



Great South Coast Walk

OPPORTUNITY ANALYSIS

November 2019



The Great South Coast Walk Opportunity Analysis has been prepared by TRC Tourism to support the development of a Business Case and Action Plan for the development Great South Coast Walk.

Acknowledgments

We acknowledge the Traditional Custodians of the NSW South Coast. We acknowledge and respect their continuing culture and the contribution they make to the region.

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Executive Summary

The unspoilt nature of the NSW South Coast region makes it the state's third most popular tourism destination. An extensive network of National Parks and State Forests located close to the coast provide a growing range of nature-based activities, including bushwalking, swimming and snorkelling. It is complemented by a wide variety of high-quality coastal, estuarine, lake and river environments, beaches, walking and cycling trails, food and drink, adventure, cultural and heritage experiences. It has good existing road links to major markets: Canberra, Greater Sydney and the Western Sydney growth corridor and is close to Sydney and Canberra international airports.

Leveraging current investment

Significant investment in walking track infrastructure has been made by the NSW State Government and the local governments in the region in the last few years. This investment includes the establishment or upgrade of the following walks:

- the Royal Coastal Track, Sydney South
- the Grand Pacific Walk, Wollongong
- the Kiama Coastal Walk, Kiama
- Shoalhaven Round the Bay, Shoalhaven
- the Murramarang South Coast Walk
- the Bingie Dreaming Track, Tuross Heads
- the Light to Light, Ben Boyd National Park
- and many other walking tracks across the region.

Destination Sydney Surround South and Destination Southern NSW believe there is a significant opportunity to leverage this investment and position the NSW South Coast as a premium coastal walking destination.

The Great South Coast Walk is a concept¹ that connects the many high-quality walking and nature-based experiences the region has to offer. It links 660 km of walking track along the southern coastline of New South Wales, from Bundeena on the southern fringe of Sydney to Mallacoota in Victoria. It covers seven local government areas and includes many coastal villages, towns and popular tourism destinations. Many of the elements of the Great South Coast Walk concept are already in place with well-established and popular walks such as the Royal Coastal Track, Grand Pacific Walk, Murramarang South Coast and the Light to Light walk providing significant parts of the walk and neighbouring towns providing visitor services.

The Destination Networks believe that the Great South Coast Walk² has the potential to become the first recognised 'Great Walk' in mainland NSW. They believe it will activate various national, state and regional tourism and economic development strategies and respond to identified opportunities and challenges that will drive sustainable tourism on the NSW South Coast.

This report aims to assess the potential of the Great South Coast Walk to:

- become the first mainland NSW 'Great Walk' that will appeal to domestic and international visitors
- stimulate low season and mid-week visitation and increase repeat visitation for both domestic and international markets
- increase the average length of stay and overnight expenditure of domestic and international visitors to the region
- stimulate industry investment to package, promote and sell walking experiences to drive the visitor economy; and
- generate other benefits for communities on the South Coast.

¹ The concept has been developed by David Briese, an experienced walker and advocate for the economic and social benefits that long-distance walks can generate.

² The Great South Coast Walk is a working title only

Overview of the Concept

The Great South Coast Walk is a concept that connects existing and proposed coastal walking tracks on the NSW South Coast including:

- the Royal Coastal Track (Sydney South)
- the Grand Pacific Walk (Wollongong)
- Kiama Coastal Walk (Kiama)
- Murramarang South Coast Walk (Shoalhaven and Batemans Bay)
- the Bingie Dreaming Track (Tuross Heads)
- the Light to Light Walk (near Eden) and;
- other coastal walks in the region.

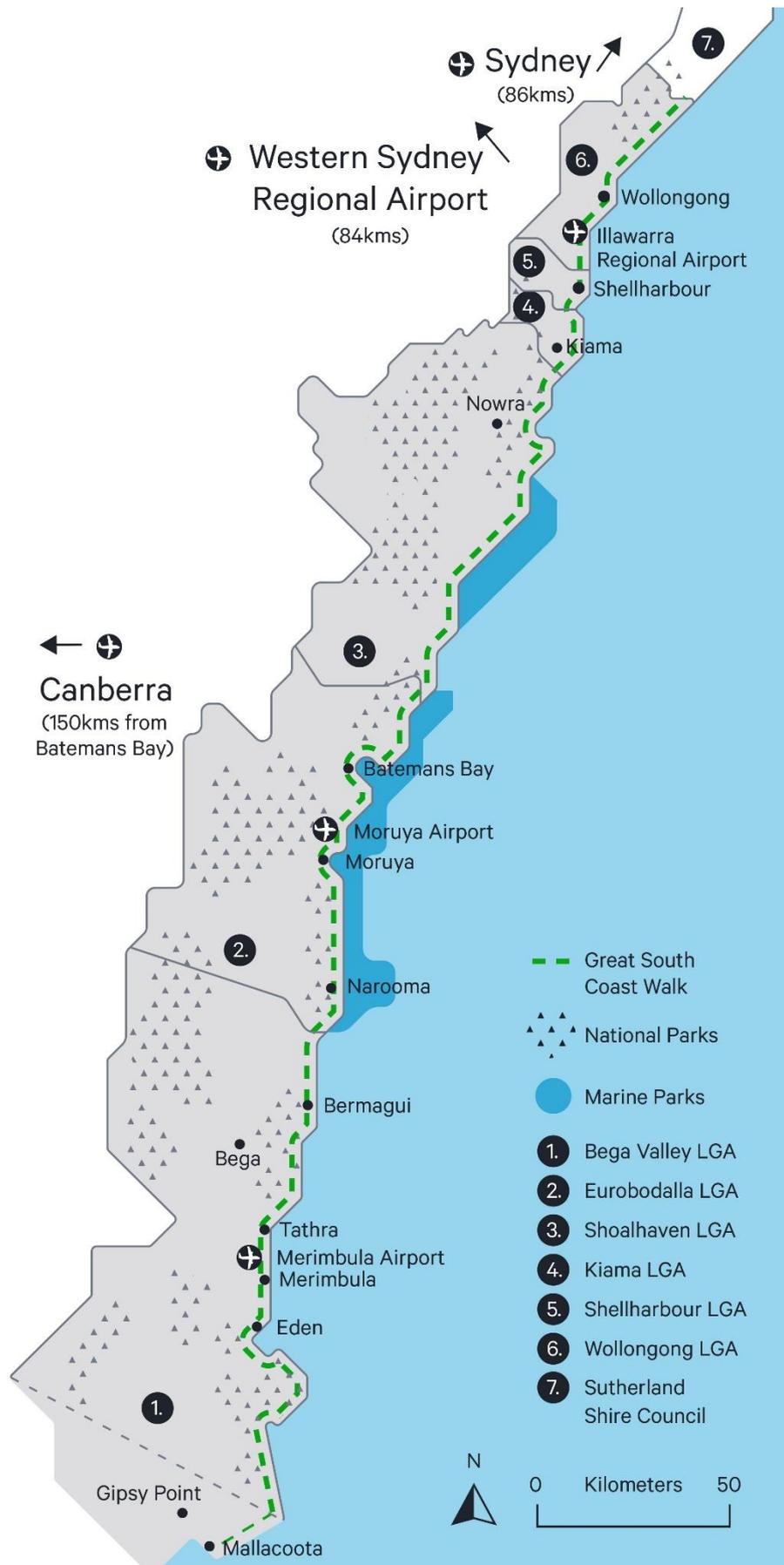
It covers seven local government areas and includes many coastal villages and towns. The walk is currently promoted as an experience that can be completed in eleven sections with each section averaging 60 km.

In the main, each of these walks start and finish in or close to local towns and villages which have the potential to become walking 'hubs' for visitors.

A dedicated website currently promotes the walk and includes information on track routes, points of interest, places to stay, track conditions, itineraries, highlights and 'track issues' and alternative routes.

Features

- 660 kms in length
- 60 walks of varying length
- 400 beaches
- 91 coastal lakes
- 12 national parks and 6 nature reserves
- 400 significant wetlands
- 3 major bays (Jervis, Batemans and Two-Fold), many harbours and marine hubs



The global demand for walking is on the rise

Walking is a part of the global ‘adventure travel’ market which has doubled in size in the past five years³.

The World Travel and Tourism Council identifies walking and outdoor adventure as one of the world’s high growth and value tourism sectors.

Based on the UNWTO estimates of the global walking market, Australia captures less than 1% of the global trade in extended walks (multi-day), whereas our neighbours in New Zealand capture nearly twice that share. This includes a growing trend towards ‘destination’ walks where a single location becomes the primary reason for travel to a country (e.g. The Camino Way).

The provision of new guided and accommodated walks is one of the fastest growing products in Australia and elsewhere. While small, this market is being targeted in every other Australian State and Territory, and increasingly in other international destinations with many new walking experiences under development.

Multi day walking on the rise in NSW

Overall, NSW is the most popular destination in Australia for walking visitors, receiving 34% of the country’s walking visitor market.

Walking tourism in Australia has experienced significant growth in recent years.

The walking market to Australia increased by 12% between 2017 and 2018 with the largest increase in domestic day visitors, up 18% over the same period.

NSW receives over one third of walking visitors to Australia. This market has grown by 41% since 2014.

With the right investment this growth is predicted to continue.

Strategic alignment with national and state tourism strategies

Internationally the South Coast Region offers products that deliver on Tourism Australia’s Experience Themes. In particular, the Great South Coast Walk is perfectly positioned to leverage Tourism Australia’s Coast and Aquatic and Nature based campaign activity. It also offers the potential to tap into Tourism Australia’s Signature Experiences Program. It also activates the NSW Visitor Economy Action Plan and the NSW Marine Tourism Strategy.

Whilst there are many multi day walks in NSW, none are promoted internationally as a signature walking experience, except for the Seven Peaks Walk on Lord Howe Island.

NSW is the only state without a multi-day walk that is considered iconic or nationally significant.⁴ The Great South Coast Walk presents this opportunity.

The Great South Coast Walk presents a significant opportunity

The South Coast region has over sixty high - quality coastal walks managed by local, state and commonwealth governments. Leveraging this significant investment in walking track infrastructure presents a significant opportunity for tourism to the region.

The analysis suggests that there is an opportunity for the NSW South Coast to position itself as Australia’s premier coastal walking destination through the development of the Great South Coast Walk. It has a well-established walking market and well-developed infrastructure to support growth.

To capitalise on the market growth and existing walking trail investment the South Coast Region needs:

- a ‘signature’ walking experience that includes a range of product options from short walks (under 1

³ United Nations World Travel Organisation 2019

⁴ Seven Peaks walk is a multi-day walk located on Lord Howe Island

hour) and day-walks (up to 8 hours), and multi-day or 'extended' walks

- co-ordinated investment in walking tracks and services that support the signature experience

Strong positioning and co-ordinated marketing to position the south coast as Australia's premier walking destination. This could include a package of walks (i.e. Great South Coast Walk Concept) as well as a package of short walks (e.g. Great South Coast Short Walks) to leverage the significant investment and popularity of walking in the region. This will have a much stronger pulling power and provide cut through in the competitive market walking market.

The region's existing walking experiences are of such high quality that if they are collectively presented to the market, they have the pulling power to position the region as Australia's premium coastal walking destination.

Many of the elements of the Great South Coast Walk concept are already in place with well-established and popular walks such as the Royal Coastal Track, Grand Pacific Walk, Murramarang South Coast and the Light to Light walk providing significant parts of the walk and neighbouring towns providing visitor services. The analysis concludes that with the right level of public and private sector investment the Great South Coast Walk:

- offers the potential to be NSW's first signature coastal walk presented as a collective of existing leading and supporting trails that include a range of product options from short walks (under 1 hour) and day-walks (up to 8 hours), and multi-day or 'extended' walks
- offers stunning and recognised imagery along many parts of the walk and connects with a series of well recognised regional trail experiences which are at the core of the South Coast nature tourism offering
- provides the 'hook' that the existing local and regional trails need to provide national and international status

- has the potential to achieve a status that will increase repeat visitation and extend the walking season, particularly in the shoulder and off - peak periods
- is readily accessible to Sydney and Canberra markets enabling easy access for short stay visitors whose primary reason for visiting the region is to undertake a walk
- connects well-established trails and tourism destinations with existing infrastructure and services to support visitors, community, families and young people
- offers many opportunities to integrate with other experiences such as wildlife viewing, food and wine and marine activities
- has the potential to be integrated with Aboriginal experiences offered by traditional custodians
- offers a range of options to suit a variety of preferences by adjusting the walk lengths, trail types and additional activities suited to different users
- offers the potential for an integrated mix of land and marine-based experiences such as sea kayaking, scuba-diving, whale watching and eco-boat cruises
- is supported by existing commercial tour operators and local businesses who see the opportunity to expand their offering to appeal to the high value walking market
- is supported by an established market presence via the existing website (greatsouthcoastwalk.net.au) through social media and word of mouth via bushwalking groups and print media⁵.

Consultation with commercial tour operators currently offering walks, nature-based experiences, accommodation and transport for visitors to the South Coast support the concept.

⁵Time to Walk the Walk on the Coast, Tim the Yowie Man, Canberra Times in October 2019

Current Status

(Where we are now)

The South Coast's walking experiences are developed and promoted separately

- Walking tracks are a strategic priority for all local and state governments
- Individual walks are developed and promoted independent of each other
- Competing for the same market
- Competing for same funds
- No distinctive offering
- Offering is diluted competitive market place
- No single portal for information and booking
- No national or signature experiences that define the region
- Visitors choose 'easier and bookable options' eg Tasmania, New Zealand
- Limited economic benefit from trail network

Potential Opportunity

(Where we want to be)

The South Coast is positioned as Australia's premier coastal walking destination

- One umbrella brand of Great South Coast Walk
- The power of collective marketing, provides cut through
- Signature experiences with leading walks and supporting experiences
- A premium collection of short walks
- Step on /Step off walking opportunities –aspirational and bucket list of must do's
- One portal with all information for walking on the south coast
- Supported by quality accommodation offering
- Meets different needs of market
- Improved links to towns, villages with economic and employment benefits
- Encourages low season, mid-week and repeat visitation
- Offers integrated land and marine experiences
- Commercial operators packaging, promoting and selling multi-day South Coast Walks

The Vision

The Great South Coast Walk is Australia's ultimate coastal walking adventure on the edge of the largest island on earth

Ambition

The Great South Coast Walk will expose visitors to the wild coastal beauty that has no equal in the world. It will leverage five well established walks of Royal Coast Walk, Grand Pacific Walk, Kiama Coastal Walk, Murramarang Coastal Walk and the Light to Light Walk. As other walks are developed or extended, they can be added.

It will be the catalyst for an exceptional array of nature and marine based adventure opportunities that create an outstanding experience for a range of markets.

It will be presented as iconic 3-4 day walks as well as longer walking options to create aspiration and encourage repeat visitation.

It will be a flexible experience tailored to meet the needs and preferences of different visitors and markets in relation to the overall duration of the experience, the length of daily segments and the location and type of accommodation.

It will appeal to a range of markets and will include:

- **Day walks:** Taking an hour-long amble or all day rigorous walk and returning to accommodation the same day
- **Multi-day walks:** From backpacking on a one-night overnight trip to section-hiking large portions of the Great South Coast Walk. Multi-day walkers can tackle any stretch of the Great South Coast Walk
- **The Through Walk:** Walking the entire Great South Coast Walk supported by commercial operators who arrange for transfers to and from walking tracks and accommodation.

It will be a self-guided experience using campsites or off-trail accommodation or through commercial accommodation supported commercial tour operators providing transfers, transport, accommodation and regional food and wine and other services.

The Benefits of the Great South Coast Walk

The broad and growing appeal of walking trails to domestic and international visitor markets, as well as residents for recreational purposes, means that the Great South Coast Walk has great potential to boost the regional economy and generate business opportunities and jobs if they are developed into quality, well-marketed tourism experiences.

Investment in the Great South Coast Walk has the potential to attract 1 million additional visitors to the region, generating up to \$80 million in tourism expenditure and 530 additional jobs in the South Coast Region.

Increased visitation and expenditure in the region as a result of the Great South Coast Walk will benefit existing operators and attract further investment from the private sector to develop products and services to meet the needs of visitors. This could include transport, merchandise, accommodation, food and beverages, and guiding services. An increased length of stay for existing markets will improve the occupancy rate of accommodation facilities and may result in investment in new accommodation infrastructure to meet market needs.

Trails also play an important part in improving health and wellbeing – enhancing the liveability of communities and providing prospective visitors with a reason to visit and stay.

Importantly, investment in the Great South Coast Walk will raise the profile of the South Coast Region as Australia's premier coastal walking destination and will support local, state and national governments efforts to encourage high-quality tourism experiences that attract high value visitors and generate economic and employment benefits.



POTENTIAL BENEFITS OF THE GREAT SOUTH COAST WALK AUSTRALIA'S PREMIER COASTAL WALKING EXPERIENCE



Figure 1. Potential Commercial Tourism Opportunities



Enabling Investment and Next Steps

Establishing the Great South Coast Walk to compete with other iconic walking experiences and 'Great Walks' will require the following critical actions:

- Commitment from stakeholders to work towards the shared vision, branding and marketing strategy, and consumer information
- Development of tourism products and packages to support the Great South Coast Walk; and
- Continued investment in walking track infrastructure that will enable the best experiences with a focus on leading walking experiences, support experiences and, thirdly, gaps in the trail alignment of the Great South Coast walk.

The following recommendations address each of these issues as the first stage of implementation.

1. A Shared Vision - Leadership and Co-ordination

- a) Circulate the Opportunity Analysis and seek commitment to work towards the shared vision, branding and marketing strategy for the Great South Coast Walk.
- b) Establish a co-ordinating agency to lead the establishment of the Great South Coast Walk including branding and marketing.
- c) Establish roles and responsibilities of the co-ordinating agency and stakeholders in the development of the Great South Coast Walk.
- d) Work with state government agencies to embed the concept of the Great South Coast Walk into strategic plans such as the NSW Nature Tourism Strategy and the South Coast Marine Tourism Strategy.

2. Brand Identity and Marketing

- a) Confirm the name of the walk and develop a brand strategy in consultation with stakeholders.
- b) Develop a marketing strategy to support the brand with appropriate messages for target audiences developed in partnership with stakeholders.

3. Commercial Opportunities

- a) Work with stakeholders to facilitate the development of existing and new commercial opportunities within the region that will support the Great South Coast Walk.
- b) Establish a 'walk friendly' town initiative to assist in growing yield and allowing easy access and dispersal of visitors to walking product.

4. Central Information / Booking Portal

- a) Work with partners to develop a centralised information and booking system for the Great South Coast Walk as part of the marketing strategy.

5. Continued investment

- a) Develop an investment strategy for the co-ordinated development of walking tracks and associated linkages and that support the development of the Great South Coast Walk as a continual trail from Sydney to the NSW border.

6. Measurable objectives and evaluation

- a) Establish and implement an evaluation framework to measure results of the Great South Coast Walk concept and value creation for local communities.



1. Introduction

The Great South Coast Walk is a concept that links existing and proposed coastal walking tracks from the southern rim of Sydney to the Victorian border offering walkers the most beautiful coastline, national parks and coastal villages Australia has to offer. The purpose of this report is to test the concept and determine its feasibility.

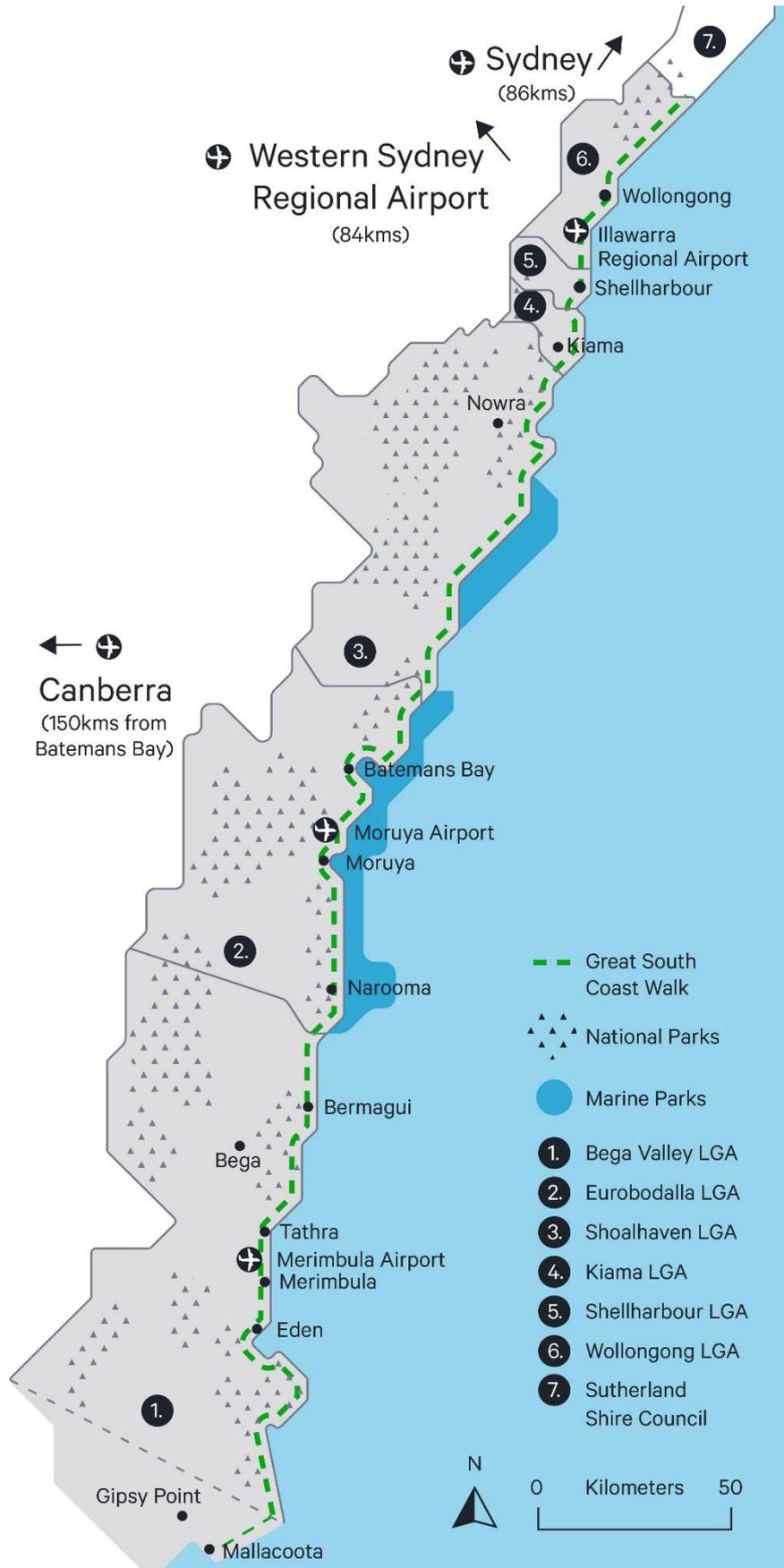
The South Coast is renowned for its natural beauty with unspoilt beaches interspersed with rugged headlands backed by coastal dunes protecting coastal lakes and estuaries. It has over 600km of coastline; numerous marine parks and expansive areas of breathtaking national and state parks. The landscape is characterised by rolling pasturelands, coastal villages and some of the most pristine and vulnerable ecosystems in Australia. The region incorporates the traditional lands the Yuin and Dharawal people and has significant cultural heritage values. The region's rich European heritage also contributes to its distinctive character.

The region is strategically located between three of the nation's main capital cities, approximately 2 to 7 hours from Sydney, 8 to 10 hours from Melbourne and just 2 – 4 hours from Canberra. The region generally has mild, pleasant weather. The summers are warm ranging in temperature from 20°C to 37°C while the winters generally range from 1°C to 12°C.

The Great South Coast Walk is a concept that links 660 km of existing and proposed coastal walking tracks on the NSW South Coast including the Royal Coastal Track (Sydney South), the Grand Pacific Walk (Wollongong), Kiama Coastal Walk, Murramarang South Coast Walk (Shoalhaven and Batemans Bay) and the Light to Light Walk near Eden. It covers seven local government areas and includes many coastal villages and towns (refer Figure 2).

The walk is currently promoted as an experience that can be completed in eleven sections with each section averaging 60 km. A dedicated website currently promotes the walk and includes information on track routes, points of interest, places to stay, track conditions, itineraries, highlights and 'track issues' and alternative routes. Walkers can curate their own experience or itinerary depending on their available time, skill, interest and location. Many of the elements of the Great South Coast Walk concept are already in place with well-established and popular walks such as the Royal Coastal Track, Grand Pacific Walk, Murramarang South Coast and the Light to Light walk providing significant parts of the walk and neighbouring towns providing visitor services. There are gaps in the walk and walkers are required to navigate several river crossings and short sections traversing private land and road corridors. Appendix F provides a description of the walk and the existing gaps in trail infrastructure.

Figure 2. Great South Coast Walk Concept



About this project

Destination Sydney and Surrounds (DSS) and Destination Southern NSW (DSNSW) engaged TRC Tourism to assess the Great South Coast Walk concept and its potential to become one of NSW's 'Great Walks'.

The study aims to assist the Destination Networks and their stakeholders determine if the Great South Coast Walk has the potential to:

- be developed into a walking product that will appeal to domestic and international visitors
- become a recognised 'Great Walk' by linking and promoting the collective of existing and proposed coastal walks
- stimulate low and shoulder season, mid-week visitation
- increase repeat visitation
- increase the average length of stay and overnight expenditure of domestic and international visitors to the region
- stimulate investment from the private sector to offer supporting services; and
- generate other benefits for communities along the NSW South Coast.

Methodology

The development of the report has involved four stages as outlined below.

Situation Analysis

This stage of the project involved a review of plans and strategies relating to economic development, tourism and specific recreation activities relevant to the study area. Specific recommendations relating to proposed infrastructure developments or other opportunities relevant to the study area were considered.

Data on existing visitor profiles, tourism trends and expenditure patterns were reviewed to identify the potential for walking tourism. The economic and community benefits of other long distance and multi day walking trails in Australia and overseas were also considered, together with their governance arrangements. Case studies of these walks are presented in Appendix E.

Site Analysis

The consultants undertook a field trip to the study area to gather technical and contextual information. This involved a review of local businesses, local transport, accommodation, food and other support services, followed by an analysis of opportunities for consideration.

Stakeholder Consultation

Consultation was undertaken with a range of stakeholders including local and state government representatives, tour operators, local businesses, tourism associations, walking groups and other stakeholders. The primary purpose of consultation was to gather information relating to the feasibility of the concept, opportunities and constraints associated with the existing trail network, proposed investment in new trails as well as current and proposed marketing and promotion. The stakeholders consulted are listed in Appendix A.

Opportunity Analysis Preparation

The final stage of the project involved compiling the findings and a draft report for consideration and discussion. The final report was prepared following feedback from the client.

Report Structure

The remainder of this report is presented in eight separate but related sections:

SECTION 2 - Market Analysis

Provides an overview of the market context for the Great South Coast Walk Concept

SECTION 3 - Characteristics of Exceptional Walks

Outlines the characteristics of successful walking trails

SECTION 4 - Assessment of the Great South Coast Walk

Provides an overview of the Great South Coast Walk Concept and an assessment of its potential

SECTION 5 - Establishing the Great South Coast Walk as an Australia's premier coastal walking experience

Presents a revised concept of the walk

SECTION 6 - Benefits of the Great South Coast Walk

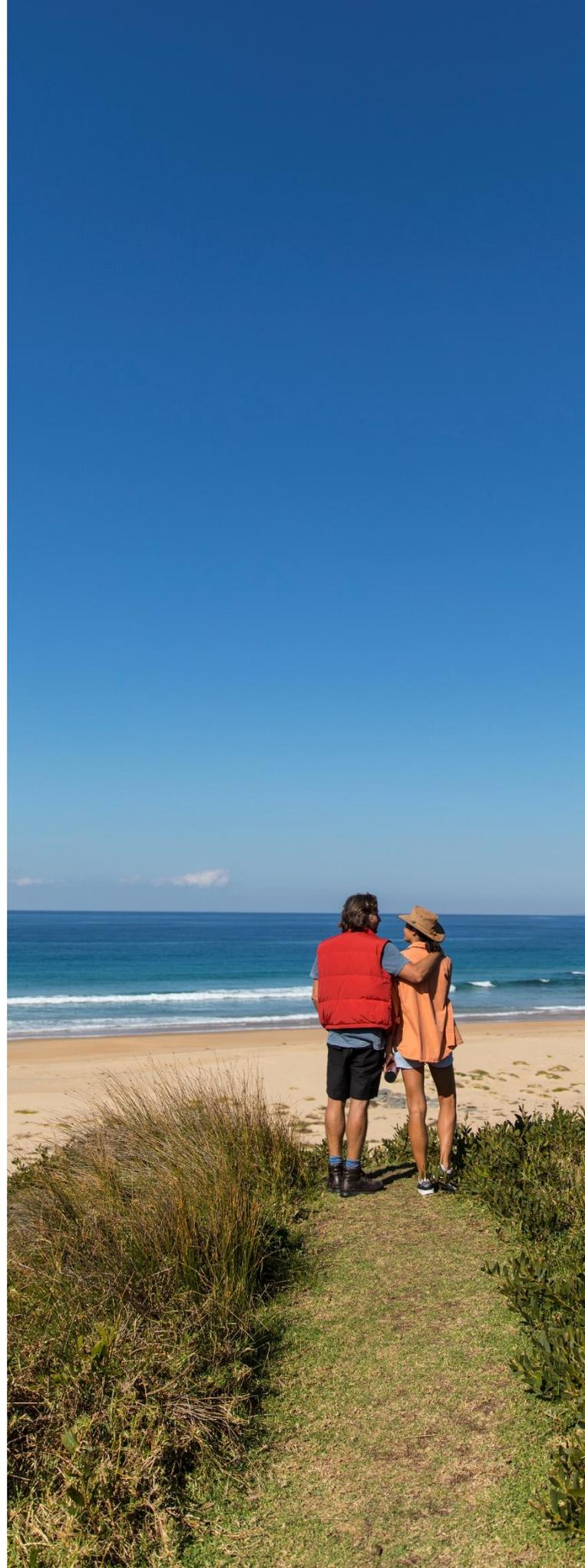
Summarises the potential benefits of the Great South Coast Walk

SECTION 7 - Recommendations

Presents the actions required for Great South Coast Walk to become an outstanding walking experience

SECTION 8 – Conclusion

Presents a summary and conclusion of the study.



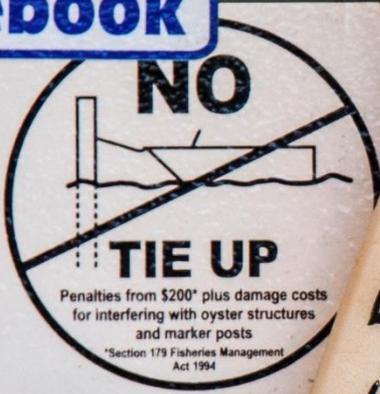


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Wild Ryes Bakery

Boyds Tower and whaling Station

Blue Pools Bermagui

Tathra-Bermagui Coastal drive

2. The Market Analysis

This section examines the market trends influencing product and experience development for walking visitors to the South Coast region.

Tourism to the South Coast Region

The South Coast is regional NSW's third most visited region for domestic and international overnight visitors due in part to its proximity from the three major cities of Sydney, Melbourne and Canberra. Tourism is an increasingly important sector with \$1.8 billion spent by visitors in the region in 2018. There has been strong growth in from both domestic and international visitors over the last ten years and in 2018 the region received 4.3 million visitors⁶ made up of 4.1 domestic overnight visitors and 194,000 international visitors (refer Figure 2).

The region's natural assets are a significant drawcard for visitors with over half of NSW's 91 coastal lakes and lagoons, 400 significant wetlands, 60 sensitive estuaries, three large bays; Jervis Bay, Batemans Bay and Twofold Bay, and two Marine Parks located in the region. Around 44% of land in the region is protected as a national park or other conservation area.

Wollongong, Shellharbour, Kiama, Nowra, Ulladulla, Batemans Bay, Bermagui, Tathra, Merimbula and Eden that act as hubs for a range of marine and nature-based activities for visitors.

The region offers a diverse range of accommodation that supports visitors to the region including hotel/resort/motel accommodation, guest houses/bed & breakfast accommodation, rented house/ apartment accommodation, caravan parks, commercial camping grounds, backpacker

accommodation and remote area camping and cabins within some national parks. The many restaurants, cafes, wineries, breweries, galleries and markets in the coastal towns and villages offer visitors the opportunity to experience fresh regional produce and the local art and crafts.

There are over 80 tour and transport operators in the region that fit within the nature-based, adventure or guided walk experience category or transport (shuttle service) category. Tours range from day experiences, luxury, youth, budget to multi-day experiences.

