

A regional priority project  
to position NSW South Coast as  
Australia's premier walking destination

*Great South Coast Walks*







This **Great South Coast Walks** document has been prepared by The Destination Agency on behalf of Destination Sydney Surrounds South to support the investment in the **Great South Coast Walks** concept.  
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This **Great South Coast Walks** document is informed by, and contains information direct from, **The Great South Coast Walk Opportunity Analysis** developed by TRC Tourism in November 2019 on behalf of Destination Sydney Surrounds South.  
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# Executive Summary

The **Great South Coast Walks** project is a regional priority project for the NSW and South Coast region.

The walking market is a growth tourism market in Australia with competition between destinations increasing as multi-day infrastructure projects come to fruition and investment in marketing increases.

Southern Australia, Tasmania and Victoria continue to see regional areas benefit greatly from a focus on attracting walkers. New South Wales has been a slow starter in building visitation from the lucrative multi-day walk market.

This domestic walker visitor is a high yield visitor, staying longer and spending more per person per night than the average leisure tourist. Our closest (and Australia's largest) source market is Sydney with more than 50% market share. These walkers are already likely to be visiting other signature walking icons in Australia..

The South Coast NSW has significant natural and geographic advantages for attracting domestic walkers, as well as an established tourism market. This will enable it to quickly enter the market and be competitive when attracting walkers from all categories including multi-day, day and short walks.

The **Great South Coast Walks** concept can focus on leveraging the South Coast's current significant investments in new and improved multi-day walking

experiences. The Light to Light Walk, Murramarang South Coast Walk and Royal Coast Track can become hero multi-day walks for the region. Overall there are over 60 existing short and multi-day walks that exist from Sydney to the Sapphire Coast, with an all-encompassing route that combines all of these walks to create Australia's iconic long-distance coastal walk – The Great South Coast Walk.

Successful positioning of the South Coast as a preferred walking destination for key markets in Sydney, Melbourne and Canberra could see a conservative increase in walking related visitation of 3% per annum, delivering an increase in visitor spend across the South Coast of **\$39 million and the creation of over 500 jobs.**

Investment to position the South Coast as Australia's premier coastal walking destination will also assist the region in ongoing recovery from the devastation of bushfires and COVID-19. The region has by no means recovered and the sugar

fixes of the post COVID-19 travel boom are already dissipating as Australians exit the country to return to their beloved overseas holidays.

South Coast region stakeholders have been successful collaborators over the last decade ensuring investment in the **Great South Coast Walks** concept will be a key driver of visitor growth and economic return that will benefit the region for years to come.

A modest multi-year investment in strong brand positioning, backed with a targeted marketing investment and leveraging the strong relationships across the region, can ensure the South Coast and NSW do not fall behind other Australian regional destinations when it comes to attracting the lucrative walking market.

The **Great South Coast Walks** concept is the third building block in a strategic approach to this visitor market and is informed by previous work in **Great South Coast Walk – Opportunity Analysis**, **Great South Coast Walks** brand positioning and target market

*The opportunity analysis clearly demonstrates 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 Walks** concept. 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 premier coastal walking destination.*





#### ACKNOWLEDGEMENT OF COUNTRY

Destination Sydney Surrounds South and Destination Southern NSW acknowledge and respect Aboriginal people as the state's first people and nations and recognise Aboriginal people as the traditional owners and occupants of the land and waters of NSW



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# Opportunity Analysis\*

**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 paddling. 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 existing road links to major markets including 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 infrastructure has been made by the NSW State Government and local governments in the region in the last few years. This investment includes the establishment or upgrade of the following walks:

- **ROYAL COAST TRACK,** SYDNEY SOUTH
- **GRAND PACIFIC WALK,** WOLLONGONG
- **KIAMA COASTAL WALK,** KIAMA
- **SHOALHAVEN ROUND THE BAY,** SHOALHAVEN
- **MURRAMARANG SOUTH COAST WALK**
- **BINGIE DREAMING TRACK,** TUROSS HEADS
- **LIGHT TO LIGHT,** BEOWA NATIONAL PARK
- **BUNDIAN WAY (Node 1)** BEOWA NATIONAL PARK
- **HEADLANDS WALKING TRAIL** BATEMANS BAY

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.

**Great South Coast Walks** is a concept that connects the many high-quality walking and nature-based experiences that the region has to offer. It links 660 km of walking tracks along the southern coastline of New South Wales, from Bundeena on the southern fringe of Sydney, to Mallacoota in Victoria.

Many of the elements of the **Great South Coast Walks** concept are already in place with well-established and popular walks such as the Royal Coast Track, Kiama Coast Walk, Bingi Dreaming track and the Light to Light walk providing significant parts of the walk, and neighbouring towns providing visitor services.

The opportunity analysis report assessed the potential of the Great South Coast Walk to:

