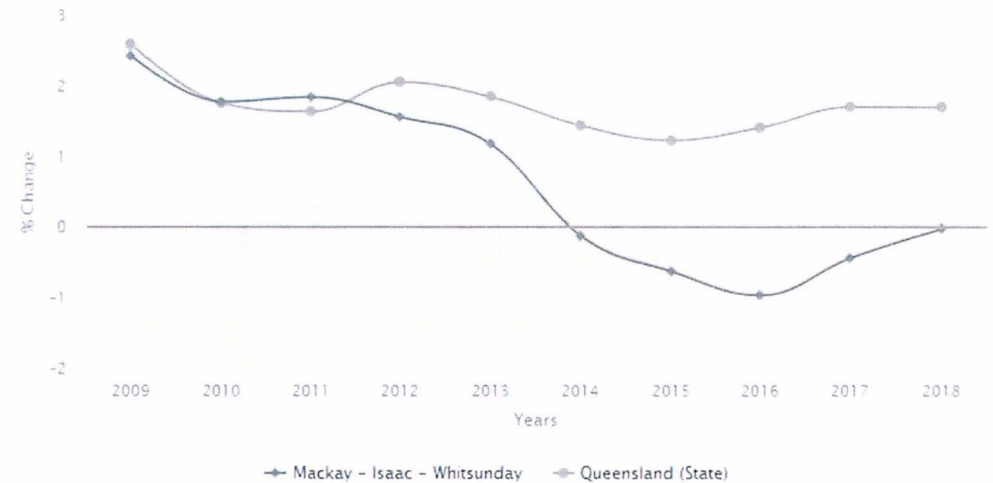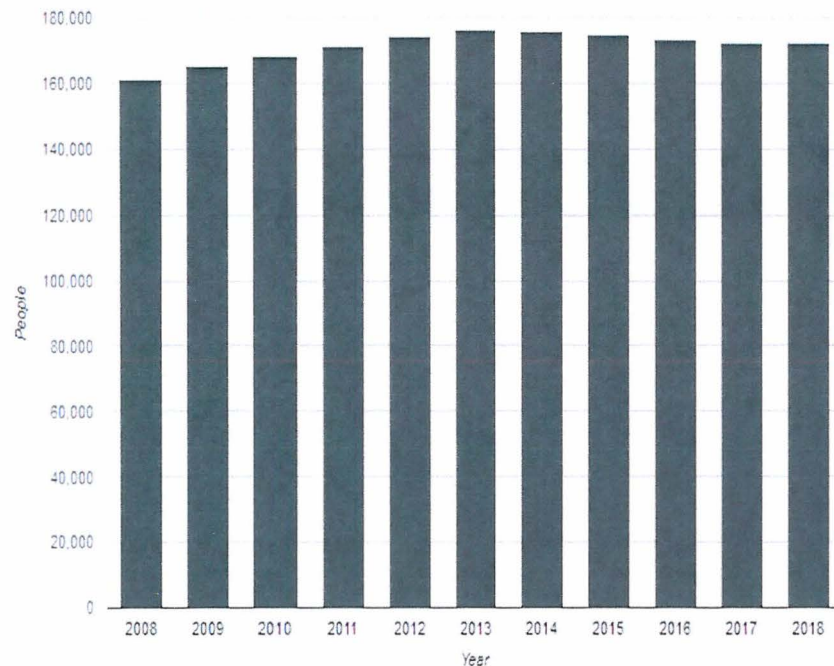# Regional Profile Snapshot