Visitor Profile

Domestic day visitors dominate tourism to the region (60% of all visitors), especially in the northern parts of the region i.e. Kiama, Wollongong and Shellharbour (making up 75% of all visitors). Domestic overnight visitors represent 38% of all visitors and international overnight visitors represent just 2% of all visitors.

By comparison, domestic overnight visitors are more prominent than domestic day-trippers and international overnight visitors in the most southern parts of the region, accounting for 52% of all domestic visitors in the Shoalhaven, Eurobodalla and Bega Valley areas.

Sydney is the largest source market for visitors to the region (47%), followed by regional NSW (28%) and ACT (12%). Visitors from interstate accounted for 25% of the region's visitors. The Canberra region and Victorian market are more important as source markets for the region's far south, particularly in Eurobodalla and Bega. Over one third of visitors stay with friends and relatives while visiting the South Coast.

⁶ IVS and NVS, Tourism Research Australia, March 2019

Figure 3. A snapshot of tourism to the South Coast Region⁷



⁷ IVS and NVS, Tourism Research Australia, March 2019

National Park Visitation

In 2018, visitation to the South Coast region's national parks was estimated 6.4 million visits. This is an increase of 11.5 % on the previous year and 29% growth since 2008.

Royal National Park is NSW's most visited national park. The most popular parks on the South Coast Region are Jervis Bay, Morton, Ben Boyd and Eurobodalla National Parks. Except for Morton, the top four parks in the region are part of the proposed Great South Coast Walk.

As a general trend, visitation to parks in the South Coast tends to peak December-January during the summer holidays and decline to low levels of visitation in mid-October-mid-November and then increase to the peak in summer.

The International Walking Market

According to the World Travel and Tourism Council (WTTTC), the global travel and tourism sector grew by 3.9% last year, which, for the eighth consecutive year was above the growth rate of world GDP. The WTTTC identifies walking and outdoor adventure as one of the high value tourism sectors showing strong growth. Walking is a part of the global 'adventure travel' trend which the United Nations World Tourism Organisation (UNWTO) estimates has doubled in size in the past five years. Adventure tourism, in particular 'soft adventure' tourism such as walking, is not only a growth sector but a major contributor to well-being; the sharing of economic benefits to more remote areas; and building awareness of the environment and the importance of environmental protection.

The global walking market includes a wide-variety of users seeking an even greater diversity of walking experiences from short walks to multi-day adventures, referred to as 'extended' walks. Based on the UNWTO estimates of the walking market

globally, Australia captures less than 1% of the global trade in extended walks (multi-day), whereas our neighbours in New Zealand have nearly twice that share. This includes a growing trend towards 'destination' walks where a single location becomes the primary reason for travel to a country (e.g. The Camino Way).

Guided and self-guided accommodated walks are one of the fastest growing tourism products in Australia and other international destinations. This high value growth market is being targeted by other Australian jurisdictions and international destinations.

Market research into this growing segment shows it includes visitors whose main interests include physical activity in a natural environment without foregoing the creature comforts of home and having authentic experiences. It is estimated that around 3% of all walks are now extended or multi-night walks with over 50 promoted overnight walks in Australia.

Tourism Australia's Experience Themes for the international markets are:

1. Coastal/Coastal and Aquatic experiences
2. Consumer events
3. Food and Wine
4. Nature.

Internationally the South Coast Region offers products that deliver to all the four experience themes. It is perfectly positioned to leverage Tourism Australia's Coast and Aquatic and Nature based campaign activity.

There is also potential to tap into the Tourism Australia's Signature Experiences Program. This program currently promotes wineries, luxury lodges, golf courses, guided walks, Aboriginal guided experiences, fishing adventures, wildlife encounters and cultural attractions. The Great Walks of Australia (GWOA) program is a marketing collective established by commercial businesses offering high quality trail experiences across Australia. Whilst commercially funded, it is promoted as part of Tourism Australia's Signature Experiences 'Best of Australia' brand tailored for high value discerning international travellers seeking unique, exclusive and connecting experiences.

Great Walks of Australia focuses on fully supported walking experiences that meet clear criteria associated with the walk/experience standard and attraction, the accommodation, hospitality and other services.

There are currently 12 Great Walks of Australia with only one of these located in NSW, the Seven Peaks walk, Lord Howe Island.

The Walking Market in Australia & NSW

The following analysis of 'walking tourism' in Australia is principally drawn from data in the National and International Visitor Surveys where respondents were asked to list the 'activities' they participated in when visiting the destination. These insights have then been matched against industry and academic research to provide a snapshot on the potential walking market for the South Coast region.

In 2018, 41.5 million visitors in Australia undertook bush walking during their travel; comprised of 4.1 million internationals (10%), 18.4 million domestic overnight visitors (44%) and 19

million domestic day visitors (46%). NSW received 14 million of these visitors comprised of 2.4 million international (17%), 6.3 million domestic overnight (45%) and 5.3 million domestic day visitors (38%).⁸

Overall, NSW is the strongest market in Australia for walking visitors, representing 34% of the country's walking visitor market.

The general trend for walking visitors to Australia and NSW has been positive with a year on year growth. The walking market to Australia increased by 12% from 2017 to 2018, with the biggest increase in domestic day visitors, up 18% across the year. The NSW walking visitor market increased by 8% from 2017 to 2018 and showed strong five-year growth, up 41% since 2014.

Walking in National Parks

Analysis of walking activities in national parks across the state also shows significantly growth.⁹ Of the top four activities, walking increased in 2018 to their highest level recorded (64% compared to 54% in 2008) and has had the strongest growth when compared to other activities. Overall, just over one third of visitors undertaking walking activities walked for less than an hour (35%), while more than half walked for up to half a day (approximately 4 hours – 56%). Only 4% walked for up to one day (approximately 8 hours), while just 2% went on a multi-day walk.

The South Coast Walking Market

The South Coast of NSW received 1.8 million overnight walking visitors in 2018 which represents 13% of the NSW total walking visitor market, and 4% of Australia's walking market.

The South Coast was the fourth most frequented destination for walking visitors in NSW in 2018 after Sydney, the North Coast and the Blue

⁸ IVS and NVS, Tourism Research Australia, 2018.

⁹ NSW NPWS, Market Analysis 2019

Mountains. Most walking visitors to the South Coast region were domestic overnight visitors (60%), followed by day trippers (32%) and international overnight visitors (8%). The walking market to the South Coast has increased by 23% over the last 4 years.

Profile of Walking Visitors

The largest percentage of walking visitors to NSW (both domestic and international) is aged 25-34 (25%), followed by 35-44 years (17%) and 45-54 years (16%). This is similar to the demographics of South Coast walking visitors with the majority aged 25-34 (21%), followed by 45-54 years (18%) and 35-44 years (17%). Combined, walkers aged over 35 make up most walkers to the South Coast Region.

Walking visitors to NSW are evenly split by gender with males representing 51% of the market. Walking visitors to NSW are predominantly couples (29%), followed closely by those travelling with friends and relatives (27%), then solo travellers (23%) and families (21%).

The largest share of international walking visitors to NSW travel from China (18%), followed by the United States (11%) and the United Kingdom (10%). This follows the pattern of international walking visitors to Australia, with the country overall receiving most walking tourists from China (16%), the United Kingdom (10%) and the United States (9%). The high percentage of Chinese visitors who participate in walking while on holiday in Australia are most likely to undertake very short walks of less than 1 hour as part of a group tour.

Purpose

Most walking visitors to NSW indicate the primary purpose of their trip is 'holiday' (72%). The other main reason for travel is visiting friends and relatives (VFR), accounting for 19% of all walking visitors to the South Coast region, 23% of those to NSW, and 21% to Australia.

The South Coast region receives an even higher percentage of walking visitors on holiday (76%) when compared to NSW (72%).

Average Length of Stay

The average length of stay (ALOS) of domestic overnight walking visitors to both NSW and the South Coast region is 4 nights. For international walking visitors, the ALOS is much higher at 24 nights for NSW and 13 nights for the South Coast region. Compared to Australia overall, NSW receives a slightly lower ALOS for domestic overnight walking visitors than Queensland, Western Australia, Tasmania and the Northern Territory (all with ALOS of 6 nights) and the second highest ALOS for international visitors, after Western Australia (with ALOS of 29 nights).

The needs of domestic and international walkers

An analysis of the research and through discussions with local walking and tourism businesses it is possible to build a clearer picture of what the current walking market to the South Coast is seeking. There is broad appeal for day walks, adventure walks and supported walks with guided and accommodated walking options for both domestic and international visitors. The characteristics of different type of walkers, based on research and industry feedback, are defined in Table 1. In summary most walking visitors are looking for iconic, soft adventure walks with guided and self-guided products and packages providing accommodation and linked experiences. This demand for these types of experiences align with Tourism Australia's strategy for infrastructure investment that supports coastal and nature experiences, wildlife interactions as well as food and wine experiences.

Table 1. Walker Profiles – Residents, Domestic and International Visitors

Market	Description	Experience Needs and Preferences
Residents		
Walkers and Hikers	<p>Wide range of users and ability levels including people using trails for exercise, commuting, relaxation and leisure activities.</p> <p>Some groups using rail trails and local paths, some seeking nature and adventure experiences in the regions National Park and reserves</p>	<ul style="list-style-type: none"> • Safe short trails for daily use • A range of all-ability access trails • Short to long trails for weekend leisure activities both close to population centres and within easy weekend travel from home. Appealing destinations. Linked or nearby activities, attractions and accommodation • Short to long hiking trails in a variety of locations (from near-urban to remote) at a range of difficulties • Links from accommodation hubs to areas of interest • Accessible trailheads with adequate parking and facilities. Overnight or multi-day trails with provision for on-trail camping or hut accommodation or nearby off-trail accommodation • Regional residents often seek areas away from the busy tourism hot spots in peak periods to continue to enjoy their local area highlights.
Domestic Visitors		
Soft Adventure	<p>Families, adult couples and retired people seeking trail activities of one or more day's induration.</p> <p>Some may visit the region specifically to undertake a trail.</p> <p>This will generally occur on trails that are more widely used and offer a 'safer' entry into trail use</p>	<ul style="list-style-type: none"> • Hiking and cycle trails packaged for journeys of one or more days • Guided or self-guided tours or packages, accommodation, linked activities • Mountain bike parks with variety and/or iconic rides • Transport, accessible trailhead, equipment and bike hire • Good pre-trip information and booking • Engaging, immersive interpretation • Generally good facilities nearby for food and beverage after completing the trail adventure.
Hikers	<p>Self-sufficient hikers, walking clubs, youth and other social groups in a variety of ages engaging in short and long experiences.</p> <p>May visit the region specifically to walk a trail.</p>	<ul style="list-style-type: none"> • Short to long hiking tracks at a range of difficulty levels showcasing landscapes or offering a special challenge • Accessible trailheads with adequate parking and facilities. Overnight or multi-day trails with provision for camping or even staying at cattleman huts or nearby off-trail accommodation • Transport and shuttles, especially for one-directional trails • Accessible track information.
International Visitors		
Walking Tourists	<p>Mainly visitors from USA, UK NZ ranging in age from young adult to over 55, travelling with a partner or alone.</p>	<ul style="list-style-type: none"> • Iconic, soft adventure walks with guided and self-guided products and packages providing accommodation and linked experiences • A range of other walking and hiking opportunities and nature-based and outdoor pursuits • Adventure activities and packages • Transport, equipment hire • Good pre-trip information and booking • Engaging, immersive interpretation and signs to assist with the feeling of safety and accessibility.

Walking Tracks on the South Coast

To meet the growing demand for walking visitors, the South Coast region has over sixty high quality coastal walks managed by local, state and commonwealth governments. These walks vary from short walks (less than one hour), day walks and multi day walks. These walks are managed and promoted by each agency. A summary of the coastal walks available in the South Coast Region is presented in Appendix B.

Some of the walks within the region are currently developed to the extent that they are well known and popular such as the Royal Coast Walk in Royal National Park, Grand Pacific Walk (Illawarra) and the Light to Light walk in Ben Boyd National Park.

Significant investment in recent years has included the ongoing works on the Royal Coast Track, construction of the Grand Pacific Walk, the Kiama Coastal Track and new walks or connecting trails in Shellharbour, Shoalhaven, Eurobodalla and Bega. These improvements have resulted in significant enhancement of infrastructure to support walking visitors to the region.

Proposed Investment in Walking Tracks

The importance of walking tourism as a significant growth market and a way of leveraging further tourism growth to NSW and the South Coast region is recognised in several strategic planning and economic development strategies for both NSW and the South Coast Region. Various planning documents including the NSW State-wide and Sydney and Surrounds and South Coast Destination Management Plans and economic development strategies have identified the need for ongoing investment in the development and promotion of trails for recreation, tourism and economic development. A summary of the relevant strategic planning documents that reference the importance of trail development on the South Coast is provided

in Appendix C. In particular, the New South Wales South Coast Marine Tourism Strategy¹⁰ prioritises the development, enhancement and promotion of a network of coastal walks and trails in National Parks along the South Coast.

As a result of this strategic intent, further significant investment in walking track infrastructure is proposed by the NSW State Government and the region's local governments in the next few years.

NSW National Parks and Wildlife Service

NSW National Parks and Wildlife is investing significantly in its walking track infrastructure across its network of parks and reserves on the South Coast. Funded by the NSW Regional Growth – Environment and Tourism Fund the investment will support regional economic growth, create local employment opportunities, and drive growth in the visitor economy.

Investment is proposed for Royal Coast Track, Murramarang Coastal Walk and the Light to Light Walk as follows

- Upgrades to the Royal Coast Track commenced in 2016-17 and almost 17km of track has been upgraded and 9km remaining. Works have been staged and will be completed by June 2022. The Royal Coast Track Implementation Framework recommended activation of accommodation on the track.
- The Murramarang South Coast Walk which links the five major localities of Batemans Bay, Durras, Peppy Beach, Kioloa and Bawley Point, will undergo a \$3.64 million upgrade to fund the construction of new track sections linking existing trails. The walk can be completed over 4 easy days that can be undertaken as self-guided or via commercial tour operators offering various levels of assistance and experiences to individuals or groups. Accommodation is available on the walk (camping/cabins) or in local towns. The walk is also suited to be undertaken as separate day

¹⁰ NSW Government 2019

walks and includes a new trail head and facilities at Maloney's beach near Batemans Bay.

- \$8 million on the 39-kilometre Light to Light coastal walk in Ben Boyd National Park south of Eden. The remote four-day coastal walk that links the historic Boyd's Tower to Green Cape Lighthouse and on to the Wonboyn estuary at Disaster Bay will be upgraded and extended. Eco-accommodation will be built along the route, making it the first purpose-built hut-to-hut walk in a NSW national park.

Local Government

The coastal walks provided by each of the six Councils in the region are high quality and take in many of the scenic and cultural values of the South Coast. Recognising the significant social and tourism benefits the walking tracks bring to the community, the tourism and economic development plans for each Council identify the need to invest in walking tracks with priorities relating to connecting trails, trail heads and in some instances, new coastal walks (refer Appendix B).

Most notably Wollongong City Council is intending to invest in its Grand Pacific Walk completing the missing links south from Clifton towards Austinmer and Stanwell Park to Bald Hill. This will complete a formed footpath from Stanwell Park to Austinmer. \$11 million is being expended to achieve the vision set out in the Master Plan.

Shellharbour Council is proposing a new walking track around the new marina development and Kiama Council is intending to extend the existing Coastal Walk from Gerringong to Gerroa and complete the Minnamurra Boardwalk subject to funding. Shoalhaven Council is focussed on extending its network with plans for a coastal headland walk linking Ulladulla and Warden Headlands.

Eurobodalla Council is concentrating on the Maloney's Beach trailhead where the Murramarang Coastal Walk commences/finishes. Funding is also sought for a Coastal Headlands Walking Trail linking Batemans Bay to Mackenzie's Beach. Further south, Bega Council is concentrating on local networks as well as supporting the ongoing improvements to tracks that link to the Bundian Way.

A summary of proposed investment in coastal walking track infrastructure on the South Coast is presented in Appendix D.

Local, Regional and National Walks

For planning purposes walking trails can be categorised as local, regional or national trails. The difference between national, regional/state and local trails can be defined as follows:

Local

- A trail commonly designed by Local Governments to encourage healthy community lifestyles and support alternative commuting around townships such as bike and walking trails.

Regional or State

- These may be a network of trails that form short walks for local people and visitors alike in regional areas. Some may also be lesser known multi-day experiences. Mostly used by intrastate or domestic visitors, these trails traverse through natural locations often in national parks or state forest reserves.

National

- This type of trail experience is nationally or even internationally renowned. Visitors undertake these experiences as a must-do when visiting a destination as it includes iconic scenery and or historic / cultural features.

In Australia and internationally, significant numbers of visitors travel to specific locations for the sole reason of undertaking an iconic or nationally significant (usually multi-day) walk. Destinations have been developing their walking track infrastructure in response to this demand and promoting these experiences to domestic and international markets.

For example, in New Zealand there are the Queen Charlotte, Milford and Routeburn tracks; Scotland has the West Highland Way; UK has the South West Coast Path and the Coast to Coast walk; Spain has the Camino; Italy, the Cinque Terra trails. In Australia, Western Australia has the Cape to Cape and the Bibbulmun track; Victoria has the Great Ocean Road walk; Tasmania has the Overland, Bay of Fires, Three Capes and Freycinet walks; South Australia has the Heysen Trail; Queensland has the Great Walk series and the Northern Territory has the Larapinta and Jatbula Trails. Appendix E presents case studies of national and internationally significant walks and their benefits.

Most trails in the South Coast region can be categorised as local trails and regional/state trails. When compared to other jurisdictions in Australia, except for the Seven Peaks walk on Lord Howe Island, NSW is the only state without a multi day walk that is considered iconic or nationally significant to attract international and interstate visitors.

Tourism Growth Forecasts for NSW and the South Coast

Between 2018–19 and 2028–29 the 10-year average annual growth in visitor nights in NSW is forecast at 3.3%. Domestic visitor nights in NSW will have an average annual growth rate of 1.1% and international visitor nights in NSW will have an annual growth rate of 5.3%.

Tourism to the South Coast Region is expected to grow to 14 million visitors by 2030, a 2.7% average increase per year. Day visits and peak season visitation will continue to be areas for growth.

Summary

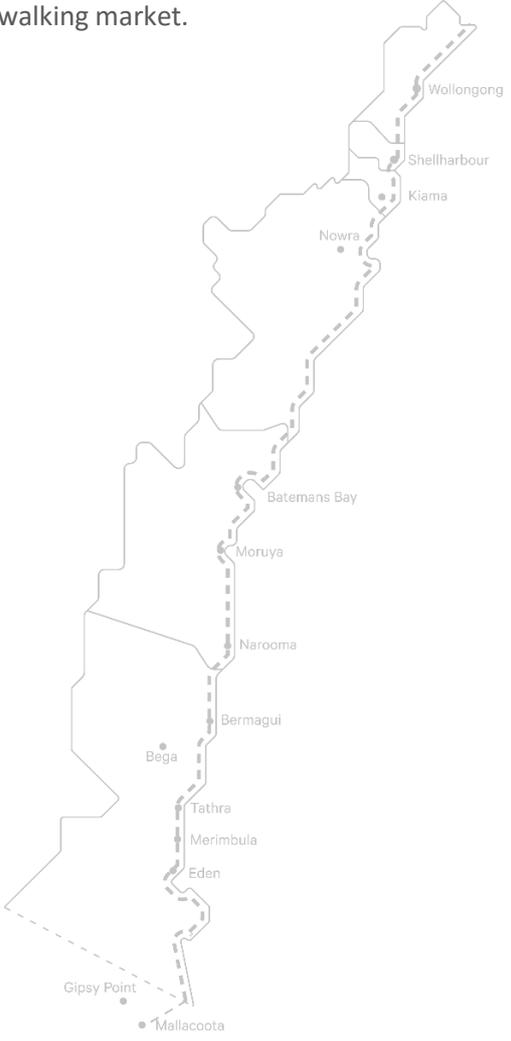
The demand analysis suggests that there is an opportunity for the South Coast to grow its share of the Australian overnight walking market and position itself as Australia's premier coastal walking destination. It has a well-established walking market and well-developed infrastructure to support growth. In doing so, the South Coast will assist NSW in growing its national share of the walking market. The effort of federal, state and local government in the development of walking track infrastructure presents a significant opportunity for tourism to the region.

Working independently, and in many cases competing for the same funds to achieve their objectives, there is a risk that this opportunity could be lost with other destinations competing for this market in a more sophisticated way, recognising the value created by coordinating investment and marketing activity. It is understood that the existing trails are already providing economic benefits to the region, but these benefits have not been quantified

There is little co-ordination across the agencies and with local tourism organisations on development, maintenance and promotion of the trails and the lack of a strategic and co-ordinated approach to developing walking tourism is preventing the region from realising its potential to become NSW's premier walking destination and generating greater economic and employment benefits for the region and state.

To capitalise on the market growth and existing walking trail investment the South Coast Region needs

- a ‘signature’ walking experience that includes a range of product options from short walks (under 1 hour) and day-walks (up to 8 hours), and multi-day or ‘extended’ walks
- Co-ordinated investment in walking tracks and services that support the signature experience
- Strong positioning and co-ordinated marketing to position the south coast as Australia’s premier walking destination. This could include a package of walks (i.e. Great South Coast Walk Concept) as well as a package of short walks (e.g. Great South Coast Short Walks) to leverage the significant investment and popularity of walking in the region. This will have a much stronger pulling power and provide cut through in the competitive market walking market.





3. Characteristics of Exceptional Walking Experiences

This section examines the characteristics of exceptional Australian and international walking experiences.

Overview

A signature walking experience is more than the physical trail. A combination of factors attracts visitors including environment and setting, the quality and quantity of trails, their accessibility and the interest and challenge offered.

A critical component of a successful trail is also the capacity to service the needs of the trail tourist through an adequate supply of services. Trail users today have higher expectations about their trail experience and are anticipating ease of planning and fact finding, access, high quality regularly maintained infrastructure, facilities and services and complementary packaged options including accommodation, food and beverage and other value-add activities. It is important that the user experience is central to each element of trail design and management.

Main characteristics

An analysis of the case studies in Appendix E suggests that most successful national or internationally renowned signature walks have several common elements. Although the detail may differ for different types of user, the basic elements are consistent for day, multi day and long distance walks all over the world. The following factors have been identified as contributing to their success:

- A clear point of difference for the trail experience that is well communicated through marketing
- Existing high market profile for the destination in which they are located
- Complimentary nature-based attractions and infrastructure in the region
- Ability to cater for both independent and guided walkers
- An experience that offers exclusivity and avoids high volumes of walkers/visitors
- A quality seamless experience with ease of information, booking and accommodation
- Walking distances that are geared to consumer preferences
- Effective governance, coordination and management
- Community and industry engagement and support.

These characteristics will vary as to whether they are considered essential or optional depending on whether the walk is international, regional/state or local trail and as presented in Table 2.

Table 2. Characteristics of international, domestic, intrastate and local trails

Essential components √ Optional components ○ Not essential component X

Consumer expectations	International/ National Trails	State Trails	Local trails	Trail planning considerations	Trail infrastructure elements
Spectacular settings and encounters with wildlife	√	√	○	Identify unique settings and wildlife encounters	Present experiences that are world class and connect visitors with unique Australian experiences
Showcase Australian unique nature, culture and landscape	√	√	○	Connect with nature, culture and landscape and maximise the trail's wow factor	Provide exciting view and observation opportunities whilst protecting landscape, environmental and cultural values through risk assessment and innovative trail design using positive trail control points
Nature based adventure experience	√	√	○	Integrate excitement, fun and a sense of wildness into the trail experience	Retain strong connection with nature and enjoyable and challenging experiences on all trails and ensure user comfort and safety corresponding to trail grade
Step on and step off opportunity	√	○	○	Provide opportunity to leave and connect with long distance trail at sites that enhance experience	Link stepping off opportunity with towns, accommodation, transport, trail hubs and visitor experiences including side trips
Information - web site access	√	○	○	Provide high quality information on trails via web sites	Web site information to include trail maps, trail history, features, amenities, facilities at various sites, safety and etiquette tips which should include incident warning information (e.g. bushfires)
Maps, guides and on site information	√	○	X	Key information for trail users on site and through web sites	Web sites, access through phones and through a range of on-site information at trail heads, trails section signs and at sites. Level of information should correspond to trail grade
Accessibility through tourism providers	√	○	○	Cater for variety of trail user types and promotion of tourism opportunity	Trail head and step on and off points are planned to link in with tourism operators, accommodations, visitor sites and public transport
Public transport and vehicle parking	√	√	○	To promote equity, healthy communities and connecting to	Consider transport links, suitable parking and consideration of residents' views

Consumer expectations	International/ National Trails	State Trails	Local trails	Trail planning considerations	Trail infrastructure elements
				nature ensure access to public transport	
Proximity of local and regional trails for local users	x	x	√	Ensure ease of access and ensure user considerations to maximize use	Trail head placement at appropriate stepping on and off point for local users with consideration for current and future parking and access requirements and impacts on neighbors.
Accommodation and associated products and services	√	√	x	Link range to trail users needs and accessibility	A range of accommodation linked to users requirements, on and off trail and linked to existing and future transport and business opportunities
Sustainable and low environmental and cultural impact	√	√	√	Protecting trail and community values while encouraging travel through the landscape	Sustainable trail principles through proper design, use of control points, good construction linked to ongoing maintenance. Ensure enjoyable and challenging experiences on all trails linked to trail grades
Trail based events	o	o	o	Encourage and enable sustainable event opportunities that promote trails values	Events should reflect trail objectives and trail infrastructure should be planned for future use, trend changes and consideration of land management legislations and policy
Short walk component	o	o	√	Options for short walk components of significant trails	Plan to enable short walks to be taken on day or multi day walks, consider access points and opportunity to include people with disabilities including wheelchairs linked to trail grades
Day walks	o	o	o	Important component of trail mix providing enjoyable and challenging experiences	Design to accommodate variety of users and develop trail according to agreed trail grade and clearly informing users of trail class and expectations
Multi Day walks	√	o	X	Can be the most challenging and rewarding with opportunity to engage with wild areas and landscapes	Critical planning and design ensures challenge, reward and connection with landscape, strong focus on appropriate trail grades, consideration of accommodation types and strong links to partnerships and industry providers

Other considerations

Strong positioning and marketing

Strong marketing is required to ensure a long distance or national trail cuts through in what is becoming a more and more crowded marketplace. Each destination must ensure it positions itself well and aligns its core strengths and experiences to the market and promotes it accordingly.

Consistent application of a brand across the destination and the partners involved is also critical to avoid mixed signals and inconsistent messaging. Strong planning and collaboration between partners, land managers, businesses and the tourism industry more generally are essential to getting the marketing and positioning delivered well. A coordinated effort toward branding and positioning a collective of trails will create much greater market recognition, than each individual agency marketing their own trails. This is the approach adopted by many destinations as outlined in the case studies presented in Appendix E and the Ride High example presented in this section.

Quality pre-trip information and one stop shop for booking services

Visitors more and more are researching their trip based on on-line content. Quality pre-trip information, including maps for trails is required to provide prospective visitors with the information they need to decide on the trail destination they will visit.

Providing trail users with the information on the range of services available to support and enjoy their trail experience and providing options to book online are critical. The most common platform is a website that assists in providing a seamless experience where the logistics of accessing trails, transporting people and equipment, and finding a place to stay are easily handled. Examples include <https://www.scotlandsgreattrails.com/>,

It is becoming more prevalent for trail destinations to run walker or bike friendly schemes where service and accommodation providers offer products and packages that cater for needs such as secure equipment storage, clothes and equipment washing, packed lunches, opening hours convenient to trail users. Many of the European walks fit this category.



Ride High Country Preferred Program

Cycle tourism is key to Tourism North East's organisation efforts, with the High Country recognised as having the strongest regional cycling credentials in Australia. The offering is united under a regional master brand - Ride High Country - which leads efforts to ensure the High Country remains the lead bike destination in Victoria.

Tourism North East's Ride High Country campaign inspires riders to travel to the High Country by providing detailed information for seamless trip planning. This includes suggested cycling routes, comprehensive trail mapping, cycle friendly accommodation options, transport providers, bike hire and cycle touring companies. This ensures that cycle trip planning is catered for by one easy to use portal.

The Ride High Country 2018/19 - 2021-22 Marketing Strategy has been developed to assist the region in meeting its category ownership aspirations, outlining a vision for the development and promotion of the Ride High Country offering. The Ride High Country masterbrand was developed to unite the 12 cycling destinations of the North East, to leverage and grow its cycle tourism strengths. Utilising a range of promotional tactics, Ride High Country is positioned as 'Australia's premier cycling destination'.

Their Ride High Country Preferred Program (RHCP) is a strategic initiative aimed at businesses to provide exceptional service to cycle visitors to the region. Businesses benefit from an extensive campaign across an array of marketing channels including: digital advertising, billboard advertising, video and social media content, stories in leading cycle publications (both print and online), attendance at events like 'Around the Bay in a Day' and media family visits to the region by leading cycling journalists.

RHCP businesses embrace the partnership by displaying a Ride High Country image tile on their website, share #ridehighcountry on social media and work with TNE on media activities when required. To become a Ride High Country Preferred Business, businesses must:

- Be listed with the Australian Tourism Data Warehouse (ATDW)
- Provide complimentary water – cyclists must be able to refill their water bottles free of charge
- Display local cycle information – maps, guides, brochures
- Have staff who are knowledgeable regarding the local cycle offering – where to ride, location of bike stores
- Businesses must also provide three services from an extensive list such as bike rental, services, storage etc

Source: visit www.ridehighcountry.com.au

Effective governance, coordination and management

Good governance provides for well made decisions based on evidence and made in a collaborative way aligned to a strong sense of vision and long-term planning of the trail. An effective governance structure and mechanism is important for each destination, and it is important that the governance model is fit for purpose for that area. Elements of a good governance model include:

- The partners and operators have a clear sense of a vision for the destination
- The partners have a clear understanding of their roles and accountabilities and work together in that framework
- Having teams with the right skills and experience to drive outcomes
- Having access to the necessary financial, human and support resources they need to develop the destination.

Many trail destinations in Australia struggle to gain the necessary funding for ongoing maintenance. This is in part due to many trails being on land run by government agencies whose business models generally do not have fee for services where the fees directly hypothecate back into a destination's maintenance.

New models are being developed across Australia to help deliver strong financial security for trail developments.

Queenstown Trails Trust

is an organisation with a purpose to raise funds for the development and growth of the trails network in Queenstown NZ (www.queenstowntrail.co.nz). It has a Board of Trustees that includes independent businesspeople and land managers. They have been very successful in helping to deliver and grow over 120 kms of trails on mixed land tenures around Queenstown and the Wakatipu.

Great Alpine Road Marketing Inc.

was established as an incorporated body representing a series of shires, Regional Tourism Organisations and other operators along the 400km of the Great Alpine Road in Victoria. The group coordinated the further development and promotion of this significant touring route during its formative years including establishing consistent infrastructure and signage on a range of land tenures. Funding came from contributions from partners as well as grants that were committed to implementing the development and marketing strategies for the benefit of all parties. Without incorporation, funds would need to have been managed within member agencies.

Community and industry engagement and support

Strong community engagement with local communities about plans, issues and opportunities helps ensure that the destination's experiences are delivered by managers, businesses and community alike. It also helps ensure that local needs are considered in the trail management and development.

The Appalachian Trail Community™

The Appalachian Trail Community™ program is designed to recognize communities that promote and protect the Appalachian Trail (A.T.). Towns, counties, and communities along the A.T.'s corridor are considered assets by all that use the A.T., and many of these towns act as good friends and neighbours to the Trail. The program serves to assist communities with sustainable economic development through tourism and outdoor recreation while preserving and protecting the A.T. Designation as an A.T. Community™ and participation in the program is aimed to:

- Engage community citizens, Trail visitors and stewards
- Recognize and thank communities for their service to the Trail and hiker
- Act as a catalyst for enhancing sustainable economic development
- Aid local municipalities and regional areas with conservation planning Help local community members see the Trail as a resource and asset



APPALACHIAN TRAIL COMMUNITY™

There are over 40 communities along the Appalachian Trail's corridor that have been recognized in The Appalachian Trail Community™ program. These towns and cities are considered assets by all that use the A.T., and many of these towns act as good friends and neighbors to the Trail.

As a visitor on the Trail, you can enjoy special events and promotions in these designated areas. When planning your hike, look to designated A.T. Communities for services such as shuttles, lodging, resupply and a warm welcome!

[LEARN ABOUT A.T. COMMUNITIES](#)

Marketing and Promotion

Destinations often seek to cluster their trail experiences to promote to attract a range of markets. Some governments have sought to cluster what they believe to be their best walks and have branded them 'Great Walks' so they can better promote them to visitors to a destination.

