



# DISCUSSION PAPER

## ISAAC TOURISM TRAILS



# 1 SETTING THE SCENE

## A. Purpose of the Isaac Tourism Trails Project

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DR Tourism has been contracted by both Isaac Regional Council and Mackay Isaac Tourism to carry out this important tourism project on behalf of the Isaac Region.

Despite the many fantastic tourism assets that the Isaac has - a persistent perception, particularly from those who live outside of the region - is that the Isaac is all about the mining sector. Of course, mining is and will remain crucial to the economic and social wellbeing of the region's residents for years to come, but both a challenge and opportunity exists to change people's perception of the region and awareness of the Isaac as a leisure tourism destination.



Specifically, this project addresses the following needs:

- Deliver a tourism strategy that provides direction for the broader region's tourism development on the back of several major trail networks - ensuring the region maximises its tourism potential;
- Assess the current visitor experience, accommodation and events offering, and determine where there are gaps and opportunities that need to be addressed;
- Develop an RV and Camping Strategic Plan;
- Develop a Prospecting and Fossicking Strategic Plan;
- Assess and provide recommendations on the region's current visitor information services model; and
- Provide recommendations on the future tourism development and marketing actions for each proposed tourism trail, and the wider tourism economy as a whole.

The project commenced in September 2022, and aims to conclude in March 2023.

SETTING THE SCENE (CONTINUED)

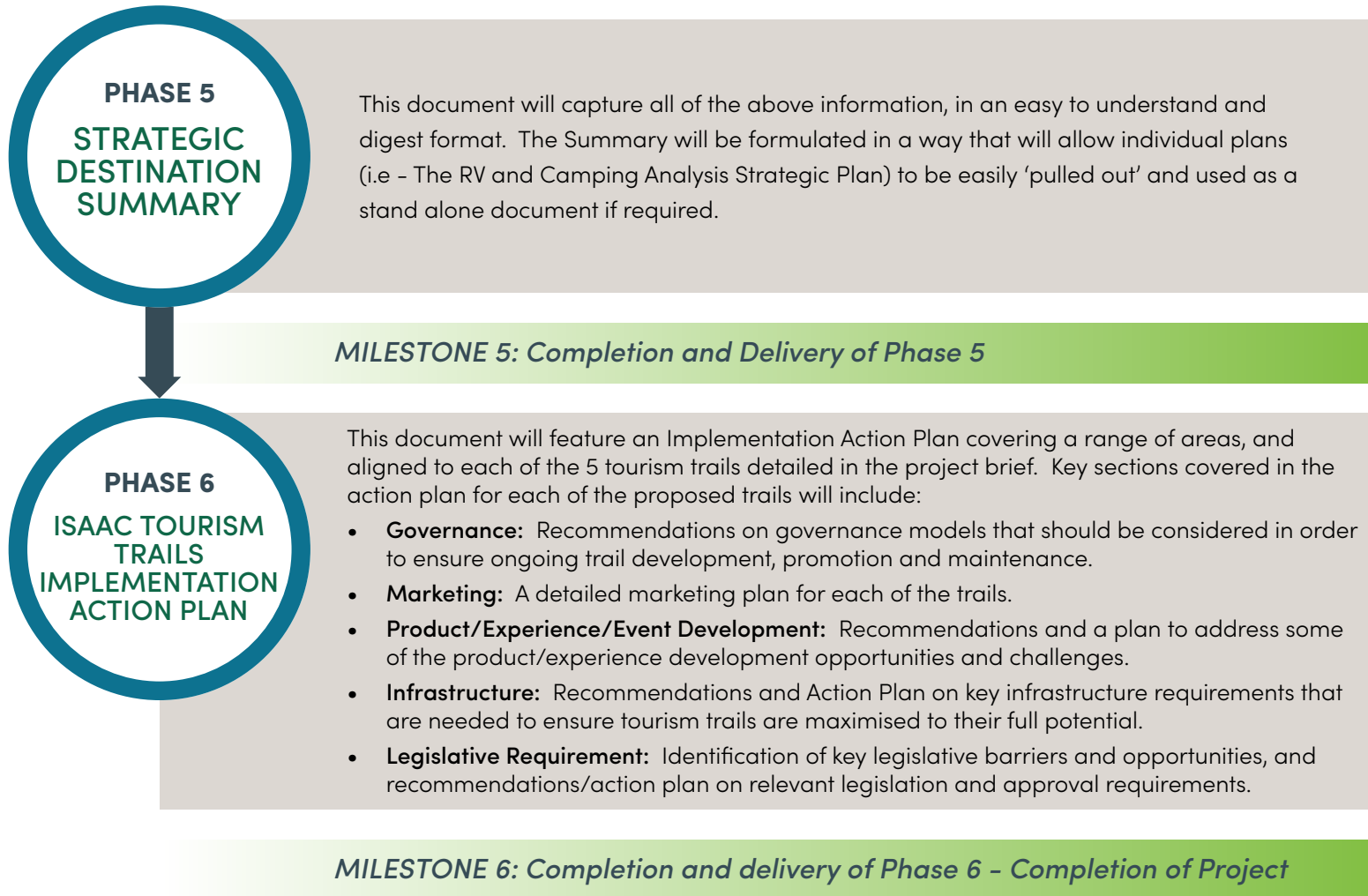
## B. Isaac Tourism Trails Project Methodology

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











# 2 THE ISAAC ECONOMY AND VISITOR MARKET

## A. About the Region

The Isaac Region is home to an estimated



resident population of **22,426** (ABS, year ending June 2021)

and is situated



**1,000km** & **900km**  
North-west of Brisbane South of Cairns

with the area forming part of the broader Mackay tourism region. The Isaac region is large and diverse,



covering close to **58,000** Square kilometres in size

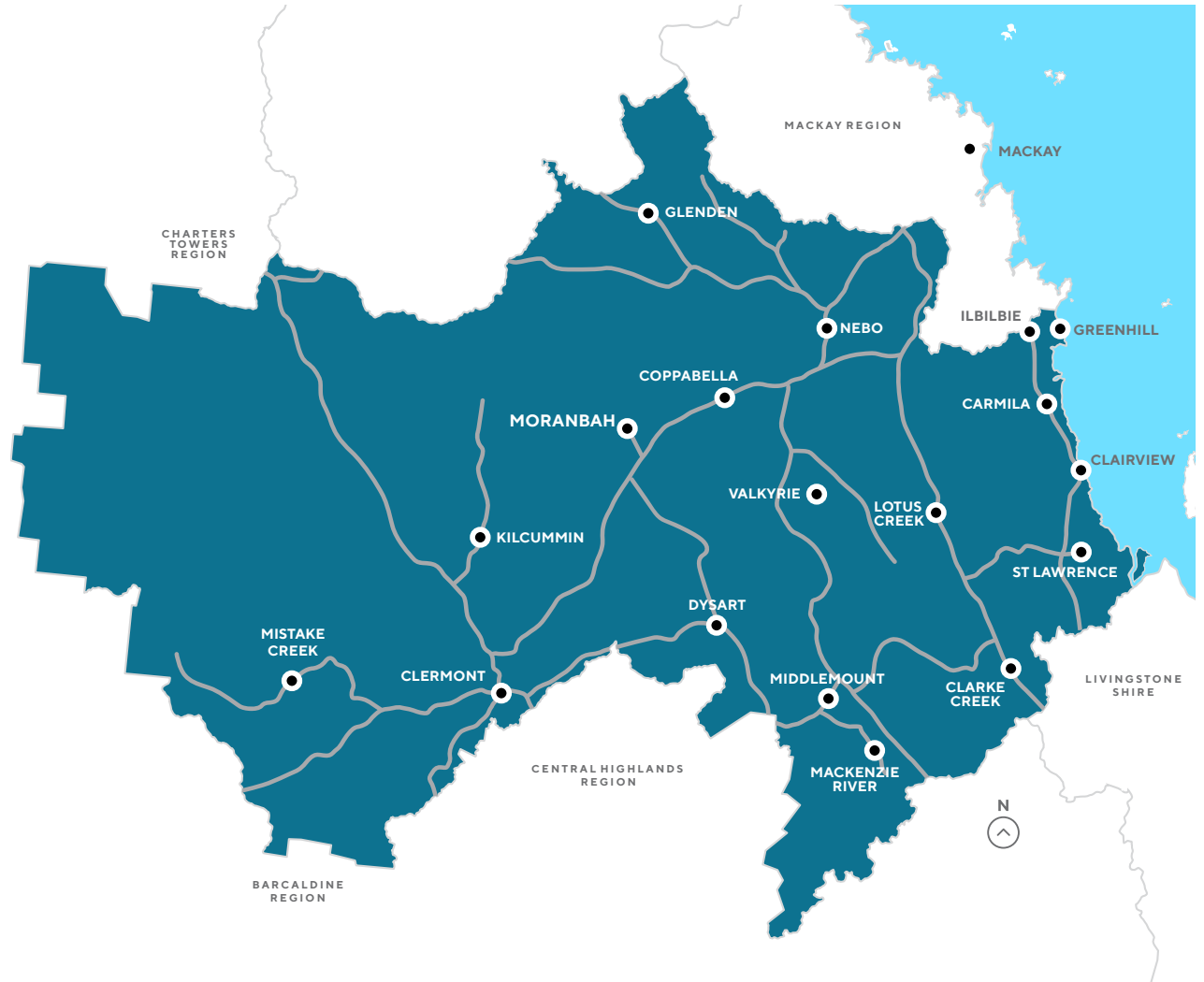
featuring a variety of natural and man made assets that contribute to a strong regional economy.

