



# Great South Coast Walk

OPPORTUNITY ANALYSIS | SUMMARY REPORT

November 2019



The Great South Coast Walk Opportunity Analysis, Summary report 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.

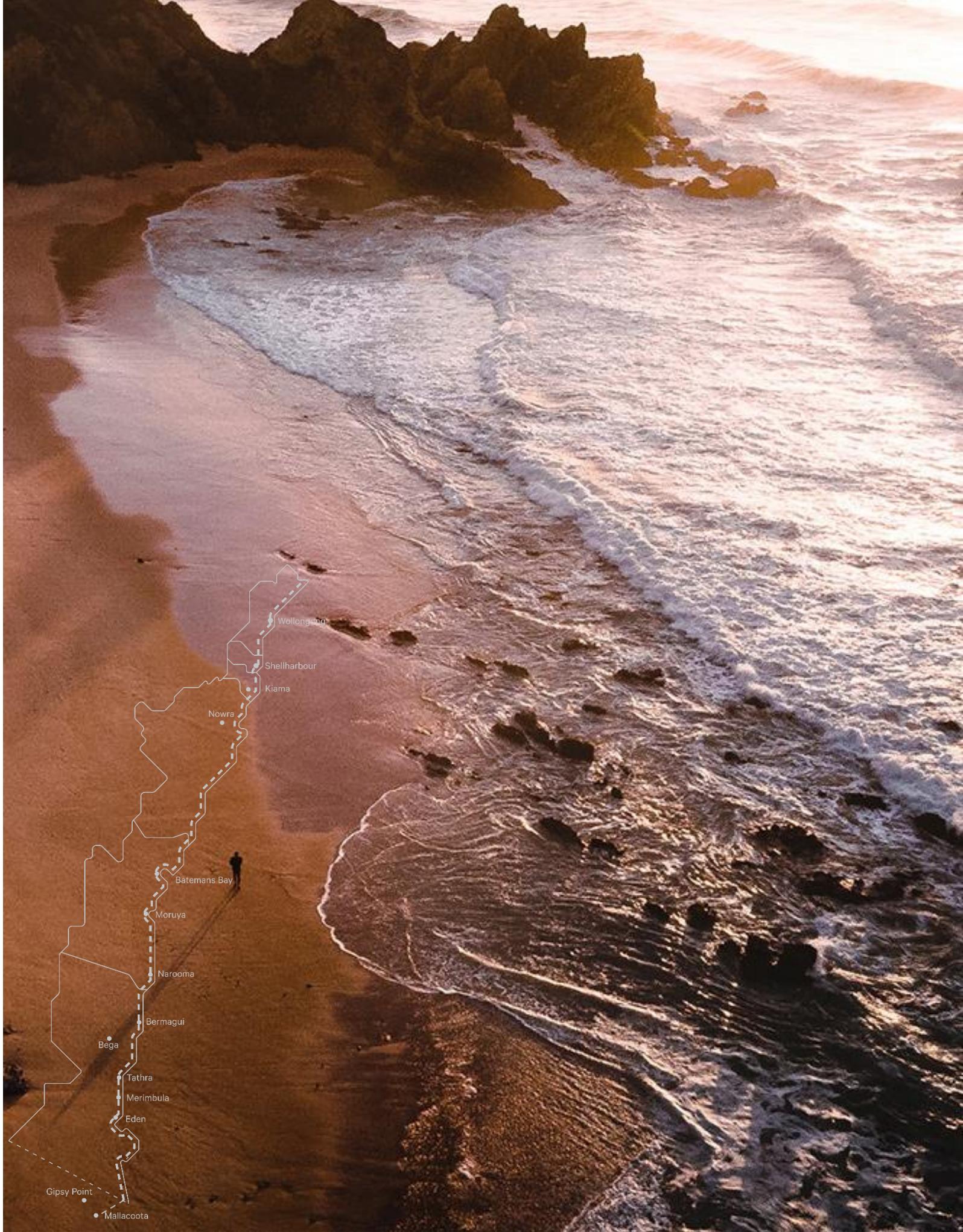
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## Executive Summary

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 concept<sup>1</sup> 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 Walk<sup>2</sup> 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.

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<sup>1</sup> 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.

