

Nature-based Tourism Investment Activation Project Outcomes

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North Coast Nature-based Tourism Investment Activation Project

North Coast Symposium – The challenge

Nature-based tourism is a key driver of visitation to the North Coast region and a key pillar of the Destination Management Plan.

EarthCheck's focus in this project was to:

- Identify** key nature-based tourism opportunities that had the potential to drive additional visitation, spend and investment into the North Coast region
- Engage** with existing tourism operators to simulate investment, build capability and create international ready experiences
- Support** three projects to shovel readiness - either bringing entirely new projects to market, adding value and removing barriers to existing concepts *or* matching identified opportunities with potential investors

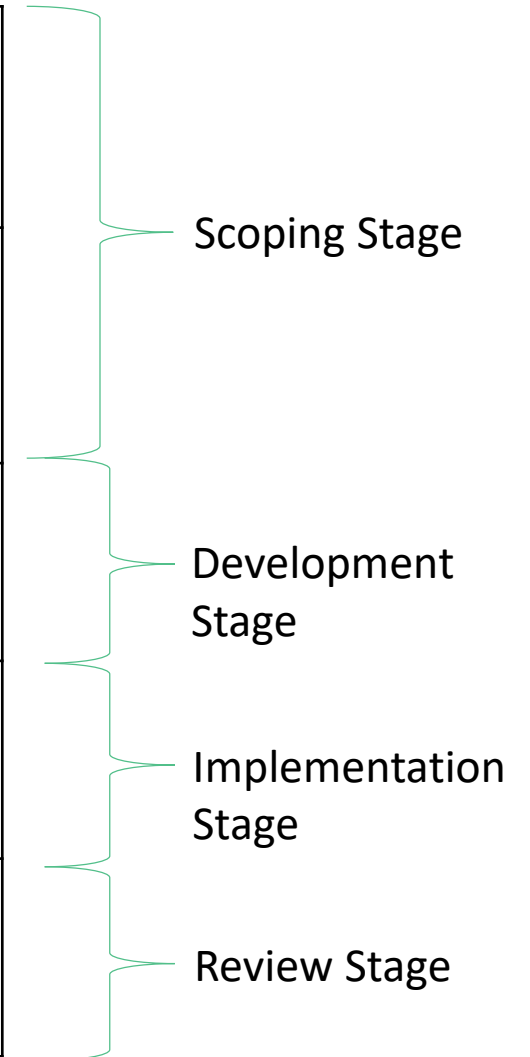


Destination North Coast DMP priorities



Project timeline

1	STAGE 1: Project Scoping JULY – SEPTEMBER 2018
2	STAGE 2: Partnership Development, Opportunity Identification & Scoping of Priority Projects JULY – DECEMBER 2018
3	STAGE 3: Development of Investment Project Plans JULY 2018 – JUNE 2019
4	Stage 4: Project Plan Implementation Support JULY 2018 – JUNE 2019
5	STAGE 5: On-going Ad Hoc Consultation JULY 2019 – ONWARDS



Tourism Investment Opportunity Long list Prioritisation



7 FACE TO FACE WORKSHOPS



250+ STAKEHOLDERS ENGAGED*



40 OPPORTUNITIES IDENTIFIED



RATING SYSTEM

Stakeholder Support

Financial Sustainability

Investment Attraction

Deliverability in Timeframe

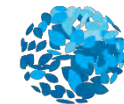
DNC and DMP Alignment



= Impact Score (%)