The region is home to seven regional towns, including Clermont, Dysart, Glenden, Middlemount, Moranbah, Nebo and St Lawrence. The Isaac region, whilst predominantly regarded as being an inland mining/resource sector heavy destination (Australia's largest coal deposit), also offers close to



**100km** of undeveloped coastline

and a significant agricultural sector.

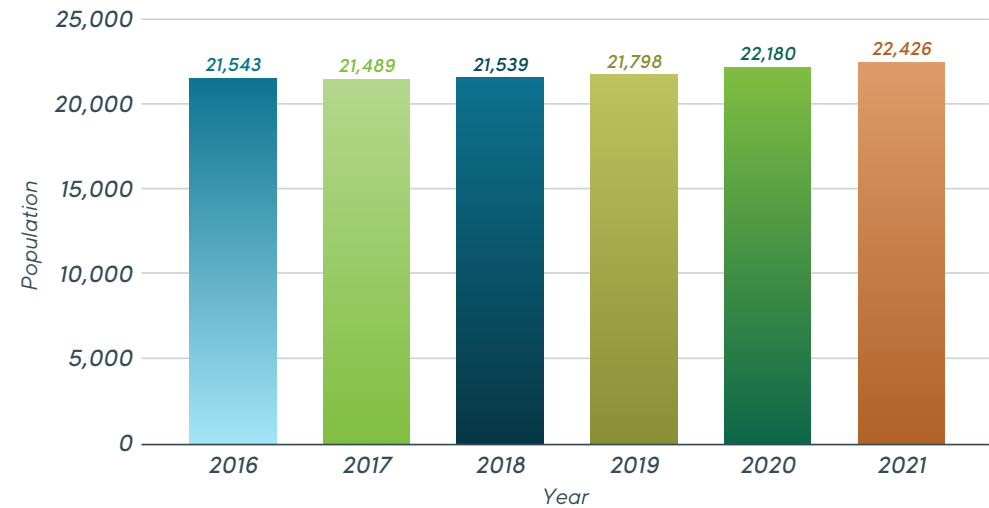


## ABOUT THE REGION (CONTINUED)

The Isaac region has experienced modest population growth between 2016 and 2021, with the population increasing by 883 residents over the 5 year period (4% growth) driven by the economic growth of the region through mining, agriculture and construction. The population's modest growth is also perhaps not a true reflection of the rate of which the region's economy has grown across the same 5 year timeframe, as a significant proportion of the region's workforce operates on a fly in, fly out (FIFO) basis, from metropolitan centres such as Brisbane. Given the FIFO workforce, it is important to note the size of the Isaac's non resident population, which as of the year ending 2021 sat at 12,080. This is in fact a slight decrease of 5% in comparison to the previous year (12,770).

Whilst the region's population is still experiencing some growth, it is reliant on a number of services that are provided by neighbouring LGA's, in particular Mackay. With the largest population base and being strategically situated on the Bruce Highway, Mackay is the primary service centre in the region. The CBD of Mackay is situated just over 2 hours drive from Moranbah, and is home to the broader region's specialist hospital services, and a variety of other necessary services.

### Population Growth - Isaac Region



## THE ISAAC ECONOMY (CONTINUED)

### B. The Isaac Economy

#### i. ECONOMIC OUTPUT

The Isaac Region supports approximately 21,462 jobs with the bulk of workers being employed directly in the mining sector (13,080 jobs). Mining is, by a considerable margin, the Isaac Region's largest output generating sector, supporting an estimated annual output of \$20.89 billion - which is considerably higher than any other sector. In fact, mining accounts for 88% of the region's total economic output.

The influence that mining has on the region's economy is further demonstrated below. Whilst mining is the dominant sector, the region's economy is also supported by manufacturing (2.3% of economic output), agriculture (1.6% of economic output) and construction (1.7% of economic output). Currently, tourism generates a total of \$123 million in economic output, which only accounts for 0.5% of total regional output.



Source: Remplan, ABS 2016 Census Place of Work Employment (Scaled), ABS 2019 / 2020 National Input Output Tables, ABS June 2021 Gross State Product, and ABS 2020 / 2021 Tourism Satellite Account.

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88% of the region's  
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Tourism generates  
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Which accounts for 0.5%  
of total regional output.

The figures and key industries shown above align very closely with the Isaac Regional Council's Economic Development Framework (strategy) 2019 - 2024, with the strategy highlighting Mining, Manufacturing, Agriculture and Construction as being the four main pillars of the Isaac regional economy.

Whilst the tourism sector in the Isaac Region is very much in its infancy, particularly in terms of output and employment, a range of exciting opportunities still exist to further grow and enhance the sector's economic value, including a range of product and infrastructure development opportunities to grow the profile of the region and diversify the current visitor market focus. The Isaac Regional Council is being very proactive in their approach to growing this sector - identifying a range of tourism focused opportunities through the Isaac Tourism Strategy 2019 - 2024.





## THE ISAAC REGION ECONOMY (CONTINUED)

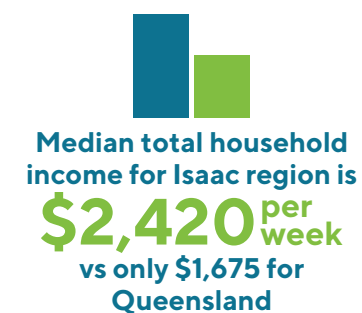
### ii. INCOME

In the Isaac Region, the mining sector generates the highest total wages amount for the local workforce at \$167.3 million, amounting to 14.7% of the region's total wages and salaries. Given this fact, the average weekly income is considerably higher than neighbouring LGAs. The majority of the region's workforce (54% of all workers) earn more than \$2,000 per week, in comparison to neighbouring regions such as Mackay - where 11.5% of the region's workforce earns more than \$2,000 per week, and the Whitsundays, where only 9% of the region's workforce earns more than \$2,000 per week.

The Isaac region's median total household income is considerably higher than the total median household income for the whole of Queensland, coming in at \$2,420 per week for Isaac compared to only \$1,675 for Queensland.

These incomes provide an opportunity through new tourism product development and packaging to target these higher yielding markets and encourage leisure experiences closer to home. It is important to note, however, that there have and will continue to be fluctuations in the performance of the Mackay/Isaac region's mining and resource sectors, which would likely impact market viability.