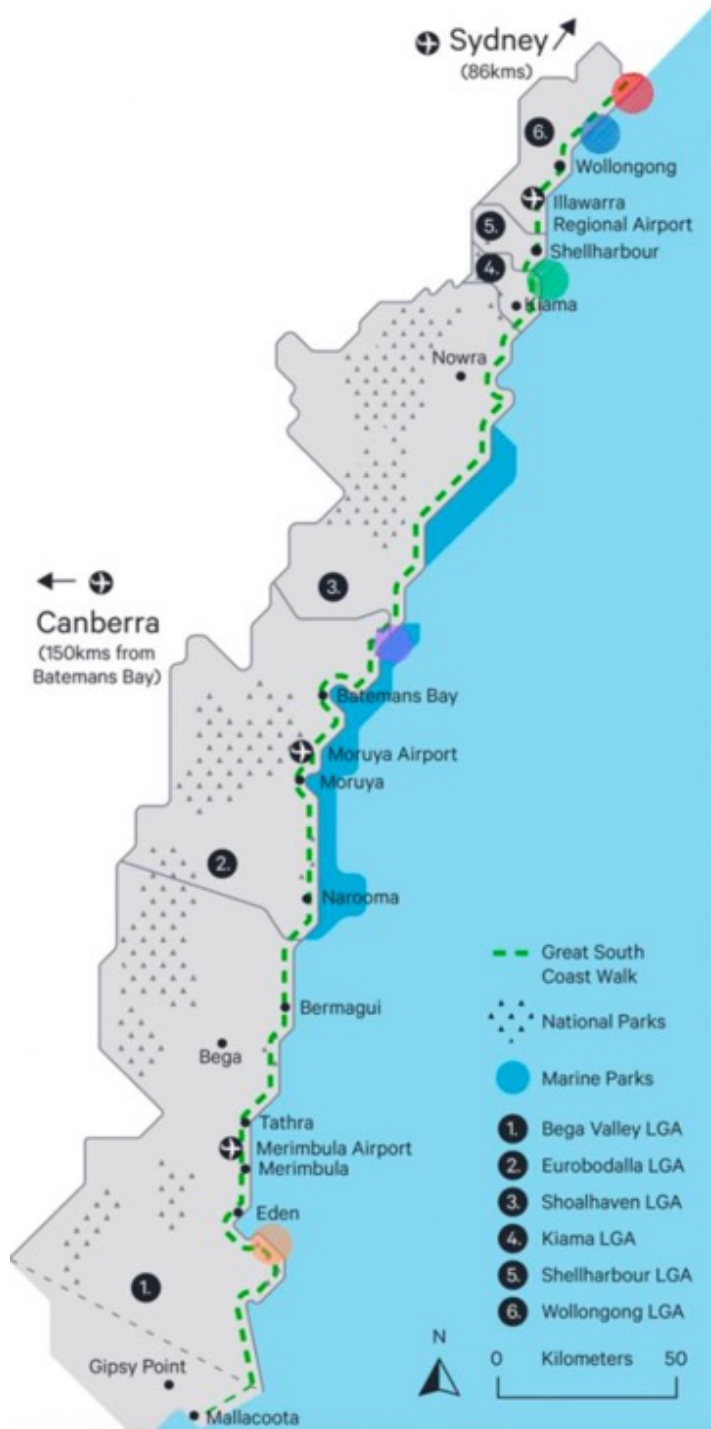
- become the first mainland NSW 'Great Walk' that will appeal to domestic and international visitors
- stimulate low season and mid-week visitation and increase repeat visitation for both domestic and international markets
- increase the average length of stay and overnight expenditure of domestic and 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.



# Great South Coast Walks Signature Experiences

## Great South Coast Walk

*This 660km journey links all the signature walking tracks along the southern coastline of New South Wales, from Bundeena on the southern fringe of Sydney, to Mallacoota in Victoria.*



## Royal Coast Track

### 26km 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 Track

## Grand Pacific Walk

### 60km walk from Royal National Park to Lake Illawarra

*Highlights:* Outstanding coastal and escarpment views supported by quality accommodation and restaurants

*Duration:* 3/4 days

*Extension options:* Kiama Coastal Walk

*Supporting walking experience:* Round the Lake Illawarra (proposed) and Killalea Regional Park

## Kiama Coastal Walk

### 22km walk from Minnamurra River to Gerringong

*Highlights:* Cathedral Rock, Bombo, Kiama Blowhole, rock pools, 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 experience:* Seven Mile Beach (sand), Round the Bay and Hyams Beach Walk, Jervis Bay

## Murramarang South Coast Walk

### 46km adventure traversing the spectacular coastline of Murramarang National Park from Bawley Point to Maloneys Beach

*Highlights:* Wildlife, rock pools and secluded beaches with a backdrop of forested hills and spotted gum canopies dotted by prehistoric Burrawang palms

*Duration:* 3/4 days

*Extension options:* Option to extend the walk to Coastal Headlands Walking Trail – Batemans Bay to Mackenzies Beach (proposed) and Bingi Dreaming Track to Tuross Heads

*Supporting walking experience:* Narrawallee Inlet Walking Track (Ulladulla), Bingi Dreaming Track (Tuross Head) and Headlands Walking Trail.

## Light to Light walk

### 30km coastal walk in Beowa National Park with eco-accommodation in one of the most remote and dramatic settings in Australia

*Highlights:* Heritage lighthouse and accommodation, whale watching, rock pools, hidden beaches, pristine estuaries and coastal wilderness

*Duration:* 3/4 days

*Extension options:* Option to extend the walk to Mallacoota in Victoria via Nadgee Wilderness Walk

*Supporting walking experience:* Bundian Way Story Trail, Bundian Way Node 1, Kangarutha Walking Track, Bournda National Park and Wharf to Wharf Walk



## Demand for walking is on the rise

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

The provision of new guided and accommodated walks is one of the fastest growing products in Australia and overseas.

The South Coast region has over sixty high-quality coastal walks managed by local, state and federal governments.

Leveraging this significant investment in walking track infrastructure presents a significant opportunity for tourism to the region.

The Great South Coast Walk opportunity analysis clearly demonstrates that there is a lucrative opportunity for the NSW South Coast to position itself as Australia's premier coastal walking destination through the development of the **Great South Coast Walks** concept. It has a well-established walking market and well-developed infrastructure to support growth. 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 premier coastal walking destination.

To capitalise on the market growth and existing walking trail investment, the South Coast region needs strong positioning and coordinated marketing to position the South Coast as Australia's premier walking destination:

- Highlighting the 'hero' 660km long distance Great South Coast Walk from Sydney to the Victorian border for the seasoned walker.
- A 'signature' collection of walking experiences 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.
- Packages 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







## Current status

*(Where we are now)*

*South Coast 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 same market
- Competing for same funds
- No distinctive offering
- Offering is diluted competitive market place
- No single portal for information and booking
- No signature experiences that define the region
- Visitors choose 'easier and bookable options' e.g. 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 Walks**
- 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 experiences
- 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 and 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 **Great South Coast Walks**



# Opportunity health check

## SWOT analysis

### STRENGTHS

- History of successful collaboration across LGAs
- Supporting Investment in Murramarang South Coast Walk, light to light, Royal Coastal Walk and Bundian Way (node 1)
- Walking is a growing visitor sector
- Unique brand positioning
- Diversity of landscape
- Existing high visitor numbers and nature brand
- National appeal of Light to Light as first hut to hut walk in NSW National Park
- Strong nature-based conic experiences including whale watching, rock pools, coastal walking trails, diving, surfing and adventure
- Well located to source markets of Canberra and Sydney
- Existing depth of quality tourism experiences