3 OPPORTUNITIES SHORTLISTED FOR ACTIVATION



EARTHCHECK



Destination North Coast NSW

*Not allowing for overlap

Three opportunities identified for Project Plan Implementation Support



Image courtesy of Clarence Valley News

Clarence Valley

Secure funding to support a River Tourism Investment Stimulus Plan



Image courtesy of Macleay Valley Coast

Macleay Valley Coast

Trek the Five Headlands
Accommodation, tourism and trails partnership

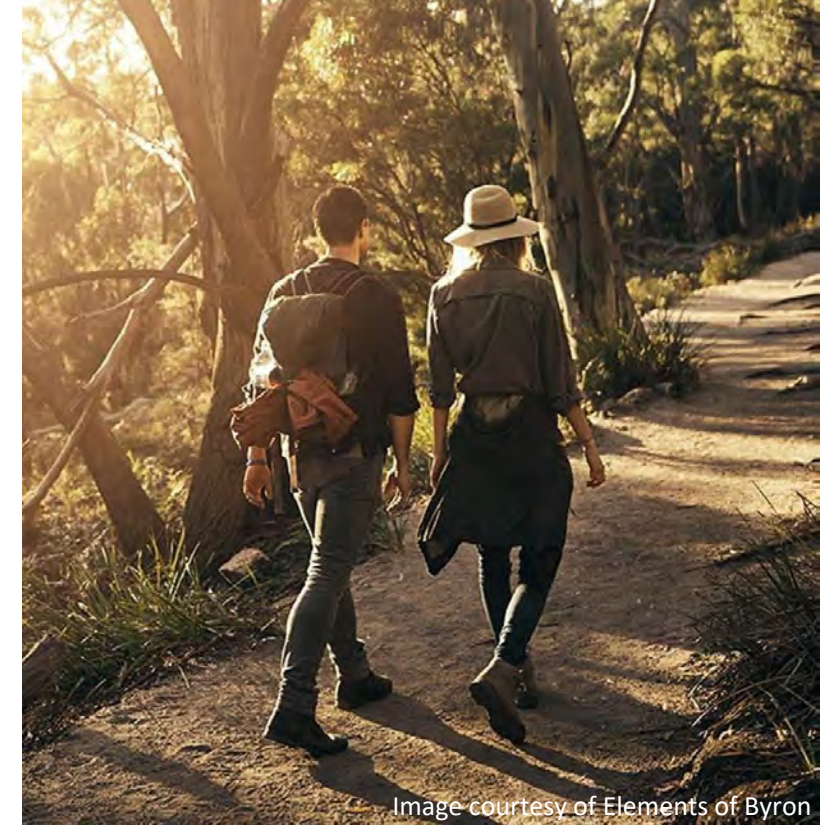
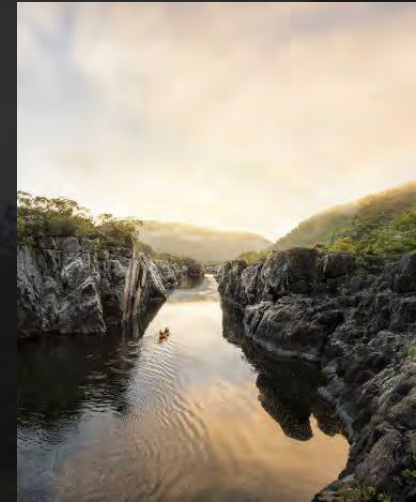


Image courtesy of Elements of Byron

Tweed Byron Hinterland

Explore Eco-Accommodation
Opportunities that leverage NPWS trail investment

Clarence Valley River Tourism Investment Stimulus Plan



The Opportunity

Activating the Clarence Kayak and Canoe Trail, Australia's longest white-water trail.

The Challenge

Tourism industry is still in a developmental stage with inconsistent river levels, especially in recent years, adding to the strain.

The Solution

Development of a business case for external funding in partnership with Clarence Valley Council for a 12-month Tourism Investment Stimulus program covering:

- Strategic investment planning;
- Tourism operator capacity building; and
- A major community river event.

The program

CAPACITY BUILDING

- River tourism operator capacity building & mentoring
- Help stimulate increased visitation
- Increasing the attractiveness of future nature-based tourism investment

STRATEGIC PLANNING AND TRADE

- Development of a Clarence Valley Adventure Tourism Investment Stimulus Plan
- Identify barriers and opportunities for investment
- Secure Clarence Valley as the host city for an internationally recognised Nature-based Adventure Tourism Export Conference

EVENTS

- Development of an inaugural Adventure River Tourism event
- Launch the Clarence Valley onto the world stage as Australia's premium river adventure tourism destination
- Creating community benefit through tourism and events

Stage 1

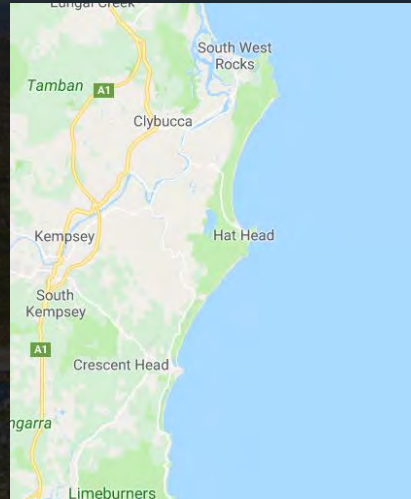
Stage 2

Stage 3



Opportunity Two: Macleay Valley Coast Trek the Five Headlands Trail

A five-day coastal trek from
Grassy Head to Point
Plomer.



The Opportunity

Connecting Council's five iconic coastal holiday parks using the existing walking trail network and the planned trail investment in Arakoon National Park, stimulating additional visitation and tourism development.

