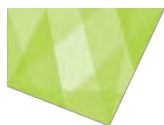


7 April 2025

Great North Coast Trail Feasibility and Business Case



Destination
North Coast NSW



This draft Great North Coast Feasibility and Business Case report was prepared by TRC Tourism for Destination North Coast NSW (DNC).

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ACKNOWLEDGEMENT

We acknowledge the Indigenous peoples of the lands, waters and communities we work together with. We pay our respects to their cultures; and to their Elders – past, present and emerging.

IMAGES

Destination NSW image gallery

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This report has been reissued in April 2025 following a review of the original version completed in September 2023, during which a discrepancy was identified in the calculation of costs and projected economic benefits. This updated edition ensures accuracy and reflects the correct figures. TRC Tourism regrets any inconvenience this may have caused.

VERSION CONTROL

Report name	Version	Date submitted	Author(s) / Editor(s)
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Executive Summary

The Great North Coast Trail (GNCT) project represents an opportunity for the New South Wales North Coast to capture a significant market, with the development of a world-class long-distance walking trail.

This feasibility study, commissioned by Destination North Coast NSW (DNC) and completed by TRC Tourism and MCA Economics, provides an assessment of the proposed trail, the target markets, and further proposes seven Signature Trails to showcase elements of the coast that appear highly suited to trail development and increased use.

In developing this study, we sought to maximise the use of existing walking trails, and (where necessary) roads and tracks, to avoid the need to develop new trails, given much of the proposed trail is located in National Park.

This study also acknowledges and respects the First Peoples of the region and acknowledges the principle of caring for country.

The concept

The proposed GNCT seeks to link existing walking trails throughout the region and showcase the nature-based experiences and outstanding coastal landscapes of the NSW north coast.

The trail and experience audit found that a route is feasible, however, to make it align with the target market's needs, it should include more manageable trail lengths in the 2–5-day range. These sections – called Signature Trails in this report – also provide commercial opportunities for businesses across a range of services, including accommodation, transport, provisions, and other experience provision.

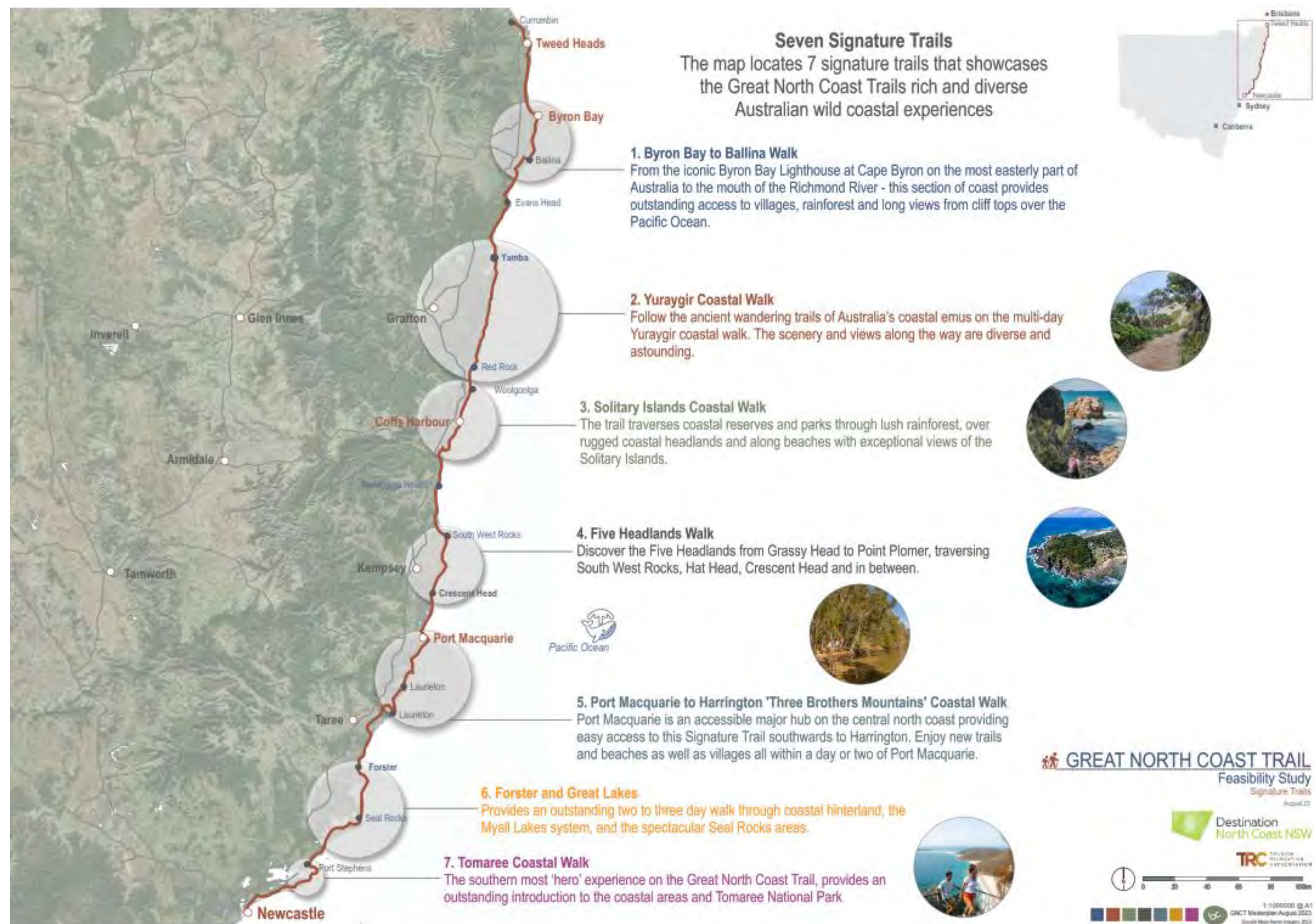
The trail has seven proposed Signature Trails that showcase the region and offer consumer-oriented trail lengths. This will help to attract higher-spending target markets looking for 2–5 day walking experiences that have some level of accommodation and support attached to them – providing greater economic benefit to the region.

The proposed Signature Trails are shown in Figure 1 on the following page and are (from north to south):

1. Byron Bay to Ballina
2. Yuraygir Coastal Walk
3. Solitary Islands Coastal Walk
4. Five Headlands Walk
5. Port Macquarie to Harrington 'Three Brothers Mountains' Coastal Walk
6. Forster to Great Lakes
7. Tomaree Coastal Walk.

Each of these proposed Signature Trails is described in this study and business case, including their proposed start and finish, route description and identified opportunities.

Walking the entire 700km trail would be a large and daunting task, but one that could be undertaken for a smaller part of the market. Advice received during the preparation of this study indicated that the walk would ideally be completed from north to south, due to prevailing winds and to keep the sun on the backs of walkers.

Figure 1. Proposed Great North Coast Trail and Associated Seven Signature Trails

ISSUES TO OVERCOME

While the proposed trail and associated Signature Trails present significant opportunities, there are several issues that further planning would seek to overcome. These include:

- **Long Sections of beach walking** – this can be difficult for the target markets with a rule of thumb indicating that around 3–5km is long enough
- **New trail completion** – a range of statutory planning requirements would need to be met to undertake new trail or facility construction, including climate resilience on the coastal areas, National Park planning arrangements, including plan of management changes, that can be time consuming to overcome
- **River and creek crossings** – the North Coast has several large rivers and creeks that would need to be crossed when walking the trail. Some of these have existing commercial ferry services, smaller crossings (such as Red Rock) will need bridges or commercial services.

GOVERNANCE

Governing a trail that is 700km long and that passes through 13 Local Government Areas (LGAs), of which 11 are in the area served by DNC National Parks, two product regions (DNC and DSSN) and a range of other government and non-government areas, and several First Peoples' areas, is not easy. The northern trailhead is also proposed to just sit within QLD.

An approach to bring the potential trail partners together to initially discuss the best way forward is proposed. This business case also flags the Incorporated Association model as the most likely to succeed – albeit in time, as the partners understand the need for governance and the benefits of a well-managed trail. Some funding to establish this model will also be required.

Coordinated marketing, development and advocacy would be required to bring this trail's opportunities to life.

¹New South Wales Government Guide to Cost -Benefit Analysis, NSW Treasury TPP17-03, March 2017

² This assumes the construction workforce would come from the regions where the trails are located.

³regional income is the total net income generated from the activity and covers wages and salaries of employees and profits of businesses within the region. It includes income generated directly within the

Economic impact assessment – business case

The Economic Impact Assessment report prepared by Michael Connell & Associates (MCA) provides an economic impact assessment of the GNCT (including the 7 Signature Trails) and a cost-benefit analysis. The report covers 10 years of operations for each of the signature trails. The results are indicative of the benefits to the region overall and the LGAs where the trails are located. The methodology used for the economic assessment and cost-benefit analysis is consistent with the New South Wales Government guidelines.¹

Construction Phase Impacts

Construction costs for the GNCT development are estimated at \$31.146 million. This includes the trails and the related infrastructure. The seven Signature Trails have a combined unfunded cost of \$16.344 million.

For the Signature Trails 33.5 FTE jobs (27.9 direct jobs and 5.6 indirect/induced jobs) would be generated during the construction period. The direct jobs are mainly onsite jobs on the trails and jobs in materials and equipment supply.

Based on the total budget for the entire GNCT of \$31.146 m, a total of 68.6 jobs would be generated (57.2 direct FTE jobs and 11.4 indirect/induced jobs).

During the construction period for the Signature Trails a total of \$7.845 m in regional income would be generated (\$6.538 m direct income and \$1.308 m indirect/induced).²

For the entire Great North Coast Trail, a total of \$16.062m in regional income would be generated (\$15.385m direct income and \$2.677 m induced/indirect).

Trails operations

The operations phase economic impacts of the trail are driven by the expenditure of trails users in the regions (LGAs) that the Signature Trails are located.

business and indirect income, which is generated in other regional businesses (wages and profits) from the multiplier impacts of employee spending on the region. In the modelling of income generated, income tax and GST on spending, are both treated as leakages from the region.

MCA's regional economic model is used to estimate the employment and income impacts of the proposed trail. The model allocates spending across relevant industry sectors and takes account of the significant shares of the gross spending by visitors/users which leaks out of the region.³

- Total users increase from around 209,260 in year 1 to around 240,370 in year 10. Local residents walking on segments of a trail account for around one third of users. Overnight visitors account for around 45% of trail users
- The trails expected to attract the highest numbers of users are Byron/Ballina Walk (Y1 46,130 and Y10 52,988) and Forster/Great Lakes Walk (Y1 39,444 and Y10 46,306)
- Total spending of all trail users increases from \$51.699m in year 1 to \$59.385m in year 10. Overnight visitors using the trails account around 88 % of the estimated total spending
- The spending estimates are based on spending occurring in areas adjacent to the trails in the LGAs that have the Signature Trails. This spending would cover food and supplies and some off trail accommodation for overnight visitors. It also includes spending on recreational and transport services (e.g. shuttle transfers). Locals who use segments of the trails, represent about one third of users but spend very little.
- A very small number of persons would walk the entire trail, which would take around 40 days to complete. We have projected walkers at between 250 to 350 per annum over 10 years (with average spending of \$100 per day). Total spending ranges from \$1.0 million per year to \$1.4 million.

³ The spending by trail users is not the economic impact and does not represent the increase in regional income. There is a major leakage of this spending out of the region due to : the GST (10%); and a significant component of the value of services and products purchased by visitors comes from outside the region (e.g. food ingredients, soft drinks, beer, consumer products bought etc.). The model takes account of these leakages and estimates employment impacts and the increase in regional income that accrue to the region where the trail is located.

Economic impacts - trail operations

Trail visitors/users and their spending support and generate jobs across several sectors in each LGA associated with a Signature Trail.

- Users of the trails were estimated to support and generate a total of around 238 FTE jobs in year 1 increasing to around 285 jobs in year 10
- These jobs comprise direct jobs in visitor linked services and indirect/induced jobs in the region
- The small number of persons walking the entire North Coast Trail generate 4.4 FTE jobs in Year 1 and 6.1 FTE jobs in Year 10.

The jobs generated are mainly in recreation services (e.g. support – shuttles, guides, etc. and other activities), accommodation, food service, transport, and retail.

Trail users and their spending provides a major boost to regional income (wages & salaries and business profits).

- All users of the Signature Trails generate total additional regional income of \$23.133 million in year 1 increasing to \$26.823 million in year 10. Regional income comprises direct income and indirect/induced income.⁴
- Total regional income generated over 10 years of Signature Trails operations is \$246.973 million (in constant 2023 prices).

⁴Regional income is the total net income generated from the activity and covers wages and salaries of employees and profits of businesses within the region. It includes income generated directly within the business and indirect income, which is generated in other regional businesses (wages and profits) from the multiplier impacts of employee spending on the region. In the modelling of income generated, income tax and GST on spending, are both treated as leakages from the region.

Benefit cost analysis

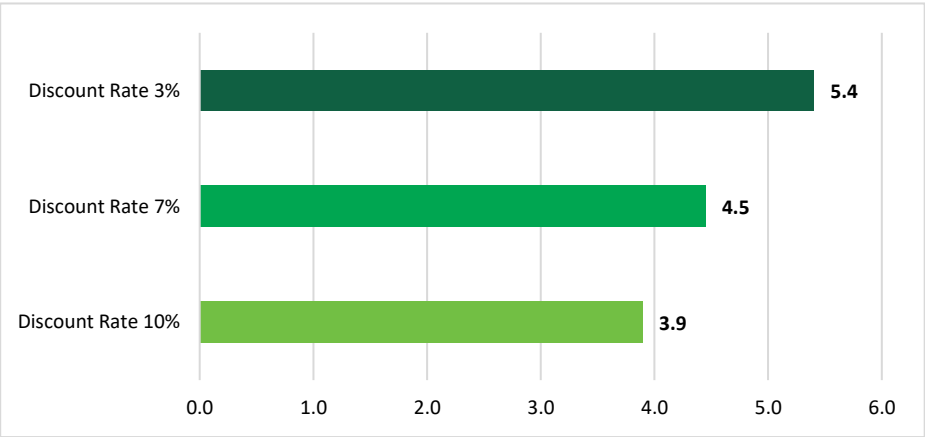
The benefits and costs are analysed for a 10 year period for the trails development and operations. The measured benefits are those associated with the user numbers over the 10-year period.

- The total estimated construction cost for the GNCT and the associated infrastructure is \$31.146 million.⁵ The 10-year maintenance costs are \$7.787 m (assumed to be 2.5% of capital cost per year over 10 years), for a total 10-year project cost of \$39.933 million.
- The measured benefits (10 years) for the trails were estimated: **Regional income:** increase in regional income generated by the spending in the region by users of the Signature Trails over the 10-year period is \$251.183 million.

The Figure 2 compares Benefit Cost Ratios (BCR) for the 3 discount rates. The discount rate is the interest rate used to calculate the present value of future cash flows to a project. The BCR for a 3% discount rate is 5.4, for a 7% discount rate 4.5 and for a 10% discount rate 3.9.

Using the 7% discount rate, the project returns a strong BCR. Every dollar of spending on the trail over 10 years delivers \$4.50 in benefit.

Figure 2. GNCT Development – Benefit Cost Ratio (BCR)



Source: MCa modelling & estimates, August 2023, revised April 2025

⁵ TRC cost estimates August 2023

1 Introduction

1.1 The brief

The proposed GNCT (working title) is a long-distance walking trail showcasing the very best of the coastal areas and towns of NSW between The Tweed on the Queensland border and Newcastle on the central NSW coast.

It is approximately 700km in length and can be walked from North to south (preferable) or south to north or undertaken in experience clusters that align to the target market needs of approximately 2-to-5-day products.

This feasibility study and business case has been completed to achieve the following objectives:

- Stage 1 – an overall project feasibility and situational analysis that has looked at the strategic alignment of the trail, the investment required to complete the trail, stakeholder consultation and trail governance.
- Stage 2 – a trail audit and development analysis that maps the trail, where there are issues and opportunities and any gaps and barriers that have to be overcome including river crossings.
- Stage 3 – a product and experience audit that delves into the related experiences on offer throughout the region.
- Stage 4 – a market analysis and marketability that determines the target markets and explores the economic benefits.
- Stage 5 – additional opportunity analysis that explores the number of jobs to be created
- Stage 6 – a report that makes a series of recommendations and project outcomes including to:
 - Determine the feasibility of developing the GNCT
 - Determine the overall likely economic benefits over a given period (10 years)
 - Determine the likely funding requirements for trail development if feasible.
 - Determine the likely investment attraction and regional stimulus.
 - Determine the best fit governance and management arrangements for the trail, and
 - Determine the existing and possible future premium walk sections and hero signature experiences.

This report meets the brief and, in some areas, goes further by providing a range of trail data and insights that can be used by managers to assist with the trail management and development objectives. Some of this detail now sits in a separate report as a product audit.

This report should also be read in conjunction with the Situational Analysis prepared for this project which contains a significant amount of data to aid in the market analysis, and trail product design, as well as looking at comparable trail case studies from around Australia and further afield.

1.2 Methodology

A simple methodology approach has been engaged to deliver this project. Aligning to design thinking principles, it has included engagement with the client group and PCG often to test and retest ideas and opportunities. The methodology included:

- Background research and project planning
- Stakeholder engagement and route alignment conversations
- Field assessments and trail and product audit (to a high level given the 700km of trail this feasibility assesses)
- Workshops and in region face to face consultation in four strategic locations along the coast: Forster, Port Macquarie, Coffs Harbour, and Byron Bay
- Testing thoughts and assumptions and preparing the documents for the client.

Financial analysis has been undertaken following the first stages of the methodology to ensure that the intelligence gained from stakeholders and the client has been heard and used in the modelling.

1.3 The location

The product region encompasses 14 local government areas (LGAs) being Tweed, Kyogle, Byron Bay, Lismore, Ballina, Richmond Valley, Clarence Valley, Coffs Harbour, Bellingen, Nambucca, Kempsey, Port Macquarie Hastings, Mid Coast, and Lord Howe.

A sustained period of drought, followed by bushfires and flooding has had significant environmental and economic implications for the North Coast Region.

However, the region has a rich variety of terrestrial and coastal landscapes including extensive beaches, cliffs and headlands, coastal lakes, channels, rivers, and streams supporting a variety of waterbirds, other animals and plant species, and vegetation communities including rainforest, forest, heath, grasslands, swamps, mangroves, and marine and freshwater environments.

The region contains many accessible and smaller villages and towns that provide the servicing required to support such a trail for the target markets. Added to the larger towns and cities including Port Macquarie, Forster, Coffs Harbour, and Ballina/Byron Bay.

The region is also well serviced by air with domestic airports that have regular passenger services including Taree, Port Macquarie, Coffs Harbour, and Ballina.

Nature-based activities are a significant component of the region's tourism experiences, with tourism hubs closely aligned with beaches, rivers, lakes, or rainforests. The region's natural assets offer a wide range of opportunities for activities such as walking, kayaking, mountain biking, camping, fishing, marine boating, and diving. The area is also a significant destination for beach activities and surfing. There is an existing range of trails and camping areas through the region's national parks.

The Pacific Highway (Highway 1) traverses the region from south to north and is now predominantly twinned with 2 lanes in each direction for the length of the region. Many of the coastal villages and towns are now bypassed providing opportunities for re-thinking their tourism offer.

1.3.1 Current management arrangements

As previously referred to, the trail passes through 14 LGAs. In addition, there are large areas of National Park management by the NSW National Parks and Wildlife Service.

From Newcastle to Tweeds Head, the North Coast is home to Bundjalung, Githabul, Yaegl, Gumbayngirr, Dunghutti, and Birpai Aboriginal nations and offers a multitude of Aboriginal experiences.

Destination North Coast acknowledges the First Nations people of which the Great North Coast Trail including Bundalon Nation in the North through to Worimi Nation in the south. All have unique cultural experiences for visitors.

Private property is generally avoided in trail assessments with Crown and Council management lands preferred due to the relative ease of constructing and maintaining public facilities on public land.

1.3.2 Extending the trail

The trail assessed in this report has been extended beyond the boundaries of the DNC organisation south into the Destination Sydney and surrounds North area. The main reason for this is to capture the outstanding opportunity of creating a product from the Tweed to Newcastle, and in the longer term linking it as a product with the Great Northern Trail from Sydney to Newcastle thereby creating a trail that stretches from Sydney to the Tweed and the border of QLD.

Figure 3. Map of the Destination North Coast region



Strategic alignment

North Coast NSW is identified as a ‘hero’ destination for NSW. The visitor economy is recognised as an engine of growth for the NSW North Coast.

The journey to investigate the GNCT included the review and analysis of more than 15 National, State and Local Government plans revealing that the project is strongly aligned with several strategic strategies and plans.

Appendix A provides a snapshot of the guiding plans and strategies for this feasibility and business case.

Most importantly, this feasibility and business case aligns with the Destination North Coast Destination Management Plan (DMP) as an authorising document. Action 2.1 of the DMP provides for the LGAs and LTOs to create distinctive experience trails and itineraries related to positioning the region’s strengths and linked to key source markets.

Several other actions provide context for this review under the pillars of Showcasing our Strengths, Building the Brand, and Facilitating Growth.

2 Visitor Economy Context

2.1 Overview

The North Coast NSW is recognised as the top-performing tourism region in NSW and has become a mature visitor destination receiving the third highest overnight visitation across the nation behind only Sydney and Melbourne.

2.2 Tourism performance

Between 2012 and 2020 (March YE), the region experienced the second largest increase in visitation (+4.5m visitors) after Greater Sydney (+14.6m visitors) with strong visitor growth and demand for greater facilities to support both ongoing visitor demand and population growth.⁶

Tourism is an extremely important sector for the North Coast that delivers \$10,423 of visitor spend every minute of every day. This is \$15 million per day and \$5.5B annually (+34% compared to 2021) and accounts for almost 10% of jobs (approx. 25,000) in the region a week and almost 7% of Gross Value Add (GVA).

The current visitor economy statistics include:

- Tourism delivers 10.8% (+1.4%) of our jobs employing over 35.6K North Coast residents (28K employed directly and 7.6k indirectly)
- The North Coast visitor economy is supported by 8,457 tourism businesses (+6%)
- Tourism delivered \$1.5 billion or 5.9% of the region's GVA in 2022 over 81% of which is delivered by our Accommodation, Food Service, Retail, Transport and Education establishments.

- A combined 11.6M visitors (+19%) stayed for 21.2 million nights (+14%), with an average nightly rate of \$236 in commercial accommodation (+8%)
- Airports in the region supported 10,472 flights (+36%) with a total capacity of 858,576 seats (+29.2%)

2.3 Trends likely to affect tourism and recreation (walking)

Global population demographics are shifting rapidly, and visitor economies must adapt to address the changing needs of different traveller cohorts. Younger travellers are demanding authentic and sustainable experiences and want their interactions digitally enabled (must be integrated into individual travel experiences) throughout the journey.

Meanwhile, a growing cohort of older travellers, multi-generational families, and people with disabilities means there must be a focus on accessible infrastructure, quality experiences, and a safe environment. Australia's quality infrastructure and reputation for safe and secure travel positions us well to adapt to and attract these growing markets.⁷ Great Ocean Road region can match this level of quality.

⁶ Source: March YE data sourced from TRA (IVS and NVS)

⁷ Draft Thrive 2030 Report: The re-imagined Visitor Economy – National Strategy, Aust Trade & Investment Commission Dec 2021

2.3.1 Nature and health

Increasingly travellers are craving space, nature, and a slower pace. Getting off the beaten track will appeal to the majority, not the minority. Tourism Australia's most recent consumer research, the Consumer Demand Project⁸, demonstrated that destinations with wide-open spaces feel safer for travellers—and, after spending more time at home last year, people are developing a new appreciation for being out in nature. More travellers will look to experience destinations in greater depth by cycling, walking, and kayaking.⁹

Soft adventure experiences like multi-day walks and wellness travel (i.e., spa holidays, and yoga retreats) have been growing in popularity over the past few years, and the pandemic has only amplified the desire for this style of holiday. Destinations and experiences that leave travellers feeling calm and rejuvenated—whether it is an all-inclusive multi-day hike, or an off-grid eco-cabin stay—are expected to be popular with travellers.¹⁰

According to a TripAdvisor report¹¹, in addition to spending time in nature and relaxing and dining out, one of the main areas where Australian travellers have an interest in 2022 is in self-guided cultural activities.

Secluded accommodations, camping in remote areas and extraordinary dining experiences in nature are examples that bring travellers closer to nature. Regarding accommodations, especially travellers in older age categories may opt more for exclusive cottages and villas that provide them with safety.¹²

2.3.2 New sense of enjoyment

In 2022, travellers are not just craving new tastes and places, they want to feel something. For Australians, a sense of gratification, like they have made the most of the trip, and excitement and exhilaration (37%) is what they are craving most.

Australians (36%) are looking forward to revisiting a favourite destination they have not been able to visit due to the pandemic, while 31% will be ticking off a bucket list

destination. Over indexing compared to global travellers, Australians (32%) plan to travel for longer and holiday more frequently (28%). Interestingly, Australians also lead when it comes to wanting to relax and do nothing on their next holiday (41%). Nearly half (43%) are searching for a sense of contentment and mental wellbeing, and a quarter (24%) plan to spend less time on their devices to be more present. This coupled with the fact Australian (45%) and New Zealand (49%) travellers lead globally when it comes to wanting to feel connected with those they care about, shows a strong desire to switch off and refresh themselves after another challenging year.

2.3.3 Adventure and experiences

The adventure travel market is forecast to become a \$1.3T USD global tourism segment by 2023, according to the US-based Adventure Travel Trade Association. Nature-based tourism sectors gathering traction with audiences include:

- Glamping and luxury tented accommodation in unique and spectacular locations
- Repurposing of heritage, industrial buildings and farm sheds
- Short walks and interpretive experiences, cycling, mountain biking in nature, and wellness experiences that speak to the improvement of mind, body and spirit.¹³

2.3.4 Immerse to discover

Travellers will slow down and revert to how they used to holiday - with fewer, but longer breaks. The short-haul will mean just that – a long weekend seeing family, or to the nearest beach. Bigger trips will be more mindful, rather than a recurring fixture – they will have a purpose, mark a milestone or fulfil a lifelong dream.¹⁴ This does not mean they will be doing less, according to TripAdvisor's latest 2022 travel trends report, 30% of Australian travellers say it is more important now that they “pack as many activities” into their holiday travel as possible.¹⁵

⁸ <https://www.tourism.australia.com/en/markets-and-stats/consumer-research.html>

⁹ <https://www.responsibletravel.com/copy/travel-trends>

¹⁰ <https://www.luxurytraveladvisor.com/australia-new-zealand/tourism-australia-predicts-top-global-travel-trends-for-2021>

¹¹ <https://www.tripadvisor.com/TravelTrendsReportJan2022?fbclid=IwAR04CiHwoSX60ZIDepym3tHJSBTrMtHlzHFQE-Bcv03LBMfRLiWuorsfGXs>

¹² <https://www.cbi.eu/market-information/tourism/walking-tourism/market-potential>

¹³ <https://getwherewolf.com/adventure-tourism-predictions-for-2021/>

¹⁴ <https://www.responsibletravel.com/copy/travel-trends>

¹⁵ <https://www.tripadvisor.com/TravelTrendsReportJan2022?fbclid=IwAR04CiHwoSX60ZIDepym3tHJSBTrMtHlzHFQE-Bcv03LBMfRLiWuorsfGXs>

2.3.5 The citizen traveller

Travellers will attach increasing value to genuine sustainability measures and the desire to reconnect with nature will see re-wilding and conservation breaks take root. According to booking.com¹⁶ 83% of travellers believe that the pandemic served as the tipping point for travellers to understand the importance of sustainable travelling, with 81% of travellers saying will stay in sustainable accommodation, 71% wish to lower their carbon footprint and 79% wish to switch to greener modes of transportation.

There will be a rise in people seeking deeper community connections through their holidays¹⁷ Post-crisis, travellers will be more mindful of residents; what they have been through, and the travellers' role as guests in the place they call home. Travellers will start asking themselves how their holidays can genuinely benefit those communities (regenerative travel), and how can learn about the local history and culture.¹⁸

2.3.6 First Peoples tourism

In 2019, 1.4 million international visitors (17% of all international visitors) participated in an Aboriginal tourism experience or activity in Australia. This is an average 6% year-on-year increase since 2010.¹⁹

For domestic travellers, the figure was one million, an increase of 13% each year since 2013.

Of the 317,653 tourism businesses in Australia, it is estimated that only 500 of these are Indigenous Tourism businesses.²⁰

Destination NSW collaborates with a portfolio of Aboriginal cultural tourism stakeholders to continue to grow the valuable Aboriginal cultural tourism sector.

¹⁶ <https://www.headout.com/blog/2022-travel-trends-and-predictions>

¹⁷ <https://www.responsibletravel.com/copy/travel-trends>

¹⁸

<https://www.tripadvisor.com/TravelTrendsReportJan2022?fbclid=IwAR04CiHwoSX60ZIDepym3tHJSBTrMthIzHFQE-Bcv03LBMfRLiWuorsfGXs>

2.3.7 Caravan and camping

For year-end 2022, caravanning and camping across Australia accounted for 12.6 million trips, 50.6 million visitor nights (+23% from 2021) and contributed \$7.4 billion in visitor expenditure (+29% from 2021).

Caravanning and camping account for 44% of all holidays, making caravan and camping the most popular holiday accommodation type for Australians.

Bushwalking is the second most popular activity undertaken by caravanners and campers undertaken on close to 4.5 million annual trips (eating/dining out rates in first place).