MIW population

The latest (2018) estimated residential population for Mackay - Isaac - Whitsunday is **172,523** people. The total number of people that were usually resident in Mackay - Isaac - Whitsunday on Census night in **2016** was **169,693** people, an increase of **1.7%** from the **166,811** people that were usually resident on Census night **2011**
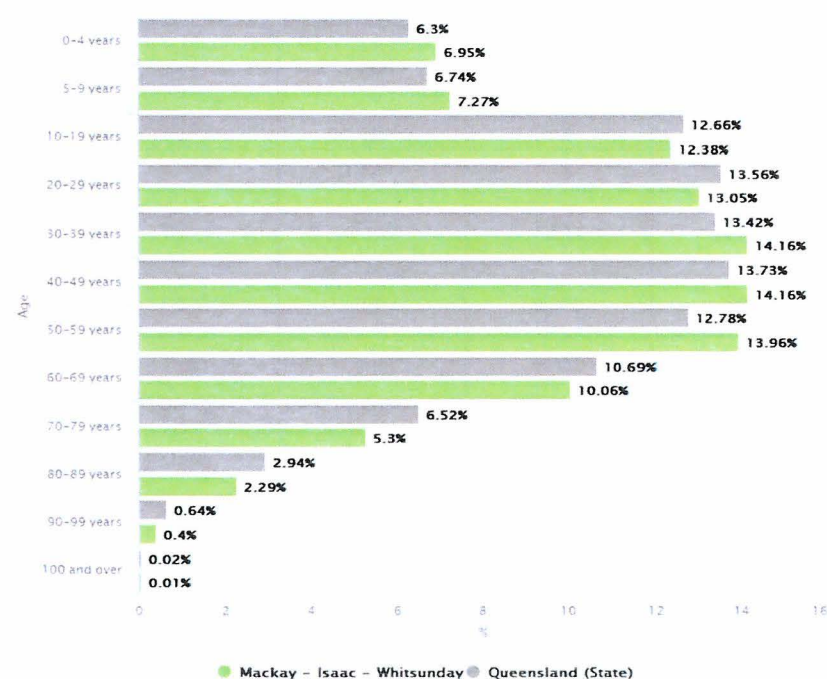

Source: Australian Bureau of Statistics 2016 Census of Population and Housing, REMPLAN Community.

Changes in MIW population (2011-2018)

The total number of people usually resident in Mackay - Isaac - Whitsunday is **172,523**. This represents an increase of 5,712 people (**3.42%**) from the 2011 Census population of **166,811** people.

This compares to an increase of 370,455 people (**8.55%**) people usually resident in Queensland (State).
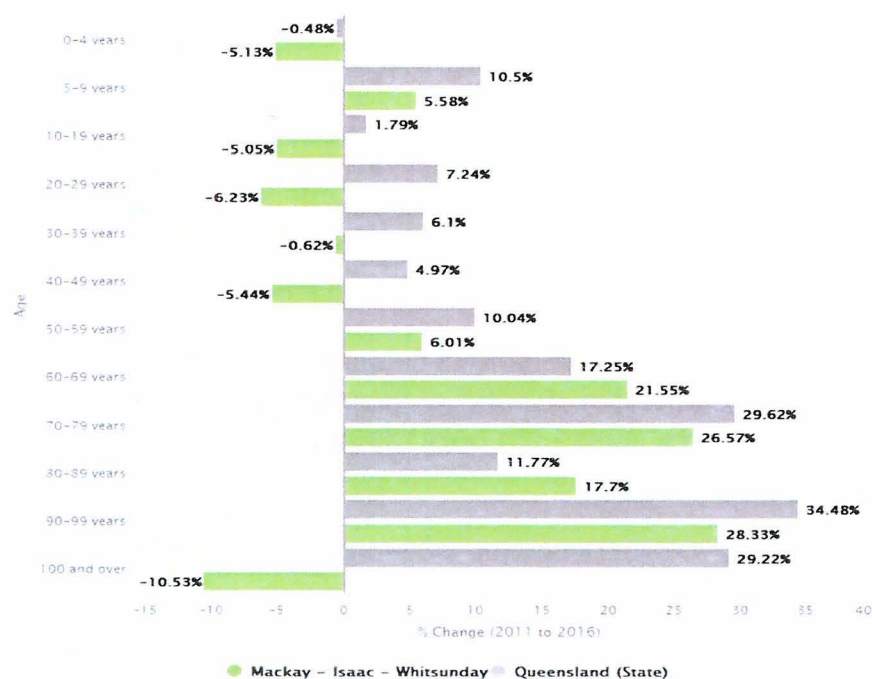
Source: Australian Bureau of Statistics 2016 Census of Population and Housing, REMPLAN Community.

Employment MIW

It is estimated that **85,165** people work in Mackay - Isaac - Whitsunday (SA4).

Mackay - Isaac - Whitsunday (SA4) represents **4.00 %** of the **2,130,837** people working in Queensland and **0.80 %** of the **10,683,322** people working in Australia .

