

MACKAY REGION RECREATIONAL FISHING STRATEGY 2017-2022

Final Report

June 2017

EXECUTIVE SUMMARY

This Strategy sets a framework for the sustainable management and development of the Mackay region's recreational fishing sector and provides a plan for maximising economic benefits and opportunities.

The Mackay region starts from a position of strength – its varied range of fish species and diverse range of freshwater and marine fishing locations provide the core attributes necessary for the region to become a premier recreational fishing destination. Designation of the Net Free Zone has provided the additional impetus necessary to take the next step – it can be a gamechanger for the region.

Vision

The Mackay Region will become one of Queensland and Australia's premier recreational fishing destinations, renowned for our offer of superb fishing 365 days of the year.

Positioning

One of the themes that recurred throughout consultation in preparing this Strategy was identifying the issues and attributes which differentiate Mackay region as a fishing destination. Key themes to emerge included;

- Net Free Zone and growing health of fish-stocks
- A more varied range of fishing opportunities (in terms of types of location) than most competitor destinations i.e. coastal, reef, islands, river/estuary, dams etc.
- Good accessibility of the Mackay region in relation to target markets
- Quality of landscapes and environment i.e. Great Barrier Reef, national parks, beaches etc
- Proximity to a wide range of tourism destinations - Whitsundays, Great Barrier Reef etc.

These features are at the core of what attracts fishing visitors to the region, however, mixing in local stories, characters, heritage and landscapes provides the basis to develop clear market positioning. An extension of this process is to establish a distinct set of hero fishing experiences which enables the Mackay region to stand out from the crowd. This type of messaging should be at the heart of marketing activity.

Strategic Themes

The recommended strategy is straightforward and is based on building on our strengths – our great location and wide range of fishing opportunities. The building blocks of nurturing our fish stocks and habitats, and targeted investment in infrastructure provide the basis for sustainable growth. Alongside these practical measures, effective marketing to our target markets can make a real difference in terms of profile and awareness, resulting in increased visitors numbers, expenditure and support for local employment.

Target Markets

Research suggests the need for three distinct target markets to maximise available opportunities;

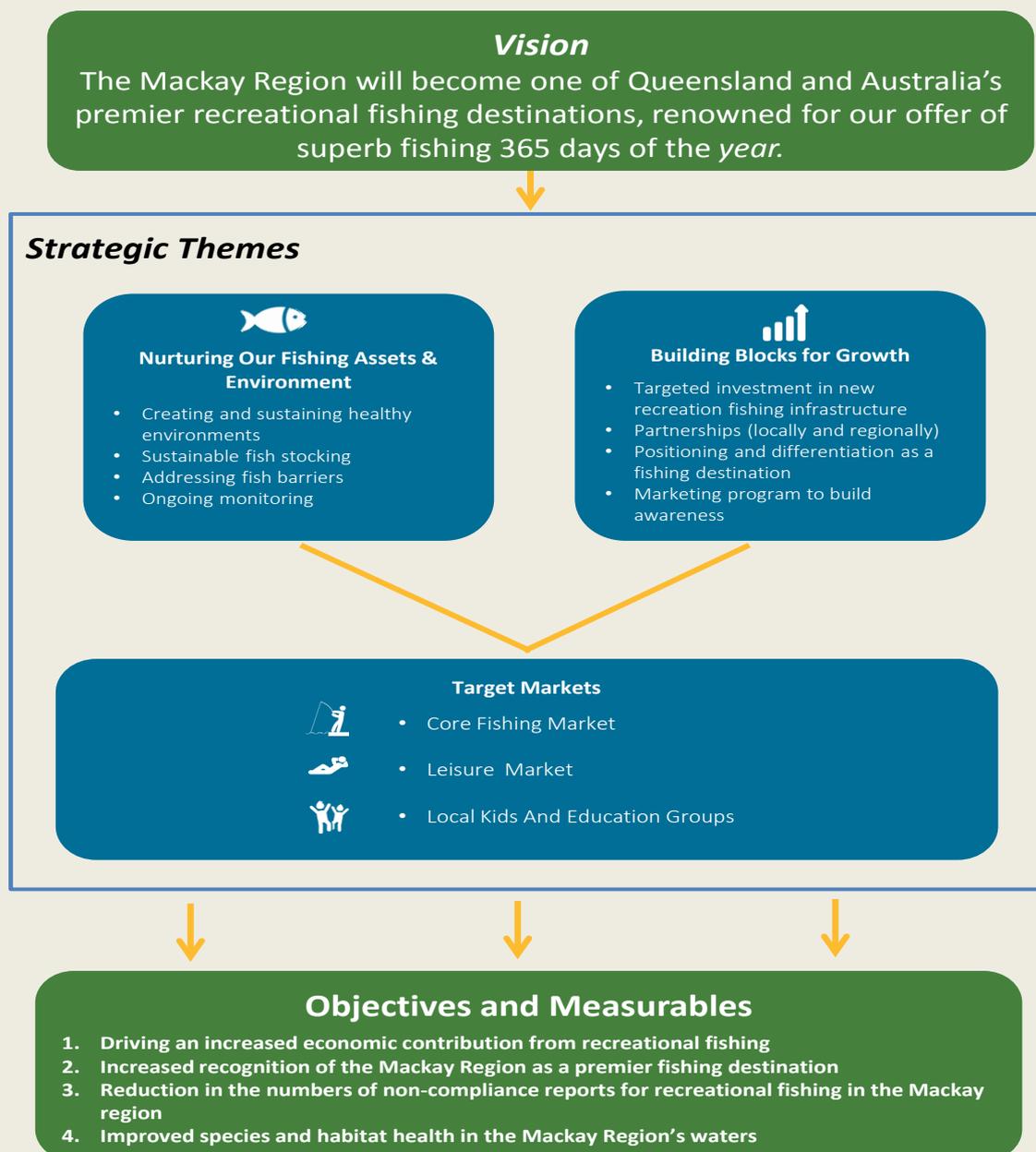
1. **The core fishing market.** Those whose primary purpose of a trip is to fish. This group can be from local, regional or international origins. They will usually bring their own gear and be knowledgeable about sites and species. They are most likely to be influenced to choose the

region for a fishing trip via either word of mouth or specialist fishing media (blogs, fishing publications, high profile professional events etc). The trigger is often the hope of catching a particular species or to take part in a competition.

2. **The holiday/leisure market.** While fishing is unlikely to be the primary purpose of the trip, individuals may be interested in a day's fishing as part of the overall trip. The region's core holiday market is within a 4 hr drive distance - touring trips, short breaks and visiting friends and relatives. This market is composed of couples, families and small groups. This group may or may not bring fishing gear with them and knowledge of fishing sites and tackle shops as well as awareness of species and rules & regulations may be more limited.
3. **Local kids and education groups.** Fishing is a popular activity among local communities, providing kids with easy access to fishing opportunities which will help ensure ongoing commitment and understanding (i.e. GBRMPA Reef Guardians program, school fishing, etc). Fishing and its marine and freshwater environments are also tied closely to education and key curriculum topics, particularly the overarching sustainability theme.

The following diagram summarises the Strategy's approach to driving sustainable economic growth from recreational fishing in the Mackay region.

Strategy Framework



Actions to Achieve our Objectives

A collaborative approach between Council, State Government and the voluntary sector is required to implement the strategy. Reflecting the potential external funding and partnership opportunities available, implementation of the Strategy can contribute to a range of policy agendas, including; education, accessibility, conservation, environment, sport and recreation, marketing and events, tourism and business development.

A series of actions have been recommended to deliver the Strategy’s vision and objectives under the themes of;

- Ecology and Fisheries Management
- Recreational Fishing Infrastructure
- Business and Product Development
- Marketing and Positioning
- Enabling Developments

Actions have been prioritised over the five year term of the strategy as follows;

Timing	
Short-term:	• Years 1 and 2 (2017/18 to 2018/19)
Medium-term:	• Years 3 and 4 (2019/20 to 2020/21)
Longer-term:	• Year 5+ (2021/22)
Ongoing:	• Ongoing throughout the strategy term (2017/18 to 2021/2022)

Full details on the recommended actions can be found in section 5 of this report; however the proposed lead actions are as follows:

Recreational Fishing Infrastructure

1. Assess requirements for infrastructure upgrades following demand assessment and needs analysis, balancing the anticipated increasing demand for access in the Net Free Zone with provision throughout the region.
2. Establish and implement a strategic signposting program incorporating welcome and Net Free Zone signage i.e. “Welcome to the Mackay Region Fishing Haven – A Queensland Net Free Zone”.

Marketing

3. Establish and implement a 5 year marketing program to build recognition of the Mackay region as a premier recreational fishing destination and drive new visitors to our region.

Ecology and Fisheries Management

4. Develop and promote a new Voluntary Code of Conduct in the Net Free Zone for recreational fishing.

Business and Product Development

5. Develop a prospectus to promote new recreational fishing business development opportunities, and attracting new business investment to the Mackay region.

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All images provided in this document are courtesy of Tourism and Events Queensland, Mackay Regional Council, Luke Galea and Lee Brake.

Unless otherwise stated, all tourism data and statistics presented in this report are sourced from Tourism Research Australia for Year Ending September 2016.



1.CONTEXT AND BACKGROUND



1.1 Purpose of the Document

This Strategy seeks to set a framework for the sustainable management of the Mackay region's recreational fishing assets and provide a plan for maximising economic benefits.

The Strategy identifies and prioritises a series of projects and actions needed to support the recreational fishing industry, enabling the Mackay region to harness the available economic benefits and resulting support for employment creation and overall liveability.