Interestingly, the largest demographic for caravanning and camping trips is the 30-50 age market, travelling both as couples without children (28%) and families with children (30%).²¹

2.4 Trail trends

The following trail global trends demonstrate an increasing enthusiasm for outdoor activities and a heightened recognition of the significance of establishing sustainable and user-friendly trail networks. With the ongoing rise in demand for outdoor recreation, it is probable that these trends will continue to influence trail development and marketing in Australia.

2.4.1 Adventure experiences for women

In recent years, there has been a notable rise in the involvement of women in outdoor recreational pursuits, specifically in bushwalking. In Australia, the number of female participants in bushwalking now exceeds that of males. (Ausplay The Australian sport and physical activity participation survey 2021.) AusPlay research suggests that women are increasingly attracted to trail experiences that offer chances to connect with nature and leverage the advantages for both physical and mental well-being.

¹⁹ Tourism Australia – Aboriginal and Torres Strait Island Tourism - [Aboriginal and Torres Strait Islander Tourism - Corporate - Tourism Australia](#)

²⁰ National Indigenous Australians Agency - Indigenous Tourism Fund Discussion Paper, 2019

²¹ Caravan and Camping State of the Industry 2022, Caravan Industry Association of Australia

2.4.2 Promoting inclusivity and ensuring accessibility

There is a growing recognition of the importance of creating inclusive trails and trail experiences that cater to individuals of varying abilities. This awareness has led to the incorporation of trails designed for diverse abilities in new trail development projects. The accessibility of outdoor spaces and trails is being enhanced through the implementation of various additional infrastructure and equipment. These include high contrast signage, accessible canoe launches, all-terrain and beach wheelchairs, as well as adaptive mountain bikes.

2.4.3 How the trail experience is evolving

Trails have the potential to be integrated into active transport routes to work, school, retail precincts, community, and recreation facilities. Facilitating integration with other transportation services, like trains and buses, will play a crucial role in incentivising individuals and visitors to utilise trails for their daily commuting needs.

There is an increased use of e-bikes, e-scooters and other e-transportation on trails and paths. Moving forward, a significant challenge lies in adapting trail planning, design, construction, and maintenance to accommodate these emerging trail usage patterns, all while addressing potential safety concerns and mitigating conflicts with other trail users. Financial year 2021 saw record sales of e-bikes in Australia and e-cargo bikes are increasing in popularity for short trips and commuting.

There is a developing trend for long distance trails such as rail trails, offering trail users options to tailor experiences to their preference including mode of transport and length of experience. Bike packing, cycle touring and multi-day walking routes also provide opportunities for small business development to support these activities and users.

The popularity of trail running, and events is on the rise as individuals seek to venture off the conventional paths and challenge themselves in diverse and demanding terrains.

2.4.4 Revenue models are changing

In recent years, revenue models for supporting trail development, maintenance, and the provision of supporting infrastructure have become more diverse. These models now encompass user fees, shuttle services, involvement of commercial operators, trail sponsorship, and merchandise sales.

2.4.5 Online is essential

Online apps are available for navigation, performance monitoring, training, marketing, and promotion. Trail users are progressively favouring online apps over traditional paper maps and guidebooks as their primary source of information. These apps offer an opportunity to aid in promoting trails, raising awareness of environmental and cultural heritage values, gathering significant participation data, enabling users to report maintenance issues, and enhancing trail safety. Trail users and tourists are also using social media pages and blog posts to connect with community groups and share information on their trail experience.

2.4.6 Safety first

To ensure the preparedness and safety of all trail users, including the increasing number of less experienced individuals, it is crucial to provide education on safety practices and adequate preparation. Emergency services and navigation apps are increasingly being used to share trail issues and emergency information with trail users - facilitating effective communication between emergency services and trail users is crucial. Of equal significance is the provision of means for trail users to communicate their travel plans and request assistance in case of emergencies.

2.5 Visitor economy forecasts

Travel forecasts play an important role in shaping the potential GNCT product. The below valuable insights show that travel is strong and growing that will present great future opportunities in the identified target markets.

2.5.1 Australian domestic travel

Recent research by Tourism Research Australia has observed that the turnaround for domestic travel post COVID-19 restrictions are already above pre pandemic levels for 2022 with visitor nights anticipated to surpass pre-pandemic levels during 2023.

By 2027, there are forecast to be:

- 465.8 million domestic visitor nights (up 11% on 2019)
- 126.2 million domestic overnight trips (up 7% on 2019)
- 244.4 million domestic day trips (down 2% on 2019).

2.5.2 International arrivals

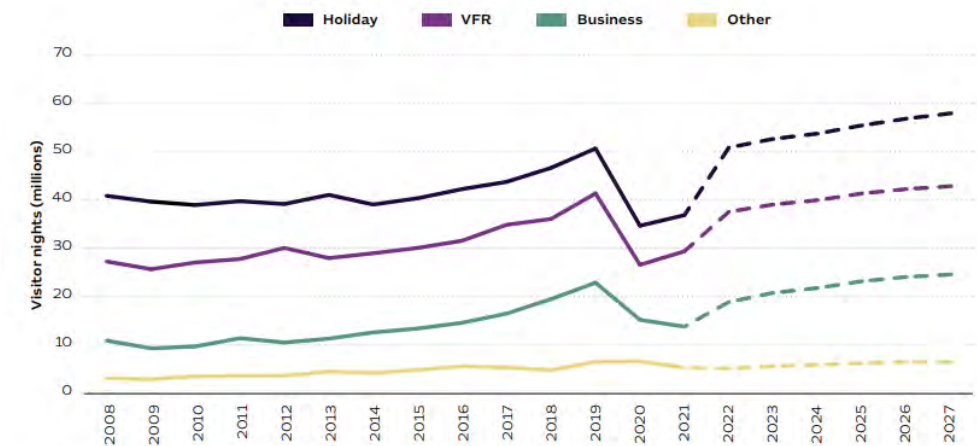
International tourism is expected to take longer to recover and be uneven across all markets and travel purposes. Preliminary forecasts suggest:

- By 2025 international visitor arrivals will be higher than pre-pandemic levels
- By 2027 a total of 11 million international arrivals are forecast (up 14% on 2019). This is an average growth of 26.2% per year
- International spend will return to pre-pandemic levels earlier, expected by 2024.

2.5.3 New South Wales visitation

Domestic visitor nights for NSW are set to surpass pre pandemic levels by 2027.

Figure 4. Forecast for domestic visitor nights in NSW by purpose of travel



Source: Tourism Research Australia

3 Market Analysis

3.1 The walking market in Australia

The walking market in Australia has experienced significant growth in recent years as the demand for sustainable and nature-focused travel experiences continues to rise. Australia's walking market is expected to thrive, offering unforgettable adventures and a deeper connection with the country's remarkable landscapes that aligns well with GNCT.

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

The value of bushwalking to regional NSW is significant with \$2.2 billion generated from domestic overnight visitors (excludes Sydney) with an average spend of \$152 per night. The average length of stay for visitor bushwalking in regional NSW is 3 nights.

The North Coast holds the majority market share for bushwalking in NSW (28%), followed by South Coast (20%), Hunter (10%) and Blue Mountains (9%).

Between 2016 and 2019 North Coast NSW had a relatively low growth rate of 2% in the number of visitor nights generated by visitors participating in bushwalking/hiking activities when compared with other regions in NSW. For example, the Central Coast has experienced the highest growth with a 129% increase over that period. Followed by the Hunter (81%), South Coast (39%), New England (28%) and Blue Mountains (27%). The growth rate for this segment for Australia was 27% over the same period.

This highlights the need for new trail development and better promotion of the assets of the north coast.

The analysis of 'walking tourism' in Australia is principally drawn from data in Tourism Research Australia's National and International Visitor Surveys, Ausplay National Sports, and Physical Activity survey along with TRC Tourism independent research.

3.1.1 National Parks and bushwalking

Bushwalking in national parks is a highly popular activity and has been generally trending upwards over the last decade. In 2019:

- A total of 20.6 million trips to national parks were recorded.
- Visitors stayed in the national park or surrounding region for a combined total of 80.8 million nights (average of 3.9 nights per trip)
- Visitors to national parks spent a total of \$18.5 billion on their experience, or an average of \$895 per trip / \$228 per night.
- 69% of visits to national parks (14.2 million visits) incorporated bushwalking as the main activity.²²

²² Tourism Research Australia, National Parks and Bushwalking for 2019

3.1.2 Ausplay national data

AusPlay is part of the Federal Government's Clearing House for Sport. The entity evaluates and provides national, state and territory data on different participation sports and activities.

The latest Ausplay data presented covers July 2021 to June 2022:

Participation rating - Bushwalking is currently rated in sixth position out of 133 different sports and physical activities undertaken by Australians.

Number of participants - 1.45 million Australian adults (7.1% of the population) and 22,600 children participated in bushwalking activities during the year.

Frequency - 18% of participants undertaking bushwalking activities at least once per week.

Annual income - 19% of bushwalkers have an annual income between \$100,000-\$200,000 and 10.5% of bushwalkers have an income of over \$200,000.

Age - Peak participation is shared across the age groups of 25-34 years (23%), 34-44 years (20%) and 45-54 years (19%)

Duration - 48% of Australian bushwalking participants walk for 3 hours or more on average.

Organised vs independent - 14.3% of adult bushwalks were part of an organised activity (e.g., tour or bushwalking club)

Top reasons to participate in bushwalking are to be outdoors and enjoy nature, for fun and enjoyment and for physical health and fitness.²³

3.2 Overnight walking market

Guided and self-guided accommodated walks are one of the fastest growing tourism products in Australia and other international destinations.

COVID-19 appears to have grown this demand with visitors seeking opportunities to immerse themselves in nature after two years of lockdowns. Increasingly, destinations are seeing the value of developing multi day walks to bring people to their region.

In 2022, TRC Tourism identified a major lack of data analysing the characteristics and motivations of overnight walkers and conducted independent research from a representative sample of over 5,000 Australians and identified the following characteristics and motivations:²⁴

- Approximately 22% (**3.3 million**) Australians have undertaken an overnight walk in the past five years or have an overnight walk planned in the next 12 months.
- High travel propensity - 94% of overnight walkers had been on a holiday in the past year or had one planned for the next year.

3.2.1 Demographics:

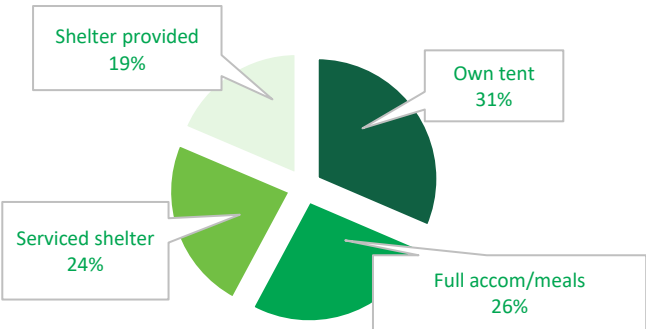
- **Australians** - 85% of walkers were born in Australia
- **Education** - 60% of overnight walkers have a university qualification
- **Age** - Compared with the average Australian, overnight walkers are younger, with 57% of walkers aged between 18-39 years of age
- **Parents** - 45% of walkers have children under 18
- **Travel party** - **40%** prefer to walk with **small groups of family and friends** of less than five people
- **Frequency** - Generally, walkers went on a walk every year or two.

²³ Ausplay National Sports and Physical Activity survey, Bushwalking Participation July 2021-June 2022

²⁴ Overnight walkers in Australia Dr Alli Anderson | TRC Tourism | 2022

3.2.2 Trail accommodation

Types of preferred overnight walking accommodation:



3.2.3 Spend

- **Own tent** – 42% spend up to \$100 /night
- **Shelter provided** – 38% spend \$100-\$300 /night
- **Serviced shelter** – 48% spend \$100-\$300 /night
- **Full service** – 52% spend \$100-\$300 / night, with around 20% happy to spend \$300-\$500 / night
- Ideal average spend is up to \$300 pp / night.

3.2.4 Distance and duration

- **3 nights or less** – preference by a third of walkers
- **4-6 hours walking per day** – preferred by nearly half of walkers
- **Less than 12km per day** – preferred by 60% of walkers
- **Self-catering** - Nearly half of walkers prefer to carry their own food and cook in provided facilities.

3.2.5 Trail services

- **Guiding** - Unsurprisingly, those using their own tent have a strong preference for no guiding, and those seeking full meals and accommodation enjoy either fully guided or guiding at accommodation.
- **Catering preferences** - People generally prefer to have facilities provided for catering, including those in their own tent, prefer a space (shelter, camp kitchen) to prepare meals.

3.2.6 Summary of walker profiles



Youth walkers (18-35 years)

Overnight independent walks with own tent (39%)
Seeking experiences in iconic landscapes (48%)



Middle aged couples (36-54 years)

Overnight independent walks with own tent (37%)
Seeking experiences in iconic landscapes (48%)



Older couples (55-65 years)

Prefer serviced shelters (34%)
Seeking iconic landscapes, dry weather and enjoying time walking



Families with older children

Prefer serviced shelters (35%)
Seeking iconic landscapes, dry weather and enjoying time walking



Retirees

Prefer fully serviced accommodation and meals (48%)
Seeking iconic landscapes, dry weather, time spent walking and services provided.

3.3 The international walking market

A range of sources have been reviewed to determine the size and demand of the global walking / hiking / trekking market.

- 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. The World Travel and Tourism Council identifies walking and outdoor adventure as one of the world’s high growth and value tourism sectors. Hiking, trekking, and walking was the top trending adventure activity reported by the Adventure Travel Industry in 2019 and 2020.
- In 2021, close to 59 million people in the US alone participated in a hiking activity at least once during the year, the highest number recorded with a growth of 80.4% since 2010.
- Strava, the leading social platform for athletes with more than 100 million members world-wide reported that hiking’s popularity had tripled on Strava uploads over the last 3 years, with 52% of all athlete members uploading their hiking trail activities to Strava in 2022. In addition, the share of athletes uploading activities outside their home country was up 101% on 2021 with numbers now only 3% shy of pre pandemic 2019 levels.
- Rezdy is the world’s largest online and booking distribution platform has compiled travel trends and statistics based on their bookings for 2023. In reference to hiking, they report that of all bookings, 61% of travellers are most interested in outdoor activities such as hiking, biking, and kayaking.
- The global adventure tourism market which incorporated hiking, cycling and water-based activities holds an estimated value of USD \$282.1 billion, and is projected to expand at 15.2% per year from 2022 to 2030 to over USD \$1 trillion. Hiking is the number one adventure tourism activity undertaken by adventure travellers. For Australia, the adventure tourism market contributed \$22.3 million in 2019 and is forecast to grow to \$33.5 million by 2027.
- Based on age group, the 51-60 segment dominated the global adventure tourism market and accounted for a revenue share of over 25% in 2021. The couples segment held the largest revenue share of more than 40% and is expected to maintain its dominance due to rising disposable incomes and increases in ‘couple oriented’ holiday packages.
- The Asia Pacific incorporating Australia has been identified as a fast growing adventure tourism market, with annual growth forecast at 16.4% per annum to 2030.
- In Australia pre-COVID, Tourism Research Australia reported that international visitors engaging in bushwalking and rainforest walks increased by 7% to 1.9 million per annum (2018).
- 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.

4 Developing a Great Trail

4.1 Characteristics of great trails

For the Great North Coast Trail (or the signature trails on it) to be a world class experience it must be more than the physical trail. A combination of factors attracts visitors including the environment and setting, the quality and quantity of trails, their accessibility and the interest and challenge offered. A critical component of a successful trail experience is the capacity to service the needs of the visitors 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 the GNCT signature experiences’ design and management.

While a destination may have a world class trail, it is the combination of trails and overall visitor experience that creates a trail destination that residents are proud of, and visitors seek out. The characteristics of what makes a great trail include:

- Clear point of difference for the trail experience that is well communicated through marketing
- High market profile within the destination
- Complementary nature/culture/historic based attractions, products, and infrastructure in the region
- Opportunities to stop and explore are key attractions offered by the trail
- Ability to cater to both independent and guided walkers / riders
- An experience that offers a level of exclusivity and avoids high volume nodes or trails
- A quality, seamless experience with ease of information, booking and accommodation
- Level of challenge and distance that is geared to consumer preferences.

4.2 Elements of a world class trails destination

For the entire NSW north coast to be recognised as a world class trails destination, and not only maintain its market leadership in NSW but grow it, a number of elements must be pursued, not just creating well designed trails capitalising on the stunning coastal landscapes, rainforests and beaches.

Figure 5 shows the elements that when combined and done well, provide outstanding visitor experiences.

Figure 5. Elements that combine to make a world class trails destination



4.2.1 Management governance and resourcing

Trails that realise their potential and operate sustainably over time tend to have governance entities:

- with a clear mandate for trail development and provision of leadership and vision
- clear statements of roles and responsibilities of the various parties involved in management tasks including financial and budget responsibilities
- that incorporate personnel with the skills and experience relevant to leadership, effective decision-making related to the trail and governance tasks
- that include arrangements/agreements at a senior level with any agencies tasked with trail management and maintenance.

There are several possible governance models for the proposed trail's development and management, and the recommended model is discussed later in this feasibility assessment.

4.2.2 Effective planning

Strategic planning by the trail governance entity and or land managers and trail managers for the development and operation of the trail over time is important to provide a consistent direction, identify objectives, provide strategies to address issues and achieve objectives, identify investment needs and define roles and responsibilities. Where trails are developed in stages dependent on the availability of funds, a strategic plan, Master Plan or business plan will provide clarity on future funding needs.

4.2.3 Information and bookings

Understanding a trail's current and potential local and visitor markets is an important part of trail business – it assists promoting a trail to, and developing the right products and services, for the people most likely to be attracted to the trail. Strong on-line and in-situ visitor information enhances the experience, provides a degree of comfort to walkers and can be used to tell stories. Simplified booking arrangements that can package support services such as accommodation, food and beverage and transport options are strongly encouraged.

4.2.4 Transport and access

Many of the trails and trailheads recommended in this plan require vehicles to help people arrive and depart, often from one-way trails although loops have been designed as options.

The opportunity exists for transport services to the villages and shuttling walkers between the various stages and elements of the walks, depending on their chosen itinerary.

4.2.5 Infrastructure and accommodation

Supporting infrastructure and accommodation will be critical to the success of a trails-based destination aiming at capturing visitors for periods longer than a day or so at each of the main locations along the coast, and also attracting them to shoulder and off-season stays. Major towns including Coffs Harbour, Port Macquarie, Forster and Byron have significant infrastructure and accommodation stock on hand to fill this element of the visitor experience – particularly in shoulder seasons which is when the walking is at its best.

4.2.6 Marketing and promotion

Marketing needs to be aimed at the target markets and create a sense of excitement setting the North Coast apart from other destinations. Destination North Coast and Destination NSW along with other trail promotion avenues have the skills and potentially the resources to do this. This is particularly important for the signature experiences along the trail.



5 Strengths Weaknesses Opportunities and Threats

The findings listed below include the opportunities and barriers and local issues affecting a potential Great North Coast Trail concept.

The region's strengths, weaknesses, opportunities, and threats were initially reviewed in the North Coast DMP and more closely identified for the trail concept during the development of this feasibility assessment.

(Please note – some points may appear in more than one section)

STRENGTHS

- Leverages the natural beauty of the region
- Aligns to the vision and plans for LGA's and DNC
- Offers unique and memorable experiences to visitors
- Disperses visitors along the coast and not just concentrates them in 'hot spots'
- Helps existing businesses leverage new products and markets to grow their economic base and expand in their service offering
- The diversity of the Coastline offers unique 'smaller experiences' of 2–4 days that can be developed
- Abundant nature-based attractions and experiences, world-class surf beaches, rivers and waterways, and National Parks and State Forests
- Well known and popular destinations among domestic and international markets
- World-class food and produce experiences to support the product
- A broad appeal of the village to village notion of the trails
- Many campsites currently exist – some need some work
- Offers the potential for First Peoples cultural experiences when self-determined
- Offers the potential to provide conservation education along the coast line
- Has the potential to provide for different markets with different products
- Provides some 'off-peak' business opportunities that may help businesses offer year round services, not just in the busy holiday periods
- Provides health benefits to all who may use the trail or parts of it
- The potential to build in regenerative principles into the trail's business model
- Helping trail users and visitors understand the Traditional Owners of the land upon which they travel
- Provides the opportunity for greater regional collaboration along the length of the proposed trail
- Provides for regional leadership.

WEAKNESSES

- Connectivity issues in some parts of the trail – longer term planning horizons may be needed
- Potential allowance for climate change and coastal erosion as well as fire hazards in summer
- Overall quantity and at times quality of accommodation
- Lack of understanding among businesses involved in the visitor economy potential of the proposed trail
- Major river crossings north of Coffs Harbor to the border
- Long beach sections – how to avoid them?
- A lack of signage along the coast currently affects navigation and branding
- Funding to implement the walks – some LGAs have differing investment opportunities
- There is a lot of regulation between the various authorities and LGAs to overcome
- Funding to build and maintain the trail needs careful consideration
- Some specific areas need consideration including the Evans Head Military areas
- How to govern the trail effectively needs consideration
- Transport services to and from some parts of the trail are difficult or non-existent
- Mobile phone coverage is non-existent in some areas making emergency management difficult

OPPORTUNITIES

- GNCT could be a connection of the existing network of high-quality walking and nature-based activities to eventually deliver 700km of recreational trail along the Northern NSW beaches and coastline
- GNCT could act as the umbrella brand for a series of interconnected shorter walks that would likely be consumed separately rather than as a whole trail.
- The project aims to link and promote collectively the walking trail infrastructure already in place and new infrastructure being invested in by State Government and local councils along the coastline.
- Attracts new markets to the region aligned to nature based and adventure tourism
- Collaboration with First Peoples on business opportunities
- Facilitating growth and investment in nature-based tourism product and experiences to showcase the world-class natural attractions, National and World Heritage Parks and coastlines and waterways
- Facilitating growth in luxury and wellness sectors to meet growing customer expectations
- Ensuring destinations (LGAs and LTOs) and visitor economy operators are prepared to deliver sustainable experiences as climate change and sustainability are moving up the agenda
- Improving infrastructure and facilities of camping and caravanning to service this growing market including establishing RV friendly towns
- Facilitating cooperation across destinations to build strong itineraries that engage visitors to come for a short stay or to stay longer and spend more
- Increasing yield of prevalent day trip market or turning day trippers into overnight visitation through product and experience development

OPPORTUNITIES – cont.

- Connecting the Solitary Islands walk to a broader trail
- Utilising some of the existing cycling trails where possible
- Look at loop options where possible
- Regional collaboration – important opportunity
- Branding of the trail – important opportunity – get it common all the way down the coast
- Conservation education for walkers along the coast
- Choosing multiple markets for multiple services and experiences
- Business opportunities for transport and boat services
- Connecting the smaller trails together
- Big opportunity for the smaller towns to get some ‘off-season’ product and utilise existing capacity that might exist
- Providing walking options – where there might be multiple trails going
- Give communities the option of developing solutions to issues themselves. I.e., develop the vision, provide the prospectus and let imagination within a set of standards
- Develop leaders and industry champions for the trail
- First Peoples business opportunities when they wish to take them
- Investigate longer stay markets that may want to stay in a place for more than one night
- Investigate the health options from people being in nature and walking

THREATS

- Difficulties in recruiting staff across the visitor economy
- Slow approval time for Development Applications
- Climate change and disaster events impacting businesses and natural assets
- Challenges related to land tenure (lots of difference tenures and managing authorities) making it difficult to govern and to deliver a consistent and high-quality experience
- Connectivity issues in some parts of the trail – longer term planning horizons may be needed
- Potential conflicts with other projects (Financial and Planning) and differing community perceptions
- LGA’s have other investment priorities – community needs vs new trail infrastructure

The proposed Great North Coast Trail project has significant potential for tourism development and economic growth.

However, it faces challenges related to beach walking, partnerships, governance, and infrastructure. Collaboration with Traditional Owners, leveraging existing attractions, and managing environmental risks are crucial for the project's success and sustainability and establishment of the iconic trail experience.



6 The Proposed Great North Coast Trail Markets and Characteristics

6.1 The concept

The Great North Coast Trail (GNCT) is a concept that delivers a long distance trail connecting Tweed on the Queensland border in the north to Newcastle in the south.

The trail would traverse approximately 700km of coastline and coastal hinterland and utilise where possible existing trails, beaches and other infrastructure.

Additionally, the market is seeking experiences between 2–5days and to generate income regionally from this trail, there needs to be signature trails along it that are designed to attract walkers to both serviced and serviced elements.

6.1.1 Signature trails

These signature trails are proposed to be:

1. Byron Bay to Ballina
2. Yuraygir Coastal Walk
3. Solitary Islands Coastal Walk
4. Five Headlands Trails
5. Three Brothers Mountain View Coastal Walk (Port Macquarie)
6. Forster / Great Lakes Walk, and
7. Tomaree Coastal Walk.

Each of these elements proposed to be developed as a signature experience (some targeting different markets) and branded under the GNCT brand. There is no need or proposal to change the existing name of the experience – for example Yuraygir would become Yuraygir Coastal Walk – a part of the GNCT.

Each of these proposed trails and the broader walk are described in more detail.

The proposal is shown in Figure 4 below.

6.1.2 Bookends








The trail can be walked in its entirety from north to south or south to north. Advice from bushwalking groups is that walking from north to south provides the maximum sun protection and also has the prevailing winds off the shoulder of a southbound walker.

Starting at the Snapper Rocks in the Tweed just over the QLD border, the start point provides context despite having a rather circuitous route through the urban fringes across the Tweed River.

The trail will ideally finish (or start - the trail can be walked either south to north or north to south) at Newcastle at Queens Jetty. The Jetty has been chosen as the logical start/finish point due to it being on the water, close to the Visitor Centre and the northern end of the existing Great Northern Trail – a long distance trail of some 260km between Newcastle and Sydney. Linking the GNCT to the GNT adds to the marketability of both trails – and provides a conceptual route from Sydney all the way north to the QLD border.

6.2 The principles

The following principles have been used to guide the trail alignment and will underpin the provision and promotion of the GNCT. The principles align directly with those developed for the Five Headlands Coastal Experience in the 2022 Feasibility and Business Case²⁵ to ensure alignment with like products that not only are designed to complement each other but nest underneath each other.

PRINCIPLES						
						
HIGH QUALITY TRAIL	VISIBLE BENEFIT	COLLABORATION	CONNECTED	GOOD GOVERNANCE AND STRONG PARTNERSHIPS	HIGH QUALITY AND DIVERSE EXPERIENCES	INCLUSIVE
Each trail section will need to comply with the Australian Standards 2156.1, and the Australian Walking Track Grading System and Sustainable Trail Planning Principles to reduce exposure to public liability risks and enhance public enjoyment and experiences on trails. Trail resilience is important in the face of climate change.	The GNCT will aim to deliver social, economic and health benefits to local communities including opportunities for First Nations Peoples to gain income and employment.	The success of the GNCT relies on the National, State and Local Government, community and, private sector working together. Cooperation will also contribute to building an enabling environment to support its positioning as a premium nature tourism experience on the Mid and North Coast of NSW.	The GNCT experiences will be integrated into the broader experience offerings of the region. This distinction means that walking will need to become a cross-cutting theme and influences the way that marketing and promotion of the region reinforces seeing and experiencing the GNCT should be promoted as a core proposition.	Partnerships will need to be established between government, the private sector, tourism industry and community groups to deliver a range of outstanding trail experiences and support services that meet market needs and expectations. The trail will need to be appropriately resourced, funded, managed and marketed.	The GNCT will offer exceptional experiences for domestic and international visitors that complement the natural and cultural assets of the region. The trail experience is planned by understanding target markets and trail users and adapts according to market needs.	The GNCT will have broad appeal and a diverse range of walking options for people of different capacities and interests for both residents and visitors.



²⁵ Five Headlands Coastal Experience Business Case. September 2022 for Kempsey Shire Council.




6.3 Target markets

Earlier sections in this report provided some context as to the target market’s aspirations and needs.

The markets for this product will differ according to the aspirations of the users. For example, a smaller number of hardy walkers will walk the whole trail every year. The needs of this group will differ from those travelling to undertake a 2– 5 day signature walk.