The Challenge

Kempsey Shire Council had developed a strong initial concept but needed assistance bringing the project to the next stage, including demand and partnership development pre-engagement.

The Solution

The DNC Project team have quantified potential demand, helped refine the Five Headlands Trail concept and assisted to develop partnerships with NPWS and other key land holder groups.



EXISTING TRAIL NETWORK

Proposed NPWS investment in Arakoon (project underway)

Proposed KSC Investment (under investigation)

Grassy Head Holiday Park to Stuarts Point Holiday Park

7km (inland walk) or 4km (via beach) or 3km (kayak)

Stuarts Point Holiday Park to Horseshoe Bay Holiday Park (or Trail Bay Campground)

10km (kayak) plus 5km (walk)

Horseshoe Bay Holiday Park to Trial Bay Gaol to Little Bay Picnic Area

4km (walk) plus 2km (walk)

Little Bay Picnic Area to Smoky Cape Lighthouse & Lighthouse Keepers Cottages (or Smokey Cape Campground)

10 km (walk)

Lighthouse Keepers Cottages to Hat Head Holiday Park (Or Hungry Gate Campground)

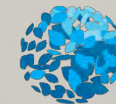
21km (walk)

Hat Head Holiday Park to Crescent Head Holiday Park

30km (walk)

Crescent Head to Point Plomer Beach House (Or Point Plomer Campground)

23km (walk)



Unique Selling Points



**INDIGENOUS
HERITAGE**



**CONTEMPORARY
HERITAGE**

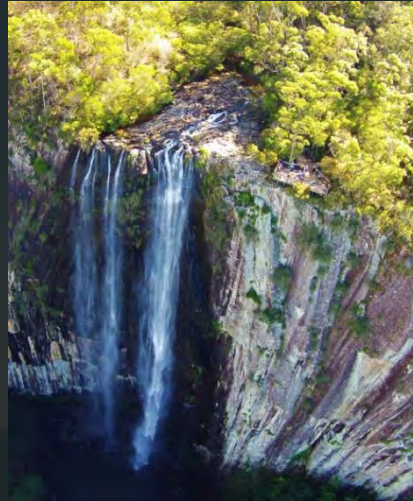


**LANDSCAPE AND
NATURAL BEAUTY**



Destination
North Coast NSW

Opportunity Three: Luxury Eco Lodge Development in the Night Cap National Park



The Opportunity

To investigate commercial opportunities that both cater to and leverage any additional visitation to the area expected from the NPWS Tweed Byron Hinterland Trail (working title) project.

The Challenge

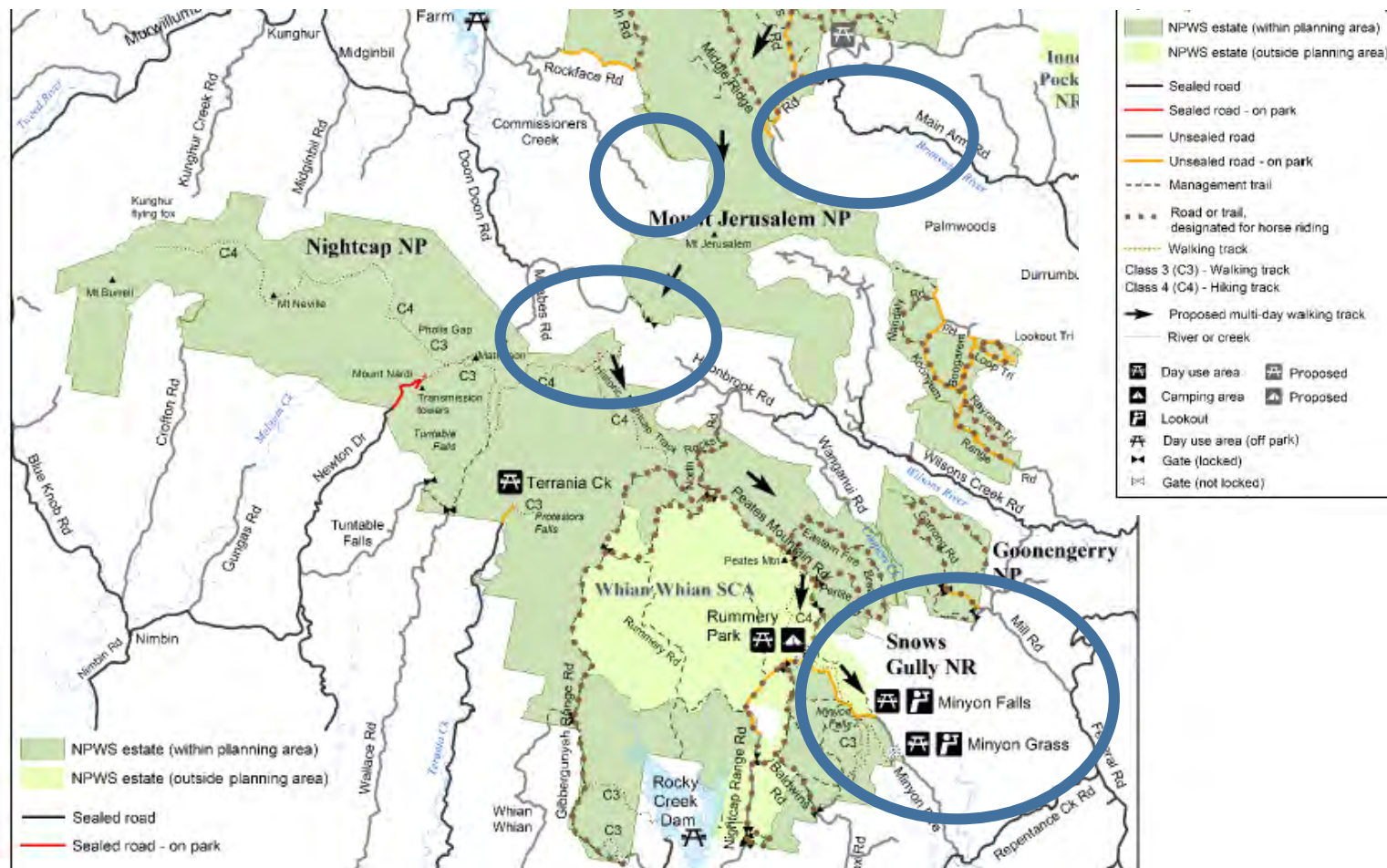
Being in the first year of a 4-year project, NPWS are still in the initial stages of determining the core market of the trail and the accommodation, tourism or commercial business opportunities that may exist.