Of the total 85,165 jobs in Mackay - Isaac - Whitsunday (SA4) there are:
- 21,462 jobs in Isaac (25.20 %)
- 47,975 jobs in Mackay (56.33 %)
- 15,805 jobs in Whitsunday (18.56 %)

Source: REMPLAN 2018 - The employment data presented above represents the number of people employed by businesses / organisations in each of the industry sectors in the defined regions. In this report the employment data is place of work data and represents total numbers of employees without any conversions to full-time equivalence.

Industry	Mackay - Isaac - Whitsunday (SA4)	Isaac	Mackay	Whitsunday
Mining	16,591	13,080	2,623	924
Retail Trade	7,610	537	5,454	1,597
Health Care & Social Assistance	7,576	492	5,948	1,164
Accommodation & Food Services	7,050	947	3,337	2,727
Construction	6,135	848	3,988	1,295
Education & Training	5,881	806	4,038	1,035
Transport, Postal & Warehousing	5,235	591	3,357	1,325
Agriculture, Forestry & Fishing	4,672	1,160	1,873	1,646
Manufacturing	4,669	423	3,542	666
Other Services	3,730	440	2,715	585
Public Administration & Safety	3,461	488	2,407	563
Administrative & Support Services	3,101	777	1,536	808
Professional, Scientific & Technical Services	2,868	237	2,199	463
Wholesale Trade	2,488	197	2,045	222
Total	**81,067**	**21,023**	**45,062**	**15,020**

MIW Unemployment Rate
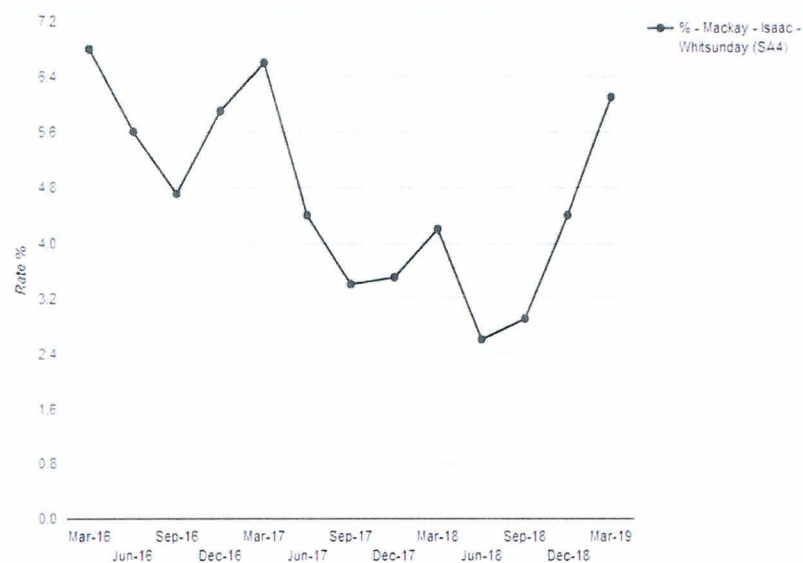
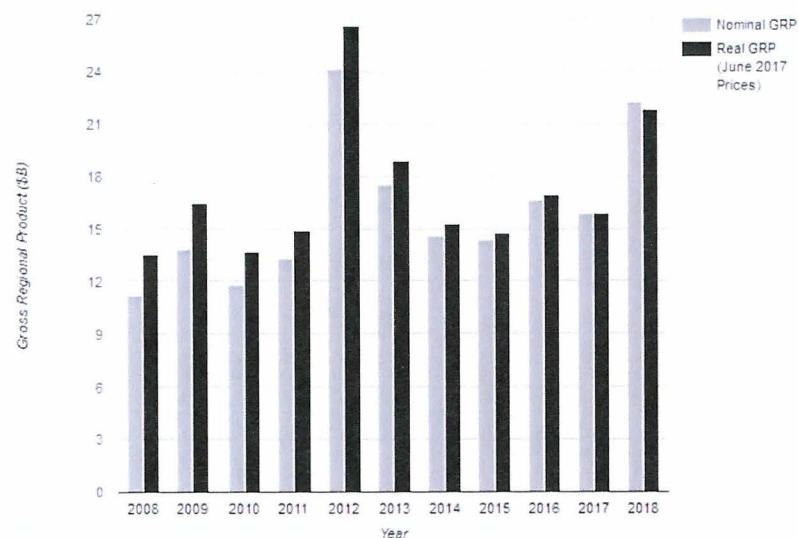| Local Government Area	Jun 15	Jun-16	Jun-17	Jun-18	Jun-19
Isaac	3.0	2.7	2.1	1.5	1.6
Mackay	7.6	7.3	6.0	3.8	4.4
Whitsundays	9.5	7.9	5.7	3.4	4.0
Qld	6.3	6.5	6.2	6.1	6.4