Table 1. Summary of target markets and their needs including how they will interact with the GNCT

INDEPENDENT OVERNIGHT WALKERS INCLUDING WALKING CLUBS		
	<p>Distance: Overnight stops spaced every 10–20km (depending on gradient).</p> <p>Demographic: Younger Adults, Women Travellers and Active 55+ groups. Experienced trail walkers who bring all their own gear. Usually walk with a small group 2-4 people, can also include bushwalking clubs.</p> <p>Expectations: Mix of grades (2-5) preferable, spend 1-3 nights. Happy with designated hiker bush camp, but will need stages along the trail where water, toilets and shelters are provided. Prefer to be separated from large groups (happy to share with other independent walkers), may be seeking shuttles to off trail accommodation. Will seek pre and post walk accommodation and experiences if travelling to a destination for the walking experience. Generally, has advanced navigation skills and is well equipped.</p>	<p>This group are likely to undertake more remote and challenging sections of the trail in addition to the signature trails.</p> <p>They will generally be more self-contained and seek bush camps with facilities that are comfortable.</p> <p>Walkers likely to walk the entire trail are most likely to be in this cohort.</p> <p>Most likely sourced from major cities including Sydney, Gold Coast, Brisbane, Melbourne and Canberra but can include regional centres as well.</p>
SUPPORTED OVERNIGHT WALKERS		
	<p>Distance: Overnight stops / trailhead access spaced every 10 to 16km (depending on gradient)</p> <p>Demographic: Younger Adults, Women Travellers, active families (older children) and Active 55+ groups. Seeking an experience where they don’t have to bring all their own gear at a mid-range level.</p> <p>Expectations: Mix of gradients (2-5 grading) with some sense of adventure challenges. Walking with a guide or local tour operator, or semi-supported provisions (e.g., shelters / huts, food drops, transport, equipment hire). Seeking unique, iconic and ‘brag-able’ experiences. Camping gear provided or basic huts separated from other users located within 1km of the trail (or a shuttle to take to accommodation further away). Trail options / accommodation for 1 to 3 nights as typically walking 1–3 nights on the trail plus one night before or after the trail journey.</p>	<p>This market will typically seek out the signature walks on the trail.</p> <p>They will be attracted to walks that offer adventure but that be achieved safely and with some support.</p> <p>Building the market presence of the GNCT will attract this market.</p> <p>This market will generally spend slightly more per person than the previous target group.</p> <p>Some work on the signature trails including packaging walks, accommodation, transport and potentially food and experiences will support this group.</p>

FULLY FACILITATED WALKERS		
	<p>Distance: Overnight stops/trailhead access points spaced every 10 to 16km with a mix of gradients offered</p> <p>Demographic: High Value Travellers and self-funded retirees - Highest average spend of all walk markets, an average of \$2,360 per trail and average length of 4 nights stay (\$590 per day)</p> <p>Expectations: Full commercial, seamless, all-inclusive high quality guided experience. Comfortable through to luxury roofed accommodation separated from other users located within 1km of the trail (or a shuttle to take to accommodation further away). Sense of remoteness, exclusivity. Trail options/accommodation for 1 to 3 nights as typically walking 1–3 nights on the best trail sections, plus one night before or after the trail journey.</p>	<p>This group are a high yielding target group for walking trail managers and tourism regions.</p> <p>Developing options for this market would help in achieving the desired increase in yield for the region.</p> <p>Out of park accommodation will in most cases be needed due to the constraints on building new accommodation within national parks.</p> <p>Any of the hero walks identified in this report could be made to fit this market with careful planning and investment as well as appropriate tour operators.</p>
DAY WALKERS		
	<p>Distance: Short walks up to half day to full day (2-15km)</p> <p>Demographic: Suits young families, mature travellers, persons travelling with a disability or reduced mobility, visitors with minimal hiking experience, residents wanting a walk close by for daily exercise or visitors short on time.</p> <p>Expectations: Mix of grades (1-5) depending on ability. High quality short nature walks with facilities (easy to access, well maintained, clear trail, markers, signs, good on trail interpretation, car parking, amenities etc.). Trails either start at, or are not too far away from, a major hub and include unique features or points of interest. Could be offered as a guided experience with localised story-telling opportunities.</p>	<p>This market is potentially very strong for the trail and associated towns.</p> <p>Providing a promotable series of day walks that capture the essence of the trail will provide this market with the reason to stay a day longer in region or may be the reason that tips their decision in favour of visiting the region in the first place, as opposed to other competitor destinations.</p>
TRAIL RUNNERS		
	<p>Distance: Can vary from a day trail run through to overnight challenges. Trail running events provide a range of options to suit abilities, from 5 to 10 kilometres for beginners through to 30 plus kilometres for expert level. There are also the 'Ultra' trail running events consisting of 42 kilometres or greater.</p> <p>Demographic: Broad demographic from families, young adults, 35-50 years and over</p> <p>Expectations: Seeks challenging trail experiences where increased risk and physical endurance is part of the attraction. Advanced levels of competency and self-sufficiency. Prefers remote locations with highly technical terrain. If participating in an event, will seek pre and post event accommodation and experiences. Likely to travel with supporting family and friends.</p>	<p>This is a very fast growing part of the outdoor active trail market.</p> <p>Events can be established that bring in hundreds of trail runners (some go to the thousands) providing a significant boost to regional economies.</p> <p>Several sections of the GNCT align themselves very strongly to this market.</p> <p>Long stretches of beach are not appropriate for this user group.</p>

6.4 Characteristics

6.4.1 World class

The design and implementation of the trail, and particularly the signature walks that will be used for certain target markets, needs to aspire to be world class. It is acknowledged that this is an aspiration and will take some time to achieve.

Investment that is currently occurring in Tomaree Coastal Walk for example will provide high quality walking surfaces, infrastructure and access, that will showcase the world class coastal views and natural settings, in addition to the living culture of the region.

6.4.2 Strong governance

Developing a governance model for the trail is essential. Case studies from around the world show that strong and united decision making provides a sound basis for success.

In this case, the trail passes through 14 LGAs, 2 Regional Tourism Organisations, through various administrative boundaries within the National Parks and Wildlife Service and through multiple Aboriginal Land Councils throughout the North Coast, Mid North Coast and Sydney /Newcastle regions. A very small northern trailhead component sits within QLD.

This plan makes recommendations the best form of governance later in this report.

6.4.3 Marketing

Effective marketing is critical to achieving success economically from the trail. Different user groups and cohorts will be attracted with different messaging, and facilities / products and packages.

DNC is well positioned to work with the LGAs, and NPWS of the trail and provide the branding and marketing for the trail.

6.4.4 Partnerships

Having all groups working together on the trail's development, planning and growth is critical. It is expected that some partners will be willing and able to proceed at a faster pace than others and the essence of a good partnership is understanding.

Models for the partnership development are discussed in the governance section of this report.

6.4.5 Community support

Working with the community on the trail is also seen as important. Each LGA and the NPWS is best placed to work with their own communities while being guided by the partnership approach, and the strategic directions agreed to in the governance model.

The principles form a good basis for communities, and especially the matters relating to environmental management, trail and experience resilience and maintenance.

6.4.6 Environmental and cultural value management

This is a foundation element that is critical to all elements of the trail management. Protecting the very environmental values and cultural elements that the trail seeks to showcase is essential to sustainable trail management.

Environmental and cultural overlays may include such elements as First Peoples culturally sensitive sites, rare and protected fauna and flora, and the need to protect coastal areas from erosion.

Each section of trail will have a need for assessment prior to being worked on – or built.

6.4.7 Resilience

In the face of climate change, the trail will need to be constructed in a way that aids resilience. This may include avoiding some areas more prone to flooding, erosion of fires. Design guidelines can help implement resilience into trail management.

7 Proposed Trail Details

7.1 The full alignment

7.1.1 Route

The proposed GNCT is seeking to become one of the world's great long distance walks. Anchored at trailheads at Snapper Rocks in QLD, and Newcastle on Queens Wharf, the trail will traverse some of Australia's most spectacular coastline.

As with many of the world's great long distance trails, some section of the trail will receive greater use and from different market segments than others, and the design of the proposed trail both allows for that and encourages it.

Within this section of the report, the concept of signature trails emerges. These are designed to be more easily consumed by visitors and could be curated to meet their needs.

Figure 6 below shows the proposed route for the trail. This is a brief summary of the 700kms of proposed trail.

While the walk can be undertaken from north to south or south to north, this description is from north to south. Many people undertaking the entire walk may choose to walk it from north to south as the sun is predominantly on the back of the walker, and bushwalking groups interviewed in the formation of this report advise that the prevailing winds during the off seasons tend to have more of a northerly influence, meaning the wind is also on the walkers back more often.

Descriptions of signature trails are expanded upon further in this section.

The walk leaves Snapper Rocks at the Tweed and follows the roads and existing bridges south to the beaches and coasts. Water taxis could ideally be used to cross the Tweed River to avoid this section.

Heading north, several new sections of trail could be delivered between Tweed Heads and Byron Bay.

Byron Bay is an iconic seaside town with a famous light station. While the walk passes through Byron Bay, the town suffers from peak season accommodation supply issues and accordingly, the GNCT is designed to take people away from these larger tourist towns and disperse them along the coast and to drive off season demand.

Further south, Evans Head presents a challenge in terms of the military land and the prohibition of walking on the beach and the parcel of land affected by the weapons range. Shuttle services around this area are recommended.

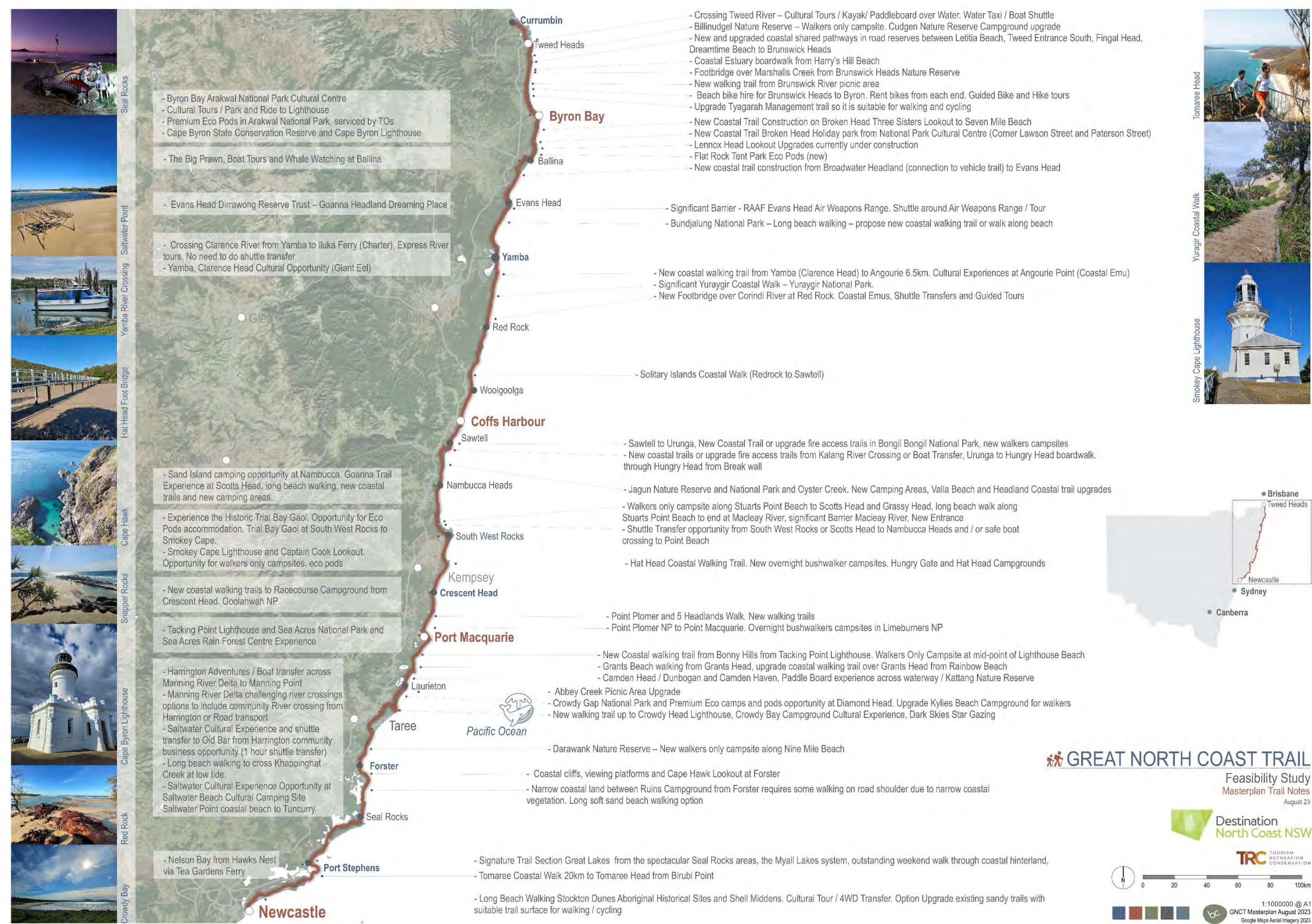
A major barrier to a continuous walking track on the coast is the Clarence River. One of the larger river systems on the coast, there are some ferry and commercial options to cross the river. These include the Yamba to Iluka ferry of the Express River tours. Should neither of these options be available, a road shuttle or taxi is the most plausible option.

The Yuraygir Coastal Walk concludes after a creek crossing that requires bridging or walking across when the tides and river conditions are right. With the Solitary Islands Coastal Walk starting at Red Rock, this is a major point in the trail that joins the two Signature experiences.

The Solitary Islands Coastal Walk is a signature element of this walk and in most places it already exists. Further activation through marketing, shuttles, accommodation and cultural experiences such as paddle boarding will add to its appeal in the market.

Walkers here have the opportunity to undertake a paddleboard experience and also to be shuttled to new glamping accommodation (to be completed 2024) just to the west of Coffs Harbour in the hills with spectacular views over the Pacific Ocean.

Figure 6. Great North Coast Feasibility Study Masterplan Trail Notes



The proposed Five Headlands Coastal experience, already itself the subject of a business case and feasibility study, provides enormous potential for walking, and kayaking, or should kayaking not be an option, transfers across the Macleay River delta.

North of Port Macquarie, the proposed trail requires some new sections with some campsites required for walkers only.

Leaving Port Macquarie, a major hub on the north coast, the walk heads southwards showcases wonderful headlands and beaches.

Further south, the challenging river crossings begin at the Manning River delta which also provides an opportunity for businesses to consider punts or ferry crossings.

Moving south, the trail joins the proposed Forster / Great Lakes signature element. This spectacular area around the Myall Lakes and Seal Rocks includes one of Australia's most beautiful Light stations at Sugarloaf Point.

A ferry ride south into Nelson Bay heading south, the proposed walk arrives at Tomaree Coastal Walk – the first of the signature trails. Tomaree Head's spectacular coastal headlands and forested hinterland provides an outstanding experience that is essentially just to the north of Newcastle.

The walk arrives in Newcastle, chosen for a variety of reasons including its proximity to transport back into Sydney, and an airport, and also the northern trailhead for the Great North Walk from Sydney.

7.1.2 Barriers and opportunities

Several barriers exist to the development of the walk. They are discussed in broad terms below.

RIVER CROSSINGS

A 700km walk on the NSW coast will cross a number of major river systems, and many smaller systems that still may present barriers to walkers.

Several already have water taxis or ferry services such as the service from Nelson Bay to Tea Gardens, while some opportunities are available commercially. Even if the need to pre-book the service exists, it will be a better solution for walkers.

In the absence of any commercial services, a number of community organisations may choose to take up the challenge. As a last resort (or in some cases it may be a preferred option), commercial taxi or shuttle services will generally be available.

Care will need to be taken by walkers when crossing smaller river systems and creeks as conditions are unpredictable.

BEACH WALKING

The entire trail contains long sections of beach walking, particularly in the sections that are currently not part of a signature experience.

Beach walking can be difficult and monotonous in the wrong conditions, but on the right conditions can be outstanding with shorebirds, whales etc all visible at certain times.

There is very little alternative to some sections of beach walking, while others contain opportunities for constructing new sections of trail.

NEW TRAIL

Constructing new trail on coastal areas requires considerable planning and can be expensive. Protecting Aboriginal cultural sites, managing coastal vegetation, national park plans of management, coastal resilience to climate change impacts including flooding and erosion are all reasons why existing trails should be used as much as possible, and the design of the GNCT as part of this feasibility study has attempted to do that.

Some sections of track that are important can be planned and built but it can be time consuming and expensive to get it right.

ACCOMMODATION

The north coast contains a vast array of accommodation stock, from camping grounds that are unattended, through to 5-star resorts and luxury holiday villas. Each serves a market.

Commercial opportunities will be presented to the market through the development and marketing of the GNCT concept, and in particular the signature trails. Within the signature trails, accommodation that is walker friendly, has pick up and drop options,

offers addons such as spas and lunch packs etc will prosper as the concept if the village to village walk takes off in Australia as it has done in Europe.

TRANSPORT

While transport options to the major towns and cities within the region are strong, intra region transport options can be problematic particularly where the trailheads or trail access points are outside the major towns.

While taxis, assuming they are available, can work for smaller groups, larger groups may struggle to get multiple taxis or may have to wait on a return trip where there may only be one taxi service available (some of the smaller communities). Shuttle bus services designed for walker pick up and drop off is a particular opportunity along the coast that has merit and could be encouraged, particularly in signature trails.

7.2 Signature trails

The market analysis clearly shows a preference for many market segments, of walks between 2–5 days, and that have some form of accommodation on the trail – and that can be in the form of glamping tents, serviced huts or higher end serviced accommodation.

The signature trails described below are the seven that potentially already exist, or that can be developed to showcase the region and meet the market needs.

This feasibility study recommends a master planning exercise for each of the signature trails to further understand the demand for each, the detailed works required to bring each up to standard, the most appropriate governance regime and commercial models that can apply.

Figure 7 below shows the location of each of the signature trails of the proposed GNCT.

Each is then shown in more detail and described including barriers and opportunities.



Figure 7. Seven Signature Trails of the GNCT

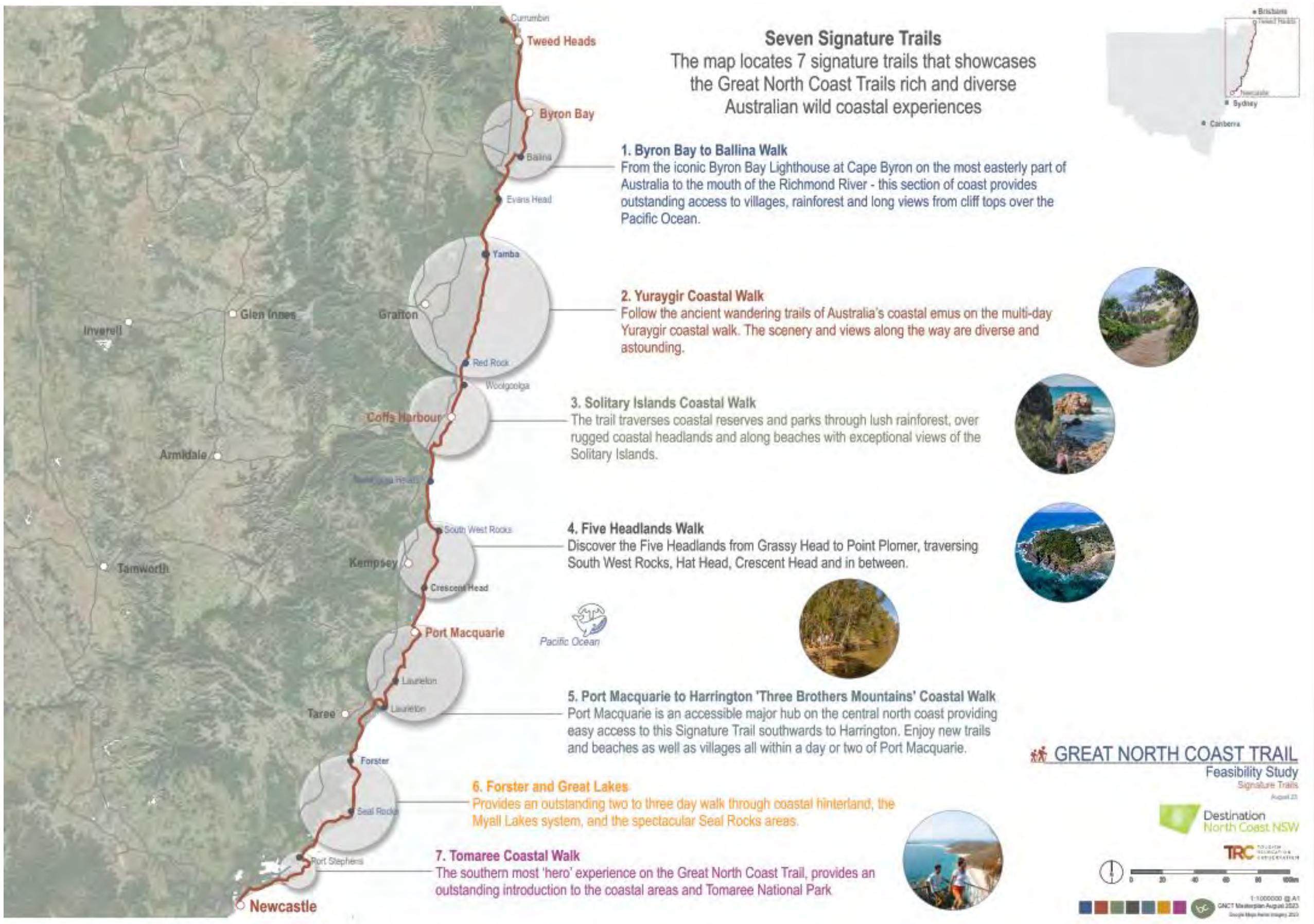
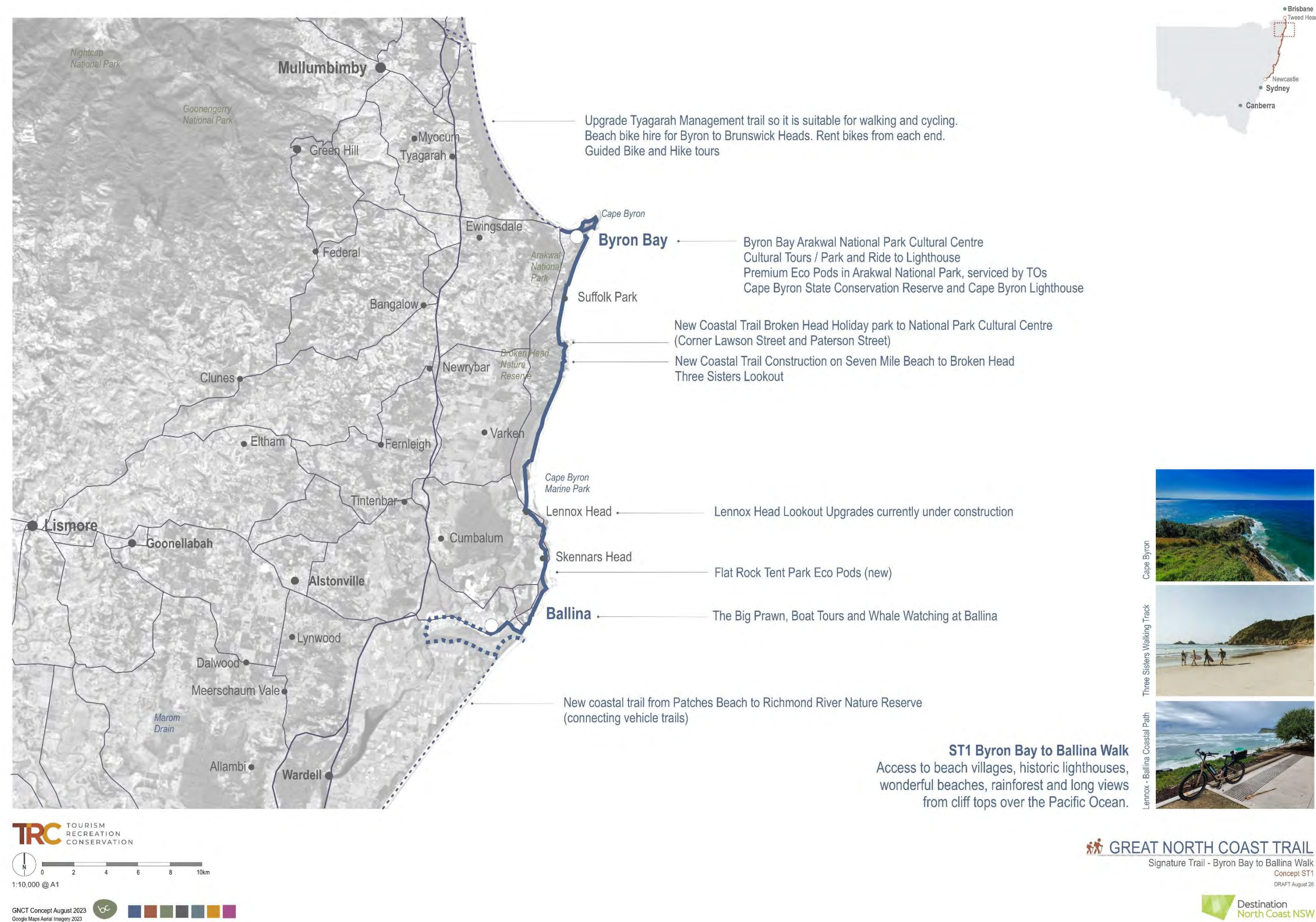


Figure 8. Signature Trail 1. Byron Bay to Ballina



7.3 Byron Bay to Ballina coastal walk

DESCRIPTION

The Byron Bay to Ballina Coastal Trail is a 35km walk between Byron Bay to Ballina. The trail heads south along some of Australia's most magnificent beaches and headlands. Parts of this walk take in spectacular stretches of beaches with easy walking at low tide on firm sand and over headlands with spectacular views along the eastern most point of the Australian continental landmass.

The trail is designed for multi day walking as a great introduction to the GNCT. You'll discover cultural experiences, lighthouses, whale watching, Broken Head, the coastal village of Lennox Head, relaxing and secluded swimming, surfing on world class breaks and fishing spots just steps from your tent along these coastal walking trails.

The trail itself is Grade 3 and will take the average walker 2-3 days to walk it, meandering along at a relaxing pace, while soaking up the bright sunshine of the easternmost coast of Australia

START AND FINISH

The trail begins by the beachside town of Bryon Bay on Cape Byron which is the eastern most point of the Australian mainland and it is the first place the sun touches in Australia every morning. The trail extends south to the fishing town of Ballina via the spectacular beauty of Broken Head Nature Reserve, experiencing Aboriginal culture taking in the Three Sisters Walking Track (Broken Head), rainforest walks, whale watching and fishing from pristine beaches.

Continue the journey along Seven Mile Beach to the seaside village and world renowned Lennox Point surf break of Lennox Head with breathtaking cliff faces, secluded beaches and coastal dune vegetation along the route. Arriving in Ballina, walkers are treated to abundance of camping, travel and accommodation options and the leading regional Ballina Byron Gateway Airport making travel to the start and finish locations of the trail a breeze.

The trail can be walked north to south or south to north. The majority of the information available on the walk is currently varied however assumes north to south use.

THE TRAIL ROUTE

Most of the public information describes the trail from north to south although it can be walked in either direction.

The general itinerary is for 3 days walking with shorter sections in this part of the GNCT allowing for meandering and relaxing walking without big days on the trail allowing the intrepid traveller to soak up this vibrant area with a myriad of experiences at foot.

Low tide walking is also recommended to allow for firm sand walking along Tallow Beach and Seven Mile Beach. The Headlands will be traversed with new sustainable trail construction to allow a through route for walkers and closing any gaps identified along the route.

The first day begins adjacent the Arakwal National Park at the corner of Lawson and Patterson Street (proposed future site of a Cultural Centre) and commences with a 5km return before dawn walk up into Cape Byron State Conservation Reserve, taking in the Cape Byron Lighthouse and the Eastern most point of the Australian mainland. Walkers then walk 7km along Tallows Beach from Cosy Corner to Broken Head. Dedicated walkers only campsites are required at Broken Head Holiday Park and will need to be pre-booked.

Day two commences with a short dawn walk along the Three Sisters walking track within the Broken Head Nature Reserve. 2.8km of new sustainable coastal walking trail will need to be constructed to create a through route for walkers to Seven Mile Beach. Walking 7.5km along Seven Mile Beach, walkers can take in the seaside village of Lennox Head, checking out the surf at Lennox Point and stopping for the night.

Day three takes in a dawn walk up and over Lennox Head, and stopping at the newly constructed lookout, before continuing along interesting coastline, with walking trails all the way to Ballina with lots of accommodation options, with opportunity for walkers only eco camping to be considered and developed.

HIGHLIGHTS

The trail takes in the eastern most coastline of the Australian mainland from Byron Bay to Ballina, with secluded walking beaches, spectacular headlands and views across the Pacific Ocean with a perfect balance of culture and nature.

The walk is on the traditional lands of the Arakwal and Nyangbal People of the Bundjalung nation and respect for country is foremost in walkers' minds and actions. Consider joining a Nyangbal half day coastal walk with a local, where you can enjoy foraging for native foods as their ancestors did and still do today!

LOGISTICS

Byron Bay and Ballina are both large coastal towns and contain all of the necessary infrastructure to support walkers.

Supplies are located in the villages and towns along the route including Byron Bay, Lennox Head and Ballina.

The Ballina Byron Bay Gateway Airport provides the closest access, located just 30 minutes south of Byron Bay providing services from five carriers, JetStar, Fly Pelican, Regional Express, Qantas and Virgin.

The Coolangatta / Gold Coast Airport is located in Coolangatta, just 40 minutes north of Byron Bay. This airport provides for flights from all major Australian capital cities, New Zealand and some Asian countries.

The Brisbane Airport is located two hours north of Byron Bay. While it is the farthest of the three nearby airports, it is also the largest. Because it operates with a wider range of carriers, including international carriers, and receives many more flights daily, it may be the best option for some travellers.

There are several companies that provide direct transfers from the airports.

ACCOMMODATION

The trail has many accommodation options along its length, however not ideally suited to walkers, and it can be difficult to book in peak seasons.

Each of the smaller towns on the trail have some options, and some holiday park campgrounds exist along the route.

Byron Bay and Ballina at either end of the route have many options however there are non-existent 'walker's only' campsites along the route due to high numbers of visitors to the region. Consideration must be given to dedicating 'walker's only' campsites and presents as an opportunity for the region.

COMMERCIAL OPPORTUNITIES

There are many commercial opportunities for business on the Byron Bay to Ballina Coastal Walk. These include:

- Walkers transport options to including potential airport pick up and drop off services
- Accommodation options designed for walkers – especially the markets not seeking to stay in campgrounds. This may include eco-camps, pods, cabins, glamping and other roofed accommodation, generally located outside the national parks to reduce visitor impacts
- Guided walking tours currently exist and can be expanded to include First Peoples experiences in what is a rich and cultural landscape. Cultural walking experiences currently exist in the region
- Food and water provisions along the trail.

COSTS

The walk is mostly in place with some new sustainable trail construction required along the route over headlands such as in the Broken Head Nature Reserve. Ongoing maintenance and marketing could aid in the benefits of the walk being realised to communities. Continued investment from Councils, NSW National Parks Service and other land managers will continue to help position the walk as a great easy 2–3 day option.