Source: Queensland Treasury, Queensland Regional Profiles 2021, and Remplan, ABS 2016 Census Place of Work Employment (Scaled), ABS 2019 / 2020 National Input Output Tables, ABS June 2021 Gross State Product, and ABS 2020 / 2021 Tourism Satellite Account.



**Mining + Resource sectors** drive higher average wages in the region



## CURRENT TOURISM VISITATION AND PERFORMANCE (CONTINUED)

### C. Current Tourism Visitation and Performance

#### i. DOMESTIC OVERNIGHT VISITS, INTERNATIONAL OVERNIGHT VISITS AND TOTAL NIGHTS

Overall, in the past year (year ending March 2022) the Isaac region received approximately **578,000 overnight visitors**. Domestic visitors contributed close to 100% of all visitor nights received in the year ending March 2022, which is typical of many inland Queensland destinations, due to a lack of awareness and accessibility to international markets.

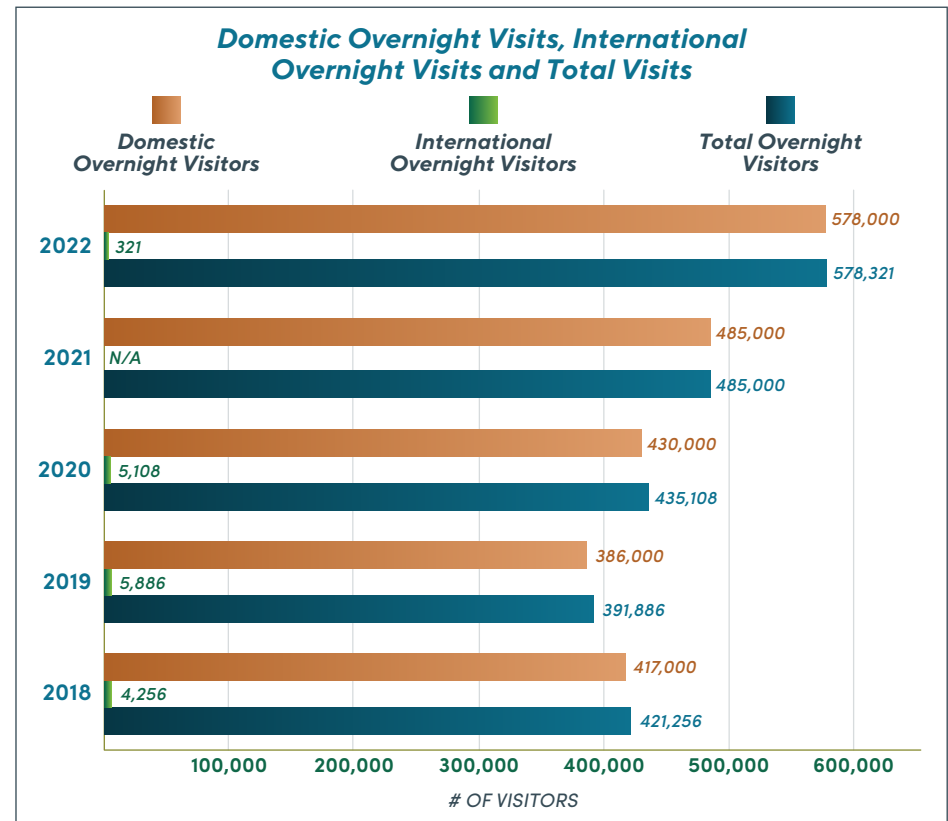
The day trip market for the Isaac region is also significant - with the destination receiving **160,000 day trip visitors** in the year ending March 2022.

The vast majority of domestic visitors in the year ending March 2022 travelled to the Isaac region for the **purpose of business**, highly typical for a region that is economically driven by the mining sector, which caters for significant numbers of FIFO workers.

During this year, close to **77% (447,000 overnight visitors)** of domestic overnight visitors travelled to the region for working/business purposes. The source of these domestic overnight visitors were overwhelmingly split in the favour of intrastate markets, with a total of **544,000 domestic overnight visitors** travelling to the region from within Queensland.

There are however some positive signs for non business related travel to the Isaac, with **84,000 overnight visitors** travelling to the region for the **purpose of a holiday**, and **27,000 overnight visitors** travelling to the destination for the purpose of **Visiting Friends and Relatives (VFR)** for the year ending March 2022.

Unsurprisingly, the Isaac Region has been unaffected by the Covid - 19 Pandemic in terms of overall overnight visitation. In the years ending March 2018 and March 2019, the total domestic overnight visitor numbers amounted to 417,000 and 386,000 respectively. Given the destination's very strong mining and resource sector, the Isaac has managed to buck the trend in terms of visitation - with many more prominent tourism destinations still recovering, and working toward pre-pandemic levels of visitation.

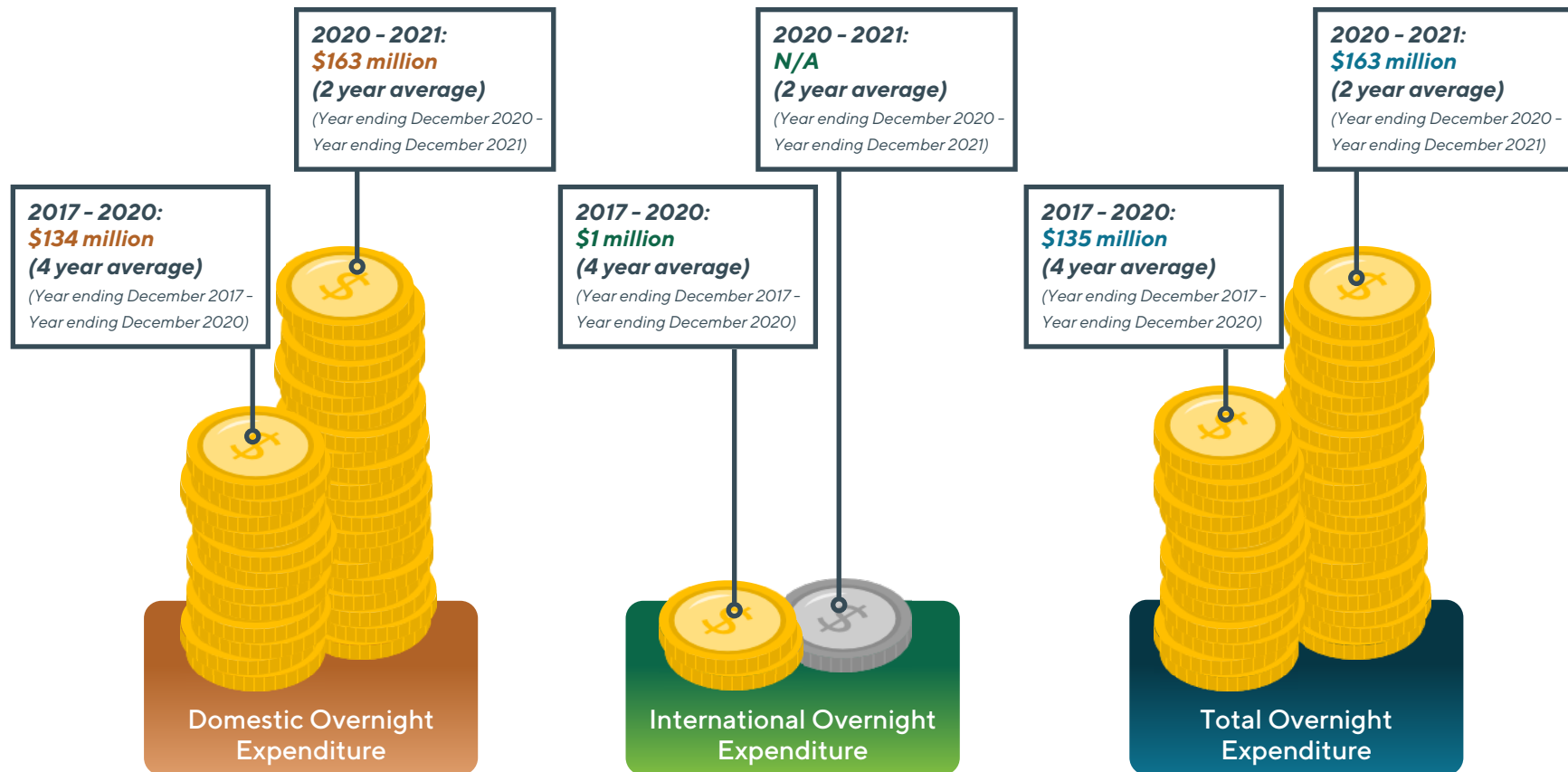


Source: Tourism Research Australia, [www.tra.gov.au](http://www.tra.gov.au), statistics year ending March 2018, 2019, 2020, 2021 and 2022.

