



Gippsland Lakes Aquatic Trail **FEASIBILITY STUDY AND BUSINESS CASE**

July 2021

Destination **GIPPSLAND**

Destination **GIPPSLAND**

This report was prepared by TRC Tourism for Destination Gippsland in relation to the development of Gippsland Lakes Aquatic Trail Feasibility and Business Case.

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Acknowledgement

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

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Contents

	Executive Summary	i
<u>1</u>	<u>Background</u>	<u>1</u>
<u>2</u>	<u>The Opportunity</u>	<u>7</u>
<u>3</u>	<u>Product Development</u>	<u>19</u>
<u>4</u>	<u>Planning Considerations</u>	<u>52</u>
<u>5</u>	<u>Market Assessment</u>	<u>59</u>
<u>6</u>	<u>Demand Estimates</u>	<u>68</u>
<u>7</u>	<u>Economic and Social Assessment</u>	<u>74</u>
<u>8</u>	<u>Marketing</u>	<u>77</u>
<u>9</u>	<u>Investor Attraction</u>	<u>81</u>
<u>10</u>	<u>Governance Arrangements</u>	<u>85</u>
<u>APPENDIX A.</u>	<u>DETAILS OF JOURNEYS</u>	<u>88</u>
<u>APPENDIX B.</u>	<u>INFRASTRUCTURE REVIEW</u>	<u>124</u>
<u>APPENDIX C.</u>	<u>MAPS OF PLANNING ZONES</u>	<u>130</u>
<u>APPENDIX D.</u>	<u>MARKET TRENDS</u>	<u>134</u>
<u>APPENDIX E.</u>	<u>ECONOMIC IMPACTS OF PUBLIC AND PRIVATE</u>	
	<u>SECTOR ACCOMMODATION INVESTMENT</u>	<u>143</u>
<u>APPENDIX E1.</u>	<u>PUBLIC SECTOR INVESTMENT</u>	<u>143</u>
<u>APPENDIX E2.</u>	<u>PRIVATE SECTOR INVESTMENT</u>	<u>180</u>

Executive Summary

The Gippsland Lakes Aquatic Trail (GLAT) is an immersive nature-based experience that positions the Gippsland Lakes as Australia's premiere destination for aquatic environment adventures.

GLAT offers a combination of walking, cycling and water-based journeys that can be curated into 'choose your own' adventure itineraries and features prominent cultural storytelling of and by the local Gunaikurnai community.

Visitors choose their preferred level of engagement, challenge and means of exploration with the ability to undertake fully guided, partly or self-supported trip itineraries according to preference and ability.

The Gippsland Lakes Aquatic Trail highlights the natural, historical and cultural features of the Gippsland Lakes, exploring water-based environments from land and on water using four 'foundation trail' itineraries as a basis for undertaking active and engaging journeys that cater to all levels and a myriad of outdoor recreation interests. The suite of trails can be explored via short, full- and multi-day trips as suits visitor preferences and are freely accessible for local community use.

The four trail itineraries offer visitors a guideline as to how best explore the unique features of the Gippsland Lakes. The coordinated trail network will be showcased by a leading 'Signature Trail' experience with three supporting trail itineraries that deliver visitors meaningful interactions with nature and associated cultural highlights, particularly that of the Gunaikurnai people. All itineraries offer variations of walking, paddling, cycling and boat transfers exploring the diverse waterway, wetland, lake, riverside, beach and hinterland environments that make the Gippsland Lakes a highly unique and desirable destination for walkers, cyclists, paddlers, birdwatchers, cultural and heritage enthusiasts.

Accommodation options range from existing campsites and facilities enroute, to off-trail commercial accommodations catering to all budgets, styles and preferences. It is proposed to establish two new eco-camp accommodations specifically catering to Gippsland Lakes Aquatic Trail experiences, sited sensitively and sustainably at Nyerimilang and Rotamah Island. The Gippsland Lakes Aquatic Trail can, however, be implemented in stages allowing operation prior to construction of the eco accommodations, with existing accommodation and camping sites already enabling multi-day visitation and engagement.

The estimated cost of developing base infrastructure and trail upgrades required to create the desired Gippsland Lakes Aquatic Trail concept is estimated at \$11,982,360, including the establishment of the two eco-camps and a 20% contingency.

Visitor demand and economic modelling suggests that by Year 5 the trail network will host between 158,000 and 197,000 (low to high case) visitors.

The development and connections will generate substantial positive economic benefits for the region, during the construction phase and in the operations phase.

- For a medium case scenario, total spending increases from \$38.5 million in year 1 to \$55.7 million in year 10.
- A total of 41.7 FTE jobs (33.6 direct jobs and 8.1 indirect/induced jobs) would be generated in the region during the construction period.
- The operation of the trails would generate a total of 153.7 direct full-time equivalent jobs in year 1, increasing to 222.4 direct FTE jobs in Year 10.

The present value of total benefits (\$130.766 million) generated by the investment are 8.7 times the total costs of the project (\$15.00 million) over a 10-year period.

There will also be significant opportunities for the further development of Gunaikurnai cultural representation and community development. Some of the opportunities for the Gunaikurnai will emerge over time as the priorities for business development within GLaWAC emerge.