- New Zealand has developed and promoted its Great Walks over many years, and these have become highly successful in attracting both domestic and international visitors. In the last year the government has implemented differential pricing for domestic and international walkers on Great Walks to encourage more New Zealanders to walk in their own country. A rigorous process has been applied in the last 18 months to add one additional Great Walk to the suite of Great Walks.
- Queensland invested significant funding several years ago with the intention of developing and promoting a suite of Great Walks. The planning at the time did not result in the outcome desired - likely due to an internal government approach where officers with limited understanding of target markets and their needs delivered the tracks. Work is currently underway to improve the experience of these 'Great Walks' to better meet market needs.
- Whilst Tasmania does not formally use the term Great Walks, it has three great walks that are commonly recognised as some of the best in Australia. The strength of the experience offered on the Overland Track, Bay of Fires and Three Capes have been enough for them to be recognised as Great Walks by consumers.

- Tasmania has for many years had a cluster of 60 Great Short Walks and this program and its promotion provides a strong guide for visitors seeking walking experiences across Tasmania.
- North East Victoria's 'Ride High' master brand unites cycle tourism offerings across 12 regions in North East Victoria (see Case Study 1).
- Scotland's Great Trails (SGT) has been developed as an elite branding for the best quality long distance routes in Scotland. SGT branding offers route users reassurance as to what they can expect and offers route managers opportunities to raise the profile of their routes through targeted national marketing campaigns. The standards set by SGT also provide a useful yardstick for route developers.
<https://www.scotlandsgreattrails.com/>

There is significant opportunity for the South Coast Region to consider a collection of walks that can be marketed together to provide greater recognition in the marketplace and position the region as Australia's premier destination for coastal walking.



Great Walks of Australia

Launched in 2012, the **Great Walks of Australia (GWOA)** program is a marketing collective established by commercial businesses offering high quality trail experiences across Australia. Whilst commercially funded, it is promoted as part of Tourism Australia's Signature Experiences 'Best of Australia' brand tailored for high value discerning international travellers seeking unique, exclusive and connecting experiences.

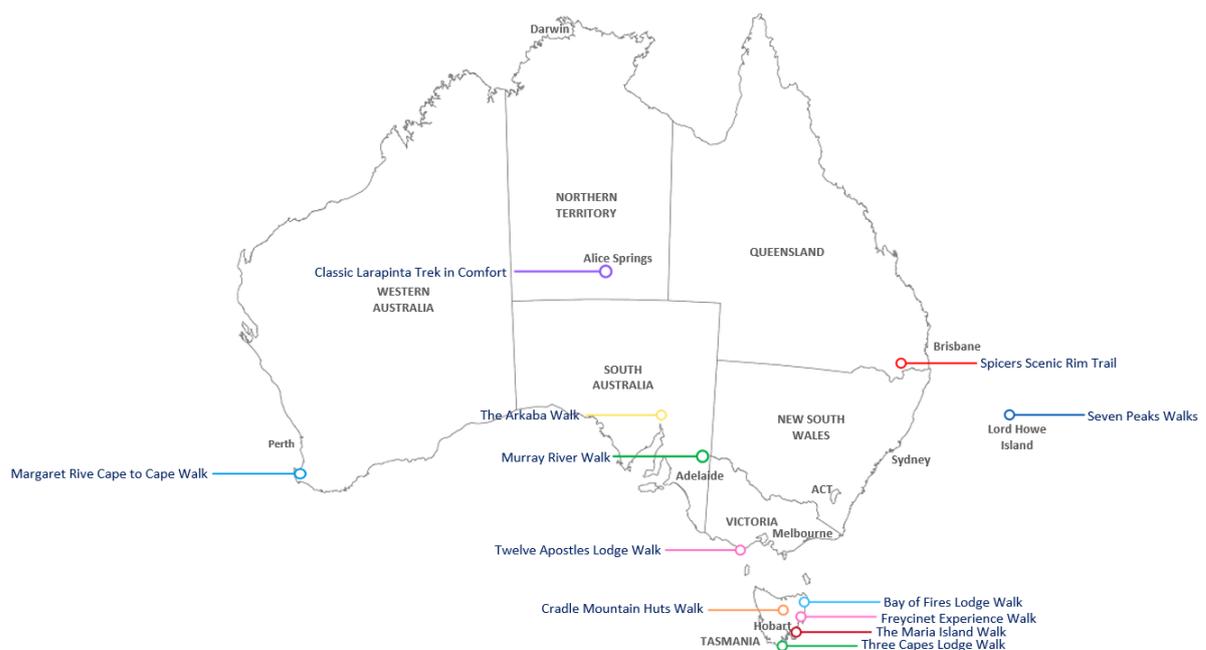
Great Walks of Australia focuses on fully supported walking experiences that meet clear criteria associated with the walk/experience standard and attraction, the accommodation, hospitality etc.

There are currently 12 Great Walks of Australia with only one of these located in NSW, the Seven Peaks walk, Lord Howe Island.

Commonalities of the existing Great Walks of Australia experiences include:

- Exclusive luxury accommodation
- Small and intimate tour groups
- Experienced guides
- Full food and wine experiences
- High yield with an average cost of \$500-\$600 per day

Discussions with the GWOA organisation reveals that they are actively seeking new experiences to add to the program but that the criteria for membership will not be compromised. Becoming a Great Walk of Australia is not something a land manager or tourism organisation can achieve. It is an opportunity for a commercial operator that can deliver an integrated experience on a walk that can meet the criteria established for membership.





4. Assessment of the Great South Coast Walk Concept

This section assesses the Great South Coast Walk using the characteristics of exceptional experiences as criteria.

The Concept

The Great South Coast Walk is a concept that connects existing and proposed walking trails along the NSW South Coast such as the Royal National Park Coast, Aboriginal heritage tracks such as the Bingie Dreaming Track near Tuross Heads and the Light to Light Track near Eden to create a 660km linear trail. Divided into segments, the walk combines easy strolls along urban coastal pathways with accommodation, transport and other visitor services offered by local towns and villages, to more challenging overnight walks in some of NSW’s most stunning national parks.

The idea of developing the walk has been discussed for many years. The main drivers behind the proposal are economic development through tourism and improving access opportunities for local people. By leveraging the significant investment already made by local councils and the NSW State Government in walking tracks along the South Coast, some stakeholders believe that the Great South Coast Walk concept has the potential to become Australia’s first long-distance coastal walking trail that will position the south coast as NSW’s premier walking destination that generates significant social, economic and employment benefits for the region.

The Route

The walk is currently promoted as an experience that can be completed in eleven segments, with each section an average of 60 km to be walked over 3 days. A dedicated website <https://greatsouthcoastwalk.net/> promotes the walk, track routes, points of interest, places to stay and eat together with information on track conditions, itineraries, highlights and ‘track issues’ and alternative routes.

The walk incorporates several existing popular tracks that are promoted, managed and utilised for varying purposes by separate agencies. It includes national parks and reserves managed by the NSW National Parks and Wildlife Service and one national park managed by the Australian Government (Jervis Bay) as well as many walking tracks managed by the seven local councils located on the NSW South Coast. The walk starts close to Sydney where visitors can catch a train from Sydney to Cronulla and then the ferry to the coastal village of Bundeena. Bundeena is on the edge of the Royal National Park where the start of the Great South Coast Walk along the ‘Royal Coast Track’ begins. The individual segments of the walk promoted on the website are:

1 - Royal National Park/Escarpment	2 - The Illawarra and Kiama Coasts
3 - The Shoalhaven	4 - Jervis Bay to Ulladulla and Jervis Bay
5 - The Murramarang Coast	6 - The Eurobodalla Coast
7 - The Eurobodalla Coast	8 - Mimosa Rocks National Park
9 - The Sapphire Coast	10 - Ben Boyd National Park Coast
	11 - Nadgee-Howe Wilderness

The walk finishes at the Victorian border with an option to walk to Mallacoota in Victoria.

Route alignment and characteristics of long-distance trails have a very strong bearing on who and how they are used. Since information on the walk has been made available through the website, social media and word of mouth through bushwalking groups, a growing number of local and international walkers have attempted the entire walk.

Appendix F provides an overview of each Section as presented on the website including distance, grading, land management, existing facilities and issues/opportunities.

Assessment of the Great South Coast Walk Concept

An assessment of the Great South Coast Walk against the criteria described in Chapter 3 is presented in Table 3. The assessment suggests that the Great South Coast Walk generally performs well overall in terms of what is required to deliver a high-quality signature experience. It has the potential to combine exceptional natural assets, tourism infrastructure and a suite of commercial experiences for domestic and international visitors. Importantly it has the potential to position the South Coast as Australia's premier coastal walking destination.

Strength and opportunities

From a walking perspective, the Great South Coast Walk:

- offers the potential to be NSW's first long distance signature coastal walk
- connects with a series of well recognised regional trail experiences at the core of the South Coast nature tourism offering
- provides the 'hook' that the existing local and regional trails need to provide national and international status
- provides enough status to increase repeat visitation and extend the walking season
- is readily accessible to Sydney and Canberra enabling easy access for short stay visitors whose primary reason for visiting the region is to undertake a walk
- connects well-established trails and tourism destinations with existing infrastructure and services to support visitors, community, families and young people
- offers many opportunities to integrate with other experiences such as wildlife viewing, food and wine etc
- offers a range of options to suit walkers' preferences by adjusting the walk lengths, trail types and additional activities
- offers stunning and recognised imagery along many parts of the walk
- offers potential for integrated mix of land and water-based experiences such as sea kayaking, scuba-diving, eco-boat cruises
- is supported by commercial tour operators who have expressed their interest in delivering experiences along the coast to a range of markets
- is supported by local businesses who see the opportunity
- has an established market presence via the existing website, through social media and word of mouth via bushwalking groups and print media (Canberra Times in October 2019).

Challenges

Early planning for the concept of the Great South Coast Walk identified ways that the existing south coast walking trails could be connected in order to establish one long distance linear trail. There are some challenges with respect to this concept as follows:

- Some small sections of the walk require access to private land and approval from the landowner will be required
- Some small sections do not have formed walking tracks and require access via roads and extensive beach walking
- There are many river crossings requiring walkers to wade or swim or organise boat transfer
- Some gaps in the track network (such as in Mimoso National Park).

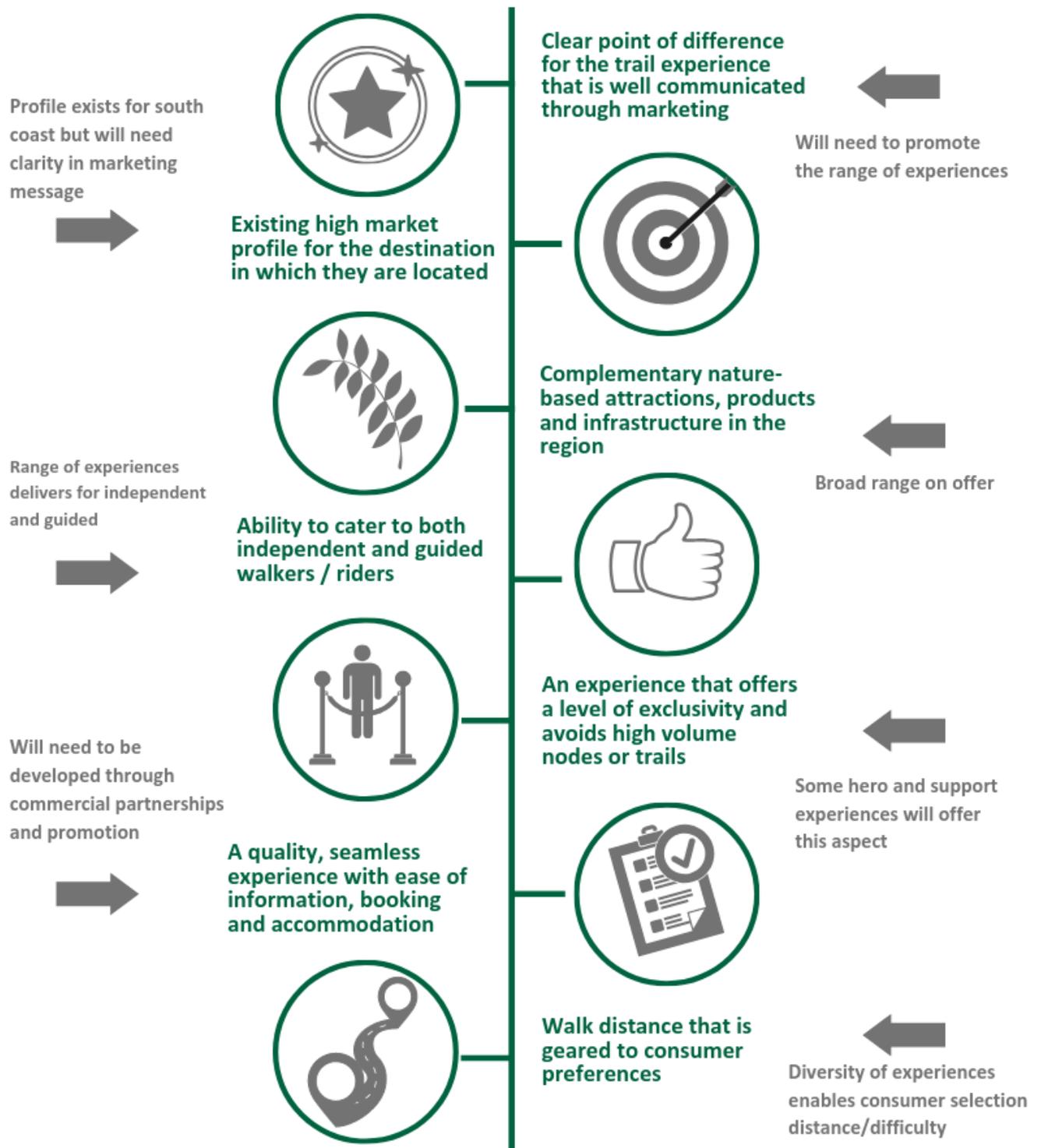
These aspects of the route could, potentially, dilute the excellence of the experience offered to visitors. The need to navigate river crossings, walk on roads or undertake significant lengths of beach walking and similar, while offering a challenge to some walkers, will not appeal to the broader walking market. Some of these issues can resolve with the assistance of commercial operators providing transfer services etc.

Other challenges of the concept include:

- Gaps in the sections of the walk on public land have considerable potential but require planning, development and land manager commitment to invest in these trail gaps
- Co-ordination across local councils and state government agencies to take a collective view of investment, marketing and management of the walk as they are currently focussed on their own individual assets that make up the Great South Coast Walk
- The name suggests that the Great South Coast Walk is one long distance walk and may be confusing to the market
- Lack of overarching governance model that will support development



ASSESSMENT AS A SIGNATURE WALKING EXPERIENCE GREAT SOUTH COAST WALK



The following assessment evaluates the proposed Great South Coast Walk against the range of assets and experiences required to be developed and promoted as a national and international walk.

Table 3. Assessment of the Great South Coast Walk

Consumer expectations (Variety, challenge and sustainability)	Trail Rating	Assessment
Spectacular settings and encounters with wildlife	😊😊😊	Numerous exceptional settings and opportunities for marine and terrestrial wildlife viewing with different seasonal experiences
Variety in scenery and terrain	😊😊😊	The ideal is a change in scenery at least every half day
Showcase Australian unique nature, culture and landscape	😊😊😊	Many and varied experiences that can showcase these factors from Nadgee wilderness to coastal lighthouses, European and Aboriginal cultural heritage and diverse coastal and hinterland national parks
Nature based adventure experience	😊😊😊	A range of nature-based experiences that suit different ages, fitness levels, security and interest
Step on and step off opportunity	😊😊😊	Multiple opportunities for trail heads and accommodation options along the length of the coastline
Information - web site access	😊	Individual experiences have current information, but will need new approach to whole of coast marketing
Wayfinding and on trail signage	😞	
Maps, guides and on-site information	😊	As above
Accessibility through tourism providers	😊😊	Several commercial operators offering walks on different trails with a number indicating interest in expanding to offer more experiences along the length of the trail
Public transport and vehicle parking	😊	Limited public transport; parking at main trailheads; operators would be encouraged to increase the range of transport services to trail heads and support seamless walking experiences
Accommodation	😊😊	Broad diversity of accommodation from higher end to on track camping; packaging and bundling walks with accommodation, shuttles and guides will be essential Spaced at intervals reflecting distance most users wish to travel in a day, approx. 16-24km for walkers per day
Walking products and services	😊	

Consumer expectations (Variety, challenge and sustainability)	Trail Rating	Assessment
High track quality	😊😊	All land managers committed to sustainable trail development
Trail based events	😞	Currently limited but could offer potential for marketing new experience
Short walk component	😊😊😊	Multiple options for short walks as part of individual lead experiences as well as specific short walks
Day walks	😊😊😊	As above
Multi Day walks	😊😊	Several individual multi day walks exist on the coast and are well developed for target markets – all achievable within less than 1 week
Accessible - linear or circular trails without gaps	😊	Small gap in trail and 30 river crossings road walking
Easily divisible into sections	😊😊😊	Can be walked as separate sections and walkers ticking off each achievement
Challenging but not too over-daunting	😊😊😊	Australian Walking Track Grading System Grade 1 - Grand Pacific Walk plus some shorter walks are accessible for people with a disability Range of walks at Grade 2, 3 and 4 standard Nadgee Wilderness plus aspects of some other remote trails at Grade 5

Analysis

The Great South Coast Walk presents the opportunity for walkers to enjoy the NSW coastline passing through twelve national parks, six nature reserves and conservation areas, significant cultural and historic sites, native forests and coastal villages. The walk will offer a range of opportunities for domestic and international visitors from easy strolls along urban coastal pathways with accommodation, transport and restaurants to more challenging walks that provide for remote walking and camping in NSW's most outstanding national parks.

Experience of other long-distance walks suggests that whilst they may get high numbers of walkers, this is generally on certain sections of trail, some short walks, and often high numbers close to communities/towns. The numbers of people walking long-distance trails end to end is low, and often this is done in small sections and repeat visits over several years.

The name "The Great South Coast Walk" is unlikely to resonate well with consumers and may confuse people given the number of "south coasts" that exist across Australia and the world. Rebranded however, the cluster of walks from Sydney to the border presents an opportunity to become one of Australia's iconic walking destinations focusing on a spine that offers a diversity of experiences and additional inland opportunities and a focus for visitors and the community to explore the walking experiences of the South Coast region.

Recognising the consumer preference for shorter walks, the Great South Coast Walk can easily be divided into sections, each section offering 3-4 days of outstanding walking experiences involving the well-established and popular walks such as the Royal Coastal Track, Grand Pacific Walk, Murramarang Coast Walk, and the Light to Light walk. These walks will provide the skeleton of the concept and the 'signature experience's. The Great South Coast Walk will bind them together to establish the south coast as Australia's premier coastal walking destination.

The various trail segments will encourage walkers to 'tick-off' more than one segment of the walk, encouraging repeat visitation and extend the walking season. Individual walks can continue to be promoted and sold into the market (e.g. Light to Light) with a combined Great South Coast Walk approach assisting in 'dialling up' the experiences and the destination.

Supporting experiences and extension walks can also be added. Walks in the hinterland areas and further afield to alpine areas in Kosciuszko National Park will encourage repeat visitation. In addition, the short walks in the South Coast region are of significant quality to be promoted as a short walk collection.

The strategic benefits of this collective approach are presented in Figure 3.

This approach also overcomes the issues associated with missing sections of track or the less desirable walking routes and will appeal to a much broader section of the market. Over time, the gaps can potentially be addressed (subject to funding) and added to the walking experiences on offer. They are not seen as a barrier to the concept being developed.

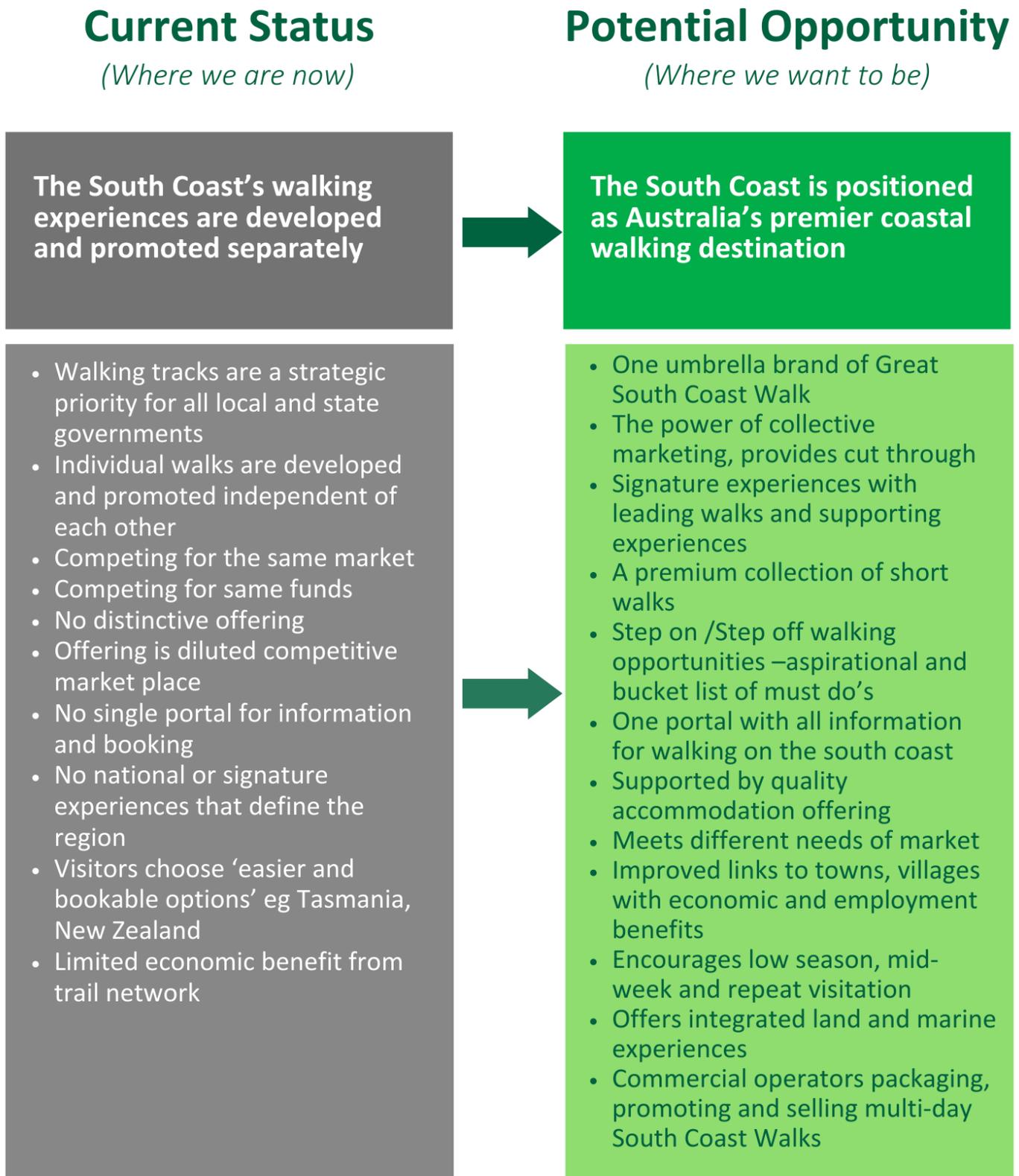
Consultation with commercial tour operators currently offering walks, nature-based experiences, accommodation and transport for visitors to the South Coast support the concept. Some operators indicated they would leverage the opportunity and would scale up their marketing activity to include the Great South Coast Walk. Others indicated they would expand their product offering (accommodation transfers, baggage and passenger transfer) and develop experiences that capitalised on different sections of the coast.

The region's existing walking experiences are strong enough that if they are collectively presented to the market, they have the pulling power to position the region as the Australia's premium coastal walking destination.

The Great South Coast Walk concept presents an opportunity to define the destination, its place, its people and stories and provide a focus for marketing. With the suggested refinements, it has the potential to support NSW and the region's tourism growth targets and support the economic development strategies of the region.



Figure 4. Strategic Benefits of the Great South Coast Walk – A Collective of Premium Walking Experiences





5. Establishing the Great South Coast Walk – Australia’s Premier Coastal Walking Experience

This section presents a revised concept of the Great South Coast Walk that will position the South Coast Region as Australia’s premier coastal walking experience.

Ambition

The Great South Coast Walk will expose visitors to the wild coastal beauty that has no equal in the world. It will leverage five well established walks of Royal Coast Walk, Grand Pacific Walk, Kiama Coastal Walk, Murramarang Coastal Walk and the Light to Light Walk. As other walks are developed or extended, they can be added.

It will be presented as iconic 3-4 day walks as well as longer walking options to create aspiration and encourage repeat visitation.

It will be the catalyst for an exceptional array of nature and marine based adventure opportunities that create an outstanding experience for a range of markets.

It will be a flexible experience tailored to meet the needs and preferences of different visitors and markets in relation to the overall duration of the experience, the length of daily segments and the location and type of accommodation.

It will appeal to a range of markets and will include:

- Day walks: Taking an hour-long amble or all day rigorous walk and returning to accommodation the same day
- Multi-day walks: From backpacking on a one-night overnight trip to section-hiking large portions of the Great South Coast Walk. Multi-day walkers can tackle any stretch of the Great South Coast Walk
- The Through Walk: Walking the entire Great South Coast Walk supported by commercial operators who arrange for transfers to and from walking tracks and accommodation.

It will be a self-guided experience using campsites or off-trail accommodation or through commercial accommodation supported commercial tour operators providing transfers, transport, accommodation and regional food and wine and other services.

Vision

The Great South Coast Walk is Australia's ultimate coastal walking adventure on the edge of the largest island on earth

This vision encompasses:

The Great South Coast Walk – is the description of the offer which helps to reinforce that it is an extended experience.

Australia's ultimate coastal adventures in nature – tells us that this experience is aspiring to be an outstanding nature-based experience within Australia, bringing Australia's perceived (and promoted) competitive advantages to life, delivering on the motivations and dreams of international and domestic markets alike.

Whilst the working name for the experience has been the Great South Coast Walk, further work will be required to ensure a suitable name that delivers on the positioning and resonates with the consumer.

While not a traditional 'end to end' product, the Great South Coast Walk has the potential to offer something unique that delivers on nature - the region's core strengths. That uniqueness coupled with the ability to walk and stay in accommodation of choice means this product can be well differentiated to stand out in the increasingly crowded nature-based marketplace.

The goal in developing the Great South Coast Walk will be to create experiences that achieve this vision and deliver on the positioning of the trail in the marketplace.

Principles

The following principles will underpin the provision and promotion of the Great South Coast Walk and the high-quality trail experiences within it.

- High quality, diverse walking experiences - Trails will offer exceptional experiences for visitors that complement the natural and cultural assets of the South Coast region
- Inclusive - The Great South Coast Walk has broad appeal and a diverse range of walking options for people of different capacities and interests
- Sustainable – The Great South Coast Walk will be financially, socially and environmentally sustainable to enable the achievement of the vision in the longer term
- Collaborative - The success of the Great South Coast Walk relies on the State and local Government, community, private sector and indigenous partners working together. Cooperation will also contribute to building a walking destination culture within the region.
- Connected - The Great South Coast Walk experiences are integrated with the broader experience offer of the region. This distinction means that walking becomes a cross-cutting theme and influences the way that marketing and promotion of the region reinforces seeing and experiencing the region on foot as a core proposition
- Good governance and strong partnerships - Partnerships will be established between government, the private sector and tourism industry to deliver a range of outstanding trail experiences and support services that meet market needs
- Visible Benefit – the Great South Coast Walk will deliver social, economic and health benefits to local communities including opportunities for Indigenous people to gain income and employment.

The Target Market

The target markets for people seeking to undertake a signature walking style experience are Australian domestic overnight visitors and international visitors. The target market for the Great South Coast Walk is the lifestyle leader and high value traveller. These markets are also the target market for Tourism Australia. They like to spend more, disperse into regional areas and stay longer, desiring nature and wildlife and aquatic and coastal experiences – a direct match for the type of experience the Great South Coast Walk offers.

Lifestyle Leaders cut across all life stage and socio-economic segments. They are educated, professional, and progressive individuals (incl. non-religious). They enjoy seeking out information and be the first to try and buy new products. Higher in affluence and discretionary expenditure they can afford to indulge more often than the average Australian. This includes travel. They have a busy social life and extensive social networks and as trusted advisors can and do influence others. As this segment is based on a mindset they cut across all regions, age and lifecycle groups however do skew younger.

NPWS segmentation studies¹¹ identify visitors to national parks in NSW as Adventurers, Explorers, Socialisers and Escapers. A summary of the characteristics of each segment is presented in Table 4.

¹¹ Annual Visits to NPWS Managed Parks in New South Wales, Roy Morgan, August 2019

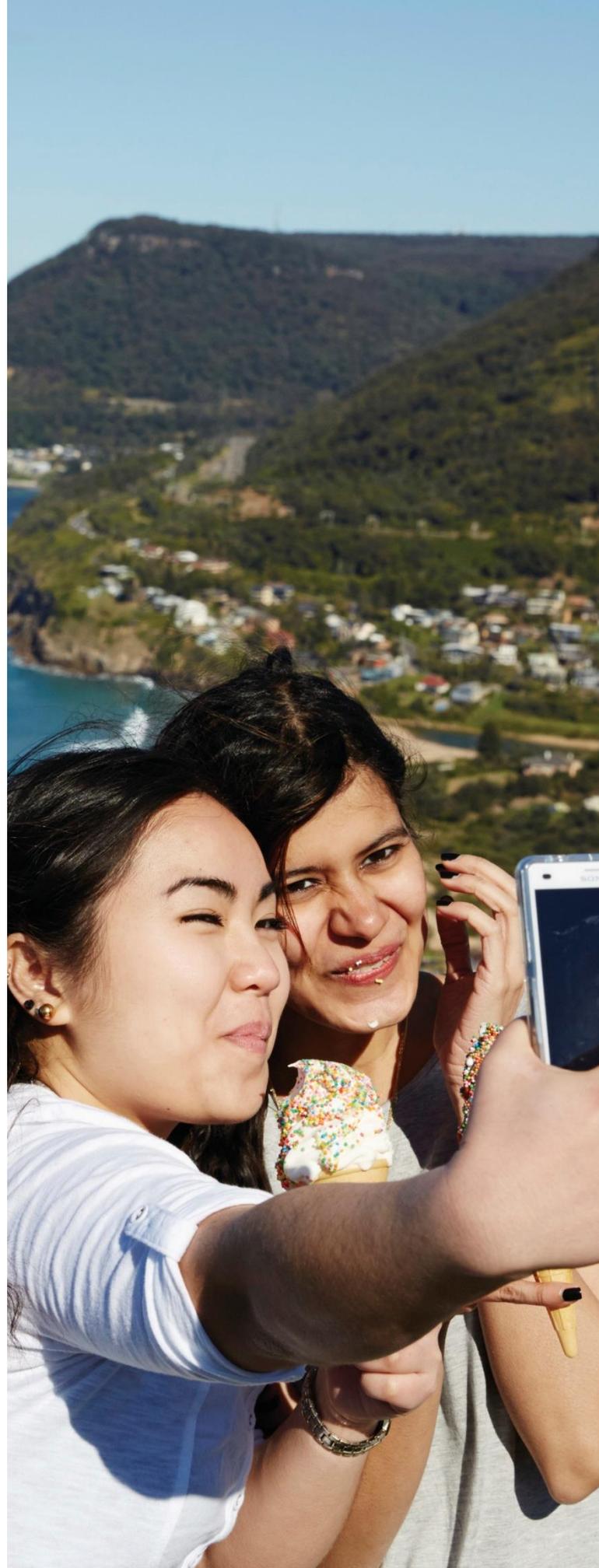


Table 4. Market Segments, NSW National Parks¹²

Market Segment	Characteristics	Option for overnight stay	Target Market
<i>Adventurers</i>	Looking for parks to provide venues where they can do their own thing, be spontaneous and independent, where they can be with nature and where walking is great.	Married or de facto, working full time, motivated by cultural and educational experiences, and wanting family friendly activities (especially for under 5 year olds). Likely to come from remainder NSW (28.8%), ACT (24.9%) and to a lesser extent, Sydney (20.3%),	Yes
<i>Explorers</i>	Don't want to go to the same place twice, like to do the same activity in different places (fish, surf etc.) and are enticed with special deals, events and word of mouth recommendations.	Are aged 18-34 with children. They have completed tertiary education and work full time. They are passionate about national parks and seek balance and wellness activities. They want nature-based escape experiences that encompass adventure/outdoor activities that can be done as couples and young adult singles leveraging varied accommodation.	Yes
<i>Socialisers</i>	Groups for whom the park is a backdrop – a low cost venue or a venue where they can exercise, or where they'd want to take children to see the natural world.	Married/de facto, working full time with younger children and are interested in overnight camping/bushwalks, adventure, plus guided tours that open up adventure experiences.	Yes
<i>Escapers</i>	looking for nature to provide a venue to slow the pace down and allow them to put life into context. This may be a venue that has arts, where there is no pressure and does not require walking.	Couples and singles aged 25-29 and families with older children. They are well educated and generally work full time. They have a keen desire to visit but need reasons to get parks into the diary. They need great accommodation options with associated discovery experiences.	Yes

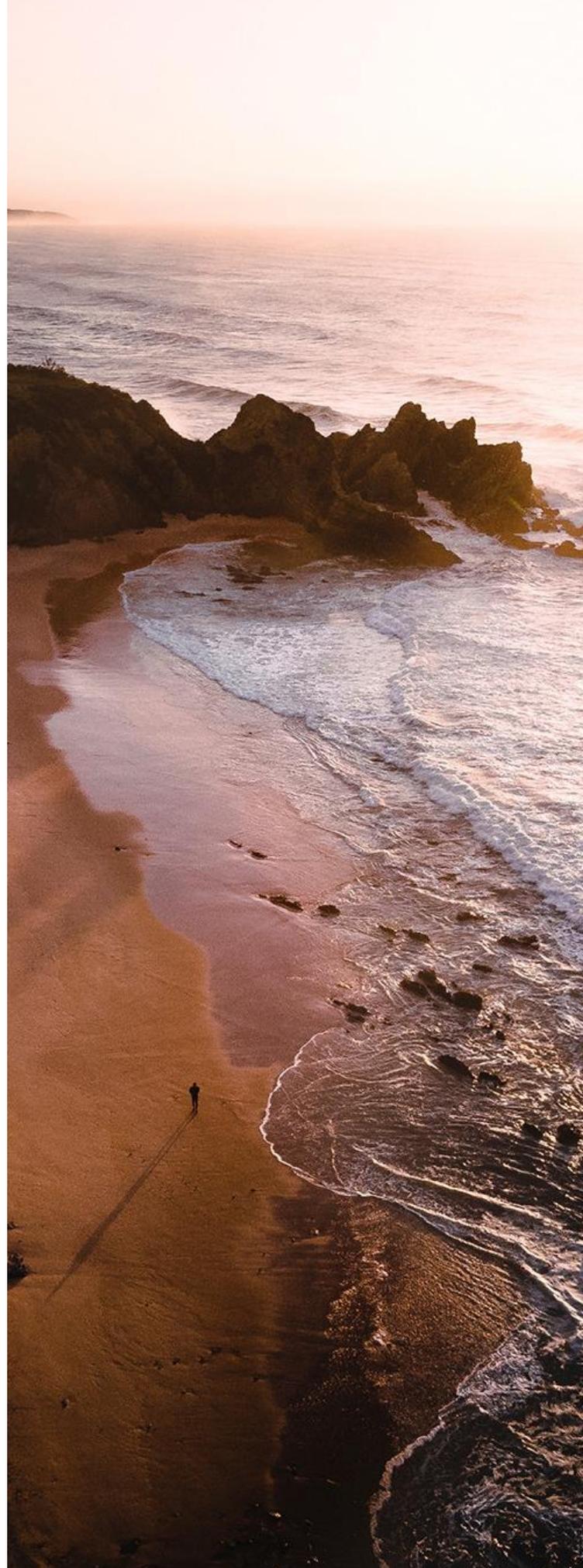
¹² Annual Visits to NPWS Managed Parks in New South Wales, Roy Morgan, August 2019

Leading and Supporting Experiences

This report recommends that a suite of leading and supporting walking experiences be further developed and promoted as a pillar for the NSW South Coast as an exceptional walking destination under the umbrella of the Great South Coast Walk. Leading walking experiences are, or have the potential to be, flagships for the region and are consistent with international, national and state significance. Developing packages with a range of operators to ensure visitors can easily access these leading walking experiences with supporting products and services is critical to the Great South Coast Walk's success.