Source: Department of Jobs and Small Business

The Small Area Labour Markets (SALM) data has been compiled by Australian Government Department of Jobs and Small Business (DJSB). SALM data incorporates three primary datasets:
1. Centrelink data on people in receipt of Newstart or Youth Allowance (Other), by postcode (not including people in receipt of the Community Development Employment Projects Participant Supplement)
2. ABS Labour Force Survey data at the ABS Labour Force Region level
3. ABS Census of Population and Housing labour force data at the Statistical Local Area level, Statistical Area 2 level and Local Government Area level.

The estimates presented have been smoothed by Department of Jobs and Small Business using a four-quarter average to minimise the variability inherent in the estimates at the Statistical Local Area level, Statistical Area 2 level and Local Government Area level.

Gross Regional Product MIW

GRP Expenditure Method	Mackay - Isaac - Whitsunday (SA4)	Queensland	Australia
Household Consumption	$8,137.025 M	$224,931.132 M	$1,177,769.834 M
Government Consumption	$2,795.648 M	$73,431.046 M	$385,954.873 M
Private Gross Fixed Capital Expenditure	$3,056.215 M	$75,183.325 M	$395,964.494 M
Public Gross Fixed Capital Expenditure	$738.441 M	$19,396.027 M	$101,945.861 M
Gross Regional Expenses	$14,727.329 M	$392,941.531 M	$2,061,635.061 M
plus Regional Exports	$22,694.771 M	$118,647.933 M	$471,223.529 M
minus Domestic Imports	-$12,766.187 M	-$108,402.737 M	-$375,884.697 M
minus Overseas Imports	-$2,374.466 M	-$54,217.726 M	-$309,298.893 M
GRP/GSP/GDP	$22,281.447 M	$348,969.000 M	$1,847,675.000 M
Population	169,688	4,690,682	23,356,682
Per Capita GRP/GSP/GDP	$131,308	$74,396	$79,107
Per Worker GRP/GSP/GDP	$261,627	$163,771	$172,949

GRP is the net measure of wealth generated by the region. GRP can be measured by using the incomes approach, where all incomes earned by individuals (wages and salaries), firms (gross operating surplus) and governments (taxes on products or services) are added. Alternatively an expenditure approach can be taken where all forms of final expenditure, including consumption by households, consumption by governments, additions or increases to assets (minus disposals) and exports (minus imports), are added.
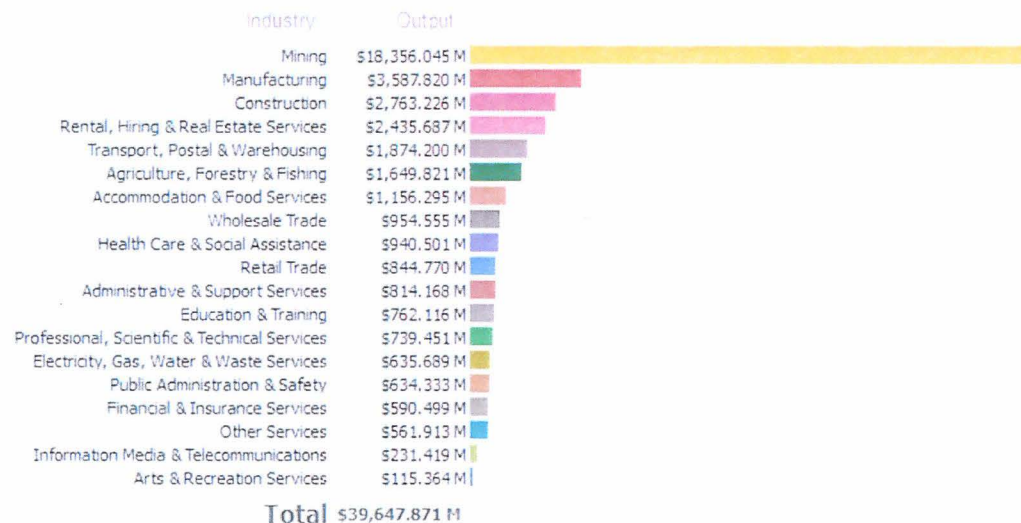
Economic Output