Created as envisioned, the Gippsland Lakes Aquatic Trail will be a pioneering nature-based experience operating as one of the first prescribed, branded and marketed multi-activity, culturally engaged, aquatic environment tourism offerings in Australia.

The concept experience will be achieved through:

- opportunities for visitors to engage with Gunaikurnai people to understand cultural stories and connect with country
- a suite of trail elements enabling the visitor to curate their own experience, be guided or follow a range of pre-defined itineraries
- well planned, designed and sustainable infrastructure and effective governance
- Industry partnerships (including with Gunaikurnai) to deliver supported, interpreted and accommodated experiences.



1 Background

1.1 PROJECT SCOPE AND HISTORY

Destination Gippsland is seeking a Feasibility Business Case and Detailed Design plan that builds on the current Aquatic Trail pre-feasibility planning and will deliver a nationally significant tourism product and market-based opportunity that is shovel ready.

This Feasibility Business Case:

- Determines the project's feasibility and outlines the economic, social and cultural benefits
- Finalises route recommendations and construction considerations
- Builds on previous analysis to identify commercial opportunities and investment potential, including economic modelling
- Identifies target markets and trends to enable year-round visitation, increased visitor dispersal and increased length of stay in region
- Utilises stakeholder engagement and community consultation to gain support, endorsement and approval for the project. This has included consultation with Traditional Owners - Gunaikurnai Land and Water Aboriginal Corporation (GLaWAC), Land Managers, Planning Agencies, East Gippsland Shire Council, Wellington Shire Council, Industry, Education and Government.

1.2 APPROACH

This Feasibility Business Case builds on a substantial body of work that has highlighted the potential of this opportunity, including:

- *The Gippsland Lakes Trail* report by Martin Richardson (2015) that developed a preliminary concept for the trail
- *The Gippsland Lakes Ecotourism Tourism Action Plan* (Destination Gippsland (2015), which identified the opportunity for development of the Gippsland Lakes Trail
- *The Gippsland Destination Management Plan* (Destination Gippsland 2019) that identified this opportunity as a 'Hero Experience' driving the development of Gippsland as a place in which to seek 'inspired adventures'
- *The Gippsland Lakes Aquatic Trail Pre-Feasibility Assessment* (TRC - January 2021), which evaluated the potential and further developed the concept for an iconic Gippsland Lakes Aquatic Trail(s).

The following steps have been applied to analyse and develop this opportunity to deliver the completed Feasibility Business Case:

- Desktop review including analysis of trends and commercial opportunities
- Field Audit, mapping and signage review to ascertain the routing, design and construction guidelines for trails
- Design and cost estimate development
- Consultation with traditional owners, government and industry organisations, agencies, businesses and community groups to understand their vision and aspirations for the trails
- Demand analysis and economic assessment
- Identification of delivery requirements, including planning, commercial, governance, project management and investment attraction guidelines.

1.3 THE REGION

As a visitor destination, Gippsland is an emerging tourism region in Victoria with continued growth in investment and visitor numbers (allowing for COVID and bushfire impacts).

The region is comprised of six Local Government Areas (LGAs): Baw Baw Shire, East Gippsland Shire, Latrobe City, South Gippsland Shire, Wellington Shire and Bass Coast Shire.

The Gippsland region has many outstanding national parks (some of which are under joint management with the Gunaikurnai Native Title holders), a rich living indigenous culture and layers of colonial heritage. Of particular note and relevancy to this feasibility study, Gippsland is particularly strong in its nature-based tourism offering. The region boasts pristine stretches of coastline, national parks showcasing alpine peaks, old growth rainforests, high country and delicate coastal habitats.

Gippsland also boasts some of Victoria's most striking landscapes including Wilsons Promontory, Gippsland Lakes, Croajingolong National Park, Strzelecki Ranges and parts of the Australian Alps.

The Gippsland Lakes features a network of coastal lakes, rivers and lagoons in Eastern Victoria, approximately 250-300km from Melbourne. The Lakes region is internationally recognised for its environmental importance, wild beach foreshores, isolated coves and inlets, fringing wetlands including the largest coastal estuary in Australia, along with rivers and inland lakes and tributaries. It is also home to an abundance of wildlife species, contains Ramsar listed wetlands, hosts significant flora and has a rich First Nations history.

Nature-based activities are a significant component of the region's tourism experiences, with tourism hubs closely aligned with beaches, rivers, lakes and rainforests. The region's natural assets offer a wide range of opportunities for activities such as walking, trail running, kayaking and other paddle sports (i.e. stand up paddle boarding), 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. Exploration of the lakes via houseboats is also a distinctive part of the visitor offer.

Despite its diverse attractions and abundance of natural beauty, access to many parts of the Gippsland Lakes is limited, with many places are only able to be visited by watercraft. Walking and riding trails that do offer access are often short in distance or do not logically link together for longer multi-day explorations and/or have not to date been packaged into attractive visitor itineraries in a way that suitably highlights the region's natural attractions.

1.4 GUNAIKURNAI PEOPLE

The Gunaikurnai people are the Traditional Owners of the Country featured in this feasibility study. The Gunaikurnai Land and Waters Aboriginal Corporation (GLAWAC) is the corporate body that represents the interests of the Gunaikurnai people in the native title settlement.

