Shute Harbour Marina Demand Study



Shute Harbour Marina Developments Pty Ltd

August 2006

ABN 99 633 494 331

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EXECUTIVE SUMMARY

Background

In May 2005, *Shute Harbour Marina Developments Pty Ltd (SH Developments)* submitted an EIS to the Queensland Coordinator General's Department for a proposed mixed use marina/ commercial/ industrial/residential development project at Shute Harbour in the *Whitsundays*. Following receipt and assessment of this submission, the Coordinator General requested further information. *SH Developments* has modified the project in light of this request and now proposes a variation that will overcome objections by limiting the project to:

- Marina;
- Resort Hotel; and
- Residential precinct.

To support this amended proposal and address the information required a new EIS has been commissioned by *SH Developments.* This demand study to will provide information for that process on:

- Need/demand for a new marina;
- Need/demand for the resort/hotel; and
- Need/demand for residential development.

Boat Registration Growth

Growth in Queensland boat registrations was 5.3 percent for 2004/05, more than twice the growth in population (2.2 percent). For the current year up to the end of April, growth has been 4.1 percent and if the trend continues will be 4.9 percent.

According to Queensland Transport, growth in boat registrations in the WHAM region (6.3 percent for 2004/05 and 5.7 percent to April 2006) was higher than that for Queensland.

Trends in boat registrations

Based on current growth, it is forecast that boat registrations in Queensland will reach 247,500 (+53,536 or +27.6 percent on 2005) by 2010 and 403,000 (+ 209,036 or +107.8 percent) by 2020.

For the WHAM region the comparable forecast is 22,050 (+5,956 or +37 percent) by 2010 and 41,391 (+25,297 or +157 percent) by 2020. This forecast suggests the WHAM region will harbour just over 10 percent of all Queensland boat registrations by 2020.

Marina and Berth Numbers

Within the WHAM region there are six marinas with a total capacity of 1,384 wet berths and 75 dry berths as summarised in the following table. Most were either occupied, or set aside for visitors. Several of the marinas reported expansion plans for the future, the details of which are also included.

Table 1: Existing & Proposed Marina Capacities

Marina	Existing Berths		Proposed Berths		Total berths	
	Wet	Dry	Wet	Dry	Wet	Dry
Mackay Reef Village	328	0	156	200	484	200
Laguna Whitsundays	110	0	500	0	610	0
Abel Point	500	0	0	0	500	0

Hamilton Island	220	35	200	35	420	70
Bowen	200	0	600	0	800	0
Hayman Island	26	0	0	0	26	0
TOTAL	1,384	35	1,456	235	2,840	270

Source: Pacific Southwest Strategy Group, 2006.

The above table shows that the capacity of the existing WHAM region marinas is proposed to increase by 119 percent.

The *Boating Industry Association Queensland* advised that there was a total waiting list of 1,480 for marina berths in Queensland based on a study done in January 2005 as follows:

- 795 waiting to purchase; and
- 685 wanting to lease.

Market Supply

Two models for marina berth demand were undertaken by the project team:

- Model 1 - likely demand based on forecast growth in boat registrations of 6.5 precent per annum; and
- Model 2 - conservative model based on growth in boat registrations equal to forecast population growth (1.7 percent per annum).

Assuming that demand for berths is proportional to total boat registration numbers, then the growth for marina berths will increase by similar percentages to the forecast boat registration. Using the current supply of berths and moorings in the WHAM region as a base figure, projections for demand in 2010 and 2020 were made.

Table 2: Marina Demand Models

WHAM Region Total Berths	Base (2005)	Model 1 (6.3% growth pa)		Model 2 (1.7% growth pa)	
		2010	2020	2010	2020
Wet berths (1,384) [1] Dry storage (75) [1] Moorings (413) [2] Unsatisfied Demand (121) [3]	1,993	+37% or +737 Total 2,730	+157% or +3,129 Total 5,122	+8.8% or +175 Total 2,168	+28.8% or +574 Total 2,566

Notes: 1 Based on field research and site inspections by project team
2 Whitsunday Region Marina Demand Analysis 2001
3 Estimate based on Queensland figure reported by BIAQ
Source Pacific Southwest Strategy Group 2006

Based on the more likely scenario (model 1), there will need to be an additional 737 berths provided by 2010 and a further 2,392 berths (3,129 minus 737) by 2020 within the WHAM region.

Future Population

Queensland's population is forecast to reach 4,677,780 (+795,743 or +20.5%) by 2016 and 5,289,027 (+1,406,990 or +36.2 percent) by 2026.

At the same time, the population in the WHAM region is forecast to grow to 163,827 (+19,904 or +13.8 percent) and 180,974 (+37,051 or +25.7 percent) respectively

At June 2003, the Whitsunday Shire's population was 16,454 persons, of which the largest town was Cannonvale with 3,430 residents. Other population centres included Proserpine (3,347 pop.), Airlie Beach (2,375 pop.) and Hamilton Island (842 pop.).

By 2026 Whitsunday Shire's population is projected to be between 24,706 and 29,032, an increase over 2005 figures of between 41.0 and 65.7percent.

Marina Opportunities

Following on from the situation analysis the project team consulted with the local marine industry and local real estate agents. After taking into consideration the issues affecting the Queensland marine industry, the project team concluded that the Shute Harbour Marina Precinct presented opportunities in:

- Marina berths;
- Dry boat storage;
- Charter boat base;
- Time and fuel saving for Shute Harbour as a boat base for visitors to the islands, compared to Airlie Beach;
- Retail;
- Car parking; and
- Residential.

From the market research and field consultation, the project team's assessment of the WHAM marina industry concluded that there was:

- Strong demand for marina berths and dry boat storage particularly for those at competitive price points;
- Shortage of marina berths/dry storage;
- Continuing growth in boat ownership based on the high percentage of high income earners due to proximity to the coal fields; and
- Continuing trend for interstate boats to permanently locate in the region.

The market research also revealed that the Whitsundays region has:

- Sufficient supply of normal suburban residential land to cope with forecast growth; but
- Limited supply and high demand for premium residential coastal land with views or water frontage.

With the forecast regional population growth and relatively highly paid workers, increased demand for premium residential land is considered likely. Increased demand for tourist accommodation is also considered likely based on the trends for visitor numbers to the region.

Precinct Demand Model

As a result of the market research and industry opportunities discussed in the previous section, it is suggested that the major focus for the proposed precinct at Shute Harbour should be marina services, residential and resort accommodation with a consumer/retail component and have the following elements:

- Moorings and dry storage;
- Retail (resort wear, cafés and bars);
- Charter boat base
- Residential;
- Resort hotel;
- Car parking (public and secure): and
- Office and associated commercial.

Demand Summary

The following demand model was developed by the project team from industry and stakeholder consultation and provides an estimate of the demand for the various components of the proposed development.

Shute Harbour Marina Precinct demand summary:

Table 3: Marina Precinct Elements		
Element	Quantity	Justification
Marina Berths	733 In three stages	- Shortage of berths in WHAM region (estimated waiting list + 121) - by 2010 projected to be + 732 berths required - by 2020 projected to be + 3,105 berths required - 2,489 marina berths planned for WHAM region - Charter boat base - Relocation of moorings to safe waters
Dry berths	40	- Marine precinct average 38 from survey
Residential	115 lots	- Population growth and need for upmarket choices
Resort Hotel (4/4.5 star)	96 rooms	- Based on increasing occupancy of regional hotels, motels and serviced apartments

Source: Pacific Southwest Strategy Group, 2006

However, as demonstrated by the proponent at *Mackay Marina*, once a development of this type is established it may lead to further demand.

Based on current regional sales trends for waterfront property, it can be expected that it will take ten years to sell all stages of the proposed development.

For this reason, the project team suggests that a staged development should provide the following elements:

Table 4: Marina Precinct Recommended Elements		
Element	Quantity	Staging
Marina Berths	733	3 stages
Dry berths	0	
Residential	115 residential lots	5 stages
Resort Hotel (4/4.5 star)	96 rooms	

Source: Pacific Southwest Strategy Group, 2006

Richard Elliott
Chief Executive

Phillip Graham
Senior Consultant

1. QUEENSLAND MARINA INDUSTRY PROFILE

1.1 Project Background

In May 2005, *Shute Harbour Marina Developments Pty Ltd (SH Developments)* submitted an EIS to the Queensland Coordinator General's Department for a proposed mixed use marina/ commercial/ industrial/residential development project at Shute Harbour in the *Whitsundays*. Following receipt and assessment of this submission, the Coordinator General requested further information. *SH Developments* has modified the project in light of this request and now proposes a variation that will overcome objections by limiting the project to:

- Marina;
- Resort Hotel; and
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To support this amended proposal and address the information required a new EIS has been commissioned by *SH Developments.* This demand study to will provide information for that process on:

- Need/demand for a new marina;
- Need/demand for the resort/hotel; and
- Need/demand for residential development.

1.2 Existing Profile

The following profile was developed by the project team from background research (refer Appendix 1) and industry consultation.

1.2.1 Recent Population Growth

At 30 June 2005 the estimated resident population in Queensland was 3,963,968, up 75,891 on the previous year (or 1.9 percent). This followed yearly growth ranging from 1.8 to 2.4 percent in the previous four years. At the same time, the estimated resident population in the WHAM region (Whitsunday Hinterland and Mackay) was 146,080, up 2,157 on 2004 (or 1.4 percent). This followed yearly growth ranging from 0.5 to 1.8 percent in the four years prior to 2004.

1.2.2 Marina and Berth Numbers

Within the WHAM region there are six marinas with a total capacity of 1,384 wet berths, the majority of which were occupied, or set aside for visitors. Apart from Abel Point, whose prices appear to be nearly double those of other marinas in the region, all other marinas are experiencing occupancies greater than 80 percent.

A summary of the existing capacity and proposed expansion for each of the marinas follows. Full details on each marina are listed in section 2.2.

Table 5: Existing & Proposed WHAM Marina Capacities						
Marina	Existing Berths		Proposed Berths		Total berths	
	Wet	Dry	Wet	Dry	Wet	Dry
Mackay Reef Village	328	0	156	200	484	200
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TOTAL	1,384	35	1,456	235	2,840	270

Source: Pacific Southwest Strategy Group, 2006.

The above table shows that the capacity of the existing WHAM region marinas is proposed to increase by 119 percent.

1.2.3 Waiting Lists

The *Boating Industry Association Queensland* advised that there was a total waiting list of 1,480 for marina berths in Queensland based on a study done in January 2005 as follows:

- 795 waiting to purchase; and
- 685 wanting to lease.

Based on Queensland's and the WHAM region's boat ownership it is estimated that the regional waiting lists is about 121.

1.2.4 Boat Registration Growth

Growth in Queensland boat registrations was 5.3 percent for 2004/05, more than twice the growth in population (2.2 percent). For the current year up to the end of April, growth has been 4.1 percent and if the trend continues will be 4.9 percent.

According to *Queensland Transport*, growth in boat registrations in the WHAM region (6.3 percent for 2004/05 and 5.7 percent to April 2006) was higher than that for Queensland and has averaged 6.5 percent for the last five years.

1.2.5 Situation Analysis

Details of the background research and consultation with key stakeholders and industry members are included in appendix 1.

1.3 Demand

1.3.1 Population Growth

Queensland's population is forecast to reach 4,677,780 (+795,743 or +20.5%) by 2016 and 5,289,027 (+1,406,990 or +36.2 percent) by 2026.

At the same times, the population in the WHAM region is forecast to reach 163,827 (+17,747 or +12.1 percent) and 180,974 (+34,894 or +23.8percent) respectively.

1.3.2 Trends in Boat Registrations

Based on current growth, it is forecast that boat registrations in Queensland will grow to 247,500 (+53,536 or +27.6 percent on 2005) by 2010 and 403,000 (+ 209,036 or +107.8 percent) by 2020.

For the WHAM region the comparable numbers are 22,050 (+5,956 or +37 percent) by 2010 and 41,391 (+25,297 or +157 percent) by 2020. These forecasts suggest the WHAM region will have just over 10 percent of all Queensland boat registrations.

1.3.3 Marina Demand

Two models for marina berth demand were undertaken by the project team:

- Model 1 - likely demand based on forecast growth in boat registrations of 6.5 precent; per annum and
- Model 2 - conservative model based on growth in boat registrations equal to forecast population growth (1.7 percent per annum).

Assuming that demand for berths is proportional to total boat registration numbers, then the growth for marina berths will increase by similar percentages to the forecast boat registration. Using the current supply of berths and moorings in the WHAM region as a base figure, projections for demand in 2010 and 2020 were made.

Table 6: Marina Demand Models

WHAM Region Total Berths	Base (2005)	Model 1 (6.3% growth pa)		Model 2 (1.7% growth pa)	
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Wet berths (1,384) [(1)] Dry storage (75) [(1)] Moorings (413) [(2)] Unsatisfied Demand (121) [(3)]	1,993	+37% or +737 Total 2,730	+157% or +3,129 Total 5,122	+8.8% or +175 Total 2,168	+28.8% or +574 Total 2,566

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Source Pacific Southwest Strategy Group 2006

Based on the more likely scenario (model 1), there will need to be an additional 737 berths provided by 2010 and a further 2,392 berths (3,129 minus 737) by 2020 within the WHAM region.

1.3.4 Marina Supply

Existing berths and moorings in the WHAM region are as follows:

- 1,384 wet berths;
- 75 dry berths; and
- 413 moorings (figure from the *Whitsunday Region Marina Demand Analysis 2001*. Counts of moored boats in June 2006 by the project team totalled over 305).

Detailed below are the known projects for expansion of existing marina facilities, or provision of new facilities for the region.

Table 7: WHAM Region Proposed Marina Berths

Project	Additional Berths		
	Wet	Dry	TOTAL
Mackay Marina Expansion	156	200	356
Laguna Quays Expansion	500	-	500

Bowen Harbour	600	-	600
Hamilton Island	200	35	235
Port of Airlie	300	-	300
Shute Harbour	733	-	733
TOTAL	2,489	235	2,724

Source: Pacific Southwest Strategy Group, 2006.

Based on the above, there are an additional 2,724 wet and dry berths proposed for the WHAM region.

Regional demand is forecast to be for an additional 3,129 berths by 2020 suggesting that if all the projects listed are constructed there will still be a short fall of 405 berths in the region.

1.4 Typical Marina Profile

Based on the research and consultation, the project team prepared the following general profile of the *typical* WHAM marina.

Table 1: Average WHAM Marina Profile

Parameter	Typical Value
Configuration	- Provides berths in the range of nine to 30 metres - Provides dry storage for boats up to eight metres length - Amenities including, showers, toilets, - Fuelling for both diesel and petrol - Wireless internet access - Power, water to berths - Pump out facilities for waste water - Rubbish collection and recycling - Security services - Vehicle and trailer parking
Berths	- 26 - 500 wet berths (average 197)
Dry Storage	- 38 berths
Associated Industry	- Services including chandlery, provisioning, maintenance and repairs
Access to Great Barrier Reef	- Direct access
Constraints	- Environmental compliance - Shortage of skilled workers - Dredging of navigation channels - Inadequate boat ramps and public facilities - Lack of space for expansion

Source: Pacific Southwest Strategy Group, 2006, based on industry research.

Figure 1: Abel Point Marina

Source: Pacific Southwest Strategy Group, 2006.

2. LOCAL MARINA INDUSTRY

2.1. Marine Industry Consultation

To build on the state and regional data and to provide local issues, field visits with targeted locally based business operators were undertaken (refer Appendix 2).

The following is a summary of the industry consultation:

2.1.1 Marine Industry Key Stakeholders

Most of the key stakeholders contacted had little knowledge of the regional marina industry and its specific requirements outside their own immediate situation. Most respondents indicated that the marina industry would continue to grow in the WHAM region for the following reasons:

- Continued growth in boat registrations. No evidence of slowing in growth; and
- High income of regional residents who see boating as an important recreational pursuit.

On the other hand, stakeholders suggested the following issues may impede growth:

- Government red tape regarding marina development;
- Multi department approval process; and
- Ability to service vessels (Mackay first class but small, Abel Point limited expansion capacity).