## CURRENT TOURISM VISITATION AND PERFORMANCE (CONTINUED)

### ii. VISITOR SPEND

Once again, courtesy of the region's booming mining sector, the Isaac Region levels of visitor expenditure have been unaffected by the Covid - 19 Pandemic over the past couple of years. In fact, total visitor expenditure has experienced strong growth over the past five years, as can be seen in the below infographic:



Source: Tourism Research Australia, [www.tra.gov.au](http://www.tra.gov.au), statistics year ending March 2018, 2019, 2020, 2021 and 2022.

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

## ISAAC VISITOR PROFILE (CONTINUED)

### D. Isaac Visitor Profile

#### i. CURRENT MARKET

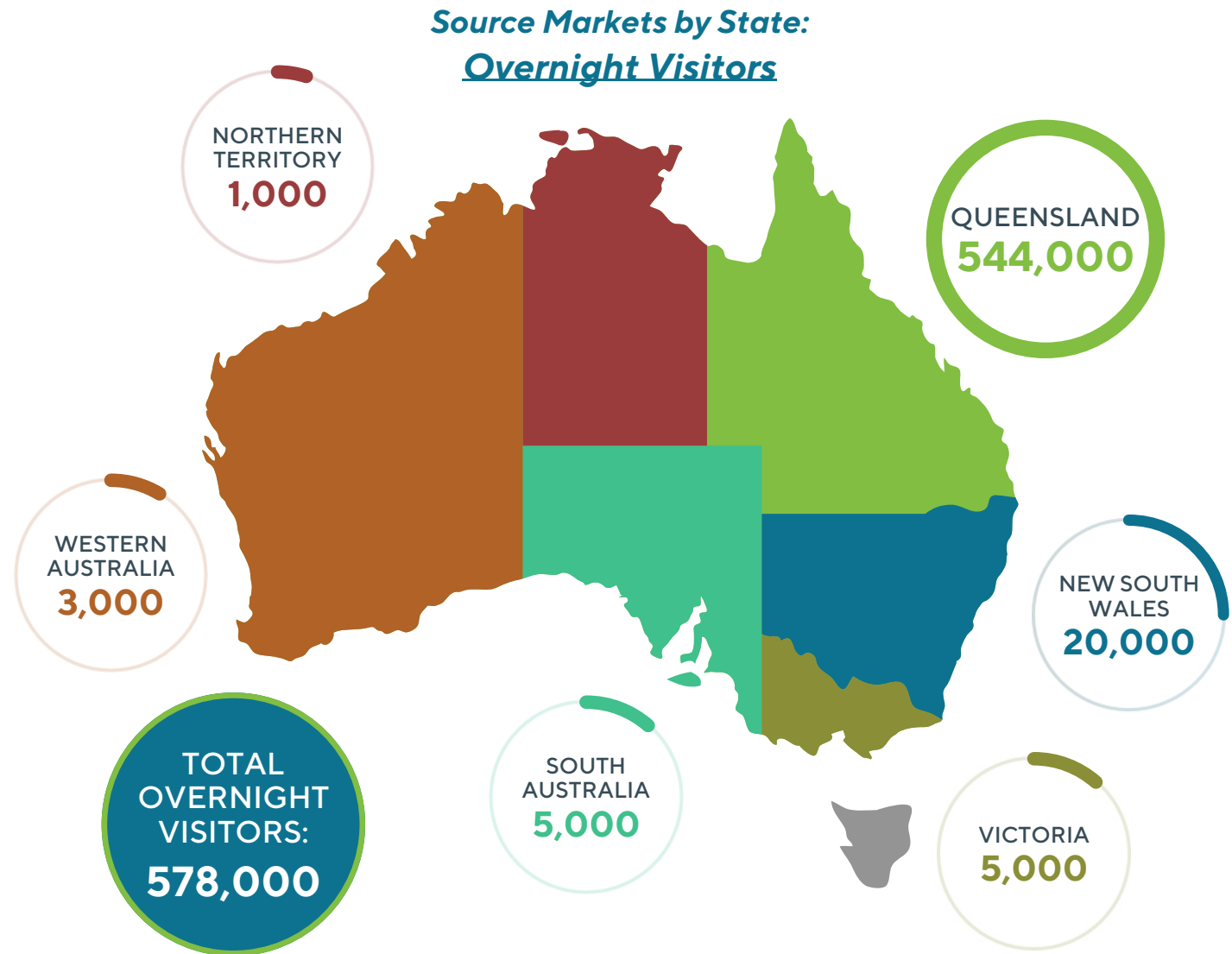
As described above, the current visitor market to the Isaac Region is primarily driven to the region for the purposes of work or business. Whilst this has assisted the region to be particularly resilient over the past couple of years, it does highlight the strong need for economic diversification, with tourism providing a significant opportunity in this regard.

Tourism Research Australia (TRA) statistics for the year ending March 2022 demonstrates the region's solid performance in terms of overall visitation. In this timeframe, the region attracted close to 578,000 overnight visitors (domestic and international), and 160,000 day trip visitors.