BARRIERS

Moderate sections of beach walking can make the trip difficult in some weather and tidal circumstances, however as the sections are relatively small, weather and tides can be negotiated by waiting for favourable conditions.

Pre-booking campsites is required in holiday parks as booking will be difficult in peak season.

Difficult soft sand terrain to be avoided on high tide sections of the walk.

In some sections, no formal walking trail currently exists, and new sustainable trail construction will be required to allow for a through walking route.

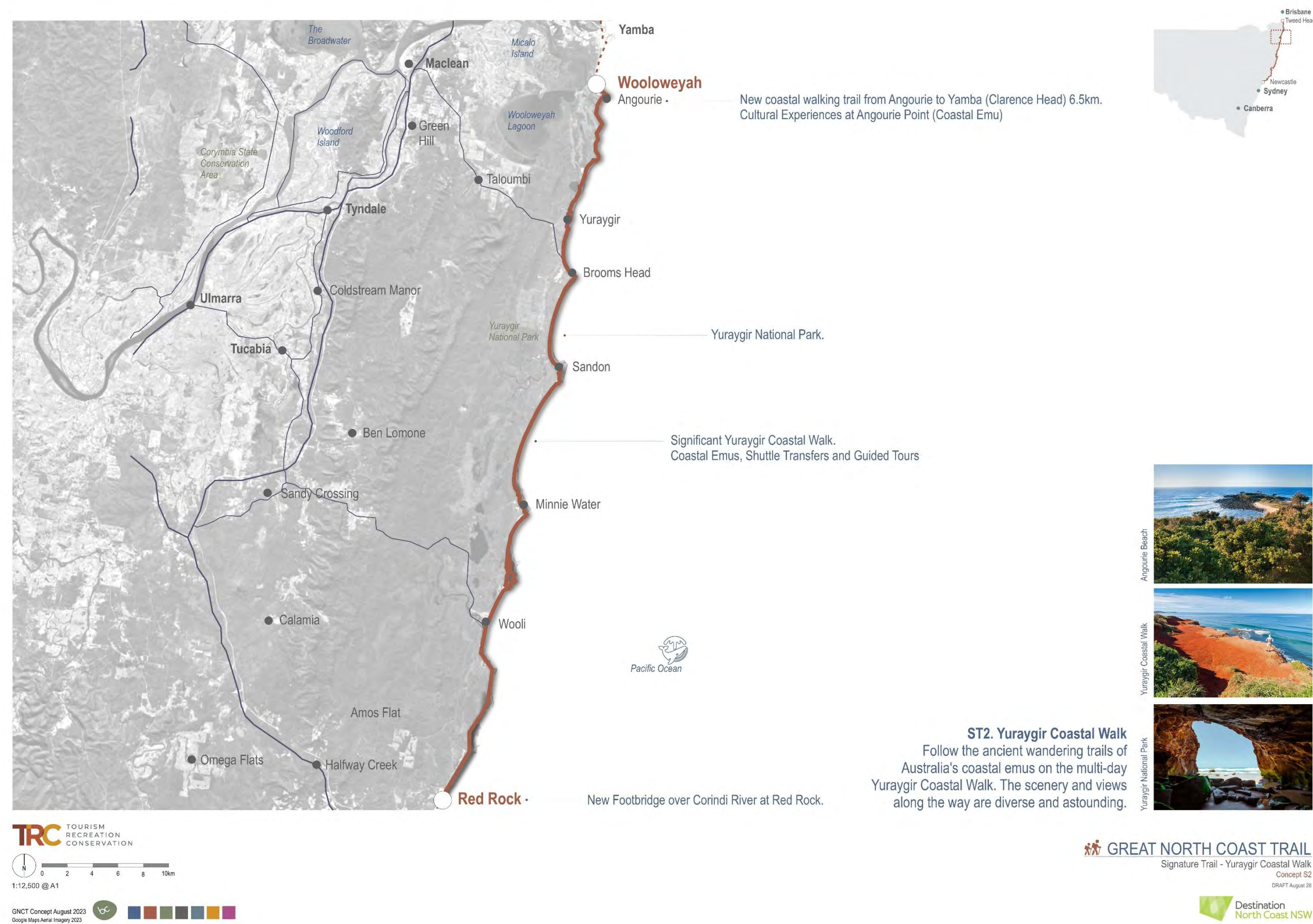
SUMMARY

This can be a relaxing and meandering section of the overall walk but also a beautiful one that allows walkers to 'unwind' and 'slow down'. Walking south is generally recommended to keep the sun and prevailing winds on the walkers back.

Camping and accommodation in the popular areas of Byron Bay, Broken Head, Lennox Head and Ballina can provide a uniquely relaxing walking experience as the area has natural beauty, rich history, world-class festivals, and it is brimming with things to see and do along the route.



Figure 9. Signature Trail 2. Yuraygir Coastal Walk



7.4 Yuraygir coastal walk

DESCRIPTION

The Yuraygir Coastal Walk is a 65km walk between Angourie and Red Rock just to the south of Yamba. The trail predominantly traverses national park beaches and coastal headlands with outstanding views and some remote sections of trail.

The trail is designed for multi day walking and contains whale watching, snorkelling and swimming experiences along its length.

The trail itself is grade 4 and will take the average walker 4–5 days to walk it completely.

START AND FINISH

The trail is bookended by villages in the north and south – with the town of Angourie forming the northern tip of the trail, and the coastal village of Red Rock the southern extremity. It should be noted that Red Rock also forms the northern end of the Solitary Islands Coastal Walk.

Getting to and from these villages can be problematic and, in most cases, private transport is required, or pre-arranged transport options booked.

Yamba is serviced through Ballina airport while Red Rock is some distance from Coffs Harbour airport.

The trail can be walked north to south or south to north. The majority of the information on the walk is produced assuming north to south use.

THE TRAIL ROUTE

Most of the public information describes the trail from north to south although it can be walked in either direction.

The general itinerary is for 4 days walking although shorter sections can be undertaken with pre-arranged transport options.

The trail heads south from Angourie with the majority of the 18km day on beaches with some of it over headlands. The first night (assuming people are on a 4-day trek) is spent at Brooms Head where commercial accommodation and services exist.

The second day is generally from Brooms Head to Minnie Waters with the majority of the day on beaches as well. This can be a tough day for walkers. The Sandon River requires a river crossing which can be arranged for a small fee. Minnie Waters is the destination.

Day 3 is generally from Minnie Waters to Wooli and is around 15kms. Only 5kms of beach walking on this day with the trail heading over headlands and through coastal woodlands.

The last day into Red Rock is also approximately 15kms and is quite remote. Much of the trail is scrambling and boat crossings of Wooli Wooli and Red Rock estuaries are required.

Low tide walking is also recommended to avoid traversing the headlands.

HIGHLIGHTS

The walk is marked with the ‘coastal emu footprint’ markers along the route.

The trail traverses the coastline from Angourie to Red Rock. The scenery and views along the way are diverse and breathtaking.

The walk is on the traditional lands of the Gumbaynggirr and Yaegl nations and respect for country is foremost in walkers minds and actions.

LOGISTICS

Yamba to the north of Angourie is a large coastal town and contains all of the necessary infrastructure to support walkers.

Transport to and from the start and finish of the trail is problematic unless you have access to private transfers or prearrange a commercial option.

Supplies are located in the villages along the route including Brooms Head, Minie Water, Wooli Beach and Red Rock.

ACCOMMODATION.

The trail has many accommodation options along its length but can be difficult to book in peak seasons.

Each of the smaller towns on the trail has some options, and some national park campgrounds exist along the route.

Yamba has many options being a resort town and the mouth of the Clarence River.

Red Rock also contains accommodation prior to leaving the trail and heading back to transport hubs such as Coffs Harbour.

Accommodation options are plentiful along the route in the smaller villages and the larger City of Coffs Harbour. During peak seasons can be expensive and difficult to find.

COMMERCIAL OPPORTUNITIES

There are many commercial opportunities for business on the Yuraygir Coastal Walk. These include:

- Transport options to and from Coffs Harbour and Yamba including potential airport pick up and drop off services,
- Accommodation options are designed for walkers – especially the markets not seeking to stay in campgrounds. This may include cabins, glamping and other roofed accommodation, generally located outside the national parks to reduce visitor impacts.
- Guided tours including First Peoples experiences in what is a rich and cultural landscape
- Food and water provisions along the trail.

COSTS

The walk is essentially in place. Ongoing maintenance and marketing could aid in the benefits of the walk being realised to communities. Continued investment from Council, NSW National Parks Service and other land managers will continue to help position the walk as a great 3–4 day option.

BARRIERS AND GAPS

Long sections of beach walking can make the trip difficult in some weather and tidal circumstances.

River crossings need to be made in advance to ensure reliable service.

Difficult terrain to be avoided on high tide sections of the walk.

In some sections, there is very little fresh water available. In addition, rough seas can make some sections of the beach walking impassable in all tidal conditions.

Summary

This can be a remote and challenging section of walk but also a beautiful one. Walking south is generally recommended to keep the sun and prevailing winds on the walkers back.

Camping and accommodation in small coastal villages and national park campgrounds can be a rewarding experience.

Figure 10. Signature Trail 3. Solitary Islands Coastal Trail



7.5 Solitary Islands Coastal Walk

DESCRIPTION

Located just to the north of Coffs Harbour on the central north coast, the Solitary Islands Coastal Walk stretches over 60km from Red Rock to Sawtell south of Coffs Harbour.

The Islands themselves are visible for much of the walk and are protected as nature reserves surrounded by marine parks where temperate and tropical waters meet.

The coastal trail itself traverses coastal reserves and parks through lush rainforest, over rugged coastal headlands and along beaches.

The trail is 60km long and can be consumed in one longer walk of 4 days or in shorter segments ranging from several hundred metres through to half and full days with 2 day options available.

Good information exists for this experience as it is predominantly in place.

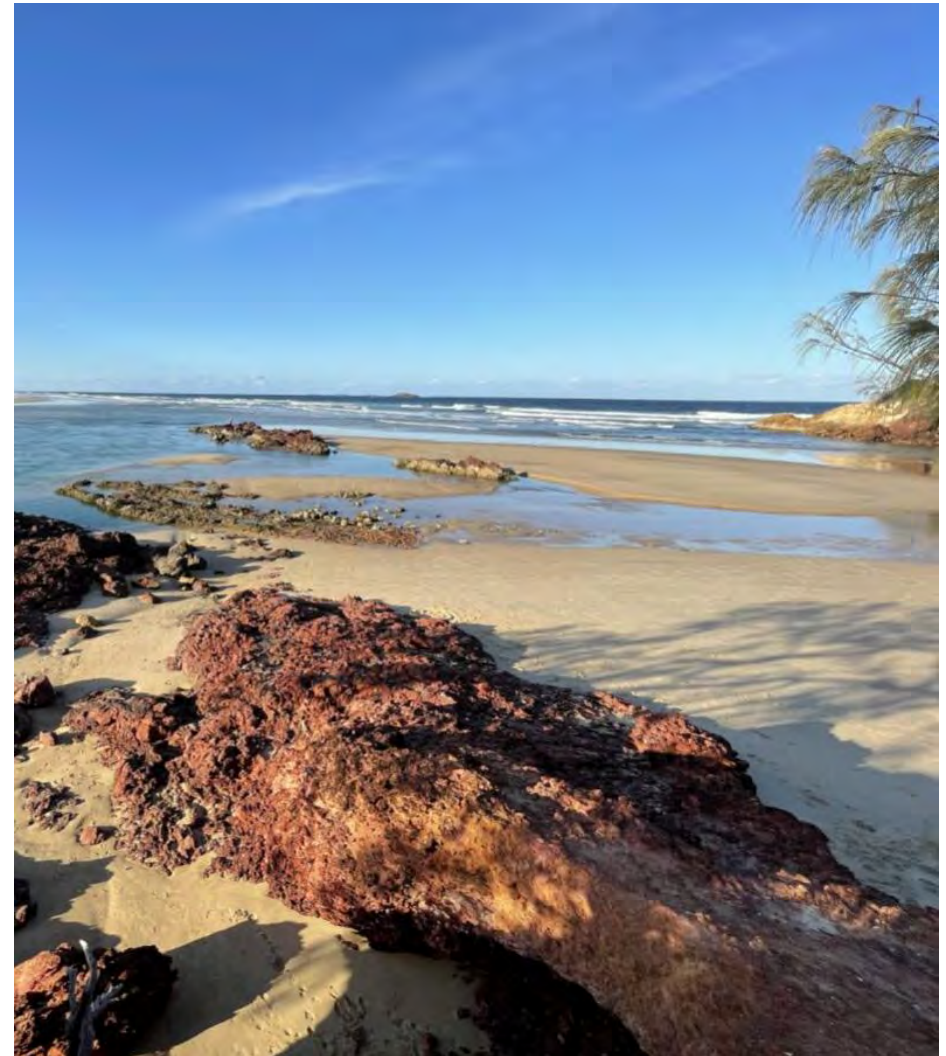
START AND FINISH

The trail can be walked north to south or south to north. The majority of the information on the walk is produced assuming north to south use.

The coastal village of Red Rock forms the northern most point of the walk. The town can be reached off the Pacific Highway and contains a general store and other facilities.

In the south, the trail concludes at Sawtell just south of Coffs Harbour.

Coffs Harbour provides the ideal start or finish point for the walk, whether completed in sections or in full.



THE TRAIL ROUTE

Working south from Red Rock, the trail heads south along the beach after crossing the headland to Corindi Beach where coffee and other services are available. A feature of the walk is the access to small villages and services along the route.

The trail heads further south along the beach to the township of Arrawarra, with a low tide required to cross the river. The fish traps are also exposed at low tide showcasing the Gumbaynggirr people's culture and history of the region.

Continuing to traverse around the headlands, the trail arrives at Woolgoolga.

Woolgoolga Headlands offers spectacular views of Solitary Islands, nearby beaches and headlands. Whale spotting in May and November is spectacular.

Further south, the Moonee Beach to Park Beach is an ideal family oriented walking trail. Over Green Bluff and through rainforest with continuing excellent views of the Islands offshore. The trail now finds itself passing northern suburbs of Coffs Harbour on its way to Park Beach with views over Muttonbird Island.

Leaving Park Beach and Coffs Harbour, the trail heads south along beaches and easy walking tracks for the trail as it passes Boambee Headland and then along Murrays Beach to Sawtell Beach, the concluding location of the walk.

There is good information on the trail and the suggested itinerary is:

Day 1 – 18.5km from Red Rock to Woolgoolga

Day 2 – 17.1km from Woolgoolga to Sandy Beach

Day 3 – 15km from Moonee Beach to Park Beach

Day 4 – 12.4km from Park Beach to Sawtell.

HIGHLIGHTS

The highlight of this existing walk include the views over the Solitary Islands, the expansive beaches and coastal views and the access to villages and exit points. The trail passes through various vegetation communities and passes through culturally important areas for the Gumbaynggirr people.

LOGISTICS

Coffs Harbour is a large regional city with access to an airport and a range of suppliers, transport services and other essential provisions for the walking market.

The city also has taxi services and a range of transport options although transport to many of the smaller towns on the Solitary Islands Coastal Walk is limited or non-existent.

ACCOMMODATION.

Accommodation options are plentiful along the route in the smaller villages and the larger City of Coffs Harbour. During peak seasons can be expensive and difficult to find.

The larger resorts situated just north of the Coffs Harbour City area also front (in many cases) the walk.

Most of the smaller villages have coastal caravan and camping parks and holiday rentals with some having larger holiday complexes.

COMMERCIAL OPPORTUNITIES

There are many commercial opportunities for business on the Solitary Island Coastal Walk although some caution needs to be exercised in forecasting the opportunities as the walk has been in existence for some time and the market should understand those opportunities. Opportunities include:

- Transport options to and from Coffs Harbour including potential airport pick up and drop off services,
- Accommodation options designed for walkers – especially the markets not seeking to stay in campgrounds. This may include cabins, glamping and other roofed accommodation, generally located outside the national parks to reduce visitor impacts.
- Guided tours including First Peoples experiences in what is a rich and cultural landscape.

COSTS

The walk is essentially in place. Ongoing maintenance and marketing could aid in the benefits of the walk being realised to communities. Continued investment from Council, NSW National Parks Service and other land managers will continue to help position the walk as a great 2–4day option or ideal 2–3 day weekender

BARRIERS AND GAPS

The walk is essentially in place. No new trails need to be constructed for it to succeed and be a critical part of the GNCT and its hero experiences.

Ongoing governance will be essential to ensure it fits within the overall plans for the broader trail.

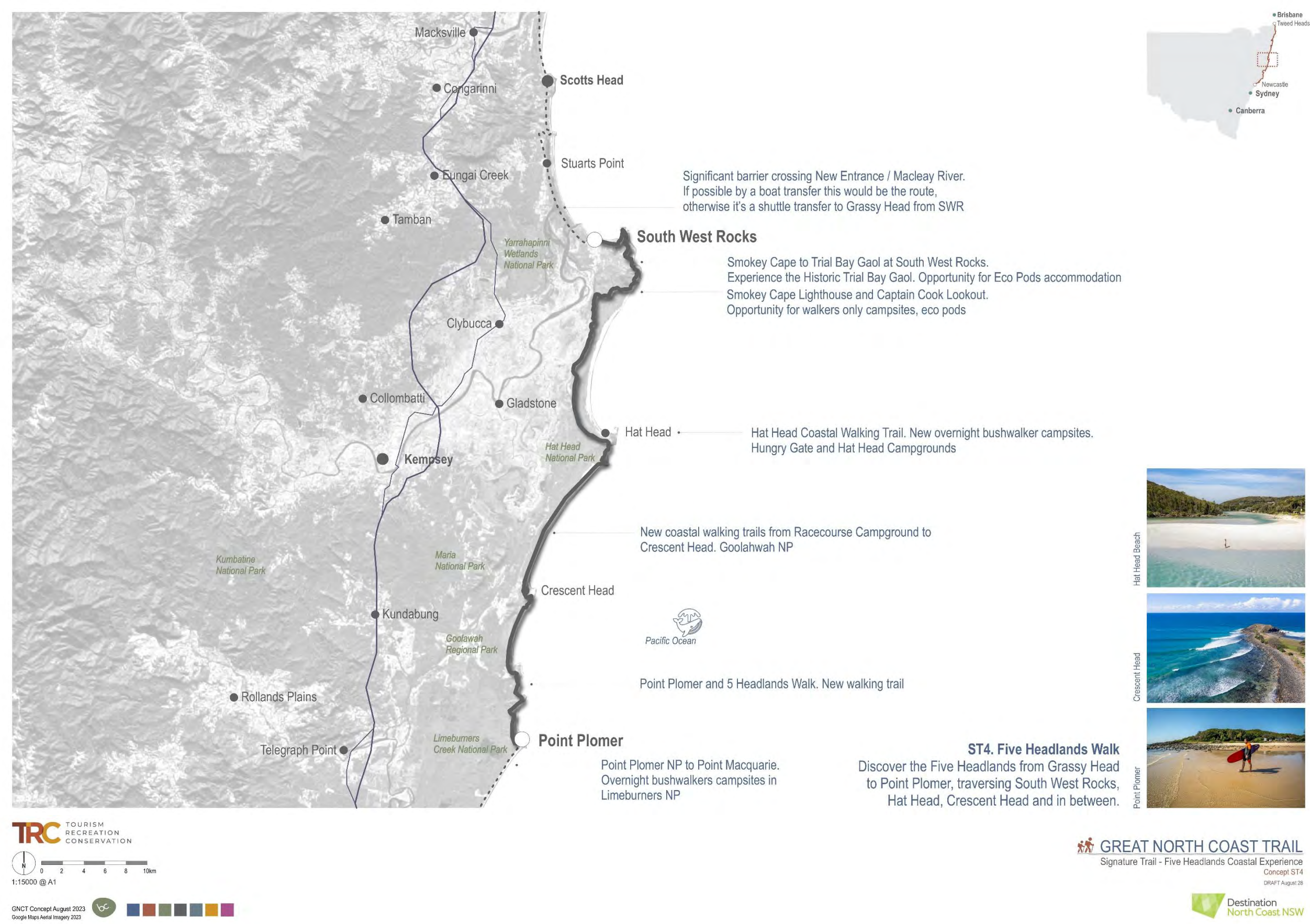
Summary

The Solitary Islands Coastal Trail is a superb coastal trail experience that can form a key part of the Great North Coast Trail. It offers walking lengths and options for many markets and is centred around the regional city of Coffs Harbour with its accommodation, transport and services options.

The views and coastal scenery are superb.



Figure 11. Signature Trail 4. Five Headlands Coastal Experience



7.6 Five Headlands Coastal Experience

DESCRIPTION

The Five Headlands Coastal Experience on the Macleay Valley Coast is currently in the planning phase and will be a catalyst for the creation of an exceptional array of coastal experiences. While the Five Headlands Coastal Experience Business Case²⁶ puts forward a mixture of walking and some kayaking, the walking elements are included in this potential hero experience.

The Five Headlands Coastal Experience will connect existing walking tracks, attractions, and camping grounds in Arakoon, Hat Head, Goolawah and Limeburners Creek Nature Park as well as numerous headlands managed by Kempsey Council.

Connection of the most notable tracks in the region will eventually provide close to 100km of experiences within a zone – most of which are covered in this hero walking element.

The overall experience can appeal to a range of walking markets including both day walkers and multi day walkers.

The experience defined in the business case includes kayaking to get around the mouth and delta of the Macleay River.

South of Smoky Cape Lighthouse, the experience is a series of rocky headlands connected by a series of beaches. In some cases, the beaches have alternative inland routes to avoid long sections of sand walking in adverse weather and tidal conditions. This includes the route south of Smoky Cape where Kilmores Track provides an inland route.

The track continues to head south (assuming walkers are doing this experience from north to south, but it can be reversed) through to the southernmost point on the experience, Point Plomer.

START AND FINISH

While the experience zone has a north and south bookend to it, the two-to-three-day sections that can form a hero experience can be consumed within the zone and curated to the needs of the target walkers.

The south end of the zone is approximately 60km north of Port Macquarie. The northern end is located near Grassy Head on the northern end of the Macleay River mouth.

Entry and exit points and start and finish points for components of the trail are plentiful but transport options are limited within the walk zone.

THE TRAIL ROUTE

Figure 11 provides the map with the proposed walk location and the trail section lengths (taken from the 2022 Five Headlands Coastal Experience Business Case.)

The trail and experience zone can be broken into sections, with each section able to be consumed in two-day blocks. The trail traverses headlands, beaches, coastal forests and woodlands and intersects with many smaller towns and villages of the central coast.

The northern section may be optional as a walking product as much of it is kayak able to avoid the crossing of the Macleay River near South West Rocks.

The experience connects local coastal communities and major attractions within the national parks including Smokey Cape Lighthouse and Trial Bay Goal. It also connects existing NPWS accommodation and Macleay Valley Coast Holiday Parks owned by the Kempsey Shire Council.

The communities closest to the trail alignment include Crescent Head, Hat Head, South West Rocks, Stuarts Point and Grassy Head. Each of the proposed trail sections shown in the map below also is designed to end or start in one of the smaller

²⁶ Five Headlands Coastal Experience Business Case September 2022. TRC Tourism for Kempsey Shire Council

communities or villages providing economic activity to the region and also convenience for finding accommodation and services for walkers.

HIGHLIGHTS

The coastal experience has multiple highlights including as the name of the hero experience suggests, five outstanding Headlands connected by long and outstanding beaches and coastal fringes.

LOGISTICS

Whether the experience is tackled from the north or the south, and whether or not the sections are used to break down the 100 km into two and three-day elements for the target markets, transport options are limited other than for self-drive or longer distance walkers.

Port Macquarie is serviced by a regular passenger service airport and is only 1 hour away by car to the south.

Walking equipment and outfitting services exist in Port Macquarie, whereas basic food and other supplies such as fuel can be found in each of the smaller villages along the route.

ACCOMMODATION.

Accommodation options are plentiful in the region, although during peak seasons can be expensive and difficult to find.

Accommodation can be found in various forms in the villages and towns along the route, and that form the bookends to each of the sections described in the business case. These include:

Grassy Head, Stuarts Point, Horseshoe Bay Holiday Park, Smokey Cape, Hat Head, Hungry Gate Campground, Crescent Head, Racecourse, and various campgrounds. For people starting or finishing their experience, Port Macquarie offers a full range of accommodation options from caravan parks to 5 star properties.

COMMERCIAL OPPORTUNITIES

There are many commercial opportunities for businesses on this experience cluster of trails. They include:

- Transport options to and from Port Macquarie including potential airport pick up and drop off services,
- Estuary crossings over the Macleay River for the walking market that may not wish to kayak,
- Accommodation options are designed for walkers – especially the markets not seeking to stay in campgrounds. This may include cabins, glamping and other roofed accommodation, generally located outside the national parks to reduce visitor impacts.
- Guided tours including First Peoples experiences in what is a rich and cultural landscape.

COSTS

The business case and feasibility study completed in 2022 has an indicative cost of \$2,035,000 (capital) to complete the essential components of trail to make the experience an outstanding coastal walk.

BARRIERS AND GAPS

The business case identified several areas that may impact performance and sought to provide alternatives where possible. This included over 60 km of beach walking in the 100 km of the experience zone. While less than ideal due to the possible tide, sand conditions and shared use of the beaches with 4WDs in some cases, alternatives were few and far between. Some of these sections may be able to be overcome by commercial service providers offering transfer services and guided tours making the experience more enjoyable.

The condition and grade of the existing trails is varied and may not always provide the desired experience for the markets being targeted in this overall walk.

Kayaking is proposed in the business case, yet for the GNCT, walking is the preferred form of activity. Crossing the rivers can be problematic and will require some form of alternative transport such as a taxi, tour operator or ferry (punt) where appropriate.

Summary

The Five Headlands Coastal Experience offers a unique and flexible set of walking options for visitors to enjoy. The beach walking can be problematic but may be able to be overcome in the future with commercial providers.

The headlands offer outstanding views and make the connection of them into an experience worthwhile.

Visitors can 'bite-off' smaller sections of trail for weekends, day walks or longer depending on their needs.

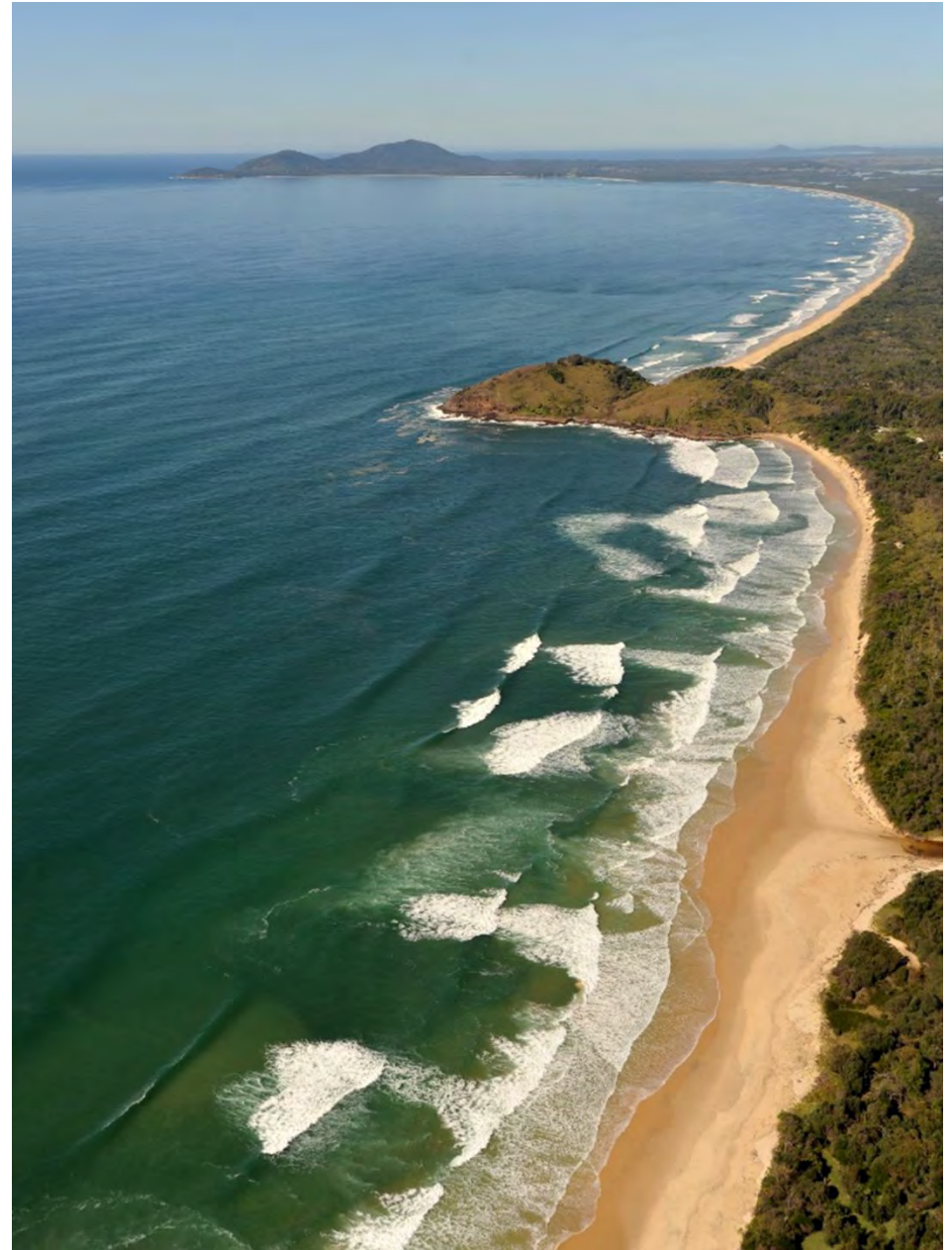


Figure 12. Signature Trail 5. Port Macquarie to Harrington



ST5 Port Macquarie to Harrington 'Three Brothers Mountains' Coastal Walk
Access to beach villages, historic lighthouses, wonderful beaches, rainforest and long views from cliff tops over the Pacific Ocean.