Through Joint Management the Gunaikurnai have an equal partnership with parks authorities in managing many of the landscapes explored by the Gippsland Lakes Aquatic Trail, an arrangement that benefits from the knowledge and culture of the traditional owners and the incorporation of that knowledge into resource management, cultural awareness and knowledge of local history.

A Joint management body – Gunaikurnai Traditional Owner Land Management Board (GKTOLMB) has been established to oversee the development and implementation of the joint management plans – approved in 2018.

The Gunaikurnai and their story and culture will be integral to the development of the Gippsland Aquatic Trail experiences, and other priorities for the Gunaikurnai people as expressed through their own strategic and business planning.

1.5 STRATEGIC ALIGNMENT

The Gippsland Destination Management Plan is the guiding tourism strategy for the Gippsland Region. Released in 2019, the plan provides a series of recommendations under seven strategic areas. One of those is the development of the experiences within Gippsland that encourage new and existing markets to visit, stay and spend. Under the experience pillar of Inspired Adventure, the Gippsland Lakes Aquatic Trail is a hero experience that is listed as a significant opportunity for development.

The *Gippsland Tracks and Trails Feasibility Study* also recommended the development and implementation of the Gippsland Lakes Aquatic Trail as a signature trail for Gippsland. This report contributes to this goal by assessing the feasibility of a multi-day, multi-format trail or set of trails that provide cultural and commercial opportunities based on the outstanding Gippsland Lakes and strong link to Gunaikurnai community and culture.

Signature Trails are defined in the report as ‘... a smaller number of trails that showcase the region and offer outstanding experiences attracting people to Gippsland and the region’. Other important trails are listed in the hierarchy of trails important to the visitor economy as Regionally Significant or Locally Significant.

To ensure the desired outcomes, any trail development should meet the following criteria:

- Designed as the highest quality experience of nature and culture
- The best trail of its type
- Feature the highest-quality infrastructure fit for purpose
- Low impact on the environment
- Accessible to target markets for Gippsland and for ex-region trail visitors
- Be supported by high quality information – from pre-trip to post-trip follow up
- Be environmentally and culturally sustainable
- Be supported by effective management and good coordination within community
- Designed with good ongoing financial and fund-stream modelling
- Have a brand and reputation aligned to the target user and be well positioned in the market
- Able to deliver strong visitor number growth into Gippsland.

The experience proposed would be a mix of water and land-based adventure showcasing the coastline, estuaries, local produce of the region, beaches, views, with Gunaikurnai involvement showcasing and telling the story of Aboriginal living culture. The concept would be for a product that offers a range of self-guided, partly supported or exclusive, fully serviced and catered experiences that may also take advantage of private and/or public property holdings around the Lakes.

The Gippsland Lakes Aquatic Trail will seek to immerse visitors in the natural environment and will contain options to be accommodated in the landscape at free, facilitated or potentially commercial eco-camping (glamping) sites.

1.6 VISION AND GUIDING PRINCIPLES

1.6.1 Vision

Gippsland Lakes Aquatic Trail - connecting the best of nature and culture through exceptional land and water-based experiences.

This will be achieved through:

- opportunities for visitors to engage with Gunaikurnai people to understand cultural stories and connect with country
- a suite of trail elements enabling the visitor to curate their own experience, be guided or follow a range of pre-defined itineraries
- well planned, designed and sustainable infrastructure and effective governance
- Industry partnerships (including with Gunaikurnai) to deliver supported, interpreted and accommodated experiences.

1.6.2 Guiding principles

Aboriginal Participation

Opportunities align with aspirations of the Gunaikurnai people (through GLAWAC), contribute to awareness and understanding of their culture, respect cultural values and provide benefits for local people.

Education

The trail facilitates opportunities for learning for a broad range of users.

Engagement and community benefit

The community and user groups are involved in trail development, become ambassadors and benefit from the trails recreationally, socially and economically.

Partnerships

The optimal experiences are delivered through partnerships across sectors including tourism, education, health and environment.

Quality Trails

Trails comply with Australian / International standards and meet and/or surpass visitor expectations.

Sustainability

Trail planning and development takes into account short and long term community health, social, economic, cultural and environmental considerations and conforms to the planning and regulatory framework.

Outstanding Design to Compliment Nature

The design of the experience, infrastructure, and trails will be to a very high level that helps inspire users about the area and its people.

Trail experiences

Consideration for the range of trail expectations including walk, cycle, water-based and new and emerging trail experiences.

Working together

The Gippsland visitor economy works together to attract, retain and benefit from increased visitation.

1.7 ENGAGEMENT APPROACH AND LEARNINGS

In developing a feasibility and business case for the proposed Gippsland Aquatic Trail, TRC Tourism has engaged with stakeholders throughout the consultation process with a focus on a user-centric approach reflecting the changing dynamic of visitor and community engagement in recreational outdoor activities.

An initial Pre-Feasibility Study completed in January 2021 defined the context of the proposed development of an Aquatic Trail. This report identified potential opportunities, challenges and areas for further investigation.

Local government has been a strong driver of the project, with consultations identifying significant alignments with other recreational, planning and tourism strategies referenced by the relevant LGAs.

Critical to the project has been regular consultation with the GLAWAC recognising the importance of the strong connection to and ongoing custodianship of country throughout the Gippsland Lakes region by the **Gunaikurnai**, along with the Joint Management of its land and waterway assets in partnership with Parks Victoria. There are opportunities for Gunaikurnai to have significant and ongoing involvement with the Gippsland Lakes Aquatic Trail experience, with cooperative management and ownership models of trail development.