### WEAKNESSES

- Low 'Iconic Walks' brand awareness in sector
- Immature international and trade-ready industry
- Lack of packaged destinations/products/experiences – not well linked
- Recovering industry – lack of willingness to invest
- Multi-year timeline to prove success
- Lack of compelling data to prove success
- International outbound travel increasing share of high-yield traveller
- Limited trading hours and lack of evening activities hampers overnight visitor market growth
- Digital connectivity black spots in parts of the region

### OPPORTUNITIES

- Stimulate experience development in region
- Assist in bushfire and COVID-19 recovery
- Encourage packaging and collaboration across industry
- Improvement in health and wellbeing sector experiences
- Continue to grow high-yield Sydney market for southern LGAs
- Position industry for the return of international nature-based travel
- Promote Indigenous experience development and industry partnerships
- Promote visitor economy-friendly planning regulations
- Build on emerging Aboriginal tourism experiences
- Building connectivity between accommodation and other visitor economy products

### THREATS

- Building a sustainable investment support model
- Ongoing disruption from COVID-19
- Natural disasters
- Staffing availability and skill
- Quality of experience delivery with low investment
- Climate change and natural disasters impacting the region
- Challenges within local planning frameworks making it hard to grow the value of the visitor economy
- Change of government influencing direction of tourism policy
- Community concern about infrastructure investment in National Parks







## Economic and social opportunity

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 Walks** concept has great potential to boost the regional economy and generate business opportunities and jobs, if they are developed into quality, well-marketed tourism experiences.

In 2019, Sydney, Regional NSW, Melbourne and Canberra markets generated \$8.02 million in overnight trips that included bushwalking as an activity. For Sydney, Regional NSW and Melbourne, bushwalking was the 7th most popular trip activity in a

list of over 40 activities monitored in the National Visitor Survey. This market size and popularity has been growing consistently. Over the period 2015–2019, the Sydney, Regional NSW and Melbourne markets grew at an average annual compounding rate of over 10%.

Successful positioning of the South Coast as a preferred walking destination for key markets in Sydney, Melbourne and Canberra could see a conservative increase in walking related visitation of 3% per annum, deliver an increase in visitor spend across the South Coast of \$39 million, and generate up to 500 new jobs.

500

Jobs



39 million

## Visitor spend

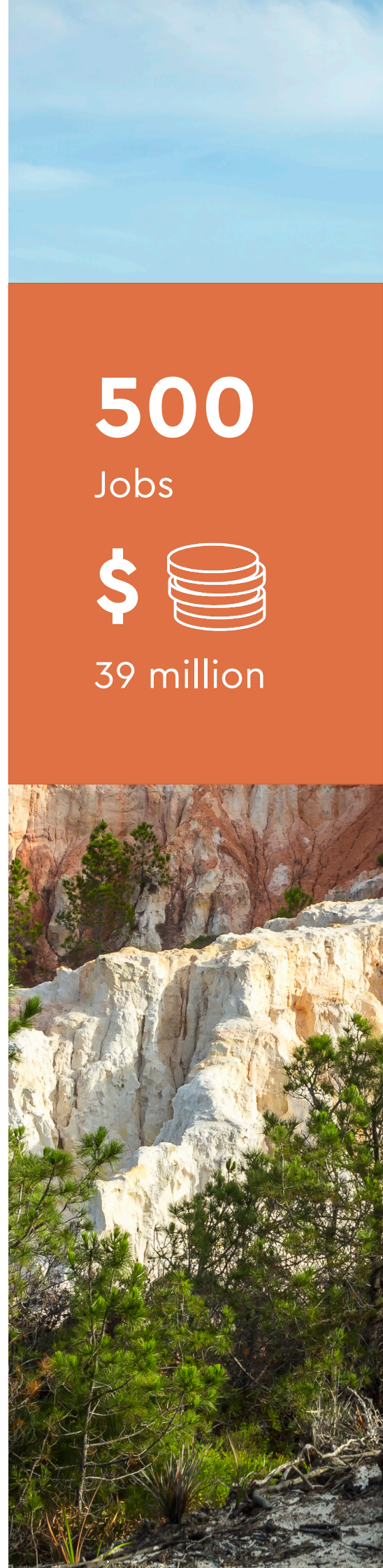
The walker market presents a high-yield opportunity with the market staying, on average, 19% longer than the non-walking market.

Other market spend characteristics included:

- **12%** higher spend per trip on average than non-bushwalkers
- **15%** more per trip on groceries for self-catering
- **12%** more per trip on alcohol/drinks
- **8%** more per trip on restaurant meals/takeaways etc.
- For a large majority, trips that included bushwalking are single stopover trips (i.e. visitors 'base' themselves in one location)

Increased visitation and expenditure in the region as a result of the **Great South Coast Walks** concept will benefit existing operators and attract further investment from the private sector to develop products and services to meet the needs of a growing visitor market.

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









## 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 10 years with the development of **Great South Coast Walks** concept.

Growth Projections – Great South Coast Walks – Total Walkers

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

Growth Projections – Great South Coast Walks – 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	
<b>Increase</b>		<b>16,948</b>	<b>17,117</b>	<b>17,288</b>	<b>17,461</b>	<b>17,636</b>	<b>17,812</b>	<b>17,990</b>	<b>18,170</b>	<b>18,352</b>	<b>18,535</b>	<b>177,309</b>
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	
<b>Increase</b>		<b>50,843</b>	<b>52,368</b>	<b>53,939</b>	<b>55,557</b>	<b>57,224</b>	<b>58,941</b>	<b>60,709</b>	<b>62,530</b>	<b>64,406</b>	<b>66,338</b>	<b>582,855</b>
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	
<b>Increase</b>		<b>84,738</b>	<b>88,975</b>	<b>93,424</b>	<b>98,095</b>	<b>102,999</b>	<b>108,149</b>	<b>113,557</b>	<b>119,235</b>	<b>125,196</b>	<b>131,456</b>	<b>1,065,824</b>



# Walker spending – LGA

The following table 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.