The Solution

DNC have positioned themselves front and center at this initial stage, working in partnership with NPWS to help identify and promote key eco-accommodation development opportunities.

Plan of action

- Key to the successful activation of this opportunity is alignment with NPWS priorities
- This includes the outcome of the market sounding and demand modelling (conducted by NPWS) currently underway. (Due for completion mid August)
- Areas for eco-tourism investigation must be close enough to the trail to capture walking market, without being located physically within Parks estate.
- There is also opportunity to collaborate with existing eco-tourism operators



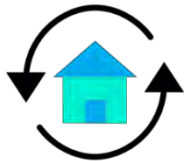
Proposed walking trail

(source: *Proposed Tweed Byron Hinterland Trails amendments to plans of management*, NPWS)



Key sites for ecotourism investigation

Learnings from the project



Challenges with investment attraction

- The journey from idea/concept to shovel in the ground can be significant
- Key issues with land tenures, permissions, stakeholders and landholders
- Rules for new investment fundamentals apply (locations near or within visitor hubs, major airports or existing infrastructure, opportunities that present low risk, or higher potential return to offset risks)
- Not always about new development – building on existing assets and opportunities often presents more favourable investment appeal
- Increasing investment appeal outside these hubs often requires public assistance (incentives, private-public partnerships, relationship brokering or Commonwealth grant assistance)

Learnings from the project

Opportunities for the future



- The role of a cross region “connector” to help broker relationships and drive collaboration. This may also remove logjams that occur between concept and actualisation and is vital to driving innovation and growth in the industry



- The aim of this project was to single out 3 specific opportunities for focus but has revealed a bank of ideas ready to grow to the next level



- This continued focus on connecting opportunities with enablers (e.g. public funding or private investment) is a priority of DNC.

Case Study: Thousand Lakes Lodge, Liawenee, Tasmania

The Challenge

- Redevelopment of a Lodge/ Antarctic training facility on World Heritage-listed land (Bernacchi Lodge)
- Taxpayers have helped former NASCAR and racing car driver Marcos Ambrose to open the Antarctic training facility (seven rooms, bathrooms and shared dining and lounge facilities)
- Until Mr Ambrose announced in 2015 that he and four other investors would spend \$1.3 million to renovate the building, it had been unused since 1999.
- The Government had supported the redevelopment of the Thousand Lakes Lodge with a \$340,000 grant from the Jobs and Investment Fund, an initiative jointly funded by the Tasmanian and Australian governments.
- Low impact, sustainable focus with a contemporary and unique Tasmanian experience

Success

- Since its opening in October 2016 – October 2017: hosted 1,500 guests from around Australia and the globe
- Lonely Planet has included Tasmania's nine-room Thousand Lakes Lodge among the three best places in the world to stay.