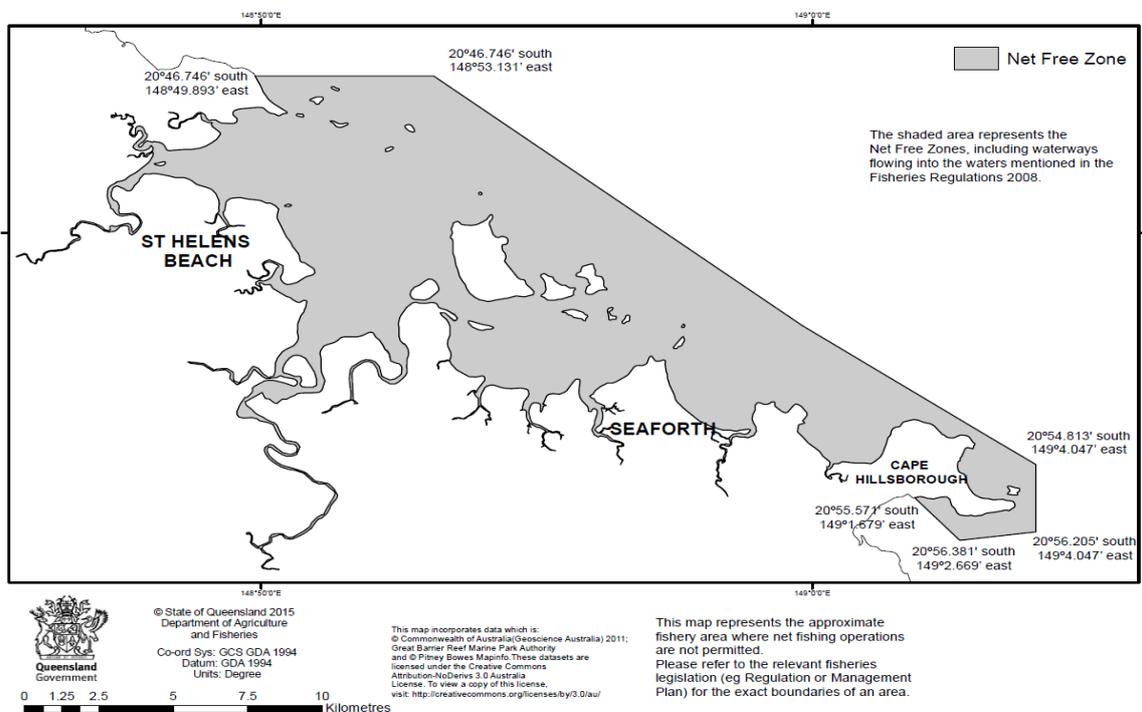
The Strategy encompasses the Mackay Region local government area but focuses on the region's primary fishing areas, including; beaches, stocked impoundments, estuary and reef fishing sites. Declaration of the Mackay region's Net Free Zone in 2015 has provided a particular impetus in preparation of this Strategy.

1.2 Context: Policy & Planning

Net Free Zones

The Queensland Government introduced commercial Net Free Zones (NFZ) in Mackay, Cairns and Rockhampton on November 1, 2015. The use of gill-nets by licensed commercial fishing boats is prohibited within these designated zones; however recreational fishing activities are permitted. In addition to building and conserving fish stocks, the potential of Net Free Zones to increase recreational fishing opportunities and to support tourism and economic growth were explicitly recognised.

Figure 1: Mackay Region Net Free Zone

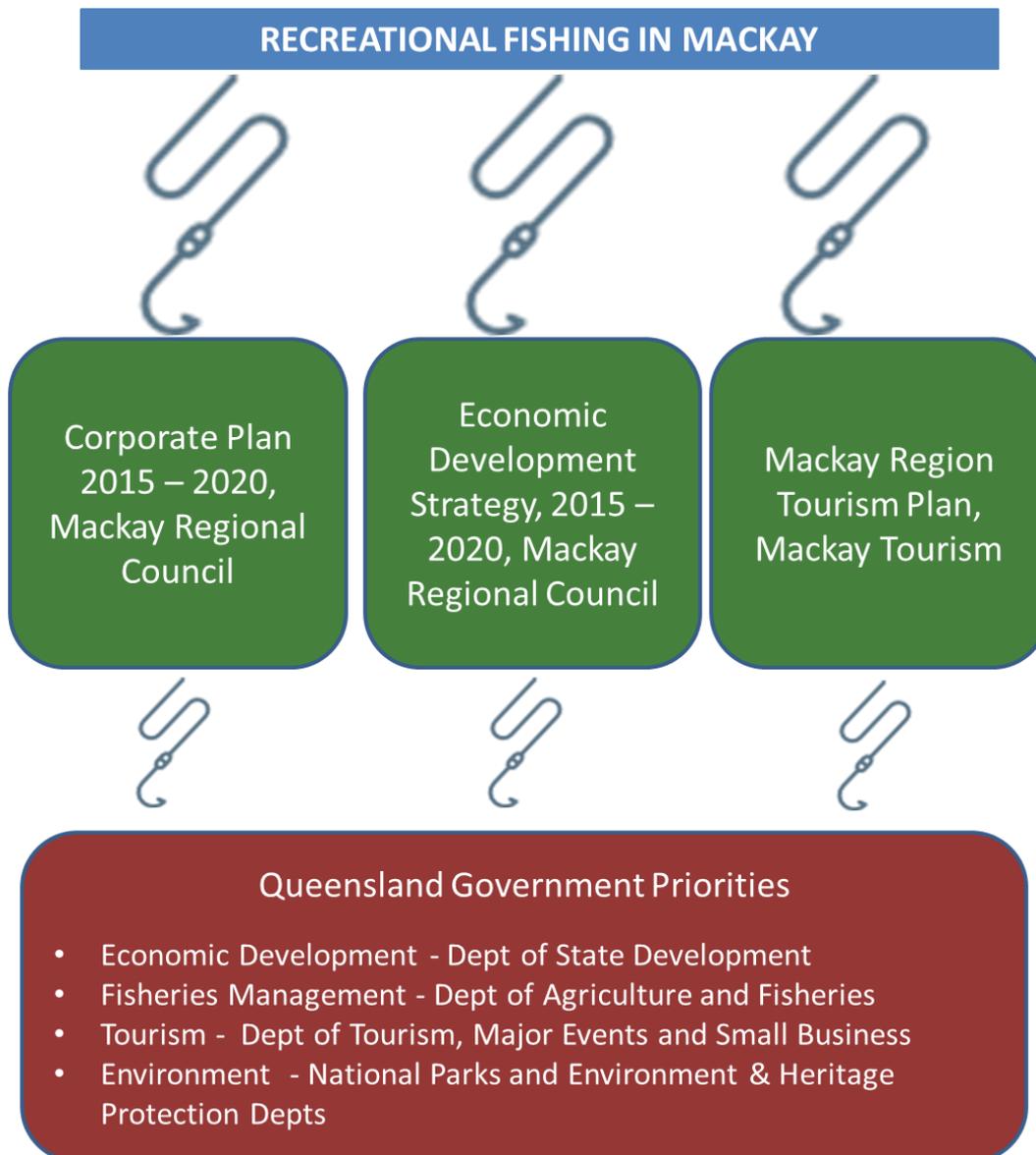


The declaration of the Mackay NFZ extending from Cape Hillsborough to St Helens Beach provides a unique economic development opportunity for the Mackay Region.

Recreational Fishing's Role in Contributing to the Mackay Region's Goals and Objectives

Capitalising on the region's recreational fishing asset and growth opportunities is seen as contributing to a range of liveability and economic objectives of the Mackay Regional Council, Mackay Tourism and the Queensland Government as illustrated in figure 2, below.

Figure 2: Recreational Fishing's Contribution to Policies and Objectives



2. RECREATIONAL FISHING IN THE MACKAY REGION



2.1 Recreational Fishing in the Mackay Region

The Mackay region offers a huge diversity of recreational fishing opportunities, with a large number of sites providing access to the region's coastline, dams, islands, rivers, estuaries and reefs.

Facility Provision and Usage

The figure of approximately **14,000 boat registrations** represents the largest number of any Queensland council area outside the south east. The overall level of provision in terms of ramps and facilities is significant when compared with most other areas. However a particular challenge for the region is the limits that the high tidal range places on the region's boat launching infrastructure and access points (all-tide or near all-tide boat ramps).

In practical terms, this situation means that **the region's effective boat ramp lanes are more intensively used** (number of boat registrations per effective boat ramp lanes) than in most other local government regions. Figure 3 provides a summary of boating infrastructure, comparing the Mackay region with a number of other Queensland local government areas.

Figure 3: Mackay Region Boating Facilities

Local Government Area	Number of Boat Registrations (June 2016)	Number of Facilities	Number of Boat Ramp Lanes	Number of All Tide Boat Ramp Lanes	Number of Near All Tide Boat Ramp Lanes	Number of Effective Boat Ramp Lanes	Number of Boat Registrations per effective boat ramp lanes
Mackay	13,732	23	39	2	15	29.6	464
Cairns	10,573	15	29	12	11	30.4	348
Rockhampton/Livingston	9,787	16	37	17	6	35.8	273
Gladstone	7,837	15	31	16	9	29.7	264
Fraser Coast	10,574	23	50	13	21	43	246

Source: Recreational Boating Facilities Demand Forecasting Study 2016 (State-wide Overview), GHD Pty Ltd, December 2016

Mackay Regional Council, Sunwater and the Department of Transport and Main Roads (TMR) alongside local communities and progress associations are the key players in investing in, and managing boat ramp and associated facilities. Key considerations include;

- Sunwater is responsible for funding and managing ramps at the privately owned dam sites i.e. Eungella, Teemburra and Kinchant
- The Department of Transport and Main Roads works in partnership with local government and port/water authorities to provide new and improved recreational boating facilities throughout Queensland. Under these longstanding arrangements, the Department of Transport and Main Roads funds and builds the in-water components of a facility, while councils and port/water

authorities provide the land-based components, and then manage the whole facility when completed. TMR's capital investment is funded through the Marine Infrastructure Fund (MIF). The Queensland Government has recently committed to a \$30 million 2-year extension of the MIF running from July 2016 to June 2018 to provide new and upgraded recreational boating facilities.

Local Demand

Consensus from available research is that the majority (approximately 90%) of **usage of boat ramps is from Mackay region residents**, demonstrating the importance of these assets to local communities.

Traffic counts identify the following as typically being the highest volume Council managed sites;

- Mackay Harbour boat ramp
- River Street boat ramp
- Sarina Beach boat ramp
- Victor Creek boat ramp
- Campwin Beach boat ramp
- Murray Creek boat ramp

Recreational fishing demand varies widely across seasons and is heavily weather dependent - a combination of seasonal and weather conditions generates very strong levels of peak demand at boat ramps and other fishing spots. While capacity can be extended at some sites, catering for these very strong levels of peak demand is challenging. In the Mackay region, fishing (rather than other watersports or other recreational activities) is the dominant demand driver.