Key strengths for the WHAM region marina industry were thought to be:

- Awareness of the region and its facilities;
- High level income and expenditure by the region's residents;
- Boating image of the region;
- Ideal weather for cruising;
- Island and other boating destinations;
- Well serviced;
- Strong marine industry which wants to improve; and
- Strong *Whitsundays* brand.

Relatively few weaknesses of the WHAM region marina industry were identified:

- Provision of infrastructure;
- Lack of skilled work pool which affects the level of service provided; and
- Some operators are "cowboys" offering sub-standard services.

Stakeholders thought that opportunities for new marinas existed in the *Whitsundays* especially for larger boats, but weren't sufficiently informed to have an opinion on how many berths were needed.

2.1.2 Marine Industry Business Operators/Associations

Over 70 percent of respondents thought that there was a shortage of marina berths in the WHAM region. Reasons for this included the need for affordable berths and a choice in locations.

Discussions with marina operators and the *Boating Industry Association Queensland* advised that there was a waiting list for all marina berths in Queensland (January 2005) as follows:

- 795 waiting to buy; and
- 685 waiting to lease.

It should be noted that:

- Some operators have given up keeping lists due to the demand and therefore the above figures should be considered as conservative.

Given the current rate of growth of boat registrations and the apparent shortage of berths in the WHAM region, there is an urgent need for the state government to ensure that additional supply of berths is provided.

Opportunities for new marinas were thought to exist based on:

- New age boats;
- Multi hull boats; and
- Charter boat base.

Responses regarding the number of berths required included:

- 300 berths;
- For 15 – 25 metre boats; and
- Split 35 percent multi hull and 65 percent mono hull.

Advantages of locating a marina in the WHAM region were thought to include:

- Weather;
- Access to the islands;
- Boating mecca; and
- *Whitsundays* destination profile.

On the other hand disadvantages of locating a marina in the WHAM region were thought to be:

- Infrastructure;
- Full service support;
- Finite local market;
- Access to the region;
- Limited tourist product apart from the islands; and
- Seasonality of visitation.

Constraints on the marina industry in Whitsunday Shire were thought to be:

- Council delays in approvals and decision making;
- Environmental issues in the *Great Barrier Reef Marine Park*; and
- Supporting infrastructure.

Regarding marine businesses or industries the following shortages or issues were identified:

- General coverage was available but had limited capacity;
- Professional service that delivered on time;
- Electronic repairs; and
- Service industry generally

Marina business opportunities and requirements identified for a new marina included:

- Retail precinct;
- Hire car;
- Charter boat base;
- Car parking (open);
- Car parking (secure); and
- Vehicle access to commercial berths.

2.2. Regional Marinas

Based on the response by marina operators and a search of marina websites, information on each marina was developed for the region.

Marinas included:

- Mackay Reef Marina Village;
- Laguna Whitsundays Marina;
- Abel Point Marina;
- Hamilton Island Marina;
- Bowen Marina; and
- Hayman Island.

Details for each of the marinas are given in the following sections.

2.2.1 Mackay Reef Marina

Figure 2: Mackay Reef Marina Village

Source: www.mackaymarina.com 2006

Facilities and Services:

- 328 berth marina designed for vessels with a 4.5 metre draft at LAT
- Residential village of luxury apartments and townhouses
- Commercial precinct of restaurants and shops plus a thriving Yacht Club
- Luxury four and a half star hotel, The *Clarion Hotel Mackay Marina*
- Water, 240v Power to berths
- Pump out sewerage and bilge, waste disposal
- 70 purpose-built multi-hull berths of varying size
- Six Mega Berths of 50-metre capacity
- 18 new Big Boat Berths for 35m monohull and 25m multihull
- 32 commercial fishing berths - plus one maintenance berth and three unloading berths
- Wireless internet access
- Port of Entry to Australia, AQIS on site
- Berthing for a 50m customs vessel
- Boat ramp
- Fuel wharf
- State-of-the-art boat maintenance and repair facility:
    - 65-tonne travel-lift designed to slip boats of up to 9.2m beam
    - Slipping of single, double or triple hulled vessels
    - Wet abrasive blasting
    - Specialist paint and maintenance sheds
    - 36 secure specially designed cradles
    - On site trades

Location:

- At Mackay Harbour, approximately eight kilometres from Mackay CBD
- Direct water access to the Great Barrier Reef and Pacific Ocean
- Seven kilometres to Bruce Highway
- Nine kilometres to Mackay Airport

Berths:

328 wet berths total, comprising:

Mono hull: 11 x 11m, 92 x 12m, 68 x 13.5m, 13 x 14m, 42 x 15m, 16 x 16m, 20 x 17m, 4 x 18m, 4 x 20m, 3 x 22m, 4 x 24m, 1 x 30m, 1 x 39.5m, 6 x mega

Multi hull: 2 x 11m, 7 x 12m, 2 x 12.5m, 4 x 13m, 14 x 13.5m, 1 x 14.5m, 24 x 15m, 2 x 17m, 2 x 17.5m

No dry berths.

Lease Rates:

Table 8: Mackay Reef Marina Lease Rates

Berth Size	Type	Daily	Monthly	3 Monthly	6 Monthly	Annual
9m/29.5’	Mono	$23	$500	$1,350	$2,295	$3,902
10m/32.8’	Mono/Multi	$24/30	$600/750	$1,620/2,025	$2,754/3,443	$4,682/5,854
11m/36’	Mono/Multi	$21/31	$675/775	$1,823/2,093	$3,100/3,559	$5,270/6,051
l2rn/39.4’	Mono/Multi	$28/35	$700/875	$1,890/2,363	$3,213/4,018	$5,463/6,831
13m/42.6’	Multi	$37	$925	$2,498	$4,247	$7,220
13.5m/44.3’	Mono/Multi	$31/39	$775/975	$2,093/2,633	$3,559/4,477	$6,051/7,611
14.5m/47.5’	Multi	$41	$1,025	$2,768	$4,706	$8,001
15m/49.2’	Mono/Multi	$33/43	$825/1,075	$2,228/2,903	$3,788/4,936	$6,440/8,392
16m/52.5’	Mono/Multi	$43/57	$1,075/1,425	$2,903/3,848	$4,936/6,542	$8,392/11,122
l7rn/55.8’	Mono/Multi	$47/59	$1,175/1,475	$3,173/3,983	$5,395/6,772	$9,172/11,513
17.5m/57.4’	Multi	$61	$1,525	$4,118	$7,001	$11,902
18m/59.1’	Mono	$49	$1,225	$3,308	$5,624	$9,561
20m/65.6’	Mono	$57	$1,425	$3,848	$6,542	$11,122
21m/68.9’	Mono	$60	$1,500	$4,050	$6,885	$11,705
22m/72.2’	Mono/Multi	$65/85	$1,625/2,125	$4,225/5,525	$7,183/9,393	$12,212/15,969

23m/75.4'	Mono	$69	$1,490	$3,874	$6,586	$11,197
24m/78.7'	Mono	$83	$1,660	$4,316	$7,338	$12,475
25m/81.9'	Mono/Multi	$86/112	$1,720/2,240	$4,472/5,824	$7,603/9/901	$12,926/16,832
26m/85.3'	Mono	$90	$1,800	$4,680	$7,956	$13,526
27m/88.5'	Mono	$93	$1,860	$4,836	$8,222	$13,978
28m/91.8'	Mono	$96	$1,920	$4,992	$8,487	$14,428
29m/95.1'	Mono	$99	$1,980	$5,148	$8,752	$14,879
30m/98.4'	Mono	$104	$2,080	$5,408	$9,194	$15,630
31m/101.7'	Mono	$107	$2,140	$5,564	$9,459	$16,081
32m/105'	Mono	$110	$2,200	$5,720	$9,724	$16,531
33m/108.3'	Mono	$114	$2,280	$5,928	$10,078	$17,133
34m/108.3'	Mono	$117	$2,340	$6,084	$10,343	$17,584
35m/114.7'	Mono	$121	$2,420	$6,292	$10,697	$18,185
36m/55m/Mega	Mono	POA	POA	POA	POA	POA

Source: www.mackaymarina.com.au, 2006

Expansion Plans:

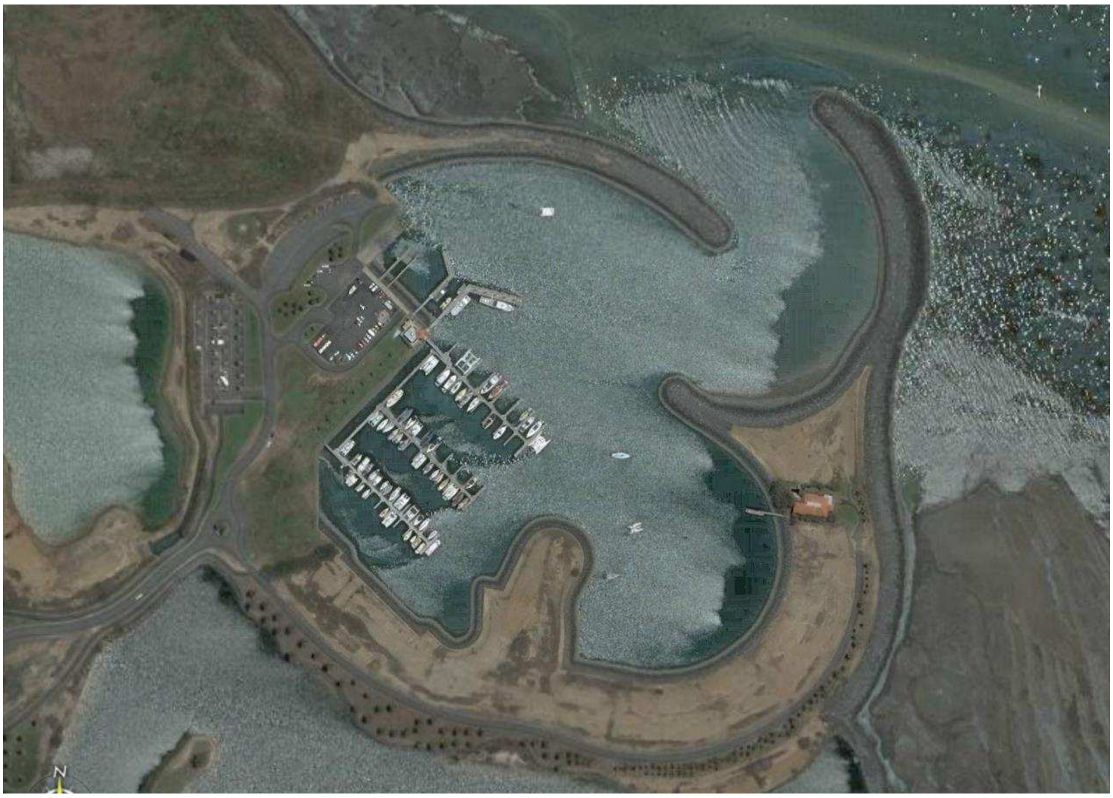
Additional 156 wet berths and 200 dry storage up to 12m length.

Figure 3: Mackay Reef Marina Panoramic View

Source: Pacific Southwest Strategy Group, 2006.

2.2.2 Laguna Quays

Figure 4: Laguna Quays Marina



Source: Google Earth, 2006

Facilities and Services:

- *Marinanet* — Wireless internet
- Water , 240v Power, 3 Phase Power for Large Berths
- Pump out sewerage and bilge, waste disposal
- Security Lighting, Security Patrols
- No Height Restrictions
- Fuel Wharf, Diesel, Unleaded, Gas & Ice
- Off street parking for Car & Trailer
- Lock up Storage
- Boat Ramp Access
- Laundromat, Hot Showers, Toilets, BBQ's
- Mariner's bar, bottle shop
- Eatery,
- Eftpos available
- Email facilities, photocopier/fax
- Mail service
- Eight seater bus
- Provisions at Proserpine/Airlie Beach
- Home of L.Q.Y.C.

Location:

- Near Midge Point, approximately 108 kilometres from Mackay and 35 kilometres from Proserpine
- Direct water access to the Great Barrier Reef and Pacific Ocean
- Five kilometres to Bruce Highway

- 110 kilometres to Mackay Airport, 30 kilometres to Proserpine Airport

Berths:

110 wet berths total, comprising:

Mono hull: 17 x 10m, 17 x 12m, 30 x 18m, 14 x 20m

Multi hull: 2 x 12m, 1 x 20m, 2 x 40m

Swing Moorings: 10

No dry berths.

Trailer Boats: 40

Lease Rates:

Table 9: Laguna Quays Marina Leasing Rates

Berth Size	Type	Daily	Weekly	Monthly	3 Monthly	6 Monthly	Annual
30'/9M	Mono/Multi	$28/31.50	$142/160	$508/572	$1,295/ 1460.10	$2,360/ 2,660	$3,960/ 4,460
35'/10.5M	Mono/Multi	$30/34	$152/172.50	$543.50/ 616.50	$1,385/ 1,504.50	$2,525/ 2,867.50	$4,237.50/ 4,807.50
40'/12M	Mono/Multi	$32/36.50	$162/185	$579/661	$1,475/ 1,685	$2,690/ 3,075	$4,515/ 5,155
45'/13.5M	Mono/Multi	$34.50/43	$176/219.50	$629/784.50	$1,602.50/ 2,000	$2,922.50/ 3,647.50	$4,905/ 6,117.50
50'/15M	Mono/Multi	$37.50/50	$190/254	$679/908	$1,730 /2,315	$3,155/ 4,220	$5,295/ 7,080
55'/16.5M	Mono/Multi	$45/57.50	$228/292	$815/1,044	$2,077.50/ 2,662.50	$3,787.50/ 4,852.50	$6,355/ 8140
60'/18M	Mono/Multi	$52.50/65	$266/330	$951/1,180	$2,425/ 3,010	$4,420/ 5,485	$7,415/ 9,200
65'/20M	Mono	$65	$330	$1,180	$3,010	$5,485	$9,200
98'/30M	Mono	$85	$430	$1,537	$3,920	$7,145	$11,990
130'/40M	Mono	$105	$533	$1,905	$4,855	$8,860	$14,680
Max 14m	Mooring	$17	$100	$320	$780	$1,400	$2,600
Lock Up	Mono/Multi	$11/12	$18/36	$65/130	$175/342	$301/602	$580/1000

Source: Laguna Quays Marina, 2006

Expansion Plans:

500 wet berths approved, timeframe unknown.

Figure 5: Laguna Quays Marina Panoramic View

Source: Pacific Southwest Strategy Group, 2006.

2.2.3 Abel Point

Figure 6: Abel Point Marina

Source: www.abelpointmarina.com.au 2006

Facilities and Services:

- Deep-water access. (Dredged to 4.75m LAT)
- 3 phase power (32 & 64 amps)
- Sewerage pump out
- 24 hour fast flow fuelling facilities
- 24hr CCTV
- Security and swipe card access to the marina
- Wireless internet network access
- Laundry, toilets
- Food, liquor
- Maintenance and repairs
- Charter base
- Boat ramp (council)
- Parking – free (council) and secure (fee)

Location:

- At Airlie Beach, approximately 157 kilometres from Mackay and 35 kilometres from Proserpine
- Direct water access to the Great Barrier Reef and Pacific Ocean
- 35 kilometres to Bruce Highway
- Half hour by ferry to Hamilton Island Airport, 40 kilometres to Proserpine Airport

Berths:

500 wet berths total, comprising:

120 x 18m, 88 x 24m, 44 x 30m

No dry berths.

Lease Rates:

Table 10: Abel Point Marina Lease Rates (Short Term)							
Berth Size	Type	Daily	Weekly	Monthly	3 Monthly	6 Monthly	Annual
Up to 11m (36')	Mono/Multi	$40/60	$220/320	$750/1,120	$1,800/ 2,750	$3,500/ 5,200	$6,600/ 9,700
12m (40')	Mono/Multi	$55/75	$260/400	$1,020/1,400	$2,550/ 3,500	$4,500/ 7,000	$8,600/ 13,000
15m (50')	Mono/Multi	$60/85	$300/430	$1,050/1,600	$2,650/ 4,000	$5,200/ 7,800	$10,000/ 14,500
18m (60')	Mono/Multi	$90/130	$420/630	$1,600/2,400	$4,000/ 6,000	$7,600/ 11,400	$14,500/ 21,000
21m (70')	Mono/Multi	$110/160	$520/780	$2,000/3,000	$5,000/ 7,500	$9,500/ 14,000	$18,000/ 27,000
24m (80')	Mono/Multi	$160/225	$740/1,100	$2,800/4,200	$7,000/ 10,000	$14,000/ 20,000	$25,000/ 35,000
30m	Mono/Multi	$190/270	$1,000/1,350	$3,700/5,300	POA/POA	POA/POA	POA/PO A
40m	Mono/Multi	$250/300	$1,500/2,000	POA/POA	POA/POA	POA/POA	POA/PO A

Source: Abel Point Marina, 2006

Expansion Plans:

None.