The discovery process via desktop, consultation and field-based study has made clear that the Gunaikurnai heritage and living culture should form a core pillar of representation and storytelling. This thematic draws not only on Gunaikurnai inherent and long connection to country, but also builds on the growing interest in First Nations' heritage within the target visitor markets.

Local community targeted discussion highlighted a degree of support for sensitively developed nature-based tourism and the opportunities for community benefit, including economic and social outcomes. Consultations have identified that a more coordinated approach will be necessary between tour operator and tourism support organisations to adequately facilitate the experiences planned for the Aquatic Trail. Concerns have been raised about the environmental and climate change implications and the need to protect the asset upon which the experience is based – something that is also fundamentally important to the success of the proposal.

The predominant land and waterway agencies consulted to date include Parks Victoria, Gippsland Ports, DELWP and GLAWAC. Engagements at this level have forecast significant planning, cost and statutory approval considerations, specifically regarding requirements for new trail build.

Extended site visits and surveying have been crucial to gaining a nuanced understanding of the environments that will host the Aquatic Trail experiences, and the current state and connectivity (or otherwise) of the Gippsland Lakes land-based trail network. Waterways and transit routes have been assessed for suitability according to the desired experience, target user markets, logistical capacity, and safety. This has informed the design of trip itineraries and linking of significant attractions, while highlighting gaps in the proposed trail alignments and requirements for new and improved infrastructure.

Site visits confirmed the trails and environments to be of a high value attraction measured against market demand and revealed opportunities and options to better link townships with nature-based attractions. Site visits also exposed deficits in the existing infrastructure including disconnected and fragmented trails, variability of trail quality and standards and general lack of cohesion as the network stands. It highlighted significant infrastructure requirements to lift the overall Aquatic Trail concept to a required level of serviceability and identified specific new build requirements including paddling facilities and eco-accommodation to deliver a Signature Trail experience.

Notably, the Gippsland Lakes Aquatic Trail concept is inclusive of trails spread over a large area across the Gippsland Lakes from the Port of Sale in the west to Nowa Nowa in the east, with numerous access points and trailheads. The Gippsland Lakes Aquatic Trail would benefit from a single pre-experience start point in the form of a gateway interpretation centre, suggested to be focused on the appropriately located Gunaikurnai Forestec Centre. Given its disparate nature spread over different forms of environment and encompassing various forms of active engagement, the Aquatic Trail would rely heavily on pre-trip and digital accessible facilitation and information, combined with proactively engaged and well-informed tourism operators.



2 The Opportunity

2.1 THE POTENTIAL OF THE EXPERIENCE

2.1.1 Targeted impact

The concept is anchored in a set of active travel itineraries that showcase Gippsland Lakes' aquatic environments, associated landscapes, flora, fauna and cultural heritage.

The proposed trails are designed to leverage multiple modes of active outdoor exploration on foot, by bike and via paddle craft and boat, to enable visitors to immerse themselves in the Gippsland Lakes environments for a meaningful interaction with nature and its associated cultural highlights, particularly that of the Gunaikurnai people.

The experience design is intended to provide a highly marketable tourism product that will be accessible and diverse, offering a range of itineraries that will service a broad visitor demographic from fully supported travel on a set itinerary to independent travellers with flexible time. Itineraries are intended to be undertaken in full or can be customisable as a 'choose your own adventure'. All experiences will focus on eco-sustainability and cultural sensitivity.

The trail itineraries are designed to tap into existing tourism nodes, activities, accommodation and services in the Gippsland Lakes region. Further, they will create impetus for the development and realisation of new tourism opportunities and economic stimulus potential, especially for tourism service businesses such as tour guides, logistics support and accommodation.