Great South Coast Walks – Expenditure in Local Government Areas

SUMMARY   SPENDING BY WALKERS - 3% Annual Growth											
LGA	YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5	YEAR 6	YEAR 7	YEAR 8	YEAR 9	YEAR 10	Total Increase 10 years
Wollongong											
2018 spend	\$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
											\$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
Shellharbour											
2018 spend	\$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	
											\$5,703,411
Increase	\$171,102	\$176,235	\$181,522	\$186,968	\$192,577	\$198,354	\$204,305	\$210,434	\$216,747	\$223,250	\$1,961,496
Kiama											
2018 spend	\$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
											\$13,223,162
Increase	\$396,695	\$408,596	\$420,854	\$433,479	\$446,484	\$459,878	\$473,674	\$487,885	\$502,521	\$517,597	\$4,547,662
Shoalhaven											
2018 spend	\$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	
											\$31,277,048
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
Eurobodalla											
2018 spend	\$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	
											\$14,334,714
Increase	\$430,041	\$442,943	\$456,231	\$469,918	\$484,015	\$498,536	\$513,492	\$528,897	\$544,764	\$561,107	\$4,929,943
Bega											
2018 spend	\$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	
											\$10,469,485
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											
	\$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	
											\$115,921,469
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

# Market positioning

## Why we will be unique

Achieving the right market positioning for **Great South Coast Walks** will be the key to its success.

Currently, key competitors in the walking market tend to be iconic walking destinations and individual signature walks.

Tasmania stands out as the premier walking brand in Australia with its rich array of multi-day walks supported by strong food and wine offerings, incredible landscapes and large destination branding investment. For the most part, the iconic multi-day walks and high profile walking destinations around Australia tend to rely on an epic landscape and the provision of on-walk experiences.

The **Great South Coast Walks** concept can be uniquely positioned as a collection of iconic walking experiences, with comparable landscape backdrops to competitors but the advantage of well-established visitor experiences in the towns and villages adjacent to the walks. This advantage will enable compelling visitor connections with local characters through existing tourism experiences in the food and wine, nature, health and wellbeing and cultural sectors.

A **Great South Coast Walks** experience is also uniquely accessible to visitors from our largest visitor markets of Sydney, Melbourne and Canberra.

**Great South Coast Walks** 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 coastal environments on the east coast of Australia, scenery, wildlife and unspoilt beaches
- Outstanding marine life viewing opportunities
- Opportunities for integrated land and marine experiences
- Opportunities for cultural experiences – connection with Aboriginal people and culture
- Range of 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

Why a **Great South**

01

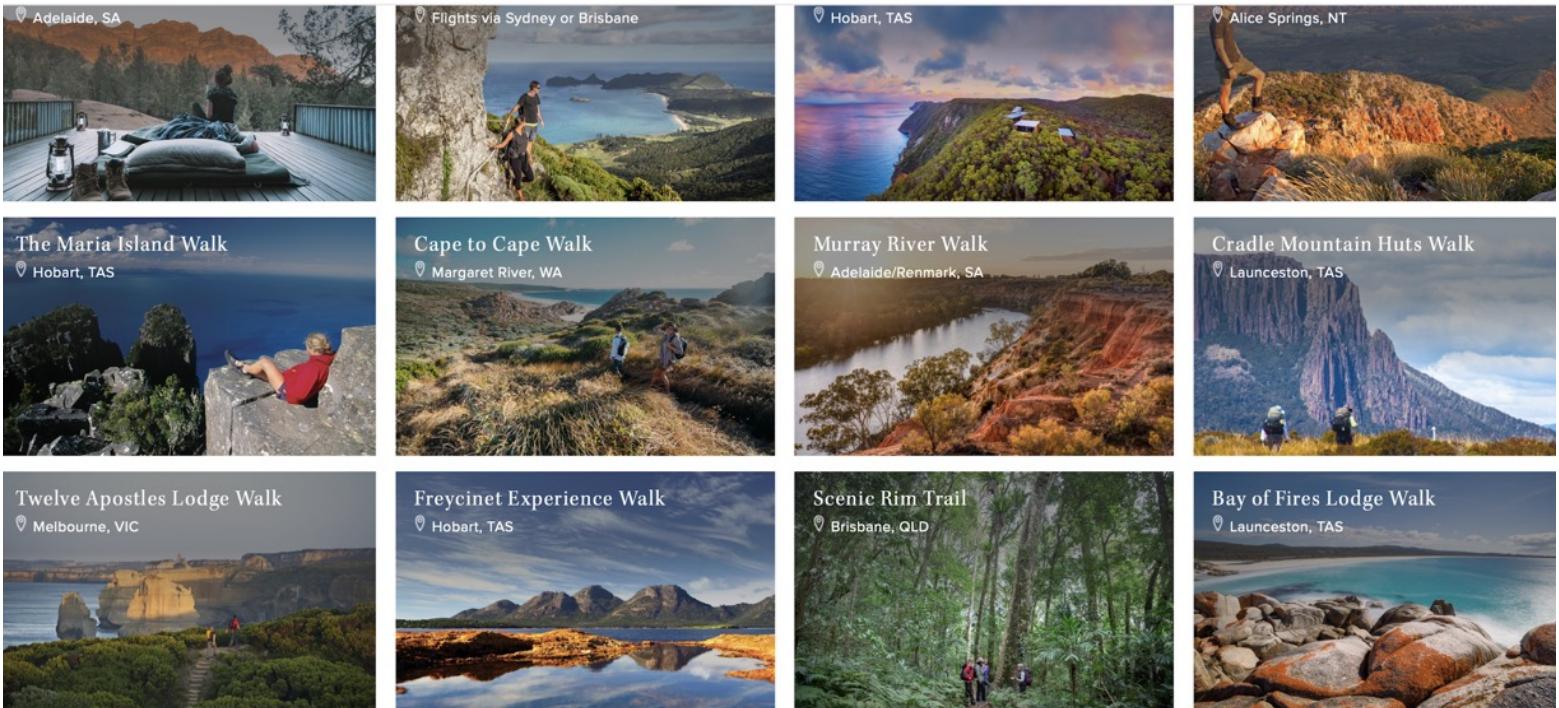
Diverse  
landscapes in a  
snack

Coast and estuary

Rainforest and mountains

Secluded beaches and  
pristine environment





Signature walks in Australia tend to rely on brands built around epic landscapes and on-walk experiences