Supporting trails have an important but less prominent role and provide a quality visitor experience to support the leading trails by extending the length of stay for visitors and offering significant recreational opportunities for regional communities.

The leading and supporting walking experiences on the Great South Coast Walk are presented in Figure 4 and summarised on the following page.



Royal Coastal Walk

A 26-kilometre track along the coast of Royal National Park offering amazing views of the landscape and coastline. Places such as Wattamolla, Garie, Burning Palms, Era Beach and Eagle Rock provide stunning views. Visitors can experience the beauty of local landscapes and wildlife including whale watching. This section of the walk can be completed over two or three days.

Extension options - This part of the Great South Coast Walk can be packaged with the Grand Pacific Walk to provide visitors with the option of walking from Sydney to Wollongong.

The supporting walking experience is the Illawarra Escarpment Trail.

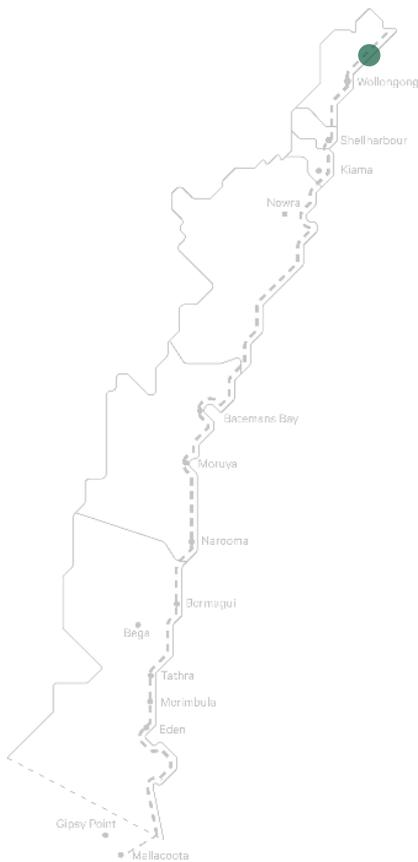


Grand Pacific Coast Walk

The Grand Pacific Walk is one of the more spectacular parts of the coastline. The steep slopes of the escarpment adjoin the narrow coastal strip, creating panoramic views of the land and sea. Further south the walk links up with the popular 'Blue Mile' shareway with its quality accommodation and restaurants. This part of the walk can be completed over two days.

Extension options - this part of the Great South Coast Walk can be packaged with the Kiama Coastal Walk to offer visitors the option to extend the walk to Geroa (proposed).

There supporting walking experiences are Round the Lake Illawarra (proposed) and Killalea State Park.



Kiama Coastal Walk

This 22km stunning walk to Gerringong has several highlights including Minnamurra River, a lovely spot for picnics and kayaking, extraordinary volcanic formations of Cathedral Rocks, Bombo Headland's basalt columns, Kiama Blowhole and the Little Blowhole Werri Beach and the many shops and cafes in Kiama Village. This part of the walk can be completed over two or three days.

Extension options – This walking experience can be extended and packaged to offer visitors the option to extend the walk to Shoalhaven Heads.

The supporting walking experiences are Seven Mile Beach (sand), Round the Bay and Hyams Beach Walk, Jervis Bay.

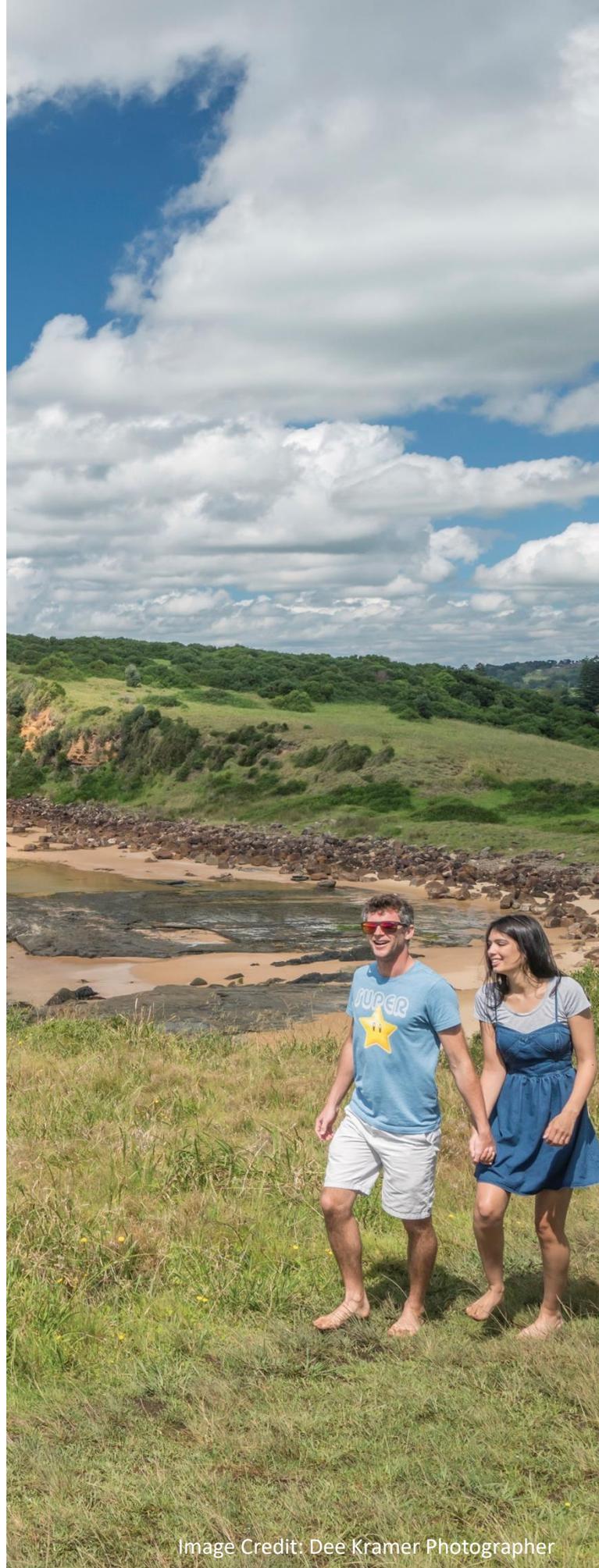


Image Credit: Dee Kramer Photographer

Murramarang - South Coast's five villages walk

This 46-kilometre adventure starts near Batemans Bay and traversing the spectacular coastline of Murramarang National Park. The walk connects the coastal villages of Maloney's Beach, Durras, Depot Beach, Kioloa and Bawley Point. The natural landscapes, vegetation and wildlife combines with ancient rock formations and ocean vistas to create many memorable moments for walkers.

Extension options - This part of the Great South Coast Walk can be extended and packaged to include the Coastal Headlands Walking Trail - Batemans Bay to Mackenzie's Beach (Proposed).

The supporting walking experiences are Narrawallee Inlet Walking Track (Ulladulla) and the Bingie Dreaming Track, Tuross Heads.



Light to Light Walk

Located in Ben Boyd National Park, the upgraded Light to Light Walk will be a fully immersive 4-day experience that combines walking and eco-accommodation in one of the most remote and dramatic settings in Australia. The project will deliver a spectacular 30-kilometre coastal walk supported by roofed accommodation, located in the Ben Boyd National Park on the Sapphire Coast of New South Wales.

Extension options - This part of the Great South Coast Walk can be extended and packaged to walk to Nadgee Wilderness and to Mallacoota in Victoria.

The supporting walks are the Bundian Way Story Walk (and extension to the Bundian Way when developed), and Kangarutha walking track, in Bournda National Park.

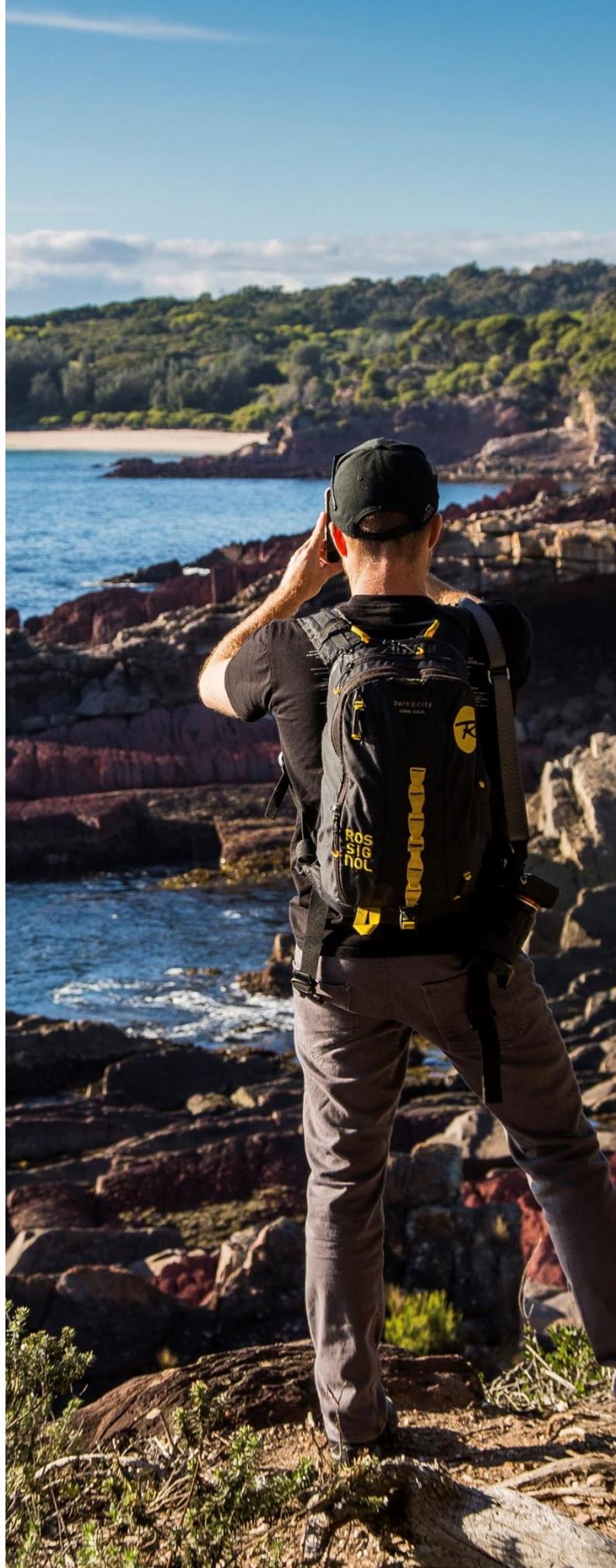


Figure 5. The Great South Coast Walk – Leading and Supporting Experiences



Royal Coastal Walk

A 26-kilometre track along the coast of Royal National Park
 Highlights: Amazing views of the landscape and coastline of Australia's oldest national park.
 Duration: 2/3 days
 Extension options: Grand Pacific Walk to Wollongong
 Supporting walking experience: Illawarra Escarpment Trail



Grand Pacific Coast Walk

A 60km walk from Royal National Park to Lake Illawarra
 Highlights: Outstanding coastal and escarpment views supported by quality accommodation and restaurants.
 Duration: 2/3 days
 Extension options: Kiama Coastal Walk
 Supporting walking experiences: Round the Lake Illawarra (proposed) and Killalea State Park



Kiama Coastal Walk

This 22km walk from Minnamurra River to Gerringong
 Highlights: Cathedral Rock, Bombo, Kiama Blowhole, rock pools and beautiful beaches and cafes and restaurants in Kiama Village
 Duration: 2/3 days
 Extension options: Option to extend the walk to Shoalhaven Heads via Seven Mile Beach. Enjoy the spectacular marine life in Jervis Bay
 Supporting walking experiences: Seven Mile Beach (sand), Round the Bay and Hyams Beach Walk, Jervis Bay



Murramarang Five Villages Walk

This 46-kilometre adventure traversing the spectacular coastline of Murramarang National Park from Bawley Point to Maloney's Beach
 Highlights: Wildlife, rock pools and secluded beaches with a backdrop of forested hills and spotted gum forest floors smothered in Burrawang palm
 Duration: 3/4 days
 Extension options: Option to extend the walk to Coastal Headlands Walking Trail - Batemans Bay to Mackenzie's Beach (Proposed) and Bingie Dreaming Track to Tuross Heads
 Supporting walking experiences: Narrawallee Inlet Walking Track (Ulladulla) and the Bingie Dreaming Track, Tuross Heads.



Light to Light Walk

A 30-kilometre coastal walk in Ben Boyd National Park with eco-accommodation in one of the most remote and dramatic settings in Australia.
 Highlights: Heritage lighthouse and accommodation, whale watching and eating freshly shucked oysters.
 Duration: 4 days
 Extension options: Extend the walk to Nadgee Wilderness and to Mallacoota in Victoria.
 Supporting walking experiences: the Bundian Way Story Walk (and extension to the Bundian Way when developed), and Kangarutha walking track, Bournda National Park

Photo Credit: Destination NSW, David Rogers, Jordan Robins

Competitor Analysis

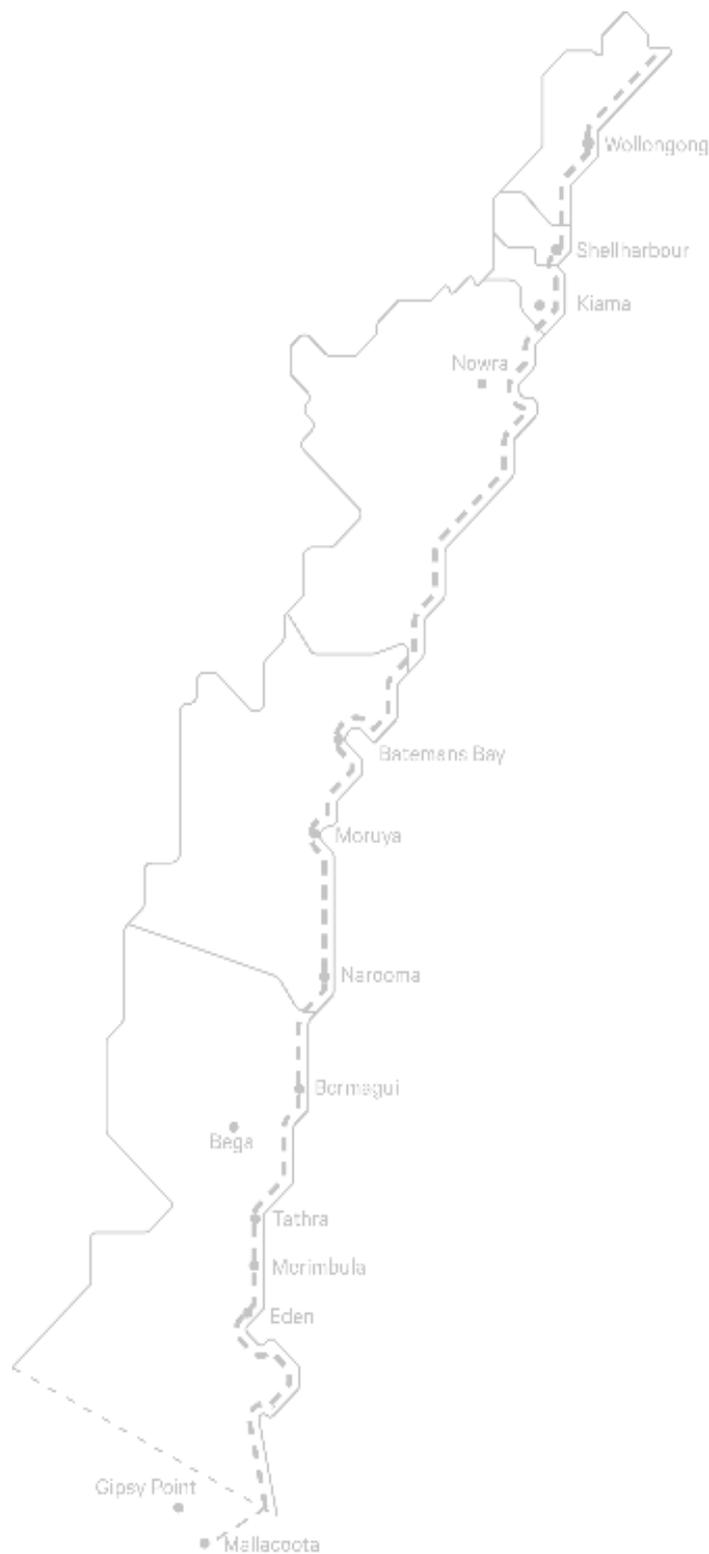
An appreciation of the 'competition' is vital to determining the feasibility of establishing the Great South Coast Walk.

There are only three walks of comparable or greater distance to the Great South Coast Walk in Australia: the Heysen Trail (1200 km), Bibbulmun Track (970 km) and Australian Alps Walking Track (650 km). All have deserved reputations, but apart from the first 70km of the Heysen Trail and last 200 km of the Bibbulmun Track, these tracks are essentially inland routes.

Research also suggests that few people walk them in their entirety. Most people do popular sections or else, those that do the whole route generally do one section and return to do another section.

Other multi day coastal walks such as the Great Ocean Walk (Vic), Three Capes and Bay of Fires (Tas), Fraser Island (Qld), and Cape to Cape Walk (WA) offer quality experience in one location. The Great South Coast Walk will be a distinctive experience that stands out from other multi-day coastal trail experiences in Australia. Great South Coast Walk is unique in a national context, and cannot be replicated elsewhere due to the following attributes:

- A multitude of walking options from easy day walks for people of all abilities through to extended wilderness walks
- Diversity of different coastal environments on the east coast of Australia, scenery, wildlife and unspoilt beaches
- Outstanding marine wildlife viewing opportunities
- Opportunities for integrated land and marine experiences
- Opportunities for cultural experiences – connection with Aboriginal people and culture
- Range of different accommodation options from camping to high end luxury houses and hotels
- All services available to enable experiences from different access points
- Easily accessible from established visitor nodes for a range of markets.





6. Benefits of the Great South Coast Walk

This section summarises the potential benefits of the Great South Coast Walk to the region and the communities within it.

The estimated impact of the Great South Coast Walk on the number of walkers and their spending within each Local Government Area in the South Coast Region is significant. Whilst there is no direct data that provides trail user numbers, several data sets have been used to develop estimates of trail use and estimated expenditure.

Growth Projections 10 Years – Total Walkers

A base level of walkers is estimated for 2018 based on available data (combined with some assumptions) and growth is modelled for 3 scenarios (1% annual growth; 3% annual growth; and 5% annual growth) over a 10 year period. The 3% growth scenario has been used to analyse types of walker and their spending, as it is consistent with the ten-year growth forecast for tourism in NSW and the South Coast region. The 5% annual growth may be achievable if the South Coast Region is positioned and marketed as Australia's leading coastal walking destination and the Great South Coast Walk is established.

Table 5 summarises the estimated total number of walkers based on each growth rate over ten years as a result of the Great South Coast Walk. For example, with a 3% annual growth rate, the number of walkers across the region will increase from 1.695 million to 2.276 million, an increase of 582,855 over the 10 years from 2018 to 2028. A 5% annual growth rate would result in an increase of 1,065,824 walkers over the same period.



POTENTIAL BENEFITS OF THE GREAT SOUTH COAST WALK AUSTRALIA'S PREMIER COASTAL WALKING EXPERIENCE

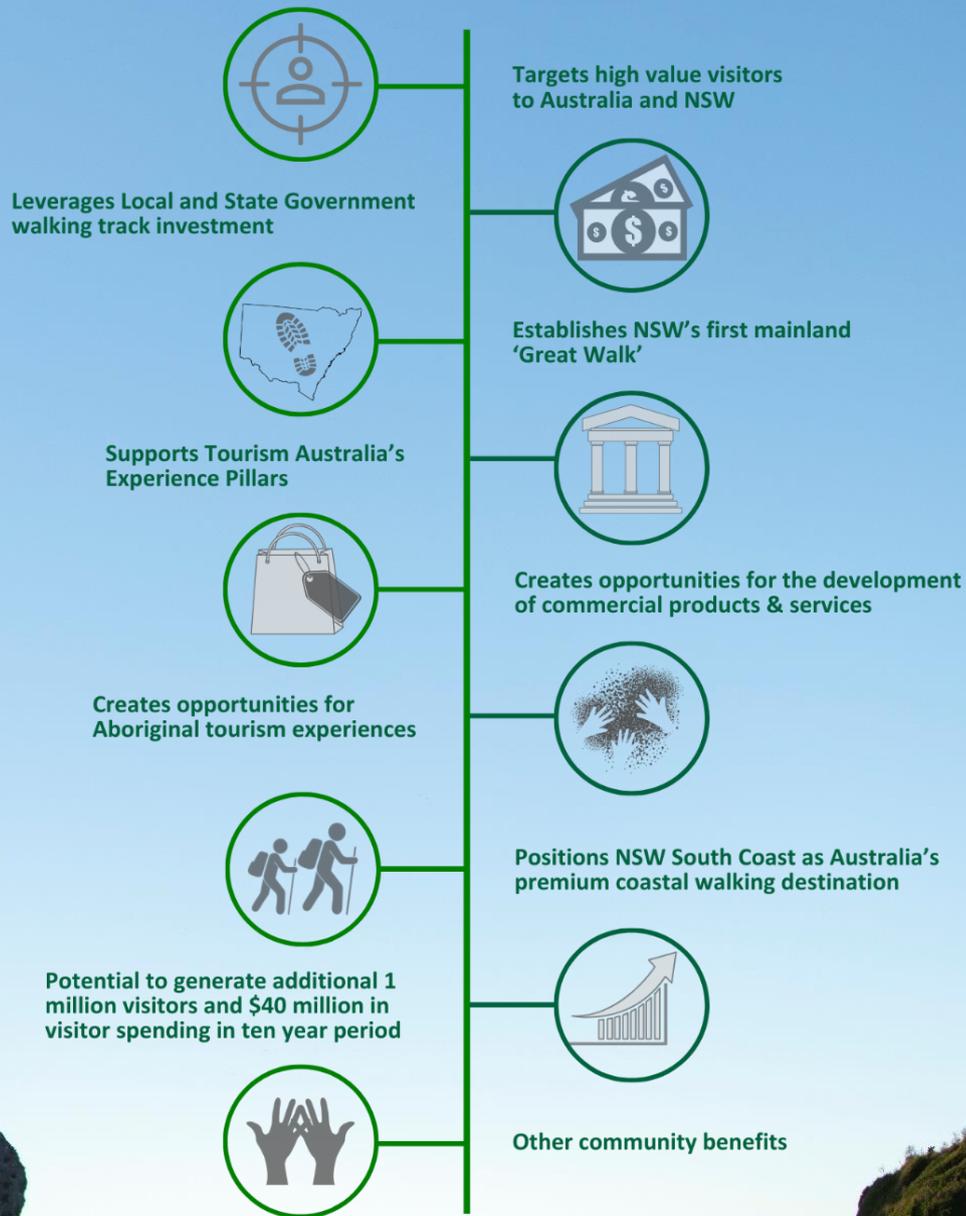


Table 5. Growth Projections – Great South Coast Walk – Total Walkers

Summary Total Walkers (Estimates)												
LGAs	2018	YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5	YEAR 6	YEAR 7	YEAR 8	YEAR 9	YEAR 10	Total Increase
Walkers – 1% Annual Growth	1,694,758	1,711,706	1,728,823	1,746,111	1,763,572	1,781,208	1,799,020	1,817,010	1,835,180	1,853,532	1,872,068	
Increase		16,948	17,117	17,288	17,461	17,636	17,812	17,990	18,170	18,352	18,535	177,309
Walkers – 3% Annual Growth	1,694,758	1,745,601	1,797,969	1,851,908	1,907,465	1,964,689	2,023,630	2,084,339	2,146,869	2,211,275	2,277,613	
Increase		50,843	52,368	53,939	55,557	57,224	58,941	60,709	62,530	64,406	66,338	582,855
Walkers – 5% Annual Growth	1,694,758	1,779,496	1,868,471	1,961,895	2,059,989	2,162,989	2,271,138	2,384,695	2,503,930	2,629,126	2,760,583	
Increase		84,738	88,975	93,424	98,095	102,999	108,149	113,557	119,235	125,196	131,456	1,065,824

Growth Projections 10 Years – Total Walkers by Local Government Area

The following table shows walkers in each of the LGAs based on a 3 % annual growth rate over 10 years. The figures demonstrate that each of the Local Government Areas will benefit from a lift in walking tourism over the next ten years with the development of the Great South Coast Walk.

Table 6. Growth Projections – Great South Coast Walk – Total Walkers by LGA

TOTAL WALKERS (ESTIMATES) - 3% Annual Growth												
LGAs	2018	YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5	YEAR 6	YEAR 7	YEAR 8	YEAR 9	YEAR 10	Total Increase
1. Wollongong LGA	598,153	616,097	634,580	653,618	673,226	693,423	714,226	735,652	757,722	780,454	803,867	
2. Shellharbour LGA	83,383	85,885	88,461	91,115	93,849	96,664	99,564	102,551	105,627	108,796	112,060	
3. Kiama LGA	193,321	199,121	205,094	211,247	217,585	224,112	230,835	237,761	244,893	252,240	259,807	
4. Shoalhaven LGA (Nowra and Ulladulla)	457,267	470,985	485,114	499,668	514,658	530,098	546,000	562,380	579,252	596,629	614,528	
5. Eurobodalla LGA (Batemans Bay, Moruya)	209,572	215,859	222,335	229,005	235,875	242,951	250,240	257,747	265,479	273,444	281,647	
6. Bega (Eden, Merimbula, Tathra, Bermagui)	153,063	157,655	162,384	167,256	172,273	177,442	182,765	188,248	193,895	199,712	205,703	
Total All LGAs	1,694,758	1,745,601	1,797,969	1,851,908	1,907,465	1,964,689	2,023,630	2,084,339	2,146,869	2,211,275	2,277,613	Total Increase
Increase		50,843	52,368	53,939	55,557	57,224	58,941	60,709	62,530	64,406	66,338	582,855

Walker Spending - LGA

Table 7 shows the estimated spending in the local government areas by walkers, for the 3% growth scenario. The total spending across the South Coast Region will increase from \$115.921 million in 2018 to \$155.789 million in year 10, an increase of \$39.867 million. Under a 5% growth scenario the benefits are estimated to be significantly greater.

Table 7. Great South Coast Walk - Expenditure in Local Government Areas

Summary SPENDING BY WALKERS - 3% Annual Growth												
LGA	2018 Total Walkers	YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5	YEAR 6	YEAR 7	YEAR 8	YEAR 9	YEAR 10	Total Increase 10 Years
1. Wollongong LGA	\$40,913,650	\$42,141,060	\$43,405,291	\$44,707,450	\$46,048,674	\$47,430,134	\$48,853,038	\$50,318,629	\$51,828,188	\$53,383,034	\$54,984,525	\$40,913,650
INCREASE		\$1,227,410	\$1,264,232	\$1,302,159	\$1,341,224	\$1,381,460	\$1,422,904	\$1,465,591	\$1,509,559	\$1,554,846	\$1,601,491	\$14,070,874
2. Shellharbour LGA	\$5,703,411	\$5,874,513	\$6,050,749	\$6,232,271	\$6,419,239	\$6,611,816	\$6,810,171	\$7,014,476	\$7,224,910	\$7,441,658	\$7,664,907	
INCREASE		\$171,102	\$176,235	\$181,522	\$186,968	\$192,577	\$198,354	\$204,305	\$210,434	\$216,747	\$223,250	\$1,961,496
3. Kiama LGA	\$13,223,162	\$13,619,857	\$14,028,452	\$14,449,306	\$14,882,785	\$15,329,269	\$15,789,147	\$16,262,821	\$16,750,706	\$17,253,227	\$17,770,824	\$13,223,162
Total	\$13,223,162	\$13,619,857	\$14,028,452	\$14,449,306	\$14,882,785	\$15,329,269	\$15,789,147	\$16,262,821	\$16,750,706	\$17,253,227	\$17,770,824	
INCREASE		\$396,695	\$408,596	\$420,854	\$433,479	\$446,484	\$459,878	\$473,674	\$487,885	\$502,521	\$517,597	\$4,547,662
4. Shoalhaven LGA (Nowra and Ulladulla)	\$31,277,048	\$32,215,359	\$33,181,820	\$34,177,275	\$35,202,593	\$36,258,671	\$37,346,431	\$38,466,824	\$39,620,828	\$40,809,453	\$42,033,737	
INCREASE		\$938,311	\$966,461	\$995,455	\$1,025,318	\$1,056,078	\$1,087,760	\$1,120,393	\$1,154,005	\$1,188,625	\$1,224,284	\$10,756,689
5. Eurobodalla LGA (Batemans Bay, Moruya)	\$14,334,714	\$14,764,755	\$15,207,698	\$15,663,929	\$16,133,847	\$16,617,862	\$17,116,398	\$17,629,890	\$18,158,787	\$18,703,550	\$19,264,657	
increase		\$430,041	\$442,943	\$456,231	\$469,918	\$484,015	\$498,536	\$513,492	\$528,897	\$544,764	\$561,107	\$4,929,943
6. Bega (Eden, Merimbula, Tathra, Bermagui)	\$10,469,485	\$10,783,569	\$11,107,076	\$11,440,288	\$11,783,497	\$12,137,002	\$12,501,112	\$12,876,145	\$13,262,430	\$13,660,303	\$14,070,112	
increase		\$314,085	\$323,507	\$333,212	\$343,209	\$353,505	\$364,110	\$375,033	\$386,284	\$397,873	\$409,809	\$3,600,627
Total All LGAs	\$115,921,469	\$119,399,113	\$122,981,087	\$126,670,519	\$130,470,635	\$134,384,754	\$138,416,296	\$142,568,785	\$146,845,849	\$151,251,224	\$155,788,761	
Increase		\$3,477,644	\$3,581,973	\$3,689,433	\$3,800,116	\$3,914,119	\$4,031,543	\$4,152,489	\$4,277,064	\$4,405,375	\$4,537,537	\$39,867,292

Growth Projections 10 Years – South Coast National Parks

Ten year projections were prepared of walkers based on 3 annual growth rates (1%, 3% and 5%). The base for the projections is the walker estimate for 2018. Table 8 summarises the total walkers in all the parks based on each growth rate. For example, with a 3% growth rate the number of walkers in the South Coast national parks increases from 2.217 million to 2.979 million an increase over the 10 years of 762,451. Royal National Park have been excluded from these figures.