2.1.2 Going from good to great

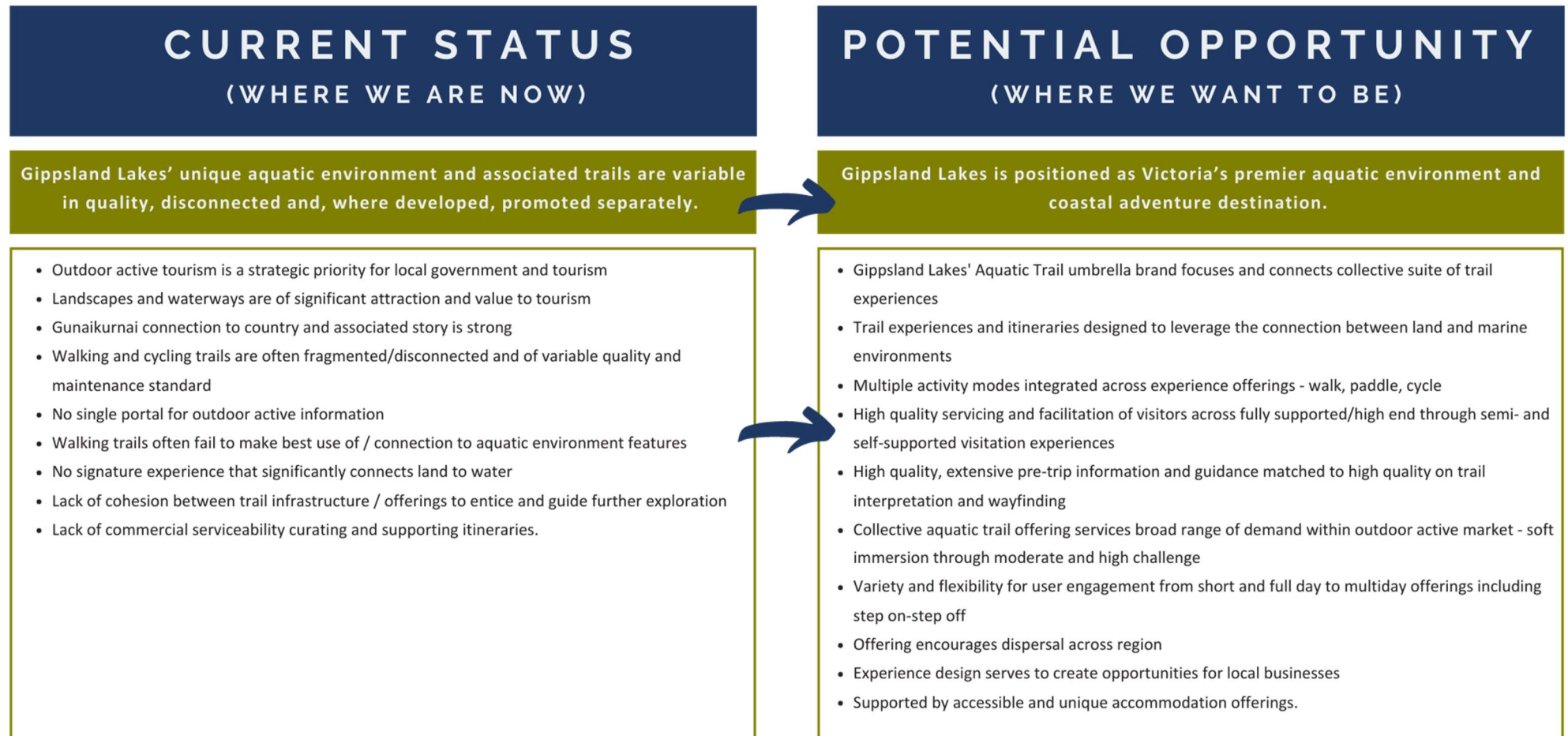
This business case recommends how an innovative and potentially market-leading experience can be delivered by leveraging existing nature-based tourism strengths, improving infrastructure, creating better connections between trails, attractions, and townships and growing the visitor market by better defining, curating and communicating the aquatic environment experiences on offer.

It recognises that the Gippsland Lakes region holds great attraction for nature-based enthusiasts and travellers across the spectrum from 'soft adventure' to more challenge-based motivations, and niche markets such as birdwatching, sea kayaking and cultural heritage.

The business case also recognises that a mainstay of Gippsland visitation is family orientated holidays and the suitability of the many Gippsland Lakes environments and activities on offer for expanding that market.

2.2 POSITIONING THE TRAILS

To be a world class experience, the Gippsland Lakes Aquatic Trail must be a distinctive experience that complements and showcases the landscape, environment and culture.



Successful trails offer visitors an immersive nature-based journey that:

- showcases unique and varied landscapes
- enables users to interact with cultures and community
- includes linked and complimentary experiences
- offers a variety of accommodation to add character and flexibility of engagement preferences
- offers ways for visitors to immerse and educate themselves through appropriate interpretation and storytelling that captures a sense of place and people
- enables visitors to engage in a variety of ways, suitable to a range of skills, experience and abilities
- allows visitors to immerse themselves in nature without impacting nature (or with as minimal a footprint as possible)
- meets demand for a variety of outdoor active interests
- can be undertaken in different timeframes according to visitor preference (short, full and multi-day).

In particular, the Gippsland Lakes Aquatic Trail should create itineraries that logically link landscapes to aquatic environments including lakes, rivers and oceans, providing an accessible journey that connects towns and communities to nearby wilderness areas.

The Aquatic Trail should leverage already recognised natural attractions and tourism nodes while seeking to explore and incorporate new or currently under-appreciated natural attractions located across the Gippsland Lakes region.

It should recognise and creatively include the different ways in which the Gippsland Lakes can be actively explored via walking, cycling and paddling with facilitation of transfers (land or water) where necessary. Development should seek to establish trail infrastructure that ensures each activity can be undertaken enjoyably and safely by a range of visitor profiles and abilities.

The representation of culture and community along the itineraries should be a primary interpretive feature, with a clear and consistent focus on Gunaikurnai heritage and living culture.

Elements of interpretation and education relating to the region's unique environment, flora and fauna should also be represented consistently in an engaging manner.

The trail network should be supported by extensive high-quality pre-trip facilitation both online and offline that connects visitors to services and tools that assist in planning and undertaking their Aquatic Trail journey.

The Aquatic Trail experience design should be focused on creating a context that supports both fully facilitated/guided and self-guided itineraries. Furthermore, trail routes and experience design should reflect the demand for scalable and flexible itineraries that encourage 'choose your own adventure,' customisable journeys.