<sup>2</sup> 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.

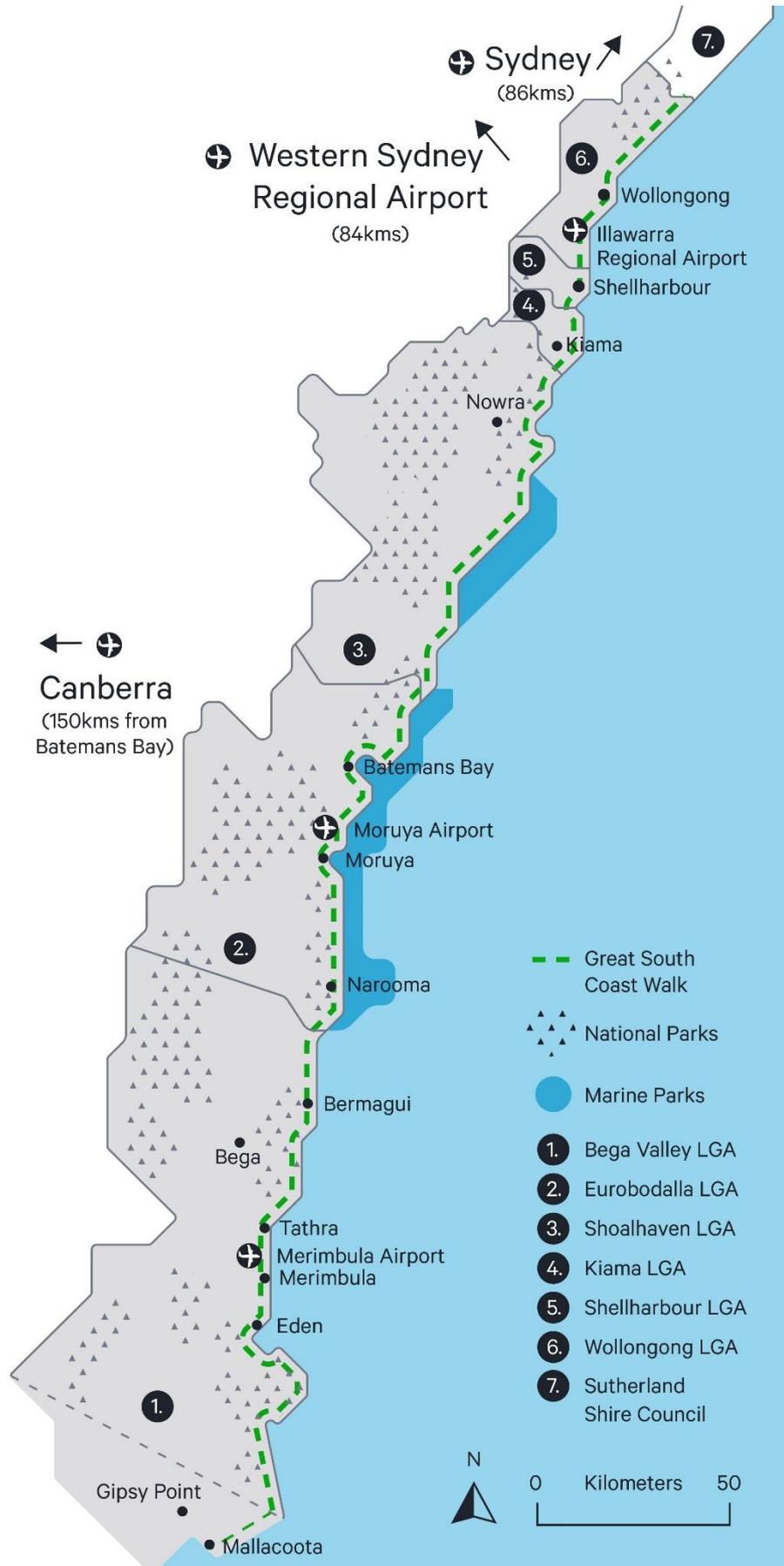
It covers seven local government areas and includes many coastal villages and towns. The walk is currently promoted as an experience that can be completed in eleven sections with each section averaging 60 km.

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
- Many villages and communities with tourism services.