Table 8. Growth Projections South Coast National Parks

Total Walkers (Estimates)												
National Parks	2018	YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5	YEAR 6	YEAR 7	YEAR 8	YEAR 9	YEAR 10	Total Increase
Walkers – 1% PA	2,216,966	2,239,135	2,261,527	2,284,142	2,306,984	2,330,053	2,353,354	2,376,887	2,400,656	2,424,663	2,448,909	
Increase		22,170	22,391	22,615	22,841	23,070	23,301	23,534	23,769	24,007	24,247	231,944
Walkers – 3% PA	2,216,966	2,283,475	2,351,979	2,422,538	2,495,215	2,570,071	2,647,173	2,726,588	2,808,386	2,892,638	2,979,417	
Increase		66,509	68,504	70,559	72,676	74,856	77,102	79,415	81,798	84,252	86,779	762,451
Walkers – 5% PA	2,216,966	2,327,814	2,444,205	2,566,415	2,694,736	2,829,473	2,970,946	3,119,494	3,275,468	3,439,242	3,611,204	
Increase		110,848	116,391	122,210	128,321	134,737	141,474	148,547	155,975	163,773	171,962	1,394,238

COMMERCIAL OPPORTUNITIES

The Great South Coast Walk provides opportunities for the development of commercial products to support walkers including the development and marketing of a variety of packaged products. While there are some commercial operators offering walking experiences on the South Coast, there is significant potential to strengthen this offering. Consultation with commercial operators has confirmed their willingness to invest on the basis that the South Coast Walk becomes an iconic or great walk for NSW.

Walking itineraries can be developed to accommodate:

- Step on, step off day walks with shuttle services and accommodation in local towns
- Step on, step off multi-day walks with transfers to and from accommodation
- 2, 3 or 4 day self-guided walks with pre-arranged accommodation at various options at walking hubs
- 4-day guided walks with 5 nights – 7 nights accommodation in NPWS accommodation, camping grounds or commercial accommodation in local towns
- Day works could be packaged and promoted as a weekend walking package with 2 nights accommodation.
- These packages can be combined with other soft adventure and marine activities such as canoeing, kayaking, diving, snorkelling, whale watching etc.

For the high value traveller, a commercial operator could seek to become a Great Walk of Australia by offering a suite of experiences based around high quality accommodation on the Great South Coast Walk. This might take the form of an operator using a high-end accommodation establishment as a base for a seamless experience of a series of one day walks on different exceptional parts of the Great South Coast Walk.

In addition, the nature of the trail allows for walkers to start and end each day near local coastal town that can act as a 'walking hubs'. Demand for commercial services such as accommodation, transport, food and walking supplies will increase. As a result, coastal towns will be known as Great South Coast walker friendly towns where service and accommodation providers offer products and packages that cater for needs of walkers such as secure equipment storage, clothes and equipment washing, packed lunches, opening hours convenient to trail users etc.

"Life's an Adventure currently offer some walks on the Great South Coast and have a strong market. We see opportunities to offer itineraries along the coast for our international guests using off track accommodation and packaging different walks under the umbrella of the Great South Coast Walk name

We are excited by the idea and look forward to it becoming a reality"

Mark Norek CEO/owner

Figure 6. Potential Commercial Opportunities



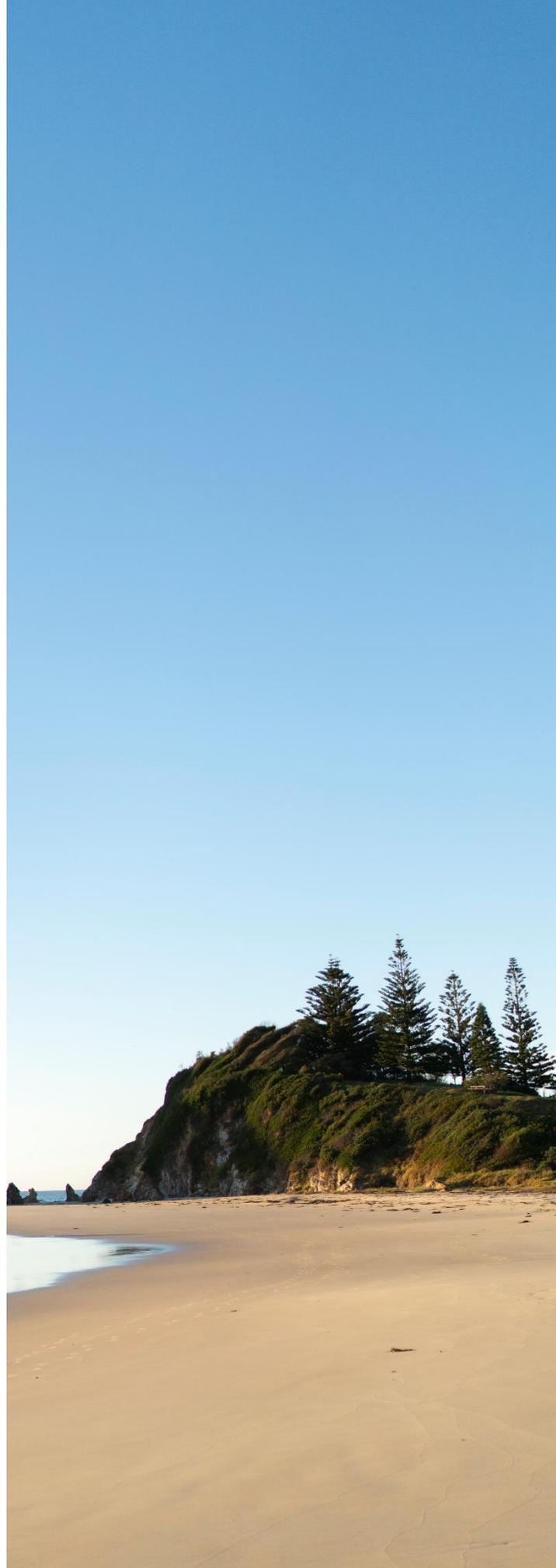


Investment attraction and regional stimulus

Increased visitation and expenditure in the region as a result of the Great South Coast Walk will benefit existing operators and attract further investment from the private sector to develop products and services to meet the needs of visitors. This could include transport, merchandise, accommodation, food and beverages, and guiding services. An increased length of stay for existing markets will improve the occupancy rate of accommodation facilities and may result in investment in new accommodation infrastructure to meet market needs.

Critically, implementing the recommendations will ensure the profile of the South Coast Region is significantly improved as NSW's and Australia's premier coastal walking destination. This is aligned to the State Government's strategic goals for regional development and tourism growth.

There is potential for commercial operators to create products on the South Coast that could be of an appropriate standard and quality to meet Great Walks of Australia criteria if they choose to do so. An example might be an operator selects a walk such as the Light to Light or an operator basing a walking experience in a high-quality exclusive accommodation and selecting some exceptional day walks as a seamless cluster of experiences over 3-4 days along the coast.



Health and lifestyle benefits for the community

Participation in trail activities offers many social, health-related, and cultural benefits to residents and visitors alike. Developing the Great South Coast Walk has the potential to deliver benefits in health and wellbeing for the community, environmental benefits and improvements in facilities for both the local community and visitors. The Great South Coast Walk will benefit these communities by:

- Improving connections between communities
- Encouraging healthy lifestyles
- Creating tourism and economic benefits
- Improving the environmental condition of sections of the coastal zone.

An increased profile for the South Coast region as a result of the Great South Coast Walk is also likely to contribute towards greater regional pride within local communities. Other regional locations in Australia have successfully increased community participation and spirit through similar projects. It could be expected that the project will help to mobilise the local community and provide optimism and energy across the local economy and communities.

Community and Social Benefits

providing opportunities for families and friends to enjoy time together and enhancing quality of life.



Educational Benefits

providing an outdoor classroom for physical activity, sport, nature, culture and history.



Health and Fitness Benefits

improved health and physical well-being for both individuals and communities, reduced health care costs and enhanced productivity.



Economic Benefits

increased tourism revenues, greater business investment and enhanced property values.



Environment Benefits

enhanced environmental awareness, improved understanding of our natural heritage and stewardship of the environment.



Heritage and Cultural Benefits

recognition and respect for Aboriginal culture and historical values.





7. Recommendations

This section identifies the next steps to establishing the Great South Coast Walk and recommends a preferred course of action.

Establishing the Great South Coast Walk to compete with other iconic experiences and Great Walks will require, amongst many other factors, the following critical actions:

- Commitment from stakeholders to work towards the shared vision, branding and marketing strategy and an approach toward signage and other collateral
- Commercial businesses developing and packaging product to support the Great South Coast Walk
- Continued investment in walking track infrastructure that will enable the best experiences with focus on leading walking experiences, support experiences and, thirdly, gaps in the Great South Coast walk.

The following recommendations address each of these issues as the first stage of implementation.

A Shared Vision - Leadership and Co-ordination

In order to establish the Great South Coast Walk, a coordinating body is required. The co-ordinating body will need to work with the Great South Coast partners and operators with a clear understanding of their roles and accountabilities and work together in that framework.

The preferred model is through a co-ordinating agency such as an existing Destination Network to lead the coordination and establishment of the Great South Coast Walk including branding and marketing. The Destination Networks (Southern and Sydney Surrounds South) are well positioned to be the lead agency and could represent all interests across the region and consult with national, state and regional partners.

The lead agency will provide the framework to support the development of Great South Coast Walk offering and assist Councils, land managers and industry by:

- coordinating marketing and promotion
- leveraging investment to support trail development, facilitate accommodation, amenities and trail tourism related business development
- communicating the region's willingness to partner with the private sector on tourism development
- supporting industry development.

Under the proposed model of clustering experiences for consumers, track management and maintenance would remain with the existing land managers.

Securing funding for ongoing route maintenance is widely acknowledged by route managers as the single most difficult aspect of a walking track. Most if not all the funding sources for walking track establishment require commitment to future maintenance but preclude funding for this purpose. The co-ordinating authority can also support the local and state governments in funding bids that assist development of the South Coast as a premium walking destination.

Embedding the concept of the Great South Coast Walk into strategic plans such as the NSW Nature Tourism Strategy that is currently being developed is essential. It is recommended that the concept of the walk be included in the NSW Nature based Tourism Strategy to support the implementation of the strategic priorities in this Plan.

RECOMMENDATION:

Circulate the Opportunity Analysis and seek commitment to work towards the shared vision, branding and marketing strategy for the Great South Coast Walk.

Agree a co-ordinating agency to lead the coordination and establishment of the Great South Coast Walk including branding and marketing.

Establish roles and responsibilities of the co-ordinating agency and stakeholders in the development of the Great South Coast Walk.

Work with state government agencies to embed the concept of the Great South Coast Walk into strategic plans such as the NSW Nature Tourism Strategy and the South Coast Marine Tourism Strategy.

Brand Identity and Marketing

The region can develop consistent content and messaging to promote the Great South Coast *walking experience* that has the pulling power to persuade a visitor to book a trip. The name of the walk is critical in establishing unique identity, inspiring interest and attracting high levels of usage. The name “The Great South Coast Walk” is unlikely to resonate well with consumers and may confuse people given the number of “south coasts” that exist across Australia and the world.

Rebranded however, the cluster of walks from Sydney to the border presents an opportunity to become one of Australia’s iconic walking destinations focusing on a spine that offers a diversity of experiences and additional inland opportunities and a focus for visitors and the community to explore the walking experiences of the South Coast region as well as hinterland experiences such as the Illawarra Escarpment, Deua and Kosciuszko. The brand to be adopted needs to be further researched, but fundamentally the core proposition is marketing the South Coast to leverage those high-quality experiences that are already in the marketplace and recognised. The

concept needs to be clearly positioned in the marketplace and aimed at creating a compelling proposition and leveraging latent demand for several target markets. An opportunity may also exist for sub brands such as promotion of a series of Great South Coast short walks.

Once there is agreement for the brand strategy and approach to positioning the south coast as Australia’s premium coastal walking destination, resources will need to be committed to the creative execution of collateral including signage etc.

Initial thinking is that the South Coast could be positioned along the following lines:

When you’re on the edge of the world’s largest Island you can choose to walk a little, or walk a little longer...your journey, your time, your adventure. Experience the magnificence of the South Coast of NSW

The success of the Great South Coast Walk to attract sustained levels of use depends on effective marketing. A marketing strategy focussing specifically on creating consistent content and messages is required with the aim of increasing volume and length of stay of visitors to the region. It will need to be based on a partnership approach that will tap into existing marketing strategies, channels to market, and programs undertaken by each of the agencies.

There is a range of marketing activities that Destination NSW, local governments, the Destination Networks, land managers and commercial operators can conduct in partnership or at an individual organisational level to promote the trail experiences for visitors to the region. Current trail marketing activities would strongly benefit from central coordination as there are significant risks if consolidated efforts and stakeholder partnering does not occur.

Marketing co-ordination should be undertaken by the central body co-ordinating the development of the Great South Coast Walk in partnership with the local governments, commercial operators and land managers.

RECOMMENDATION:

Confirm the name of the walk and develop a brand strategy in consultation with stakeholders.

Develop a marketing strategy to support the brand with appropriate messages for target audiences developed in partnership with stakeholders. The strategy should aim to:

- deliver communication messages that are consistent, appealing, relevant and useful to target markets
- update existing content to reflect messages about walking experiences
- support future development of marketing materials by providing trail-based content free of charge to operators promoting the region
- support promotion of the region through various online and social media platforms by providing resources to operators about online engagement
- establish an evaluation framework to measure and report on results of marketing strategy
- educate the local community about leading and supporting trails to increase local use to improve health outcomes for the community and engagement of volunteers to assist with maintenance of the trails
- provide incentives and resources to support individual operators in promoting the region.

Commercial Opportunities

There is a range of adventure tourism experiences on offer throughout the region. However, there are limited tourism operators and packages that bring together the entire experience and make it easy for the visitors to plan and book when compared to other walking destinations. This can potentially be a barrier to visitation to the region, as experience and pricing packaging in other destinations make them appear more appealing to walking visitors.

Partnerships with the tourism industry are essential for the success of Great South Coast Walk and promised experience. Industry partnerships are needed for the delivery of linked experience products, accommodation and services. Effective partnerships and collaboration with developing the experience will assist in providing a world class trail experience, sustainable use of the region's outstanding features and the creation of regional employment and economic opportunities.

The Great South Coast Walk offers scope for the development of a range of enterprises and services such as

- Cafes and restaurants and other refreshment outlets along the walk
- Packaged picnic delivery service
- Walking supplies e.g. maps, map cases, clothing, repellent, blister treatment.
- Baggage transfer
- Packaged tours offering a centralised booking service including water crossing(s), accommodation, baggage transfer, return transport, maps and guides
- Great South Coast Walk specific merchandise e.g. t-shirts, sweatshirts, hats, completion certificates
- Great South Coast Walk guide production
- Marine adventure activities – canoeing, kayaking, diving, snorkelling, whale watching etc
- Accommodation.

Some commercial operators may require a licence to provide these services as required by NPWS under Eco Pass licensing system.

It is becoming more prevalent for destinations to develop 'friendly' schemes where service and accommodation providers offer products and packages that cater for needs of walkers such as secure equipment storage, clothes and equipment washing, packed lunches, opening hours convenient to trail users etc.

A commercial operator could seek to become a Great Walk of Australia by offering a suite of experiences based around high quality accommodation on the Great South Coast Walk. While it would be very difficult for the entire Great South Coast Walk to become a 'Great Walk of Australia', there are segments of the walk that could develop into an exclusive experience. This might take the form of an operator using a high-end accommodation establishment as a base for a seamless experience of a series of one day walks on different exceptional parts of the Great South Coast Walk. This should be encouraged.

RECOMMENDATION:

Work with stakeholders to facilitate the development of existing and new commercial opportunities within the region that will support the Great South Coast Walk.

Establish a 'walk friendly' town initiative to assist in growing yield and allowing easy access and dispersal of visitors to walking product.

Central Information / Booking Portal

Consumers can access various levels of information about the walking experiences on offer throughout the region, but there is a lack consistency and presentation of a compelling point of difference in the message across these information sources. For example, NPWS, tourism organisations, local councils, commercial tour operators and accommodation booking sites all have websites promoting the region and the walking opportunities within it. This is not uncommon for a destination, but it can provide a confusing landscape for potential visitors and a barrier to selection of the destination.

Providing trail users with the information on the range of services available to support and enjoy their trail experience and providing options to book online are critical. The most common platform is a website that assists in providing a seamless experience where the logistics of accessing trails, transporting people and equipment, and finding a place to stay are easily handled.

RECOMMENDATION:

Work with partners to develop a centralised information and booking system for the Great South Coast Walk as part of the marketing strategy.

Continued investment

Continued investment in walking track infrastructure will be required to address the gaps in the trail infrastructure of the leading and supporting walks to ensure the Great South Coast becomes a seamless walking experience for visitors.

RECOMMENDATION:

Develop an investment strategy for the co-ordinated development of walking tracks and associated linkages that support the development of the Great South Coast Walk as a continual trail from Sydney to the NSW border.

Measurable objectives and evaluation

For the Great South Coast Walk to be successful and attract support and funding from all levels of government, it is important that an evaluation framework is put in place to measure results and return on investment.

RECOMMENDATION:

Establish and implement an evaluation framework to measure results of the Great South Coast Walk concept and value creation for local communities, regional and state economies.

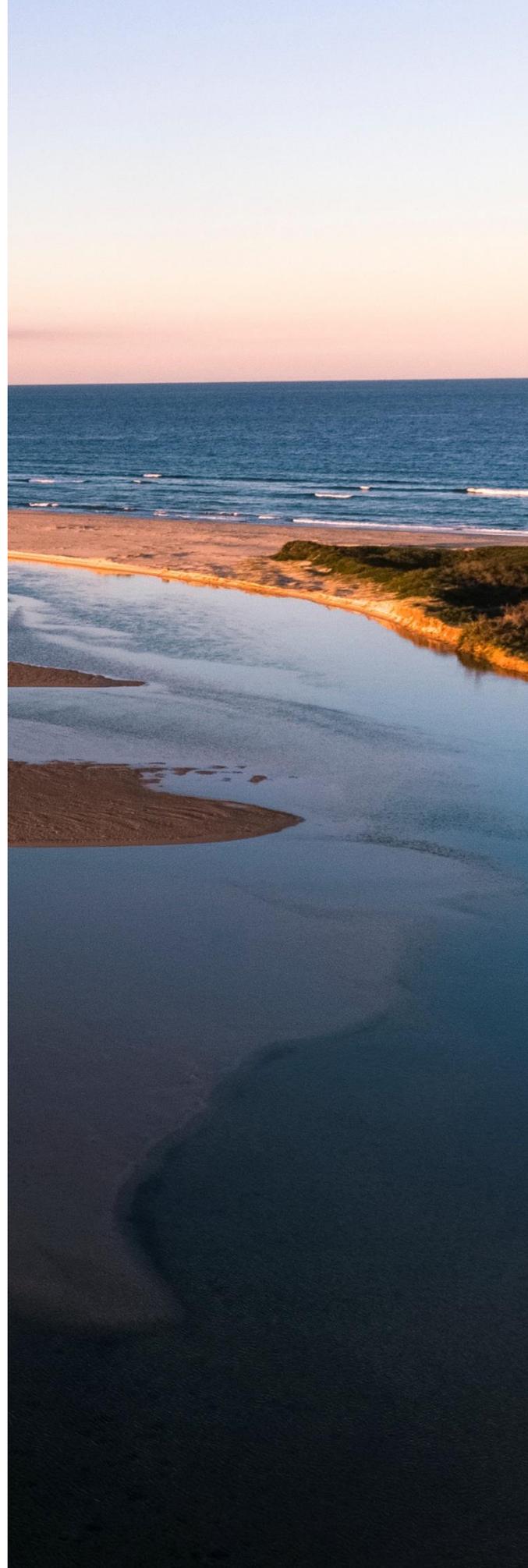




Image Credit: Jordan Robins

8. Conclusion

The NSW Governments state-wide and tourism and regional development strategies identify the need to strengthen the trail network in NSW and the South Coast Region, leverage funding and business investment and strengthen approaches to marketing.

Targeted walking track investment and strengthening the strategic marketing effort is critical to the growth of the region as a tourism destination. The Great South Coast Walk presents a significant opportunity to leverage the investment currently being made by the NSW Government to stimulate regional dispersal and extend the benefit of this investment across the region to all local government areas and their communities.

The region's existing walking experiences are strong enough that if they are collectively presented to the market, they have the pulling power to position the NSW South Coast as Australia's premium coastal walking destination. The Great South Coast Walk brand presents this collective opportunity and will define the destination, its place, its people and stories and provide a focus for marketing. It will deliver on the vision for the State and its economic development strategies. It will encourage low season, mid-week and repeat visitation and increase yield.

Factors likely to positively influence the success of the Great South Coast Walk are:

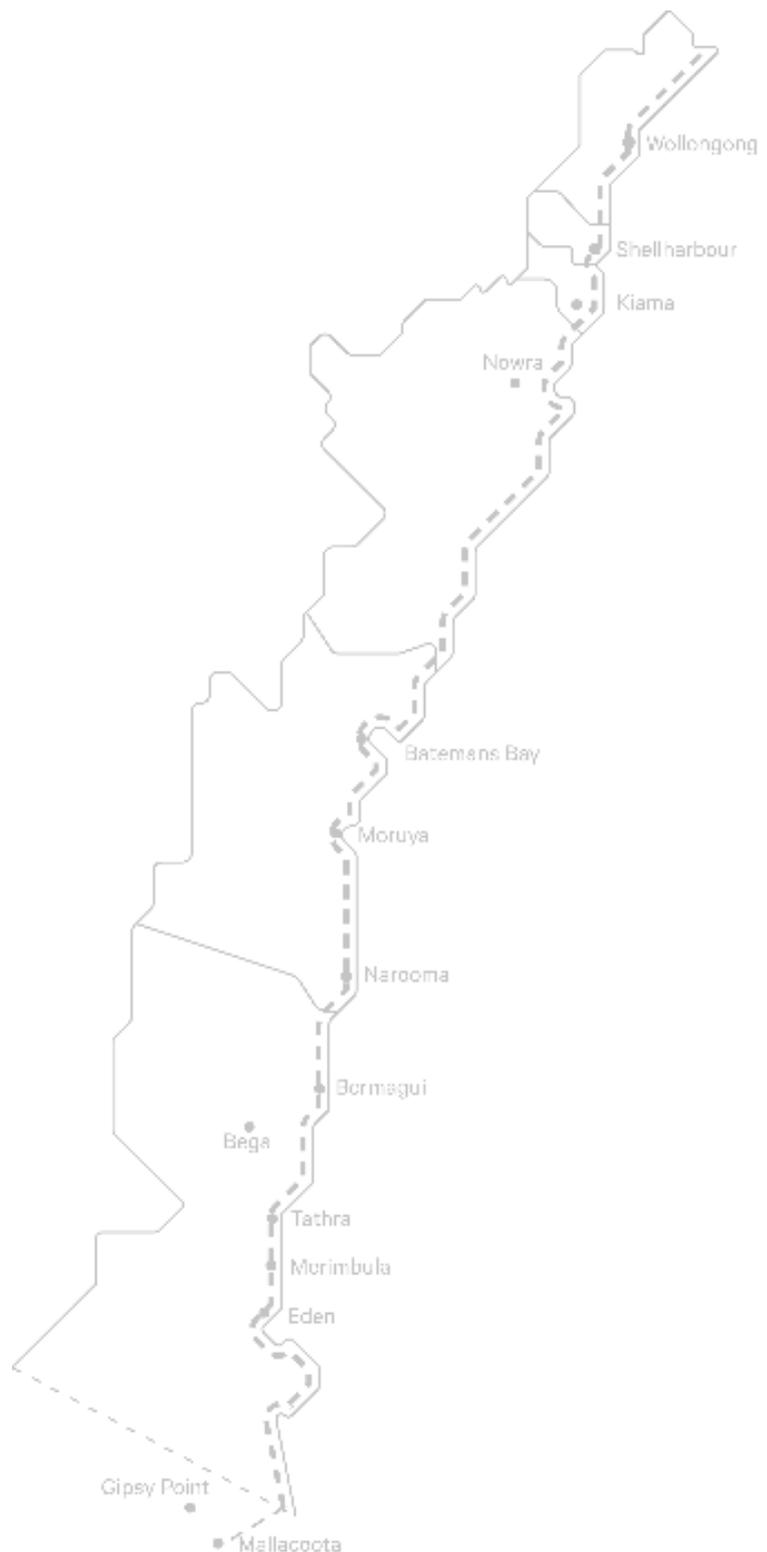
- Length of route achievable within short break, or in sections
- Numerous cultural, historic and natural features of interest
- Stunning and varied scenery, with a variety of terrain
- Significant wildlife, marine viewing and geological interest
- High level of walking interest amongst existing visitors to the south coast
- Extensive sections serviced by local towns and villages
- Opportunities for sense of coastal wilderness
- Proximity to major source markets of Sydney and Canberra
- Public transport to the commencement of the track and within 2 hours of Sydney
- High visitor levels to Royal National Park and other National Parks with potential to raise route profile
- Interest from commercial operators
- Strong visitation and existing tourism markets
- Aboriginal culture and tourism product including including Munyunga Waraga Dhugan – Wreck Bay, Bingi Dreaming track, Bundian Way, Coomee Nulunga Cultural Trail, and Ngaran Ngaran Culture Awareness tour.

The short- and medium-term benefits arising from the Great South Coast Walk are:

- an increase half a million visitors generating \$40 million in additional expenditure over the next 10 years
- creation of demand for services throughout the region as a result of this growth
- employment growth in the tourism, accommodation and services sectors indirectly related to the Great South Coast
- regional investment in tourism businesses
- complementary benefits for regional communities such as active transport, recreation, health, social and cultural experiences
- diversification of the state and region’s tourism product mix
- international awareness of the South Coast’s walking opportunities through branding and marketing
- creation of greater community, government and business engagement around trail management.

Longer term benefits will include:

- increased employment and economic development opportunities for the region
- increased employment and economic development opportunities for the state economy
- enhanced reputation for the region and state as a premier coastal walking destination.





APPENDIX A – STAKEHOLDER CONSULTATION

State Agencies, Local Government, Commercial Operators and Other Stakeholders

- Department of Premier & Cabinet
- NSW National Parks and Wildlife Service
- Illawarra Branch of National Parks Association
- Milton Branch of National Parks Association
- National Trust Far South Coast and Bermagui Community Forum
- Dalmeny-Narooma Bushwalking Club
- Shoalhaven Walking Network
- Batemans Bay Chamber of Commerce
- Shoalhaven Business Chamber
- Moruya Business Chamber
- Tuross Head Business Owners Association
- Bermagui Chamber of Commerce and Tourism
- Merimbula Chamber of Commerce
- Milton Ulladulla Business Chamber
- Kiama Business Chamber
- Eden Chamber of Commerce
- Tathra Beach and District Chamber of Commerce Incorporated
- Destination Wollongong
- Kiama Shire Council
- Shoalhaven City Council
- Shellharbour City Council
- Wollongong City Council
- Eurobodalla Shire Council
- Bega Valley Shire Council
- Destination Wollongong
- Kiama Tourism Advisory Board
- Sapphire Coast Destination Marketing
- Illawarra Shoalhaven Joint Organisation
- Destination Sydney Surrounds South
- Destination Southern NSW
- Destination NSW
- Great South Coast Walk - Founder/Creator
- Region X
- Illawarra Walks
- Into The Wild Nature Tours Australia
- Nature Engagement Tours
- Jervis Bay Walks
- Australia-Naturally Travel
- Bush Safaris
- Shoalhaven Tours
- Auswalk
- Parktrek
- Trek Tours Australia
- Australian Walking Holidays
- Lifes An Adventure
- Light to Light Walks
- Kiah Wilderness Tours
- Southbound Escapes
- Eurobodalla Nature Based Tourism Consultant
- NSW Aboriginal Tourism Operators Council
- Barefoot Downunder

APPENDIX B – COASTAL WALKING TRACKS CURRENTLY PROMOTED BY EACH LGA AND NPWS ON THE SOUTH COAST

Agency / Local Government	Name of Walk	Duration (one way)
NPWS - Wollongong	Bundeena Drive to Marley Walk	2.5 hrs return, 8 kms return, grade 2
	The Coast Track (Bundeena and Otford)	2 days, 26 kms, grade 5
	Werrong Beach Track	2.5 hrs return, 4kms return, grade 5
	Sublime Point	0.7 km, 45mins
	Wodi Wodi Track	6.5 kms, 2 hrs
	Curra Moors Loop Track	5 hrs return, 10kms loop, grade 4
NPWS - Shellharbour	Nothing coastal	
NPWS - Kiama	Hare Point Walking Track	3 hrs return, 6kms return, grade 5
NPWS – Shoalhaven	White Sands Walk and Scribbly Gum Track	1.5 hrs return, 2.5km loop, grade 3
NPWS - Eurobodalla	Bingie Dreaming Track	6 hrs, 13.5 kms, grade 3
	Dark Beach Walking Track	30 mins, 500m, grade 3
	Mangrove Walk	45 mins, 1km loop, grade 3
	Minosa Rocks Walking Track	1 hr return, 2kms return, grade 1
	Montague Island Walking Track	1.5km loop, grade medium
NPWS – Shoalhaven	Hyams Beach Trail	1 hr return, 2kms return, grade 5
	Nerindillah Lagoon Walking Track	1 hr, 2.5kms loop, grade 3
	Narrawallee Inlet Walking Track	3.5 hrs, 9kms loop, grade 3
NPWS – Bega	Sandy Creek Loop Track	3 hrs, 6km loop, grade 4
	Pinnacles Loops Walking Track	40 mins, 1km loop, grade 3
	Pambula River Walking Track	40 mins return, 1km return, grade 4
	Haycock Point to Barmouth Beach Walking Track	2.5 hrs, 3kms, grade 3
	Kangarutha Walking Track	4 hrs, 9kms, grade 3
	Wajurda Point Walking Track	500m, grade easy

Wollongong	Bellambi Lagoon and Sandhill Circuit	2 hrs, 5kms, grade easy
	Illawarra Escarpment Traverse	6 hrs, 16.5kms, grade 3-4/6
	Grand Pacific Walk	29 kms, 6 hrs
	Mt Mitchell Lookout, Stanwell Park	2 hrs return, 4kms return, grade medium / hard
	Hill 60 and Surrounds	2.5 hrs return, 6kms return, grade medium
Shellharbour	Bass Point Reserve	3 hrs, 7kms, grade easy
	Killalea State Park – Mystic Beach Track	2 hrs return, 3km return, grade easy to medium
	Killalea State Park – Lagoon Circuit	2 hrs, 4kms, grade easy
Kiama	Kiama Coast Walk. Minnamurra River to Kiama Blowhole	3 hrs, 8.4kms, grade medium
	Kiama Coast Walk. Kiama Blowhole to Loves Bay	1.5 hrs, 5kms, grade medium / hard
	Kiama Coast Walk. Loves Bay to Gerringong	1.5 hrs, 5kms, grade medium / hard
	Werri Beach (along beach) to Gerroa. Northern section of Seven Mile Beach	45 mins
	Seven Mile Beach (sand)	3 hrs, 6kms, grade easy
	Minnamurra to Boneyard Beach	1 hr, 5kms, grade medium
	Boneyard Beach to Blowhole	45 mins, 4kms, grade medium
	Bombo Beach to Blowhole	30 mins, 3kms, grade medium
	Blowhole to Kendalls Beach	20 mins, 2kms, grade medium
	Kendalls Beach to Love Bay	40 mins, 4kms, grade hard
	Loves Bay to Werri Beach Coast Track	2 hrs, 5.5kms, grade hard
	Shoalhaven	Wreck Walk - Abrahams Bosom Reserve
Round the Bay Walk		1 hrs, 5km, grade easy
White Sands Walk		1 hrs, 4km grade easy/medium
Munyunga Waraga Dhugan		2.5 hrs, 5.4km loop, grade medium
Ulladulla Fossil Walks: Gondwana Coast Fossil Walk		2 hrs, 500m, grade easy
Pretty to Pebbly Beach		6 hrs, 16km, circuit, grade medium/hard
Eurobodalla	Broulee Island Reserve Walk	2 hrs, 3.5kms, grade moderate
	Banksia Walk - Burrewarra Point	1.5kms, 50mins grade easy

	Lake Brou to Potato Point	2.5hrs, 8kms, grade medium
	NPWS Mangrove Walk	45mins, 1km loop grade 3
	NPWS Dark Beach walking track	30mins, 0.5kms Grade 3
	NPWS Bingie Dreaming Track	5 hrs, 13.5km Grade 3
Bega Valley (Sapphire Coast Tourism)	Light to Light Walk	3 days, 31kms, grade easy to moderate
	Horse Head Rock	1 hr, 1.5kms grade difficult
	Haycock to Barmouth Beach	2 hrs, 5kms, grade moderate
	Pinnacles Loop Walk	30mins, 1km loop, grade easy
	Kangarutha Walking Track	3 hrs, 6km, grade medium
	Green Cape to Pulpit Rock (or extend to Twofold Bay)	4kms, or extend to 30kms
	Tura Beach Headland	2kms
	Wajurda Point	500m
	Pambula River Walking Track	30 mins, 1.2kms, grade easy

APPENDIX C – RELEVANT PLANNING / MARKETING DOCUMENTS

Relevant Planning / Marketing Documents

Great South Coast Walk

Various planning documents from State and regional tourism plans, through to Local Government Business Plans and tourism strategies have committed towards the investment, development and promotion of trails for recreation, tourism and business development purposes. Relating directly to the Great South Coast Walk are the following:

- NSW State-wide Destination Management Plan which aims to develop and deliver experiences and products strategies in partnership with the Destination Networks, including the development of touring routes and trails.
- Destination Southern NSW Management Plan 2018-2022 highlights the growing trend of international and domestic overnight stays in the region and their desire to participate in cycling, adventure and nature-based activities. Product development and Hero Experience focus on nature-based tourism, cycle experience product development and infrastructure
- Destination Sydney Surrounds South Destination Management Plan 2018-2022 includes the strategy imperatives of developing the Grand Pacific Walkway, Kiama Coastal Walk Extension, Kiama to Southern Highlands Walking Trail and the Great South Coast Walk. It highlights the importance of partnering with Tourism Australia to gain recognition for signature experiences that can be promoted to the international audiences.
- New South Wales South Coast Marine Tourism Strategy 2019 prioritises the development, enhancement and promotion of a network of coastal walks and trails in National Parks along the South Coast.
- Kiama Tourism Opportunities Plan seeks to extend the existing trails from Minnamurra River to Gerringong, a total of 22km. If implemented, by 2024, an additional direct economic value of \$5.43M and \$4.18M8 of indirect benefit could be generated for the Kiama area's economy from 30,319 new visitors and 13,591 nights spent in region.
- Shoalhaven Tourism Master Plan 2016 and the Shoalhaven Destination Management Plan 2018-2023 both promote developing world class experiences to drive more visitation.
- The Wollongong Destination Development Plan 2014 highlights the need to increase visitation, grow capacity and improve the experience offering.
- Eurobodalla Destination Action Plan 2018-2021 aims to position the region as a nature-based tourism destination with a focus on experience development.
- All LGAs have Economic Development Strategies that highlight that enhancing visitor experiences is a critical factor for local economy, along with building shoulder seasons to promote economic growth.