Considerations and pressures on management of recreational fishing infrastructure include;

- A growing population from 126,370 people in 2016 to 171,313 people in 2036 (+36%)¹
- Conflicting uses in some locations - Mackay Harbour and Hay Point are two examples. Ideally increased capacity at other locations would be brought on stream to shift some of the demand load
- Car parking provision ideally should directly correlate with boat ramp/ access capacity, however the costs can be significant and land is often not available
- Continued demand growth in the Net Free Zone - capacity constraints at some existing boat ramps is recognised
- High tidal ranges make provision of all or near all-tide ramps difficult - the cost of establishing completely new boat ramp sites is often prohibitive, particularly when access roads and parking are also required
- Increased demand for complementary support facilities at ramps – cleaning facilities, toilets etc.

Figure 4 contains a listing of current and planned upgrade works.

¹ Source: Queensland Government population projections, 2015 edition: Local government areas snapshot <http://www.qgso.qld.gov.au/subjects/demography/population-projections/reports/qld-govt-pop-proj-lga-snapshot/index.php>

Figure 4: Current Planned Boat Ramp/Infrastructure Upgrading Projects in the Mackay Region

Location	Scope of Works	Financial Year Start	Status
Sarina Beach	Feasibility study for new floating walkway	2016-17	Works scheduled for delivery 2017/18
Carpet Snake Point, St Helens Beach	Upgrade existing boat ramp and causeway	2016-17	Works scheduled for completion late-2017.
Port Binnli, Mackay	Installation of an additional floating walkway	2016-17	Works scheduled for mid-late 2017
River Street, Mackay	Upgrade existing boat ramp plus installation of a floating walkway	2017-18	Works completion scheduled for late-2017
Half Tide Tug Harbour	Installation of a new pontoon (gangway-access pontoon)	2016-17	Works completion scheduled for late-2017

Source: Current and announced projects: <https://www.tmr.qld.gov.au/Projects/Name/R/Recreational-boating-facilities/Current-and-announced-projects>

Visitor Demand

Recreational fishing is a hugely popular leisure activity throughout the whole of Australia, although participation numbers have been broadly static in recent times.



Fishing is a hugely popular activity in Queensland (circa 15% of Queensland's population)



830,000+ anglers in NSW and ACT



Strong international market - 315,000 international visitors to Australia participate in fishing.

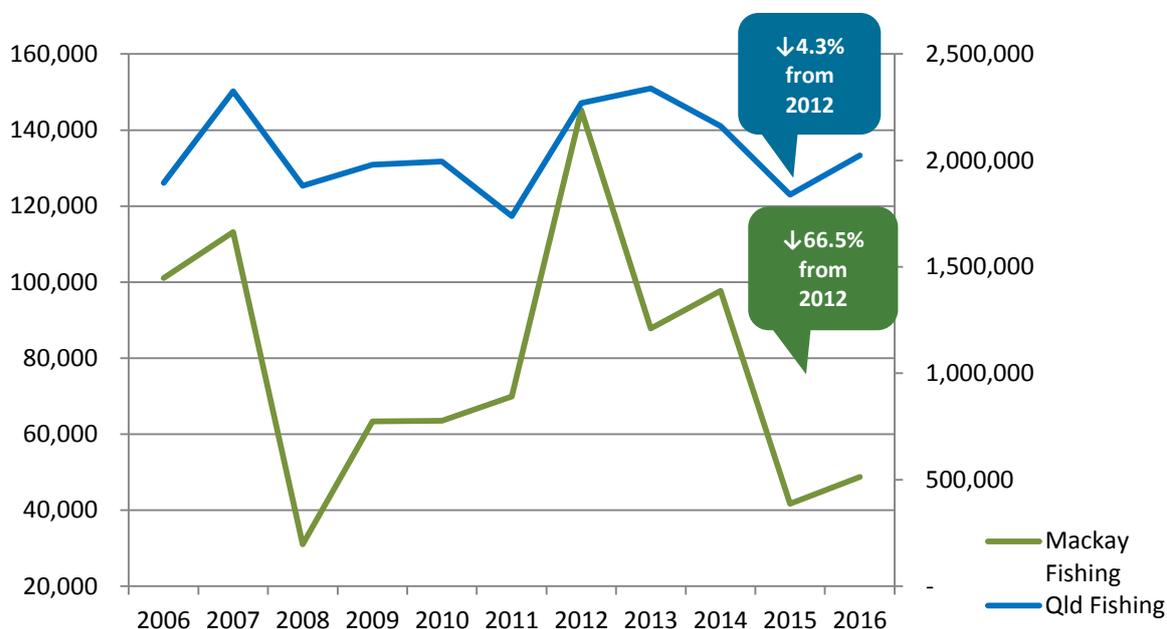
From a visitor market perspective, in 2016, approximately **5% of visitors** to the Mackay region undertook fishing as an activity (**49,000 visitors**).

Since 2012, the number of visitors participating in fishing in the Mackay region has fallen steeply - a **66% drop compared to 4% for Queensland** as a whole (see Figure 5, over). In Mackay's case, this drop directly correlates with a fall in the number of business and visiting friends and relatives sector trips after the resources sector peak (see figure 6, over).

This general trend has also been seen in other Queensland resource-dependent regions and local government areas. Peaks and troughs vary from area to area dependent on resource industry construction/operational phasing, however the **peak highs and subsequent falls** in business/visiting friends and relatives visitor numbers has been **steeper in Mackay than in most other areas**.

The Mackay region’s visitor economy has seen large swings in performance, largely influenced by trade from the resources sector. As Mackay’s economy continues to stabilise and visitor volumes start to normalise, market analysis suggests that we can expect a steady rise in fishing visitors, as shown in a small increase in numbers between 2015 and 2016. In the medium-term the **impact of the Net Free Zone** on fish stocks and habitat can however be a gamechanger – with effective promotion, further growth opportunities are available.

Figure 5: Number of Visitors Participating in Fishing in Queensland and Mackay Region

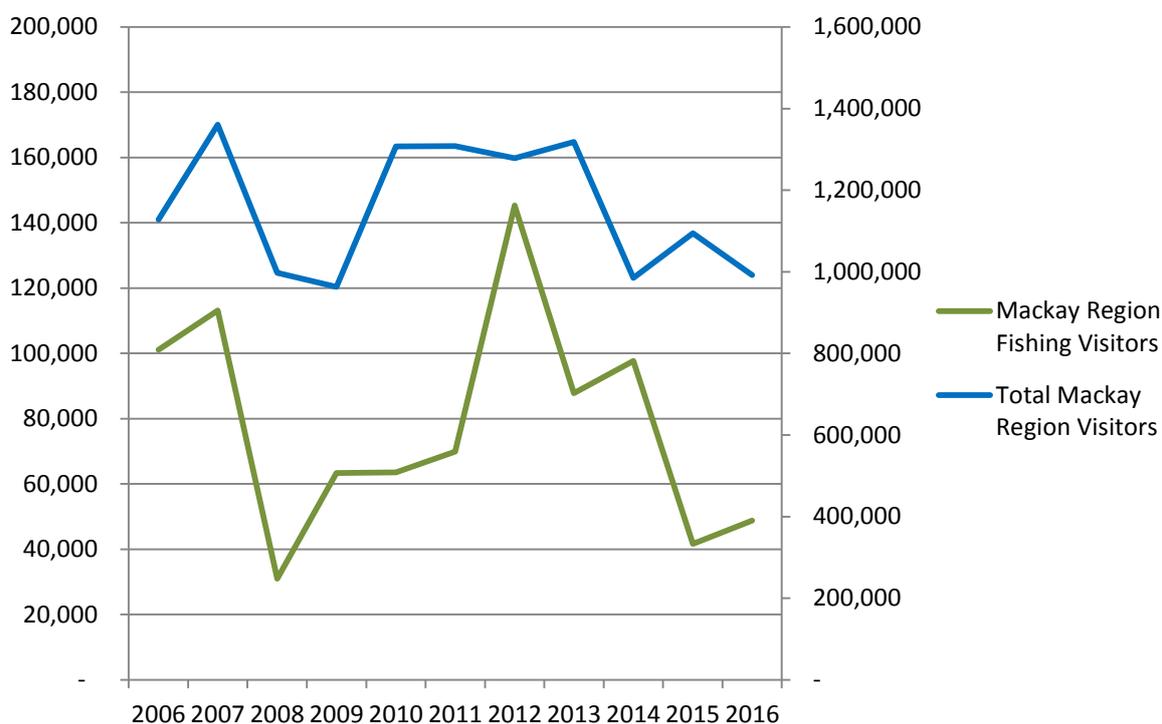


Source: Tourism Research Australia, International Visitor Survey, Domestic Visitor Survey, 2016



In 2016 fishing visitors to Mackay region contributed an estimated **\$23million in tourism expenditure**

Figure 6: Mackay Regional – Total Visitor Numbers compared with Fishing Visitors



Mackay region is one of three Net Free Zones in Queensland, with the others being located in Rockhampton and Cairns. Figure 7 shows the relative size and importance of fishing as part of the region’s visitor market.

Figure 7: Fishing Visitors - Queensland

	Mackay Regional Council	Hinchinbrook Shire Council	Cairns Regional Council	Rockhampton Regional Council	Fraser Coast Regional Council	Queensland
Number of Fishing Visitors	49,000	40,000	104,000	18,400	115,500	2 million
Fishing visitors as a % of total local visitor numbers	5%	15%	4%	1%	9%	3%
Area’s share of overall Queensland visitor numbers	2%	2%	5%	1%	6%	-

Source: Tourism Research Australia, International Visitor Survey, Domestic Visitor Survey, 2016

2.2 Stakeholder Perspectives

A wide range of stakeholder views were gathered to help inform the preparation of this Strategy, including;

- A series of consultation meetings with key stakeholders (see appendix 2)
- A workshop with key fishing stakeholders
- Community e-survey (March 2017) via Connecting Mackay
- E-survey of business operators.

Key perspectives can be summarised as follows;

Business Perspectives

- Local businesses were strongly supportive of the vision to grow the economic development potential of recreational fishing
- Decisions on where to place most focus i.e. core fishing market or broader leisure market varied between business types - i.e. tourism, boat operator etc
- Boat ramps at Mackay Harbour and Hay Point are popular among the recreational fishing community, however, parking and potential safety constraints are recognised.