7.7 Port Macquarie to Harrington Coastal Walk

DESCRIPTION

The Three Brothers Mountains Coastal Walk (working title) is a 65km walk between Port Macquarie and Harrington. These three mountains dominate the coastal hinterland from Porth Macquarie in the north to Taree in the south. Dooragan is called North Brother, Booragan is South Brother, and in between Mooragan, or Middle Brother. For Birrbay (Birpai) people the three mountains have enduring cultural significance and are connected through storytelling for millennia.

The trail predominantly traverses national parks, beaches, villages and coastal headlands with outstanding views and some remote sections of trail, with a wide variety of camping options, with new walkers only campsites breaking up long beach walking sections.

The trail is designed for multi day walking and contains whale watching, swimming experiences and immersion in Crowdy Bay National Park along its length.

The trail itself is grade 3 and will take the average walker 3–4 days to walk it completely.

START AND FINISH

The trail is from Port Macquarie in the north, to Harrington in the south, with the coastal villages and headlands of Lake Cathie, Bonny Hills, North Haven, Laurieton, Camden Head, Diamond Head, Crowdy Bay and Crowdy Head in between.

The trail can be walked north to south or south to north. The majority of the information available on the walk is currently limited however assumes north to south use.

THE TRAIL ROUTE

Walking predominantly occurs at the northern end of the section, taking in Sea Acres National Park and Tacking Point Lighthouse, returning to Port Macquarie.

The general itinerary is for 3–4 days walking and includes some long beach walking.

Where coastal trails do not exist, and in lieu of new trail construction (costed but feasibility required), low tide walking is recommended to allow for firm sand walking along Tacking Point / Light House Beach, Lake Cathie Beach, Rainbow / Bonny Hills Beach, Dunbogan Beach, Kylies Beach, Crowdy Head Beach and Harrington Beach.

The Headlands will be traversed with new sustainable trail construction to allow a through route for walkers and closing any gaps identified along the route where formal walking trail does not currently exist. In some instances, road walking behind coastal dunes along formed roads and access trails may be required and may serve as appropriate alternative in unfavourable weather conditions.

The trail commences from the Hastings River Trailhead of Town Beach and Gaol Point of Port Macquarie taking in the Sea Acres National Park and the historic Tacking Point Lighthouse. Walkers then descend from Tacking Point on new coastal access trail to Tacking Point / Lighthouse Beach. A new walker's campsite may be considered at the mid-point along this stretch of adjacent Ocean Drive at the 14km mark, or walkers may push on for a full 22km day to Bonny Hills where existing holiday parks and campgrounds exist, however no dedicated walking campsites exist.

Day two takes in Grants Head and Grants Beach to North Haven (6km). Walkers meander through Laurieton to Camden Head, Gogleys Lagoon and Kattang Nature Reserve and Historic Pilot Beach, Perpendicular Point to Dunbogan Beach. Long beach walking along Dunbogan Beach to spectacular Diamond Head does not disappoint, with a myriad of camping opportunities here. Although it wise to preplan and book ahead here, as at times it is a very popular site serviced by live in caretakers, Kylies Beach Campground south of Diamond Head offers walkers quiet respite from crowded campgrounds. A longer day at 27km, there is much to take in.

Day 3 takes in Crowdy Bay National Park with upgraded existing access trails amongst coastal vegetation and dunal systems, walkers can opt to walk along the beach if weather is favourable or take the access trail to an upgraded Abbey Creek Picnic Ground (9km). Another 3km and walkers will arrive at Crowdy Gap Campground which also remains a cultural camping site. Due to the lack of light pollution in this area, stargazing and dark skies experiences in the shadow of the Three Brothers Mountains makes for an unforgettable experience. Campsite bookings are essential through NSW NPWS.

Day 4 takes in Crowdy Head and Crowdy Head Lighthouse and down to Harrington Beach, with Harrington Littoral Rainforest nestled at the southern end. Walkers discover the Manning River, while walking along the Harring Inlet training wall, ascending to Pilot Hill Lookout, and the Maritime Memorial, completing the short day into Harrington at 10km, transferring to Taree, or continuing south along the GNCT by navigating the Manning River by a bookable boat transfer arriving at Manning Point a further 4km along the journey.

HIGHLIGHTS

In constant view along the way are The Three Brothers Mountains, Crowdy Bay National Park, Diamond Head, Sea Acres National Park and Sea Acres Rainforest Centre, Kattang Nature Reserve, Tacking Point and Lighthouse, magnificent beaches, secluded stretches of wide-open beaches, migrating whales (seasonal), and uncrowded camping areas for walkers.

LOGISTICS

Port Macquarie is well serviced with an airport, with a short vehicle transfer and Harrington is serviced by Taree Airport, which requires a vehicle transfer as Taree is 32km inland from the coast, to get the start and finish of the trail.

Excellent road connections between both the start and finish of the trail with vehicle transfers available to regionally serviced airports. The Manning River Boat transfers remain unresolved, however, present as an opportunity to a local business enterprise in Harrington to service this opportunity for walkers, visitors and general community wanting to cross the Manning River.

ACCOMMODATION

The trail has many accommodation options along its length, and mostly suited to walkers – however it can be difficult to book in peak seasons.

Each of the smaller towns on the trail have some options, and some holiday park campgrounds exist along the route.

Byron Bay and Ballina at either end of the route have many options, however, there are non-existent ‘walkers’ only’ campsites along the route, due to high numbers of visitors to the region. Consideration must be given to dedicating ‘walkers’ only’ campsites, presenting an opportunity for the region.

COMMERCIAL OPPORTUNITIES

There are many commercial opportunities for business on The Three Brothers Coastal Walk. These include:

- Transport options to and from Port Macquarie and Taree / Harrington, including potential airport pick up and drop off services.
- Boat transfers across the Manning River from Harrington Inlet to Manning Point.
- Accommodation options designed for walkers only – especially the markets not seeking to stay in busy holiday campgrounds. This may include specific walkers’ only campgrounds, generally located inside national parks and monitored by commercial operators and/or onsite caretakers in Crowdy Bay National Park.
- Guided tours including Birrbay (Birpai) First Peoples experiences in what is a rich and cultural landscape which includes The Three Brothers Mountains and storytelling which has survived for millennia.
- Food and water provisions along the trail.

COSTS

Continued investment from Councils, NSW National Parks Service and other land managers will continue to help position the walk as a great 3–4 day option.

BARRIERS AND GAPS

- Long sections of beach walking can make the trip difficult in some weather and tidal circumstances.
- River crossings by boat – transfer bookings need to be made in advance to ensure reliable service.
- Difficult terrain to be avoided on high-tide sections of the walk.
- In some sections, there is very little fresh water available. In addition, rough seas can make some sections of the beach walking impassable in all tidal conditions.
- New coastal trails and access tracks require upgrading.

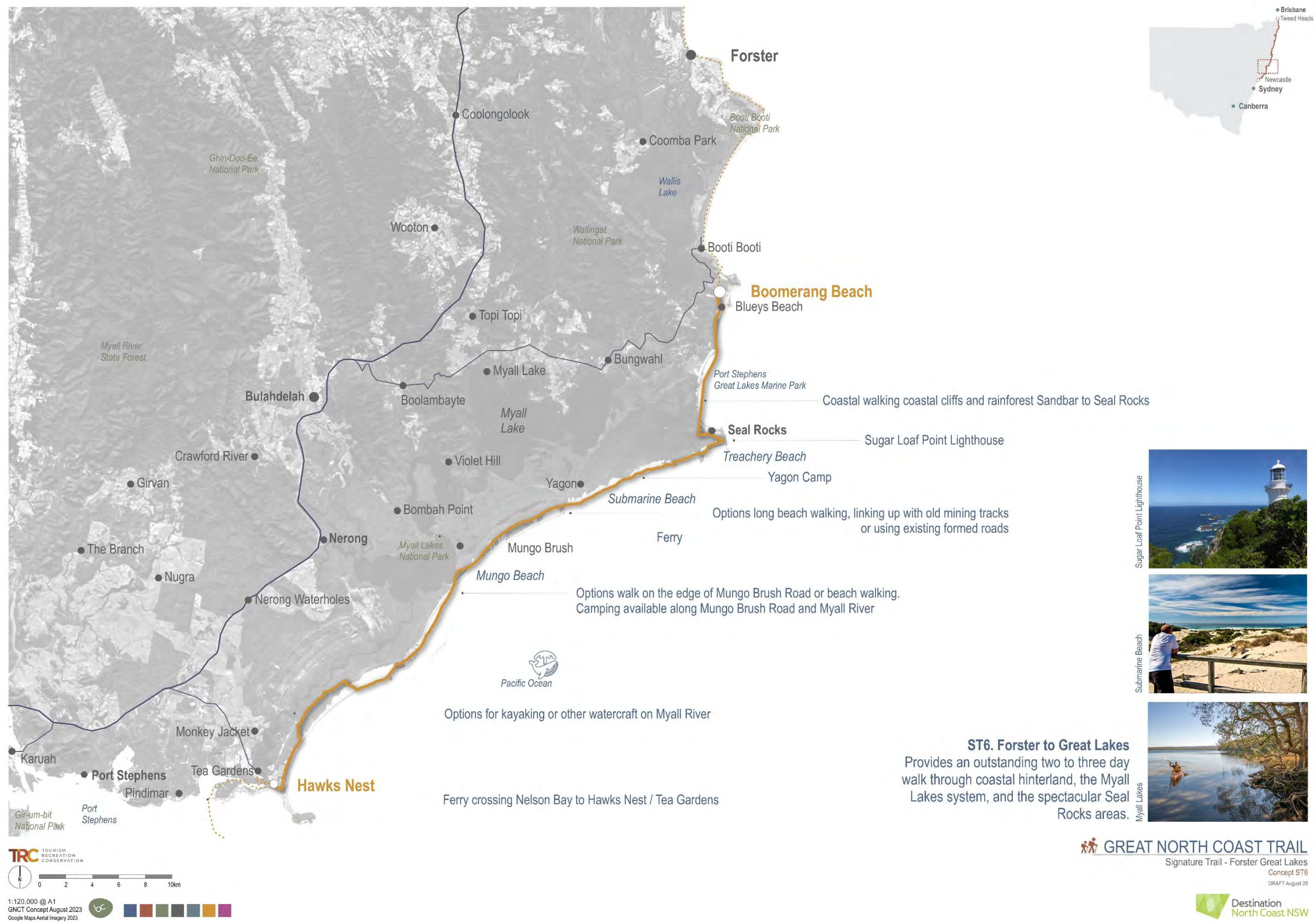
Summary

This coastal walking experience takes in the Three Brothers Mountains, which are culturally significant to the Birrpai (Birpai) people. Excellent coastal headlands, beaches, lighthouses, patches of rainforest, maritime history and remote locations ensure a challenging yet rewarding journey, with lookouts and coastal views along the entire route.



View of the North Brother – Dooragan (left) and Middle Brother (Mooragan (middle) from Tacking Point Lighthouse.

Figure 13. Signature Trail 6. Forster to Great Lakes



7.8 Forster to Great Lakes

DESCRIPTION

Situated at the southern end of the proposed GNCT (working title) – the Great Lakes element of the GNCT provides an outstanding 2–3 day walk through coastal hinterland, the Myall Lakes system, and the spectacular Seal Rocks areas. It includes beaches, headlands, rocky outcrops, and woodlands, and has the potential to be extended to include aquatic-based experiences should the consumer choose to do so, and the commercial support be there.

This component of the walk can be curated by the individual who can choose how much they undertake and where and how they enter and exit the broader trail. The highlight components of the trail can be undertaken in three days from Boomerang Beach in the north, to Tea Gardens in the south. Accommodation is currently limited south of the lighthouse, presenting an opportunity for glamping, tents or cabins suited to the walking product.

START AND FINISH

The experience can start at either Tea Gardens in the south, or Boomerang Beach (just south of Forster) in the north.

THE TRAIL ROUTE

Heading south, the trail leaves Boomerang Beach and traverses the hills using a mixture of old and proposed trails that have the potential for outstanding views over the Pacific Ocean and down into Blueys Beach.

Making your way further south, the trail heads to Cellito Beach (proposed new sections) where a gentle beach walk provides the opportunity for a swim in warmer weather (taking care to avoid rips and other coastal hazards) before popping out at Sandbar Beach.

Crossing the river (sandbar) at Wamwarra Creek can be safely done for much of the year. Where it cannot be done, a transport option needs to be considered for the longish traverse (by car or other motorised transport) around Smith Lakes before re-joining the coast at Number One Beach or Seal Rocks.

Taking the lesser used coastal tracks and roads south through Seal Rocks (overnight option), the trail passes the famous Sugarloaf Point Lighthouse. The Lighthouse is spectacularly located on a point with sweeping views over the Pacific Ocean and the Humpback Highway where the whale migration in autumn and spring occurs.

From Sugarloaf Point, the trail heads down to the beach with options for the walkers to walk on the beach or utilise some of the network of management trails located in the foredunes and coastal woodlands just inland. Passing though Treachery Camp (Treachery Beach), and Yagon Campground, or inland on some of the old trails and roads, the scenery is different to the first sections of the walk. Coastal heath and woodlands are alive with birds and animals, and also can have a great show of wildflowers at the right time of the year.

Heading further south (via inland or beach–walking options), the trail pops out at Dees Corner campground where the land is very narrow, with White Tree Bay on the western side and the Pacific Ocean on the eastern side.

From here, south to Tea Gardens, several options exist for walkers, depending on their preferences and the prevailing weather. One option is to follow the Mungo Bush Side Road south into Sandy Point and Dark Point Aboriginal Place before continuing on to Tea Gardens. The other option is to follow the beach, noting that there is the potential to be picked up earlier at any of the points along the way.

HIGHLIGHTS

Outstanding coastal scenery, walking options on beaches or in coastal woodlands, and spectacular hills including Sugarloaf Point Lighthouse.

LOGISTICS

The trip is designed to be able to be undertaken as a 2–3 day weekend or long weekend trip, or to be undertaken in smaller sections with appropriate pick-up points along the way. Road access is available for 2WD vehicles at multiple points on the trail. Food and other supplies are available at Forster and Tea Gardens with some food available at Seal Rocks.

ACCOMMODATION

Forster in the north is a large town with multiple accommodation options. Further south the options for roofed accommodation include Seal Rocks, Sugarloaf Lighthouse, and Tea Gardens. Accommodation is also available at commercial facilities near Cellito Beach. Camping is available at multiple locations throughout the walk.

COMMERCIAL OPPORTUNITIES

There are many commercial opportunities for businesses on this section of trail. They include:

- Transport services based in Forster or in Tea Gardens for ferrying walkers along the trail, bypassing the Sandbar when it is impassable, etc.
- Accommodation options – both packaging to make it accessible for walkers, and commercial ‘glamping, especially in the Bombah Broadwater sections south of the Lighthouse
- Outfitting stores and supplies in Forster (to service this section and other walks), and
- Guided tours, including First Peoples experiences, in a rich cultural landscape.

BARRIERS

Several sections of new trail are required to complete the walk as proposed. These include sections around Blueys Beach and Cellito’s Beach, and south from Sandbar to Seal Rocks (components).

The crossing at Sandbar also requires care during times of high water – and may become impassable blocking north to south (or reverse) movements without a significant bypass (by vehicle).

Accommodation options south of the Seal Rocks area are limited until you reach Tea Gardens, where there is an abundance of commercial accommodation. Camping options exist for those who are carrying their own tents and equipment.

Long stretches of beach walking in times of high wind or adverse tidal and beach conditions may also prevent enjoyment of the area for certain markets.

Options exist along old mining roads and management tracks inland in the coastal forests and woodlands, which offer pleasant walking and the chance to interact with wildlife.

Alternative finishing (or start) points exist near Bombah Broadwater or at Dark Point (or nearby), with vehicle access to take the walkers back into Tea Gardens.

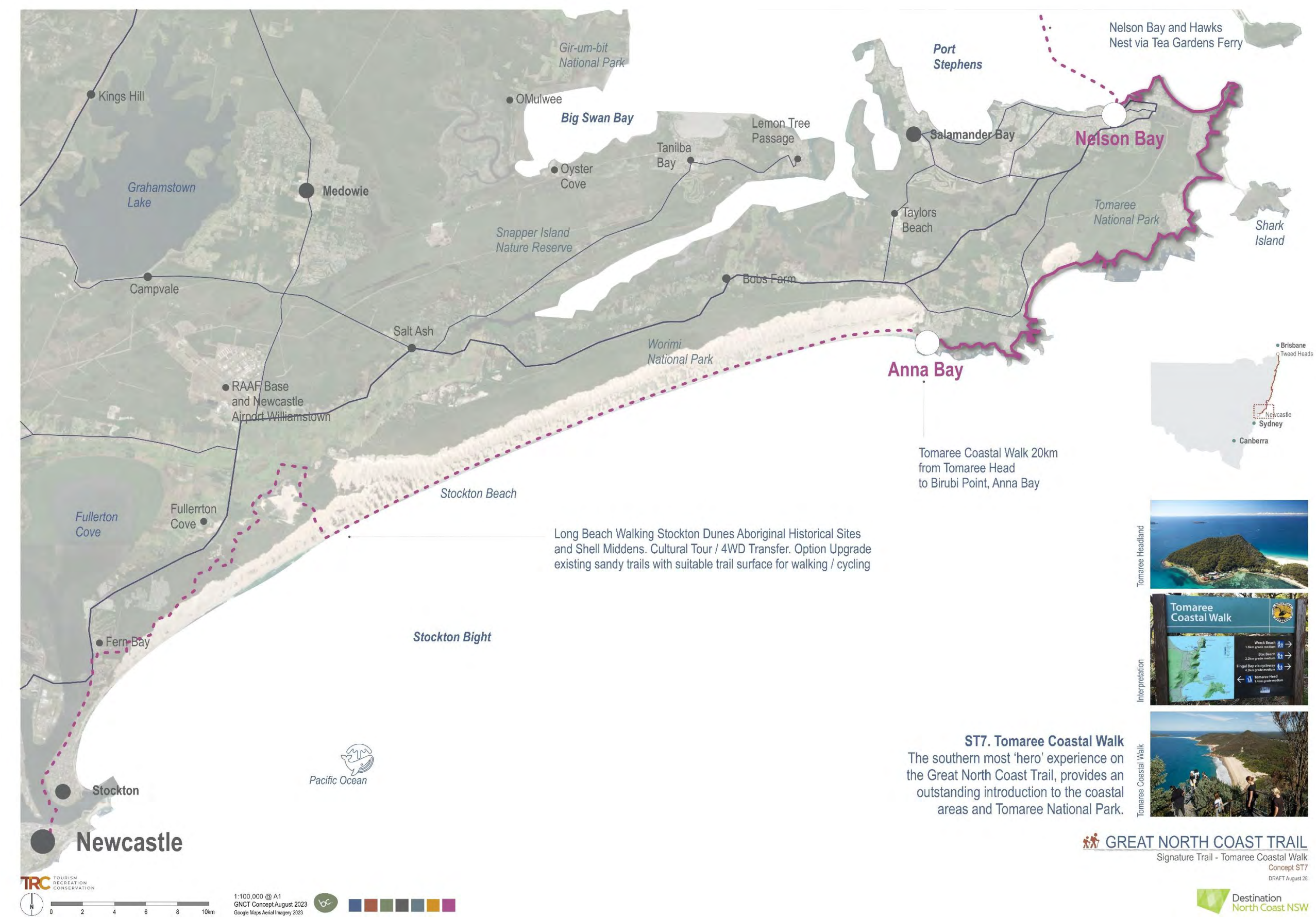
Summary

A strong 2–3 day experience with room for development of further glamping or hut-based accommodation along the path. Several sections of trail need to be developed to make it suitable for the experience.

With investment and the support of the New South Wales National Park Service, this section (subject to a previous feasibility study – Great Lakes Walk and Aquatic Trail but since modified) has significant potential given its raw beauty and proximity to Newcastle and Sydney.

Transport options to and from the walk from Sydney and Newcastle are reasonable, with an airport at Port Macquarie and Newcastle. Shuttle services are a commercial opportunity should the walk take off.

Figure 14. Signature Trail 7. Tomaree Coastal Walk



7.9 Tomaree Coastal Walk

DESCRIPTION

Located just to the north of Newcastle, the Tomaree Coastal Walk offers spectacular headland walking with extensive views over the Pacific Ocean.

Located just outside the formal study area of the Destination North Coast region (the signature product is located within the Destination Sydney and Surrounds Northern region), it offers a product that is very close to Newcastle and one that fits a weekend or 2-day walk itinerary, with optional add-on experiences such as quad bike and cultural tours in the southern component.

The walk itself is 20km long and traverses existing and new trails from Tomaree Head to Birabee Point within Tomaree National Park.

The walk offers a range of experiences from short to multi-day walk options. It forms part of the Worimi Aboriginal cultural landscape, an area steeped in history, with the rich WW11 heritage of Tomaree Head, volcanic peaks delivering world-class views, secluded beaches and bays, whales (during the season), wildflowers, and abundant wildlife.

The walk is located north of Anna Bay and encompasses the delightful coastal towns of Nelson Bay and Shoal Bay – part of the Port Stephens area.

START AND FINISH

The experience has the option of multiple entry and exit points depending on what the visitor is seeking to achieve. The longer version of the walk (20km) begins in the southern component near Iris Moore Reserve, just to the south of the town of Anna Bay. The northern component of the walk concludes (or starts) at Tomaree Head, to the east of Shoal Bay.

Entry and exit points exist along the route in many locations, however, cars are required to access the walk in most locations.

THE TRAIL ROUTE

NSW National Parks Service has invested over \$6 million in the walk and associated infrastructure. The trail itinerary in the Tomaree Coastal Walk Master Plan²⁷ provides for a 2-day experience, with off-park accommodation (there is no accommodation planned within the National Park, in part due to the commercial accommodation surrounding the walk).

From north to south (as per the description in the NSW National Parks Service notes), the trail progresses through the spectacular Tomaree Headland. The area includes WW11 historic relics, including gun placements.

Traversing the eastern flanks of Quarry Hill and Green Hill, the trail heads south with views back to Tomaree Headland. The trail provides access to three secluded beaches (Zenith Beach, Wreck Beach and Box Beach) on its way to Fingal Beach.

Day 1 allows for 11.5km of walking, reaching Samurai Beach / Koala Sanctuary south of Fingal Bay.

Day 2 traverses the coastal outcrops around Morna Point to Boat Harbour Headland with access to Boat Harbour. It then passes Kingsley Beach on the way to Anna Bay and Birubi Point, offering spectacular views of the coast and the Pacific Ocean.

Anna Bay neighbours the Worimi Conservation Lands, a declared Aboriginal Place, as well as passing through several small villages. The neighbouring Worimi Aboriginal Lands offers the opportunity to finish (or start) the walk with 4WD tours, camel rides and quad bike tours along the way.

²⁷ Tomaree Coastal Walk Master Plan 2020. Department of Environment, Energy and Science.

HIGHLIGHTS

- Whether heading north to south, or south to north, the walk and proposed additions offer world-class headlands, whale watching, access to cultural experiences in the south through the Worimi Aboriginal Lands and WW11 historical features. Tomaree Headland is spectacular.
- Tomaree NP is the second most visited in NSW.
- Access to the many small villages along the walk and the popular Nelson Bay offer accommodation options for the walkers undertaking the entire route.

LOGISTICS

Whether starting in the south or north, access is via the same route on the B63 road north of Newcastle. Visitors have access to Newcastle airport with regular services to all Australian destinations. Car hire is available at Newcastle airport.

Residents from Sydney have good access to the region through the train services and the M1 motorway.

Walkers heading north from Nelson Bay have access to the ferry service connecting Nelson Bay and Hawks Bay.

Vehicle access to the trails in the area is relatively straightforward, although public transport options are limited. As part of the Master Plan, some car parks are being upgraded and will include accessible parking options.

ACCOMMODATION

Accommodation options are plentiful in the region, although during peak seasons can be expensive and difficult to find.

Nelson Bay, Shoal Bay, Anna Bay and Fingal Bay all have commercial options including BnBs and caravan parks.

Further south, Newcastle is a major regional city and contains all levels of accommodation. It also bookends the Great North Walk from Sydney to Newcastle.

COMMERCIAL OPPORTUNITIES

There are many commercial opportunities for businesses on this section of trail. They include:

- Transport services from Newcastle to the start of the walk at Anna Bay or Nelson Bay, and possible pick-up points along the route (20km).
- Accommodation options –packaging to make it accessible for walkers, and commercial ‘glamping’, closer to the walk. This assumes some land could be available, but that is beyond the scope of this report.
- Outfitting stores and supplies in Newcastle and Nelson Bay (to service this and other walks), and
- Guided tours, including First Peoples experiences, in what is a rich and cultural landscape. This could be an extension of the current Worimi experience on offer south of Anna Bay.

COSTS

The project received \$6.7 million from the NSW government over 4 years to implement the Master Plan, including completing the walk, including ancillary infrastructure, interpretation etc.

While further funding could be utilised to fund aspects of the Master Plan that were not previously funded, the walk already offer a spectacular experience.

BARRIERS

Transport options in and around the walk are limited. Nelson and Anna Bay are both easily accessed by private vehicle from Newcastle.

Busy season accommodation can be expensive and hard to find. This walk is most likely to succeed as a shoulder and off-season addition to the tourism product of the region (a key design principle of the entire walk from Newcastle to the Tweed).

Summary

The southernmost ‘hero’ experience on the GNCT, the Tomaree Coastal Walk provides an outstanding introduction to the coastal areas and Tomaree National Park.

The walk has many options within its 20km length that can be undertaken as half-day or full-day walks, or over an extended period of two days.

The experience is located just north of Newcastle and is serviced by a good road network and regular passenger services into and out of Newcastle.

A ferry can deliver people northwards on the extended walk to Hawks Nest and Tea Gardens.

The NSW Government’s recent investment in this spectacular walk, will ensure it keeps its place among the great 1–3 day experiences in NSW and Australia.

7.10 Other signature walks

The seven signature walks chosen for this feasibility and business case present the highest return for effort. Other sections of the trail may qualify for signature trail status. The governance body established to progress this opportunity would have among its accountabilities the role of assessing any applications for variations.

7.11 Trail details

While the proposed trail has been described in summary form, a trail audit and product assessment has been completed for the entire trail. It should be noted that this audit has been completed based on three methods:

- Interviews with stakeholders
- Desktop research and previous cost estimates
- Field assessments.

The field assessments have been undertaken based on samples, and not a full survey of the entire proposal.

Figure 16 below shows the trail sections described but not contained in full in this report due to the details and complexity of the audit.