The output generated by the Mackay - Isaac - Whitsunday (SA4) economy is estimated at **$39.648 billion**. This is up by by 5 billion from 2017. Mackay - Isaac - Whitsunday (SA4) represents **5.75 %** of the **$689.862 billion** in output generated in Queensland and **1.09 %** of the **$3.643 trillion** in output generated in Australia .Of the total $39.648 billion output generated in Mackay - Isaac - Whitsunday (SA4):

•$17.641 billion output is generated in Isaac (44.49 %)
•$16.477 billion output is generated in Mackay (41.56 %)
•$5.576 billion output is generated in Whitsunday (14.06 %)

All Industries, All Zones

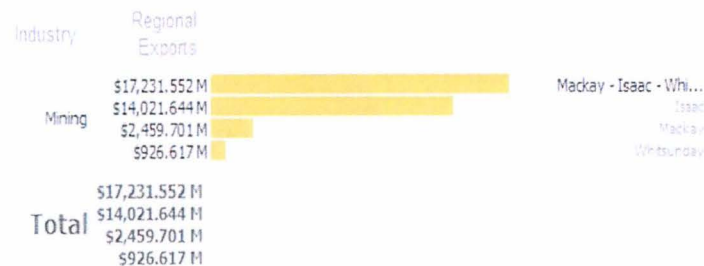| Industry	Output
Mining	$18,356.045 M
Manufacturing	$3,587.820 M
Construction	$2,763.226 M
Rental, Hiring & Real Estate Services	$2,435.687 M
Transport, Postal & Warehousing	$1,874.200 M
Agriculture, Forestry & Fishing	$1,649.821 M
Accommodation & Food Services	$1,156.295 M
Wholesale Trade	$954.555 M
Health Care & Social Assistance	$940.501 M
Retail Trade	$844.770 M
Administrative & Support Services	$814.168 M
Education & Training	$762.116 M
Professional, Scientific & Technical Services	$739.451 M
Electricity, Gas, Water & Waste Services	$635.689 M
Public Administration & Safety	$634.333 M
Financial & Insurance Services	$590.499 M
Other Services	$561.913 M
Information Media & Telecommunications	$231.419 M
Arts & Recreation Services	$115.364 M
Total	**$39,647.871 M**

Source: REMPLAN 2018 - Output data represents the gross revenue generated by businesses/organisations in each of the industry sectors in a defined region. Gross revenue is also referred to as total sales or total income.

Regional Exports

The value of regional exports generated by the Mackay - Isaac - Whitsunday (SA4) economy in 2018 is estimated at **$22.227 billion**.

Industries: Mining. **Zones**: All.

Industry	Regional Exports	
Mining	$17,231.552 M	Mackay - Isaac - Whi...
	$14,021.644 M	Isaac
	$2,459.701 M	Mackay
	$926.617 M	Whitsunday

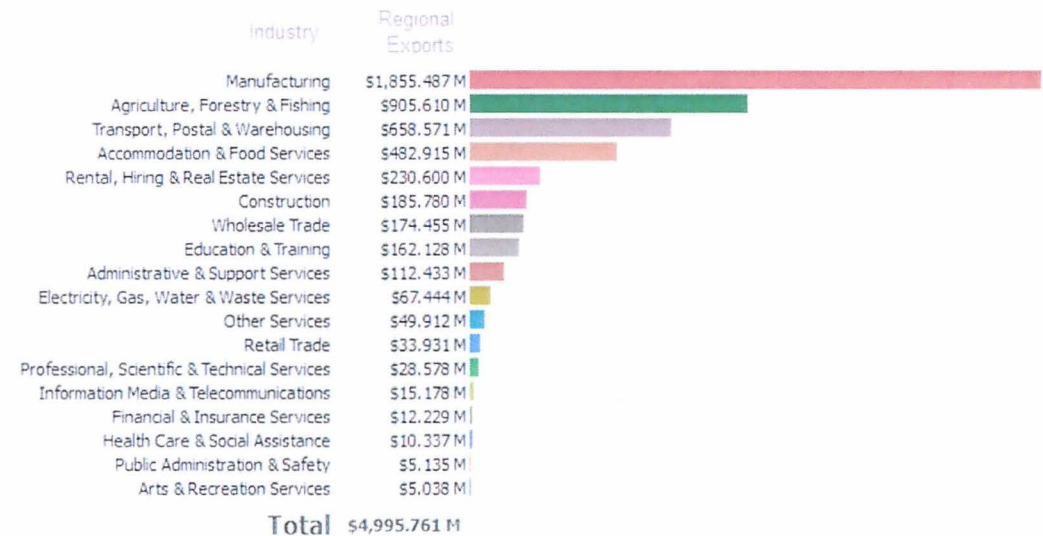| Total	
	$17,231.552 M
	$14,021.644 M
	$2,459.701 M
	$926.617 M