The Aquatic Trail product should maintain a minimal footprint, ensuring environmental and community impacts are negligible, and that any development of infrastructure or new/upgraded trails benefit visitors and local communities and remain culturally and environmentally sensitive and sustainable.

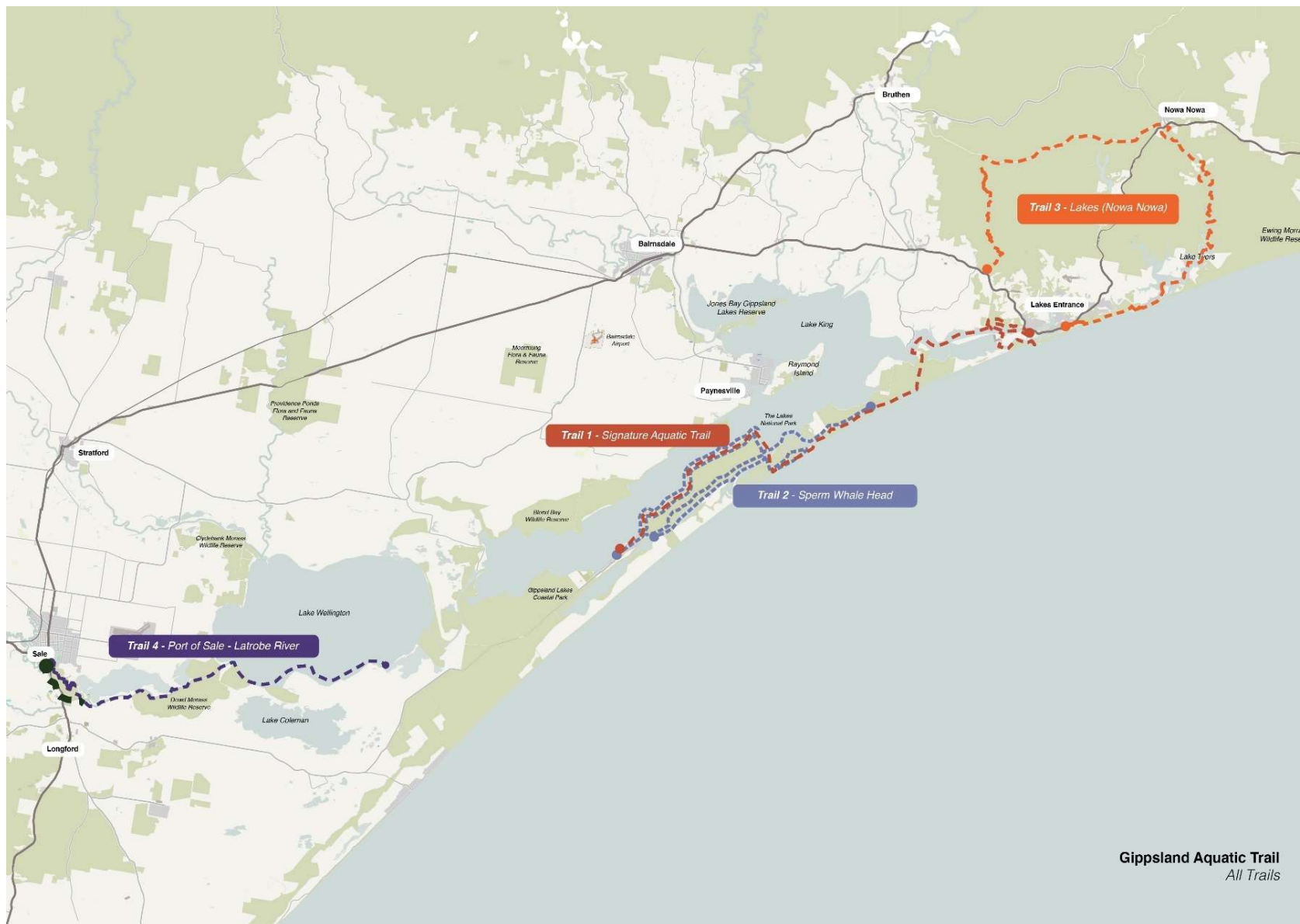
2.3 CONNECTING THE NETWORK—THE EXPERIENCES

2.3.1 The trail experience

The Gippsland Lakes Aquatic Trail is a suite of multiday mixed activity experiences designed with the flexibility to be delivered by a commercial operator in full, partly facilitated or fully self-guided. A focused 'hero' itinerary is complemented by a series of alternative prescribed experiences that service a broad range of outdoor activity interests and skill levels, feature different degrees of challenge, and explore a range of landscapes and highlight attractions of the Gippsland Lakes.

All itineraries can be experienced by a consumer wishing to curate their own trip and/or be facilitated to varying degrees. It is likely that fully supported trips will be the initial offering that will establish the brand.

Figure 1. Gippsland Lakes Aquatic Trail – All Trails



2.4 THE SIGNATURE EXPERIENCE – TRAIL #1

2.4.1 Trail #1 - 4-day, 3-nights

The signature Gippsland Lakes Aquatic Trail introduces visitors to the unique landscapes and aquatic environments of the Gippsland Lakes on a four-day, three-night journey undertaken through a combination of options including walking, cycling, kayaking and boat transfer, staying overnight in comfort at eco-cabins or eco-tents. There is a luxury option of a day spa layover (Metung Hot Springs due to open in summer 2021/22, or subject to Nunduk Spa Retreat being completed or through other Spa options) at the finish along with wetland explorations culminating at the historic Port of Sale.