Figure 7: Abel Point Marina Panoramic View

Source: Pacific Southwest Strategy Group, 2006.

2.2.4 Bowen Harbour

Figure 8: Bowen Harbour

Source: Google Earth, 2006

Facilities and Services:

- Commercial fishing operations
- Bowen Yacht Club

Location:

- At Bowen, approximately 186 kilometres from Mackay and 64 kilometres from Proserpine
- Direct water access to the Great Barrier Reef and Pacific Ocean
- One kilometre to Bruce Highway
- 188 kilometres to Mackay Airport, 68 kilometres to Proserpine Airport

Berths:

200 wet berths total, comprising:
30 marina (Bowen Yacht Club), 140 moorings, and 20 commercial
No dry berths.

Lease Rates:

Table 11: Bowen Harbour (Short Term)

Berth Size	Type	Daily	Weekly	Monthly	3 Monthly	6 Monthly	Annual
Up to 11m (36')	Mono/Multi						
12m (40')	Mono/Multi						
15m (50')	Mono/Multi						
18m (60')	Mono/Multi						

21m (70')	Mono/Multi						
24m (80')	Mono/Multi						
30m	Mono/Multi						
40m	Mono/Multi						

Source: Bowen Harbour, 2006

Expansion Plans:

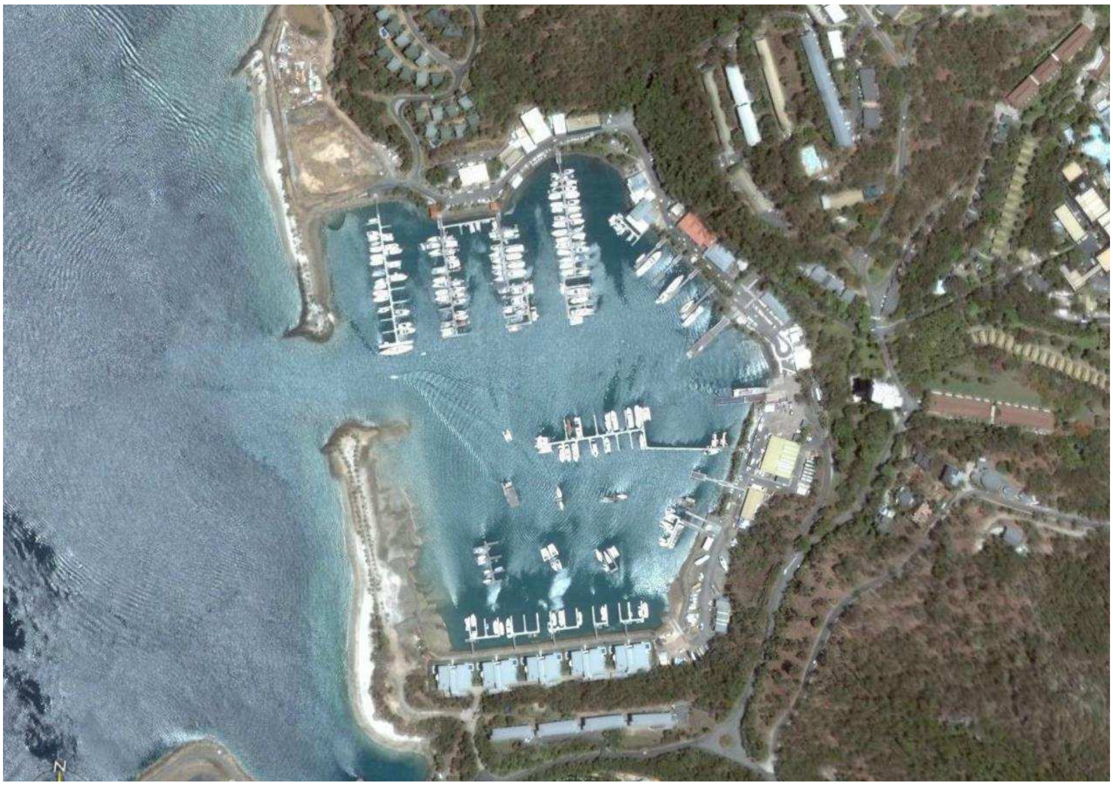
Residential/marina proposals for redevelopment - 600 berths in stages.

Figure 9: Bowen Harbour Moorings

Source: Pacific Southwest Strategy Group, 2006.

2.2.5 Hamilton Island

Figure 10: Aerial View of Hamilton Island Marina



Source: Google Earth, 2006

Facilities and Services:

- Fuel
- Chandlery
- Normal maintenance and repairs

Location:

- Hamilton Island, approximately 19 kilometres from Shute Harbour and 40 kilometres from Proserpine
- Direct water access to the Great Barrier Reef and Pacific Ocean
- 0.5 kilometres to Hamilton Island Airport

Berths:

220 wet berths total, comprising:
205 for lease plus 15 x 10m attached to units
35 dry berths.

Lease Rates:

Table 12: Hamilton Island Marina Lease Rates (Short Term)							
Berth Size	Type	Daily	Weekly	Monthly	3 Monthly	6 Monthly	Annual
Up to 11m (36')	Mono/Multi						
12m (40')	Mono/Multi						
15m (50')	Mono/Multi						
18m (60')	Mono/Multi						
21m (70')	Mono/Multi						
24m (80')	Mono/Multi						
30m	Mono/Multi						
40m	Mono/Multi						

Source: Hamilton Island Marina, 2006

Expansion Plans:

- 200 wet berths in next 3 – 5 years
- 35 dry berths

Figure 11: Hamilton Island Marina

Source: Pacific Southwest Strategy Group, 2006.

2.2.6 Hayman Island

Figure 12: Hayman Island Marina

Source: Google Earth, 2006

Facilities and Services:

Location:

- Hayman Island, approximately 28 kilometres from Shute Harbour and 30 kilometres from Airlie Beach
- Direct water access to the Great Barrier Reef and Pacific Ocean
- 32.5 km to Hamilton Island Airport

Berths:

26 wet berths total:

13 x 10m, 11 x 12m, 1 x 25m

Expansion Plans:

None

Lease Rates:

Berths are only available for resort guests and day rates ranging from $95 to $145 per day for four people with additional people at $25 per day.

2.3. Whitsunday Moorings

In addition to the marinas noted above there designated mooring areas at Abel Point, Airlie Beach and Shute Harbour.

In the *2001 Marina Demand Study*, the total of 413 allocated moorings was noted for these areas. In field studies during June 2006, the project team counted over 300 boats at anchor at these moorings.

These moorings raise a number of management issues such as:

- Located in unprotected waters in cyclone conditions;
- Waste management (solid, sewage and bilge waters); and
- Environmental damage to seabeds through dragging of the bottom anchor chain of the mooring in variable wind and tide conditions.

Phasing out of these moorings in favour of marina berths would provide state and local governments with a more manageable situation for these areas which are in the Great Barrier Reef Marine Park.

3. RESIDENTIAL DEMAND

To gain an understanding of the current situation regarding residential property in the Whitsunday coastal region, a survey of local real estate agents was undertaken (refer Appendix 2).

Following is a summary of their responses to the survey questions.

3.1 Land Sales

Residential land sales were reported as slow for 2006 after strong sales in 2004/05 (with 27 sales in the six months ending March 2006, compared to 59 for the previous six months and 70 prior to that).

Prices for land were reported as follows:

- Majority of sales are within the $150,000 to $249,999 price range;
- Median value $228,000.

Spatially, median prices (December 2005) were as follows:

- Airlie Beach - $480,000;
- Cannonvale - $180,000; and
- Jubilee Pocket - $155,000.

Elevated sites with water views and waterfront properties command much higher prices than the median values listed above.

Over the last five years, median land prices have increased at an average 26.6 percent per annum.

3.2 House Sales

Sales have slowed with 80 sales in the six months to March 2006, compared with nearly 120 for the previous six months.

The range of prices for residential housing was reported for the six months ending March 2006 as follows:

- Majority of sales have been within the $300,000 to $500,000 price range;
- Median price $400,000.

Prices rose by 6.7 percent for the year ending March 2006, with increases averaging 18.1 percent per annum for the last five years.

3.3 Unit Sales

Unit sales have been fairly static with just under with 100 sales per six month period since March 2004, compared with nearly 120 for the previous six months in 2003.

The range of prices for units was reported for the six months ending March 2006 as:

- Majority of sales have been within the $140,000 to $350,000 price range;
- Median price $296,000.

Prices rose by 26 percent for the year ending March 2006, with increases averaging 20.8 percent per annum for the last five years. The last six months has seen little increase in median prices.

3.4 Lot Sizes

The size of lots in demand was reported as follows:

- 700 square metres for houses;
- 1000 square metres for duplexes.

3.5 Market Demand

Locations most in demand were reported as:

- Airlie Beach;
- Cannonvale; and
- Waterfront land.

Units and townhouses were noted as the type of development most in demand.

3.6 Land Bank

Most respondents noted that the current land bank was sufficient to meet demand for residential land for the next three years although one agent suggested that demand for views and water front land would always be higher then for normal suburban lots.

Figure 13: Marina Residential Development – Hamilton Island

Source: Pacific Southwest Strategy Group, 2006.

4. ECONOMIC SNAPSHOT

The *Whitsundays* is one of the world's most desirable short break holiday destinations. It has 74 idyllic islands and is the major gateway to the magical Barrier Reef. More than 750,000 tourists visited the region last year.

Commonwealth and Queensland State Governments largely protect the future of the *Whitsundays* as an environmental region. The economic drivers for the region are tourism, sugar cane farming and cattle grazing while major mines and export ports are located north and south of the region.

4.1 Population

At June 2003, the Whitsunday Shire's population was 16,454 persons, of which the largest town was Cannonvale with 3,430 residents. Other population centres included Proserpine (3,347 pop.), Airlie Beach (2,375 pop.) and Hamilton Island (842 pop.). The number of persons aged 15 years and over was 13,302 (80.8 percent compared to 79.2 percent for the State). Overall, the Whitsunday Shire had a lower proportion of Indigenous persons (1.2 percent) than the State as a whole (3.1 per cent).

The population of the region increased from 13,935 in June 1996 to 17,512 in June 2005. This represented a rise of 3,577 or 25.7 percent for the period.

Table 13: Resident Population (1996 - 2004)

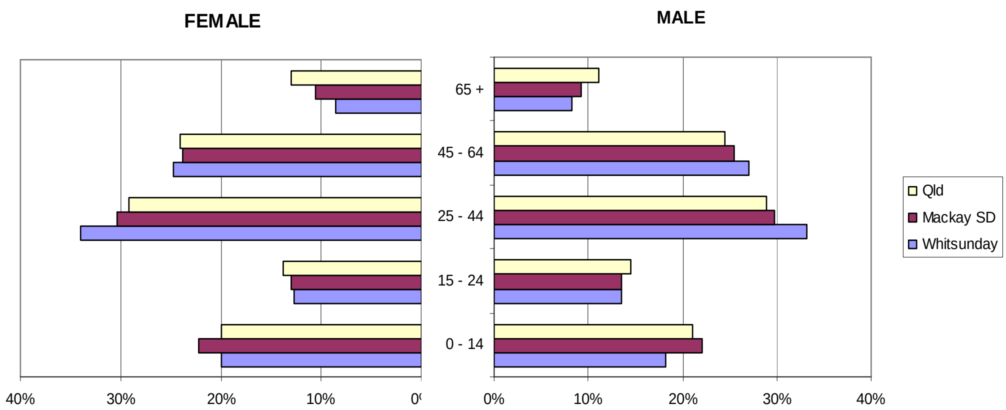
Year	Whitsunday Shire	Mackay SD	Queensland
1996	13,935	133,466	3,338,690
2001	15,522	137,539	3,628,946
2003	16,454	141,729	
2005[1]	17,512	146,080	3,963,968
Av. Annual Growth Rate 1996 – 2004	2.6%	1.0%	1.9%

Note: [1] Estimate
Source: Planning Information and Forecasting Unit (DLGPSR), 2006

4.2 Age Profiles

The age profiles for Whitsunday Shire and Queensland are shown below.

Figure 14: Age Profile for Whitsunday Shire and Queensland (2004)



Source: OESR 2006

Compared to Queensland, Whitsunday Shire has a higher percentage of its population in the 25–44 and 45–64 age brackets, but less in the 0–14, 15–24 and 65+ age brackets.

4.3 Selected Medians

The following table shows selected medians for age, income and average household size for Whitsunday Shire and the State.

Table 14: Selected Medians for Whitsunday and Queensland (2001)

	Whitsunday Shire	QLD
Median age	35	35
Median weekly individual income	$426	$360
Median weekly household income	$717	$735
Average household size	2.3	2.6

Source: ABS Census 2001

Australian Taxation Office figures (2003/04) revealed that the residents of Whitsunday Shire had a mean taxable income of $35,611 or 11 percent less than the Queensland average ($40,037).

4.4 Employment

The table below shows that the *Accommodation, Cafes and Restaurants* sector dominated the employment of workers in the shire. This sector is followed by the, *Retail Trade, Transport and Storage, Manufacturing, and Property and Business Services* sectors.

Table 15: Industry Employment Profiles (2001)

Industry	Whitsunday Shire	Mackay SD	QLD
Agriculture, Forestry and Fishing	583	6,585	76,532
Mining	41	4,695	19,286
Manufacturing	761	5,438	167,380
Electricity, Gas and Water Supply	38	466	12,359
Construction	672	4,242	111,209
Wholesale Trade	288	3,476	79,718
Retail Trade	1,203	8,873	239,615
Accommodation, Cafes and Restaurants	1,761	4,339	88,381
Transport and Storage	899	3,984	77,587
Communication Services	80	563	23,016
Finance and Insurance	189	1,122	44,562
Property and Business Services	711	4,384	153,864
Government Administration and Defence	195	1,620	75,048
Education	399	3,945	118,896
Health and Community Services	549	4,490	151,029
Cultural and Recreational Services	203	888	37,341
Personal and Other Services	291	1,706	57,662
Non-classifiable economic units	43	317	7,452
Not stated	143	1,181	27,927
Total	9,049	62,314	1,568,864

Source: ABS 2001 Census Release 2 Data.

The highest employing occupations in the region were *Intermediate Clerical, Sales and Service Workers*. *Professionals, Associate Professionals* and *Tradespersons and Related Workers* represent the next highest employing occupations. Refer to the table following for details.

Table 16: Occupation Employment Profiles (2001)			
Occupation	Whitsunday Shire	Mackay SD	QLD
Managers and Administrators	919	6,055	133,295
Professionals	1,240	7,398	251,273
Associate Professionals	1,232	6,526	187,910
Tradespersons and Related Workers	1,206	9,259	200,665
Advanced Clerical and Service Workers	330	1,774	54,677
Intermediate Clerical, Sales and Service Workers	1,429	8,438	265,751
Intermediate Production and Transport Workers	780	8,909	133,702
Elementary Clerical, Sales and Service Workers	931	5,604	158,222
Labourers and Related Workers	772	6,968	152,773
Inadequately described	91	463	11,385
Not stated	110	861	19,211
Total	9,040	62,255	1,568,864

Source: ABS 2001 Census Release 2 Data

The 2001 census data showed the unemployment rate was 6.6 percent for Whitsunday Shire and 7.3 percent for Mackay Statistical Division. More recent estimates (December 2005) suggested an unemployment rate of 4.5 percent for the Whitsunday Shire. The following table shows estimated unemployment rates for comparative purposes.

Table 17: Unemployment Rates			
Year	Whitsunday Shire	Mackay SD	QLD
2001[1]	6.6 %	7.3 %	8.2 %
Dec 2005[2]	4.5 %	4.7 %	4.8 %

Source: (1) ABS Census 2001 Release 2 Data
(2) DEWR Small Area Labour Markets – Australia – December Quarter 2005

As can be seen from the above data, Whitsunday Shire's unemployment rate is well below the regional and state levels.