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

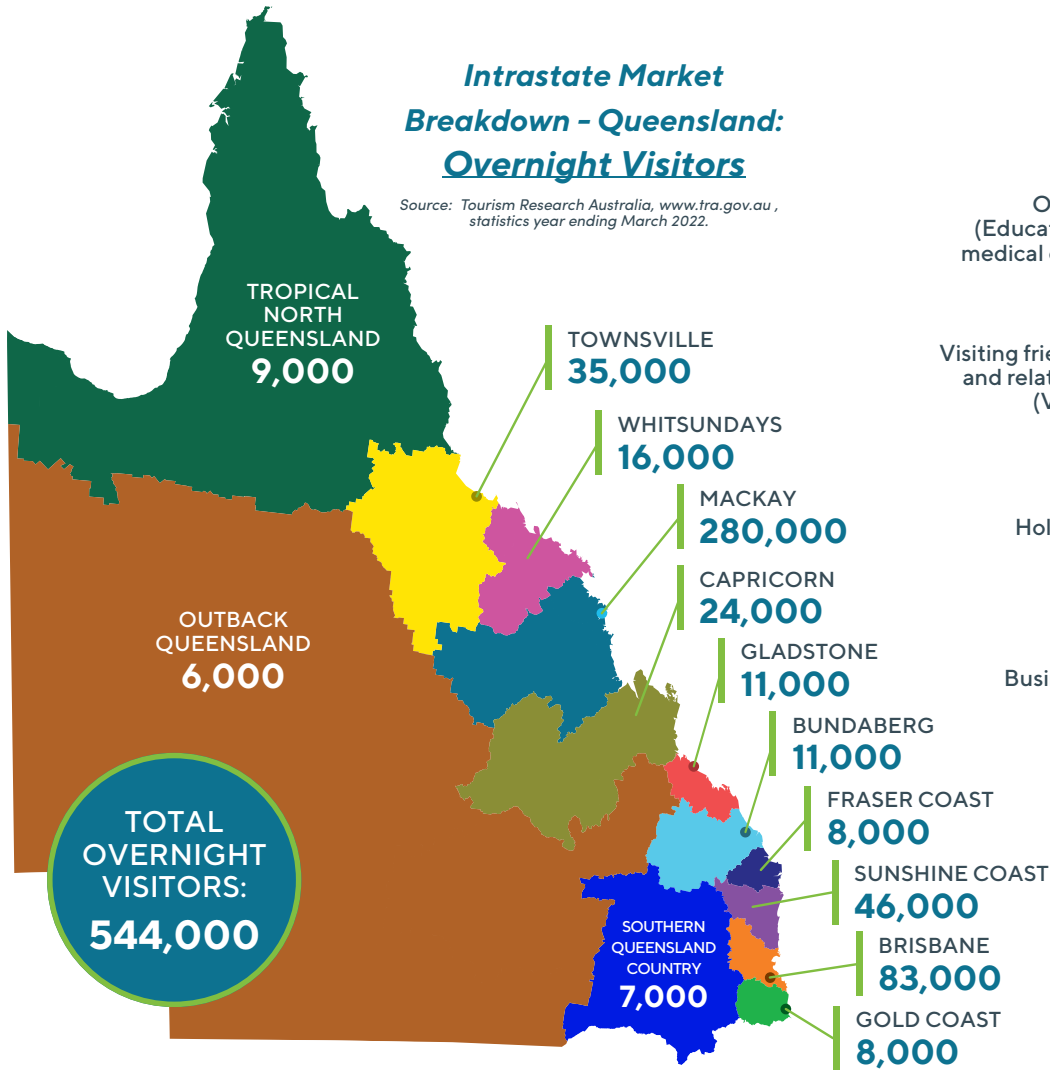
#### Source Markets

Intrastate travel (visitors travelling from within Queensland) are overwhelmingly the largest source of overnight visitors to the Isaac Region. 94% of all overnight visitors to the region in the year ending March 2022 travelled from within Queensland. A further breakdown of these geographic source markets can be seen below:



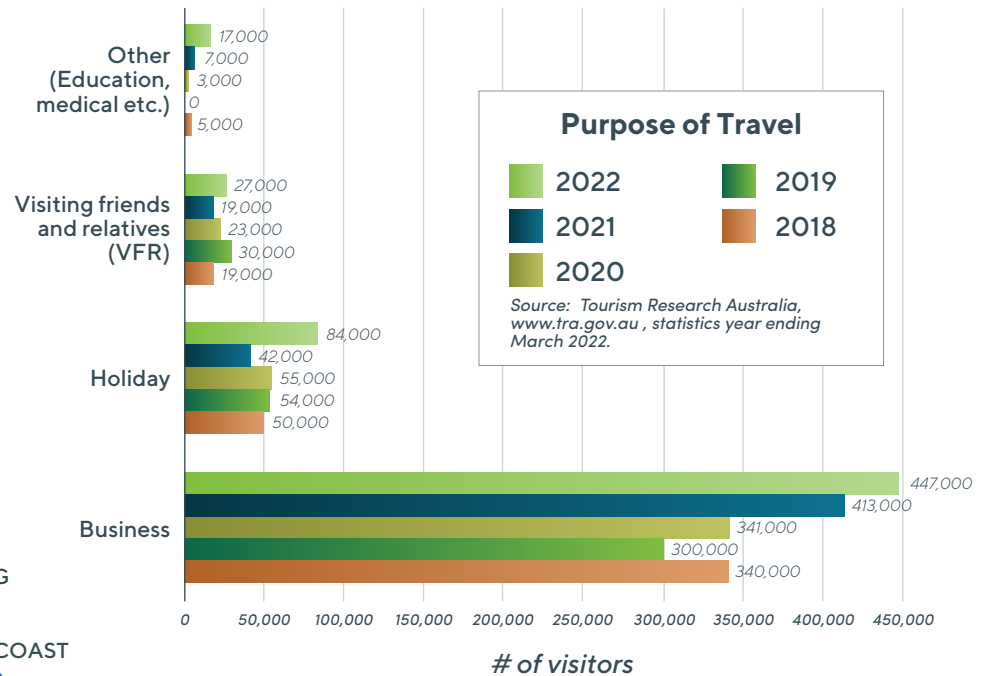


ISAAC VISITOR PROFILE (CONTINUED)



### Purpose of Travel

As detailed previously, visitation to the Isaac Region currently, is overwhelmingly driven by the purpose of work/business. Driven by the mining sector, FIFO rosters are very much the norm. However, there has been recent growth in other purposes of travel, as can be seen in more detail below:



Interestingly, whilst overall visitation was not impacted by Covid-19 restrictions, there was a noticeable decrease in both holiday and VFR visitation in the year ending March 2021, compared to previous years. It is highly likely that this decrease was a direct result of Covid - 19 related travel restrictions. The year ending March 2022 demonstrates a solid rebound in holiday visitation - **an increase of 100%**.

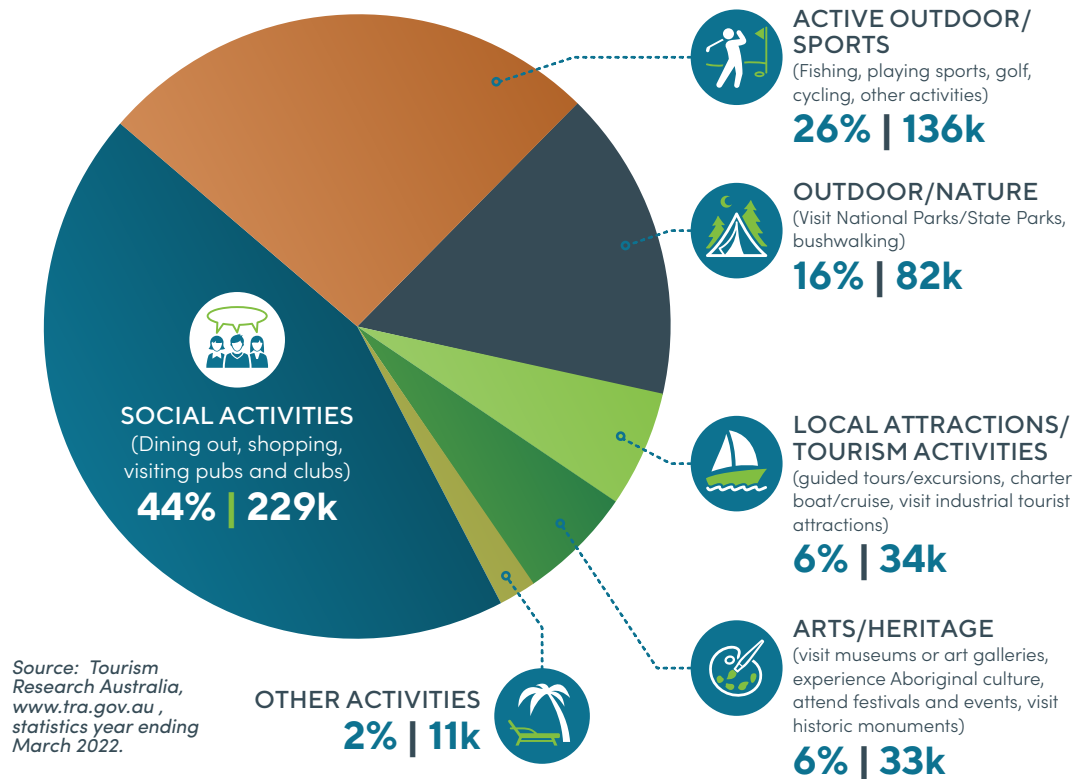
## ISAAC VISITOR PROFILE (CONTINUED)

### Activities Undertaken

Further analysis of visitor activities whilst in the Isaac Region identifies those attributes that are appealing to current and future visitors. Some activities, such as 'social activities' including dining out, visiting pubs and clubs, and shopping perform very strongly – however, it is important to note that 'social activities' are generally ranked very highly, if not the highest, for most tourism destinations. For more regional/remote destinations like the Isaac, it is generally the subsequent activities undertaken in the region that provide the best strategic insights.