Community Perspectives

A survey of Mackay region residents' views towards recreational fishing was carried out as part of the Strategy development. Key feedback included support for;

- The vision to grow the economic development potential of recreational fishing
- The promotion of the Gooseponds as a fishing location
- Environmental measures including tilapia eradication, addressing fish passage barriers and more effective monitoring and compliance
- Introduction of a code of conduct for recreational fishing in the Mackay region
- More marketing of the region as a fishing destination
- Investment of new/improved land based fishing platforms
- Improved boat ramp provision in both the north and the south of the Mackay Council Area
- Additional parking at Mackay Harbour
- Sealed car parking, BBQs, fish cleaning facilities are important support features for boat ramps
- The importance of good access, including road infrastructure.

Tourism Perspectives

- Recognition of the potential economic benefit from attracting fishing visitors
- Opportunities to develop a regional partnership in North Queensland to position the region as Australia's home of fishing – potential to add value and generate additional benefits for individual areas including the Mackay region
- Recognition that diversity of species and diversity of fishing locations are genuine strengths of the region, however, we need to build a clear and differentiating position in the tourism market - unclear at present what our 'hero experience' is
- Events can play a big role in building profile and awareness of the region as a premier recreational fishing destination
- The consensus of views expressed is in that greatest economic benefit can be generated by initially focusing on the core fishing market, while gradually building recognition in broader leisure markets

- New 'product' in the form of visitor experiences such as charter operations, guiding, tours etc is required to help build opportunities in leisure markets prior to major marketing investment.

Environmental Perspectives

- Recognition by all stakeholders that healthy fish stocks and habitats are central to long term opportunities – fish stocking, removal of fish passage barriers, recreational fishing volume and behaviour, quality of habitats etc are all important considerations
- Need for greater understanding and awareness among the recreation fishing community on compliance and best practice
- GBRMPA insights on compliance trends/hotspots can support awareness and assist in awareness raising initiatives
- Support for the role that a voluntary code of conduct for recreational fishing could play
- Sharing of data and forging new partnerships on monitoring and measurement have potential for development
- As a reef guardian council, opportunities to investigate innovative use of local planning instruments, including offsets, to help protect and enhance marine and freshwater habitats.

Infrastructure Perspectives

- As manager/ owner of infrastructure at Kinchant, Teemburra and Eungella Dams, Sunwater is recognised as a key stakeholder. Sunwater recognises the importance of the recreational fishing assets that it manages. As a non-core Sunwater activity it is recognised that investment in supporting recreational fishing infrastructure needs to be carefully targeted. Particular challenges are noted in terms of peak period weekends and increasing demand for support infrastructure. Ongoing engagement between Sunwater and other recreational fishing stakeholders will be a priority in this regard.
- The Department of Transport and Main Roads (TMR) funded an independent consultant study during 2016 to investigate demand for boating infrastructure based on boating registrations, postcodes, and population trends. The study is available at www.tmr.qld.gov.au/Projects/Name/R/Recreational-boating-facilities/Recreational-Boating-Facilities-Demand-Forecasting-Study-2016. TMR's website indicates that the study may be used by any delivery agency and is one consideration only among many criteria for establishing infrastructure investment priorities. Mackay Regional Council and TMR officers regularly liaise about proposed and potential partnership projects.



A scenic view of a riverbank. The left side is dominated by a dense forest of tall, green trees. The right side shows a rocky shoreline with small stones and pebbles. The water is calm and reflects the sky. A blue banner with yellow text is overlaid on the middle of the image.

3. RECREATIONAL FISHING: BEST PRACTICE

3.1 Best Practice and SWOT Summary

2.3.1 Best Practice Review

A desktop review was undertaken to help understand the attributes which help destinations become regarded as premier fishing spots. Destinations included in the review were; Cairns region, Gippsland, Hinchinbrook, inland Tasmania, Exmouth/Ningaloo Reef, Port Stephens, and Northern Territory – Top End. Although there is natural variation between destinations, a number of common components are apparent;



Quality and Health of Fish Stocks: First and foremost – marine and freshwater environments which support healthy and sustainable fish stocks. The promise or at the least, a good chance of catching fish features strongly in destinations' appeal and are key triggers for visiting decisions.

Specific Fish Species: Each destination has its unique or famed species, creating differentiation for destinations.



Diversity of Opportunities: Dependent on the environment in question/ size of the region, a diverse range of fishing opportunities is a common attribute - this can mean; freshwater and marine environments, different fishing opportunities across the year, diversity of species, easily accessible and more remote locations etc.

High Quality Landscapes and Environments: The nature of fishing is that it often takes visitors off the beaten track - while high quality or spectacular landscapes often provide enticing backdrops. These backdrops help deliver the 'Facebook' image moments for the destination.



Accessibility: Being able to easily get to the destination is a practical issue, however many of what are regarded as premier fishing spots are in remote locations – a remote location in itself is not an insurmountable barrier.



Marketing and Awareness: Whether through recreational fishing networks, or tourism promotion, marketing to target audiences can be extensive, including innovative examples such as the NT's Million Dollar Fish initiative. Word of mouth among recreational fishing networks is a powerful tool (two thirds of all trip decisions are influenced by word of mouth) however, dedicated marketing or inclusion within mainstream tourism marketing is essential if awareness outside core fishing markets is to be generated. Most successful destinations will seek to inform visitors via tools such as blogs, news stories, suggested itineraries etc.



Product: In the tourism sector, 'tourism product' can mean a group of components or elements brought together in a 'bundle' to satisfy the consumer's need - most importantly it is something that can be sold to the consumer. In the fishing sector this can be experiences such as charter boats, guided fishing etc. Premier destinations tend to benefit from a good

range of these type of tourism products or experiences, not simply relying on the quality of the fishing itself. A good range of product also provides an important means of generating economic value from fishing visitors.

Events: Professional fishing events provide an important means of raising the profile of a location as a serious fishing destination - formally recognised or accredited events - can help 'quality-mark' a place as a bona fide fishing destination.



Visitor Infrastructure: While not always practical in remote locations, successful destinations are often located in close proximity to a range of other visitor infrastructure - accommodation, attractions, and food & drink options. These considerations are important if the destination is to have broad market appeal.

Partnerships: Close and effective working relationships between the recreational fishing sector, tourism industry and public sector are key enablers for sustainable management and growth.



The following table summarises the Mackay region’s current recreational fishing positioning against a series of best practice considerations – green denotes a relative strength, amber indicates that renewed action may be necessary and red specifies a priority for action.

Figure 8: Assessment of the Mackay region as a fishing destination against best practice measures

Best Practice Component	Mackay Region’s Current Performance
Quality and Health of Fish Stocks	Positive and improving, albeit compliance remains an ongoing concern <ul style="list-style-type: none"> Well-stocked impoundments NFZ having a growing impact on health of fish stocks
Fish Species	<ul style="list-style-type: none"> Good variety of species, led by barramundi and sooty grunter Jungle perch trial also offers significant potential
Diversity of Opportunities	<ul style="list-style-type: none"> Competitive advantage - dams, rivers, islands, estuaries, NFZ and access to reef
High Quality Landscapes and Environments	<ul style="list-style-type: none"> Proximity to Great Barrier Reef Variety of landscapes – from beaches to hinterlands
Accessibility	<ul style="list-style-type: none"> Direct air access Less remote than some other premier fishing destinations
Partnerships	<ul style="list-style-type: none"> Committed recreational fishing, tourism and public sector partners Regional interest in collective working on fishing in North Queensland
Marketing and Awareness	<ul style="list-style-type: none"> Some perception challenges with the Mackay region associated primarily with agriculture and servicing the resources sector Need to continue building awareness in leisure markets
Events	<ul style="list-style-type: none"> A range of competition events in place Opportunity to attract high profile professional events to the region
Visitor Infrastructure	<ul style="list-style-type: none"> Range of visitor infrastructure available including accommodation and nature-based recreation opportunities Opportunities to extend and realign after resources sector has peaked
Product	<ul style="list-style-type: none"> In comparison to some other established fishing destinations, the current range of commercial product is limited i.e. tours, charters, guiding etc

2.3.2 Strengths, Weaknesses, Opportunities and Threats Assessment

The Mackay region is planning from a position of strength - the Net Free Zone and diversity of fishing opportunities are among the attributes already on offer that give it a competitive advantage. While the region cannot afford to rest on its laurels, identified opportunities do significantly outweigh perceived threats.

<i>Strengths</i>	<i>Opportunities</i>
<ul style="list-style-type: none"> • Net Free Zone • Wide range of fishing locations - dams, rivers, islands, reef, beach • Good species range • Established core fishing market • Committed public, private and community sector partners • Strong existing partnership between Council and the recreational fishing sector • Large local, domestic fishing market, growing international interest • Existing recreational fishing infrastructure on the whole is good, albeit coming under increasing demand pressures 	<ul style="list-style-type: none"> • Anticipated growth in recreational fishing generated by the Net Free Zone • Grow further awareness of the NFZ – signposting, marketing and positioning • Successful jungle perch trial may enable the introduction of a new species that can be fished • Opportunity to promote a 7 day fishing offer – variety of location and species • Making it easy for visitors - information, packaging and itineraries • Creating a unique market positioning for Mackay’s fishing opportunities • Continued investment in addressing fish barriers and habitat improvement measures. Development of ‘fish hotels’ in dams offer great potential as measures which can improve habitats and act as marketing/ profile raising tools • Targeted investment in recreational fishing infrastructure – ramps, parking, BBQ, toilets etc. With capacity constraints at the harbour in particular, a focus needs to be the Net Free Zone sites • Landside platforms can provide accessible solutions • New business and product development opportunities - charters, guiding, tours etc • New camping accommodation at Teemurra Dam • A North Queensland regional partnership to grow awareness of fishing opportunities positioning the wider region • Grow visitation from broader leisure markets as well as the core fishing market • Proximity to leading tourism attractions and leisure destinations – Great Barrier Reef and the Whitsundays • Refreshed and improved marketing to grow awareness and drive visitation in target markets • The Gooseponds has potential for development - a central location provides good opportunities • Utilising high profile professional events as a means of growing awareness of the destination as a fishing hub

Weaknesses

- Mackay region is not widely perceived as a leisure destination
- Weather conditions and high tidal range presents challenges at times
- Flooding and tidal events in the region are a reality – damage can occur to fishing infrastructure
- Differentiators as a fishing destination not totally clear
- Access challenges (roads) in relation to some sites
- Numbers of visitors fishing in Mackay have dropped over the past few years – directly correlating with a drop off in business and related activity
- Some recurring issues noted with non-compliance in the recreational fishing sector, although noted that in practice, commercial sector compliance is potentially a more significant consideration
- Security and lighting are issues at some fishing sites
- Limited marketing of the opportunities offered by the Net Free Zone to this point
- Signposting for NFZ absent
- Awareness/educational information for fishing visitors can be improved
- Mackay Harbour and Hay Point are key access points – constraints are recognised for recreational vessels in a busy port area

Threats

- Competition from other fishing destinations
- Popular sites such as fishing from the harbour breakwater are done informally – an accident in this type of location may lead to access being stopped
- Failure to differentiate - many other destinations have similar attributes
- Following a status quo course of action which seeks to maintain current investment and direction is likely to result in some increases to numbers and economic gain, however potential is unlikely to be fulfilled



4. VISION AND GOALS



4.1 Vision

The Mackay region starts from a position of strength – its diverse species and the diverse range of freshwater and marine fishing locations provide the attributes necessary for the region to become a premier recreational fishing destination. Designation of the Net Free Zone has provided the additional impetus necessary to take the next step – it can be a gamechanger for the region.