State		Relevance
NSW Statewide Destination Management Plan	Development of touring routes and trails. Tourism infrastructure and access improvement strategies.	High
NSW Visitor Experience Industry Action Plan 2030	The NSW visitor economy will more than triple 2009 overnight visitor expenditure to 2030, by aiming to achieve: \$45 billion by 2025 \$55 billion by 2030.	High
New South Wales South Coast Marine Tourism Strategy 2019	Identifying infrastructure upgrades required to enhance the touring experience, including improving accessibility, lookouts, parking, signage, telecommunications and interactive technologies. Prioritise the development, enhancement and promotion of a network of coastal walks and trails in National Parks along the South Coast.	High
Sydney to Melbourne Touring	Includes the LGAs of Eurobodalla, Shoalhaven, Sapphire Coast (Bega)	High
NSW Cruise Development Plan 2018 (develop tourism product)	Eden Port	Med
Regional		
Destination Southern NSW Management Plan 2018-2022	Product development and Hero Experience focus on nature based tourism, cycle experience product development and infrastructure. Improving visitor access and flows throughout the region, via improved connectivity in road infrastructure and mobile/wifi connectivity across the region. Three priority Rail Trails. Walks and associated visitor infrastructure.	High
Destination Sydney Surrounds South Destination Management Plan 2018-2022	Vision - be the #1 overnight short break destination for our target markets.	High

Local Government: Shellharbour City Council		
Community Strategic Plan 2018 - 2028	Attract visitors, promote and protect	High
Economic Development Strategy 2014 – 2018	Increase visitors to help community grow, jobs focus	High
Coastal Zone Management Plan 2018	Supporting recreational uses, beach erosion, improving public access.	High

Local Government: Kiama Municipal Council		
Kiama Tourism Opportunities Plan 2018	Hero Experiences: Iconic Coastal Walk and Adventure parks and trails Activate Walking and Trail Experiences	High
Community Strategic Plan 2017-2027	Economic growth and continued support of tourism	High
Kiama Regional Economic Development Strategy 2018-2022	Focus on shoulder season and employment ops	High

Local Government: Bega Valley Shire Council		
Economic Development Strategy 2016-2021	Enhance visitor experiences, critical factor for local economy	High
Sapphire Coast Tourism Destination Marketing 2019-2020	Focus on experience development, and year round tourism	High

Local Government: Shoalhaven City Council		
Shoalhaven Tourism Master Plan 2016	World class experiences, lobby for development to drive visitation	High
Shoalhaven Destination Management Plan 2018-2023	Moist visited LGA (outside of Sydney CBD), key industry	High
Shoalhaven Economic Development Strategy 2019-2026	Build shoulder seasons	High

Local Government: Wollongong City Council		
Economic Development Strategy 2019-29	Attract major events and tourism infrastructure	High
Wollongong Destination Development Plan 2014	Increase visitation, grow capacity and improve experiences	High
Community Strategic Plan 2018-2028	Build tourism, conference and events	Med
Grand Pacific Walk Master Plan, City of Wollongong 2013	The vision of the Grand Pacific Walk project is to create a safe route for both pedestrians and cyclists for the entire 60 km length	High
Illawarra Escarpment Management Plan 2018	In order to undertake overnight walks along the length of the Escarpment, it would be desirable to have two camping sites approximately one day's walk apart. A clearing along the Gibson Track at Austinmer (Austinmer Camp) is currently available for walk-in camping.	High

Local Government: Eurobodalla Shire Council		
Eurobodalla Destination Action Plan 2018-2021	Experience development, position as a nature based tourism destination	High
Economic Development Strategy 2019-28	Tourism is driving force of economy	High

APPENDIX D – EXISTING AND PROPOSED INVESTMENT IN WALKING TRACK INFRASTRUCTURE

Agency	Track	Walking Track Priorities	Proposed Investment
NPWS	Royal Coast Track	Ongoing upgrade of trail infrastructure Diversification of accommodation options	Construction underway
	Murramarang	Murramarang South Coast Walk (NPWS)	\$3.6 million – construction underway
	Light to Light	Upgrade and realign sections of the current track and provide overnight accommodation at 3 sites	\$8 million - construction underway
Wollongong Council	Grand Pacific Walk	Stage 1 complete \$5 million Stage 2 underway > \$6 million	Filling in the missing links south from Clifton towards Austinmer. This will complete a formed footpath from Stanwell Park to Austinmer. Funding to complete a significant amount of the work has been allocated to the project.
Shellharbour	Shell Harbour to Lake Illawarra Aboriginal Interpret Ban Point Indigenous Culture Trail Killalea S.P. (Reflection) Killalea – Bass point	Planning underway	Funding sought \$6.5 million park upgrade
Kiama	Kiama Coastal Path – Hero experience in Kiama Tourism Opportunities Plan Minnamurra Boardwalk	The extension of the Coastal Walk from Gerringong to Gerroa - 4.1km Gerringong Potential economic impact - > \$2m in additional expenditure per annum Planning underway	Council has only considered undertaking the preliminary survey work to see if the extension of the Coastal Walk to Gerroa is feasible/possible. \$9 million investment
Shoalhaven	Shoalhaven to Murramarang South Coast Walk	Starts/ends Bawley Point which is in Shoalhaven	Part of \$3.6 million – construction underway
	Ulladulla Coastal Walk	Upgrade and connect the two headlands Ulladulla Headland and Warden Headland	\$6.8 million in grant funding sought

Agency	Track	Walking Track Priorities	Proposed Investment
Eurobodalla	Precinct (planning for beach precinct underway)	Murramarang Trail head – Maloney’s Beach	Part of \$3.6 million – construction underway
	Coastal Headlands Walking Trail - Batemans Bay to Mackenzie’s Beach	Planning underway	Funding sought
Bega	Bundian Way	Planning underway	Funding sought
	Kangaruitha to Tathra to Bermagui	Planning underway	Funding sought
	Wallaga Lake		
	Light to Light	Upgrade and realign sections of the current track and provide overnight accommodation at 3 sites	Underway

APPENDIX E – CASE STUDIES

Te Araroa The Long Path, New Zealand



Snapshot

The 3000km route stretching from Cape Reinga in the North of New Zealand to Bluff in the South was officially opened December 3rd, 2011 - taking in spectacular New Zealand landscapes from beaches to volcanoes to forests to cities. The whole route normally takes 50-80 days per island (4 months).

Te Araroa's trails connect with Department of Conservation tracks, Council paths and beach walks to collectively form New Zealand's national walking trail.

During the 2018-2019 walking season (October-April) the number of people walking the entire length of the trail exceeded 1,100 for the first time. Hundreds of thousands more walked individual sections.

Marketing

Marketing efforts highlight that Te Araroa can be enjoyed as a fantastic day walk or as a series of multiday walks. The walk connects settlements, townships and cities. It's a corridor that encourages social and economic transactions en route – for marae stays and other cultural experiences, also food and accommodation. The track corridor showcases a wide variety of New Zealand experiences - natural, cultural, and historic.

The main website highlights the top 6 day walks and the top 6 multi-day walks. Online walkers can order the official Finishers Medal and the official Guidebook. Local business can register online as an accommodation provider.

In 2019 six of the Te Araroa trail's most spectacular and scenic locations were immortalised in a new series of postage stamps released by NZ Post.

Governance

Te Araroa Trust (TAT) is the guardian of the trail, responsible for developing, promoting and managing it.

The Trust relies on donations and grants to operate, and they encourage walkers to donate online e.g. they suggest a donation of NZ\$500pp for those walking the length of Te Araroa, NZ\$250 for those walking one island only and smaller amounts for more specific tracks/distances.

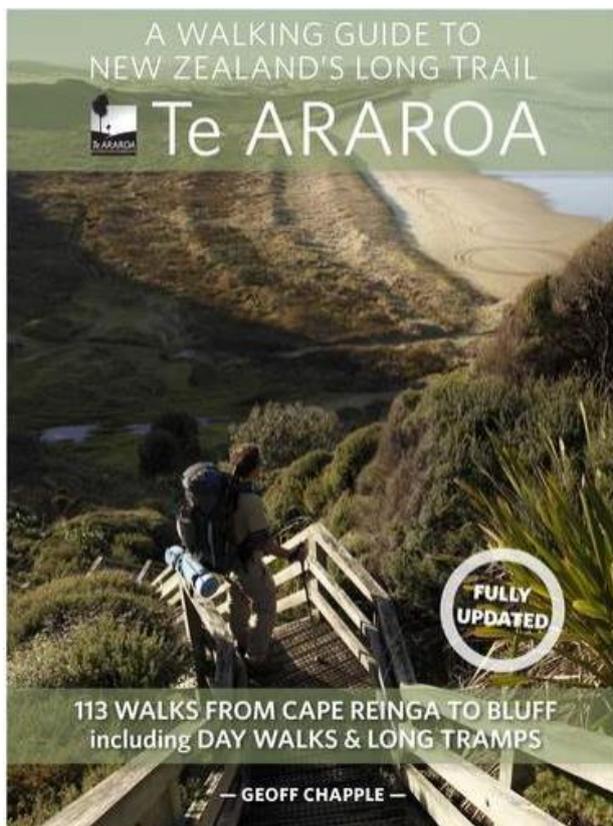
TAT and its eight regional trusts state that they have achieved what the official bodies could not. For years their organisation has had a hard battle for funds, and survival, and lately their success, is due to the many volunteers who have kept the dream alive and advancing.

The trust encourages walkers to register online, so they can track numbers.

Issues

Weakness identified by the TAT:

- No accurate data on the number of annual through and sectional walkers
- Lack of resources - \$ and staffing
- Infrastructure is at seasonal capacity
- Trail fragility – maintenance and land-use agreements
- Relationship with DoC - inconsistent Too few Regional Trusts – we require them each region
- Vision - lacks clarity
- Lack of recognition of the TAT by NZ Government compared to the NZ Cycle Trail
- Lack of champions



Maintenance

TAT are dependent on the support of their donors, sponsors and partners- agencies such as the Department of Conservation, New Zealand Transport Agency and New Zealand Walking Access Commission. Otherwise maintaining and sustaining the trail for the walking public to enjoy would not be possible. Unlike some NZ Trails Te Araroa does not get ongoing direct funding from Government.

The TAT will focus on the following over the next 3 years:

- Reduce road walking, improve amenities including accommodation, reduce critical hazards – including water crossing

Sustainability

- There is a need to plan and secure income streams.
- Generate income from government, corporate, philanthropic and community supporters, including walkers.
- Encourage local communities to participate in economic development from embracing Te Araroa.
- Work alongside a large and highly valued community of well-connected volunteers and stakeholders.
- Ensure clearly defined structures, roles, responsibilities, recognition at all levels.

Sources:

- www.teararoa.org.nz/faq/
- www.ausleisure.com.au/news/te-araroa-trail-celebrated-in-new-zealand-postage-stamp-series/

The East Coast Trail



East Coast Trail Newfoundland, Canada

Snapshot

The East Coast Trail, a 300 km footpath along the meandering coastline of Newfoundland's Avalon Peninsula, passing through 30 coastal communities. Split into 26 separate paths, each trail has distinctive topography, history, and surprises – colourful fishing villages, fjords, lighthouses, ecological areas, icebergs, a suspension bridge, and the first sunrise in North America.

There are over 14,000 visitors completing over 65,000 hikes a year on the trail.

Non-resident hikers contribute over \$3.5 million annually to the local communities along the trail, with tourism a critical revenue source.

Governance

The East Coast Trail on Newfoundland's Avalon Peninsula is managed by the East Coast Trail Association. (ECTA)

The ECTA is a registered charity established to provide a wilderness hiking experience by developing and maintaining the East Coast Trail, promoting public access, minimizing its impact on the natural environment and protecting it for future generations. The long term sustainability of the trail is not a challenge that can be solved by the East Coast Trail Association alone. The trail covers private land and public land. Ensuring its sustainability is a complex and demanding legal challenge for a small charitable organization. The association has membership levels starting at \$25 and asks for donations.

Investments by the Government of Canada and the Government of Newfoundland and Labrador (\$1.2million) in the East Coast Trail Association (ECTA) will help to further support trail upgrades and generate 60 weeks of employment for 18 trail crew.

Issues

The ECTA have identified five strategic challenges that are critical to long-term success: communications, funding, trail management, volunteerism and governance. The effective resolution of these challenges is conditional on the engagement and active involvement of stakeholders in the management of the trail.

Marketing and Communications

Two critical goals for the East Coast Trail are funding to sustain the trail and delivery on its mandate and mission. Not-for-profit, charitable organizations like the East Coast Trail cannot accomplish their missions effectively or attract funding and resources without the support and commitment of many stakeholders. Marketing and communications provide a road map and tools to develop and build that engagement, support and commitment.

The issue cited most often in the membership survey, volunteer focus groups and other stakeholder consultations was the need for improved, regular and sustained communications and marketing efforts. Members value engagement and information about the trail and the work of the association and its board.

Financial Resources for Long-Term Sustainability

Like many other charitable, not-for-profit organizations, the East Coast Trail Association is struggling to find the financial resources required to carry out its mission. The Trail has a reputation for an outstanding coastal hiking trail and received international recognition as one of the 10 best adventure destinations in the world. The trail is now a critical aspect of the province's tourism infrastructure.

However, the current funding model cannot sustain the existing 265 km of developed paths from Cape St. Francis to Cappahayden. They need to secure funding for the long term in order to ensure that the ongoing management and operation of the trail remains financially sustainable.

Maintenance, Enhancement and Protection

It is vital, though increasingly difficult, to keep pace with the current demand to meet hiker expectations and keep the trail in a safe condition. Extreme weather events erode coastline paths and knock down thousands of trees that need clearing each year. Ensuring that the trail and its environment are protected is critical to maintaining the trail's wilderness hiking experience for tourists and residents alike.

Volunteerism

Volunteers give stamina to the East Coast Trail Association. They develop policies and standards, monitor trail conditions, plan trail operations, slash brush, edit newsletters, update the website, monitor social media accounts, publish maps and guidebooks, lead guided hikes, raise funds, support administration, advocate in municipal land-use planning, provide legal guidance, attend public events, give direction, participate in committees and promote the association in numerous ways. Volunteers are passionate friends of the trail and are essential to its success.

Governance and Structure

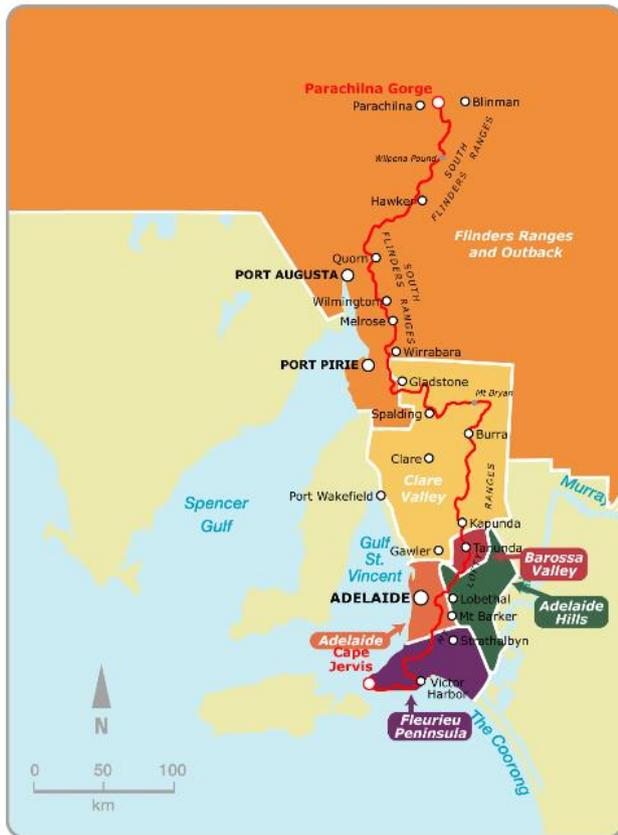
The association is based on a governance structure that was implemented in 1994. Though enhanced over the years, challenges remain. The trail maintenance program is struggling to meet the demands of a 265-km trail; the work demands placed on our core volunteer committees cannot be supported over the long term.

Changes to governance are required to manage these challenges effectively and to sustain the trail. An improved governance model will include policies, decision-making processes, systems and organizational structures that enhance the support needed to manage the association.

Sources:

- www.macsadventure.com/holiday-2421/hiking-newfoundlands-east-coast-trail#
- www.eastcoasttrail.com/en/choose-your-path/points-of-interest.aspx
- www.newfoundlandlabrador.com/things-to-do/hiking-and-walking
- www.canada.ca/en/atlantic-canada-opportunities/news/2017/05/east_coast_trailassociationreceivesgovernmentfunding.html
- www.ectthruhike.com/

The Heysen Trail South Australia



Snapshot

The Heysen Trail is a long distance walking trail in South Australia. It runs from Parachilna Gorge, in the Flinders Ranges via the Adelaide Hills to Cape Jervis on the Fleurieu Peninsula and is approximately 1,200 kilometres in length. Open April to October each year

The Trail passes through:

- National Parks, Conservation Parks and Reserves
- Public roads and road reserves (unmade roads) through local council areas
- Private land
- Forests

Governance

The Trail is managed and maintained by a partnership between:

- the volunteers of the Friends of the Heysen Trail
- the Department for Environment & Water (DEW)
- a number of volunteer walking clubs, landholders and individuals.

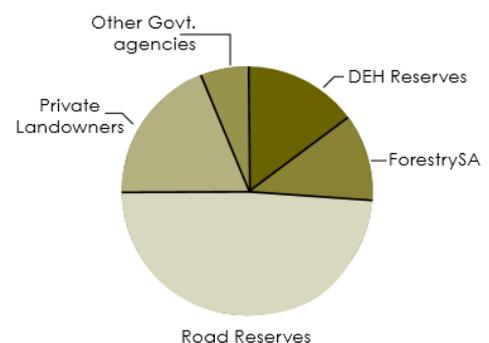
The Friends of the Heysen Trail is a volunteer organisation dedicated to the promotion and maintenance of the Heysen Trail. Online, there is an extensive list of members of the group, online shop selling maps and clothing, online articles and updates. The objectives of the group are:

- to promote public awareness and usage of the Heysen Trail and other walking trails in South Australia
- to assist and advise in the development and maintenance of walking trails in South Australia
- to ensure the rights and interests of recreational walkers are preserved and that access to walking trails and other walking areas are protected
- to promote awareness of environmental responsibilities on and adjacent to walking trails
- to make representations and submissions to appropriate Government, semi-Government and non Government organisations on any matters concerning recreational walkers and walking trails

Government

In the June 2019 State (SA) Budget \$6m was allocated for enhancements to the Heysen Trail and Deep Creek Conservation Park over the next three to four years.

Heysen Trail Land Tenure



Maintenance

The organisation depends on walkers for information and comments on the condition of and safety concerns along the trail. The trail is broken down into sections, and each section has an identified leader who is responsible for that area, example:

Issues

Promoting the Trail

- Developing and implementing a marketing plan
- Incorporating the trail into state, national and international tourism promotions and publications

Broaden the Variety of Experiences available on the Trail to Encourage Increased use by a Wider Range of People

- Developing strategic sections of the trail
- Developing trail links to nearby towns; encourage tourism operators to develop packages providing accommodation and transfers

Ensure a High Standard of Trail Management

- Developing a management plan that addresses route, standards and facilities
- Developing annual operating plans for maintenance
- Enhancing interpretation of Aboriginal and European culture

Increase the Support Base

- Strengthening partnerships between land owners, the Friends of the Heysen Trail and Parks
- Improving engagement with Local and State Governments
- Exploring options for a high level stakeholder group to guide management of the trail

Pursue Resources for Development, Management and Promotion

- Expanding the range of funding sources for priority works

Sources:

- <https://heysentrail.asn.au/heysen-trail/>
- www.environment.sa.gov.au/files/sharedassets/parks/heysentrail_plan

Queenstown Trails, New Zealand

Queenstown Trails are a successful example of visionary planning to respond to changing trends and extend the trails offering. TRC's work in planning for this trails network is a benchmark in ongoing planning and adaptive management of a major trails network.

An initial strategy was developed in 2004 to guide development of a world-class 190+ km network of walking, hiking and biking trails across multiple tenures in the iconic nature-based and adventure destination of Queenstown. This trail network became an important local and tourism asset, with 90% of the plan having been implemented.

In 2015, a new strategic plan to guide the next 10-year phase of trail development and management was developed. In close consultation with trail stakeholders and community, outcomes of the first strategy and changes affecting use of the trails were analysed, and a vision and performance target were agreed.

The new plan consolidated work completed to-date and looked to respond to new opportunities not foreseen 10 years before. It also provided a solid footing for further growth in the trail use across the region and addressed the need to complete trail linkages for local resident and visitor use; strategies to improve trail experience delivery; ways to promote increased use and community stewardship of trails; improved information gathering; and sources of sustainable funding for trails development and management.

A survey of Queenstown Mountain Bike Club members and trail users in 2016/17 indicated a range of economic impacts resulting directly from the Queenstown Mountain Bike trails:

- Mountain bike trail users were estimated to spend \$64 million per year in the Queenstown region. This spending covered bike related expenses, food

and beverage, other retail spending, other adventure tourism spending and for overnight visitors, spending on accommodation.

- The trails generate a total of \$25 million in income for the Queenstown region annually.
- The operation of the trails and the users are estimated to generate a total of 335 FTE jobs in the region (both direct and indirect).¹³

The Queenstown Trails are undeniably a part of the success of the tourism industry in Queenstown, with visitation growth and spending at record levels. Queenstown was the South Island's number one visitor destination in 2018.¹⁴

The Queenstown Trails Trust Trail Count Report dated 3rd April 2017 reported that there have been 'a total 1,294,144 trail journeys and 5,758,941 total trail movements (clicks) since opening in October 2012, this includes 114,982 journeys so far in 2017, compared to 109,538 in the same period in 2016, a 5% increase year on year so far.'

In late 2018, Google mapped 120 km of the trail to bring the trails into the digital age and publish the hiking and cycling tracks online.

Further expansions to link the resort's outer suburbs are planned in 2019, with the first stage of building works expected to start by the end of the year.

Queenstown Trails are also currently part of a new project, which will connect 4 existing Great Rides and link 30 communities along a 530 km continuous cycle trail network across Otago. The Government has committed over \$13 million in funding for this proposed extension, which will be matched by local funding.

¹³ Review of Economic Impact of Queenstown Mountain Bike Trails Draft Report May 2017

¹⁴ Radio NZ Article 28th January 2019 <https://www.radionz.co.nz/news/national/381129/queenstown-remains-top-south-island-destination>

Great Ocean Walk, Victoria

The Great Ocean Walk is Victoria's premier long distance walk. It stretches approximately 104 kilometres along the south-west coast and traverses the coastline and forest from Apollo Bay to the iconic Twelve Apostles, Port Campbell National Park.

The trail offers walkers the option of short walks to day hikes and longer 7 night/8 day camping experiences. The proximity to local towns also allows for visitors to stay in 'o-walk' accommodation and enjoy a variety of independent or packaged services, such as tours, guides, transport providers, food and wine.

Most of the Great Ocean Walk sections could be classified as suitable for most ages and fitness levels, with some bush walking experience recommended. The sections of the Great Ocean Walk can be broken up by campsite stops.

- Section 1 – Apollo Bay Visitor Information Centre to Elliot Ridge Campsite = 10.3km.
- Section 2 – Elliott Ridge Campsite to Blanket Bay Campsite = 13.3km.
- Section 3 – Blanket Bay Campsite to Cape Otway Campsite = 11.4km.
- Section 4 – Cape Otway Campsite to Aire River Campsite = 9.8km.
- Section 5 – Aire River Campsite to Johanna Beach Campsite = 15.3km.
- Section 6 – Johanna Beach Campsite to Ryans Den Campsite = 14.8km.
- Section 7 – Ryans Den Campsite to Devils Kitchen Campsite = 15.3km.
- Section 8 – Devils Kitchen Campsite to Great Ocean Road information bay adjacent to Glenample Homestead = 14.1km.



Self-guided walkers can choose to have accommodation arranged or to use the campsites along the route. Each campsite has 8 individual camp 'pads' set into the surrounding bushland which can accommodate a 2-3 person tent. Registration fees apply at these campsites and hikers must book at least 2 weeks in advance.

Part of the appeal of the walk is that it is accessible to everyone, from visitors that want to carry their own equipment and walk independently, to those who wish to only carry a daypack and enjoy a more luxurious transfer and accommodation hosted option.

There are no trail fees to walk the Great Ocean Walk.

Opened in January 2006, the Great Ocean Walk displayed signs of immediate economic benefits. The Victoria's Trails Strategy 2013-2023 stated that the Great Ocean Walk involved 'more than 40 marketing partners; and in 2009, the Walk provided an estimated annual impact of \$15 million (including marketing, visitor expenditure and flow-on expenditure) and more than 100 full-time jobs.'





Ride High Country North East, Victoria

Snapshot

Tourism North East (TNE) is one of eleven regional tourism boards established at the directive of Tourism Victoria (now Visit Victoria), the State tourism body. This region includes six shires – Alpine, Benalla, Indigo, Mansfield, Towong and Wangaratta – and the three major alpine resorts of Falls Creek, Mt Buller and Mt Hotham.

Marketing

The Ride High Country brand was developed to unite the 12 cycling destinations in North East Victoria, to leverage and grow its cycle tourism strengths of: rail trails, mountain biking, road cycling and gravel riding.

TNE has taken the High-Country master brand and leveraged its favourable associations to develop targeted pillar brands. These three brands are currently in market, supported by integrated marketing programs:

Their research indicated that investment in marketing and activating latent demand would have the single biggest impact on the High Country’s cycle visitation. As such a \$4.4 million campaign was developed (funded by the Victorian Government) to promote the Ride High Country brand – a campaign that commenced in 2018/19 but will primarily be roll-out over the life of the strategy.

The Ride High Country 2018/19 - 2021-22 Marketing Strategy will drive awareness, visitation, yield and dispersal from cycling visitors. Ride High Country inspires riders to travel to the High Country by providing detailed information for seamless trip planning. This includes suggested cycling routes, comprehensive trail mapping, cycle friendly accommodation options, transport providers, bike hire and cycle touring companies, all available from the one site www.ridehighcountry.com.au

While the cycle-specific offering holds the strongest appeal to cycling segments, the supporting regional tourism experiences – particularly nature-based and food/drinks products – have also been identified as a strong motivator. An ongoing focus on using cycle as the pillar lead, underpinned by the broader regional tourism offering will be key to amplifying efforts in this space.

The campaign is being conducted across an array of marketing channels including digital advertising, billboard advertising, Melbourne Airport takeover, video and social media content, stories in leading cycle publications (both print and online), engaging ambassadors, attendance at events and media famil visits to the region by leading cycling journalists. There is a Road Signage Program, where TNE has partnered with Regional Roads Victoria to install co-branded signage on the hero road cycling ascents in the region.



Operators

The only way to ensure local businesses/operators are featured on www.ridehighcountry.com.au, the region's primary communications platform for all things cycling, is by being a **Ride High Country Preferred (RHCP)** business - a program for businesses providing exceptional service to cycle visitors. To become a Ride High Country Preferred Business, they must:

- Be listed with the Australian Tourism Data Warehouse (ATDW)
- Provide complimentary water – cyclists must be able to refill their water bottles free of charge
- Display local cycle information – maps, guides, brochures
- Have staff who are knowledgeable regarding the local cycle offering – where to ride, location of bike stores
- They must also provide three services from an approved list, eg offering.
 - parking, repairs, cleaning, mechanics, rentals, shuttles, complimentary tools, locks

Government

Marketing assistance in the form of a \$4.4m campaign, and the Victorian Government offers the following initiatives:

- Financial support for accommodation investment
- Financial support for transport operators
- Funding for masterplans and feasibility studies
- Investment in public infrastructure within bike hubs
- Refurbishment of heritage buildings such as railway stations and goods sheds within bike hub locations
- Investment facilitation to assist private sector investors
- Investment in safe road cycling links.

An investment prospectus for the campaign is available at:

http://www.rdv.vic.gov.au/__data/assets/pdf_file/0019/1740124/Attachment-A-Cycle-Tourism-Investment-Opportunities-in-Victorias-High-Country-FINAL-19-Feb-19_web.pdf

Issues

Identified in the North East Victoria Cycling Optimisation Masterplan (NEVCO) are the following concerns:

Mountain Bike Park Land Tenure and Management

Tracks in the North East are largely maintained by mountain bike clubs and the Resort Management Boards of Mt Buller and Falls Creek. The development of further trail networks in the North East must be supported by land managers and cycling clubs, to dedicate resources to maintain trails over time. The planning for mountain bike paths and future rail trail investment requires the support of land owners and land managers. The masterplan needs to carefully consider whether projects have the support of land managers or identify strategies to gain support. A risk to investment is the development of costly infrastructure within areas that are controlled by other users and then not maintained to a high standard. Mountain bike parks need to be considered as a key recreation asset, similar to other sporting and recreational assets that are managed by Local Government Parks Departments. Responsibility of maintaining these assets should sit with Local Government due to their importance for local community health and wellbeing and economic benefits that they bring to the region. The Resort Management Boards have taken the responsibility to manage and maintain their mountain bike parks, however many of the Local Governments of the North East have not taken the same level of responsibility.