**Coast Walks** *experience is different*

02

Drive location for major markets

Right on the doorstep of Australia's biggest visitor source markets

Perfect for the snack traveller

Low cost to visit

03

Always unexplored

Multitude of day walks, short walks, overnight walks and signature experiences

Over 60 compelling walking experiences

Range of spend options

04

Connecting with locals

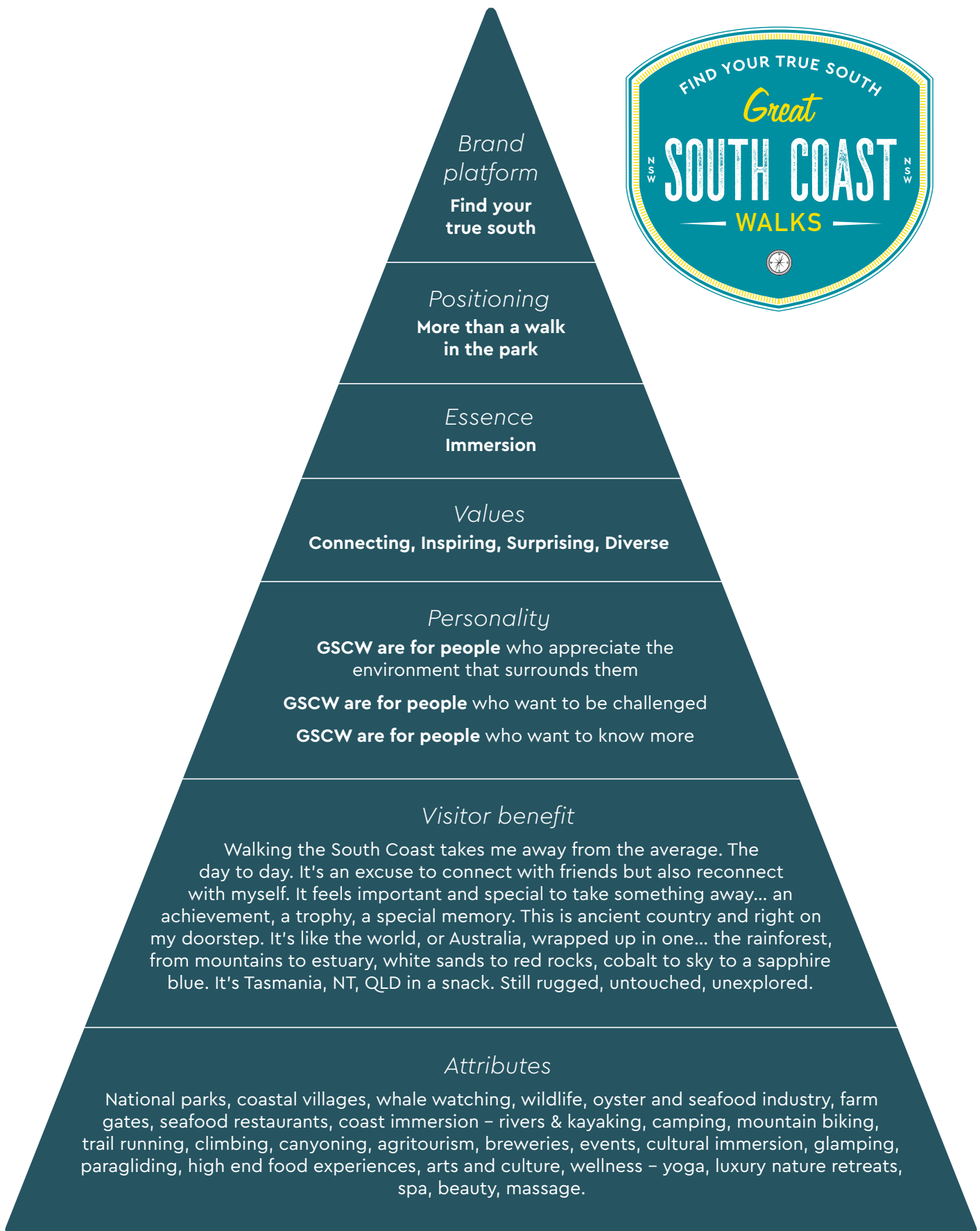
Established tourism experiences

Surrounded by makers, grower, artisans

Cultural experiences

Huge range of accommodation

# GSCW brand positioning





# FIND YOUR TRUE SOUTH



Explore pristine coast by day and local stories by night on the Light to Light walk

Take a walk on the wild side on the South Coast. Explore white sands and red rocks, cobalt skies and an untamed sapphire blue sea. Savour the south in our starry night skies, homegrown fare and locals with a story to tell.

Find your true south on the South Coast.

[greatsouthcoastwalks.com.au](https://greatsouthcoastwalks.com.au) @gscwalks





# Market profiles

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## Introduction

The **Great South Coast Walks** target market has been divided into two sets prioritising psychographic attributes to inform marketing and media planning.

The **Trail Blazers** represent a younger demographic seeking unique experiences and would be considered a high yield market.

**Trail Blazers** also represent a great opportunity for repeat visitation value for both walking and other leisure experiences. Signature walks can be a compelling reason to connect with a new and enduring market.

Bundling of unique immersive South Coast experiences with nature-based walking will be important to ensuring this visitor market has an experience worthy of sharing and encouraging peer travelling.

The **Toe Tappers** represent a more mature market by age and financial resources. Importantly, this market is defined by their ability to spend money in the towns and villages on dining, culture and wellbeing experiences. They will travel in groups and will be highly valuable in spreading word-of-mouth marketing in their social networks and encouraging further visitation.