The point-to-point route begins at Forestec – the home of GLaWAC before moving onto Lakes Entrance and nearby Bullock Island. Forestec will offer visitors an introduction to country and a welcome from Gunaikurnai elders or appropriate people. Visitors then continue onto Lakes Entrance west where views are south across the water toward Rigby Island and 'The Entrance' for which the area is named. A rock walled footpath leads to Kalimna Jetty and is proposed to extend around the headland to reach a crossing point over the inlet adjacent to Nyerimilang Heritage Park. A new (proposed) pedestrian bridge links to Nyerimilang Park, featuring a historic homestead, wildlife and walking tracks to be explored, before arriving at a new (proposed) eco-camp accommodation located high on the cliff with expansive views across to French Island and further to the outer sand barriers, a perfect spot for a sundowner drink.

Day Two (optional) is spent mostly on water, completing a kayaking loop of Rigby Island, with a stop off to take a short walk out along the western wall of The Entrance where dolphins and seals may be spotted, along with views along the famous Ninety Mile beach. Accommodation is back at Nyerimilang.

A boat transfer on day three includes a morning tea stop-off at the lakeside village of Metung before passengers alight across the waterway at Mosquito Point for a walk across to Bunga Arm where kayaks are moored. A tranquil paddle on the protected waters of Bunga Arm ends at Ocean Grange, a unique seaside community enclave.

For those interested in an alternative experience without paddling, a ride can be undertaken from Mosquito Arm along Jubilee Head Track to the west end of Bunga Arm where a boat transfers to Ocean Grange.

From Ocean Grange, it is a wild walk along famous Ninety Mile Beach, through wetlands, eucalypt and banksia woodland to Rotamah Island or Gellung-war in Kurnai language. The island is home to prolific bird life with over 190 species recorded. A new (proposed) eco camp is anchored by a refurbished homestead and welcoming communal space.

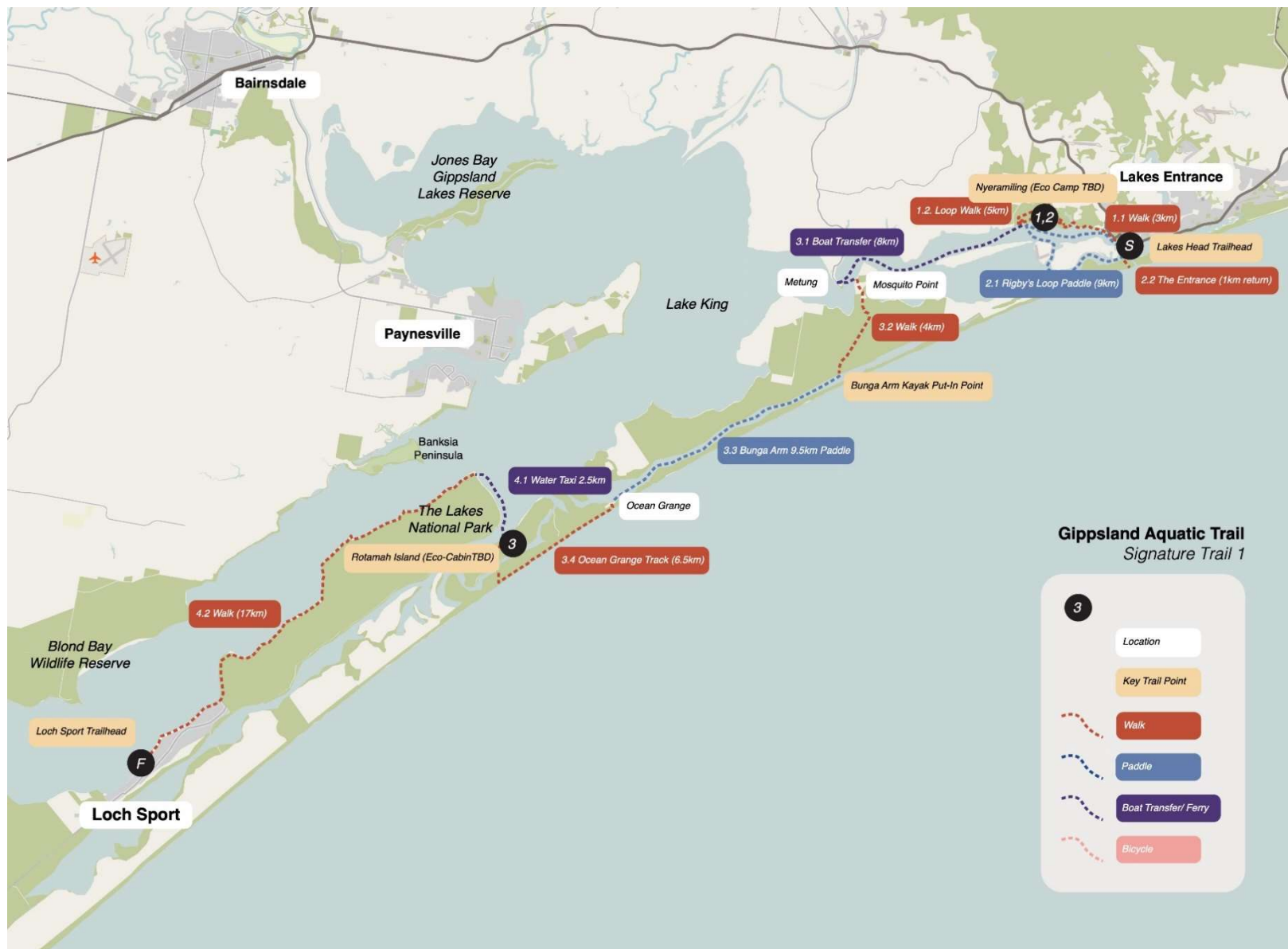
From Rotamah, visitors are picked up in the morning by boat transfer to Point Wilson on Sperm Whale Head.