The Mackay Region will become one of Queensland and Australia’s premier recreational fishing destinations, renowned for our offer of superb fishing 365 days of the year.

4.2 Positioning

What enables the Mackay region to stand out as a fishing destination?

One of the themes that recurred throughout consultation in preparing this Strategy was identifying the issues and attributes which differentiate the Mackay region as a fishing destination. Key themes to emerge included;

- Net Free Zone and growing health of fish-stocks
- A more extensive range of fishing opportunities than most competitor destinations i.e. coastal, reef, islands, river/estuary, dams etc.
- Good accessibility of the Mackay region in relation to target markets (400km radius for leisure markets)
- Quality of landscapes and environment i.e. Great Barrier Reef, national parks, beaches etc
- Proximity to a wide range of tourism attractions and destinations - Whitsundays, Great Barrier Reef, touring opportunities etc.

These features are at the core of what attracts fishing visitors to the region, however, mixing in local stories, characters, heritage and landscapes provides the basis to develop clear market positioning. An extension of this process is to establish a distinct hero fishing experience which really allows Mackay to stand out from the crowd. This type of messaging should be at the heart of marketing activity.

4.3 Strategic Themes

The recommended strategy is straightforward and is based on building on our strengths – our great location and wide range of fishing opportunities. The building blocks of nurturing our fish stocks and habitats, and targeted investment in infrastructure provide the basis for sustainable future growth. However, alongside these practical measures, effective marketing to our target markets can make a real difference in terms of profile and awareness, resulting in increased visitors numbers, expenditure and support for local employment. It is recommended that the core fishing market should continue to be our initial focus, complemented with building product and marketing to broader leisure markets over the term of the strategy.

Strategy Framework

Vision

The Mackay Region will become one of Queensland and Australia's premier recreational fishing destinations, renowned for our offer of superb fishing 365 days of the year.

Strategic Themes



Nurturing Our Fishing Assets & Environment

- Creating and sustaining healthy environments
- Sustainable fish stocking
- Addressing fish barriers
- Ongoing monitoring



Building Blocks for Growth

- Targeted investment in new recreation fishing infrastructure
- Partnerships (locally and regionally)
- Positioning and differentiation as a fishing destination
- Marketing program to build awareness

Target Markets



- Core Fishing Market



- Leisure Market



- Local Kids And Education Groups

Objectives and Measurables

1. Driving an increased economic contribution from recreational fishing
2. Increased recognition of the Mackay Region as a premier fishing destination
3. Reduction in the numbers of non-compliance reports for recreational fishing in the Mackay region
4. Improved species and habitat health in the Mackay Region's waters

4.4 Objectives and Measurables

Driving an increased economic contribution from recreational fishing

Increasing Numbers of Fishing Visitors to Mackay Region

- Under a medium scenario, grow Mackay region's share of Queensland's fishing visitors from 2.4% to 3.6% - in 2022, this will mean approximately 30,000 new visitors who will generate \$49m in additional visitor expenditure.

Grow average length of stay of leisure visitors to Mackay Region

- Increased promotion and range of fishing opportunities will be used to drive increased length of stay (and the resulting expenditure opportunities) in the Mackay region. Growing the average length of stay of 10% of Mackay's overnight leisure visitors by 0.5 days (from 3.5 to 4 days) will generate an additional \$26m in expenditure in 2022.

Please see appendix 3 for further details on the modelling of these forecasts.

Increased recognition of the Mackay Region as a premier fishing destination

Instigate an annual survey to test awareness and perception of Mackay region as fishing destination.

- Based on year 1 survey results as a benchmark, seek to grow positive feedback by 5% year on year over the term of the strategy.

Reduction in the numbers of non-compliance reports for recreational fishing in the Mackay Region

In partnership with DAF, GBRMPA and the Queensland Boating and Fishing Patrol, agree on a shared set of compliance data.

- Utilising 2017 as a benchmark, set a target of 5% year on year improvement on performance over the term of the strategy.

Improved species and habitat health in the Mackay Region's water

In partnership with DAF, the recreational fishing sector and other partners, identify and report on a shared set of measures covering; fish size and stock levels, and water quality.

- Measures established in 2017/18 and updated annually (or as appropriate to data set).

5. ACTIONS TO ACHIEVE OUR OBJECTIVES



5.1 Action Areas

A series of prioritised actions have been suggested to deliver the Strategy's vision and objectives under the themes of;

- Ecology and Fisheries Management
- Recreational Fishing Infrastructure
- Business and Product Development
- Marketing and Positioning
- Enabling Partnerships

Actions have been categorised on the following basis;

Timing	
Short-term:	• Years 1 and 2 (2017/18 to 2018/19)
Medium-term:	• Years 3 and 4 (2019/20 to 2020/21)
Longer-term:	• Year 5+ (2021/22 onwards)
Ongoing:	• Ongoing throughout the strategy term



5.2.1 Ecology and Fisheries Management

Ecology and Fisheries Management

The sustainability and health of fish stocks and freshwater/marine habitats are at the heart of our strategy – there is no recreational fishing opportunity without healthy fish stocks. In this regard, the introduction of the Net Free Zone has been a huge boost to the Mackay region. Initial evidence suggests that the zone is having a tangible and rapidly growing impact on fish numbers and size. Our key attractor as a fishing destination is the offer to visitors of a great day or days’ fishing.

Understanding, Awareness and Compliance

Compliance with recreational fishing regulations is a key issue for consideration. Queensland Boating and Fishing Patrol officers report ongoing compliance issues, albeit the concerns are not unique to the Mackay region. It is thought that large part of the issue is based around lack of understanding of the regulations and species. Measures to build compliance are therefore a priority, including; improved information provision and education.

To support formal compliance regulations and programs such as GBRMPA’s Reef Guardians initiative, it is recommended that a recreational fishing code of conduct be introduced, supported by a program of measures which grow awareness and understanding. The code of practice can also play a role in the positioning of Mackay as a fishing destination, helping differentiate it from other places.

Effective monitoring and measurement of habitat and fish health is essential, providing the necessary information for ongoing management actions. Partnerships between Council, Department of Agriculture and Fisheries (DAF) and the Recreational Fishing Sector will be beneficial with regard to monitoring.



Building Species and Habitat Sustainability

While introduction of the Net Free Zone has already provided a significant boost, other measures to help build longer term species and habitat sustainability are also necessary.

Improvements to fish habitats in identified locations, and tackling physical barriers which interrupt fish spawning and life cycles are priorities.

Development of a series of themed 'fish hotels' with distinct and marketable stories in the region's dams offers potential as a type of measure which can improve habitats. With appropriate development, they also have the potential to act as marketing/ profile raising tools. As part of the above-water parts of these structures, well designed landmarks or markers can act as starting points for new fishing visitors to the region (ideal spots to catch fish) as well as providing 'Facebook moment' opportunities for marketing and social media activities.

Stocking of impoundments is also a key consideration. The Stocked Impoundment Permit Scheme (SIPS) provides support for fish stocking however, innovative means of funding such as crowdsourcing could also be considered. Should the current jungle perch trial be successful, introduction of this species would provide a valuable new fishing opportunity – this type of one off program would be a good example of a high profile initiative which may be well suited to crowdsourcing.

Which partners need to be involved?

- Department of Agriculture and Fisheries (DAF)
- Mackay Regional Council (MRC)
- Catchment Solutions (CS)
- Great Barrier Reef Marine Park Authority (GBRMPA)
- Recreational Fishing Sector (RFS)
- Mackay Area Fish Stocking Association (MAFSA)
- Department of Natural Resources and Mines (DNRM)
- Mackay Tourism (MT).

Action Areas

Actions are recommended under the following topic headings;

- 1.1 Information and Education
- 1.2 Fish Barriers and Habitat Management
- 1.3 Fish Stocking
- 1.4 Strategic Management

1. Ecology and Fisheries Management

Action	Lead Agencies	Partners	Timeframe
1.1 Information and Education			
1.1.1 Introduce a new Voluntary Code of Conduct for recreational fishing, across all of Queensland's Net Free Zones	RFS	Partners in other QLD Net Free Zones	Short term - 2017/18 to 2018/19
1.1.2 Integrate information on the Voluntary Code of Conduct, compliance measures and good fishing practice into information made available to fishing visitors via a range of media (digital, paper-based, interpretation/signposting)	RFS	MRC, MT	Short term - 2017/18 to 2018/19
1.1.3 Support existing education and good practice initiatives including; Reef Guardian Schools program, MAFSA's tagging program, and opportunities for the introduction of new/ extended schools programs at accessible destinations such as the Gooseponds, and Wetland walkabout monitoring (GBRMPA)	GBRMPA	MRC, MAFSA, RFS	Ongoing – 2017/18 to 2021/22
1.2 Fish Barriers and Habitat Management			
1.2.1 Investigate potential opportunities with Sunwater to reinstate the Dumbleton Weir Fish Lock	Sunwater, Reef Catchments	MRC	Short term - 2017/18 to 2018/19
1.2.2 Investigate opportunities for habitat enhancement at Kinchant Dam	DAF	MRC	Medium term - 2019/20 to 2020/21
1.2.3 Investigate the feasibility of developing a series of 'fish hotels' in the region's dams; measures which improve fish habitat and act as marketing/ PR tools	MRC	Sunwater	Medium term - 2019/20 to 2020/21
1.2.4 Consider the introduction of a new crowdsourcing initiative to support fish stocking (example https://fundsforfish.com.au/projects/glenelg-hopkins-cma/)	MAFSA		Medium term - 2019/20 to 2020/21
1.2.5 Continue to work in partnership identifying resources to implement the fish barrier removal program as identified by Catchment Solutions in the 2015 study http://reefcatchments.com.au/files/2016/10/Mackay-Whitsunday-Fish-Barrier-Prioritisation-Report.pdf	Reef Catchments	DNRM, DAF, MRC	Ongoing – 2017/18 to 2021/22