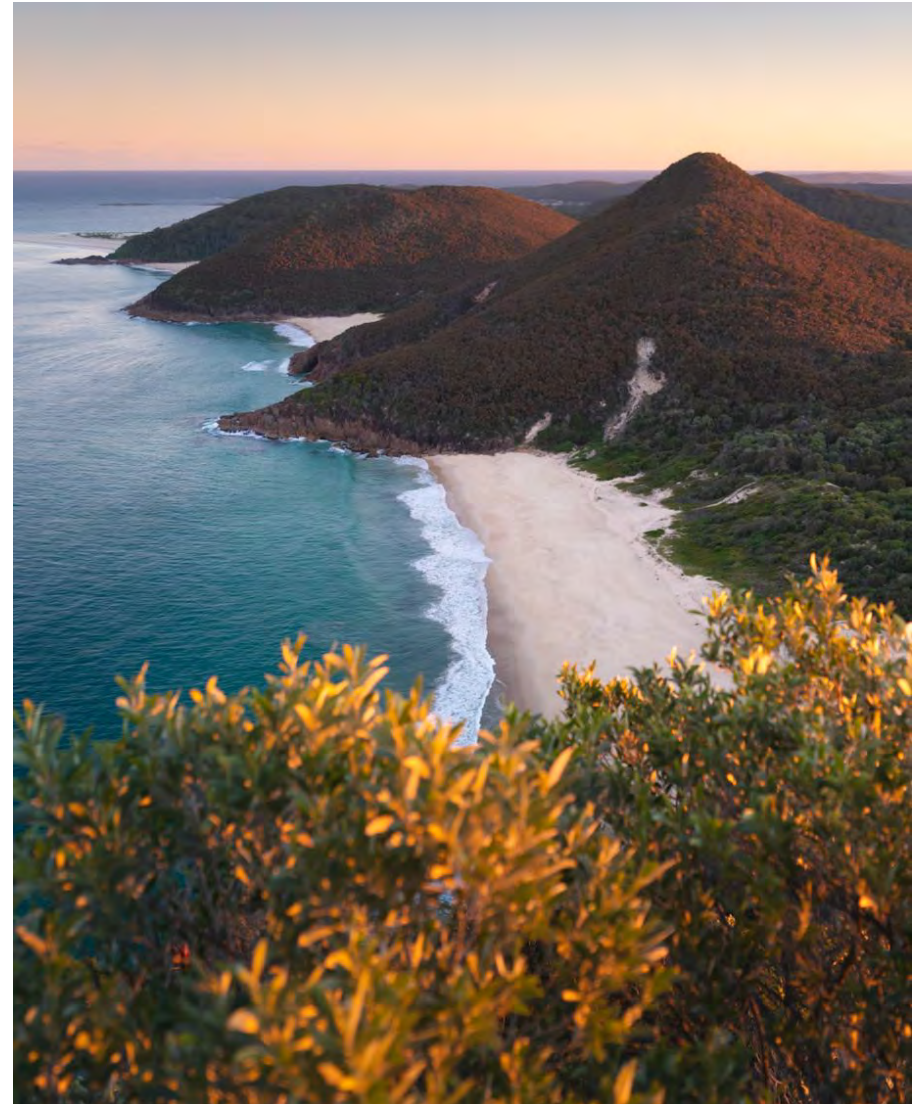
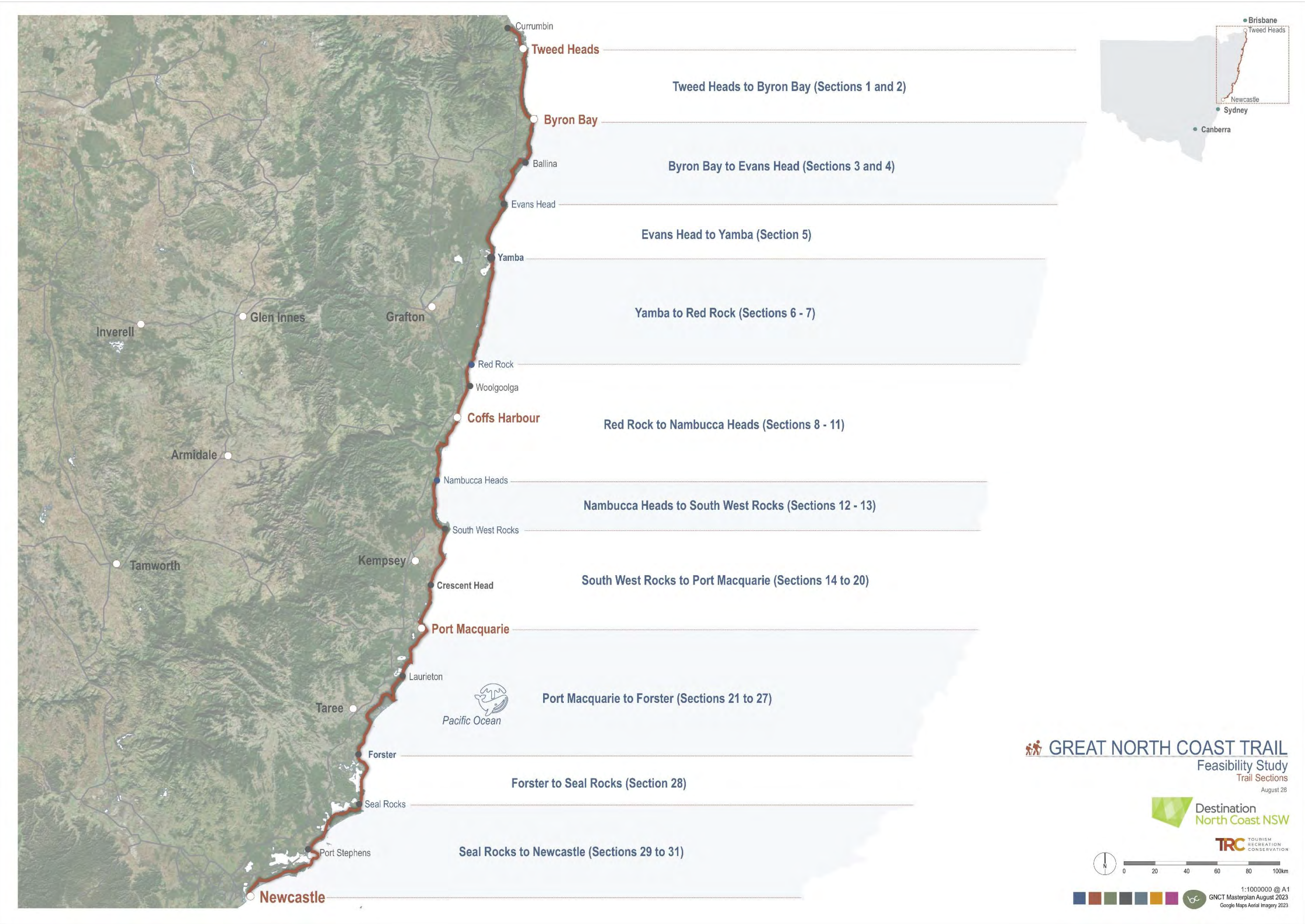


Figure 15. GNCT Trail Sections Providing Context for Trail Costs



7.12 Proposed trail costs

The following costings should be treated as estimates for the purposes of establishing a benchmark. They have not been assessed on the basis of engineering drawings, nor have they been subject to quantity surveyor assessments. They are based on a schedule of rates assessment that uses industry knowledge for the purposes of determining the costs and benefits of the entire trail, and each of the signature trails. The trail sections also are aligned to those presented in Figure 16. and a summary of the cost of each Signature Walk is provided in Table 3.

Note –trail sections in bold align to the respective Signature Trail (in some cases there are more than one trail section in a Signature Trail).

Table 2. Proposed trail costs

SECTION	SIGNATURE TRAIL	LOCATION	INDICATIVE WORKS	INDICATIVE COSTS	CURRENTLY FUNDED
1		Tweed Heads NSW/QLD Border to Brunswick Heads	Trailhead and waymarking at beginning or end	\$500,000	
2		Brunswick Heads to Byron Bay	Using existing tracks and the beach trailhead and waymarking	\$80,000	
3	Byron Bay to Ballina Walk	Byron Bay to Ballina	New coastal trail including footbridge and trailhead and waymarking	\$2,600,000	
4		Ballina to Evans Head	New coastal trail, new walkers-only campsite at Broadwater Headland, new walkers-only campsite at Broadwater Headland, trailhead and waymarking	\$2,200,000	
5		Evans Head to Yamba	Bundjalung National Park – long beach walking – mix new coastal walking trail and beach walk, beach access and bridging, trailhead and waymarking	\$1,800,000	
6		Yamba to Angourie	Upgrade informal coastal trails along Barri Beach and Pippi Beach trailhead and waymarking	\$70,000	
7	Yuraygir Coastal Walk	Yuraygir National Park (Angourie to Red Rock) 65km	New footbridge over Corindi River at Red Rock, upgrade existing trails, new walker campsite, trailhead and waymarking	\$2,600,000	
8	Solitary Islands	Solitary Islands Coastal Walk (Red Rock to Sawtell)	Trailhead and waymarking	\$100,000	

SECTION	SIGNATURE TRAIL	LOCATION	INDICATIVE WORKS	INDICATIVE COSTS	CURRENTLY FUNDED
	Coastal Walk				
9		Sawtell to Urunga	Upgrade fire access trails in Bongil Bongil National Park, new walker campsite, trailhead and waymarking	\$800,000	
10		Urunga to Jagun Nature Reserve (Oyster Creek)	Upgrade fire access trails through Hungry Head to break wall trailhead and waymarking	\$300,000	
11		Jagun to Nambucca Heads Nature Reserve (oyster creek)	Upgrade trails trailhead and waymarking	\$300,000	
12		Nambucca Heads to Scotts Head	Upgrade trails and provide walk in camp site trailhead and waymarking	\$900,000	
13	Five Headlands Walk	Scotts Head or Grassy Head to South West Rocks	Coastal trails upgraded, new camping areas, unavoidable beach walking in areas	\$750,000	
14		Smoky Cape Campground to Trial Bay Campground / South West Rocks	Funded and works progressing add trailhead and waymarking		
15		Smoky Cape Campground to Hat Head	Funded and works progressing, add trailhead and waymarking		
16		Hat Head to Cresent Head	Funded and works progressing, add trailhead and waymarking		
17		Cresent Head to Racecourse Campground	Funded and works progressing, add trailhead and waymarking		
18		Racecourse Campground to Big Hill Melaleuca Campground	Funded and works progressing, add trailhead and waymarking		

SECTION	SIGNATURE TRAIL	LOCATION	INDICATIVE WORKS	INDICATIVE COSTS	CURRENTLY FUNDED
19		Big Hill Melaleuca Campground to Point Plomer Campground	Funded and works progressing add trailhead and waymarking	\$70,000	\$4,800,000
20		Point Plomer Campground (Start of 5 Headlands Walk) to Port Macquarie	Upgrade Plomer Road with beach access for alternate beach walking trailhead and waymarking	\$150,000	
21	Port Macquarie to Harrington Coastal Walk	Port Macquarie to Bonny Hill	New coastal walking trail from Bonny Hills to Tacking Point Lighthouse (16km) New walkers-only campsite midpoint of Tacking Point / Lighthouse Beach.	\$2,400,000	
22		Grants Head / Bonny Hills to North Haven	Upgrade coastal walking trail over Grants Head to Rainbow Beach, trailhead, waymarking and some stone steps	\$1,200,000	
23		North Haven to Kylies Beach Campground	New Dunbogan Beach coastal walking trail from Diamond Head Campground to Beach Street trailhead and waymarking	\$500,000	
24		Kylies Beach Campground (Diamond Head) to Crowdy Gap Campground	Day visitor site upgrade, beach access and upgrade existing access tracks, trailhead and waymarking	\$600,000	
25		Harrington to Crowdy Gap Campground	New walking trail up to Crowdy Head Lighthouse trails, trailhead, waymarking and interpretation	\$500,000	
26		Manning Point / Harrington to Saltwater Point	New trails trailhead, waymarking upgrade, walk-in camp	\$600,000	
27		Saltwater Point to Forster / Tuncurry	New trails trailhead and waymarking	\$100,000	
28	Forster and Great Lakes walk	Forster / Tuncurry to Seal Rocks	New trails trailhead and waymarking	\$1,600,000	
29		Seal Rocks to Hawks Nest	New trails trailhead and waymarking	\$700,000	
30	Tomaree	Anna Bay to Tomaree Head	Currently funded and underway		\$6,700,000

SECTION	SIGNATURE TRAIL	LOCATION	INDICATIVE WORKS	INDICATIVE COSTS	CURRENTLY FUNDED
31		Newcastle Queens Wharf, Stockton Dunes / Worimi to Birubi Point 42km	Option to upgrade sandy tracks starting/finishing trailhead and waymarking	\$4,000,000	
			SUB TOTAL	\$25,420,000	\$11,500,000.00
			Detailed Design, project Mgt, Engineering and approvals	\$535,400	
			Contingencies (including planning)	\$5,191,080	
			TOTAL	\$31,146,480	

7.12.1 Summary of costs

To implement the entire GNCT – the costs would be in the order of \$25,420,000.

Detailed design and approvals would be in the order of \$535,400.

Contingencies should be allowed for (20%): \$5,191,080

TOTAL COST: \$31,146,480

The costs to construct the various Signature Trails are:

Table 3. Summary cost table of signature walks

SIGNATURE TRAIL	UNFUNDED COST	CONTINGENCY (20%)	TOTAL	FUNDING COMMITTED
1. Byron Bay to Ballina Walk	\$2,600,000	\$520,000	\$3,120,000	
2. Yuraygir Coastal Walk	\$2,600,000	\$520,000	\$3,120,000	
3. Solitary Islands Coastal Walk	\$100,000	\$20,000	\$120,000	
4. Five Headlands Walk	\$820,000	\$164,000	\$984,000	\$4,800,000
5. Port Macquarie to Harrington Walk	\$5,200,000	\$1,040,000	\$6,240,000	
6. Forster Great Lakes Coastal Walk	\$2,300,000	\$460,000	\$2,760,000	
8. Tomaree Coastal Walk	\$0	\$0	\$0	\$6,700,000
TOTAL For Signature Trails	\$13,620,000	\$2,724,000	\$16,344,000	

8 Trail Governance and Management

Sound trail governance is essential to the success of the development and management of the trail, and signature trails contained within it.

The entire GNCT passes through two regional tourism entities, 14 LGAs, several government departments and many First Peoples traditional lands and waters.

Finding a governance model that will provide the necessary leadership and coordinating ability to bring the partners together is critical and difficult.

A number of options exist and a brief summary of each is provided below.

8.1 Incorporated association

An incorporated association is a legal entity with a set of rules that is governed by the NSW Government's Fair Trading Department. An entity must have a minimum number of members and the obligations to the association include reporting, maintaining minutes, proper financial membership records and registers.

The advantage of this model is that it can bring together trail managers and partners to form a strategic plan and begin to drive delivery of a Master Plan or Strategic Plan for the trail or its component signature walks.

A minimum number of members is required and assuming the majority of LGAs and destinations would be willing to join (with the potential for a membership payment), then the model would potentially work.

The association would be unlikely to take on direct responsibility for trails, rather providing a fundraising, coordinating and planning role, bringing together partners under a single umbrella to advocate for the trail.

8.2 Company limited by guarantee

A company limited by guarantee has an unlimited number of members and provides for company operations in line with its constitution. The company is governed by ASIC and has greater regulatory provisions for directors and reporting requirements.

Companies can also receive deductible gift recipient status.

It is suggested that this model is a 'mature' version of governance for the trail manager, given the complexity and regulatory provisions that apply, and the need to test legal and stakeholder support.

8.3 Memorandum of understanding (MOU)

An MOU seeks to gather the partners under a simple model with a less formal structure. Partners and signatories would seek to agree on a set of priorities and advocate for funds collectively for the purpose of delivering the objectives of the MOU.

An entity needs to lead the formation of the MOU and it is suggested that the entity to do this is DNC NSW. No other organisation has the reach across the entire length of the trail.

It is also suggested that the terms of reference exclude direct management or control of the trail. This remains the responsibility of the trail manager.

This entity could eventually evolve into an incorporated association with the will of the members.

8.4 Recommended approach

While each of the options has advantages, it is recommended that in the first instance, and subject to the formal adoption of this feasibility assessment, that DNC NSW bring the trail partners together to agree on a set of principles that forms the basis of an MOU.

The partners would agree to such things as the strategic priorities for the trail, advocating for funds on a priority basis across the entire trail, delivering a strategic plan and master plan that seek to develop those signature trails that deliver the highest return on investment, and providing a consistent set of market aligned information, advertising and digital channels.

Product development must continue to be a priority, and this would also be a part of the MOU.

Once the MOU has been operating successfully for a period of time, then it may be appropriate for the MOU to progress to an incorporated association model.

DNC may seek to appoint an independent chair to ensure that the partners act in the interest of the whole trail, and not just a component.



9 Economic Impact Assessment Including Visitor Modelling

9.1 Introduction

The economic impact analysis has been undertaken by MCa <Michael Connell & Assocs> - economic consultants and revised in April 2025.

The report provides an economic impact assessment of the Great North Coast Trail (including the 7 Signature Trails) and a cost-benefit analysis. The report covers 10 years of operations for each of the signature trails. The results are indicative of the benefits to the region overall and the LGAs where the trails are located. The methodology used for the economic assessment and cost-benefit analysis is consistent with the New South Wales Government guidelines.²⁸

The economic benefits of the trails arise from spending by these trail users in the areas adjacent to the trail and are measured by the increase in regional income generated by this spending.

Visitors from outside the region (particularly overnight visitors/users) generate significant expenditure covering:

- food and beverage
- accommodation (for overnight stayers)
- recreation and other services
- transport.

The economic impacts of the development of the trail are modelled for both the construction phase and the trail operations phase once the trails are open and attracting visitors. The impacts are measured in terms of:

- full time equivalent jobs (FTE)
- the increase in regional income that is generated.²⁹

²⁸ New South Wales Government Guide to Cost -Benefit Analysis, NSW Treasury TPP17-03 , March 2017

²⁹ Regional income is the total net income generated from the activity and covers wages and salaries of employees and profits of businesses within the region. It includes income generated directly within the business and indirect income, which is generated in other regional businesses (wages and profits) from the

9.2 Construction phase economic impacts

A significant number of jobs and an increase in regional income will be generated during the construction phase of the project.

Construction impacts were modelled for each of the Signature Trails and for the total GNCT.³⁰

9.2.1 Trail construction costs

Construction costs for the GNCT development are estimated at \$31.146 million. This includes the trails and the related infrastructure. The 7 Signature Trails have a combined cost of \$16.344 million.

multiplier impacts of employee spending on the region. In the modelling of income generated, income tax and GST on spending, are both treated as leakages from the region.

³⁰ Estimates of construction costs for each trail were provided by TRC.

Table 4. Construction costs of trails

Signature Trails	Construction Cost 2023 prices
Byron - Ballina Walk	\$3,121,000
Yuraygir Coastal Walk	\$3,121,000
Solitary Islands Walk	\$120,000
Five Headlands Walk (Walking component related to the GNCT)	\$984,000
Port Macquarie Walk	\$6,240,000
Forster / Great Lakes Walk	\$2,760,000
Tomaree Coastal Walk (funded component)	\$0
Total Signature Trails	\$16,344,000
GNCT Total	\$31,146,480

Source: TRC cost estimates, August 2023.

9.2.2 Economic impacts – construction phase

The table shows the jobs generated for each of the trails. The direct jobs are mainly onsite jobs on the trails and also jobs in materials and equipment supply.

Based on the total budget for the entire GNCT of \$31.146 m, a total of 68.6 jobs would be generated (57.2 direct FTE jobs and 11.4 indirect/induced jobs). Table 5 provides the details.

Table 5. Construction phase jobs (FTE No.)

Construction Phase Jobs (Full Time Equivalent)			
Signature Trails	Direct Jobs FTE	Indirect/ Induced Jobs FTE	Total Jobs FTE
Byron Ballina Walk	5.3	1.1	6.4
Yuraygir Coastal Walk	5.3	1.1	6.4
Solitary Islands Walk	0.2	0	0.2
Five Headlands Walk	1.7	0.3	2.0
Port Macquarie Walk	10.7	2.1	12.8
Forster / Great Lakes Walk	4.7	0.9	5.7
Tomaree Coastal Walk	0	0	0
Total Jobs Signature Walks	27.9	5.6	33.5
Total Great Northern Trail	57.2	11.4	68.6

Source: MCA modelling and analysis August 2023. May be some differences due to rounding

During the construction period for the Signature Trails a total of \$7.845 m in regional income would be generated (\$6.538 m direct income and \$1.308 m indirect/induced).³¹

³¹ This assumes the construction workforce would come from the regions where the trails are located. Regional income is the total net income generated from the activity and covers wages and salaries of employees and profits of businesses within the region. It includes income generated directly within the

business and indirect income, which is generated in other regional businesses (wages and profits) from the multiplier impacts of employee spending on the region. In the modelling of income generated, income tax and GST on spending, are both treated as leakages from the region.

Table 6. Regional income – Construction phase (\$million 2023 prices)

Signature Trails	Direct Income \$m	Indirect/Induced Income \$ m	Total Regional Income \$ m
Byron Ballina Walk	\$1.248	\$0.250	\$1.498
Yuraygir Coastal Walk	\$1.258	\$0.250	\$1.498
Solitary Islands Walk	\$0.048	\$0.010	\$0.058
Five Headlands Walk	\$0.394	\$0.079	\$0.472
Port Macquarie Walk	\$2.496	\$0.499	\$2.995
Forster / Great Lakes Walk	\$1.104	\$0.221	\$1.325
Tomaree Coastal Walk	\$0.000	\$0.000	\$0.000
Total Signature Walks	\$6.538	\$1.308	\$7.845
Total GNCT	\$13.385	\$2.677	\$16.062

Source: MCA Modelling & analysis August 2023 (Revised April 2025). May be some differences due to rounding.

9.3 Trail operations Phase – visitors and trail users

9.3.1 Analysing trail impacts

The operations phase economic impacts of the trail are driven by the expenditure of trails users in the regions LGAs that trails are located.

MCA's regional economic model is used to estimate the employment and income impacts of the proposed trail. The model allocates spending across relevant industry sectors and takes account of the significant shares of the gross spending by visitors/users, which leaks out of the region.³²

³² The spending by trail users is not the economic impact and does not represent the increase in regional income. There is a major leakage of this spending out of the region due to: the GST (10%); and a significant component of the value of services and products purchased by visitors comes from outside the region

Several types of analysis were undertaken:

- Estimates of trail users for each of the Signature Trails over a 10 year period of operations. These comprise:
 - local residents of the LGA where the trail is located
 - day visitors who walk a segment of the trail
 - overnight visitors who walk segments of the trail, and
 - overnight visitors who walk the entire Signature Trail. Overnight visitors include domestic visitors (intrastate & interstate) and Internationals.
- Estimates were made of the spending in the region (LGA) by trail users.
- LGA population data is from ABS Census 21, and visitor and average spending data is the Tourism Research Australia (TRA) Local Government Profiles 2019 (i.e., pre-covid.).
- Growth from year 4 onwards is based on an annual growth rate of 2% per year for all categories of trail users.
- For length of stay of overnight trail users we added one night to the TRA average data for the relevant LGA allowing for travel to and or from the trail (i.e., a night before or after the walk)
- Details of all modelling assumptions and data sources are in the Appendices.

(e.g. food ingredients, soft drinks, beer, consumer products bought etc.). The model takes account of these leakages and estimates employment impacts and the increase in regional income that accrue to the region where the trail is located.

9.3.2 Signature trail users

The following chart shows estimates of total trail users for the 7 Signature Trails. These represent an increase over current general visitor levels in the LGAs where the trails are located. Total users increase from around 209,260 in year 1 to around 240,370 in year 10.

Local residents walking on segments of a trail account for around one third of users. Overnight visitors account for around 45% of trail users.

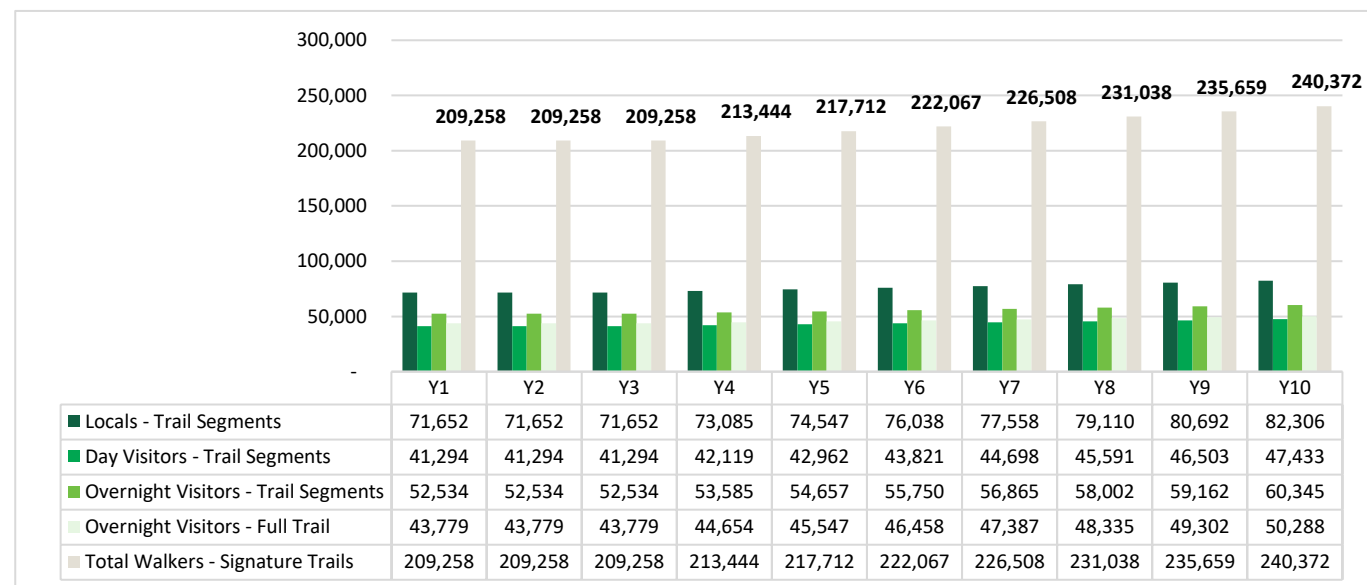
Full details of trail user estimates for each Signature Trail (and type of user) are in the Appendices of this report.

The following table and chart provide the total user number estimates for the proposed Signature Trails.

Table 7. Trail user estimates – total signature trails (number)

Trail Users	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10
Locals - Trail Segments	71,652	71,652	71,652	73,085	74,547	76,038	77,558	79,110	80,692	82,306
Day Visitors - Trail Segments	41,294	41,294	41,294	42,119	42,962	43,821	44,698	45,591	46,503	47,433
Overnight Visitors - Trail Segments	52,534	52,534	52,534	53,585	54,657	55,750	56,865	58,002	59,162	60,345
Overnight Visitors - Full Signature Trail	43,779	43,779	43,779	4,654	45,547	46,458	47,387	48,335	49,302	50,288
Total Signature Trails	209,258	209,258	209,258	213,444	217,712	222,067	226,508	231,038	235,659	240,372

Source: MCA Modelling & analysis August 2023.

Figure 16. Total signature trail users by type (number)

Source: MCA Modelling & analysis August 2023

The following table provides the modelled visitor numbers per proposed Signature Trail.

Table 8. Modelled trail users (Total) by proposed signature trail

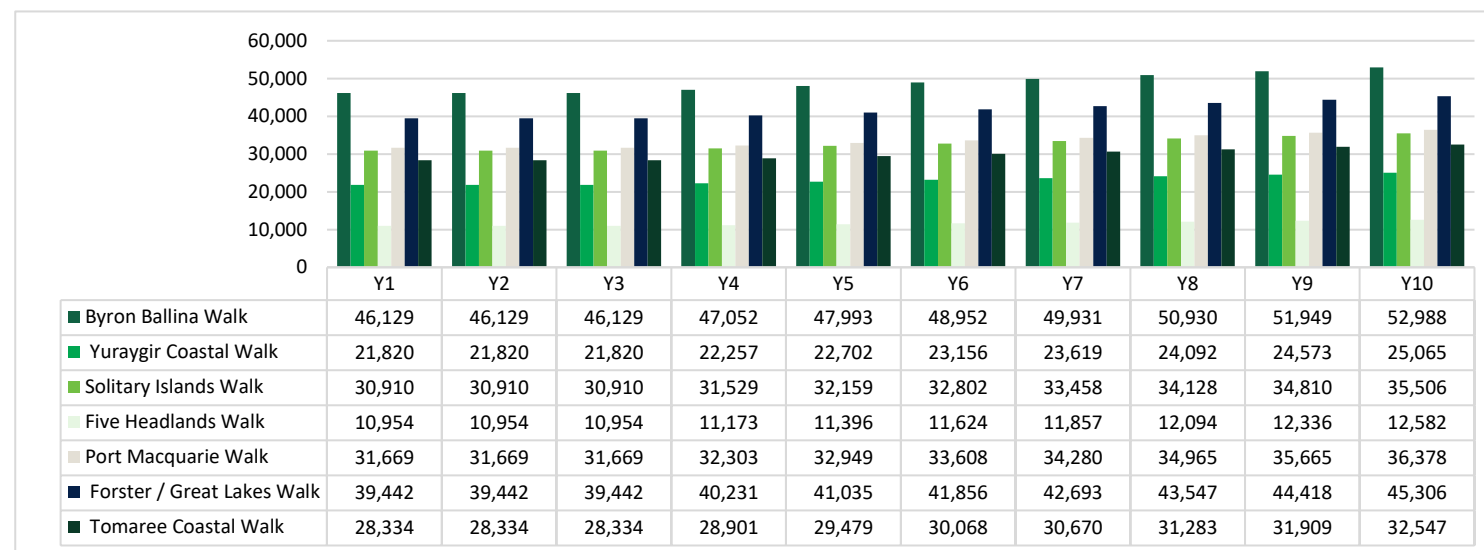
Trail Users	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10
Byron Ballina Walk	46,129	46,129	46,129	47,052	47,993	48,952	49,931	50,930	51,949	52,988
Yuraygir Coastal Walk	21,820	21,820	21,820	22,257	22,702	23,156	23,619	24,092	24,573	25,065
Solitary Islands Walk	30,910	30,910	30,910	31,529	32,159	32,802	33,458	34,128	34,810	35,506
Five Headlands Walk	10,954	10,954	10,954	11,173	11,396	11,624	11,857	12,094	12,336	12,582
Port Macquarie Walk	31,669	31,669	31,669	32,303	32,949	33,608	34,280	34,965	35,665	36,378
Forster / Great Lakes Walk	39,442	39,442	39,442	40,231	41,035	41,856	42,693	43,547	44,418	45,306
Tomaree Coastal Walk	28,334	28,334	28,334	28,901	29,479	30,068	30,670	31,283	31,909	32,547
Total Signature Trails	209,258	209,258	209,258	213,444	217,712	222,067	226,508	231,038	235,659	240,372

Source: MCA Modelling & analysis August 2023

The following chart shows total trail users for each of the Signature Trails. The trails expected to attract the highest numbers of users are:

- Byron Bay to Ballina (Y1 46,130 and Y10 52,988)
- Forster to Great Lakes (Y1 39,444 and Y10 46,306).

Figure 17. Total trail users by proposed signature trail



Source: MCa Modelling & analysis August 2023

9.3.3 Spending by trail users

This section provides estimates of spending by trail users over the 10-year period. Average spending per person is in constant \$2023 prices and is based on TRA data for each LGA where a trail is located.