## 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 years<sup>3</sup>.

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.<sup>4</sup> 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.

<sup>3</sup> United Nations World Travel Organisation 2019

<sup>4</sup> Seven Peaks walk is a multi-day walk located on Lord Howe Island

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.

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](http://greatsouthcoastwalk.net.au)) through social media and word of mouth via bushwalking groups and print media<sup>5</sup>.

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

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<sup>5</sup>Time 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

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

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### 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.

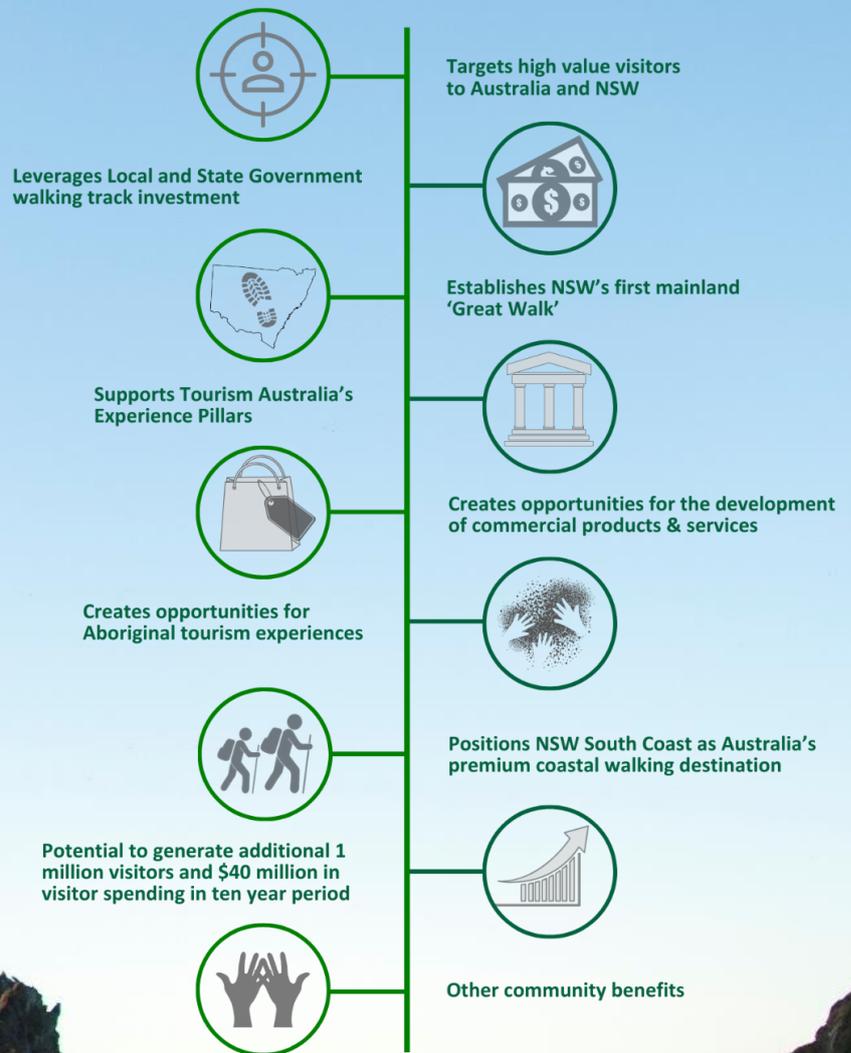
It will be a flexible experience tailored to meet the needs and preferences of different visitors and markets in relation to the overall duration of the experience, the length of daily segments and the location and type of accommodation.

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.

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





## 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 Commercial Tourism Opportunities



Guided day and overnight walking packages

Image credit: Great Walks of Australia

Transport

Baggage transfer

Supporting services for independent walkers - water crossing(s), accommodation, baggage transfer, return transport, maps and guides, food drops

Aboriginal tourism experiences

Walking supplies e.g. maps, map cases, clothing, repellent, blister treatment.

Image credit: Destination NSW

Accommodation

Image credit: Destination NSW

Cafes, restaurants and catering service

Image credit: Destination NSW

Supporting soft adventure activities – canoeing, kayaking, diving, snorkelling, whale watching etc

Image credit: Destination NSW

## 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

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



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