1.2.6	Support ongoing programs to manage/eradicate invasive flora and fauna i.e. hymenacne, tilapia	DAF	All partners	Ongoing – 2017/18 to 2021/22
1.3 Fish Stocking				
2.3.1	Continue to support the Jungle Perch restocking initiative, with the aim of establishing jungle perch as a new recreational fishing species	DAF	MAFSA, MRC	Medium term - 2019/20 to 2020/21
2.3.2	Investigate opportunities to support the sustainability of stocked impoundments	MAFSA, Sunwater, MRC		Longer term - 2021/22 onwards
2.3.3	Seek funding for a project to re-oxygenate the Gooseponds – upstream to downstream	MRC, Reef Catchments		Longer term - 2021/22 onwards
2.3.4	Investigate solutions for containing barramundi within dams during high flow situations	MAFSA	Sunwater, MRC	Ongoing – 2017/18 to 2021/22
2.4 Strategic Management				
2.4.1	Prepare an overall fisheries management plan, potentially based around a wider area encompassing the Mackay, Isaac and Whitsundays council areas	DAF	Councils, rec fishing sector	Longer term - 2021/22 onwards
2.4.2	Use planning instruments (regional planning framework, environmental offsets etc) to support maintenance and enhancement of marine environments	MRC		Ongoing – 2017/18 to 2021/22

5.2.2 Recreational Fishing Infrastructure

Recreational Fishing Infrastructure

Recreational fishing infrastructure as a whole is of a good standard. The facilities as they currently stand are not an immediate barrier to securing further economic benefits from fishing visitors, however, investment in new and upgraded facilities will be required to meet anticipated demand.

A number of challenges are apparent;

- Growing demand in the Net Free Zone is anticipated – local and visitor demand, placing pressure on ramps and parking capacity
- Outside the core fishing community, limited awareness of the Net Free Zone (no signposting at present)
- Increasing expectations of support infrastructure at boat ramps i.e. information, toilets, BBQs etc
- The high tidal range presents access challenges in that all-tide or near all-tide ramps are not feasible in all locations, and management of siltation is an ongoing issue
- Some instances of vehicle damage and theft occurring at a number of sites
- Information available to visitors at many boat ramps is relatively limited
- Visitor infrastructure requirements such as secure storage for boats and equipment when visiting the region.

With regard to key individual boat ramps and sites;

- Mackay Harbour is a key access point, however expansion opportunities are limited. North Queensland Bulk Ports Corporation is not able to support car park expansion at the Mackay Marina on vacant port land nearby. The ideal car parking location on a vacant site close to Wharf 1 is currently used for break bulk cargo, and will also be utilised to commence a container trade in the medium term. In addition, the proposed site is adjacent to fuel storage tanks and the location of a new community use in this area would not achieve acceptable planning outcomes.
- Hay Point boat ramp is a well-used facility however it is situated in the middle of the busy tug harbour. There is potential for conflict between recreational users of the boat ramp, the movement of tugs, and the periodic activities of barges associated with port expansion, especially if recreational demand and shipping movements both continue to grow.
- The Old Hospital Bridge fishing platform in West Mackay was damaged during Tropical Cyclone Debbie. This platform is a popular land-based fishing platform and served a valuable function given its central location and accessible nature.
- Teemurra, Kinchant and Eungella Dams are all popular inland fishing destinations – demand is increasing for support facilities (including camping at Teemurra).

Approach/ Strategy

The recommended approach to enhancing infrastructure recognises need and demand across the entire region. However the focus at this point in time is based around meeting the anticipated increases in demand in the Net Free Zone.

A rolling investment program is proposed to ensure that the region's facilities meet the identified need. Given capacity constraints at the harbour, increasing recreational fishing demand would be best

managed by building capacity at other Net Free Zone locations where cost-effective solutions can be identified.

A number of principles will guide action and investment;

- A series of priority upgrades are identified however development will be dependent on resources being secured. The approach taken recognises the need for a close working relationship between Council and TMR. A practical approach is required - for instance, while user demand may create a clear case for a new or upgraded boat ramp, the associated costs in terms of; maintenance costs, road access and providing for sufficient parking may be prohibitive
- Prioritisation of infrastructure upgrades does not identify a formal hierarchy of sites however the importance of access points at the Harbour, in the Net Free Zone and at the region's Dams are readily apparent. Victor Creek is particularly valuable from a tourism perspective in that it has excellent existing infrastructure and is situated in close proximity to existing tourism assets
- Considerations applied in this site prioritisation include;
 - Existing demand - boat ramp movements
 - Growing recreational fishing demand in the Net Free Zone
 - Access
 - Community/ recreational fishing sector feedback
 - Proximity to existing tourism infrastructure – accommodation etc
 - Opportunity to provide safe/secure storage for boats.

Which partners need to be involved?

- Department of Agriculture and Fisheries (DAF)
- Department of Transport and Main Roads (TMR)
- Mackay Regional Council (MRC)
- Recreational Fishing Sector (RFS)
- Department of Natural Resources and Mines (DNRM)
- North Queensland Bulk Ports Corporation (NQBPC)
- Department of State Development (DSD)
- Mackay Tourism (MT).

Action Areas

Actions are recommended under the following topic headings;

- 2.1 Prioritising Recreational Fishing Infrastructure Enhancement - primary infrastructure
- 2.2 Prioritising Recreational Fishing Infrastructure Enhancement - support infrastructure
- 2.3 Visitor Infrastructure
- 2.4 Longer-term Strategic Development Opportunities.

2. Recreational Fishing Infrastructure

Action	Lead Agencies	Partners	Timeframe
2.1 Prioritising Recreational Fishing Infrastructure Enhancement - primary infrastructure			
2.1.1 Assess requirements for infrastructure upgrades following demand assessment and needs analysis. The following locations have been identified as initial priorities, focusing on providing for the anticipated increased demand in the Net Free Zone; <ul style="list-style-type: none"> • Murray Creek - ramp lane and additional capacity • Constant Creek – additional parking capacity • Port Binnli, Mackay Harbour - additional floating walkway installation • Halliday Bay – formalised car park • Slade Point – ramp and car park • Campwin Beach upgrades • Remedial and enhancement works for key sites impacted by Tropical Cyclone Debbie 	TMR, MRC, NQBPC	Other site owners (where appropriate)	Ongoing – 2017/18 to 2021/22
2.2 Prioritising Recreational Fishing Infrastructure Enhancement - support infrastructure			
2.2.1 Establish and implement a strategic signposting program incorporating destination welcome and Net Free Zone signage (at access points in the NFZ). Consider “Mackay Fishing Haven – a Queensland Net Free Zone” as a lead message	MRC, TMR	RFS	Short term - 2017/18 to 2018/19
2.2.2 Continue to monitor and report security at the region’s key fishing sites, to inform the introduction of mitigation measures where appropriate and cost-effective	RFS	MRC	Short term - 2017/18 to 2018/19
2.2.3 Investigate the opportunity to establish working protocols between TMR and Council to ensure smooth implementation of new infrastructure, with where appropriate, Council providing a conduit for community input	MRC, TMR		Short term - 2017/18 to 2018/19
2.2.4 Investigate opportunities to establish land-based fishing platforms in accessible locations, providing opportunities for visitors with varying accessibility requirements. Priorities include; <ul style="list-style-type: none"> • Gooseponds provides an initial site opportunity • Old Hospital Bridge Fishing Platform (remedial works post-cyclone) 	MRC		Ongoing – 2017/18 to 2021/22

2.2.5	Flooding and tidal surges are a reality on the Mackay coastline – integrate flood-ready design into new recreational fishing infrastructure where appropriate	TMR, MRC		Ongoing – 2017/18 to 2021/22
2.2.6	Parking constraints at Mackay Harbour and potential safety issues arising from conflicting uses at Hay Point ramp may lead to capacity constraints as recreational fishing demand in the Net Free Zone grows. Investigate options with NQBPC for longer-term access solutions at alternative locations	MRC, NQBPC		Ongoing – 2017/18 to 2021/22
2.2.7	As the basis for investment decisions, prioritise support for new infrastructure and maintenance (BBQ, Toilets, information, lighting etc) at the region’s main fishing sites – these include; Mackay Harbour, River Street, Sarina Beach, Victor Creek, Campwin Beach, Murray Creek, Sarina, Eungella, Kinchant and Teemburra Dams	MRC, TMR, Sunwater	Local progress associations	Ongoing – 2017/18 to 2021/22
2.2.8	The high tidal range and resulting siltation provides an ongoing management challenge for Council, including the Murray Creek and Rocky Creek Dam sites; <ul style="list-style-type: none"> Investigate an opportunity for the Rural Fire Brigade to test facilities on ramps after high tide Review management options when the maintenance contract is next up for review 	MRC	Traditional Owners, Rural Fire Brigade, TMR	Ongoing – 2017/18 to 2021/22
2.3 Visitor Infrastructure				
2.3.1	Investigate partnership opportunities regarding development of accommodation and other amenities at Kinchant, Teemburra and Eungella Dams; <ul style="list-style-type: none"> Camping opportunities at Teemburra 	Sunwater, MRC	private sector	Short term - 2017/18 to 2018/19
2.3.2	Explore opportunities with accommodation businesses and other partners to provide safe storage for boats and other fishing equipment	MRC, MT, private sector		Short term - 2017/18 to 2018/19
2.4 Longer-term Strategic Development Opportunities				
2.4.1	The proposed PDA in Mackay offers opportunities to consider activation of the river-front for leisure and recreational purposes. While acknowledging the challenges of the high tidal range, infrastructure which provides for a high standard of access to the river should actively be considered.	MRC	DSD	Longer term - 2021/22 onwards

5.2.3 Business and Product Development

Business and Product Development

Research has shown that fishing is a popular activity for Mackay communities and visitors, however to ensure that the region benefits economically, a broader range of commercial partners need to be involved.

