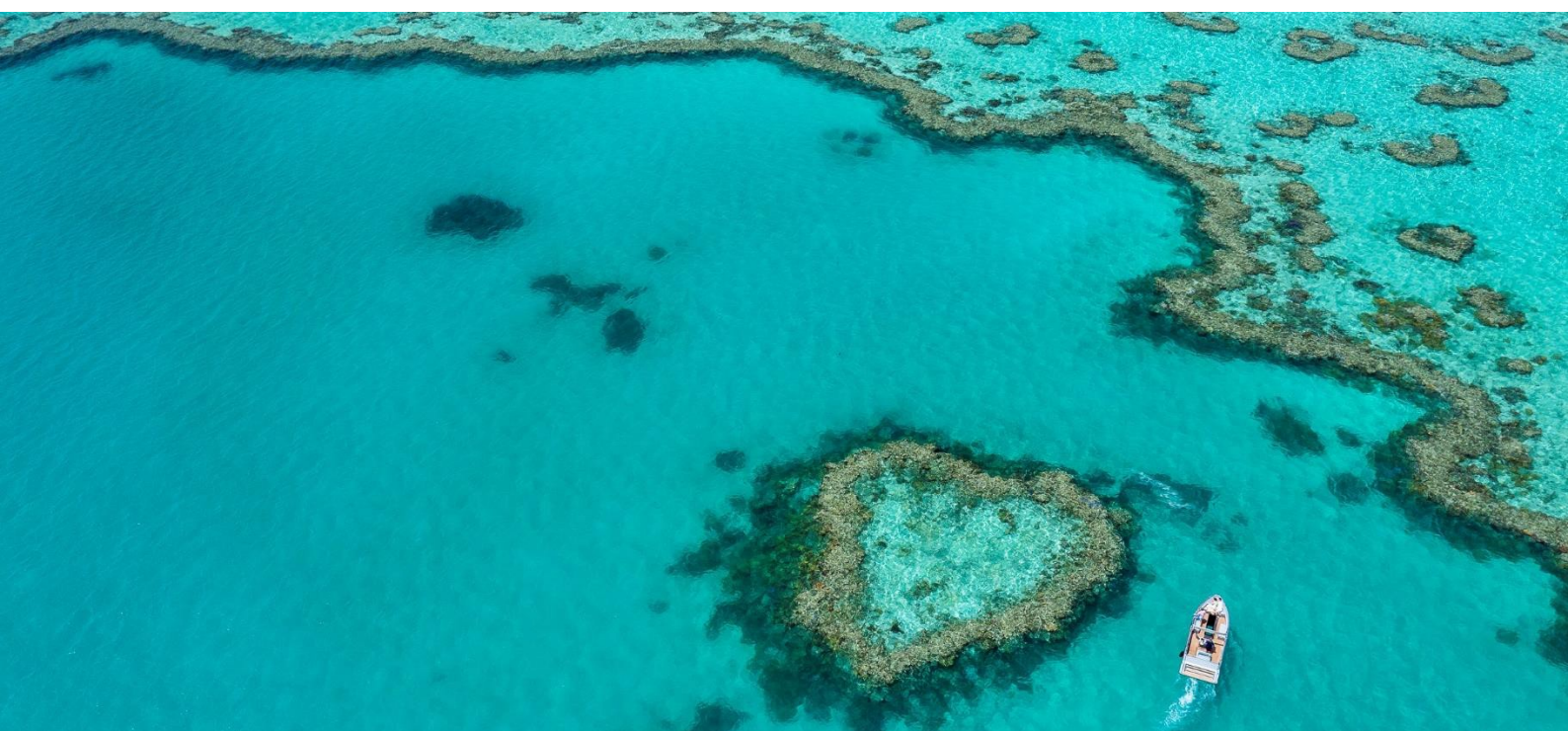
The document acknowledges the role played by the WRC and the economic significance of tourism within the region. Continued collaboration between the Whitsunday Regional Council, Tourism Whitsundays, and local operators is critical for ongoing development and for the realisation of investment opportunities within the industry.



Economic Development Strategy: Strategic Pillars

Economic Pillar	Long-Term Objectives	Enabling Strategies
Advocacy and Infrastructure	Advocate for the implementation of the catalytic projects and maximise opportunities with Council owned assets to secure investment and create jobs.	<ul style="list-style-type: none"> ✓ Promote catalytic projects to Government ✓ Lobby for education and healthcare facilities ✓ Develop the Whitsunday Freight Hub and Shute Harbour Marine Terminal
Marketing and Promotion	Raise the profile of the region as a business destination in order to attract investment. Market the visitor destination further to support investment and jobs through attracting more visitors, visitor expenditure and increasing yield.	<ul style="list-style-type: none"> ✓ Promote and market the region for investment ✓ Facilitate investment into the region ✓ Promote and market the region for tourism
Business Retention & Expansion	Generate investment and job outcomes through building local supply chains and local businesses expanding.	<ul style="list-style-type: none"> ✓ Support local business networks ✓ Engage with key industries and businesses to develop supply chains and value adding opportunities
Planning	Securing investment that produces jobs.	<ul style="list-style-type: none"> ✓ Support and encourage development and redevelopment opportunities

Figure 26: Whitsunday Regional Council Strategic Pillars. Source: WRC 2022.