Source REMPLAN 2018 - Regional Exports data represents the value ($) of goods and services exported outside of the defined region that have been generated by businesses / organisations in each of the industry sectors within the region. No distinction is made between domestic and international exports.
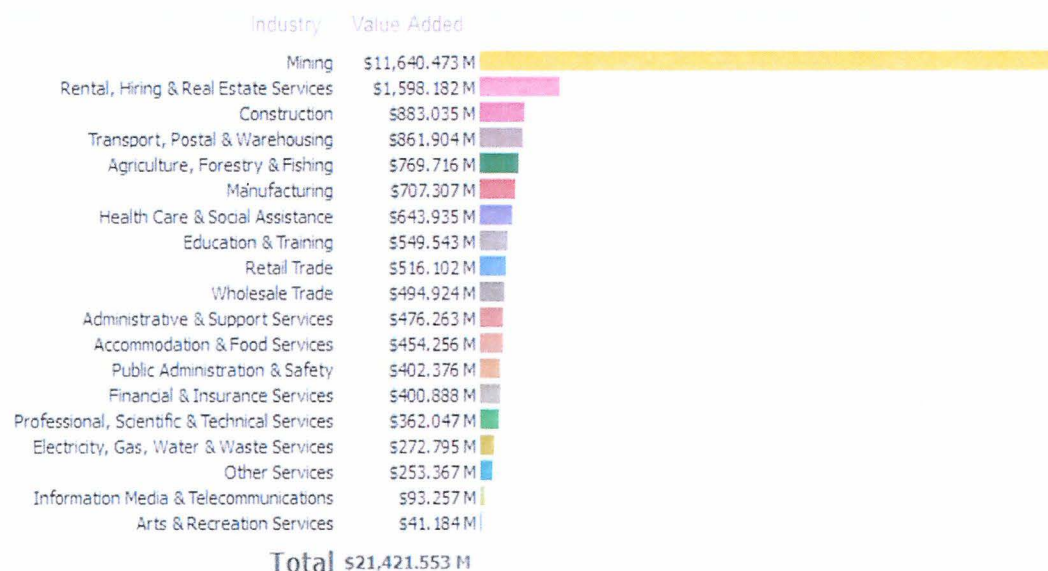
Industries: Agriculture, Forestry & Fishing, Manufacturing, Electricity, Gas, Water & Waste Services, Construction, Wholesale Trade, Retail Trade, Accommodation & Food Services, Transport, Postal & Warehousing, Information Media & Telecommunications, Financial & Insurance Services, Rental, Hiring & Real Estate Services, Professional, Scientific & Technical Services, Administrative & Support Services, Public Administration & Safety, Education & Training, Health Care & Social Assistance, Arts & Recreation Services, Other Services. **Zones**: All.

Industry	Regional Exports
Manufacturing	$1,855.487 M
Agriculture, Forestry & Fishing	$905.610 M
Transport, Postal & Warehousing	$658.571 M
Accommodation & Food Services	$482.915 M
Rental, Hiring & Real Estate Services	$230.600 M
Construction	$185.780 M
Wholesale Trade	$174.455 M
Education & Training	$162.128 M
Administrative & Support Services	$112.433 M
Electricity, Gas, Water & Waste Services	$67.444 M
Other Services	$49.912 M
Retail Trade	$33.931 M
Professional, Scientific & Technical Services	$28.578 M
Information Media & Telecommunications	$15.178 M
Financial & Insurance Services	$12.229 M
Health Care & Social Assistance	$10.337 M
Public Administration & Safety	$5.135 M
Arts & Recreation Services	$5.038 M