4.5 Economic Activity

Neither ABS nor OESR publish Gross Regional Product (GRP) estimates at sub-regional level, so that it was necessary to prepare a model to understand the size and value of the economy. This was done in consultation with OESR.

This suggested that in 2000/01, the value of the Whitsunday Shire economy was approximately $571.1 million.

Table 18: Whitsunday Shire GRP Estimate 2000 - 01		
Industry Sector	Employment (fte) (a)	Regional GRP ($m) (b)
Agriculture, forestry and fishing	583	44.70
Mining	41	24.67
Manufacturing	761	57.05
Electricity, gas and water	38	5.84
Construction	672	34.72
Retail and wholesale trade	1491	70.01
Accommodation, cafes and restaurants	1,761	70.50
Transport, storage and communication services	979	97.57

Table 18: Whitsunday Shire GRP Estimate 2000 - 01		
Industry Sector	Employment (fte) (a)	Regional GRP ($m) (b)
Finance, insurance, property and business services	900	72.86
Government administration, defence, education, health and community services	1143	62.66
Cultural, recreational, personal and other services	680	30.55
GRP at factor cost (c)		571.12

Note: (a) 2001 Employment Data by Industry Sector Source: ABS, 2001 Census of Population and Housing, Basic Community Profile (BCP) - Second Release
(b) Based on Mackay SD Region GRP/Employee 1998/99 Increased by CPI to 2001. Source: OESR
(c) Excludes ownership of dwellings, net taxes on products and taxes on production.

Source: Pacific Southwest Strategy Group Pty Ltd, 2006

The table above shows that *Transport, Storage and Communication Services* was the largest industry sector with 17.0 percent GRP share. *Finance, Insurance, Property and Business Services* was the second largest in 2001 with a 12.7 percent share, followed by *Accommodation, Cafes and Restaurants* with a 12.3 percent share.

Agriculture:

The total gross value of agricultural production in *Mackay SD* for the year ended June 2001 was $626.6 million, representing 8.6 percent of the Queensland total. *Crops* (62 percent) and *livestock disposals* (37 percent) comprised the majority of the total value of agricultural production in the region.

Whitsunday Shire's value of agricultural production was $125.5 million, or 20 percent of the region's total. The following table shows the strength of the shire's agriculture is in its Livestock (52.7 percent by value) rather than its crops.

Table 19: Gross Value of Agricultural Production Whitsunday Shire YE June 2001 ($m)				
Region	Crops	Livestock Disposals	Livestock Products	Total
Whitsunday Shire	26.7	66.2	-	125.5
Mackay SD	388.9	231.9	5.8	626.6
Queensland	3,391.2	3,368.4	490.3	7,249.9
Mackay SD as % of Qld	11.5	6.9	1.2	8.6

Source: Mackay Statistical Divisions Regional Profile – 2003, OESR

The total value of agricultural production for Whitsunday Shire noted above compares favourably with the GRP estimate in table 17.

Major Projects:

The *Projects Queensland Issue No. 25* recently released by the Department of State Development, Trade and Innovation (DSDTI) lists the following major projects proposed for Whitsunday Shire:

- Ivana Great Barrier Reef resort valued at $200 million;
- Peppers Coral Coast Resort valued at $140 million;
- Whisper Bay apartments valued at $282 million;
- Port of Airlie Marina Development valued at $450 million;
- Dent Island Golf Course Stage 1 valued at $25 million (total $85 million); and
- Shute Harbour Marina valued at $240 million.

Building Approvals:

For the FY March 2006, there were 247 dwelling units in new residential buildings approved in Whitsunday Shire, valued at $79.3 million and represented 0.9 percent of the total value of Queensland's residential approvals over the period.

The total value of non-residential building approvals in Whitsunday Shire FY March 2006 was $48.8 million, representing 0.9 percent of the value of these approvals in Queensland.

Table 20: Value of Building Approvals for YE March 2006					
LGA	Residential Dwelling units	Residential Value	Non-residential	Total value approved	Residential as Proportion of Total Value
	Number	$'000	$'000	$'000	%
Whitsunday Shire	247	79,305	48,824	128,128	61.9
Mackay SD	1,441	362,024	167,663	529,687	68.3
Queensland	38,445	9,245,122	5,666,423	14,911,544	62.0
Whitsunday as a % of Qld	0.6	0.9	0.9	0.9	. .

Source: Australian Bureau of Statistics, Building Approvals, Queensland.

Business Numbers:

Whitsunday Shire exhibits a high degree of specialisation in *Accommodation, cafes and restaurants, Transport and storage* and *Cultural and recreational services*, with the proportion of business numbers in each well above the state average.

Table 21: Number of Businesses by Industry							
Industry	Whitsunday Shire (number)	% of total	Mackay SD (number)	% of total	Qld (number)	% of total	Whitsunday Shire as a % of Qld
Agriculture, forestry and fishing	237	18.4	2,940	30.0	34,554	17.2	0.7
Mining	2	0.2	81	0.8	830	0.4	0.2
Manufacturing	55	4.3	399	4.1	11,071	5.5	0.5
Electricity, gas and water supply	8	0.6	68	0.7	729	0.4	1.1
Construction	123	9.5	916	9.3	21,697	10.8	0.6
Wholesale trade	59	4.6	453	4.6	12,973	6.4	0.5
Retail trade	184	14.3	1,340	13.7	30,660	15.2	0.6
Accommodation, cafes and restaurants	119	9.2	474	4.8	7,844	3.9	1.5
Transport and storage	130	10.1	610	6.2	10,464	5.2	1.2
Communication services	10	0.8	65	0.7	1,154	0.6	0.9
Finance and insurance	22	1.7	245	2.5	6,544	3.3	0.3
Property and business services	164	12.7	854	8.7	29,830	14.8	0.5
Government administration and defence	8	0.6	64	0.7	1,493	0.7	0.5
Education	17	1.3	217	2.2	4,446	2.2	0.4
Health and community services	46	3.6	507	5.2	13,414	6.7	0.3
Cultural and recreational services	46	3.6	185	1.9	4,141	2.1	1.1
Personal and other services	61	4.7	398	4.1	9,493	4.7	0.6
Total	1,291	100.0	9,816	100.0	201,337	100	0.6

Source: Australian Bureau of Statistics, Business Register, Unpublished data, 2001

The 1998 figures are the most current statistics available.

4.6 Tourism Snapshot

Unlike the majority of regions in Queensland, the *Whitsundays* RTO region and the ABS' Whitsundays Statistical Division are the same.

4.6.1 Destination image

Recent market research by *Tourism Queensland* revealed that the *Whitsundays* conjured up perceptions of:

- Beach;
- Weather;
- Scuba diving/snorkelling;
- Sailing, yachting and bare boating; and
- Great Barrier Reef.

The competitive strengths of the *Whitsundays* were identified as:

- Ability to access islands;
- Ability to visit a reef, dive and snorkel;
- Tropical climate;
- Beautiful beaches; and
- Being relaxed and casual.

Activities generally associated with the *Whitsundays*, included going to the beach (incl. swimming, surfing, diving), eating out at restaurants, general sightseeing, water activities or sports, charter boat / cruise / ferry rides, visit friends & relatives, pubs, clubs and discos, bushwalking or rainforest walks, go shopping for pleasure and snorkelling.

4.6.2 Whitsundays Visitor Type

In the year ended December 2005, there were 754,247 visitors to the *Whitsundays* of which 42 percent were from within Queensland.

Table 22: Overnight Visitor Data for the Whitsundays (YE December 2005)

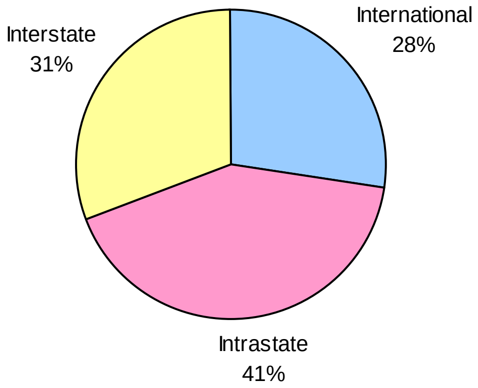
	Domestic	International
Visitors	546,000	208,000
Visitors as a proportion of the QLD total	3.3%	9.7%
Annual growth (growth in visitor numbers QLD)	+31.3% (-4%)	-6.7% (+1%)
Visitor nights	2,544,000	1,113,000
Visitor nights as a proportion of the QLD total	3.3%	3.7%
Growth in visitor nights (Growth in visitor nights in QLD)	+33.8% (-4%)	-7.1% (+5%)
Average length of stay (nights)	4.7	5.3

Source: Whitsundays - Regional Update December 2005. Tourism Queensland 2006.

The table shows that the number of domestic visitors increased by 31.3 percent for the YE June 2005 and accounted for 72 percent of all visitors to the region, while international visitors fell by 6.7 percent for the same period.

The breakdown by visitor source to the *Whitsundays* region is as follows:

Figure 15: Whitsundays Visitor Source (December 2005)

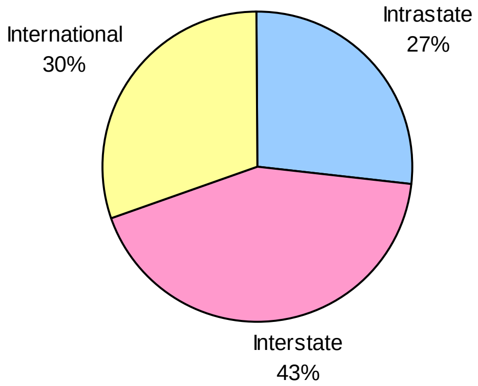


Source: Tourism Queensland 2006

Key domestic markets were Queensland 41 percent, followed by interstate (31 percent) and international (28 percent). The major international markets were United Kingdom (34 percent), Europe (excluding UK & Germany, 23 percent) and Germany (11 percent).

In terms of visitor nights, there were 3.66 million in total with the breakdown for the markets as follows:

Figure 16: Whitsundays Visitor Nights (December 2005)



Source: Tourism Queensland 2006

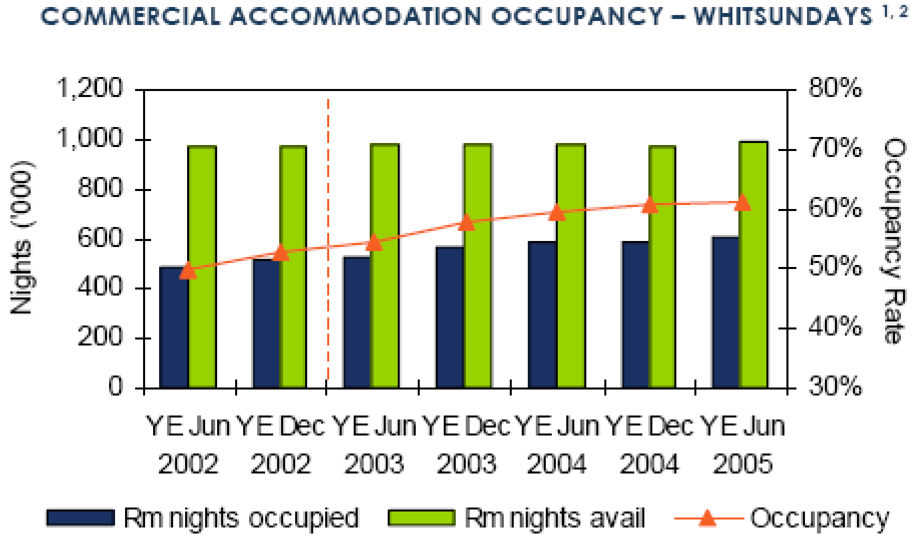
The main reasons for visiting the *Whitsundays* for domestic visitors was to relax and rejuvenate (90%), to spend time with their partner, family or friends (88%), and to take a break from the everyday grind (87%).

4.6.3 Whitsundays Hotels and Motels Room (2005)

The current situation regarding provision of commercial accommodation in the *Whitsundays* is:

- 2,805 hotel, motel, guest house and serviced apartment guest rooms were available in the *Whitsundays* as at December 2005 –the majority of these being hotel guest rooms.
- Between December 2004 and December 2005, 96 additional guest rooms became available.
- 628,853room nights were sold in the last year (up 7.1% on the year ended December 2004).
- Daily room rate for *Whitsundays* establishments averaged $187.78 (up $3.69 compared with the previous year).
- Occupancy has been trending upwards since the year ended December 2002, to average 62.0%.

Figure 7: Whitsundays Occupancy Rate (2002/2005)



Source: Tourism Queensland, 2005

4.6.4 Proposed Accommodation

Projects Queensland 2005/06 lists the following projects for the Whitsunday Shire

Table 23: Whitsunday Shire Proposed Accommodation Projects		
Project	Accommodation Units	Timeframe
Ivana great Barrier Reef Resort	– 42 apartments	Completion: 2008
Peppers Coral Coast Resort Conference Centre	 – 121 apartments, 6 penthouses – 98 suites, 4 villas	Completion: late 2007
Whisper Bay	– 98 apartments, – 6 penthouses	Completion: mid 2007
Port of Airlie	– 356 apartments – 14 detached houses	Commence: 2006/07
Dent Island Golf Course Resort	– ?? units	Completion: Stage 1 late 2008
Shute Harbour Marina	– 96 suite resort hotel – 115 lot residential precinct	Completion Q2 2010

Source: DSDTI – Projects Queensland 2005-2006 Issue 25

As can be in the above table there are 827 commercial accommodation units (excluding detached houses and residential allotments) proposed for the shire over several years. Should all these accommodation units become available immediately and demand stay at current levels then occupancy would fall to just below 50 percent. However this scenario is unlikely with the availability of units likely to be spread over several years and demand increasing in line with current trends.

4.7 Population Forecast

Following are the medium series population forecasts for Whitsunday Shire and Queensland until 2026:

Table 24: Resident Population and Forecast (2004 - 2026)

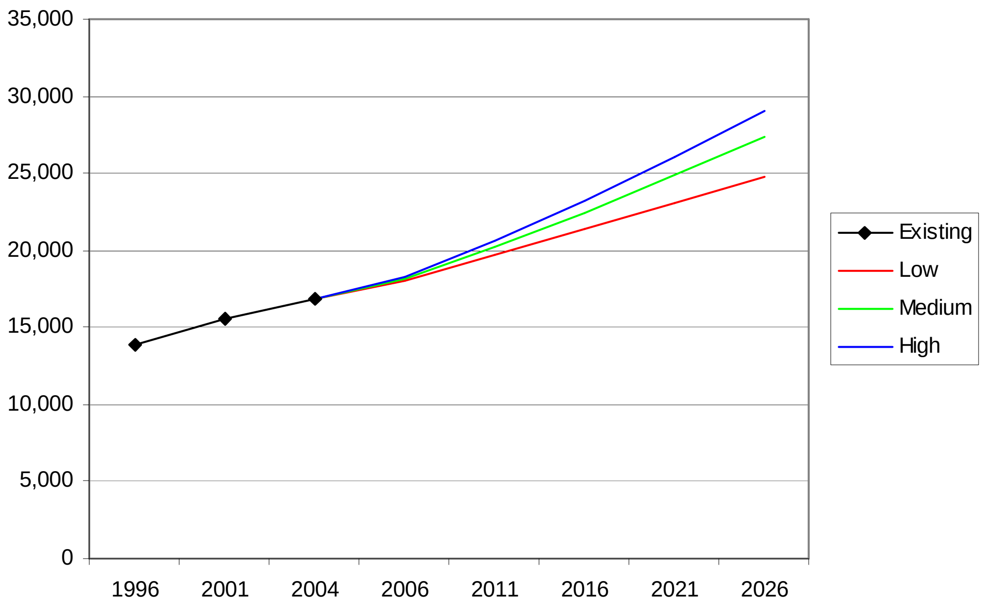
Year	Whitsunday Shire	WHAM	Queensland
2004	16,900	143,923	3,882,037
2006[1]	18,009	147,657	4,015,722
2011[1]	19,730	155,574	4,354,106
2016[1]	21,449	163,827	4,677,780
2021[1]	23,125	172,397	4,989,871
2026[1]	24,706	180,974	5,289,027
Av. Annual Growth Rate 2004 – 2026	1.7%	1.1%	1.5%

Note: [1] Projected Figure (Medium Series)

Source: Planning Information and Forecasting Unit (DLGPSR)

The figure below shows the high, medium and low series populations projections for Whitsunday Shire to 2026. By 2026 the population is projected to be between 24,706 and 29,032, an increase over 2004 figures of between 46.1 and 71.7 percent.