*Signature walks will be a **compelling reason** to connect with a new and enduring visitor markets.*

## Preferred market attributes

01

### Growth

Growth inclined market size  
Return visitors  
Early in their walking journey

02

### Access

Sydney and region  
Drive  
Domestic & International

03

### High Yield

Overnight stays  
Experience seekers  
'Adderonnereers'







# Target market

The project should seek to engage media planning expertise to further develop campaign target markets as informed by available budgets.

Sydney and ACT markets have been identified as primary geographic source markets due to ACT's likely preference to pursue nature-based activities and location to experiences and Sydney as a major volume source market well located to the walking experiences.



## 01 Trail Blazers

Walking IS why I travel

About me	Product alignment
Action Walker	GREAT SOUTH COAST WALK (660KM)
Nature Walker	ROYAL COAST TRACK (26KM)
Instagram Walker	LIGHT TO LIGHT WALK (30KM)
I crave a challenge	MURRAMARANG SOUTH COAST WALK (35KM)
Breaks up my regular 9–5 grind	BINGI DREAMING TRACK (13.5KM)
Seeking mindfulness	GRAND PACIFIC WALK (60KM)
Experience Seeker	KIAMA COAST WALK (20KM)
OS traveller	WHARF TO WHARF WALK (27KM)
Young Professional Couple	GULAGA MOUNTAIN WALK (14KM)
	BUNDIAN WAY (35KM)
Market attributes	

Sydney, Southern NSW, ACT region  
25–45 years old, millennial and generation y  
**Total source market** – 4+ million (Sydney, Southern NSW, ACT region)

Return visitors  
High yield  
Large social network  
Customers for life





02

## Toe Tappers

Walking CAN be why I travel

### About me

Soft Adventure Walkers  
Guided Walkers  
Social Walkers  
Wine and Cheese Walkers  
I am slowly ticking off the multi-day luxury iconic walks  
I crave a premium, exclusive experience.  
Cashed Up  
Getting away with the girls

### Product alignment

**GREAT SOUTH COAST WALK (660KM)**  
**ROYAL COAST TRACK (26KM)**  
**LIGHT TO LIGHT WALK (30KM)**  
**MURRAMARANG SOUTH COAST WALK (48KM)**  
**BINGI DREAMING TRACK (13.5KM)**  
**GRAND PACIFIC WALK (60KM)**  
**KIAMA COAST WALK (20KM)**  
**WHARF TO WHARF WALK (27KM)**  
**GULAGA MOUNTAIN WALK (14KM)**  
**BUNDIAN WAY (35KM)**

### Market attributes

Sydney, Southern NSW, ACT region  
45 – 60 years old, female  
**Total source market** – 2.5+ million (Sydney, Southern NSW, ACT region)

Group travel  
Large social network  
High yield  
Return visitors  
Good knowledge of South Coast



# Experience development and partnerships

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The **Great South Coast Walks** concept will connect signature walks to existing tourism experiences on the South Coast.

Existing industry will be encouraged to partner with walking operators, connect to collaborative marketing activity and content, and further develop immersive, nature, culture, food and wine, health and wellbeing experiences to support the growing walking market.

The **Great South Coast Walks** concept will develop marketing support material for industry in order to promote collaborative marketing and industry development opportunities, and guide industry in identifying opportunities in the walking market on the South Coast.

## Partnership opportunities





## Experience development, packaging and delivery priorities

### Trail Blazers



Mountain biking  
Trail running  
Climbing, canyoning,  
slacklining  
Whale watching  
Agritourism  
Breweries/distilleries  
Events  
Cultural immersion  
Glamping  
Paragliding  
Surfing

### Toe Tappers



Paddling  
High-end food experiences  
Whale watching  
Arts and culture  
Agritourism  
Breweries/distilleries  
Glamping  
Yoga  
Luxury nature retreats  
Spa, beauty, massage  
Cultural immersion

# Marketing

Strategic destination branding will underpin the success of positioning **Great South Coast Walks** as Australia’s premier coastal walking destination.

Modern destination marketing principles require identification of a unique marketing position, accompanied by strong branding and positive industry engagement. These factors will drive critical word-of-mouth impact.

The proven and powerful collaboration and support amongst the South Coast LGAs will build awareness of campaign key messaging and ensure success of owned and earned media opportunities across the whole South Coast are leveraged.

A number of important milestones have already been completed in the *Great South Coast Walk Project – Opportunity Analysis and Target market identification and branding work*. This work will inform the activation of marketing activity.

The following marketing recommendations will form the basis for future investment levels.

## Where we will focus in the visitor journey

Dream	Plan	Book	Experience	Share
Inspiration to visit	Logistics Options	E-commerce	Value adds In location experiences	Drive WOM Connect with networks Build GSCW community
Priority function	Function of land managers/industry	Direct with operators/land managers/industry	Shared function with destination marketers	Priority function



## Strategic marketing pillars

### Advocacy

**Great South Coast Walks** stakeholders will advocate for investment in the continued improvement and promotion of walking experiences and tourism product/experience delivery.

South Coast partners to promote the whole **Great South Coast Walks** experience.

Advocacy to industry and partners to leverage **Great South Coast Walks** initiatives including promotion or industry development.

### Content and community

Development of a baseline library of compelling strategic marketing assets including photography and video, itineraries and blogs to enable industry and partners to support promotion and brand positioning.

Develop and promote **Great South Coast Walks** industry toolkit to enable amplification among strategic industry partners.

### Cooperative marketing

Align campaign delivery to Feel NSW brand campaign opportunities.

Raise investment to build owned marketing assets and implement paid marketing campaigns into key markets.

Invest in collaborative marketing and demand funding opportunities.

Leverage existing brand work and marketing planning to penetrate Sydney market and build awareness of **Great South Coast Walks** experiences.

### Experience development

Use **Great South Coast Walks** brand as a catalyst to drive walk-related product development across South Coast industry, encouraging improved experience delivery, partnerships and new products.







## Achievements so far

# 01

## Opportunity analysis

### Outline

Review of opportunity, competitors

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.

### Status

Complete

### Who

DSSS & DSNSW

# 02

## Stakeholder engagement

### Outline

Opportunity analysis review and brand development.