2. Queensland State Government Strategic Tourism Plan

The current State strategic plan, *Towards Tourism 2032: Transforming Queensland's Visitor Economy to Welcome the World*, provides the vision for Queensland to become Australia's destination of choice for domestic and global visitors seeking the world's best experience by 2032. The mission is to encourage repeat visitation by remaining 'cutting-edge relevant' – continuously reimagining and reinventing the State's offering for the benefit of visitors, communities, and the environment.

An ambitious industry target has been set across the State – \$34 billion in overnight visitor expenditure per annum by 2027 and \$44 billion by 2032. Ten identified areas of opportunity have been established to deliver the vision and increase visitor expenditure towards 2032. These actions are all relevant to the DMP and include:

1. Reimagine our coast beach and island offering
2. Enhance our appeal to families, couples, and students
3. Deliver tech-wonderment
4. Create more touring opportunities
5. Own tropical and marine adventure
6. Become a regenerative tourism leader
7. Refresh and develop our places to stay
8. Hero authentic culture, including via new venues
9. Visitor-first mindset
10. Enabled via sustainable funding



Three key strategic directions have been identified in the strategy aimed to lead initiatives, drive change, and establish a framework and action plan that guides the pathway to success:

- **Demand, Supply and Connectivity:** Drive visitor demand, deliver transformational visitor experiences and ensure connectivity to and within Queensland.
- **Catalysts for Change:** Re-define Queensland's visitor experiences and re-position the state as a global destination of choice in line with the Queensland brand.
- **Enablers for Change:** Support service delivery, meet and exceed visitor expectations, adapt to emerging consumer needs, and drive the overall success of Queensland's visitor economy.

The Whitsundays is in prime position to contribute to all three strategic areas. The region is well positioned as the gateway to the world-heritage listed Great Barrier Reef and 74 tropical islands; is home to two iconic locations (Heart Reef and Whitehaven Beach); and boasts two regional airports, a recently refreshed marine terminal, and major highway access.

With a council that invests in major transport infrastructure, approaches climate change and risk management in a strategic way, and values and supports tourism, the Whitsundays has the incredible

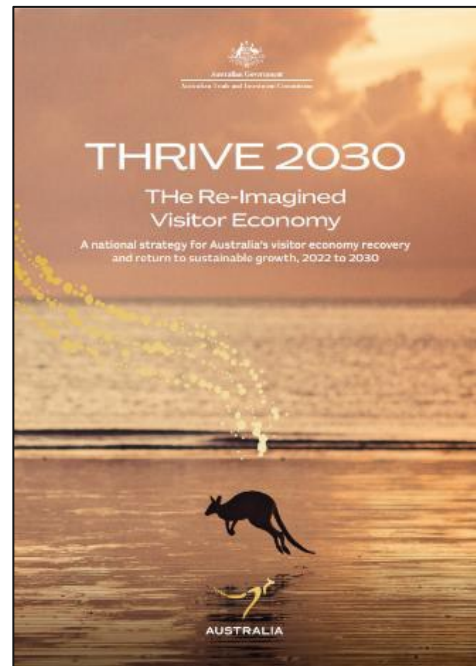
opportunity to position themselves as a global leader in ecotourism and destination decarbonisation and sustainability in lead up to the Brisbane 2032 Olympic and Paralympic Games.

3. Australia's National Government Strategic Tourism Plan

THRIVE 2030: The Re-Imagined Visitor Economy provides the national policy framework for tourism through to 2030. Broken into three phases; the Recovery Phase between 2022-2024 aims for visitor expenditure to reach pre-COVID-19 levels at \$166 billion, with \$70 billion of this from regional spend. By 2030, within the Accelerate Phase, the long-term goal is visitor expenditure to be worth \$230 billion, with \$100 billion regional spend.

Across the three key themes: collaborate, modernise, and diversify, there are seven policy priorities to grow the visitor economy:

1. Deliver success through comprehensive collaboration
2. Improve data and insights
3. Grow a secure and resilient workforce
4. Embrace leading-edge business practices
5. Enhance visitor infrastructure
6. Build markets and attract visitors
7. Grow unique and high-quality products, including Aboriginal and Torres Strait Islander experiences



The outcomes include more effective and beneficial industry collaboration, and improved research that will ultimately better support business decisions. The industry workforce will be upskilled to deliver high-quality experience that sustain high levels of visitor satisfaction with suitable infrastructure that meets the needs of visitors and communities. Diverse products and experiences will continually be delivered, allowing forecasted visitor levels and expenditure goals to be met.

The progression and outcomes of the Whitsundays Destination Management Plan will align with the overarching goals outlined in Thrive 2030. The DMP aims to build and delivery high-quality experiences and products, industry connectivity and collaboration, with development pathways for the workforce to build up the visitor economy in a post-pandemic world.

4. Queensland Regional Tourism Network – Guidance on the State Aspirational Target

The Queensland Regional Tourism Network (QRTN) commissioned Evolve Tourism and BDA Marketing Planning to create Destination Management Plan templates for each of the 13 Queensland Tourism Regions. The templates aim to create guidance for each region to meet the State Aspirational Target (2032).

At the time of finalising the draft of this DMP, the report mapping the Whitsundays' path to meet the state aspirational target was released and consideration should be given to the contents of the report.

Review of the report's data should be undertaken in consultation with tourism and Events Queensland, Tourism Whitsundays, and industry stakeholders to understand the significance of the outcomes and any recommendations put forward in the report.





EARTHCHECK

EarthCheck

5/189 Grey St
South Brisbane QLD 4101
P [+61 7 3924 4200](tel:+61739244200)
E info@earthcheck.org