Figure 17: Whitsunday Shire Population Projections



Source: Pacific Southwest Strategy Group Pty Ltd, 2006, based on DLGPSR projections.

5. MARINA INDUSTRY OPPORTUNITIES

Based on the field consultations and after taking into consideration the issues affecting the Australian marine industry, the project team considers that the *Shute Harbour Marina* development presents opportunities for:

- Marina berths;
- Dry boat storage;
- Charter boat base;
- Time and fuel saving for Shute Harbour as a boat base for visitors to the islands, compared to Airlie Beach;
- Retail;
- Car parking; and
- Residential.

From the market research and consultation, the project team's assessment of the WHAM marina industry concluded that there was:

- Strong demand for marina berths and dry boat storage particularly at competitive price points;
- Shortage of marina berths/dry storage;
- Continuing growth in boat ownership based on the high percentage of high income earners due to proximity to the coal fields; and
- Continuing trend for interstate boats to permanently locate in the region.

The market research also revealed that the *Whitsundays* region has:

- Sufficient supply of normal suburban residential land to cope with short-term forecast growth; but
- Limited supply and high demand for premium residential coastal land with views or water frontage.

With the forecast regional population growth and relatively highly paid workers, increased demand for premium residential land is considered likely.

Domestic tourism visitation is increasing and higher demand for resort accommodation is considered likely.

Figure 18: Marina Opportunities

Source: Pacific Southwest Strategy Group Pty Ltd, 2006

6. PRECINCT DEMAND MODEL

As a result of the market research and industry opportunities discussed in the previous section, it is suggested that the major focus for the proposed precinct at Shute Harbour should be marina services, residential and resort accommodation with a consumer/retail component and have the following elements:

- Moorings and dry storage;
- Retail (resort wear, cafés and bars);
- Charter boat base
- Residential;
- Resort hotel;
- Car parking (public and secure): and
- Office and associated commercial.

However with the nature of the proposed development and the site constraints, onsite car parking other than that required for the development is not favoured.

6.1 Demand Model

6.1.1 Overview of Whitsundays Psyche/Profile

The Whitsundays region with its calm waters and islands, pristine environment and scenic beauty is the premier destination for boat owners in Australia and for local and international tourists.

Residential:

Major residential areas exist in Cannonvale, Airlie Beach and Proserpine which serve as the retail, commercial and administrative centres. Residents are typically middle aged and have considerable spending power.

Market research suggests that while prices for house, units and land have remained high after significant gains over the last five years, numbers of sales have slowed although house and units sales rates are still above 10 year averages.

Looking at the wider region, demand for prestige waterfront properties is still being driven by the high earnings of workers, especially those working in the Bowen Basin coalfields

Even with less ambitious growth, the project team are confident of acceptable returns over the next five years for a development at Shute Harbour, especially with marina and, bay and island views from higher floors and, because of likely associated demand drivers of the marina and other facilities on site. Any investment property should perform well.

6.1.2 Growth Trends

Whitsunday Shire is located within the WHAM region and its population is forecast to grow at a higher rate then the region average due to its desirable climate and lifestyle attributes.

Population growth for the next 20 years is projected to be:

- Whitsunday 1.7 percent per annum or an increase of 37.1 percent overall;
- WHAM region 1.1 percent per annum or an increase of 22.5 percent overall; and
- Queensland 1.4 percent per annum or an increase of 31.7 percent overall.

Housing increases to cater for these projected population growths based on the existing household sizes is estimated at:

- Whitsunday will require an additional 2,912 dwelling units to meet demand; and

- WHAM region will require an increase of 12,814 dwelling units.

6.2 Demand Summary

The following demand model has been developed by the project team from situation analysis and industry and stakeholder consultation and provides an estimate of the existing demand for the various components of the proposed development.

Shute Harbour Marina Precinct current demand summary:

Table 25: Marine Precinct Elements

Element	Quantity	Justification
Marina Berths	733	- Shortage of berths in WHAM region (estimated waiting list + 121) - by 2010 projected to be + 737 berths required - by 2020 projected to be + 3,129 berths required - 2,489 marina berths planned for WHAM region - Charter boat base - Relocation of moorings to safe waters
Dry berths	40	- Marine precinct average 38 from survey
Residential	115 lots	- Population growth and need for upmarket choices
Resort Hotel (4/4.5 star)	96 rooms	- Based on increasing occupancy of regional hotels, motels and serviced apartments

Source: Pacific Southwest Strategy Group, 2006

However, as demonstrated by the proponent at *Mackay Marina*, once a development of this type commences, demand grows and outstrips expectations.

At current regional sales demand rates for waterfront property, it will take ten years to sell the proposed residential land.

For this reason, the project team suggests that a staged development should provide the following:

Table 26: Marine Precinct Recommended Elements

Element	Quantity	Staging
Marina Berths	733	3 stages
Dry berths	0	
Residential	115 residential lots	5 stages
Resort Hotel (4/4.5 star)	96 rooms	

Source: Pacific Southwest Strategy Group, 2006.

Figure 19: Mackay Reef Marina Development

Source: Pacific Southwest Strategy Group, 2006

Your project team for this study was Phil Graham, who figured it out;
Meagan Thorrold, who checked it out; and Richard Elliott, who made the coffee.

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Appendix 1: Situation Analysis

1. SITUATION ANALYSIS

1.1 Secondary Data Review

1.1.1 Regional Planning

As part of the research for this project, the following studies and reports were reviewed and assessed:

- Shute Harbour Marina EIS 2005:
- Whitsunday Region Marina Demand Study 2001;
- State Infrastructure Plan 2001;
- State Infrastructure Plan Implementation Plan 2004-05;
- Whitsunday Shire Council Planning Scheme;
- Whitsunday Shire Council Feasibility Study for Trailer Boats;
- Whitsunday Economic Development Strategy, 2006;
- DSDI Marine Taskforce priorities;
- Department of Transport (Marine Department) – Trends in boat and operator licenses;
- Queensland Transport Recreational Boating Survey March 2004; and
- Queensland Strategy for Growing Tourism.

Issues and opportunities identified from the scan and relevant to the Shute Harbour Marina Project are covered in various sections of the report. Details of the scan are contained in Appendix 5.

1.1.2 Queensland Marine Industry

Based on a survey commissioned by the *Queensland Government* in 2004, the *Boating Industry Association Queensland* estimated that Queensland's marine industry contributed $1.4 billion to the state's economy and employed over 7,300 people.

To put this into context, listed below are several other industry sectors and their annual contribution to the state's economy.

Table 1: Comparative Queensland Industry Sectors 2002/03

Sector	Gross Value of Production ($ billion)	Comments
Bovine (1)	2.9	Includes breeding, slaughter, research and exports of beef
Dairy (1)	0.25	Breeding, production and exports
Equine (2)	1.8	Breeding, racing, equestrian and events, net wagering and slaughter
Grain (1)	0.46	Production, R & D, export
Marine (3)	1.4	Manufacture, servicing, retail, distribution, brokerage and marinas
Sugar (1)	0.96	Production/ export

NOTES: (1) OESR; (2) 2003/04, Pacific Southwest Strategy group Pty Ltd, 2005; (3) 2004, BIAQ

Source: Pacific Southwest Strategy Group Pty Ltd, 2005, assembled from industry sources and as noted.

Based on these figures, the Queensland marine industries' gross value of production is nearly half that the bovine industry and only $400 million short of that for the equine industry, but significantly more than sugar, grain and dairy.

The marine industry and the boat building sector in particular represented one of the largest manufacturing and value added sectors in the state and was identified by *Department of State Development Trade and Innovation* (DSDTI) as having the following strengths:

- Expertise in manufacture, refit and maintenance of high quality vessels, including superyachts;
- Vibrant local industry, specialists designing and servicing for recreational, luxury, commercial and navel boats and ships;
- Highly technical workforce trained to international standards;
- Well established marine precincts and new infrastructure development;
- Extensive range of first class commercial and club marinas and port infrastructure;
- Proven reputation as exporter of marine products including ships, boats, design, chandlery supplies and infrastructure planning and design;
- Queensland accounted for over 40 percent of Australian sales turnover in recreational boating; 67 percent of national exports worth $122million; and average sector growth of nine percent per annum over a ten year period;
- Marine industry and boatbuilding sector in particular, represented one of the largest manufacturing sectors in Queensland. This sector has substantial regional presence and significant potential for increased growth.
- Largest boat building state, dominated by pleasure craft;
- Niche market opportunities for specialist areas such as fast ferries, luxury pleasure craft and super yacht construction;
- 252 marine establishments, with a strong concentration in South East Queensland; and
- Industry turnover in 1999/00 was $228million with average ten year growth of nine percent per annum.

1.1.3 Recreational Boating in Queensland

In Queensland, 199,700 people undertook a marine activity of some type according to a study undertaken by the Australian Sports Commission in 2004, which may have included participation in *fishing* and *scuba diving* but not necessarily in a boat.

In terms of popularity, *fishing* ranked 11th, *waterskiing/powerboating* ranked 24th and *sailing* ranked 34th.

Table 2: Queensland Sport & Recreation Participation Rates 2004

Rank	Activity	Number ('000)		
		Males	Females	Total
1	Walking (other)	374.6	794.2	1,168.80
2	Swimming	170.7	278.2	448.9
3	Aerobics/fitness	154	275.8	429.8
4	Cycling	170	121.1	291.1
5	Running	146.5	78.2	224.7
6	Golf	185.6	29.5	215.1
7	Tennis	103.6	105.1	208.7
8	Walking (bush)	68.5	64.2	132.7
9	Touch football	76.4	47.7	124.1
10	Soccer (outdoor)	83.9	33.1	117
11	Fishing	94.5	20.0	114.6
12	Yoga	7.3	92.6	99.9
13	Surf sports	79.4	15.1	94.4
14	Weight training	57.1	21.5	78.6
15	Netball	—	77.6	77.6
16	Cricket (outdoor)	66.3	7.3	73.7
17	Squash/racquetball	49	22.8	71.9
18	Basketball	47.8	14.6	62.5

Table 2: Queensland Sport & Recreation Participation Rates 2004				
Rank	Activity	Number ('000)		
		Males	Females	Total
19	Dancing	7.8	53.5	61.3
20	Martial arts	22.8	37.2	60
21	Rugby league	59.5	—	59.5
22	Lawn bowls	34	23.3	57.3
23	Volleyball	29.6	26	55.6
24	Waterskiing/powerboating	31.7	16.2	48
25	Horse riding/equestrian activities/polocrosse	19.8	27	46.8
26	Soccer (indoor)	30.7	14.5	45.1
27	Motor sports	43.9	—	43.9
28	Rugby union	39.5	3.0	42.5
29	Tenpin bowling	16.6	22.1	38.6
30	Australian football	38.1	—	38.1
31	Cricket (indoor)	33.3	3.2	36.5
32	Aquarobics	6.9	26.4	33.3
33	Athletics/track and field	14.4	13.4	27.8
34	Sailing	21.1	2.1	23.2
35	Ice/snow sports	15.9	6.8	22.8
36	Roller sports	10.9	11.2	22.1
37	Rowing	17.9	3.7	21.5
38	Softball	4.8	15.6	20.4
39	Canoeing/kayaking	9.4	9.3	18.8
40	Orienteering	9.6	9.2	18.8
41	Shooting sports	17.0	—	17
42	Boxing	13.6	3.2	16.8
43	Baseball	12.0	2.5	14.5
44	Scuba diving	9.3	4.5	13.9
45	Hockey (outdoor)	4.7	8.7	13.3
46	Triathlon	7.5	4.6	12
47	Rock climbing	6.7	4.5	11.2
48	Badminton	4.4	4.1	8.5
49	Table tennis	4.3	4.1	8.4
50	Water polo	2.4	4.2	6.6

Source: Australian Sports Commission, 2004

Based on the 2004 survey, the average Australian marine activities participant has the following characteristics:

Table 3: Australian Sport & Recreation Participation Characteristics 2004			
Characteristic	Waterskiing/ Powerboating	Sailing	Scuba Diving
Gender	Male (74%)	Male (65%)	Male (83%)
Age Bracket (years)	15 – 24 (27%) 25 – 34 (31%) 35 – 44 (26%) 45 – 54 (11%) 55+ (5%)	15 – 24 (10%) 25 – 34 (23%) 35 – 44 (24%) 45 – 54 (19%) 55+ (24%)	15 – 24 (12%) 25 – 34 (30%) 35 – 44 (34%) 45 – 54 (22%) 55+ (2%)
Participate (times per year)	1 – 12 (65%)	1 – 12 (58%)	1 – 12 (58%)
Involvement Basis	Non organised (98%)	Non organised (58%)	Non organised (80%)

Source: Australian Sports Commission, 2004

In comparison, a study undertaken by *Maritime Safety Queensland* (MSQ) on recreational boating in 2003 found that respondents had the following characteristics:

- Male (95.5%);
- Age brackets:
    - o <25 (2%);
    - o 25 – 34 (9%);

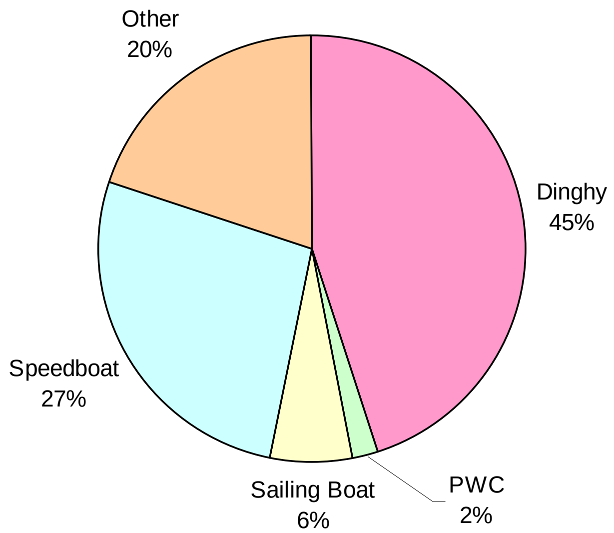
  - o 35 – 44 (22 %);
  - o 45 – 54 (27%);
  - o 55+ (40%); and
- Boating frequency: was two to three times per month (40.5%).

The figures showed that although recreational boating and the three comparison sports were male dominated activities, recreational boating was almost entirely made up of male participants. As could be expected, the data showed that sport-type activities were undertaken by younger participants, while recreational-type activities were by older participants.

Boat registration data for 2003 suggested that pensioners and seniors make up nearly 12 percent of Queensland boat owners.

In addition the MSQ study found that dinghies (45 percent) and speedboats (27 percent) were the most common types of watercraft used.

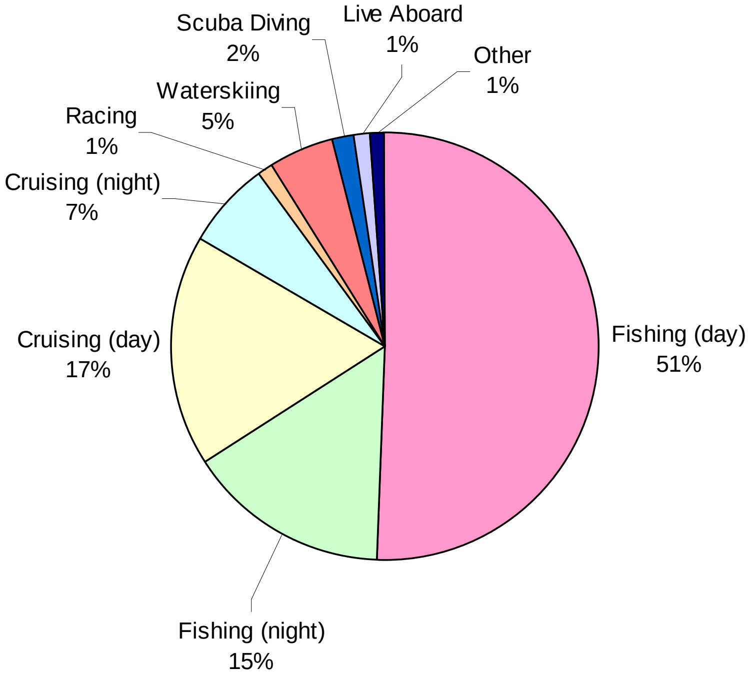
Figure 1: Queensland Recreational Vessel Type - 2003



Source: Maritime Safety Queensland, 2004

In terms of the purpose for boat use, respondents advised that fishing and cruising were the predominant pastimes.