### Status

Complete

### Who

DSSS & DSNSW

# 03

## Brand development

### Outline

The brand identity and related work to underpin the success of the GSCW and position the South Coast as Australia's premier coastal walking destination.

### Status

Complete

### Who

DSSS & DSNSW

# 04

## Marketing action plan

### Outline

Cross LGA collaboration and support for investment.

### Status

Complete

### Who

DSSS & DSNSW

# Marketing activation

## Year one *set up*

Action	Outline	Budget	Timing
Develop content assets	<ul style="list-style-type: none"> <li>• Explore content/trail digital partnership with Destination NSW</li> <li>• Video and photography production (signature walks)</li> <li>• Source experience related content from LGAs, STO</li> <li>• Subscribe partner accessible reporting platform</li> <li>• Itinerary development</li> <li>• Produce hero video series</li> <li>• Build industry accessible image library</li> </ul>		12 weeks
Website	<p><a href="https://greatsouthcoastwalks.com.au">greatsouthcoastwalks.com.au</a></p> <ul style="list-style-type: none"> <li>• Develop website to cater for inspiration phase website to motivate further trip planning</li> </ul>		12 weeks
Social media suite	<ul style="list-style-type: none"> <li>• Secure preferred social media handles</li> <li>• Develop content strategy and implementation plan</li> </ul>		12 weeks
Partner toolkit	<ul style="list-style-type: none"> <li>• Develop digital partner (industry/LGAs/DN) toolkit with key messaging, media and content plans, image library</li> </ul>		12 weeks
Engage media buying agency	<ul style="list-style-type: none"> <li>• Develop multi-year paid media strategy</li> </ul>		12 weeks
Year one <i>set up</i>		\$80,000	12 weeks



## Year one *implementation*

Action	Outline	Budget	Timing
Organic social	<ul style="list-style-type: none"> <li>• Activate content plan</li> <li>• Community (user) engagement</li> <li>• Partner engagement</li> </ul>	Agency Resource	Annual
Earned publicity	<ul style="list-style-type: none"> <li>• Pitch media famils (seasonally)</li> <li>• Manage media enquiries</li> </ul>	Agency Resource	Seasonal pitching
Paid publicity	<ul style="list-style-type: none"> <li>• Hosting paid famils</li> <li>• Influencer/content creator famils</li> </ul>		Seasonal
Digital (paid)	<ul style="list-style-type: none"> <li>• Google search and display advertising</li> </ul>		Shoulder seasons
Social (paid)	<ul style="list-style-type: none"> <li>• Social channel paid campaigns</li> </ul>		Shoulder seasons
Year one <i>implementation</i>		\$120,000	

## Year two *implementation*

Action	Outline	Budget	Timing
Organic social	<ul style="list-style-type: none"> <li>• Activate content plan</li> <li>• Community (user) engagement</li> <li>• Partner engagement</li> </ul>	Agency Resource	Annual
Earned publicity	<ul style="list-style-type: none"> <li>• Pitch media famils (seasonally)</li> <li>• Manage media enquiries</li> </ul>	Agency Resource	Seasonal pitching
Paid publicity	<ul style="list-style-type: none"> <li>• Hosting paid famils</li> <li>• Influencer/content creator famils</li> </ul>		Seasonal
Digital (paid)	<ul style="list-style-type: none"> <li>• Google search and display advertising</li> </ul>		Shoulder seasons
Social (paid)	<ul style="list-style-type: none"> <li>• Social channel paid campaigns</li> </ul>		Shoulder seasons
Other media spend	<ul style="list-style-type: none"> <li>• TBA</li> </ul>		Shoulder seasons
Year two <i>implementation</i>		\$200,00	



## Year three *implementation*

Action	Outline	Budget	Timing
Organic social	<ul style="list-style-type: none"> <li>• Activate content plan</li> <li>• Community (user) engagement</li> <li>• Partner engagement</li> </ul>	Agency Resource	Annual
Earned publicity	<ul style="list-style-type: none"> <li>• Pitch media famils (seasonally)</li> <li>• Manage media enquiries</li> </ul>	Agency Resource	Seasonal pitching
Paid publicity	<ul style="list-style-type: none"> <li>• Hosting paid famils</li> <li>• Influencer/content creator famils</li> </ul>		Seasonal
Digital (paid)	<ul style="list-style-type: none"> <li>• Google search and display advertising</li> </ul>		Shoulder seasons
Social (paid)	<ul style="list-style-type: none"> <li>• Social channel paid campaigns</li> </ul>		Shoulder seasons
Other media spend	<ul style="list-style-type: none"> <li>• TBA</li> </ul>		Shoulder seasons
Year three <i>implementation</i>		\$200,00	

# Management framework

## Consultation

Extensive stakeholder consultation has demonstrated strong support for establishing the South Coast as Australia's premier coastal walking destination.

Local government areas of Wollongong, Shellharbour, Kiama, Shoalhaven, Eurobodalla and Bega Valley (Sapphire Coast) all indicated a willingness to support the initiatives.

All participants were provided the background opportunity analysis and project briefing material with discussion focused on the level of interest from stakeholders to work towards the shared vision, branding and marketing strategy to position the NSW South Coast as Australia's premier coastal walking destination through the development of the **Great South Coast Walks** concept.