While the region is well set up for the core fishing market, additional business and product development is necessary to release the potential of the broader holiday and leisure market - tourism agencies need 'things to sell' or services/experiences which broader marketing can be based around.

The region needs to make it easier for the large holiday and leisure market to take part of the wide range of fishing opportunities available - this means services such as charter boats, guided fishing, tours, equipment hire, related nature based and adventure activity options etc.

With the enhanced profile that being recognised as a premier fishing destination brings, it is felt that good opportunities for growth in the broader leisure market will be available - the initial priority is to promote awareness of opportunities and seek appropriate new business investment.

Many of the conditions necessary to attract investors are now in place; including;

- Significant scale of existing market
- Addition of the Net Free Zone and the promise of increasingly healthy fish stocks and habitats
- Growing momentum for North Queensland as a recreational fishing hub
- A committed group of partners - local government, tourism agencies and businesses, recreational fishing groups.

From a tourism perspective, indigenous experiences linked to fishing also offer valuable opportunities. Further work can also be done to complement existing information and itineraries which help make it easy for visitors to enjoy the region.

Which partners need to be involved?

- Mackay Regional Council (MRC)
- Recreational Fishing Sector (RFS)
- Department of State Development (DSD)
- Mackay Tourism (MT)
- Tourism and Events Queensland (TEQ)
- Traditional Owners Reference Group (TORG)
- Greater Whitsunday Alliance (GW3)

Action Areas

Actions are recommended under the following topic headings;

- 3.1 Promotion of new business opportunities
- 3.2 Business support and development.

3. Business and Product Development

Action	Lead Agencies	Partners	Timeframe
3.1 Promotion of new business opportunities			
3.1.1 Prepare a business prospectus highlighting business investment opportunities, including; <ul style="list-style-type: none"> • Charter boat operations • Guiding • Tours • Equipment hire 	MRC	GW3	Short term - 2017/18 to 2018/19
3.1.2 Raise awareness of packaging and service opportunities in the recreational fishing sector with existing operators (including hoteliers)	MT	private sector	Short term - 2017/18 to 2018/19
3.2 Business support and development			
3.2.1 Provide dedicated support to help bring new experiences and services to market, including; indigenous guiding (Black's Beach Spit)	MRC, MT	TEQ, private sector, TORG	Short term - 2017/18 to 2018/19
3.2.2 Seek funding to establish a new visitor experience development program for new and existing businesses	MT, MRC	private sector	Medium term - 2019/20 to 2020/21
3.2.3 Development of new or extended visitor itineraries which highlight fishing and related visitor experiences	MT		Medium term - 2019/20 to 2020/21

5.2.4 Marketing and Positioning

Marketing and Positioning

Research suggests three distinct fishing markets;

1. **The core fishing market** – those whose primary purpose of a trip is to fish. This group can be from local, regional or international origins. They will usually bring their own gear and be knowledgeable about sites and species. They are most likely to be influenced to choose the region for a fishing trip via either word of mouth or specialist fishing media (blogs, fishing publications, high profile professional events etc). The trigger is often the hope of catching a particular species or to take part in a competition.
2. **The holiday/leisure market** where fishing is unlikely to be the primary purpose of the trip, but individuals may be interested in a day's fishing as part of the overall trip. The region's core holiday market is within a 4 hr drive distance - touring trips, short breaks and visiting friends and relatives. This group may or may not bring fishing gear with them and level of fishing knowledge may be more limited. 'Making it easy' is crucial for this market – this means; information about where to go and what to do, hire of equipment, suggested itineraries etc. The whole party or family may not be interested in fishing; therefore considerations in servicing this market will need to include providing accessible options for alternative activities.
3. **Local children and education groups.** Fishing is a popular activity among local communities. Fishing and its marine and freshwater environments are also tied closely to education and key curriculum topics, particularly the overarching sustainability theme. There is an opportunity to more closely align fishing spots (such as the Gooseponds) and existing education programs to build activity in this sector. In the long-term, getting local children involved in fishing and helping them gain a good understanding of environmental challenges will help create passionate new ambassadors for fishing in Mackay.



Marketing Approach and Strategy

Actions to build awareness of the Mackay region as a premier recreational fishing destination and drive visitation are key components of the Strategy. Key considerations in the recommended approach include;

1. Activity should be guided by a **strategic marketing plan**, supported with dedicated resources.
2. **Establishing a clear and differentiated positioning** is an important basis for the development of a marketing plan. Hero and signature experiences which are synonymous with the Mackay region will need to be established – these experiences should build in aspects such as personal stories and characters, and indigenous heritage as well as core fishing attributes such as fish species and fishing locations. The environmental rationale behind the designation of the Net Free Zone and strong sustainability story in the Great Barrier Reef region also provides a strong storyline for Mackay region to adopt. Success at the end of the five year strategy period would be businesses embracing this positioning and reflecting it in their individual marketing, services and experiences.
3. Initial **focus should be placed on the core fishing market** - this group of visitors are already coming to the Mackay region. As the Net Free Zone continues to have a positive impact on fish stocks, good growth opportunities are available. The co-ordinated use of specialist fishing press and media and high profile professional events are two of the key avenues that need to be pursued.
4. The broader **leisure market is best developed over the course of the strategy**. While growing market awareness can and should be pursued straight away, an initial focus needs to be placed on new product development to boost our overall leisure fishing offer. This will provide the necessary basis (depth and range of experiences) for marketing investment to deliver maximum returns. Partnership options with surrounding regions to grow awareness of North Queensland and the Mackay-Isaac-Whitsundays as fishing hubs also offers potential as part of the strategy for this market.
5. A focus should be placed on **improved information provision and interpretation**, using a range of digital and traditional media. While ‘secret’ fishing spots known to locals is a characteristic of most fishing destinations, more needs to be done to build knowledge of the region’s fishing opportunities – this applies to the core fishing market and broader leisure market. For the leisure market, the principle of ‘making it easy’ extends to tools such as itineraries and packages.



Which partners need to be involved?

- Mackay Tourism (MT)
- Mackay Regional Council (MRC)
- Mackay recreational fishing sector
- Tourism and Events Queensland (TEQ)
- Mackay Recreational Fishing Steering Group.

Action Areas

Actions are recommended under the following topic headings;

- 4.1 Marketing strategy
- 4.2 Delivery of a 5 year program of consumer and trade focused activity
- 4.3 Investment in attracting high profile fishing events to the region



4. Marketing and Positioning

Action	Lead Agencies	Partners	Timeframe
4.1 Marketing Strategy			
4.1.1 Develop and agree Mackay's positioning as a recreational fishing destination	MT, MRC, RFS, MAFSA		Short term - 2017/18 to 2018/19
4.1.2 Establish and implement a 5 year tourism marketing program for the recreational fishing sector	MT	MRC, TEQ	Short term - 2017/18 to 2018/19
4.2 Delivery of a 5 year program of consumer and trade focused activity			
4.2.1 Create an event or press-worthy development to mark barramundi season-opening, with the intention of generating media, trade and consumer attention	MRC, MT	RFS, MAFSA	Short term - 2017/18 to 2018/19
4.2.3 Instigate a targeted marketing program, targeting the core fishing market – considerations may include; establishing a central web-based information resource and co-ordinated social media program	MT	RFS, MRC, MAFSA	Short term - 2017/18 to 2018/19
4.2.4 Develop a program of fishing-themed itineraries to be incorporated into mainstream tourism marketing	MT		Short term - 2017/18 to 2018/19
4.2.5 Develop a new fishing in Mackay booklet/ app as a means of providing a comprehensive guide to fishing opportunities	MT	MRC, RFS, MAFSA	Medium term - 2019/20 to 2020/21
4.2.6 With private sector partners, investigate the development of Mackay Fishing packs – ready to go lures and information packs	Private Sector, MT	MRC, RFS, MAFSA	Medium term - 2019/20 to 2020/21
4.3 Investment in attracting high profile fishing events to the region			
4.3.1 Target the attraction of high profile international fishing events to Mackay as a means of generating economic return and growing market awareness	MRC	GW3, fishing industry partners	Short term - 2017/18 to 2018/19

5.2.5 Enabling Partnerships

Enabling Partnerships

The raw product - in the form of varied waterways and coastline, and range of fish species that will enable Mackay to become a leading fishing destination is already in place. However, resources and effective partnerships (existing and new) are necessary to help deliver their potential.

Which partners need to be involved?

- Mackay Regional Council (MRC)
- Recreational Fishing Sector (RFS)
- Mackay Area Fish Stocking Association (MAFSA)
- Mackay Recreational Fishing Steering Group (MRFSG)
- Mackay Tourism (MT)
- Tourism and Events Queensland (TEQ)
- Traditional Owners Reference Group (TORG)
- Greater Whitsunday Alliance (GW3)
- Department of Agriculture and Fisheries (DAF)
- Department of Transport and Main Roads (TMR)
- Catchment Solutions (CS)
- Reef Catchments (RC)
- Sunwater (SW)
- Great Barrier Reef Marine Park Authority (GBRMPA)

Action Areas

Actions are recommended under the following topic headings;

- 5.1 Partnership development

5. Enabling Partnerships

Action	Lead Agencies	Partners	Timeframe
5.1 Partnership development			
5.1.1 Establish a Mackay Recreational Fishing Steering Group to 'own' and guide delivery of the Strategy. Membership should be representative of the diverse range of partners, including private, public and community representatives	MRC	All	Short term - 2017/18 to 2018/19 and Ongoing to 2021/22
5.1.2 Establish a monitoring program to provide for effective monitoring of the Strategy's actions and goals	MRC	All	Short term - 2017/18 to 2018/19
5.1.3 Investigate opportunities to establish a North Queensland fishing partnership to lead positioning of the wider region as Australia's premier fishing destination	MT, MRC	regional tourism organisations, GW3	Short term - 2017/18 to 2018/19
5.1.4 Establish a habitat and fish-stocks monitoring partnership, with the end goal of establishing shared data sets and goals	DAF, MRC, MAFSA	ALL	Short term - 2017/18 to 2018/19
5.1.5 The Mackay Recreational Fishing Steering Group will assume responsibility for identifying resources to implement the Strategy. Recreational fishing has an ability to contribute to a wide range of policy agendas, including education, accessibility, conservation, environment, sport and recreation, marketing and events, tourism and business development - external funding opportunities may potentially be available in these areas to support elements of Strategy implementation	MRFG	ALL	Ongoing – 2017/18 to 2021/22
5.1.6 Ongoing liaison and partnership between Council and TMR to ensure alignment of infrastructure investment priorities	TMR, MRC		Ongoing – 2017/18 to 2021/22