Figure 2: Queensland Recreational Vessel Use – 2003



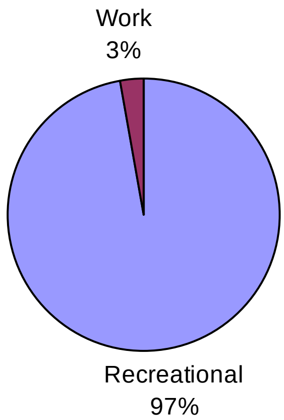
Source: Maritime Safety Queensland, 2004

The average length of trips was between 3 and 5 hours (51 percent), followed by 6 to 10 hours (32.5 percent).

1.1.4 Boats in Queensland

Information provided by Queensland Transport reveals that for 2004/05 there were about 199,650 registered boats in Queensland, with 193,964 for recreational use and 5,681 for commercial (work) purposes.

Figure 3: Number of Queensland Boats - 2005

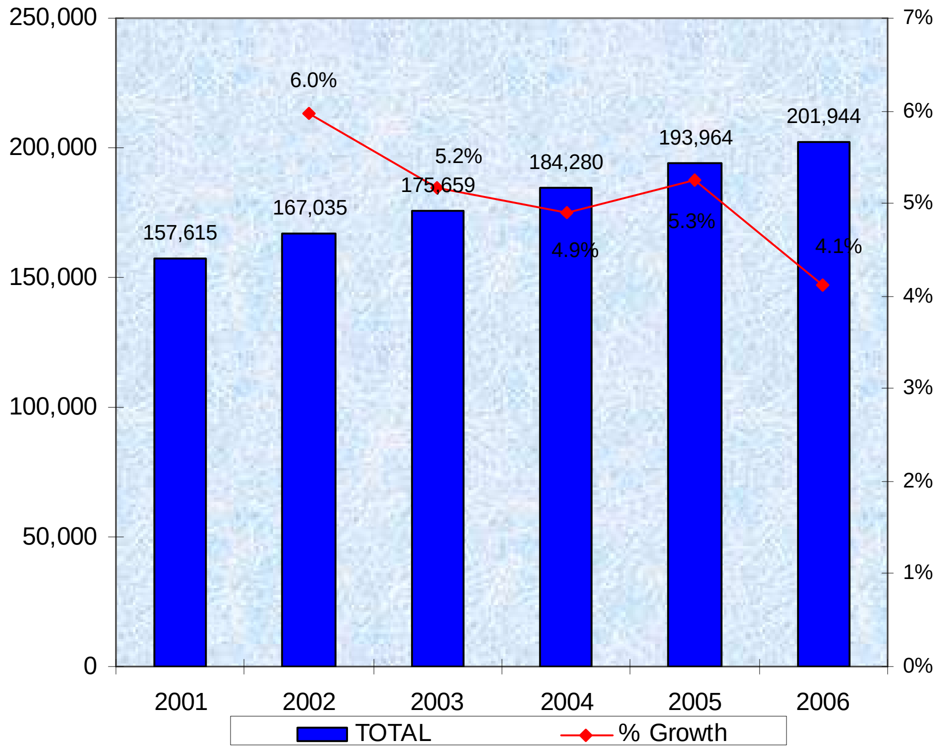


Source: Pacific Southwest Strategy Group Pty Ltd, 2006

As the work boat sector represents such a small portion of the Queensland total and has had little growth for the last three years, the study focuses primarily on the recreational sector.

The recreational boat in use registrations were up 9,687 (or 5.3 percent) on the previous years, as set out below:

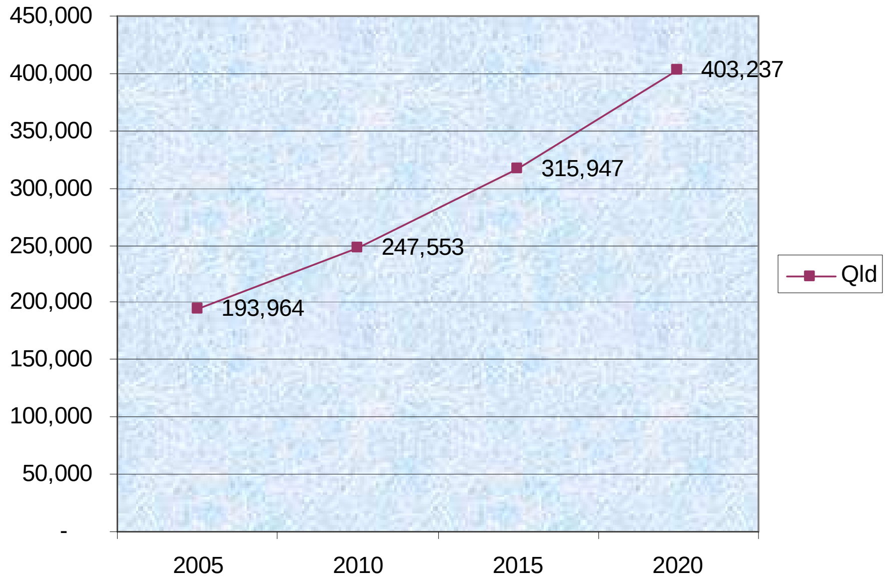
Figure 4: Queensland Recreational Boat Registrations



Note: Numbers for the 2006 year are for the 10 months to the end of April.
Source: Pacific Southwest Strategy Group 2006, based on Queensland Transport Data.

Since 2001, registration numbers have risen by 44,329 or 28 percent. On an annual basis, over the last five years, growth in boat registrations averaged 5.1 percent, more than double Queensland's population growth which fluctuated between 1.5 and 2.5 percent per year over the last decade. This growth in registrations highlights the growing interest and popularity in boating in Queensland. If the trend continues, boat registrations will reach 247,500 by 2010, up 53,536 or 27.6 percent and 403,000 by 2020, up 155,500 or 62.8 percent.

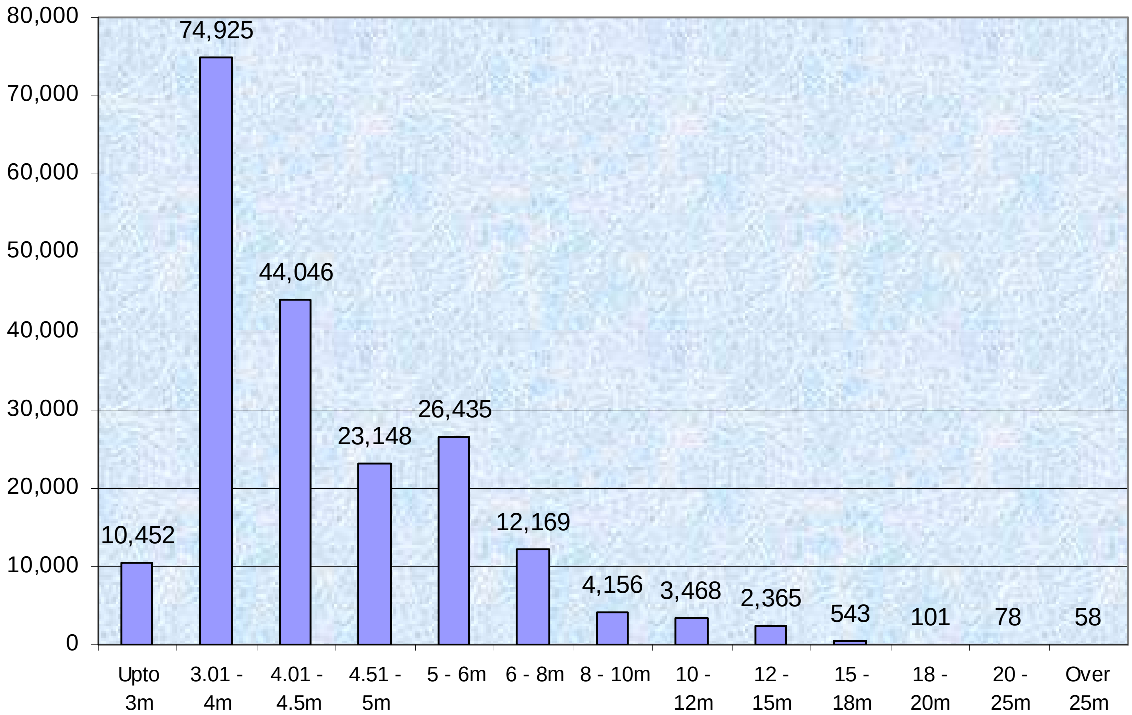
Figure 5: Queensland Recreational Boat Registrations Forecast



Source: Pacific Southwest Strategy Group 2005.

The majority of registered boats in 2005/06 were less than eight metres in length (94 percent), with the three to four metre range being the most popular (37.1 percent).

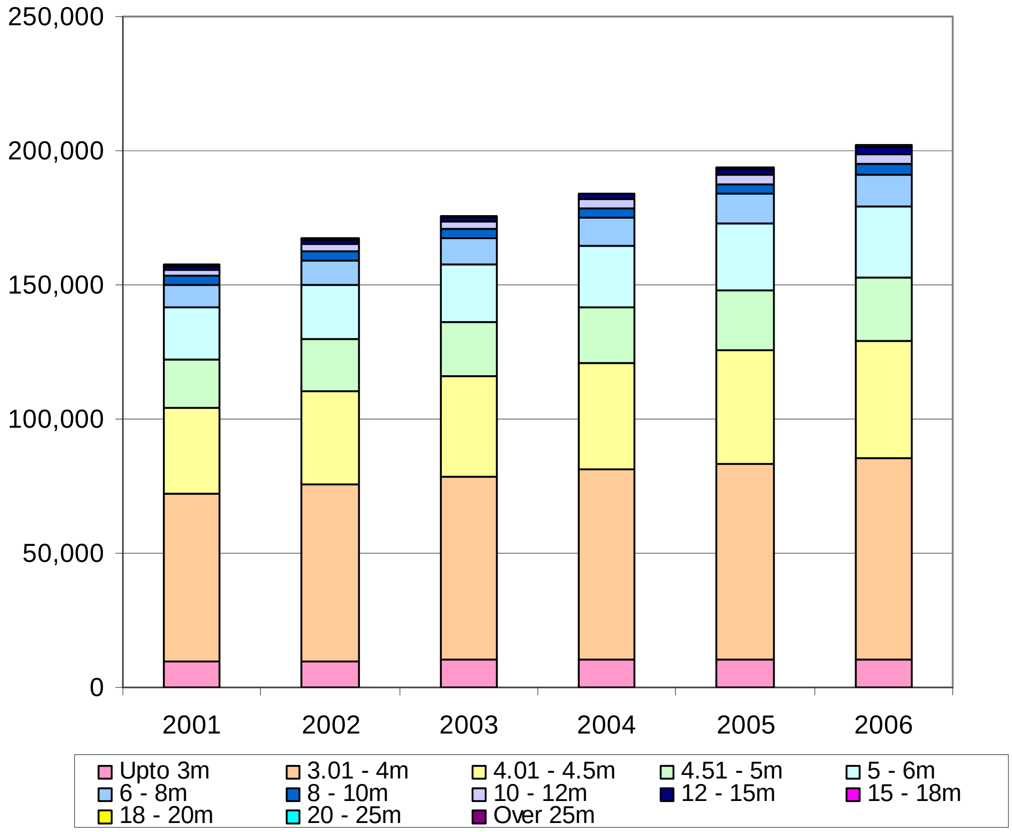
Figure 6: Queensland Recreational Boat Registrations by Length (2005)



Source: Pacific Southwest Strategy Group 2006, based on Queensland Transport Data.

For the preceding years, results for boat registrations numbers by length were generally consistent with those exhibited in 2005/06.

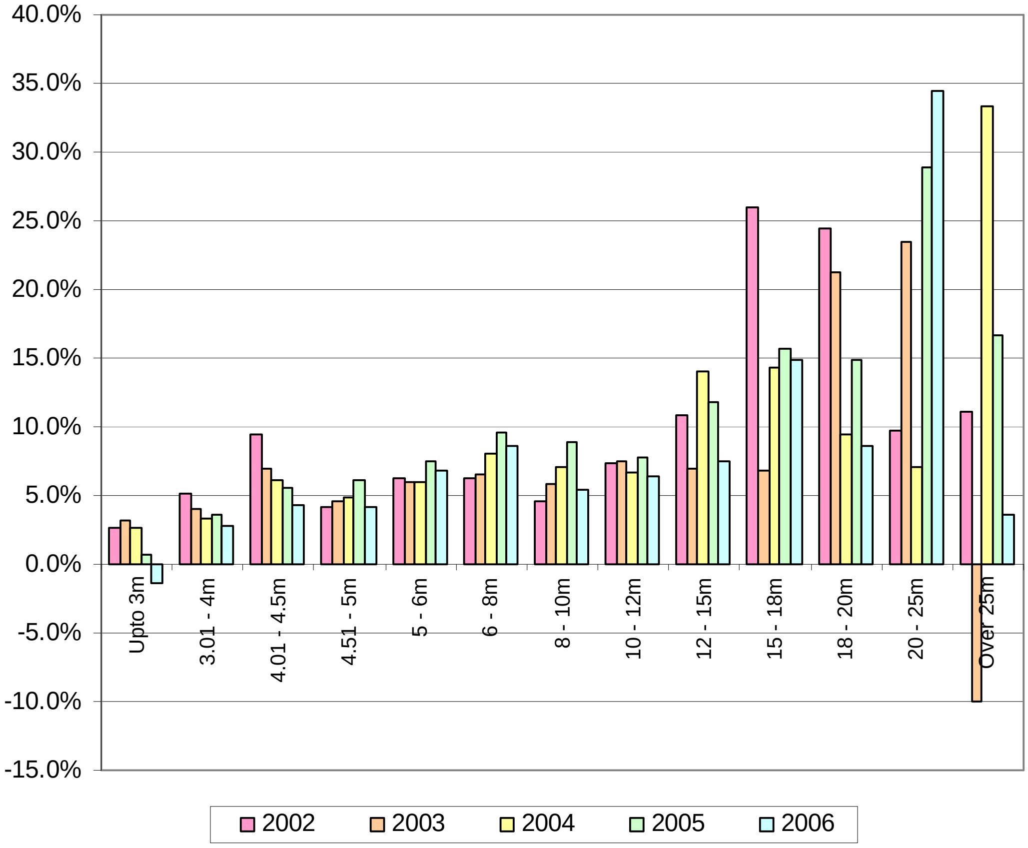
Figure 7: Queensland Recreational Boat Registrations by Length



Source: Pacific Southwest Strategy Group 2006, based on Queensland Transport Data.