Cycle Transport and Access Transport was identified as a major issue facing the growth of cycle touring in the North East. The key issues for transport are:

- Irregularity of current passenger rail and bus services
- Limitation of 6 bikes per train; • The inability to take bikes on buses
- The poor level of infrastructure at railway stations to support cyclists
- Links from railway stations to towns or to existing rail trail networks.

Complementary Product The market research shows that one of the main reasons why road cyclists and rail trail cyclists visit the region is due to the food, wine and craft beer experience. The High Country has significant strengths in this space, providing strong motivation to visit. Given the importance of complementary product to attracting and servicing cyclists in the North East, a range of private sector investments are needed to support cycle tourism, including investment in food and beverage tourism, visitor accommodation and tours.

A targeted facilitation and investment attraction program should be delivered in the region to assist current private sector proposals are delivered and to attract other large investors to the region.

Cycle Friendly Towns identified the need for a much improved in-town network of cycle trails to link town centres with their respective rail trail network, road cycling network and mountain bike parks.

Sources:

- www.tourismnortheast.com.au/wp-content/uploads/sites/54/TNE-Three-Year-Strategy-2019-20_2021-22.pdf
- www.indigoshire.vic.gov.au/.../nevco_master_plan_summary-june2018-lq.pdf
- www.mansfield.vic.gov.au/sites/default/files/Mansfield%20Shire%20Council%202018-19%20Q4%20Report%2010.2.3%20%201%20ATTACHMENT.pdf

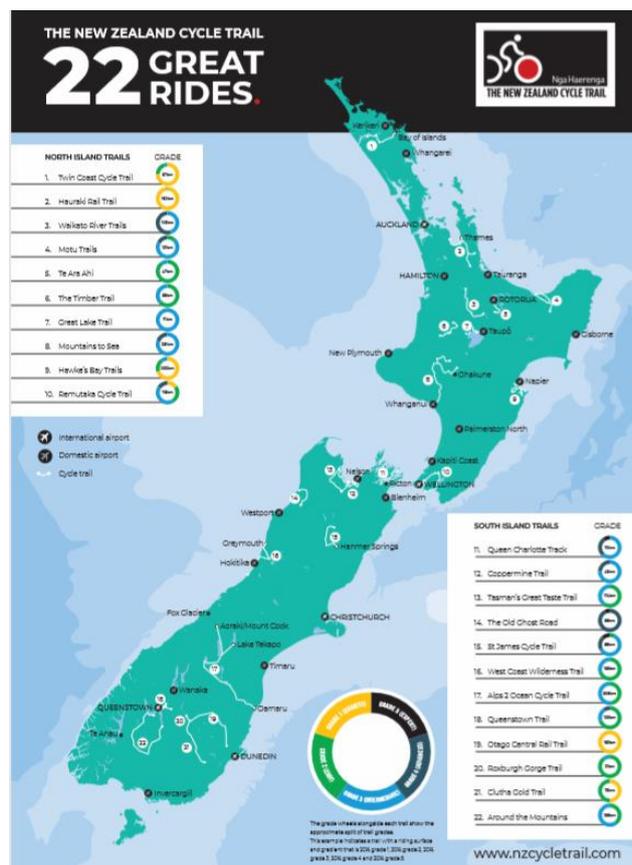


New Zealand Cycle Trail, The Journeys

Snapshot

The New Zealand Cycle Trail – also known as *Nga Haerenga* ('The Journeys') – is made up of 22 Great Rides. Created in 2009 and predominantly off-road, the trails not only showcase some of the NZ's most amazing landscapes but are also an invigorating and environmentally sustainable way to reach major sights and activities. An additional 22 Heartland Rides provide the safest road or rideable alternative linking Great Rides and other major cycle touring routes.

Many cyclists venture through less visited regions that can be ridden year-round, encouraging visitation in out of the way places outside of peak season. In 2018, more than 1.3 million trips were taken on the Great Rides by an estimated 400,000 trail users.



Marketing

Tourism NZ, state they are targeting:

- Recreational cyclists aged 45 and over from Australia, UK, USA and Germany who view nature/scenic attractions as key reasons for travel. These visitors are generally well-travelled, financially secure and very keen to experience other activities alongside their cycling experience.
- Mountain biking enthusiasts aged 25-40 from Australia who are looking for new challenges and thrills. These visitors generally travel in small groups and may seek extra adrenaline filled, competitive activities to complement their mountain biking experience.

Key insights and the trails points of difference include:

- Accessibility (easy access to natural environments)
- Diversity (of the trails and the landscape)
- Proximity (to other activities, towns and cities)
- People (friendly locals)

Online marketing emphasises that although most of the Great Rides offer multi-day riding experiences, many can also be enjoyed as short rides, from an hour to all day. A couple are loop rides, but most provide a one-way journey (often best ridden in a certain direction to take advantage of the topography) with others offering side trails or detours to suit particular interests and itineraries. The 21km Roxburgh Gorge Trail is the shortest of the Great Rides, while the epic Alps 2 Ocean is the longest at 306km.

There is a Great Rides App, with more than 1500 pages, it's stacked with maps, elevation profiles, trail section descriptions and photos, along with details of trail services such as bike hire, shuttles, food and accommodation. It also boasts offline tracking using mobile GPS.

The economic contribution of the cycle trails in 2015 was estimated at \$37.4 million. These benefits were derived from projections of annual revenues from international visitors, and producer and consumer surpluses from annual domestic visitor spending. The evaluation further showed that the cycle trails helped revitalise small communities including historic hubs, increased and expanded the number of local businesses, and created jobs close to the locality of the trails.

Operators

The trails are well served by local and national cycle tour companies offering everything from bike hire and shuttles, to fully guided multi-day trips including all meals, accommodation and luggage transfers, as well as off-the-bike activities such as hiking, kayaking and wine tasting.

The opportunity to stay on or near the trails is a major highlight of many Great Rides. The options range greatly –from nature campsites and mountain huts, to B&Bs, motels and hotels.



Government

Initially the NZ Government committed a \$50 million fund to create a continuous touring route running the length of the country. This funding was matched by an additional \$30 million from councils and local organisations, many operating at grass-root level. It soon became apparent, that building one continuous route across the two islands was not only too ambitious, it also would bypass many of New Zealand’s most interesting places.

Restoring and extending established pathways made more sense, enabling cyclists to visit significant historic and cultural sites while traversing some the country’s most impressive landscapes. Long-established rides could also be brought into the Great Ride family, such as the Otago Central Rail Trail and the Queen Charlotte Track.

Government funding of the trails is ongoing, as is the support of communities through council funding and significant contributions from local clubs and organisations, often volunteers.

Management

The New Zealand Cycle Trail is managed by the national organisation Nga Haerenga The New Zealand Incorporated (NZCT Inc.) NZCT Inc. was established in 2014 as an independent body responsible for the long-term governance and management of the New Zealand Cycle Trail. The NZCT provides overall leadership, direction, guidance and support to the 22 Great Rides.

NZCT Inc. operates under the direction of a board consisting of five elected voluntary members and a paid Chair appointed by the government. In addition, NZCT Inc. employs a general manager and several part-time supporting contractors.

Future plans include building stronger relationships with and between trail operators such as accommodation, food, cycle tour and shuttle companies. NZCT also aims to foster closer co-operation between those operators and local trail governance and management, with the outcome of trails delivering outstanding customer experiences.

NZCT Inc. is also focused on growing the international cycle tourism market, specifically the active traveller market. In particular, NZCT Inc. plans to work closely with Tourism New Zealand to target key Australian markets and travel agents.

The success of the New Zealand Cycle Trail project is evaluated through ongoing surveys, annual trail warrants of fitness and trail counters.

The NZCT has national partners – e.g.

The New Zealand Cycle Trail Design Guide was first published in February 2010 to assist people involved in planning, designing or building cycle trails that would make up the New Zealand Cycle Trail.

Issues

Governance and Management

- There is no one-size-fits-all governance and management structure at the trail level. This has given rise to variations of governance and management structures.
- The following key factors of success, which can be used by NZCT and governance organisations to inform overall governance and management of the Great Rides:
 - a governance body at trail level that has a clear strategy, leadership and direction
 - appointment of board members with relevant skills and experience, and the inclusion of local executives in the governance body
 - clarity around the roles and responsibilities of the governance body, including the separation of their governance and management duties
 - having a dedicated resource to maintain and develop the cycle trails
 - involvement of the local or central government in the management structures
 - clear roles and responsibilities of trail partners, and clarity about partners' commitment to long-term funding
 - existence of a dedicated and specialist team at the regional level that helps with marketing and promotion of the cycle trails.

Risks to Sustainability

The trails need to be sustainable over the longer term, some threats identified include:

- the lack of trustees for trail trusts especially in small rural areas
- NZCT Inc. is under resourced to do the tasks expected of them
- trail managers are working more than the hours they are paid for
- volunteer burn out
- competing funding priorities at the regional and district council levels
- insufficient funding for track maintenance
- development of new and mature tourism products and market them internationally
- businesses who are benefiting from the trail but who are not joining the partnership programme
- non-delivery of commitment of some trail partners to maintain the trails.

Sources:

- www.nzcycletrail.com/assets/Maps/Overview-Map/NZCT_A4-Map-Update_4.0.pdf
- www.mbie.govt.nz/assets/7661de82b6/nz-cycle-trail-evaluation-report-2016.pdf
- <https://www.tourismnewzealand.com/markets-stats/sectors/special-interest/cycling-and-mountain-biking/>

Governance and management area	What worked	What were the challenges
Trail governance	A governance body that has a clear strategy, leadership and direction Appointment of board members with relevant skills and experience, and inclusion of local executives in the governance body Clarity around the roles and responsibilities of the governance body including the separation of governance and management duties	Where there were multiple agencies included, it is sometimes difficult to work on a shared common goal Sustainability of a trust structure (ie lack of succession planning and the risk of volunteer fatigue) especially in a small, rural area Difficulty with recruiting volunteer trustees with necessary skills especially in small, rural areas.
Trail management	A dedicated resource to maintain and develop the cycle trails Involvement of the local government or central government in the management structure	Sustainability of a trust structure (ie, lack of succession planning and risk of volunteer fatigue) Management processes and systems still lacking
Trail maintenance	Clear roles and responsibilities of trail partners' long term commitment to funding.	Lack of clarity around roles and responsibilities amongst trail partners Non-delivery of commitment of some trail partners to maintain the trails Failure to embed trail maintenance arrangement during the build phase of the cycle trails No established maintenance standards and different concepts of what level is acceptable
Trail marketing and promotion	Existence of a dedicated and specialist team at the regional level that helps with marketing and promoting the cycle trails	Lack of support to trails in developing mature products ready for international market promotion by Tourism New Zealand



Barwon South West Adventure Trails, Victoria

The Barwon South West region of Victoria wanted to plan and position itself as an adventure trails destination. The region covers 9 local government areas and incorporates numerous reserves, natural areas and visitor destinations.

Previous planning efforts for walking, cycling and mountain biking had been challenged by the complexity of the region, its numerous stakeholders and the large range of trails and trail management arrangements.

Over 20 trails already existed in the region, including 6 international and nationally significant trails and mountain biking hubs. An impressive calendar of international and national cycling and trail based events was also in place.

A Vision and Business Case, Action Plan, Cycle Tourism Strategy, Marketing Strategy and Guidelines for Trail Planning, Design and Management were each prepared to achieve a coordinated and collaborative approach in developing a leading trails destination.

The approach taken was visitor-centric, rather than a landowner/manager approach and best-practice from world leading trail developers was utilised.

The outcomes included successful buy-in to the importance of lead and support trails, and agreement on which was which; community support and an understanding of the roles of the different trails; trails construction and management guidelines to assist the community; agreement to the commitment of funds to jointly invest in the priority trails; and a business case for investment. Importantly, the project was been implemented with the stakeholders continuing to work closely together on the agreed strategy. This included giving priority to a small number of iconic trails that could position the region, without being parochial. These would be priorities for investment, development and marketing within the bounds of expected resources.

These prioritised trails would become flagships for the region, form the core adventure trails and cycle tourism offering in the region and be used to attract private and public sector investment, and would offer the best opportunity for revenue generation.

- Great Ocean Walk
- Grampians Peaks Trail
- You Yangs MTB Trails
- Surf Coast Walk
- Forrest MTB Trails
- Twelve Apostles Trail
- Great South West Walk With implementation of the proposed improvements and if the leading trails continued to attract existing and new visitors to the region, it was estimated that a 10% increase in visitor numbers could be achieved. This would result in an estimated \$24 million in direct visitor expenditure per annum in the region and 273 jobs. In addition, the flow-on effects as a result of indirect expenditure were expected to be greater. ¹⁵

The Barwon South West Adventure trail network is expected to deliver significant economic benefits to the Victorian community. With a 6 year investment of \$40 million, the trail network net upgrade is expected to deliver \$74.7 million in benefits over 10 years.¹⁶

TRC's success in developing a workable and consistent regional approach to partnering in the delivery of a trail destination in the Barwon South West region of Victoria was recognised in the Planning Institute of Australia (PIA) Awards for Planning Excellence. The Guidelines won the Victorian Best Planning Ideas – Large Projects Award in 2015. The project also received an award from Parks and Leisure Australia in 2016.

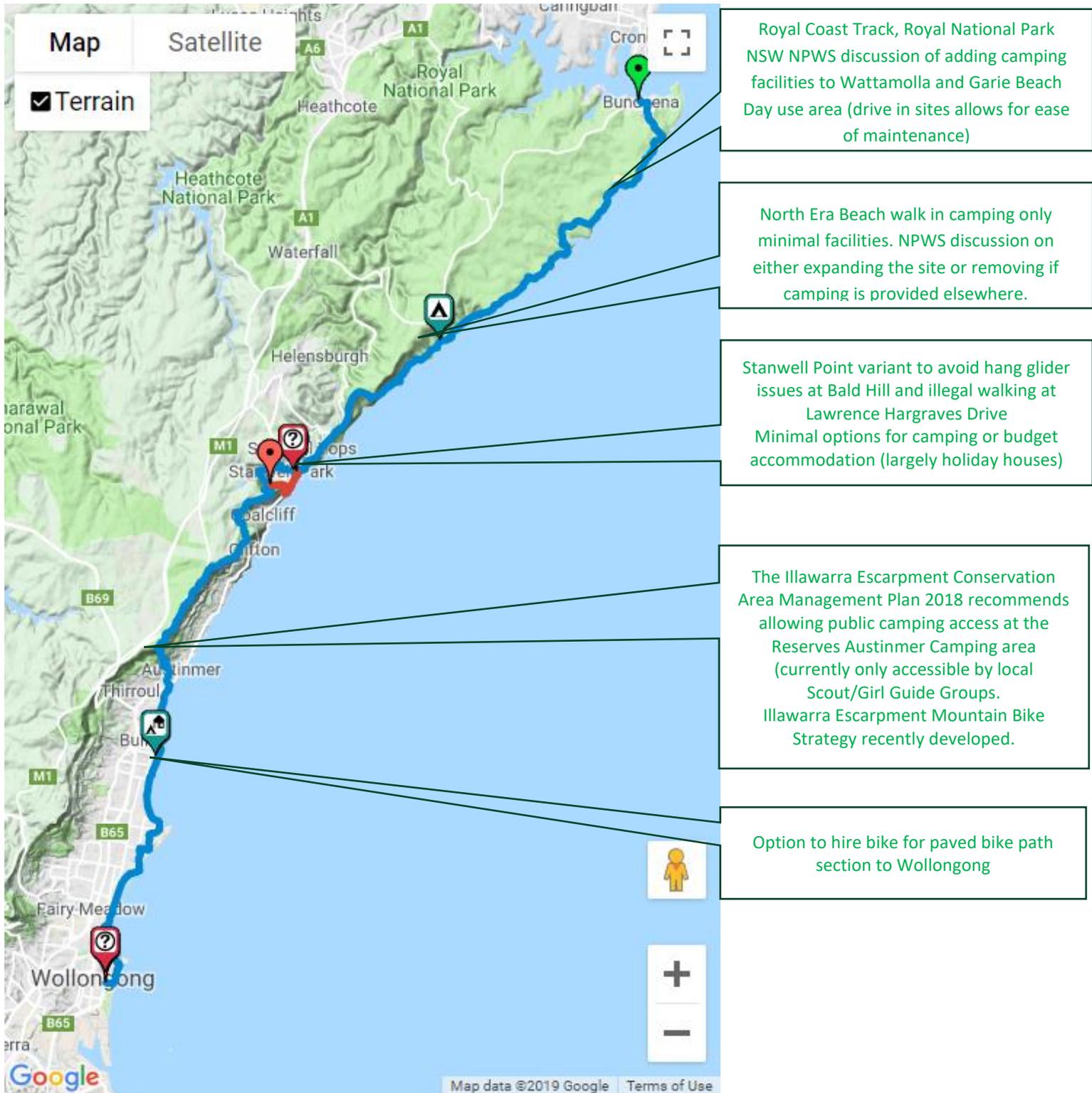


¹⁵ TRC Tourism, Growing Adventure Tourism in Barwon South West Region, A Business Case for Investing in Regional Trails in Barwon South West Region, June 2015

¹⁶ TRC Tourism, Growing Adventure Tourism in Barwon South West Region, A Business Case for Investing in Regional Trails in Barwon South West Region, June 2015

APPENDIX F – GREAT SOUTH COAST WALK SECTION OVERVIEW¹⁷

STAGE 1 - Bundeena to Wollongong, 63 km / 3 days

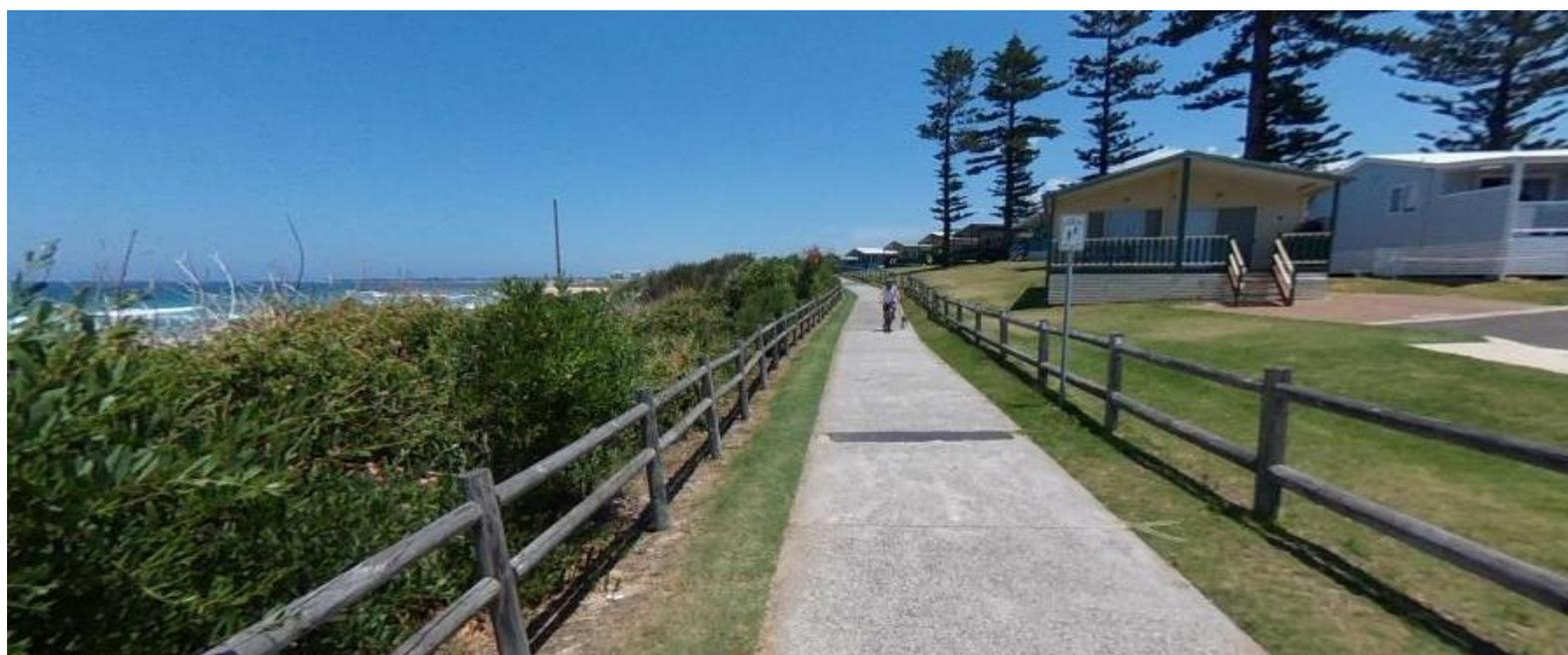


¹⁷ <https://greatsouthcoastwalk.net>

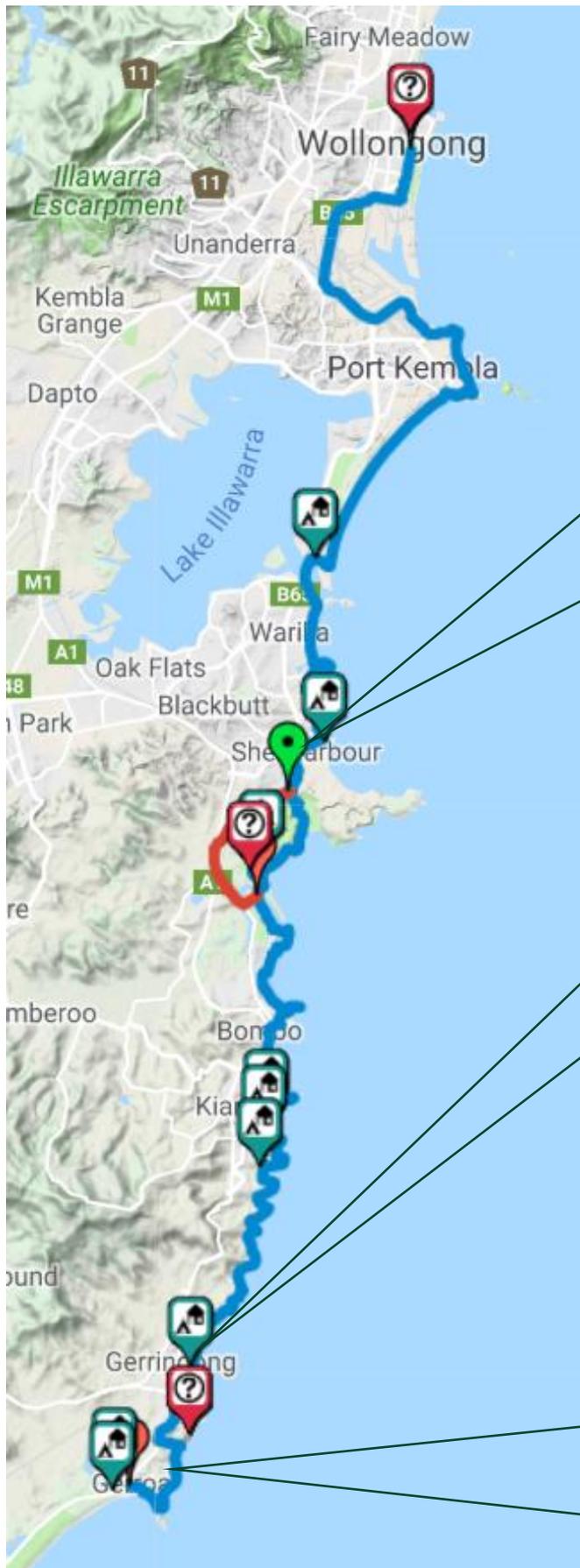
Royal Coast Track (Bundeena to Otford)						
Section	Distance	Grade	Accessibility	Managed by	Facilities	Issues / Opportunities
Start of Royal Coast Track Bundeena to Wedding Cake Rock	3.2 km (one way)	Grade 5	No wheelchair access	NSW NPWS	Public Toilet at trail head	Small car park No sense of arrival
Wedding Cake Rock to Wattamolla Beach, Falls and Picnic Area	4.5 km	Grade 5	No wheelchair access	NSW NPWS	Toilets (flushing) Picnic tables Barbecue facilities Car parking	No potable water No camping
Wattamolla Beach to Garie Beach Picnic Area	7.3 km	Grade 5		NSW NPWS	Toilets (flushing) Picnic tables Car parking Café	No potable water No camping Proposal to add camping at Wattamolla & Garie Beach
Garie Beach to North Era Campground	1.5 km	Grade 5		NSW NPWS	Toilets (non-flush) Remote tent/backpack camping only (walk in access) Camping fees apply (online booking, min 2 days in advance) \$12pp Max capacity 36 campers	Proposal to expand and improve facilities at North Era Campground, or remove if new campgrounds added at Garie Beach / Wattamolla
North Era Campground to Otford	9.1 km	Grade 5		NSW NPWS	Various points of interest along the way including Burning Palms Beach & rainforest, Figure 8 Pools, Palm Jungle, Werrong Lookout, Otford Lookout, Bald Hill Various B & B style accommodation available at Stanwell	No facilities enroute until Otford/Stanwell No camping facilities at Stanwell Bald Hill is used by a hang-gliding operator which may be dangerous for walkers.

Forest Walk to Sublime Point Track / Illawarra Escarpment (Stanwell to Austimer)						
Section	Distance	Grade	Accessibility	Managed by	Facilities	Issues / Opportunities
Stanwell to Austimer	14 km one way	4	No	NSW NPWS	No facilities provided along the track, however off track there are a range of accommodation and meal options (as per audit).	National Parks Associations of NSW Illawarra are promoting this and have dubbed it The Grand Escarpment Walk . Such a walk, connecting the Royal National Park to the southern Illawarra and even further south to Morton National Park has the potential to become an iconic great walk for NSW. The City of Wollongong has prepared a Master Plan (2013) for the Grand Pacific Walk encompassing Royal Coast NP to Lake Illawarra.
Austinmer to Wollongong						
Austinmer to Wollongong via Thirroul, Bulli, Woonona, Bellambi, Corrimal.	Approx. 20 km	Easy? (paved)		Wollongong City Council	Various park and beach facilities including water, BBQs, shelters, toilets. A range of accommodation B & Bs, holiday homes and campgrounds.	Along existing urban shared-use paved coastal trails. Option to hire a bike for this stage of the walk using the bike trails, pick up from Bulli and return to Windang Tourist Park.

IMAGE MUCH OF THE AUSTINMER TO WOLLONGONG TRACK IS SHARED-USE FOOTPATH BY THE COAST



STAGE 2 – WOLLONGONG TO GERROA (63 KM / 3 DAYS)



Shellharbour to Minnimurra River:

Alternate routes, inland (red track walk) or via swim/kayak

- Swimming the river (needs to be done at the turn of a low tide, as at other times tidal currents could make this dangerous)
- Kayak can be hired from www.escapekayaktours.com.au only based at the crossing point on weekends.

Land Tenure – private land Gerrigong

It is not possible to walk the rock platform here as it is blocked by a deep sea trench. Walking above the cliffs appears to involve crossing a bit of private land - maybe a passage can be negotiated and this could extend the Kiama Coastal Track.

Extending the Kiama Coastal Track

The existing 22 km Kiama Coastal Track travels from Minnimurra River to Gerringong. Previous discussions have considered extending the track to Gerroa and beyond to Seven Mile Beach along a newly constructed Coastal trail. At present, walkers from Gerringong to Gerroa and south walk along roadside footpaths.

Wollongong via Lake Illawarra, Shellharbour, Reflections Killalea Reserve to Minnimurra River

Section	Distance	Grade	Accessibility	Managed by	Facilities	Issues / Opportunities
Wollongong to Lake Illawarra	15.9 km	Easy along formed urban pathways		Wollongong City Council	Various due to urban area Killalea Reserve (camping, water, picnic, bunkhouse)	The walk is described as a 'transition' day, mainly walking through urban streetscape to connect from Wollongong City to Lake Illawarra and a return to coastal walks.
Lake Illawarra to Killelea Reserve and Minnimurra	6.8 km	Easy along formed urban pathways		City of Shellharbour	Lake Illawarra – shared use formed pathways, toilets, picnic facilities. Killelea Reserve – camping or bunkhouse accommodation.	Alternate routes available: Walk inland (as per map) or Swim/kayak across Minnimurra River Swimming the river (needs to be done at the turn of a low tide, as at other times tidal currents could make this dangerous) Kayak can be hired from www.escapekayaktours.com.au only based at the crossing point on weekends.

Kiama Coastal Walk

Minnamurra River to Kiama Blowhole (8.4 km) Blowhole Point to Loves Bay (5 km with some steep ascent/descents on steps) Loves Bay to Gerrigong (6 km) along coast-side pastures (marked route).	22 km in total	Medium to hard	No	Municipality of Kiama	On the fringe of urban areas, close to train line, cafes and beach-side park facilities (toilets, water, picnic). Incorporates Kiama Village, Cathedral Rocks and Blowhole.	Previous discussions on further extending the Kiama Coastal Walk to connect Gerrigong to Gerroa and Seven Mile Beach Walk.
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Gerringong to Gerroa						
Section	Distance	Grade	Accessibility	Managed by	Facilities	Issues / Opportunities
Gerringong to Gerroa	4.1 km	Easy		Municipality of Kiama	Walk through urban footpaths, various facilities at Gerroa (accommodation, services).	Walk through urban area only. Option (indicated on map) to traverse on private land along Coastal cliffs between Gerringong and Gerroa, extending the Kiama Coastal Walk.

IMAGE 1 BEACH WALKING ALONG THE KIAMA COASTAL WALK



STAGE 3 – GERROA TO HUSKISSON (52 KM / 3 DAYS)



Shoalhaven River Mouth

- When the River Mouth is closed, you can walk across the sandbar to Comerong Island. To avoid private property, instead of wading the tidal flat it may be better to walk down the beach and pick up the track through the nature park to Comerong Island Road.
- When the River Mouth is open (has been recently due to flooding), either a long bus trip through Nowra to Greenwell Point or Culburra is required or, alternatively, a boat trip across the river to Comerong Island. The possibility of private boat owners to transfer walkers for a fee at Shoalhaven Heads needs to be investigated.

Comerong Ferry

- Required for crossing www.shoalhaven.nsw.gov.au/Discover-Shoalhaven/Getting-around

Greenwell Point (Private land)
The route from Comerong Island Ferry to Greenwell Point passes along a narrow farm road on private land and access needs to be negotiated.

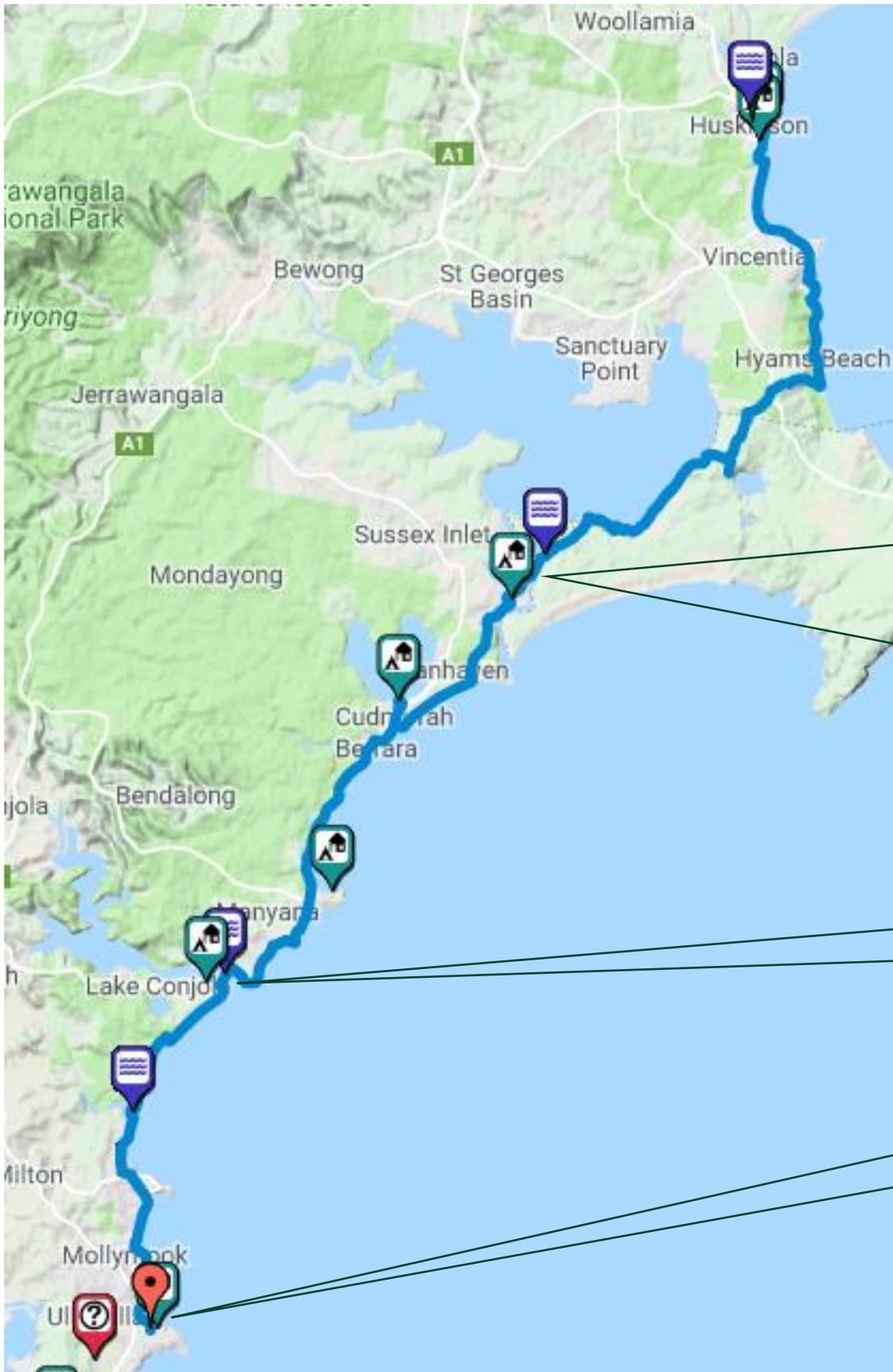
Greenwell Point to Orient Point
Required - Hire boat and driver at Anglers Rest (<http://www.anglersrest.com.au/boat-hire/hire-a-boat-on-the-south-coast-for-some-fishing-relaxing/>)

Wollumboola Lake Track improvement (Private land)
While negotiable (faint 4WD track), some improved track is needed along the eastern shore of the lake to Currarong Road.