Total	$4,995.761 M

Value added

Industry	Value Added
Mining	$11,640.473 M
Rental, Hiring & Real Estate Services	$1,598.182 M
Construction	$883.035 M
Transport, Postal & Warehousing	$361.904 M
Agriculture, Forestry & Fishing	$769.716 M
Manufacturing	$707.307 M
Health Care & Social Assistance	$643.935 M
Education & Training	$549.543 M
Retail Trade	$516.102 M
Wholesale Trade	$494.924 M
Administrative & Support Services	$476.263 M
Accommodation & Food Services	$454.256 M
Public Administration & Safety	$402.376 M
Financial & Insurance Services	$400.888 M
Professional, Scientific & Technical Services	$362.047 M
Electricity, Gas, Water & Waste Services	$272.795 M
Other Services	$253.367 M
Information Media & Telecommunications	$93.257 M
Arts & Recreation Services	$41.184 M
Total	**$21,421.553 M**

The total value added by the Mackay - Isaac - Whitsunday (SA4) economy is estimated at **$21.422 billion**. Mackay - Isaac - Whitsunday (SA4) represents **6.58 %** of the **$325.791 billion** value added in Queensland and **1.24 %** of the **$1.726 trillion** value added in Australia .Of the total $21.422 billion value added in Mackay - Isaac - Whitsunday (SA4):

• $10.696 billion value is added by Isaac (49.93 %)
• $8.062 billion value is added by Mackay (37.63 %)
• $2.698 billion value is added by Whitsunday (12.59 %)

Source: REMPLAN 2018 - Value-Added data represents the marginal economic value that is added by each industry sector in a defined region. Value-Added can be calculated by subtracting local expenditure and expenditure on regional imports from the output generated by an industry sector, or alternatively, by adding the Wages & Salaries paid to local employees, the gross operating surplus and taxes on products and production. Value-Added by industry sector is the major element in the calculation of Gross Regional Product.

Regional Economic Drivers - Advantages, Challenges and Opportunities

Resources - Minerals, Water, Energy and Gas
- **Advantages** – High quality base supply, industry critical mass,
- **Challenges** - Access to workforce (skills and people), Freight Productivity, Green and Red Tape, Social License, General Image
- **Opportunities** - Innovation and Automation (productivity increase), Renewables Growth, New infrastructure,

METS
- **Advantages** - High quality service suppliers, SME Structures, Growth Sector (currently)
- **Challenges** - Access to workforce (current and future skills), SME Structures, Peaks and Lows of Sector
- **Opportunities** - Innovation and Automation, Growth of other industries and METS service diversification (defence, renewables, exports)

Agriculture
- **Advantages** – Arable land, Market Recognition, Proximity to Asia, Climate conducive to range of agribusiness, critical mass in major commiodities,
- **Challenges** - SME ownership, Aging ownership, Freight Productivity, Insurance, Declining Terms of Trade, Poor Economies of Scale, Access to workforce - Skills and People, Green and Red Tape, Social license, Global Commodity Price, Climate Extremes, Cost Effective Water and Energy, Freight Productivity and Connectivity.
- **Opportunities**– SME ownership, Innovation and Automation (lower cost of production), Bio-Futures, Reform and Redevelopment, New Export Options, Regional Brand, Agri-Tourism and Provence Food.

Tourism
- **Advantages** – Iconic Natural Assets, Market recognition (safe, clean and green), close proximity to Asia, Quality Products.
- **Challenges** - Natural Disasters, Ageing Infrastructure, Cost of Business, Access to workforce (skills and people), Business Capabilities and Collaboration.
- **Opportunities** - Global tourism growth (4% over next 5 years) - Asian middle class, Invest in infrastructure (aviation, cruise and roads), Innovation and Automation, Growth of quality products, events and experiences.

Construction
- **Advantages** – Large register of projects in MIW region, reasonable availability of workers (some conjecture over numbers)
- **Challenges** - Skilled labour shortage predicted by 2021, SME Issues - ability to maintain strong cash flow, decreasing profit margins, planning and safety, high cost of insurance, lack of business planning, increasing material costs and adapting to technology.
- **Opportunities** – Large register of projects aligned to resource and infrastructure projects, increase in tourism numbers and increase in building approvals and renewable energy projects, use of technology to improve productivity.