'Social activities' is also ranked the most popular activity undertaken in the Isaac (as seen below) predominantly due to the very high levels of business related travel.

### Activities Undertaken - Year ending March 2022



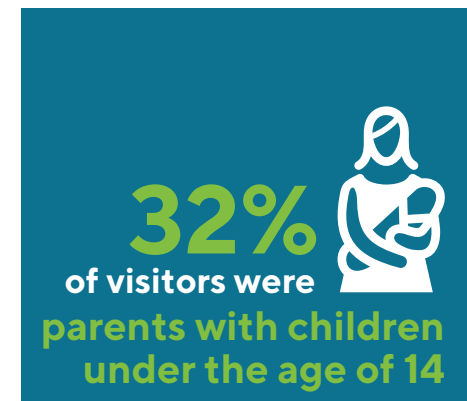
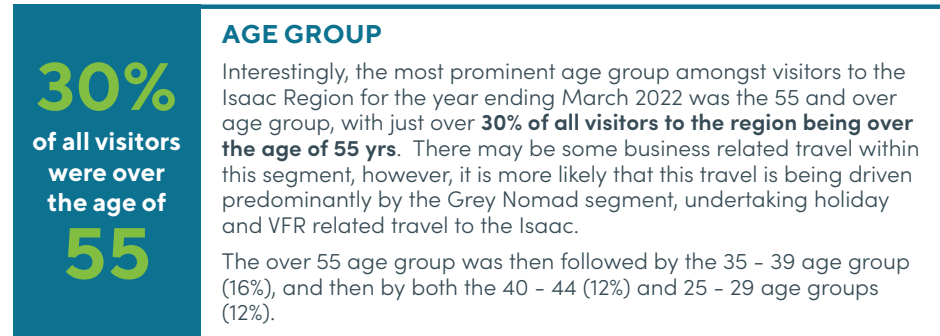
As can be seen opposite – the activities undertaken in the region align closely with the key experience offerings of the Isaac Region, being unique natural assets (Peak Ranges), camping and outdoor options, a rich cultural history and a growing events calendar. The outdoors in particular, National Parks, camping, bushwalking, fishing and visiting the beach all performed highly in terms of activities undertaken in the Isaac Region.



## ISAAC VISITOR PROFILE (CONTINUED)

### Visitor Demographics

In assessing the demographics of visitors to the Isaac Region, for the year ending March 2022, we used several different criteria, in line with TRA's demographic criteria which include:



Source: Tourism Research Australia, [www.tra.gov.au](http://www.tra.gov.au), statistics year ending March 2022

## ISAAC VISITOR PROFILE (CONTINUED)

### ii. POTENTIAL MARKETS

After analysing the above information, and also taking into account some of the markets identified in previous tourism focused strategy documents, we recommend considering the following target markets for the Isaac Region:

TARGET MARKET	DESCRIPTION
<b>Bleisure Market</b>	<p>Business travel is by far the Isaac Region's biggest source market, and as Covid -19 restrictions have seen the 'blurring' of work life boundaries, business travel combined with leisure (bleisure) is growing in popularity Australia wide.</p> <p>Business travellers may be encouraged to bring family to the region, and include additional days to a work trip for the purpose of leisure. The Bleisure visitor is considered opportunistic - and will make leisure associated decisions based on the appeal of the destination they are travelling to for work.</p> <p>Bleisure visitors are typically culturally curious and interested in work. The Isaac Region benefits from a significant number of FIFO workers. Emphasising the lifestyle appeal of the region and converting these from flying out to staying in - or bringing family - presents significant opportunities for the region.</p>
<b>4 Hour Drive Market</b>	<p>This market lives and/or works within a four-hour radius of the Isaac Region. Visitors are travelling purely for leisure, and will use their own vehicle to travel. They may also often be towing a camper trailer or caravan. This group of visitors are highly mobile and can access all parts of the region, they like to explore, travel beyond the 'known' tourism destinations and spend money with local businesses.</p>
<b>Visiting Friends and Relatives (VFR)</b>	<p>A growing market for the Isaac Region, these visitors travel to the destination to spend time with loved ones. It is common for these visitors to combine their travel with events, holidays, or business. VFR visitors will often rely on their host family/friends to guide them on what activities to do - highlighting the importance of locals understanding what is on offer in the Isaac. These visitors are less likely than others to pay for accommodation and spend time in traditional attractions.</p>
<b>Couples: soft adventure, sports, and touring</b>	<p>Adventure seeking couples are typically those that seek enjoyment from the outdoors, and are characterised as couples who look for ways to reconnect with one another and with nature in a fun and engaging way.</p> <p>'Transformational Experiences' are highly sought after by this market. They are looking to engage in experiences that inspire, enrich, and empower their lives. Opportunities to connect with the local community and give back to the destination are also important.</p>
<b>Prospectors (hobbyists and professionals)</b>	<p>The recreational prospecting sector in the Isaac Region is diverse, with both hobbyist and professional prospectors visiting the area to pursue a wide range of prospecting targets, including gold and varieties of treasure.</p> <p>Prospectors visit the destination from both interstate and intrastate markets, with their expenditure both on-trip and off-trip making important economic contributions to the Isaac economy.</p>



# 3 TOURISM AUDIT

This section details the tourism experience/attraction, accommodation and event audits for the Isaac Region. The overall objective was to determine what experiences, accommodation types and events are currently on offer, and where they are located. This mapping then identifies gaps - the opportunities for the region's overall visitor experience, how existing assets and opportunities correlate with proposed tourism trails and what might be needed in order to address some of these gaps and opportunities. This is a critical point of focus for this project.

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

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

Whilst the Isaac Region is not recognised as having a developed tourism sector like some of its neighbouring regions, such as the Whitsundays, the region does possess a number of significant natural assets that provide rich tourism experience development opportunities, and a competitive edge over some neighbouring regions.

**Whilst there are currently a relatively small number of bookable tourism experiences on offer, the appeal for local businesses to start new tourism focused businesses will be boosted as increased exposure, access and management of the region's natural and cultural assets is pursued.**

## A. Experiences/Attractions Audit and Key Findings

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

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

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

- 'General' cafes, restaurants and bars have been excluded from the audit so as not to skew the results. The audit only focuses on venues and facilities that provide unique experiences, such as cooking classes, breweries, etc; and
- Non-major beaches and lookouts are also excluded for the same reasons; and
- Destination and community events have also been excluded (they are included in the event audit component of this scope of work).