Currumbene Creek
There is a water crossing at Currumbene Creek to reach Huskisson. It is deep but short, so can be swum, but perhaps finding a boat-hire place or boat-owner prepared to ferry people across might be desirable. The Husky Ferry might be an option but does not have a frequent timetable. <http://www.huskyferry.com/>

Gerroa to Seven Mile Beach National Park and Shoalhaven Heads						
Section	Distance	Grade	Accessibility	Managed by	Facilities	Issues / Opportunities
Gerroa to Seven Mile Beach and Shoalhaven Head	12.8 km	4		Municipality of Kiama / NSW NPWS	Varying facilities, walk through urban area into Seven Mile Beach. Seven Mile Beach has day-use facilities including toilets, showers, picnic and walking tracks.	
Shoalhaven Heads to Culburra and Jervis Bay National Park						
Shoalhaven Heads to Comerong Ferry	Approx. 7 km when River is closed			Shoalhaven City Council Comerong Island Nature Reserve – NSW NPWS	Comerong Ferry Picnic area at Comerong Island Nature Reserve Various facilities (accommodation, services) available at Shoalhaven Heads	Issues with crossing Shoalhaven River Head as identified. When River is closed, can be walked. Alternate options are long bus journey to reconnect walk or consideration of private boat operator to ferry walkers.
Comerong Ferry to Greenwell Point	5.1 km	?		Private Land	Nil until Greenwell Point (accommodation, services)	Track passes through private land. Boat and driver hire required to cross Greenwell Point to Orient Point.
Orient Point to Culburra Beach & Jervis Bay National Park	Approx. 8 km			Shoalhaven City Council NSW NPWS	Various facilities (accommodation, camping, services) available at Culburra Beach. Jervis Bay NP is day use facilities only.	Walk passes to the east of Lake Wollumboola (Private land). Access needs to be negotiated and improved track is needed along the eastern shore of the lake to Currarong Road. No camping options at Jervis Bay
Jervis Bay to Huskisson via Callala Beach						
Section	Distance	Grade	Accessibility	Managed by	Facilities	Issues/Options
Jervis Bay to Huskisson via Callala Beach	Approx. 12 km	?		City of Shoalhaven NSW NPWS	Departing Jervis Bay National Park, there are several accommodation and visitor facilities along the coast.	The final leg into Huskisson is via Currambene Creek. It is deep but short, so can be swum, but finding a boat ferry operator may be preferable. The Husky Ferry might be an option but does not have a frequent timetable. http://www.huskyferry.com/

STAGE 4 – HUSKISSON TO ULLADULLA (60 KM / 4 DAYS)



Crossing Christians Minde
A private enclave within Booderee National Park, in order to reach Sussex Inlet. Permission should be sought or a general right of passage negotiated.

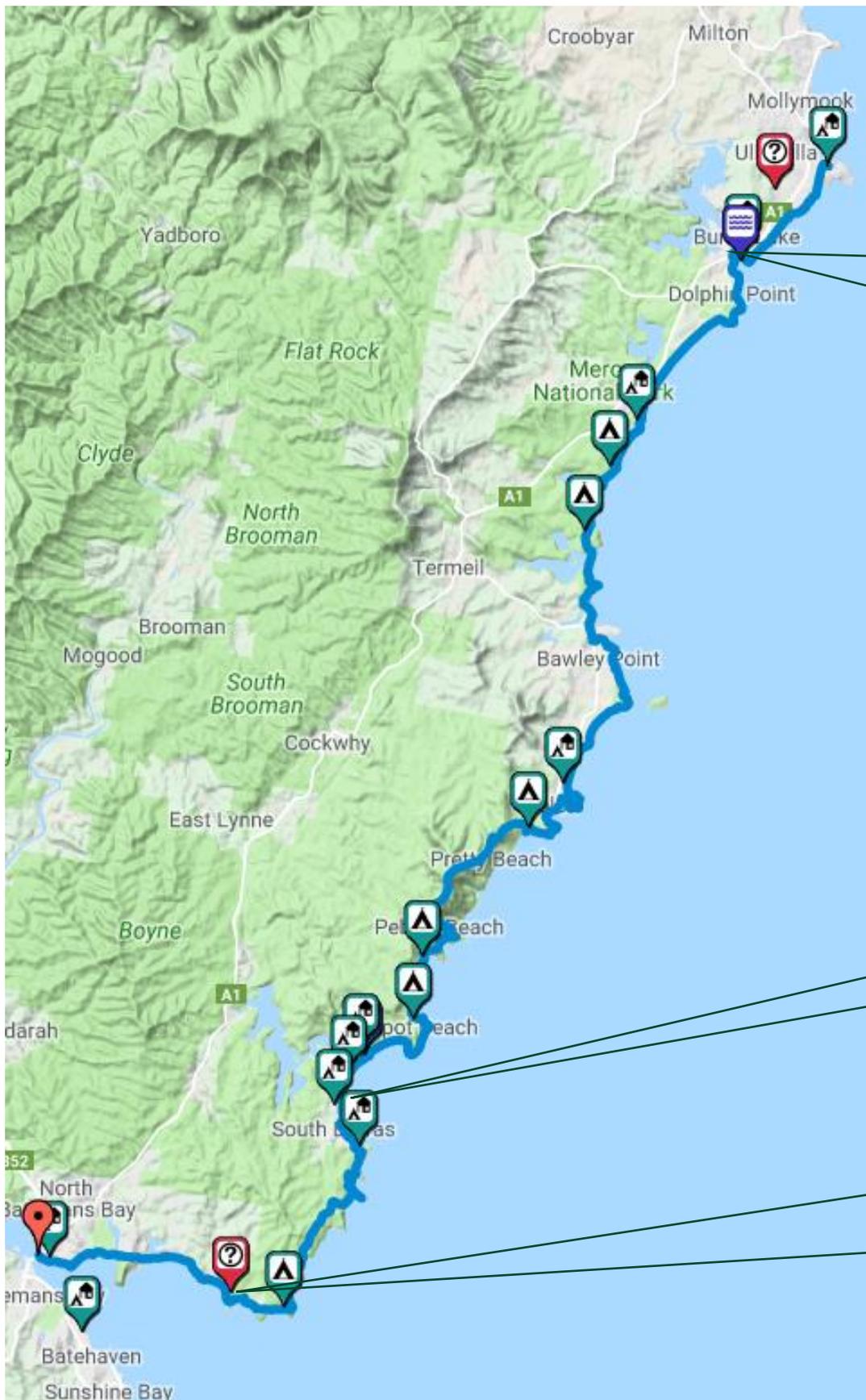
Sussex Inlet
Boat required to cross - call boat and driver from Sussex Inlet Marine Centre to arrange (www.sussexinlet.info/marine)

Lake Conjola Entrance
Wade and swim across at low tide

Narrawallee Inlet
Wade and swim across at low tide

Huskisson to Hyams Beach (Jervis Bay National Park)						
Section	Distance	Grade	Accessibility	Managed by	Facilities	Issues / Opportunities
Huskisson to Hyams Beach	8.2 km	3		City of Shoalhaven NSW NPWS	Incorporates NSW NPWS White Sands and Scribbly Gums Walk (2 km) Jervis Bay and the Hyams Beach Walk (1 km). In park picnic facilities and toilets.	No camping available at Hyams Beach, however holiday/ B & B accom. Available.
Hyam Beach through Booderee National Park via Ellmoos Rd to Sussex Inlet	Approx. 10 km	?		Parks Australia NSW NPWS	Ellmoos Rd is an unsealed service road only for Booderee. There are turn-offs for walkers to stay at Park managed campgrounds, use facilities, visit points of interest or stay at in-park accommodation. Sussex Inlet provides some accommodation options including caravan parks.	Park use fees are required for Booderee National Park. Clarity needs to be sought on whether traversing only via the unsealed road requires a park pass. https://parksaustralia.gov.au/booderee/plan/maps-apps-info/ To access Sussex Inlet walkers need to briefly cross Christians Minde, a private enclave within Jervis Bay National Park, in order to reach Sussex Inlet. Permission should be sought or a general right of passage negotiated. Boat required to cross - call boat and driver from Sussex Inlet Marine Centre to arrange (http://www.sussexinlet.info/marine/).
Sussex Inlet to Conjola National Park	Approx. 10 km			NSW NPWS	Walk isn't along any existing National Park tracks, but along the beach.	Walkers are advised to wade across Lake Conjola at low tide to continue the Walk
Conjola National Park to Ulladulla (via Narrawallee Creek Nature Reserve)	?	3		NSW NPWS Shoalhaven City Council	Narrawallee Creek has a couple of walks that the Great South Coast Track utilises – the Burrawang Track (1km) and the Narrawallee Inlet. Picnic facilities are available in the Reserve	Walkers will need to wade across the Narrawallee Inlet at low tide. From Narrawallee via Mollymook to Ulladulla a range of beachside accommodation and services exist.

STAGE 5 – ULLADULLA TO BATEMANS BAY (76 KM / 4 DAYS)



Burrill Lake
Wade and swim across at low tide, alternative bridge crossing not far upstream

Lake Durras
Wade and swim across at low tide

East of Maloneys Beach
There is a short section where there is no track and a GPS is needed to walk through the open forest from North Head Beach to Yellow Rock cabins (part of Murramarang NP)

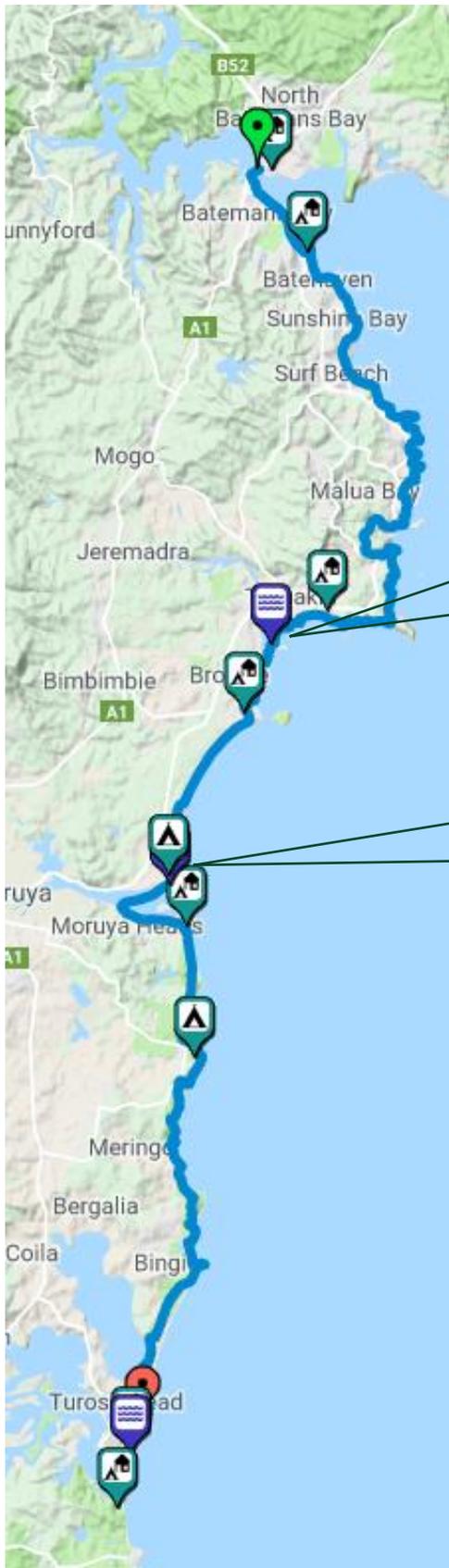
Ulladulla to Batemans Bay

Section	Distance	Grade	Accessibility	Managed by	Facilities	Issues / Opportunities
Ulladulla to Meroo National Park	Approx. 13.4 km	3		NSW NPWS Shoalhaven City Council	Barnunj State Conservation Area Meroo National Park – (Nuggan Point Walking Track 2.5km) Cullendulla Nature Reserve	Burrill Lake - Wade and swim across at low tide, alternative bridge crossing not far upstream.
Meroo National Park to Murramarang National Park	? Approx 20 km to Murramarang start and 20km through the Park	Murramarang trail Grade 3-5		NSW NPWS Shoalhaven City Council	Murramarang Aboriginal Heritage Murramarang National Park – Pretty Beach to Snake Bay Walking Track (approx. 5 km one way) – links up to Pebbly Beach to Snake Bay approx. 2.5km one way grade 4). Rock Platform Walk (1km grade 4) Burrawang Walking Track (1km grade 4) Wasp Head Walk (1km grade 3) North Head Lookout (easy) Acheron Ledge Walking Track (1km, Grade 3) Murramarang accommodation in park includes Pretty Beach Cabins and Campground, Pebbly Beach Campground with toilets, BBQs and picnic facilities and Depot Beach Campground and Cabins, NRMA Beachfront Murramarang Nature Resort, North Head Campground, Yellow Rock Beach House	There are several short coastal walks in Murramarang that could possibly be extended and connected to create longer overnight experiences. There are sufficient well spaced camping areas throughout the park to allow for this. Lake Durras, need to wade across at low tide.

Ulladulla to Batemans Bay

Section	Distance	Grade	Accessibility	Managed by	Facilities	Issues / Opportunities
Murramarang National Park to Batemans Bay	Approx. 22km			Eurobodalla Shire NSW NPWS	A range of services and accommodation exists from the national park to Batemans Bay. Cullendulla Creek Nature Reserve: Square Head Track (approx. 1km grade 3) Cullendulla Beach Track (1km grade 3)	East of Maloneys Beach There is a short section where there is no track and a GPS is needed to walk through the open forest from North Head Beach to Yellow Rock cabins (part of Murramarang NP).

STAGE 6 – BATEMANS BAY TO TUROSS HEAD (57 KM / 3-4 DAYS)



Tomaga River

Short swim - backpacks can be floated across on an air mattress (check tides). Can be detoured via the George Bass Bridge upstream

Moruya River Mouth

Can call a boat from Moruya to come and take you across - a bit costly but it is a long detour to walk upstream to the Moruya Bridge.

Batemans Bay to Tuross Head						
Section	Distance	Grade	Accessibility	Managed by	Facilities	Issues / Opportunities
Batemans Bay to Moruya River	Approx. 30 km			Eurobodalla Shire	Walk is largely through urban coastal towns, many options for accommodation and services.	Moruya River Mouth Can call a boat from Moruya to come and take walkers across - a bit costly but it is a long detour to walk upstream to the Moruya Bridge.
Moruya River to Bingie Dreaming Track and Tuross Head				Eurobodalla Shire NSW NPWS	Bingie Dreaming Track (13.5 km /grade 3) Eurobodalla National Park Congo Campground at Track Head	A range of visitor facilities and activities at Tuross Head http://www.turosshead.org/

STAGE 7 – TUROSS HEAD TO BERMAGUI (56 KM / 3-4 DAYS)



Tuross Lake Entrance

Sometimes wadable in calm conditions and low tide. Otherwise a boat crossing might need to be arranged from the Tuross Lake Boatshed. The Tuross Marine Rescue people may take you in their zodiac for a donation

(<http://www.turosshead.org/Pages/Rescue.htm>)

The rocky headland of Glasshouse Rocks Beach might only be passable at low tide. I suspect that the land on the cliff top is private - needs checking out.

Tuross Head to Bermagui						
Section	Distance	Grade	Accessibility	Managed by	Facilities	Issues / Opportunities
Tuross Head to Eurobodalla National Park	Approx 10 km			NSW NPWS Eurobodalla Shire	No set walking trails in this section of Eurobodalla, however accommodation exists in the Park at the Beachcomber Holiday Park and Brou Lake Campground. Walk is along the beach.	Tuross Lake Entrance Sometimes wadable in calm conditions and low tide. Otherwise a boat crossing might need to be arranged from the Tuross Lake Boatshed. The Tuross Marine Rescue people may take walkers in their zodiac for a donation (http://www.turosshead.org/Pages/Rescue.htm)
Eurobodalla National Park to Bergamui	Approx 46 km			NSW NPWS Eurobodalla Shire	Yuin Cultural Heritage Trail	The rocky headland of Glasshouse Rocks Beach might only be passable at low tide. I suspect that the land on the cliff top is private - needs checking out.

STAGE 8 – BERMAGUI TO TATHRA (44 KM / 3 DAYS)



North of Murrah Lagoon (Private Land)
 There is no track in this stretch - the bush is easy to walk through, but may be on private land. Needs investigating.

South of Aragunnu No existing track (Private land)
 No track and heavy scrubby bush with rocky and sometimes impassable coastline - the best solution would be to cut a 3 km track through state-owned forest just in from the coast. It is also possible to walk easily further inland, but this involves crossing private land and rights would need to be negotiated, or else making a long detour on local roads.

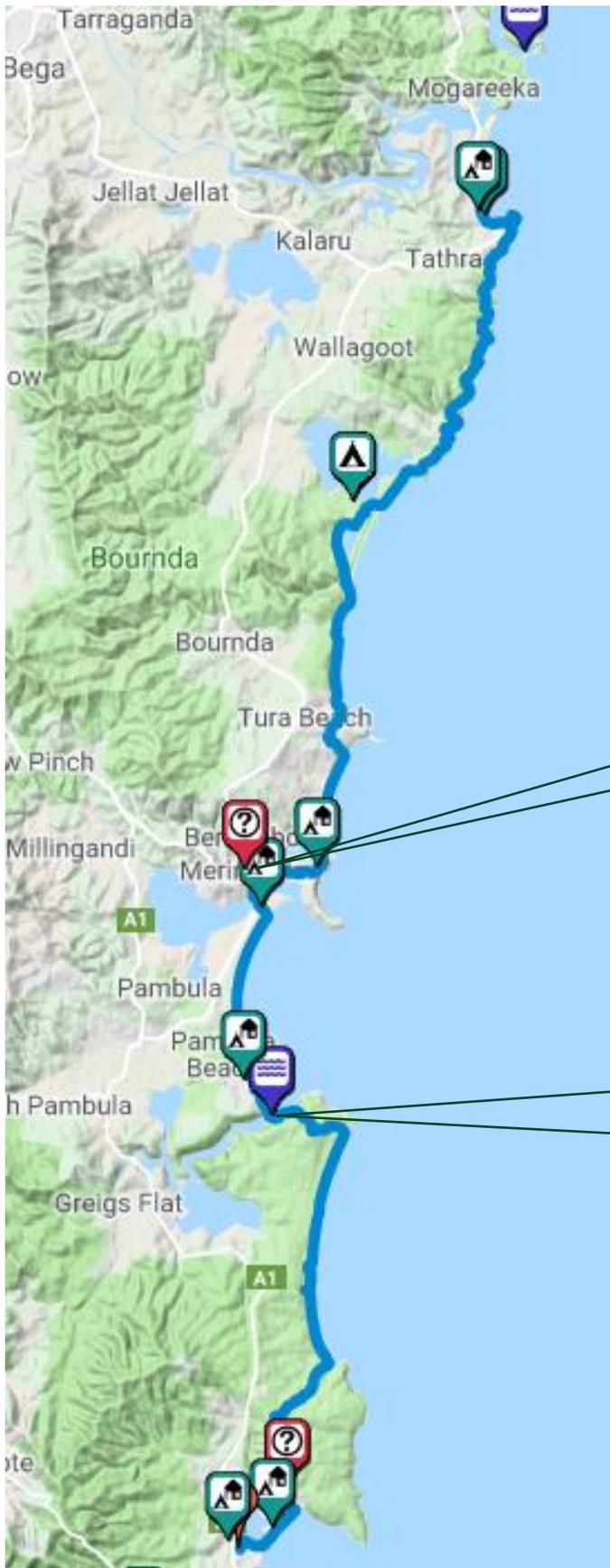
Wapengo Lake
 Wade and swim at low tide (use air mattress to carry backpacks). This is one place where a "canoe crossing" (like on the Bibbulmun Track) would work well.

Nelson Lagoon
 Wade (and possible short swim) at low tide.

Tuross Head to Bergamui

Section	Distance	Grade	Accessibility	Managed by	Facilities	Issues / Opportunities
Bergamui to Tathra				Bega Valley Shire NSW NPWS	Mimosa Rocks National Park – limited walking track however camps available – Hidden Valley bush camp, Aragunnu Campground. Range of accommodation options available at Tathra.	<p>For about 500m south of Armonds Beach there is no track at all and walkers need to navigate by map or GPS through some fairly open forest to reach a dirt road to Murrah Lagoon. Some simple markers would help here. This may also be private land, so permission needs to be sought or a right of passage negotiated.</p> <p>The start of the track from Bunga Beach to Aragunnu is a bit difficult to find, but this can be solved easily with markers.</p> <p>There is no track next to the coast from Aragunnu to Picnic Point. The rocks along the beach become impassable due to deep channels and sea-caves and the coastal scrub is very dense here. An inland route has been listed along Aragunnu Road and then follow the edge of paddocks (private land) to reach Wapengo Road. The best solution would be to lay a more direct foot track through National Park land - perhaps only 3 km needed.</p> <p>South of Picnic Point it is necessary to pass through private land to reach Bithry Inlet - a right of passage needs to be negotiated. Bithry Inlet itself is a wide crossing and may be well-suited to having canoes provided (as on the Bibbulmun Track) for hikers to cross. One side is private and the other is a National Park run homestead, can be swum and low tide.</p>

SECTION 9 – TATHRA TO EDEN (50 KM / 3 DAYS)



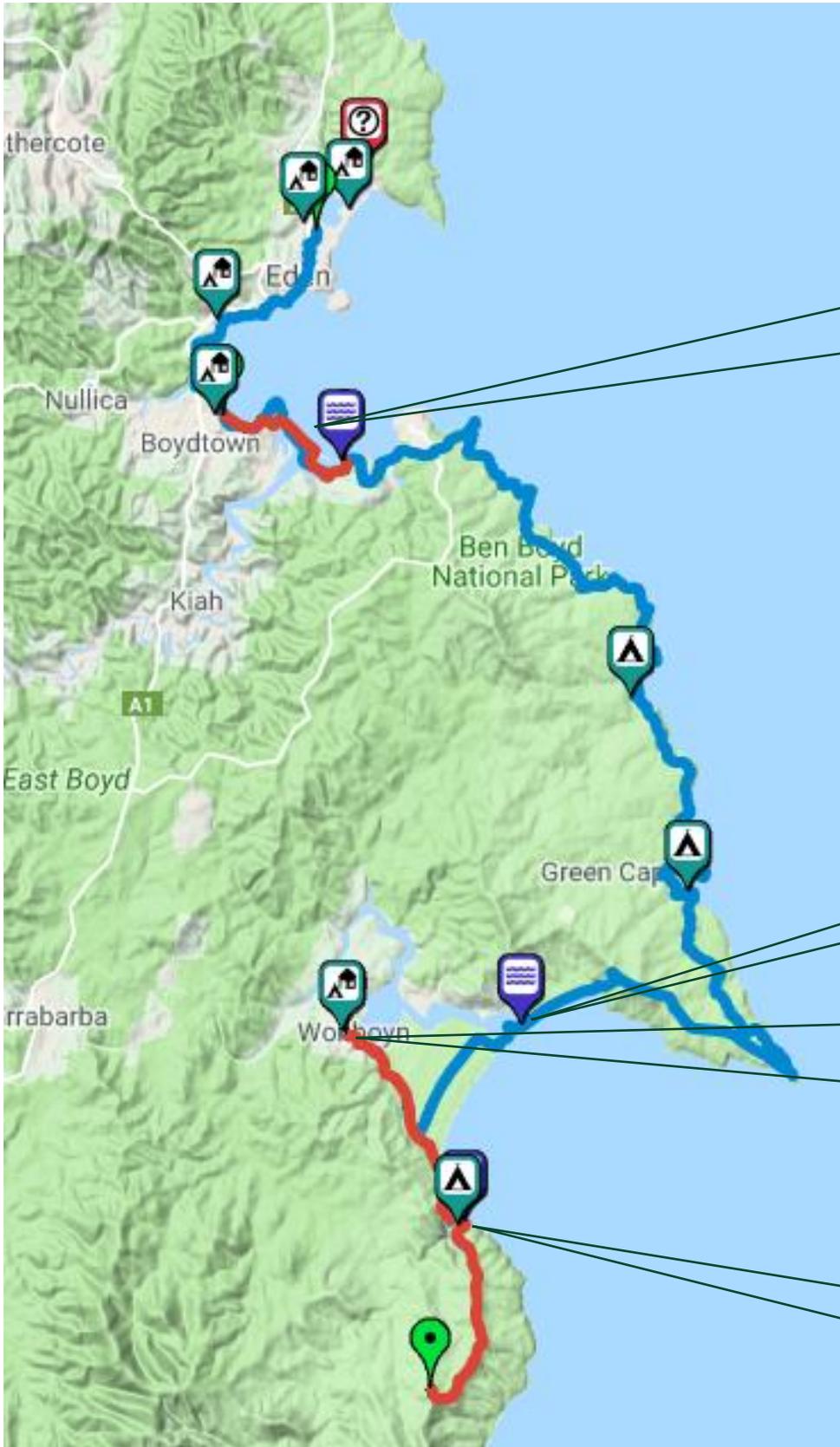
Pambula
Swim at low tide

North of Eden
The final descent from the forestry road to Curalo Lagoon, north of Eden, probably needs checking as there is now a new subdivision on the north side of the lagoon.

Tathra to Eden

Section	Distance	Grade	Accessibility	Managed by	Facilities	Issues / Opportunities
Tathra to Bournda National Park				Bega Valley Council NSW NPWS	Bournda National Park Kangarutha walking track (9 km / grade 3). No camping or other facilities until end of walk at Hobart Beach Campground Ben Boyd National Park Haycock Point walk (3 km / grade 3) no camping facilities.	Pambula Swim at low tide North of Eden The final descent from the forestry road to Curalo Lagoon, north of Eden, probably needs checking as there is now a new subdivision on the north side of the lagoon. Limited accommodation options from Tathra to Tura Beach.

SECTION 10 – EDEN TO WONBOYN (66 KM / 4 DAYS)



The route between Boydtown and the old Davidson Whaling Station need to be clarified.

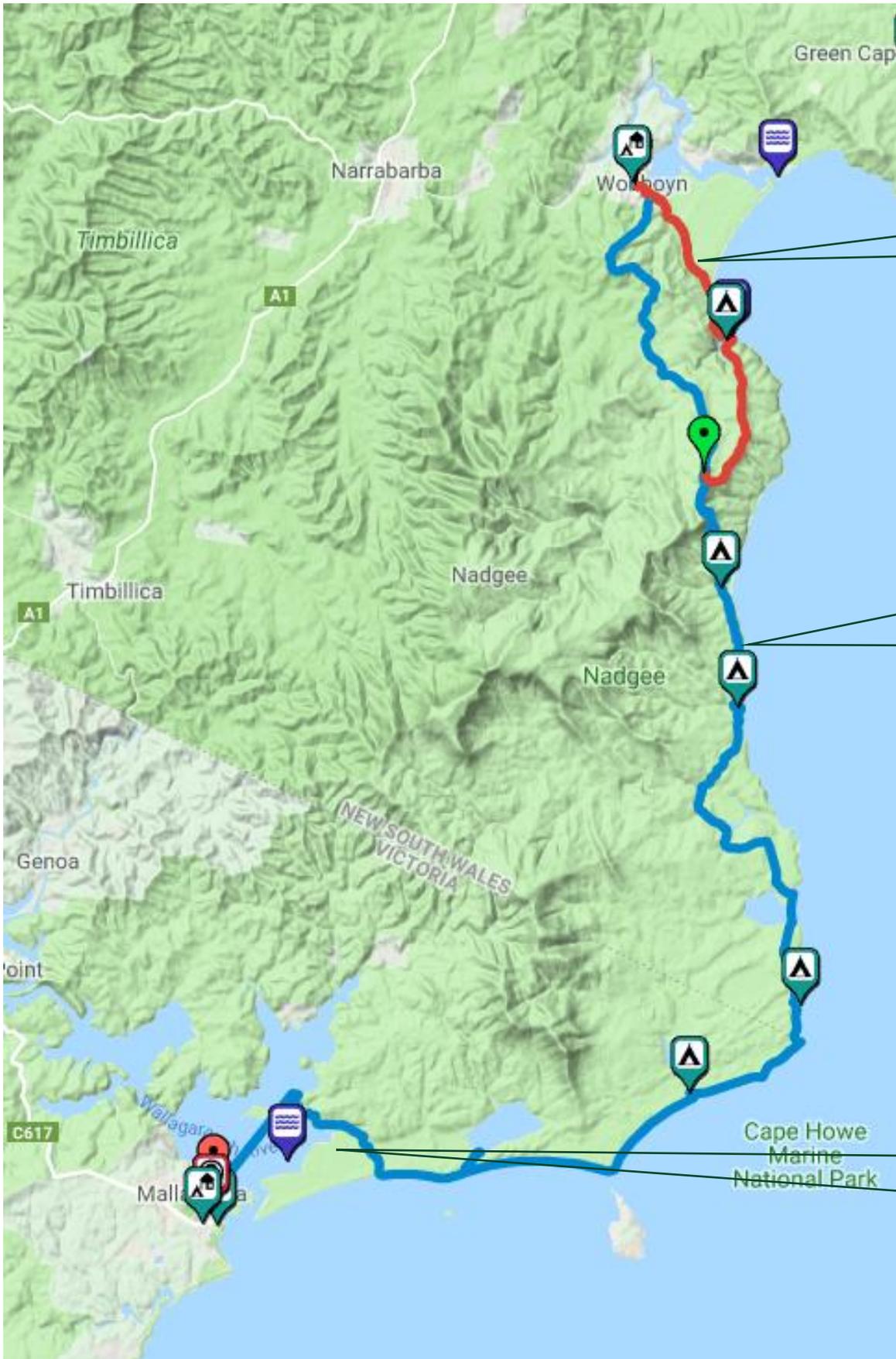
Wonboyn Lake – swim across at low tide

Wonboyn is the last chance for a re-supply before entering the Nadgee Wilderness Area, but if you leave a stash of supplies at Greenglades Beach you could continue down the coast, without visiting Wonboyn.

Merrica River, Swim across at low tide.

Eden to Wonboyn						
Section	Distance	Grade	Accessibility	Managed by	Facilities	Issues / Opportunities
Eden to Ben Boyd National Park				NSW NPWS	<p>Light to Light Walk – 30 km (grade 4).</p> <p>Saltwater Campground</p> <p>Bittangabee Campground picnic tables, non-flush toilets, bbqs.</p>	<p>Before arriving at Ben Boyd National Park, the route between Boydtown and the old Davidson Whaling Station need to be clarified.</p> <p>Need to swim across Wonboyn Lake at low tide</p> <p>From Wonboyn, walk is remote no services, need to swim across Merrica River at low tide.</p>

SECTION 11 – WONBOYN TO MALLACOOTA (63 KM / 3 DAYS)



Inland or coastal route available

Permit required from NSW NPWS for Nadgee Wilderness Walk

Boat trip required to cross Mallacoota Lake

Wonboyn to Mallacoota

Section	Distance	Grade	Accessibility	Managed by	Facilities	Issues / Opportunities
Wonboyn via Nadgee Wilderness Walk		5		NSW NPWS Victoria Parks East Gippsland Shire	Nadgee Nature Reserve - Nadgee Wilderness Walk (55 km, grade 5) No facilities, remote camping, no water.	A permit is required from either NSW Environment and Heritage or Parks Victoria to camp in this region. A boat trip is needed to finish or start the walk at Mallacoota Lake.



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