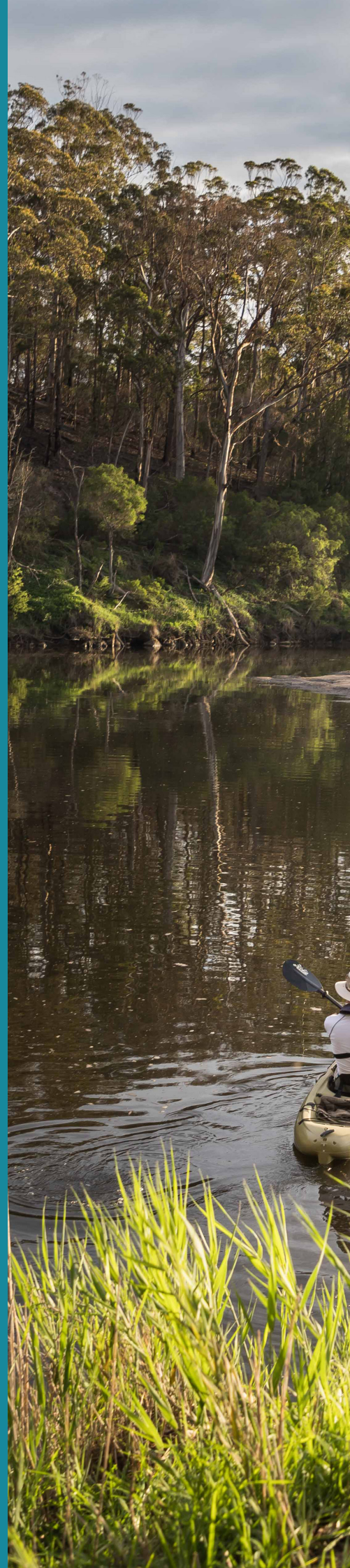
Feedback from consultation indicated a simplistic marketing model, where investment was raised on behalf of the stakeholders, to implement the plan with an outsourced marketing agency model. Either Destination Network stakeholders or LGA's could share the responsibility of managing a multi-year agency contract output and reporting.

Characteristics to ensure success and ongoing support included;

- The project should remain clearly focused on the

'visitor economy' marketing opportunity, as this remit sits squarely within each LGA's wheelhouse.

- Focus on existing signature experiences and avoiding walk development/infrastructure challenges.
- Careful crafting of the market positioning and brand must ensure we encourage a higher yield overnight visitor to the South Coast region.
- Any plans should be multi-year and well-funded, and should engage professionals to deliver to agreed plans.
- Importantly, complex IP considerations can be avoided in this project given it is a collaborative marketing initiative. The South Coast LGAs have a long and successful history of marketing collaborations. Historically, these collaborations have been supported by informal agreements, or simple MOUs, between councils. In some cases, one council may be required to take a lead role and this could be rotated amongst councils should the project be successful and ongoing.
- Care should also be taken to develop plans that minimise the draw this project has on LGA tourism staff time.







## Partnerships and roles

TOURISM AUSTRALIA



Promote Australia's walking experiences to the world. Partner for Walk Operators to promote to global tourism trade



**Destination  
NSW**

Promote NSW walking experiences to domestic and international market. Support walks related experience development and industry skills through programs. Partner opportunity for including **Great South Coast Walks** content trails and itineraries in marketing channels

### DESTINATION NETWORKS

Advocate for **Great South Coast Walks** initiatives and funding in its stakeholder engagement. Prioritise future investment in supporting **Great South Coast Walks** vision.

### LOCAL GOVERNMENT/LTOS

Promote **Great South Coast Walks** content, experiences and itineraries in marketing channels. Provide stewardship for continued investment in **Great South Coast Walks** brand and marketing delivery

### TOURISM INDUSTRY

Rally behind and amplify **Great South Coast Walks** brand, content and marketing program. Integrate walking experiences in product delivery. Encourage visitors to participate in **Great South Coast Walks** experiences.

## Project management

### *Key stakeholders*

South Coast LGAs  
Southern Destination Networks  
- DSSS/DSNSW  
NSW National Parks  
Destination NSW

### *Project managers*

South Coast LGAs  
Southern Destination Networks  
- DSSS/DSNSW

### *Agency suppliers*

Engage agency on multi-year management contract  
Rotate shared responsibility for agency performance and reporting amongst LGAs or DN  
6 monthly LGA/DN meetings  
6 monthly Agency reporting  
Permanent reporting dashboard

### *Reporting process*

Quarterly reports to Project Managers representative  
6 monthly Agency reporting  
Permanent reporting dashboard

## Reporting

<i>Key performance indicator</i>	<i>Measurement</i>
Increase visitor expenditure	Annual review of TRA data
Increase bushwalking participation	Annual review of TRA data
Increase walking related partnership	LGA/DN reviews
Increase walking experiences	Annual ATDW data
Digital engagement	Quarterly data reviews
Content development	



# Budgeting

The **Great South Coast Walks** concept will require well-funded, multi-year approach to marketing implementation investment.

A minimum of three years should be sought at commencement to allow time for the strategies to take effect, and for the awareness activities to have an impact in the market.

The marketing activation identifies a small minimum investment of \$200,000 per annum committed for over 3 years.

Successful implementation should enable a de-scaling of investment in subsequent years amplifying the long term ROI as the brand builds and becomes integrated in partner marketing and programs

A multi-year investment will also allow time to activate partnership activities with local government destination managers, NSW National Parks and wider tourism industry.

A key objective of a multi-year investment strategy would be to clearly demonstrate the return on investment and

encourage partners to continue to support the ongoing vision to position South Coast NSW as Australia's premier coastal walking destination.

The following return on investment scenario represents a conservative investment and uses the modest forecast visitor numbers to demonstrate that success will result in a high return to the visitor economy with benefits continuing to compound into the future as the South Coast becomes known as a premier walking destination.

## Return on investment

The following table demonstrates significant return on investment at conservative assumptions. Assumption is that 25% of the visitor spend is as a result of promotion, associated word-of-mouth and partnership activity. The increase is based on the conservative 3 % annual growth rate projected earlier. An minimum estimated 7 times ROI is predicted over 10 years.

<i>Period</i>	<i>Marketing investment</i>	<i>Additional visitor spend at 3% increase</i>	<i>Additional visitor spend ASSUMPTION attributable to marketing (25%)</i>	<i>Return on marketing investment</i>
Year 1	\$200,000	3,477,644.00	869,411.00	4x
Year 2	\$200,000	3,581,973.00	895,493.25	4x
Year 3	\$200,000	3,689,433.00	922,358.25	4x
Year 4–10 \$100,00 PA	\$700,000	29,118,242.00	7,279,560.50	10x
<b>Total</b>	<b>\$1,300,000</b>	<b>39,867,292.00</b>	<b>9,966,823.00</b>	<b>7x</b>





Destination  
Southern NSW



Destination  
Sydney Surrounds South