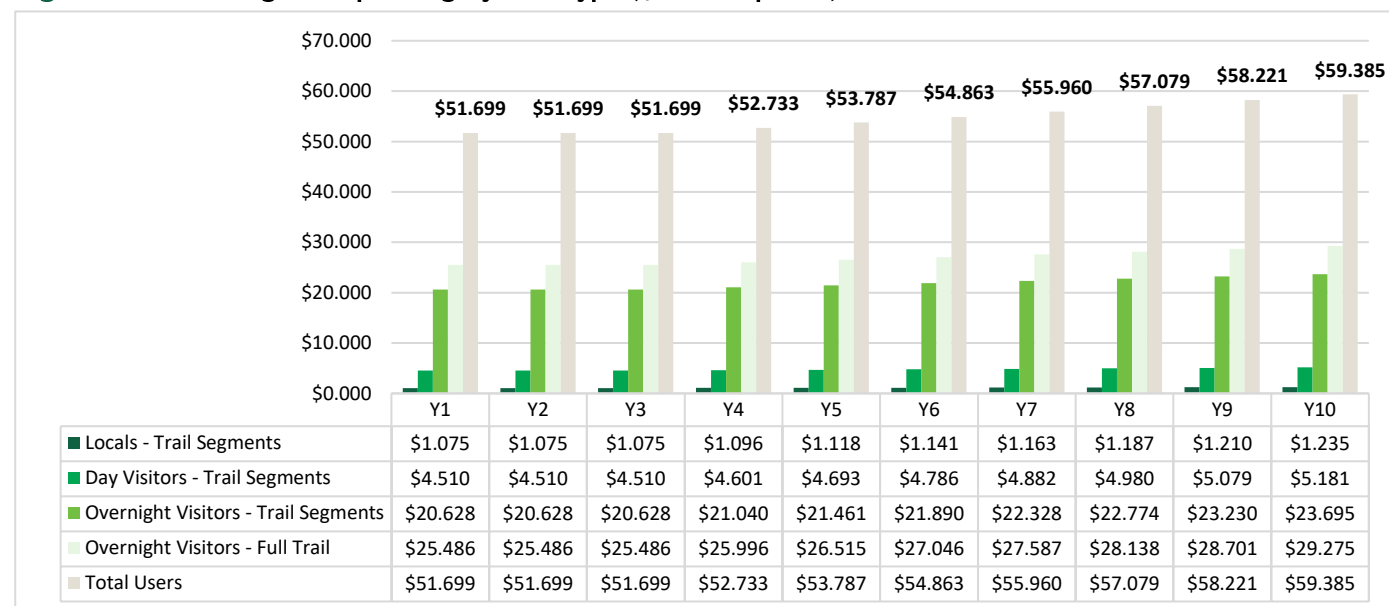
SPENDING ESTIMATES

This covers the estimated spending for all trail users over a 10-year period of trail operations. The chart below shows total spending for the 7 proposed Signature Trails.

- Total spending of all trail users increases from \$51.699 m in year 1 to \$59.385 m in year 10. Overnight visitors using the trails account for around 88 % of the estimated total spending

- The spending estimates are based on spending occurring in areas adjacent to the trails in the LGAs that have the proposed Signature Trails. This spending would cover food and supplies and some off trail accommodation for overnight visitors. It also includes spending on recreational and transport services (e.g. shuttle transfers)
- Locals who use segments of the trails, represent about one third of users but spend very little.

Figure 18. Total regional spending by user Type (\$m 2023 prices)



Source: MCA Modelling & analysis August 2023.

The following chart shows spending in regions by users of the proposed Signature Trails. It varies between different trails based on projected user numbers and average spending levels.³³ They are higher for several trails – Byron/Ballina; Forster/Great Lakes and Solitary Islands.

³³ Average daily spending per person varies between the LGAs where the trails are located. (See Appendix A)

Table 9. Trail users spending by user type – proposed signature trails

Trail Users	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10
Locals - Trail Segments	\$1.075	\$1.075	\$1.075	\$1.096	\$1.118	\$1.141	\$1.163	\$1.187	\$1.210	\$1.235
Day Visitors - Trail Segments	\$4.510	\$4.510	\$4.510	\$4.601	\$4.693	\$4.786	\$4.882	\$4.980	\$5.079	\$5.181
Overnight Visitors - Trail Segments	\$20.628	\$20.628	\$20.628	\$21.040	\$21.461	\$21.890	\$22.328	\$22.774	\$23.230	\$23.695
Overnight Visitors - Full Signature Trail	\$25.486	\$25.486	\$25.486	\$25.996	\$26.515	\$27.046	\$27.587	\$28.138	\$28.701	\$29.275
Total Signature Trails	\$51.699	\$51.699	\$51.699	\$52.733	\$53.787	\$54.863	\$55.960	\$57.079	\$58.221	\$59.385

Source: MCA Modelling & analysis August 2023

Figure 19. Proposed signature trails – spending in region by users (\$2023 prices)

Source: MCA Modelling & analysis August 2023

WALKING THE GREAT NORTH COAST TRAIL

A very small number of persons would walk the entire trail as one element, which would take around 40 days to complete. We have projected walkers at between 250 to 350 over 10 years (with average spending of \$100 per day. Total spending ranges from \$1.0 million per year to \$1.4 million.

The table below shows the spending per person for walkers undertaking the entire trail.

Table 10. Spending by persons undertaking the full trail

GNCT (Spending \$2023 prices)	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10
Full Trail - Walkers	250	250	300	300	300	300	350	350	350	350
Days on Trail (40)	10,000	10,000	12,000	12,000	12,000	12,000	14,000	14,000	14,000	14,000
Total Spending (@ \$100 per day) \$million	\$1.000	\$1.000	\$1.200	\$1.200	\$1.200	\$1.200	\$1.400	\$1.400	\$1.400	\$1.400
Spend per person	\$4,000	\$4,000	\$4,000	\$4,000	\$4,000	\$4,000	\$4,000	\$4,000	\$4,000	\$4000

Source: MCA Modelling & analysis August 2023

9.4 Economic impacts – trail operations

9.4.1 Employment impacts – jobs generated

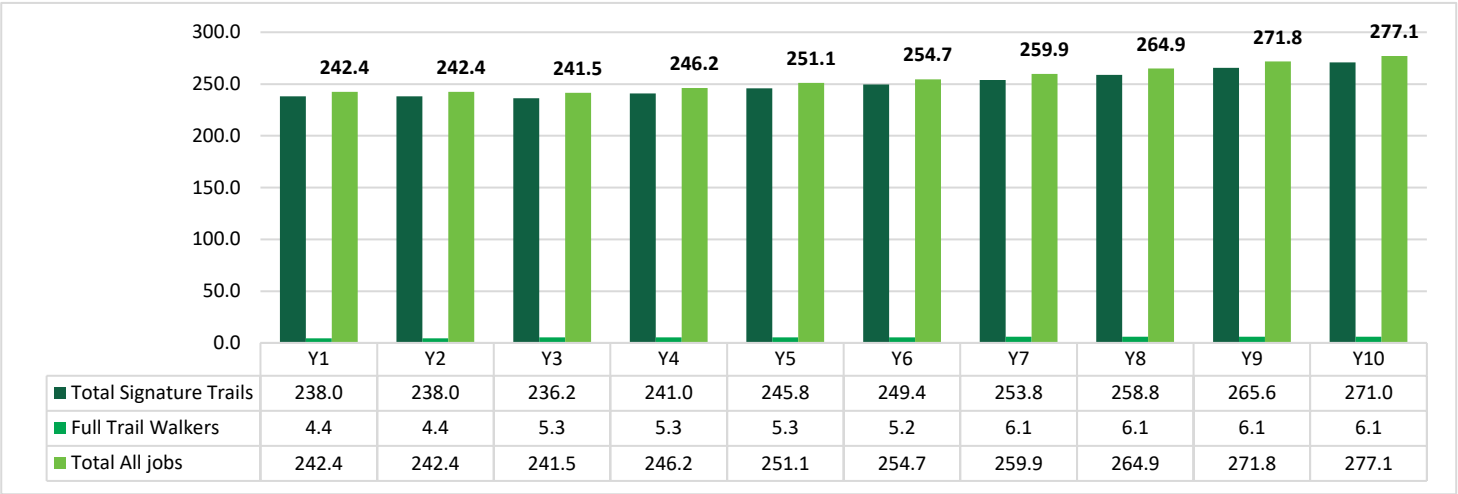
Trail visitors/users and their spending support and generate jobs across several sectors in each LGA associated with a Signature Trail.

- Users of the trails were estimated to support and generate a total of around 238 FTE jobs in year 1 increasing to around 285 jobs in year 10
- These jobs comprise direct jobs in visitor linked services and indirect/induced jobs in the region
- The small number of persons walking the entire North Coast Trail generate 4.4 FTE jobs in Year 1 and 6.1 FTE jobs in Year 10.

The jobs generated are mainly in recreation services (e.g. support – shuttles, guides, etc. and other activities), accommodation, food service, transport, and retail.

The following chart shows the fulltime jobs created by trails.

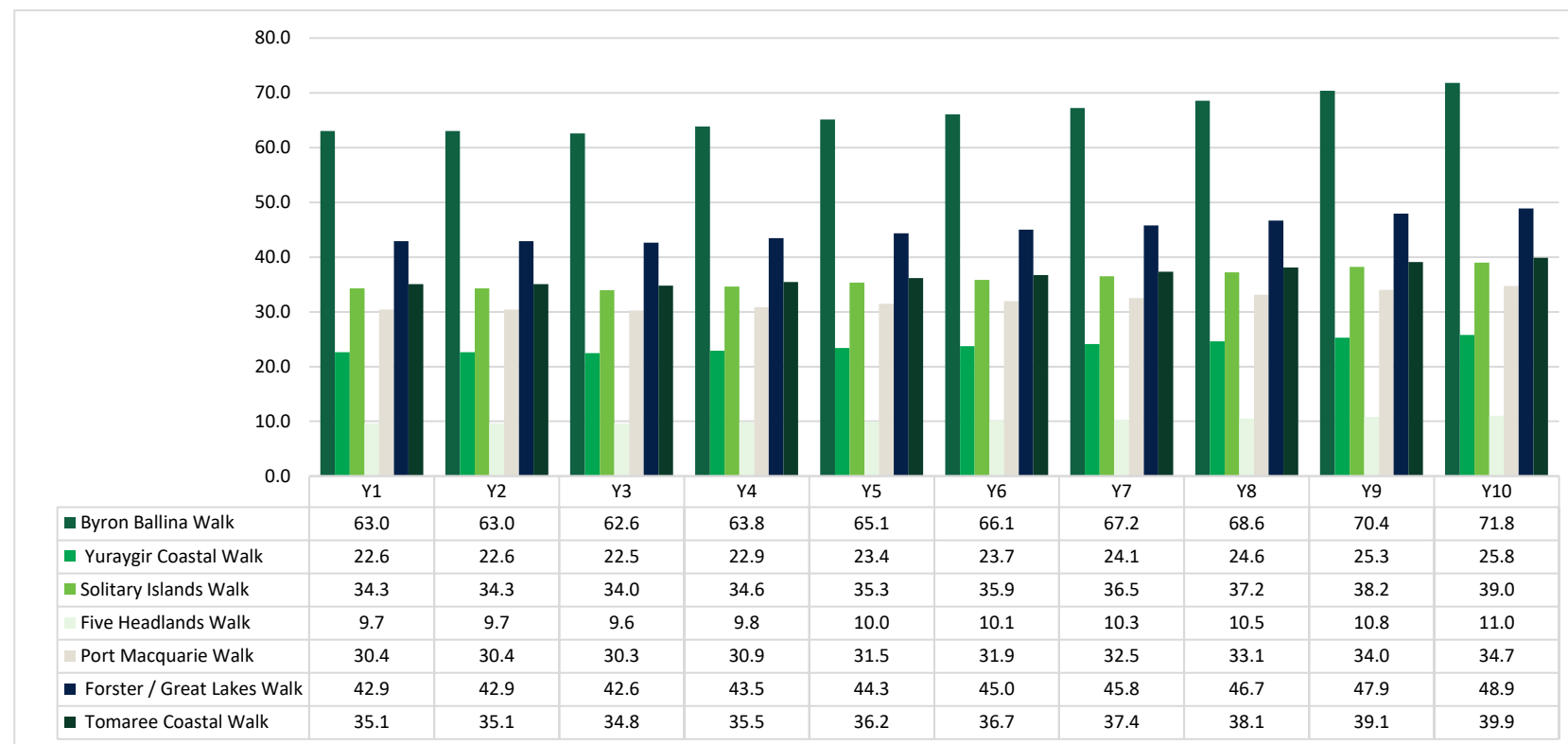
Figure 20. Total regional jobs generated by trails (FTE No.)



Source: MCA Modelling & analysis August 2023.

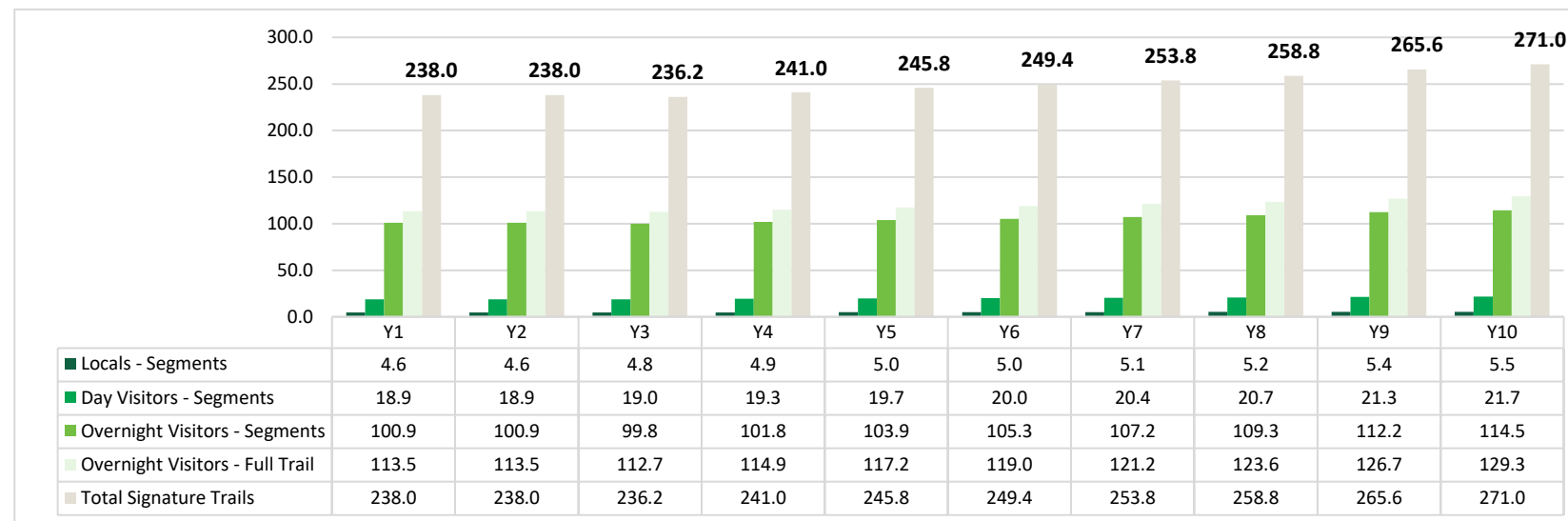
The chart below shows the jobs generated by each trail. Those trails generating the most jobs are:

- Byron/Ballina (Y1 63, Y10 72)
- Forster/Great Lakes (Y1 43, Y10 49)
- Tomaree Coastal Walk (Y1 35, Y10 40).

Figure 21. Signature trails – regional jobs generated (FTE No.)

Source: MCA Modelling & analysis August 2023

The chart below shows the number of jobs generated on the Signature Trails by type of users. Overnight visitors using the trails generate over 90% of the jobs due to their higher daily spending levels and their length of stay. Locals and day visitors using segments of the trails generate a lot fewer jobs.

Figure 22. Total signature trails – regional jobs generated by user type (FTE No.)

Source: MCA Modelling & analysis August 2023

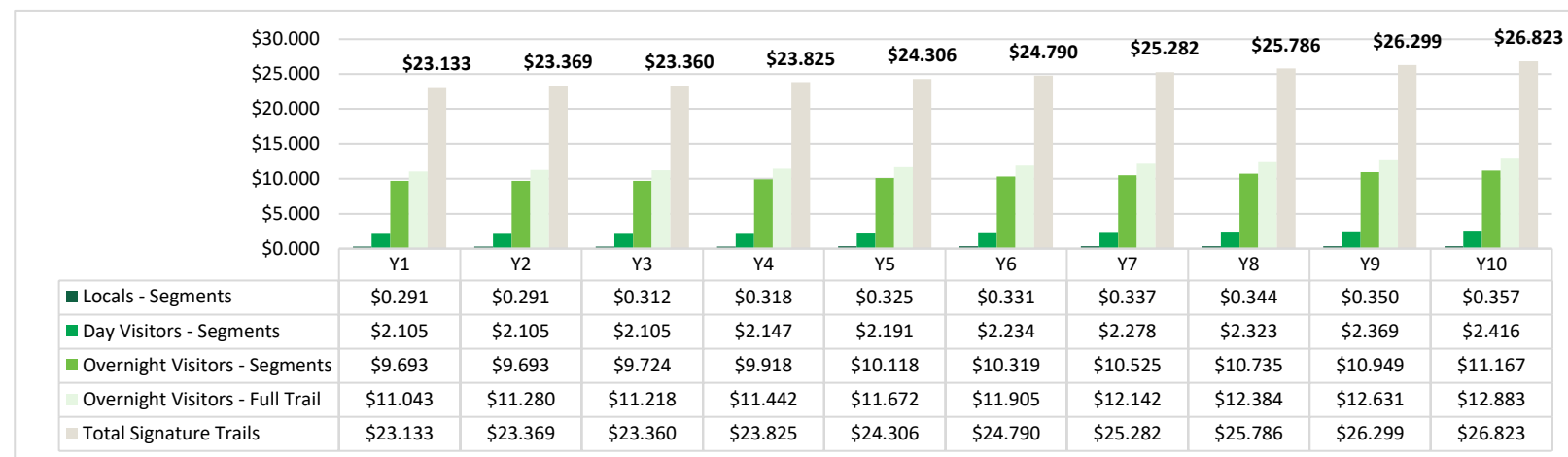
9.4.2 Regional income impacts

Trail users and their spending provides a major boost to regional income (wages & salaries and business profits).

- All users of the Signature Trails generate total additional regional income \$23.133 million in year 1 increasing to \$26.823 million in year 10. Regional income comprises direct income and indirect/induced income.³⁴
- Total regional income generated over 10 years of Signature Trails operations is \$246.973 million (in constant 2023 prices).

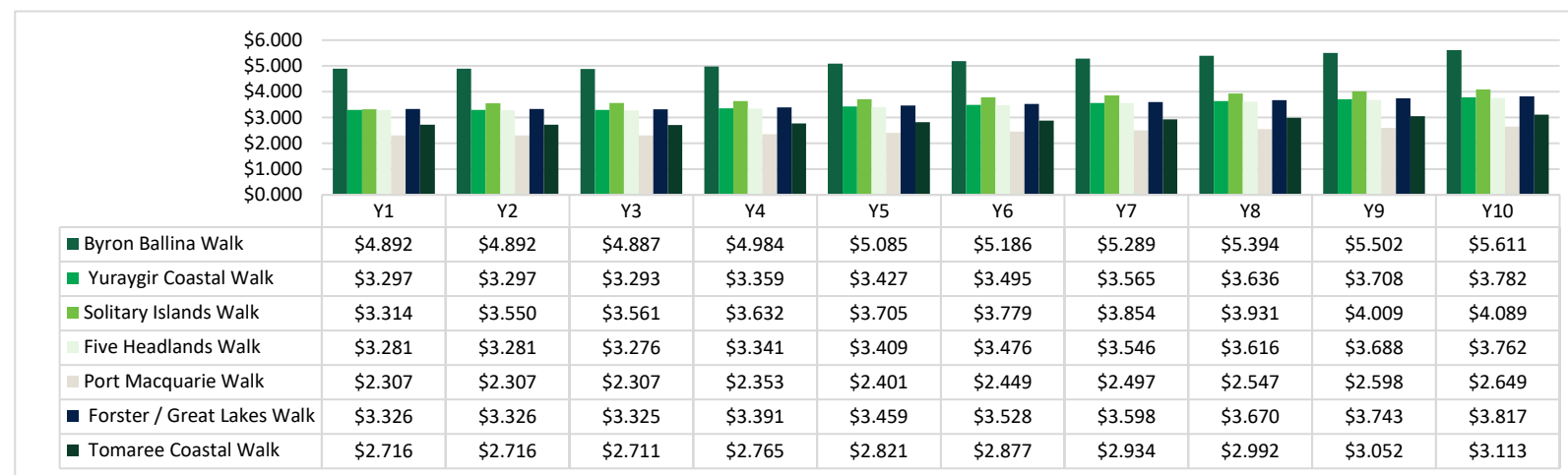
The Chart below shows the total regional income generated by the proposed Signature Trails (\$m 2023 prices).

³⁴ Regional income is the total net income generated from the activity and covers wages and salaries of employees and profits of businesses within the region. It includes income generated directly within the business and indirect income, which is generated in other regional businesses (wages and profits) from the multiplier impacts of employee spending on the region. In the modelling of income generated, income tax and GST on spending, are both treated as leakages from the region.

Figure 23. Total regional income generated by proposed signature trails (\$m 2023 prices)

Source: MCA Modelling & analysis August 2023.

The following chart shows the regional income generated by the proposed Signature Trails by Trail (\$m 2023 prices)

Figure 24. Signature trails - regional income generated (\$m 2023 prices)

Source: MCA Modelling & analysis August 2023

9.5 Benefit cost analysis

The benefits and costs are analysed for a 10-year period for the trails development and operations. The measured benefits are those associated with the growth in user numbers and their spending over the 10 year period.

9.5.1 Trail costs – 10 years

The total estimated construction cost for the GNCT and the associated infrastructure is \$31.146 million.³⁵ The 10-year maintenance costs are \$7.787 million (assumed to be 2.5% of capital cost per year over 10 years), for a total 10-year project cost of \$38.933 million.

9.5.2 Measuring benefits – trail users

The measured benefits (10 years) for the trails were estimated. Regional income is the increase in regional income generated by the spending in the region by users of the Signature Trails over the 10 year period is \$251.183 million.

9.5.3 Benefit cost analysis

The following table and chart compares the costs of the trails development with the benefits associated with trails usage over the 10-year period.

- The benefits are measured by the increase in regional income generated by trail users over a 10-year period
- The costs include construction costs, and asset maintenance costs
- For the comparison, the present value of the benefits is calculated using 3 discount rates (3%, 7% and 10%). The capital costs cover the trail improvements and new trails.³⁶

The following table shows the benefit and cost analysis.

Table 11. Benefit and cost analysis – GNCT – 10 year period (\$2023 prices)

Trails Project	Discount Rate	Discount Rate	Discount Rate
Regional Cost Benefit (\$2023 prices)	3%	7%	10%
Period : 10 Years			
Project Costs			
Capital Costs Trail & Infrastructure	\$31,146,480	\$31,146,480	\$31,146,480
Costs - Asset Maintenance (10 years)	\$7,786,620	\$7,786,620	\$7,786,620
Total Costs	\$38,933,100	\$38,933,100	\$38,933,100
Benefits - Total			
Direct Benefits Regional Income	\$ 251,182,596	\$ 251,182,596	\$ 251,182,596
Total Benefits	\$251,182,596	\$251,182,596	\$251,182,596
Total Benefits (\$) Present Value	\$210,460,761	\$173,324,866	\$151,851,134
Benefit Cost			
Net Present Value (\$) Total Benefits	\$171,527,661	\$134,391,766	\$112,918,034
NPV/Cost	4.4	3.5	2.9
Benefit Cost Ratio (BCR) <Total Benefits: Present Value/Total Capital Costs>	5.4	4.5	3.9

Source: MCa Modelling & analysis August 2023.

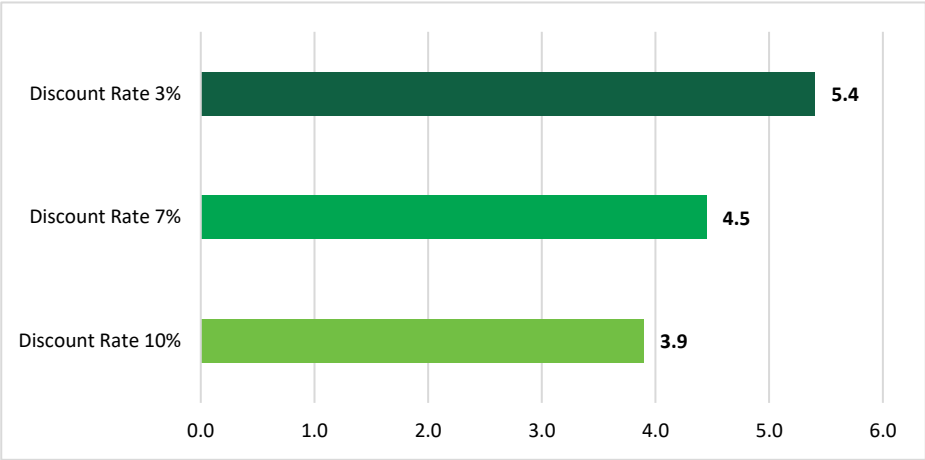
The chart below compares Benefit Cost Ratios (BCR) for the 3 discount rates. The BCR for a 3% discount rate is 5.24 for a 7% discount rate 4.5 and for a 10% discount rate 3.9. Using the 7% discount rate, the project returns a strong BCR. Every dollar of spending on the trail over 10 years delivers \$4.50 in benefit.

³⁵ TRC cost estimates August 2023 revised April 2025

³⁶ These discount rates are those required by the NSW Treasury Guidelines for cost benefit analysis.

The following figure provides the BCR graphically.

Figure 25. GNCT development – benefit cost ratio (BCR)



Source: MCa Modelling & analysis August 2023 revised April 2025.

10 Project Risks

RISK	RATING	RESPONSE / TREATMENT PROPOSED
Only part funding is received	High	<ul style="list-style-type: none"> Develop the trail with the highest priority components first. This would have a focus on the Signature Trails. This would include developing marketing and branding in addition to on ground works to create the sense of excitement and to build visitation Further funding is applied for in later years of the proposed trail's development Partial implementation could also see partnering with local government and National Parks Services on areas that have strong trail services currently Trail and experience quality is vital to achieving the vision, in limited budgets, trail quality and environmental performance is more important than trail length as a general principle.
Fire or emergency	Medium	<ul style="list-style-type: none"> Much of the trails sit in an environment where fire and flooding can occur. Careful thought to emergency management is important from a visitor safety perspective Trail construction should be done using sustainable methods and use materials that are more durable including steel, stone and gravel Trails should where possible be raised to avoid flooding in creek lines and valleys. Where this is not possible, the surface should be constructed from materials easily replaceable Regular planning across the emergency services and trail managers can reduce the likelihood of consequences.
Approval for one or more sections is not forthcoming	High	<ul style="list-style-type: none"> Coastal environments have high conservation requirements and are subject to a range of environmental overlays. Detailed planning for new trail sections may rule out construction of the trail. Alternative routes that still provide the intent of the trail should be considered in less significant areas One of the next phases of this plan would be further planning to define some of those routes and specify in engineering terms the trail type etc. The principles of avoidance should be implemented where any conservation or cultural heritage implications exist Detailed assessment of routes will require First Peoples assessment to ensure that no cultural areas of significance are impacted.
The trail concept is put in place, but visitor numbers are significantly below those forecast	Moderate	<ul style="list-style-type: none"> The business case development shows that the implementation of the proposed trail and Signature Trails provides a net positive benefit. The eventual proponent and land managers will need to collaborate ensure the experiences are planned well and the trails marketed. Events and tour operators may need to play a greater role

RISK	RATING	RESPONSE / TREATMENT PROPOSED
		<ul style="list-style-type: none"> Other elements including village presentation and village layout/feel also play a role in promoting the attributes of a walking holiday and need careful thought/improvement Collaboration with a range of trail partners will increase the likelihood of success.
Trail maintenance is not sufficient or effective and the trail experience deteriorates	Moderate	<ul style="list-style-type: none"> Trail maintenance is a critical component of the experience remaining high quality and attracting people to walk the destination Trail managers will need to take a broader economic benefit into account when considering maintenance expenses Professional design and construction through implementing this trail may limit the annual maintenance costs due to the higher quality trail surface.
Business across the North Coast area do not respond to the opportunity	Low to Moderate	<ul style="list-style-type: none"> Services such as bike hire, shuttles/transport and walker-friendly accommodation will be important to the success of this feasibility. Business opportunities and response are critical to the provision of services. Partnering with the Chambers of Commerce and Local Governments are critical to helping businesses understand the role and opportunity
Competitor pressure	Low	<ul style="list-style-type: none"> This development fits strategically within Destination Management Plan for the North Coast and also at a State level for NSW Other coastal walking destinations that compete with the GNCT are likely to be outside NSW and even Australia.

Appendix A – Strategic Alignment

THRIVE 2030 - Australia's National Strategy

The National Strategy for recovery and return of long-term sustainable growth of the nation's visitor economy has a target of achieving 230 billion by 2030 of which \$100 billion is regional spend. The strategy is underpinned by three themes; collaborate, modernise and diversify. If built and successfully promoted, the GNCT project strongly aligns with THRIVE 2030 by supporting policy priorities to enhance visitor infrastructure and to build markets and attract visitors with key importance that the infrastructure meets the needs of visitors and local communities.

NSW Visitor Economy Strategy 2030

The NSW Government's vision is to be the premier visitor economy in the Asia Pacific contributing \$65 billion in total visitor expenditure by 2030. Regional NSW is key to the future contributing \$25 billion to the total.

The strategy has 5 strategic pillars with pillar 3 – Showcase our Strengths— *stunning beaches and coastal communities that include a reconnect in nature through iconic walks* and 5 – Facilitate Growth -*contributing to grow and expand the visitor economy* that the GNCT concept meets.

GNCT will contribute to a growth in visitation and expenditure for the North Coast Region and facilitate this growth by improving access to visitor destinations and attractions through bold new infrastructure like GNCT.

This will deliver economic prosperity whilst creating new jobs and simultaneously providing community benefit and lifestyle improvements.

NSW Government Statewide Destination Management Plan (DMP)

The Statewide DMP is designed to provide a high-level framework to achieve alignment across NSW and assist coordinated delivery of the vision and goals for the NSW visitor economy. North Coast NSW is identified as one of the current 'hero' destinations in NSW. With South West Rocks, Bellingen, The Tweed and Yamba considered to become further hero destinations, the future of the GNCT concept has sound strategic backing.