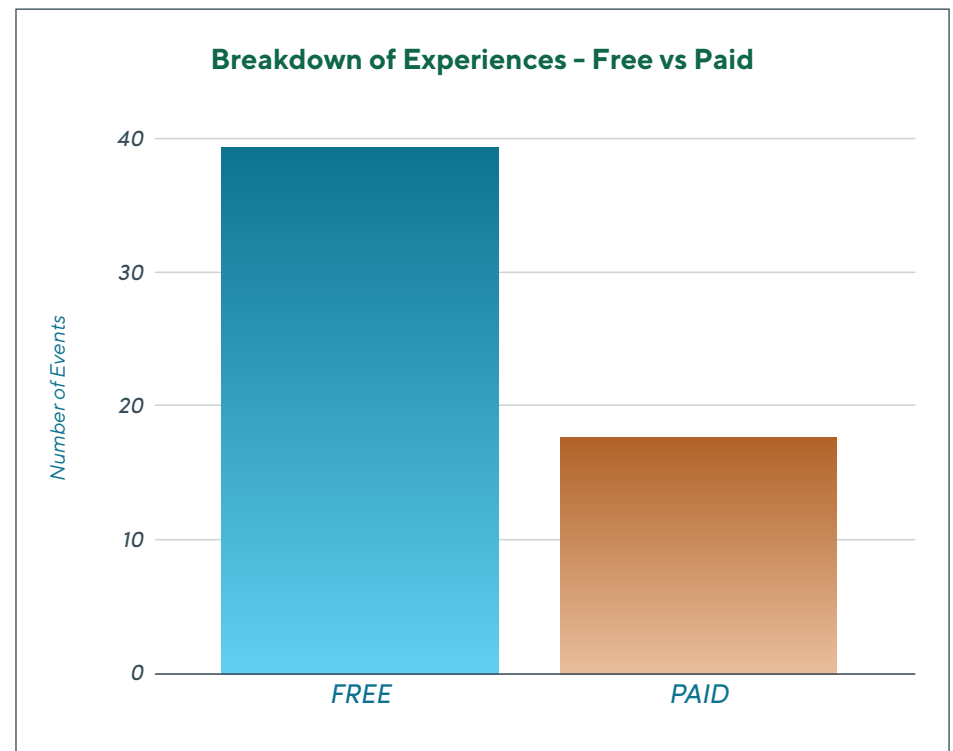
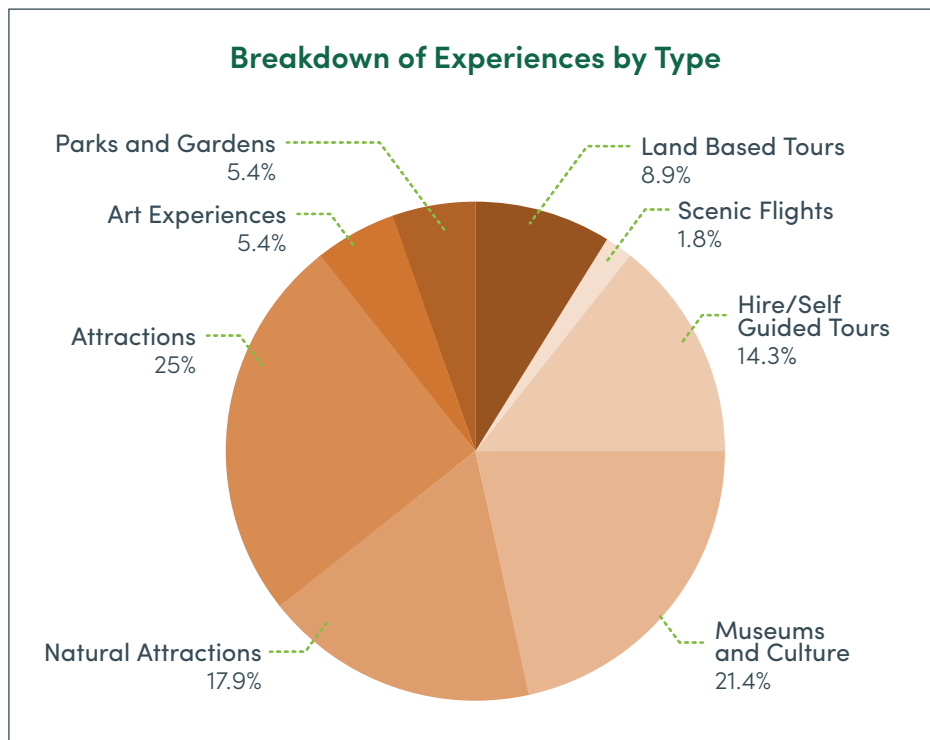
## EXPERIENCES/ATTRACTIONS AUDIT AND KEY FINDINGS (CONTINUED)

### Key Findings

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

- We identified 56 tourism experiences and attractions that are currently on offer within the Isaac Region through this audit. Note that the audit undertaken uses several key sources and may not be an exhaustive list;
- The majority of experiences that are on offer are Attractions, 25% of all on offer in the Isaac. Attractions include those that are typically man made, or are islands/destinations with infrastructure present;
- A high portion of all experiences/attractions on offer in region are free experiences, coming in at 70% of all experiences;

- 36% of all experiences/attractions (region's highest concentration) on offer throughout the Isaac Region are centred around Clermont;
- Overwhelmingly, the majority of experiences/attractions involve outdoor activities, so are very weather dependent. Just 9% of all experiences/attractions available in the Isaac are indoor products; and
- There are a large number of experiences/attractions that do not have ATDW listings with only 23% registered.



## ACCOMMODATION AUDIT AND KEY FINDINGS (CONTINUED)

### B. Accommodation Audit and Key Findings

The accommodation audit focused on a number of different accommodation options and categories, with categories being:

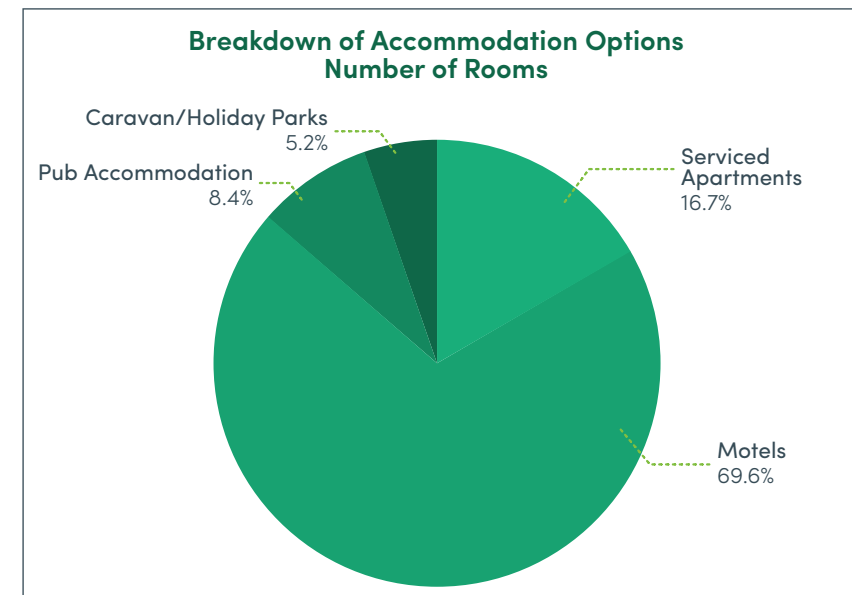
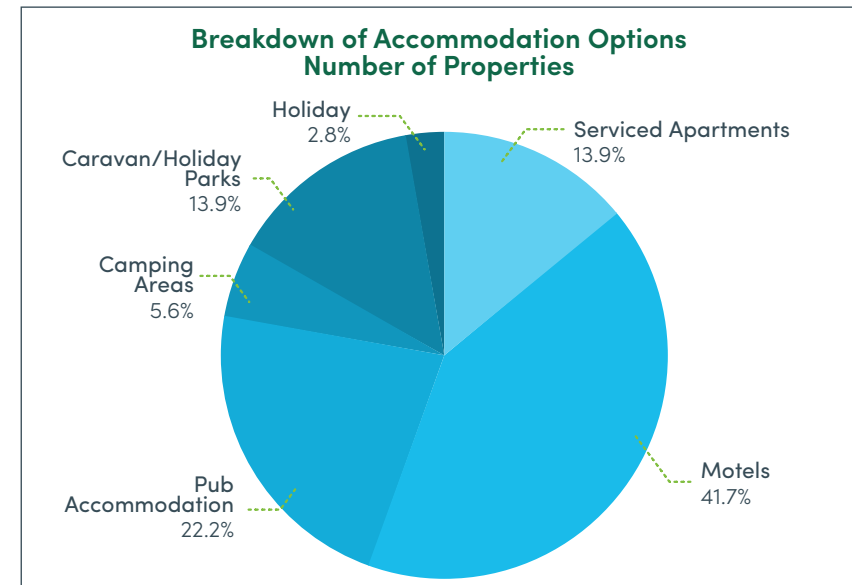
- Serviced Apartments;
- Motels;
- Pub Accommodation;
- Camping Areas;
- Caravan/Holiday Parks;
- Holiday Homes/Apartments;
- Backpackers; and
- Mining accommodation.