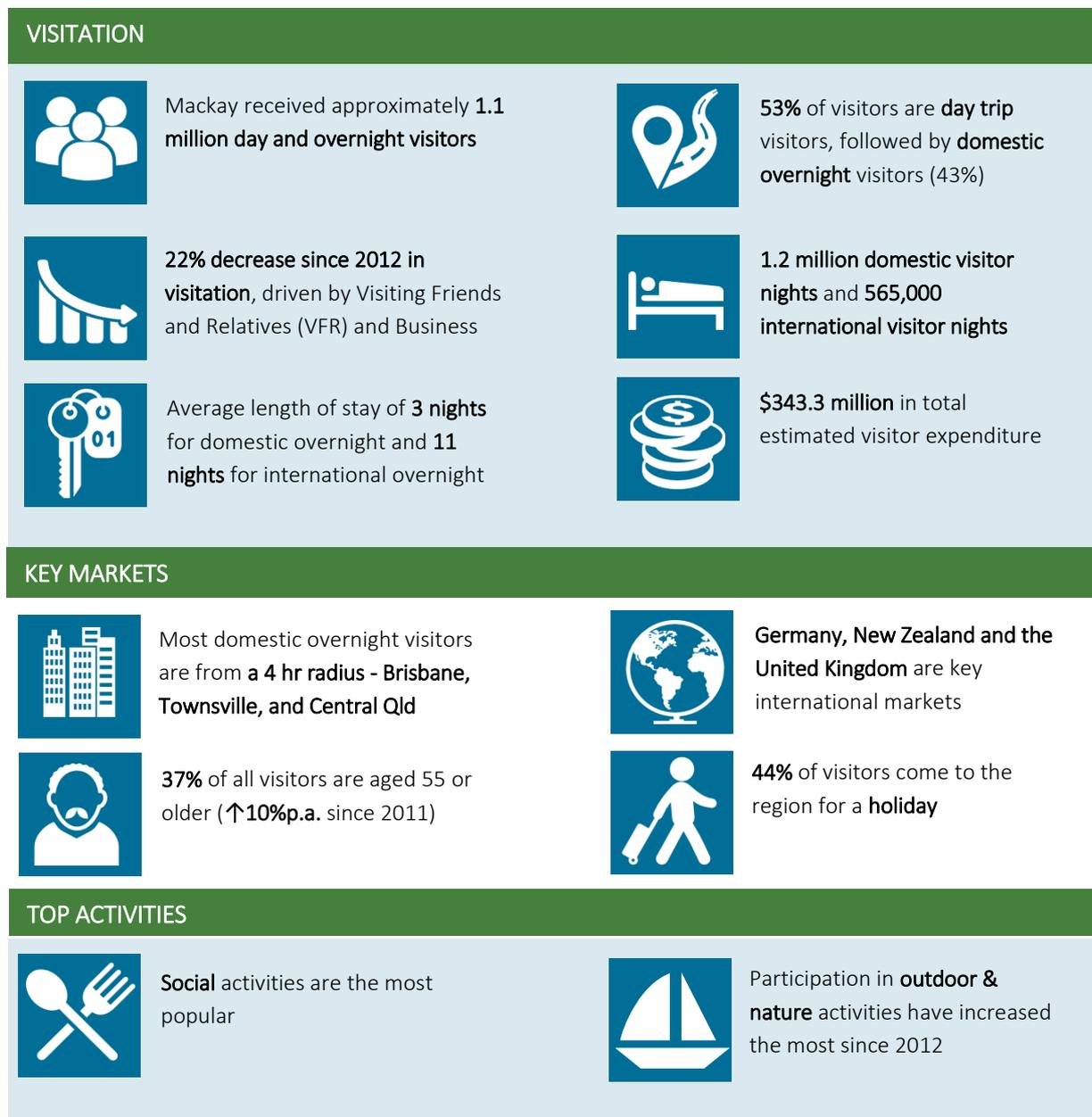
Appendices



Appendix 1: Mackay Region Visitor Profile

The following section provides an overview of the latest available key visitor trends in the Mackay Region, sourced from the National and International Visitor Survey data (for the year ending September 2016) from Tourism Research Australia.

Figure A: Mackay Region (LGA), Visitor Snapshot, September 2016



Visitation Growth and Market Share

In 2016, Mackay Region received approximately 992,000 visitors, of which 52% were domestic day visitors, 44% were domestic overnight visitors and 4% were international visitors. These domestic day visitors declined by 8% per annum (p.a.) since 2012, while domestic overnight visitors (NVS O/N) has declined by -2% p.a. and international (IVS) have remained stable.

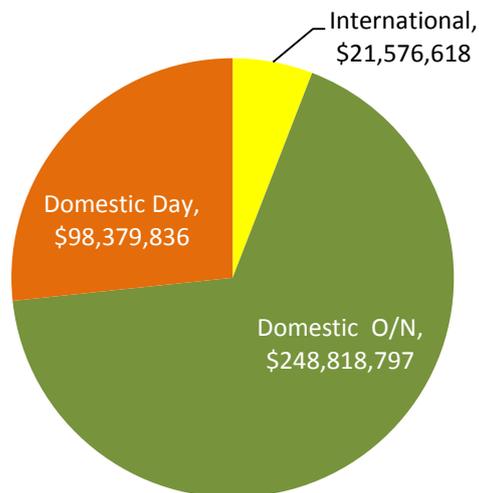
Figure B: Total Mackay Region Visitor numbers, YE September 2016

Total Visitors to Mackay	2016
International	39,125
Domestic O/N	438,307
Domestic Day	514,297
Total Visitors	991,729

Expenditure:

On average, domestic day visitors spent \$191 on their trip, while international visitors spent almost a quarter of this at \$52 per night, and domestic overnight visitors spent \$179 per night, contributing a total of over \$368 million in visitor expenditure to the region. Although domestic day visitors make up 52% of all visitation to Mackay, they contribute around 27% of visitor expenditure. In comparison, international visitors contribute 6% of all expenditure, regardless of their low shares in visitors market (4% of all visitors). Domestic overnight visitors, however, contribute the largest proportion of overall visitor expenditure, which was approximately 61%.

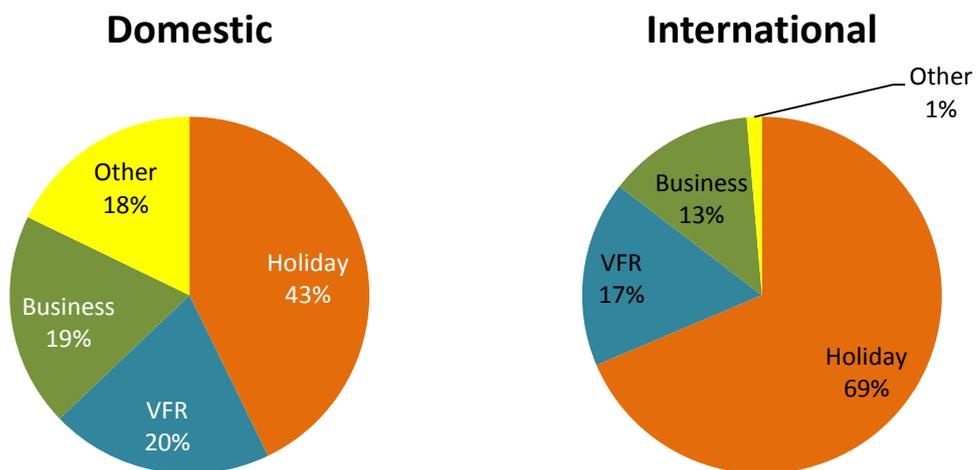
Figure C: Total Expenditure for Mackay Region, YE September 2016



Purpose of Visit:

The main purpose of visit to the Mackay Region by domestic visitors in 2016 was for a holiday (43%), followed by visiting friends and relatives (VFR) (20%). For international visitors the main purpose was similarly holiday (69%) followed by Business.

Figure D: Main Purpose of visit to Mackay Region by international and domestic visitors, YE Sept 2016



Visitor Origins:

The majority of international visitors to the region were from Germany (18%) and New Zealand (16%), followed by then United Kingdom (11%). The majority of domestic visitors to the region were from Brisbane (17%) then Townsville region (13%), followed by Central Queensland and Mackay (both 12% shares).

Figure E: Top 3 visitor origins for Mackay Region, YE September 2016

Top 3 International Visitor Origins		Top 3 Domestic Visitor Origins	
1. Germany	18%	1. Brisbane	17%
2. New Zealand	16%	2. Townsville	13%
3. United Kingdom	11%	3. Central QLD / Mackay	12%

Appendix 2: Key Agencies/Organisations Consulted in Preparing the Strategy

- Catchment Solutions
- Great Barrier Reef Marine Park Authority
- Mackay Area Fish Stocking Association
- Recreational Fishing Sector
- Mackay Tourism
- North Queensland Bulk Ports
- Queensland Government: Boating and Fisheries Patrol
- Queensland Government: Department of Agriculture and Fisheries
- Queensland Government: Department of Transport and Main Roads
- Reef Catchments
- Seaforth Progress Association
- St Helens Beach Progress Association
- Sunwater
- Tourism and Events Queensland
- World Wildlife Foundation

Appendix 3: Visitation and Expenditure Targets

Figure F: Summary of Mackay Region Fishing Visitor Scenario Goals

SCENARIO	AIM	VISITORS IN 2022	TOTAL EXPENDITURE IN 2022	ADDITIONAL EXPENDITURE SINCE 2016
LOW	The business as normal option - grow at the standard national forecasts for tourism (determined by the Tourism Forecasting Committee)	Additional 12,000 fishing visitors in 2022 above current (2016) figures	\$38.4 Million	\$14.1 Million
MEDIUM	Grow Mackay's share of Queensland's fishing visitors from 2.4% to 3.6%	Additional 42,000 visitors in 2022 above current (2016) figures	\$48.6 Million	\$24.3 million
HIGH	Grow Mackay's current share of Queensland's fishing visitors from 2.4% to 5%	Additional 77,000 visitors in 2022 above current (2016) figures	\$62.8 Million	\$38.5 million