10 areas of strategic focus have been identified to help grow the value of the NSW visitor economy. Strategic Focus 3 is to Develop and deliver statewide experiences and products strategies in partnership with the Destination Networks. This will be achieved through product and industry development, better bundling of new and existing assets, the development of touring routes and trails and increasing the number of 'export ready' experiences. The GNCT project meets these objectives and if developed will contribute strongly to the NSW North Coast as a nature-based hero destination.

In addition, experiences which have been identified for focus in the future across NSW include aquatic and coastal, nature and adventure, special interest activities, health and wellbeing, journeys, and touring routes of which GNCT sits well within nature and adventure.

North Coast NSW Destination Management Plan

The North Coast NSW destination management planning process identified nature-based and adventure travel and local food as strong experience themes for the region.

Set apart from other destinations by the connection between coast and hinterland, North Coast NSW can further enhance and develop innovative nature-based products and attractions – especially on water.

Strategic Objectives of the North Coast DMP to meet the state objective Showcase our Strengths include:

- Build authentic experiences around the region's product strength
- Support growth of wellness, food & beverage, aboriginal product
- Improve quality of commercial accommodation
- Facilitate growth of paid nature-based experiences
- Focus on increasing average length of stay and yield.

Strategically coordinated development of experiences that aim to grow visitor economies and attract higher yielding, appropriate, and respectful visitor markets is a priority that the GNCT concept supports.

The plan also defines the Local Government Area (LGA) Positioning of all LGA's in the North Coast. Each area highlights their key experiences to include walks, nature, world famous coastlines and beaches, pristine coastline, existing trail networks and in each of the LGA's.

Specific Action alignment to GNCT concept

3.2 - Work with the Destination Network Project Management Group, NPWS and FCNSW and private landowners to identify opportunities for hero nature-based product and experience development that is the responsibility of DNPMG DNSW NPWS, FCNSW LGAs, LTOs 2022 to 2030.

North Coast Regional Economic Development Strategies (REDS) 2018-22

The REDS set out a vision to support the economic development of each region. They identify the regions key strengths, its engine and emerging industries and identifies priority strategies and actions to support the region's economic development.

All the relevant North Coast REDS identify that nature-based tourism is a key asset and driver of visitation to the region.

The project will also help mitigate low season periods and offer diverse experiences which were strategies highlighted in the Clarence Valley, Coffs Coast, Mid Coast and Northern Rivers REDS.

Providing indigenous business and employment opportunities in the tourism sector is also identified as key strategies in the Tweed, Nambucca and Northern Rivers REDS which align with the objectives of the proposed development of the GNCT.

North Coast Regional Plan 2041

The North Coast Regional Plan 2041 sets a 20-year strategic land use planning framework for the region, aiming to protect and enhance the region's assets and plan for a sustainable future. Since the last plan was released in 2017 the region has seen prolonged drought, flooding, bushfire and the effects of COVID-19 pandemic.

It is designed to guide planning and provide a framework for decision-making by the NSW Government and councils and to inform decisions by the private sector and the wider community.

The plan is underpinned by 3 broad goals and 20 objectives.

Under the 'Productive and Connected' goal, Objective 12 is to create a diverse visitor economy with a focus on developing medium to smaller scale nature based and coastal tourism accommodation outside prime tourism areas that aligns well with the GNCT concept.

Council strategic planning and local plans should consider opportunities to create green and open spaces that are accessible and well connected and enhance existing green infrastructure in tourist and recreation facilities and identify appropriate areas for tourist accommodation and tourism development that support the trail business case.

Land management plans

National Parks and Conservation Areas of the Great North Coast are home to some of the best beaches in Australia. There are 91 national parks within North Coast NSW that boast spectacular walking tracks, top spots for whale watching, snorkelling, and fishing - and World Heritage Gondwana rainforests.

NSW NPWS has committed to more than \$450 million of visitor infrastructure improvements across the state enhancing visitor experiences under the National Parks Visitor Infrastructure Program.

The infrastructure projects delivered under this program significantly enhances visitor facilities and creates new iconic experiences in NSW national parks including new walking trails, accommodation, and tourism partnerships and aims to enhance nature-based visitor experiences across New South Wales.

The \$450 million investment under the **National Parks Visitor Infrastructure Program** represents the largest investment in visitor infrastructure in national parks history.

For the GNCT there are several new walks and visitor experiences being developed on the NSW North Coast that would add value to GNCT and could be promoted as part of the experience.

These include:

Tomaree Coastal Walk – A spectacular 20-kilometre coastal walk in Tomaree National Park, Port Stephens

Part of the Worimi Aboriginal cultural landscape, the area is steeped in history with ancient volcanic peaks delivering world-class views and the rich WWII heritage of Tomaree Head.

The Tomaree Coastal Walk project will provide a first-class nature-based tourism attraction for Port Stephens, promote the spectacular natural and cultural heritage of Tomaree National Park and build a valued legacy for future generations.

The walk will promote the rich culture and heritage of the area, encourage sustainable development and provide broad physical and mental health benefits through access to recreation facilities and the natural environment.

Once completed the Tomaree Coastal Walk is expected to significantly contribute to the local and regional economy, creating jobs in tourism and hospitality sectors through increased visitation that will in turn generate expenditure from intrastate, interstate and overseas visitors.

These will become product strengths that can potentially be promoted as part of the GNCT.

Tweed Byron Hinterland Trails – New ways to explore nature in the north.

This project will boost the local economy by extending visitor stays and providing greater opportunities for visitors to explore the Northern Rivers region outside tourist hotspots such as Byron Bay.

The project includes a new multi-day walk from Mount Jerusalem National Park to Nightcap National Park. This signature 4-day walk will be purpose-built to provide walkers with an immersive rainforest experience through the remnant caldera of an ancient shield volcano, concluding at the spectacular Minyon Falls lookout.

NPWS are consulting with Aboriginal communities and developing partnerships to highlight the area's rich cultural heritage, including opportunities for Aboriginal-guided experiences.

Dorrigo Escarpment Great Walk – A new 46-kilometre multi-day walk with 4 purpose built communal low impacts walkers' huts and camping areas and visitor centre are proposed for Dorrig National Park.

The centrepiece of proposed upgrades to Dorrig National Park is the new Arc Rainforest Centre that will feature a spectacular boardwalk and lookout.

MacLeay Coast Destination

This project will improve the range and quality of experiences on offer in Arakoon National Park and develop visitor facilities that complement the existing historic and cultural significance of the area.

Appendix B – Australian Walks and their Features

TRAIL	LOCATION	ROUTE/TRACK	EXPERIENCE	ACCOMMODATION	SERVICES	INTERPRETATION
Great Ocean Walk*	Along the coastline between Apollo Bay and the Twelve Apostles (near Port Campbell) in south west Victoria. Traverses Great Otway National Park. Three-hour drive east of Melbourne.	100km trail able to be walked as an 8 day walk or as shorter multi-day walks or day walks. Mostly easy to moderate grade with some harder sections. Walked in an east-west direction. Mix of purpose-built track, rock platforms, sandy beaches and some shared vehicle trails.	Independent or guided walking. Iconic Southern Ocean coastline with tall forest, scenic cliff-top vistas, deserted beaches and rock platforms. Parallels the Great Ocean Road from which it is accessible at several nodes. Low to moderate level of interaction with other visitors at access nodes. . Some higher volume interaction at major visitor nodes (such as The Twelve Apostles) at peak visitor periods.	Seven bookable, limited capacity, Parks Victoria on-trail campsites, 4 of which can accommodate small parties of up to 18 walkers. Numerous options with off-trail accommodation partners.	Comprehensive online walk information and booking facility. Links to partners. Numerous options for transport shuttles, guided walks and self-guided walks of various lengths and difficulty aimed at a range of markets. Some showcase local natural and cultural features, local food and produce. Equipment hire services.	Free downloadable audio apps in English, German, Japanese and Korean. Onsite interpretation at visitor nodes along the walk. Offered by licensed tour operators, some of which feature local guides. A variety of products focus on different aspects – such as natural, historic, Aboriginal, shipwrecks, local food and produce.
Three Capes Track*	Tasman Peninsula, Tasmania about a 90-minute drive from Hobart. Commences at the Port Arthur Historic Site and traverses part of the Tasman National Park to Fortescue Bay.	46km trail. Total walk takes 4 days/3 nights. Easy to moderate grade with some steeper sections on purpose-built, highly engineered track. Plan to add a further track to Cape Raoul. (Other bushwalkers can access the track and an older track and park service campsites from	Spectacular sea cliffs wild forest and heath landscapes. Chance to see marine wildlife. Walk starts at Port Arthur with a boat trip to the trailhead. Independent walkers limited to 48 per day, staying one night in each of 3 on-track public cabins located away from visitor nodes. Cost per adult is \$495 and per child/concession \$396. One tour operator is licenced to provide an exclusive trail experience.	3 bookable, purpose-built, self-catering public cabins with beds and shared cooking and dining facilities managed by Host Rangers. Exclusive, fully catered, private on-track lodges operated by single tour operator.	Comprehensive online walk information and booking facility. Links to partners. Shuttle bus service between Fortescue Bay and Port Arthur at the end of the walk. Scheduled bus services from and to Hobart. Also charter bus and taxi services. Equipment hire and food purchasing services.	On-track interpretation at 'story-seats'. Complimentary track guidebook provided to walkers. Interpretation and reference books at cabins. Interpretation provided by private operator. Interpretation at Port Arthur Historic Site.

TRAIL	LOCATION	ROUTE/TRACK	EXPERIENCE	ACCOMMODATION	SERVICES	INTERPRETATION
		Fortesque Bay but cannot stay/camp at Three Capes Track huts).			Luggage storage at Port Arthur.	
Wilderness Coast Walk	Along the coast between Mallacoota and Sydenham Inlet in Croajingalong National Park in east Gippsland, Victoria. About 6 hours' drive from Melbourne to Mallacoota.	About 100km of mainly beach walking with some coastal forest and heathland areas. No track makers in some areas. May be walked in its entirety or as shorter day or overnight walks.	Remote wilderness hiking along an isolated coastline and through pristine environments rich in coastal wildlife for fully equipped, self-sufficient walkers. Permits required. Maximum group size of 8 people. Accessible from several locations.	Designated wilderness campsites which must be booked in advance. Limited to a 2-night stay at each campsite. General campsites near access points. Point Hicks Lighthouse Keepers' Cottages bookable through Parks Victoria. Holiday accommodation at beginning and end of walk at Mallacoota and Bemm River.	Basic online information on route, logistics and safety. Online campsite booking. Various guided tours cover parts of the route.	No interpretation in wilderness parts of the journey – up to walkers to obtain information. Information on cultural and heritage values available online. Interpretation offered by tour operators.
Cape to Cape Track	Between Cape Naturaliste Lighthouse and Cape Leeuwin Lighthouse in the far south-west of Western Australia. Passes through several small coastal towns and close to the visitor destination and wine growing area of Margaret River. About 3 hours' drive south of Perth.	About 135 km taking between 5 and 8 days to walk. May be walked in short day or multi-day sections. Variable route conditions including beaches and inland areas mainly of an easy to moderate grade. Numerous access points.	Extensive beaches, spectacular coastal cliffs, diverse vegetation, wildflowers and wildlife, limestone caves. Experience of small coastal towns and local history and culture. Variable levels of interaction with other visitors at visitor nodes and depending on the season.	Several basic, bookable (low fee) on-track campsites. Maps and guidebook available as paper copies. Range of accommodation at nearby towns.	Comprehensive online information and links to partners. Range of guided and self-guided tours along parts of the route and nearby areas. Luggage and walker transport services. No public transport available to track access points.	Track guidebook and plant identification guide can be ordered from website. Interpretation offered by tour operators.

TRAIL	LOCATION	ROUTE/TRACK	EXPERIENCE	ACCOMMODATION	SERVICES	INTERPRETATION
Light to Light Walk	Walk along the coastline of Ben Boyd National Park near Eden on the far south coast of NSW. About 7 hours' drive south of Sydney.	30km, 2– 3 day walk. Well-marked route, generally easy, between Boyd's Tower (at Edrom) and Green Cape Lighthouse.	Coastal scenery – sea cliffs, red rocks, forest, tea tree, heath and banksia woodland environments, marine wildlife. Beach experiences. History of coastal settlement, shipwrecks and whaling at and near Green Cape Lighthouse (the end point of the walk). Interaction with other visitors likely at campground (which are accessible by vehicles and popular) and near Green Cape Lighthouse	Online information on route, logistics, safety and campground booking. Two bookable (low fee) on-track campgrounds at Saltwater Creek and Bittangabee Bay. Green Cape Lighthouse Keepers' Cottages bookable through the park service. Range of off-track accommodation at Eden, Twofold Bay and the vicinity.	Several guided walking tours utilising campgrounds or off-track accommodation. Some offer linked kayaking experiences. Walker and luggage transport services.	Free downloadable phone app on the walk. Some online information on natural and cultural features. On-site interpretation at Boyd's Tower and Green Cape Lighthouse. Interpretation offered by tour operators.
Abel Tasman Coast Track (NZ)*	Between Marahau and Wainui Bay traversing Abel Tasman National park in the north-east of new Zealand's South Island. 60km from the visitor destination of Nelson.	60km, 3 to 5 days walk. Well-market track with some steep and rough sections. Easy to intermediate level walking. Independent or guided walking.	One of NZ's Great Walks along beaches and through lush forests. Opportunities for swimming, wildlife watching, kayaking. High visitor numbers and high-volume visitor nodes can detract for the experience.	Comprehensive website (Great Walk website) and online booking. Numerous bookable (small fee) on-track campsites and 4 huts operated by the Department of Conservation. Numerous nearby private accommodation partners, including houseboat accommodation.	Numerous guided and serviced tour options for different markets, including a walk/kayak product. Water taxi services offer walker and luggage transfers to accommodation and between different walk sections.	Free downloadable track guide and app. Online information on natural and cultural features. Interpretation offered by tour operators.
Proposed Great Lakes Walk and Aquatic Trail	Between Pacific Palms, Seal Rocks and Tea Gardens, with sections through Myall Lakes National park, in the	Total 5 day-4 night combined walking and kayaking journey – 3-day walk and 2-day kayaking.	Diverse, pristine coastal and wetland landscapes, ecosystems and wildlife - coastal cliffs, beaches, lakes and lake Access to secluded beaches.	Proposed availability of a range of accommodation options near the trail, including in trail-side towns and villages, in historic buildings and in secluded areas.	Provision of comprehensive online information is proposed. Opportunities for a range of services – guided and self-guided tours, walker and	Proposed for an Interpretation Strategy to be developed to guide storytelling featuring the area's natural, Aboriginal and historic values. Potential methods include a

TRAIL	LOCATION	ROUTE/TRACK	EXPERIENCE	ACCOMMODATION	SERVICES	INTERPRETATION
	mid north coast of NSW. Pacific Palms is about 3.5 hours' drive north of Sydney.	Able to be experienced in shorter sections. Proposed well-signed Class 3 walking track. Proposed operators for the kayaking legs to ensure use of the most appropriate reaches of the lakes dependent on the weather and visitor safety considerations. Seal Rocks is the only higher volume node on the route. Careful design is proposed to minimise visitor interaction at Seal Rocks if desired.	Potential Aboriginal experiences. Historic heritage and contemporary coastal village life and culture. Local food and produce. Combined walk and kayak experience. Remote experience of Myall Lakes on kayaks and houseboat.	Proposed houseboat accommodation for the kayaking sections. Potential for exclusive, fully serviced, private accommodation.	luggage transport, exclusive fully serviced products.	downloadable app, on-track interpretation and training of commercial guides in interpretation related to the Trail.

Appendix C – Economic Impact Assessment References and Assumptions

References

- Ausplay Data 2022 – Bushwalking Participation Rate
- Local Government Area Profiles , Byron LGA , 2019 Tourism Research Australia
- Local Government Area Profiles , Ballina LGA , 2019 Tourism Research Australia
- Local Government Area Profiles , Port Stephens LGA , 2019 Tourism Research Australia
- Local Government Area Profiles , Mid-Coast LGA , 2019 Tourism Research Australia
- Local Government Area Profiles , Kempsey LGA , 2019 Tourism Research Australia
- Local Government Area Profiles , Coffs Harbour LGA , 2019 Tourism Research Australia
- Local Government Area Profiles , Clarence Valley LGA , 2019 Tourism Research Australia
- Local Government Area Profiles , Port Macquarie LGA , 2019 Tourism Research Australia
- New South Wales Government Guide to Cost -Benefit Analysis, NSW Treasury TPP17-03, March 2017

Modelling assumptions

TRAIL USER ESTIMATES

Assumptions	Population & Visitors	Bushwalking Participation Rate	Take up rate	Growth from Year 4
Assumptions (All Trails)		7.1% (Ausplay 2022)	% of potential bushwalkers who decided to use trail	2% per year from Year 4 onwards all trail users
Locals - Segments	ABS Census 2021 - Total LGA Population	7.1%	ave 2 walks per year	2% per year
Day Visitors - Segments	TRA LGA Profile 2019 - Day visitors	7.1%	10%	2% per year
Overnight Visitors - Segments	TRA LGA Profile 2019 - Total Overnight Visitors	7.1%	12%	2% per year
Overnight Visitors - Full Trail	TRA LGA Profile 2019 - Total Overnight Visitors	7.1%	10%	2% per year

SPENDING ESTIMATES

Signature Trails	Average Spending (\$2023) person/day				Duration of Stay	
	Locals	Day Visitors - Segments	Overnight Visitors - Segments	Overnight Visitors - Full Trail	Overnight Visitors - Segments	Overnight Visitors - Full Trail
Byron Ballina Walk	\$15	\$93	\$218	\$218	2	3
Yuraygir Coastal Walk	\$15	\$107	\$125	\$125	3	4
Solitary Islands Walk	\$15	\$159	\$141	\$141	3	4
Five Headlands Walk	\$15	\$88	\$109	\$109	3	4
Port Macquarie Walk	\$15	\$131	\$165	\$165	2	3
Forster / Great Lakes Walk	\$15	\$104	\$128	\$128	3	4
Tomaree Coastal Walk	\$15	\$91	\$201	\$201	2	4

TRAIL USER ESTIMATES

The following table shows estimates of users of trails by type of user.

Trail Users	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10
Byron Ballina Walk <Byron & Ballina LGAs>			Growth 2%	1.02						
Locals - Segments	11,703	11,703	11,703	11,937	12,175	12,419	12,667	12,921	13,179	13,442
Day Visitors - Segments	11,168	11,168	11,168	11,392	11,619	11,852	12,089	12,331	12,577	12,829
Overnight Visitors - Segments	12,686	12,686	12,686	12,940	13,199	13,463	13,732	14,007	14,287	14,573
Overnight Visitors - Full Signature Trail	10,572	10,572	10,572	10,783	10,999	11,219	11,443	11,672	11,906	12,144
Byron Ballina Walk	46,129	46,129	46,129	47,052	47,993	48,952	49,931	50,930	51,949	52,988
Yuraygir Coastal Walk <Clarence Valley LGA>										
Locals - Segments	7,684	7,684	7,684	7,838	7,995	8,155	8,318	8,484	8,654	8,827
Day Visitors - Segments	4,139	4,139	4,139	4,222	4,307	4,393	4,481	4,570	4,662	4,755
Overnight Visitors - Segments	5,453	5,453	5,453	5,562	5,673	5,787	5,902	6,020	6,141	6,264
Overnight Visitors - Full Signature Trail	4,544	4,544	4,544	4,635	4,728	4,822	4,919	5,017	5,117	5,220
Yuraygir Coastal Walk	21,820	21,820	21,820	22,257	22,702	23,156	23,619	24,092	24,573	25,065
Solitary Islands Coastal Walk <Coffs Harbour LGA>										
Locals - Segments	11,184	11,184	11,184	11,407	11,636	11,868	12,106	12,348	12,595	12,847
Day Visitors - Segments	5,169	5,169	5,169	5,272	5,378	5,485	5,595	5,707	5,821	5,937
Overnight Visitors - Segments	7,941	7,941	7,941	8,099	8,261	8,427	8,595	8,767	8,942	9,121
Overnight Visitors - Full Signature Trail	6,617	6,617	6,617	6,750	6,885	7,022	7,163	7,306	7,452	7,601
Solitary Islands Walk	30,910	30,910	30,910	31,529	32,159	32,802	33,458	34,128	34,810	35,506
Five Headlands Trails <Kempsey LGA>										
Locals - Segments	4,358	4,358	4,358	4,445	4,534	4,624	4,717	4,811	4,907	5,006
Day Visitors - Segments	1,598	1,598	1,598	1,629	1,662	1,695	1,729	1,764	1,799	1,835
Overnight Visitors - Segments	2,726	2,726	2,726	2,781	2,837	2,893	2,951	3,010	3,070	3,132
Overnight Visitors - Full Signature Trail	2,272	2,272	2,272	2,317	2,364	2,411	2,459	2,508	2,559	2,610
Five Headlands Walk	10,954	10,954	10,954	11,173	11,396	11,624	11,857	12,094	12,336	12,582

Trail Users	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10
Port Macquarie <Port Macquarie LGA>										
Locals - Segments	12,320	12,320	12,320	12,567	12,818	13,074	13,336	13,603	13,875	14,152
Day Visitors - Segments	5,275	5,275	5,275	5,381	5,488	5,598	5,710	5,824	5,941	6,060
Overnight Visitors - Segments	7,677	7,677	7,677	7,830	7,987	8,146	8,309	8,475	8,645	8,818
Overnight Visitors - Full Signature Trail	6,397	6,397	6,397	6,525	6,656	6,789	6,924	7,063	7,204	7,348
Port Macquarie	12,320	12,320	12,320	12,567	12,818	13,074	13,336	13,603	13,875	14,152
Forster / Great Lakes Walk <Mid-Coast LGA>										
Locals - Segments	13,714	13,714	13,714	13,989	14,268	14,554	14,845	15,142	15,444	15,753
Day Visitors - Segments	8,186	8,186	8,186	8,350	8,517	8,687	8,861	9,038	9,219	9,403
Overnight Visitors - Segments	9,568	9,568	9,568	9,759	9,955	10,154	10,357	10,564	10,775	10,991
Overnight Visitors - Full Signature Trail	7,973	7,973	7,973	8,133	8,295	8,461	8,631	8,803	8,979	9,159
Forster / Great Lakes Walk	39,442	39,442	39,442	40,231	41,035	41,856	42,693	43,547	44,418	45,306
Tomaree Coastal Walk <Port Stephens LGA>										
Locals - Segments	10,689	10,689	10,689	10,903	11,121	11,343	11,570	11,802	12,038	12,279
Day Visitors - Segments	5,758	5,758	5,758	5,873	5,991	6,111	6,233	6,357	6,485	6,614
Overnight Visitors - Segments	6,484	6,484	6,484	6,613	6,746	6,881	7,018	7,159	7,302	7,448
Overnight Visitors - Full Signature Trail	5,403	5,403	5,403	5,511	5,621	5,734	5,848	5,965	6,085	6,206
Tomaree Coastal Walk	28,334	28,334	28,334	28,901	29,479	30,068	30,670	31,283	31,909	32,547

TRAIL USER SPENDING ESTIMATES

The following shows estimates of spending in region by trail users.

Trail Users Spending \$ million (2023 prices)	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10
Byron Ballina Walk <Byron & Ballina LGAs>			Growth 2%	1.02						
Locals - Segments	\$0.176	\$0.176	\$0.176	\$0.179	\$0.183	\$0.186	\$0.190	\$0.194	\$0.198	\$0.202
Day Visitors - Segments	\$1.039	\$1.039	\$1.039	\$1.059	\$1.081	\$1.102	\$1.124	\$1.147	\$1.170	\$1.193
Overnight Visitors - Segments	\$5.519	\$5.519	\$5.519	\$5.629	\$5.741	\$5.856	\$5.973	\$6.093	\$6.215	\$6.339
Overnight Visitors - Full Signature Trail	\$6.898	\$6.898	\$6.898	\$7.036	\$7.177	\$7.320	\$7.467	\$7.616	\$7.768	\$7.924
Byron Ballina Walk	\$13.631	\$13.631	\$13.631	\$13.904	\$14.182	\$14.465	\$14.755	\$15.050	\$15.351	\$15.658
Yuraygir Coastal Walk <Clarence Valley LGA>										
Locals - Segments	\$0.115	\$0.115	\$0.115	\$0.118	\$0.120	\$0.122	\$0.125	\$0.127	\$0.130	\$0.132
Day Visitors - Segments	\$0.443	\$0.443	\$0.443	\$0.452	\$0.461	\$0.470	\$0.479	\$0.489	\$0.499	\$0.509
Overnight Visitors - Segments	\$2.045	\$2.045	\$2.045	\$2.086	\$2.127	\$2.170	\$2.213	\$2.258	\$2.303	\$2.349
Overnight Visitors - Full Signature Trail	\$2.272	\$2.272	\$2.272	\$2.317	\$2.364	\$2.411	\$2.459	\$2.508	\$2.559	\$2.610
Yuraygir Coastal Walk	\$4.875	\$4.875	\$4.875	\$4.972	\$5.072	\$5.173	\$5.277	\$5.382	\$5.490	\$5.600
Solitary Islands Coastal Walk <Coffs Harbour LGA>										
Locals - Segments	\$0.168	\$0.168	\$0.168	\$0.171	\$0.175	\$0.178	\$0.182	\$0.185	\$0.189	\$0.193
Day Visitors - Segments	\$0.822	\$0.822	\$0.822	\$0.838	\$0.855	\$0.872	\$0.890	\$0.907	\$0.926	\$0.944
Overnight Visitors - Segments	\$3.359	\$3.359	\$3.359	\$3.426	\$3.495	\$3.564	\$3.636	\$3.708	\$3.783	\$3.858
Overnight Visitors - Full Signature Trail	\$3.732	\$3.732	\$3.732	\$3.807	\$3.883	\$3.961	\$4.040	\$4.121	\$4.203	\$4.287
Solitary Islands Walk	\$8.081	\$8.081	\$8.081	\$8.242	\$8.407	\$8.575	\$8.747	\$8.922	\$9.100	\$9.282
Five Headlands Trails <Kempsey LGA>										
Locals - Segments	\$0.065	\$0.065	\$0.065	\$0.067	\$0.068	\$0.069	\$0.071	\$0.072	\$0.074	\$0.075
Day Visitors - Segments	\$0.141	\$0.141	\$0.141	\$0.143	\$0.146	\$0.149	\$0.152	\$0.155	\$0.158	\$0.161
Overnight Visitors - Segments	\$0.892	\$0.892	\$0.892	\$0.909	\$0.928	\$0.946	\$0.965	\$0.984	\$1.004	\$1.024
Overnight Visitors - Full Signature Trail	\$0.991	\$0.991	\$0.991	\$1.010	\$1.031	\$1.051	\$1.072	\$1.094	\$1.116	\$1.138
Five Headlands Walk	\$2.088	\$2.088	\$2.088	\$2.130	\$2.172	\$2.216	\$2.260	\$2.305	\$2.352	\$2.399
Port Macquarie <Port Macquarie LGA>										
Locals - Segments	\$0.185	\$0.185	\$0.185	\$0.188	\$0.192	\$0.196	\$0.200	\$0.204	\$0.208	\$0.212

Trail Users Spending \$ million (2023 prices)	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10
Day Visitors - Segments	\$0.691	\$0.691	\$0.691	\$0.705	\$0.719	\$0.733	\$0.748	\$0.763	\$0.778	\$0.794
Overnight Visitors - Segments	\$2.533	\$2.533	\$2.533	\$2.584	\$2.636	\$2.688	\$2.742	\$2.797	\$2.853	\$2.910
Overnight Visitors - Full Signature Trail	\$3.167	\$3.167	\$3.167	\$3.230	\$3.294	\$3.360	\$3.428	\$3.496	\$3.566	\$3.637
Port Macquarie	\$6.576	\$6.576	\$6.576	\$6.707	\$6.841	\$6.978	\$7.118	\$7.260	\$7.405	\$7.553
Forster / Great Lakes Walk <Mid-Coast LGA>										
Locals - Segments	\$0.206	\$0.206	\$0.206	\$0.210	\$0.214	\$0.218	\$0.223	\$0.227	\$0.232	\$0.236
Day Visitors - Segments	\$0.851	\$0.851	\$0.851	\$0.868	\$0.886	\$0.903	\$0.922	\$0.940	\$0.959	\$0.978
Overnight Visitors - Segments	\$3.674	\$3.674	\$3.674	\$3.748	\$3.823	\$3.899	\$3.977	\$4.056	\$4.138	\$4.220
Overnight Visitors - Full Signature Trail	\$4.082	\$4.082	\$4.082	\$4.164	\$4.247	\$4.332	\$4.419	\$4.507	\$4.597	\$4.689
Forster / Great Lakes Walk	\$8.814	\$8.814	\$8.814	\$8.990	\$9.170	\$9.353	\$9.540	\$9.731	\$9.925	\$10.124
Tomaree Coastal Walk <Port Stephens LGA>										
Locals - Segments	\$0.160	\$0.160	\$0.160	\$0.164	\$0.167	\$0.170	\$0.174	\$0.177	\$0.181	\$0.184
Day Visitors - Segments	\$0.524	\$0.524	\$0.524	\$0.534	\$0.545	\$0.556	\$0.567	\$0.579	\$0.590	\$0.602
Overnight Visitors - Segments	\$2.606	\$2.606	\$2.606	\$2.659	\$2.712	\$2.766	\$2.821	\$2.878	\$2.935	\$2.994
Overnight Visitors - Full Signature Trail	\$4.344	\$4.344	\$4.344	\$4.431	\$4.520	\$4.610	\$4.702	\$4.796	\$4.892	\$4.990
Tomaree Coastal Walk	\$7.635	\$7.635	\$7.635	\$7.788	\$7.943	\$8.102	\$8.264	\$8.430	\$8.598	\$8.770