In some cases, for campsites, powered and unpowered caravan sites, etc, room numbers were unavailable/difficult to calculate. We also excluded the mining accommodation from the findings below because the number of mining accommodation rooms in the Isaac Region are significant and will skew the overall results of the accommodation options analysis and assessment piece. Mining accommodation is also, typically either not available or unappealing to the typical leisure traveller.

#### Key Findings

Noting the above, key findings of the accommodation audit included:

- The Isaac region has a total of 37 accommodation properties with approximately 833 rooms available;
- Motels are the most common accommodation type on offer in the Isaac, accounting for 42% of all properties on offer with the highest number of rooms overall - providing approximately 70% of all room stock (580 rooms);
- There are a large number of accommodation providers in the Isaac Region that do not have ATDW listings - with just 22% (8 operators) of all accommodation providers having an ATDW listing.
- For holiday parks/caravan parks, the room count reflects only those in cabin/villas offered, it does not reflect powered/unpowered sites.



## EVENTS AUDIT AND KEY FINDINGS (CONTINUED)

### B. Events Audit and Key Findings

The audit included the events that are considered to be primary tourism focused events. The events have been divided into the following categories:

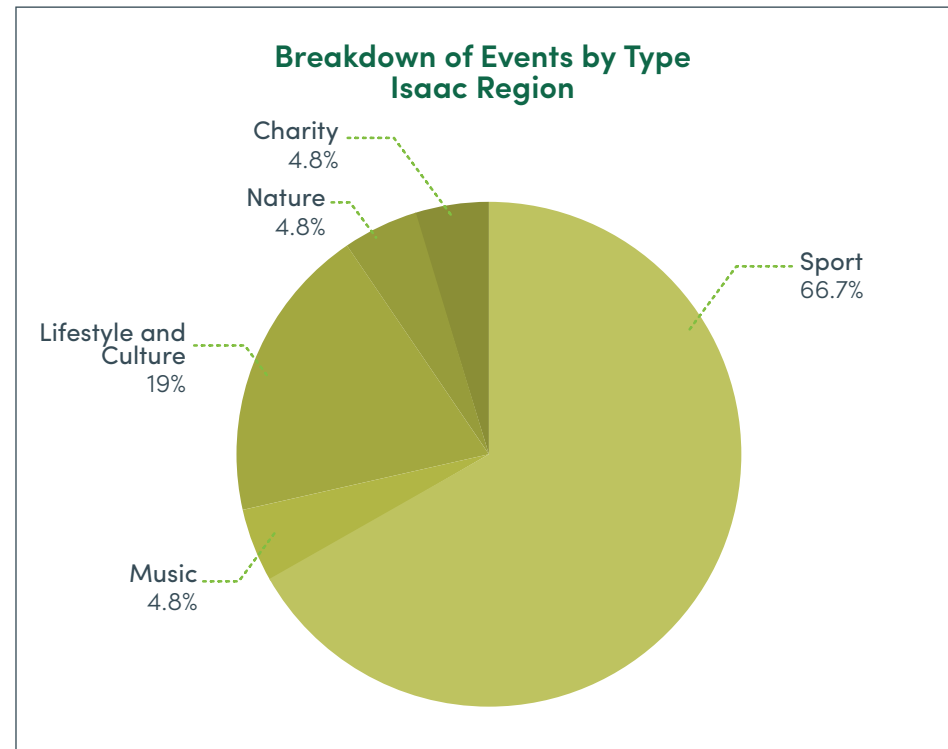
- Sport;
- Music;
- Lifestyle and Culture;
- Nature; and
- Charity.

Events such as smaller community events, that are focused on catering for local residents as opposed to visitors have been excluded from the below audit, as including them may skew the overall findings of the initial audit and subsequent gap analysis. **We acknowledge that this boundary can be blurred.**

#### Key Findings

Some key points to note from the audit include:

- We identified 21 events that are currently on offer within the Isaac Region through this audit. Note the audit uses several key sources and may not be an exhaustive list;
- The majority of events that are on offer are sporting events, which accounted for 67% of all events on offer in the Isaac. Of these sporting events, the majority were focused on rodeo and campdraft events;
- The location of the events are quite evenly distributed across the region, with the bulk of the events located in Middlemount, Clermont and Nebo, accounting for 24%, 19% and 19% of all events on offer respectively;
- The vast majority of the events listed above are not registered with ATDW. In fact, just one event is registered with ATDW.





# 4

## EMERGING ISSUES, IDEAS AND DISCUSSION TOPICS

We have commenced the consultation phase of this project which is, arguably, the project's most important piece of work. Nobody knows the region better than Isaac locals and visiting workers – and we need your thoughts, ideas, insights and knowledge to make this overall plan the best it can possibly be.

There are several key topics we would like to discuss in the consultation workshops in Clermont and Moranbah on the 8th November, including:



1. ***How can we balance more activation of tourism with local needs? Specifically:***
  - a. *Does visitor traffic negatively affect travel on our main roads and in our communities?*
  - b. *What if increased tourism and usage meant a loss of access or usage by locals. How can we balance this and satisfy all users?*
2. ***Peak Ranges could be a major tourism attraction in QLD. How can we balance our needs against Parks and Wildlife's need to carefully manage the sites perhaps through restrictions on developing guided or independent walks?***
3. ***How can we weave art and culture (galleries, museums, artists/ sculpture trails) into our trails concepts?***
4. ***How can we weave events into our trails concepts?***
5. ***Assess each of these broad scenarios to optimise tourism and meet the aims of the Isaac Tourism Trails project:***

## EMERGING ISSUES, IDEAS AND DISCUSSION TOPICS (CONTINUED)

### PEAK RANGES AND CONVENIENT OUTBACK EXPERIENCE TRAIL

The Peak Range is a chain of prominent, bronze and picturesque mountains between Moranbah, Clermont and Dysart. The sharp peaks are visible from a considerable distance across the flat country plains and provide spectacular views and are one of Isaac region's most iconic experiences. Hike on defined walking trails with good signage and amenities, perhaps take a guided tour or camp nearby. If you want more 'convenient outback', take in an event or rodeo at Nebo or visit Mount Britton.

### GOLD FEVER PROSPECTING AND MODERN MINING TRAIL

Explore the gold mining heritage, perhaps a day tour of the modern coal mining industry, viewing areas of an operating coal mine and hearing about mine rehabilitation. This trail includes: Eungella rainforest, gold rush pioneers at Mount Britton, Lake Elphinstone camping, Nebo's heritage, Moranbah, Clermont / Theresa Creek Dam where you can visit Queensland's most accessible goldfields and strike gold with a tour and guide.

### GREEN COASTAL EXPERIENCE TRAIL

Taking in St Lawrence - Flaggy rock - Clairview beach - Carmila - Notch point - Greenhill/Cape Palmerston. A trail with serene beaches, rugged 4WD adventures, spotting Dugongs and birdlife, fishing, crabbing and boating. Perhaps visit an island. The best of coastal Queensland in relaxed and stunning campgrounds.

### GREEN, BRONZE AND GOLD EXPERIENCE TRAIL

An east-west journey leaving either the Bruce Highway heading west at St Lawrence or Koumala, or leaving the Great Inland Way east from Clermont or Belyando Crossing, combining the best of the Green Coastal Trail with the Gold Fever Prospecting and Convenient Outback through Nebo, the Peak Ranges or Lotus Creek.

### INDIGENOUS CULTURAL TRAIL

Explore the culture and heritage of our diverse First Nations peoples which might include a short tour on country with traditional custodians or an interpretative centre tour. Learn more about Indigenous language, see the land through different eyes, enter a world of ancient traditions, in a unique journey of discovery, in this beautiful region.

**6. What are our target markets in your view?**

**7. What is the ideal balance of roles for Isaac Regional Council to both facilitate and regulate the further development of tourism experiences?**





**ISAAC**  
**REGION**   
*HELPING TO ENERGISE THE WORLD*

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