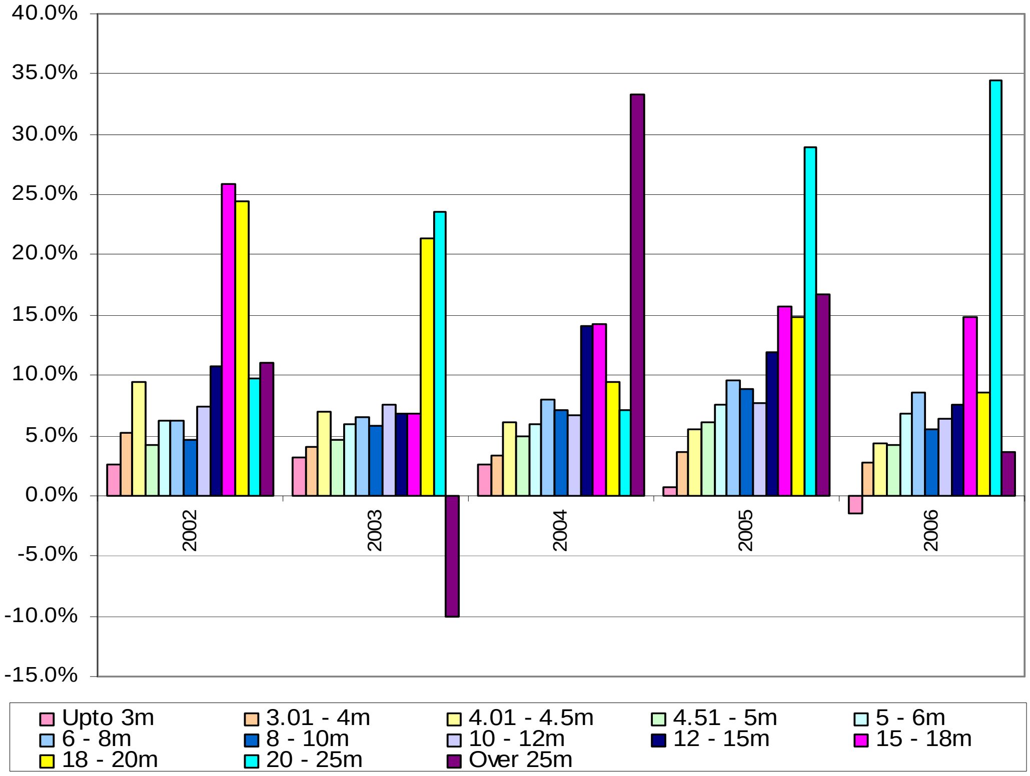
Over the last five years, registrations for boat lengths greater than 12 metres have exhibited the biggest growth, averaging above ten percent per annum, with the 15 metre to 25 metre ranges averaging over 15 percent.

Figure 8: Queensland Recreational Boat Registration Growth – Length by Year



Source: Pacific Southwest Strategy Group 2006, based on Queensland Transport Data.

Figure 20: Queensland Recreational Boat Registration Growth – Year by Length

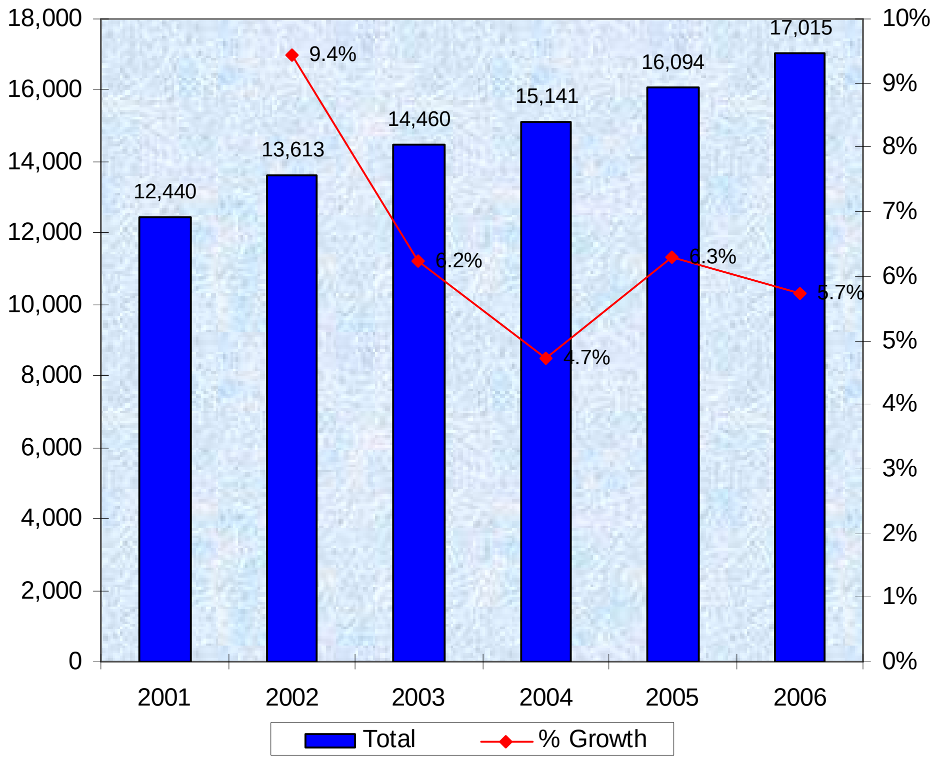


Source: Pacific Southwest Strategy Group 2006, based on Queensland Transport Data.

1.1.5 Boats in the WHAM Region

In *Whitsunday, Hinterland and Mackay Region* (WHAM), which includes the shires of *Belyando, Bowen, Broadsound, Mirani, Nebo, Sarina* and *Whitsunday* and the city of *Mackay*, for 2004/05, recreational boat registration numbers totalled 16,094, up 953 (or 6.3 percent) on 2003/04.

Figure 9: WHAM Recreational Boat Registrations

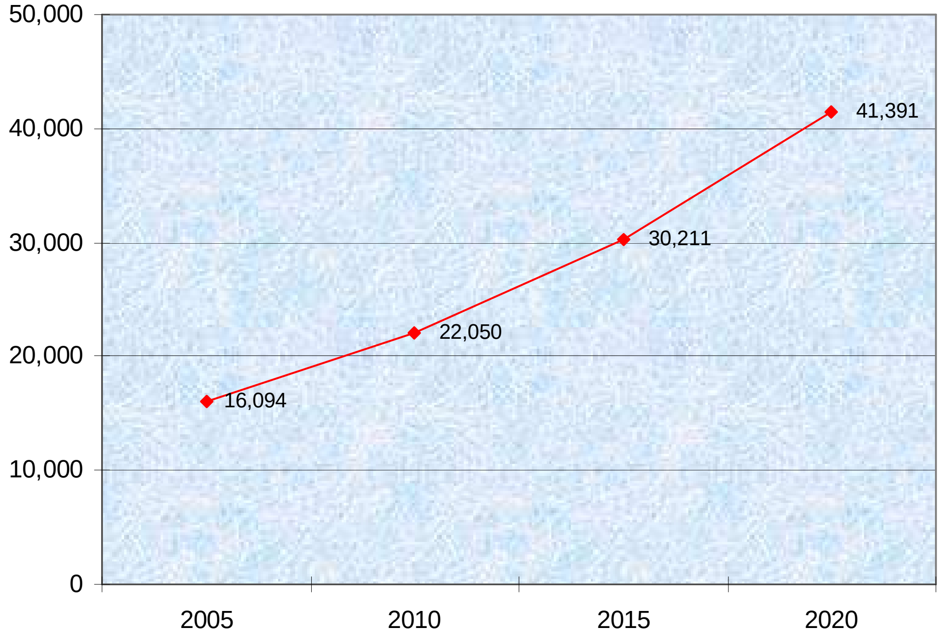


Note: Numbers for the 2006 year are for the 10 months to the end of April.
Source: Pacific Southwest Strategy Group 2006,based on Queensland Transport Data.

Since 2001, registration numbers have increased by 4,575 (or 36 percent). On an annual basis, over the last five years, growth in boat registrations averaged 6.5 percent growth per annum, 1.4 percent higher then the Queensland growth rate.

Based on this trend, it is forecast that boat registrations in the WHAM Region will reach 22,000 by 2010, and 41,000 by 2020 and will then represent just over 10 percent of all forecast boat registrations for Queensland.

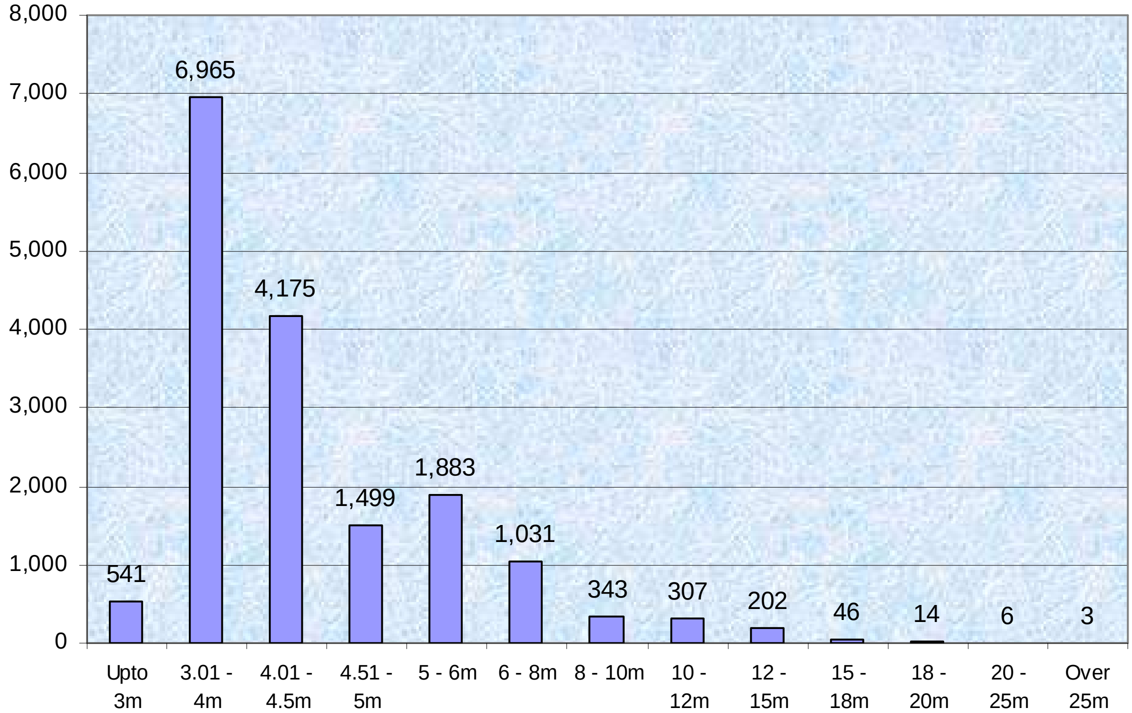
Figure 10: WHAM Recreational Boat Registrations Forecast



Source: Pacific Southwest Strategy Group 2006

In 2005/06 the majority of boats registered were less than eight metres in length (94.5 percent), with the three to four metre range being the most popular (40.9 percent).

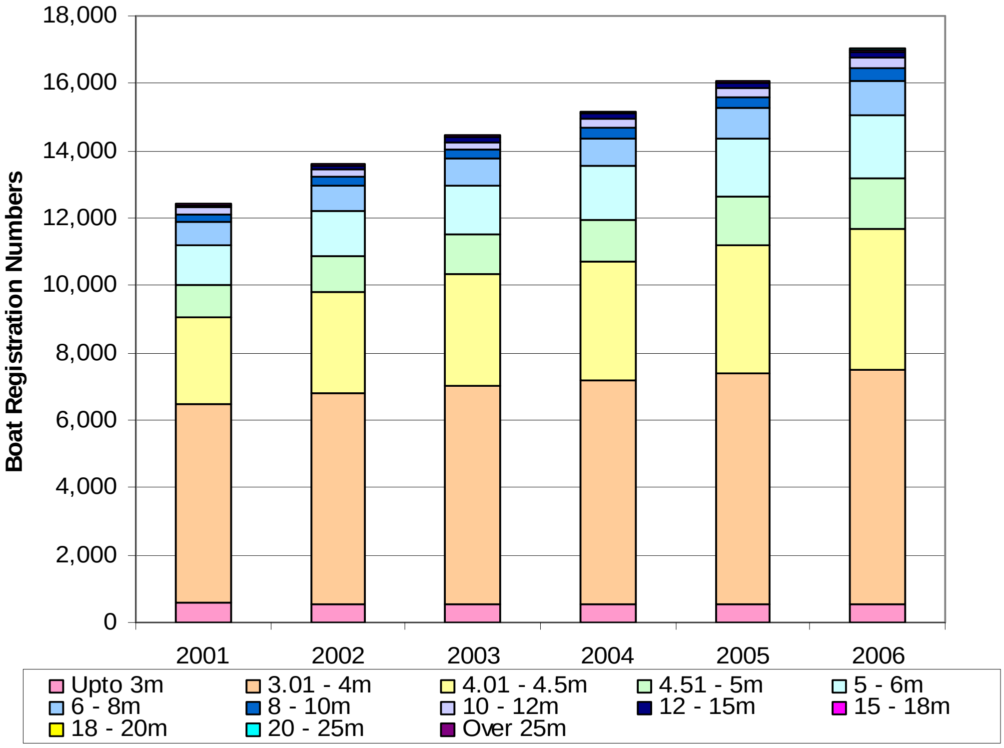
Figure 11: WHAM Recreational Boat Registrations by Length (2006)



Source: Pacific Southwest Strategy Group 2006, based on Queensland Transport Data.

Again, for the preceding years, results for boat registrations numbers by length were generally consistent with those exhibited in 2005/06.

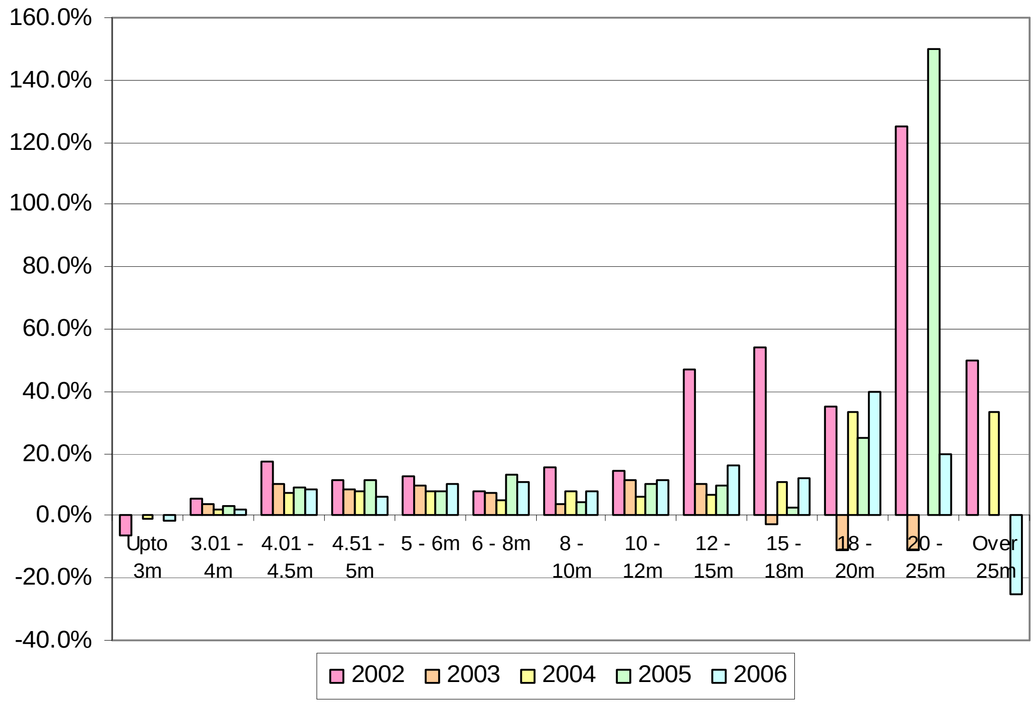
Figure 12: WHAM Recreational Boat Registrations by Length



Source: Pacific Southwest Strategy Group 2006, based on Queensland Transport Data.