Regional Economic Enablers — Current, Challenges and Opportunities

Health Care and Social Assistance
- **Current State** - Public and private investment is considerably below that of the average for Qld, lack of linkages between worker health and productivity, need more infrastructure to support health services and professional, hard to get qualified doctors
- **Challenges** - Access to workforce (skills and people), demographic changes(aging population), shifts in health market share, community expectations, public v/s private
- **Opportunities** - Growth in public health needs/infrastructure, digital hospital services, growth of public investment to MIW region.

Education, Training and Jobs
- **Current State** – Public and private investment is on a par with Qld average but the investment is not keeping pace with skilled workforce needs, Qld STEM education levels are behind other states and East Asian neighbours, over 80% of Qld primary school teachers have no tertiary education in Science, 49% of Qld students achieve proficient standards in scientific literacy, % in MIW are lower again.
- **Challenges** - Declining traineeships and apprenticeships, increasing loss of youth (18-25) from the region, changes in technology /digital skills, ageing population that is working longer, innovation and automation (reducing roles in traditional jobs), most of the
- **Opportunities** - Professional status of teaching, reducing disparities between schools, equipping students for improved STEM and digital skills, Automation (reskilling), STEM Skills in workforce transition, across Qld it is predicated that 2/3 of jobs will come from five industries - health care and social assistance, professional, scientific and technical services, education and training, tourism and hospitality and construction – MIW will differ a little as a result of regional economy dependence on mining and METS but current and future automation and robotics will require broader skills.

Transport, Postal and Warehousing
- **Current State** – freight task capacity constraints, inadequate infrastructure, focus toward improved efficiencies and forward planning,
- **Challenges** – Freight task in 2020 will be double what is was 2006 and by 2050 it will be triple its current size, increased diversity in modular share of freight, therefore requirements for infrastructure, regulatory burden, carbon foot print,
- **Opportunities** – increasing private sector investment, intermodal facilities and forward planning

Connectivity and Communications
- **Current State** - Platforms and systems to drive tech coalition
- **Challenges** - Improving digital awareness and skills, Black spots and or slow processing speed in fundamental services (mobile and internet)
- **Opportunities** – Improve digital Literacy, Regional Audits and Strategeis to reducing

What is being done – Collaborative activity between stakeholders, government, and industry

Resources - Minerals, Water Energy and Gas
- Identification of community support programs
- Supporting introduction of innovation and automation – community support
- Freight and Transport Infrastructure Upgrades
- Energy and Water Infrastructure Auditing, Planning and Development

METS
- Resource Centre of Excellence
- MIW METS Export Hub Study
- METS Ignited Cluster Project
- Job and Employment Plans

Agribusiness
- Growing Greater Whitsunday Agribusiness (Stage 1 Report)
- Agribusiness Export Study (Stage 1 and Stage 2)
- Cropping Institute and Ag Tech Hub
- Commodity 10 Year Plans which include reform initiatives
- Horticulture processing of waste.
- Diversified Ag Industry Growth e.g. Aquaculture

Tourism, Accommodation and Food Services
- Marketing Strategies
- Open for Business Promotion
- Job and Employment Planning
- Business Skills Development
- Digital Skills and Connectivity Skills Development
- Agri-Tourism
- Event Tourism

Construction
- Government and Private Commitment to Infrastructure
- Trainees and Apprenticeship Schemes
- Business Skills Development
- Digital Skills and Connectivity Skills Development
- Good Data and Information – Metrics and Evidence

Health and Social Services
- New Investment toward health service infrastructure
- Research and Development toward new medical service solutions.
- Job and Employment Planning
- Cost of Living
- Indigenous Health
- Personal Health and Impact on Productivity

New Industries
- Bio-Futures
- Renewables
- Aviation and Aero Space
- Waste to Energy

Education, Training, Skills and Jobs
- Good Data and Information – Metrics and Evidence
- Commodity Sector Specific Job Planning
- Jobs for Future - Analysis, Planning and Awareness

Transport, Postal and Warehousing
- Government Investment in Core Transport Infrastructure
- Review of regional freight task and required investment to manage.

Retail Trade
- Trainees and Apprenticeship Schemes
- Business Skills Development
- Digital Skills and Connectivity Skills Development
- Socially Conscious Consumers

Connectivity and Communications
- Platforms and systems to drive tech coalition
- Improving digital awareness and skills
- Removing Black Spots – Audit of Connectivity and Infrastructure needs.

Sustainability
- Adaptation to Climate Change – business robustness
- GBR and Food Sustainability
- Marketing Regional Brand - based on our environment and systems – premium and preferential market access.