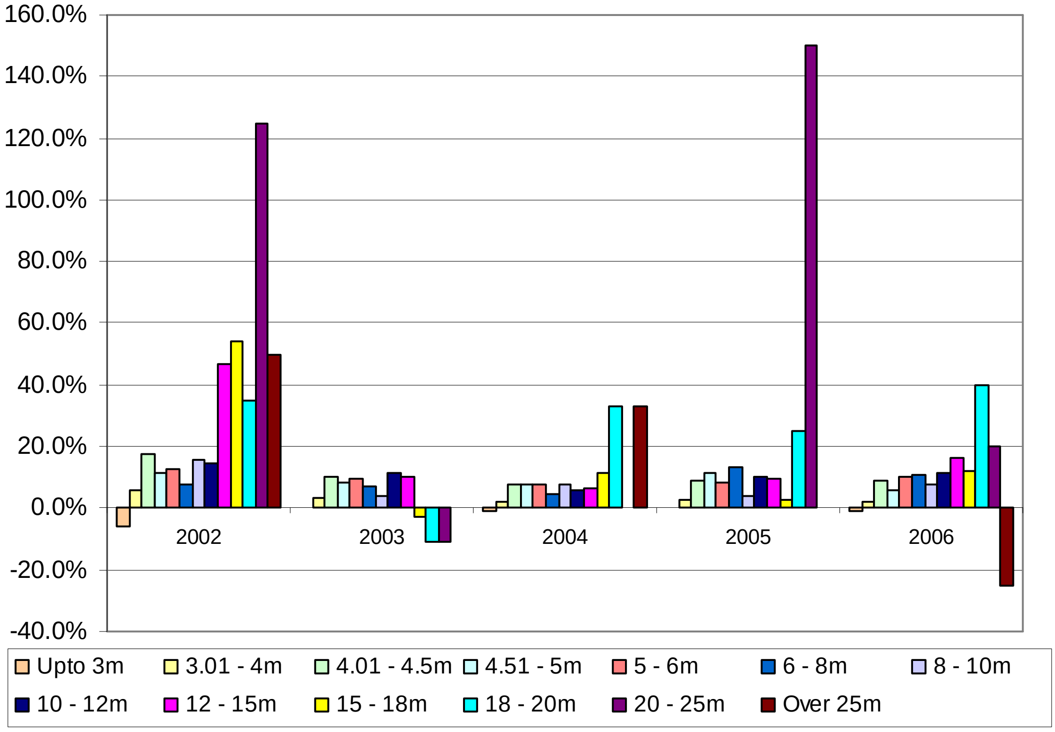
Over the last five years, registrations for boat lengths greater than 12 metres have experienced the largest growth; generally well above ten percent per annum, with the 18 to 25 metre range averaging more than 20 percent, suggesting a concentration of boats of this length in the region.

Figure 13: WHAM Recreational Boat Registration Growth – Length by Year



Source: Pacific Southwest Strategy Group 2006 based on Queensland Transport Data.

Figure 14: WHAM Recreational Boat Registration Growth – Year by length



Source: Pacific Southwest Strategy Group 2006 based on Queensland Transport Data.

Appendix 2: Contact Lists

Table1: Key Stakeholders

Organisation	Contact	Tel:	Email
Whitsunday Shire Council	Tony Hayward Manfred Boldy Brent Bacon	 (07) 4945 0601 (07) 4945 0240	tony.hayward@whitsunday.qld.gov.au manfred.boldy@whitsunday.qld.gov.au
Bowen Shire Council	David Nebauer	07 4761 3612	dnebauer@ozemail.com.au
Tourism Whitsunday	Matthew Williams	4948 5900	gm@whitsundaytourism.com
DSDTI – Mackay region	Howard Hayes	(07) 4967 1099	howard.hayes@sd.qld.gov.au
DSDTI – Marine Taskforce	Ken McKeon	07 3224 5042	ken.mckeon@sd.qld.gov.au
WhambROC	Peter Sherlock	07 4967 3333	whambroc@dlgpsr.qld.gov.au
Boating Industry Association Queensland	Barry Hibberd Michael Hinde	 3899 3333	barry@biaq.com
Mackay Whitsunday Super yacht cluster	Jonathon Crowe	07 4946 6695	johnathon@abelpointmarina.com.au
Mackay Region ACC	Greg Sutherland	(07) 4944 0661	eo@mracc.org.au
Mackay Port Authority	Greg Mann	4955 8110	gmann@mackayports.com
Whitsunday Development Corporation	Rebecca Andrews	4946 1877	
Whitsunday Charter Boat Industry Association	Deb Lewis	0439 480 601	Deb.lewis@wcbia.com

Source: Pacific Southwest Strategy Group 2006

Table2: Marina Operators

Organisation	Contact	Tel:	Email
Abel Point Marina (Whitsundays) Pty Ltd	Jonathan Crowe	07 4946 6695 07 4946 2400	johnathon@abelpointmarina.com.au
Laguna Quays Marina	Geoff Buckingham	07 4947 7844	office@lagunamarina.com.au
Mackay Reef Marina	Peter Hansen	07 4955 6855	info@mackaymarina.com
Hamilton Island Marina	Brett Spice	07 4946 8352	benschooley@hamiltonisland.com.au
Hayman Island Marina	Michael Gooding	07 4940 1234	marine@hayman.com.au
Bowen Harbour		07 4786 1693	bowen.boat.harbour.office@transport.qld.gov.au

Source: Pacific Southwest Strategy Group 2006

Table3: Marine Industry Operators

Organisation	Company Type:	Phone:	Email:
Arabon Seafoods	Terry Must	074786 6706	
Cumberland Charter Yachts	Terry Kemp/Charles Preen	07 4946 7500	cruise@ccy.com.au
Peter Hansen Yacht Broker	Peter Hansen	07 4955 6855	peterhansensales@mackaymarina.com
McCrae's Marine Management	Gary McCrae	07 4948 1142	gaz@whitsunday.net.au
Southern Cross Sailing Adventures Pty Ltd	Terry Hudson	07 4946 6577	terry@soxsail.com.au
Whitsunday Blue Pty Ltd	Liz Mills	07 4948 0856	illusion@whitsunday.net.au

Whitsunday Escape	Trevor Rees	07 4946 5222	trevor@whitsundayescape.com
Whitsunday Rent-A-Yacht	David McMahon (GM)	07 4948 8228	deniabc@bareboat.com.au

Source: Pacific Southwest Strategy Group 2006

Table4: Real Estate Agents

Organisation	Contact	Tel:	Email:
PRD Nationwide	Christi Leet	07 4946 2000	whitsunday@prd.com.au
Coastal Properties Queensland - CPQ		07 4948 7888	info@cpq.com.au
Raine & Horne Whitsunday / Arlie Beach	John Harris	07 4946 6744	john@raineandhornewhitsunday.com.au
Raine & Horne Whitsunday / Cannonvale		07 4948 0028	
Hooker L J	Chris Nicoll	07 4946 4800	whitsunday@ljh.com.au
L J Hooker	As above	07 4946 5677	As above
Ray White (Whitsunday)	Steve Muller	07 4948 8500	whitsunday.qld@raywhite.com
Remax Gateway	Duncan Robb	07 4948 7900	admin@remaxgateway.com.au
CENTURY 21 Coral Coast Realty Bowen	Quinten Muller	07 4786 1132	quintenmuller@century21.com.au
Elders Real Estate Proserpine	Michael Kavanagh	07 4945 2555	proserpineRE@elders.com.au

Source: Pacific Southwest Strategy Group 2006

Table 5: Resort operators

Organisation	Tel:	Fax:	Email
Airlie Beach Hotel	07 4964 1999	07 4964 1988	reservations@airliebeachhotel.com.au
Airlie Cove Resort & Van Park	07 4946 6727	07 4946 5526	airliecove@airliebeach.net.au
Best Western Colonial Palms Motor Inn	07 4946 7166	07 4946 7522	colonialpalms@bestwestern.com.au
Big 4 Adventure Whitsunday Resort	07 4946 1166	07 4946 1595	resort@whitsunday.net.au
Boathaven Spa Resort	07 4948 4948	07 4948 4999	boathaven@whitsunday.net.au
Comfort Resort Club Crocodile Airlie Beach	07 4946 7155	07 4946 6007	airliebeach@clubcroc.com.au
Coral Sea Resort	07 4946 6458	07 4946 6516	gm@coralsearesort.com
Martinique Whitsunday	07 4948 0401	07 4948 0402	info@martiniquewhitsunday.com.au
Mediterranean Resorts	07 4946 6391	07 4946 5556	medres@airlie.net.au
Pinnacles Resort and Spa	07 4948 4800	07 4948 4801	reservations@pinnaclesresort.com
Portside Whitsunday	07 4948 2288	07 4948 2266	info@whitsundayportside.com
Whitsunday Vista Resort	07 4948 4000	07 4946 7786	vista@airlie.net.au
Whitsunday Wanderers Resort	07 4946 6446	07 4946 6761	reservations@koalaresort.com.au

Source: Pacific Southwest Strategy Group 2006

Appendix 3: Secondary Data Review

<table>
<tr><th colspan="3">Table 1: Secondary Data Review Summary – GENERAL REPORT INFO</th></tr>
<tr><td>Title</td><td>Author</td><td>Date</td></tr>
<tr><td>State Infrastructure Plan</td><td>State Development</td><td>2001</td></tr>
<tr><td>Key Issues (eg. SWOT etc)</td><td colspan="2">Recommendations (and strategies)</td></tr>
<tr><td>Economic Advantages for the Mackay region include:
▪ Diversified economy;
▪ Well established and expanding sugar industry;
▪ Areas of underdeveloped productive agricultural land;
▪ Emerging aquaculture industry;
▪ Large number of operating coal mines and undeveloped coal and oil shale deposits;
▪ World class coal transport systems;
▪ Established coal industry service sector;
▪ Established research centre for the sugar industry;
▪ Excellent tourist accommodation and natural attractions such as the Whitsundays;
▪ Major regional airport at Mackay and ten smaller airports
▪ Relatively high personal income levels in Mackay city; and
▪ Educational institutes with two university campuses at Mackay and TAFE campuses in Mackay, Airlie Beach/Cannonvale and Bowen.
▪</td><td colspan="2">Opportunities for the Mackay region include:
▪ Expansion of tourism sector (traditional resort-based tourists, cruise ship and small pleasure craft passengers, back packers and self drive tourists) supported by development of major new tourist attractions, hotels and resorts, and marinas.</td></tr>
<tr><td colspan="3">Other items</td></tr>
<tr><td colspan="3">▪</td></tr>
</table>

Source: Pacific Southwest Strategy Group 2006

Table 1: Secondary Data Review Summary (Part 1) – GENERALD REPORT INFO

Title	Author	Date
Whitsunday Region Marina Demand Study – 2001	Brown & Root	25 January 2001
Key Issues (eg. SWOT etc)	Recommendations (and strategies)	
Marina Demand Projections: ▪ Mackay and Whitsundays expected to maintain steady growth in population, with a decline expected in Bowen ▪ Likely increased emphasis on marina developments at Airlie Beach and Shute Harbour ▪ Capacity of Laguna Quays and Hamilton Island to expand in response to increase in demand ▪ Expansion of Mackay Harbour has largely satisfied local demand ▪ Acute shortage of marina facilities in Bowen ▪ Estimated increase of 142 boats in the region over 1991 to 1998 period ▪ Estimated increase in boat numbers of 537 over 15 years to 2015	Bowen and Mackay areas: ▪ Continue to encourage private sector investment ▪ Address possible impediments that may limit private sector investment ▪ Investigate other means and sourcing of funds for construction, operation and maintenance of marinas ▪ Review pricing of existing facilities to better reflect comparable mooring facilities Whitsunday area: ▪ Promote development of new marina facilities in the Airlie Beach and Shute Harbour area by: o Monitoring progress of Abel Point expansion, Shute Harbour Marina and Sailing Club proposals over next two years o Reassess possible public sector involvement if no substantial progress is made on these projects over the next two years o Continue to provide moorings at Abell Point, Airlie Beach and Shute Harbour o Monitor boat ramp and trailer parking facilities to ensure that any increase in demand for trailerable boats as a result of decline in availability of marina berths is catered for o Review disaster management plans as a result of and increase in the number of unprotected boats in the region during cyclone season o Recognise preferred locations for marina development as identified and encourage their development through a facilitated approval process	
Other items		
▪ Provided an assessment mechanism for identifying preferred marina sites		

Source: Pacific Southwest Strategy Group 2006

<table>
<tr><th colspan="3">Table 1: Secondary Data Review Summary (Part 1) – GENERALD REPORT INFO</th></tr>
<tr><td>Title</td><td>Author</td><td>Date</td></tr>
<tr><td>State Infrastructure Plan Implementation Report - 2004/05</td><td>State Development and Innovation</td><td></td></tr>
<tr><td>Key Issues (eg. SWOT etc)</td><td colspan="2">Recommendations (and strategies)</td></tr>
<tr><td>For the Mackay region:
▪ Significant contributors to the region’s economy are the coal mining and manufacturing industries, agriculture (particularly sugar) and tourism.</td><td colspan="2">Current projects for the MacKay region:
▪ The $350M Port of Airlie development has been approved and will provide for a 240 berth marina, passenger ferry terminal, residential component and a retail precinct.
Future projects for the Mackay region:
▪ Development of the Bowen Marina proposal over 5 years subject to Market Assessment
▪ Cruise Ship Infrastructure development - subject to Market Assessment</td></tr>
<tr><td colspan="3">Other items</td></tr>
<tr><td colspan="3">▪</td></tr>
</table>

Source: Pacific Southwest Strategy Group 2006

<table>
<tr><th colspan="3">Table 1: Secondary Data Review Summary (Part 1) – GENERALD REPORT INFO</th></tr>
<tr><td>Title</td><td>Author</td><td>Date</td></tr>
<tr><td>Whitsunday Shire Council Planning Scheme</td><td>Whitsunday Shire Council</td><td>16 June 2000</td></tr>
<tr><td>Key Issues (eg. SWOT etc)</td><td colspan="2">Recommendations (and strategies)</td></tr>
<tr><td>▪</td><td colspan="2">▪ Shute Harbour Site designated on Strategic Plan as Marina</td></tr>
<tr><td colspan="3">Other items</td></tr>
<tr><td colspan="3">Marina Designation:
It is intended to maintain the important economic benefits of boating in the region. Ongoing investigation of proposed marinas at Boathaven Bay and Shute Harbour and expansions to facilities at Hamilton Island and Abel Point. It is not intended to provide for major public marina development elsewhere along the coast. Small scale and private facilities may be considered appropriate subject to detailed environmental appraisal.</td></tr>
</table>

Source: Pacific Southwest Strategy Group 2006

Table 1: Secondary Data Review Summary (Part 1) – GENERALD REPORT INFO		
Title	Author	Date
Whitsunday Economic Development Strategy, 2006	Pacific Southwest Strategy Group	2006
Key Issues (eg. SWOT etc)	Recommendations (and strategies)	
Urgent issues within the Shire: ▪ Unprecedented growth in the Whitsunday Shire which currently has approximately $1.2 billion worth of investment scheduled to occur over the next few years; ▪ Lack of coordinated investment attraction and control mechanisms; ▪ Need to diversify the economic base and improve the social, environmental and economic sustainability of the Shire; ▪ Transport issues impacting on future economic development; ▪ Infrastructure requirements to service the growing population; ▪ Land use strategies and future planning requirements; ▪ Significant need for enhanced education and workforce skills, especially in regard to high growth knowledge-based industries; ▪ Need to progress economic development while at the same time, maintaining the Shire's relaxed atmosphere, unique environment and quality of life for individuals; ▪ Necessity of addressing the diverse needs of distinct communities within the Shire; ▪ Integration of previously documented local and regional strategic priorities; and ▪ Need to identify future development initiatives and strategies for their implementation.	Essential ingredients for the economic development for the Whitsundays. *Improved infrastructure through:* ▪ Implementation of the revised IPA plan; ▪ Expansion of marine and ancillary facilities; ▪ Provision of more serviced land; ▪ Water supply enhanced by pipeline from the Burdekin; ▪ CBD public and private parking; and ▪ Broadband services ramp up.	
Other items		
Whitsundays had the following competitive advantages: ▪ Island Tourism; ▪ Great Barrier Reef; ▪ Entrepreneurial spirit of the locals; ▪ Two well-serviced airports; and ▪ Charter Boating.		

Source: Pacific Southwest Strategy Group 2006

Table 1: Secondary Data Review Summary (Part 1) – GENERALD REPORT INFO		
Title	Author	Date
Queensland Strategy for Growing Tourism	Tourism Queensland	
Key Issues (eg. SWOT etc)	Recommendations (and strategies)	
▪ Foster strategic investment in hard, soft and innovation technology tourism infrastructure and services	▪ Facilitate regional development tourism priorities and initiatives ▪ Incorporate strategic tourism priorities into all levels of government planning and funding of infrastructure and services ▪ Encourage increased private investment in tourism infrastructure and services ▪ Quantify the size and contribution of the Queensland tourism industry ▪ Influence the quality of Queensland tourism product by encouraging practices favourable to market development	
Other items		
▪		

Source: Pacific Southwest Strategy Group 2006