For those choosing to cycle the remaining leg into Loch Sport, a short loop walk can be taken around Lake Killarney, before riding gravel tracks with views across to Rotamah. For those continuing on foot, a new (proposed) trail routes west along the northern shoreline of Sperm Whale Head, passing through unique environments inhabited by an abundance of wildlife including kangaroos, wallabies and a diverse range of birdlife.

A wild swim can be enjoyed enroute, as the trail dips to pristine beaches and back into hinterland, before rounding Pelican Point and emerging at the sleepy village of Loch Sport. Walkers can continue on an undulating singletrack all the way to the Lakeview Bar and Bistro at Loch Sport and the journey's end.

Guests can opt for an extra night in Loch Sport or choose a luxury package at a nearby (new, proposed) spa and wellness retreat, Nunduk. A night enjoyed here can be followed by an extension tour with a boat transfer across Lake Wellington and up the Latrobe River, to the Port of Sale, with optional bike ride through wetlands or a short walk through the same.

Figure 2. Trail #1 – The Signature Experience



2.5 SUPPORTING TRAILS

2.5.1 Trail #2

Trail #2 focuses on exploring the landscapes and aquatic environs of Sperm Whale Head and Rotamah Island, two highlight features of the Gippsland Lakes, along with magnificent paddling up Bunga Arm.

This trail can be undertaken in various ways linking walking, paddling and cycling legs, which can be mixed according to activity preference, weather conditions and ideal length of trip.

The route is set up for anything from a 3-day to 5-day excursion, with an extension tour conceivably added to link in the Latrobe River and Port of Sale (see Trail 4 for options).

Visitors begin in the small village of Loch Sport, choosing to walk or paddle their way to Emu Bight Camp, on the northern shore of Sperm Whale Head. This is the overnight in tented camps (proposed), with an evening swim or relaxing beach visit) nearby.

The following day, the paddle or walk is continued along the northern bank of Sperm Whale Head, with a stop at favoured local wild swimming spots Cherry Tree Beach or Trouser Point. Paddling visitors can then take on a short (4km) loop walk around the Pt Wilson environs (which will already be traversed by walking visitors), before paddling [or pre-arranged boat transfer for non-paddlers] across to Rotamah for a comfy night's rest at either an Eco-Camp (proposed) or a regular public campsite.

In the morning, paddlers head towards Ocean Grange and on into Bunga Arm where a selection of campsites can be booked. Those seeking an off-foot experience can spend the day walking in a loop from Rotamah to Ocean Grange, returning on the wild Ninety Mile Beach.

It is proposed that a form of cultural interaction and interpretation be planned for Rotamah Island with Gunaikurnai involvement (subject to Gunaikurnai approval).

On the final day, guests transfer back to Point Wilson where bikes await, for a south-side easy pedal back towards Loch Sport, stopping for a short walk at Lake Reeves Nature Trail.

Keen paddlers may prefer to continue paddling south west along protected waterways past remote lakeside beaches enroute to the paddling trail's terminus at Loch Sport.

Figure 3. Trail #2 – Supporting Trail



2.5.2 Trail #3

This trail is designed for the slightly more adventurous and/or those with a hankering to explore on two wheels as much as on water, with touchpoints at two mountain bike parks and two rail trail sections. There is opportunity to engage in cultural experiences including a sculpture park in Nowa Nowa and in future years there is potential to develop a significant Gunaikurnai cultural experience node at Bung Yarnda/Lake Tyers Mission.

The loop route takes riders north out of Lakes Entrance along the historic, scenic and undulating Gippsland Lakes Discovery Trail. The route is initially on roadside verges and trails exiting Lakes Entrance before joining a well-crafted, wide and non-technical 'rail' trail, once known as the Mississippi Trail. This trail runs through the Colquhoun State Forest and connects into Colquhoun MTB Trails, perfect for mountain bikers wanting some singletrack diversion along the way.

The Gippsland Lakes Discovery Trail connects at its northern terminus to the East Gippsland Rail Trail, where riders turn east to cycle smooth, compacted trails past an impressive trestle bridge into Nowa Nowa.

At Nowa Nowa, visitors have options to explore the nearby mountain bike trail network, explore the Sculpture Walk, or relax at the tavern.

These activities can also be taken on the following morning, before beginning a downstream kayak paddle on Boggy Creek heading towards Lake Tyers. Whilst the Nowa Nowa to Lakes Tyers Beach section can be paddled in a longer day, most paddlers will choose to break the paddle into two leisurely parts using an overnight camp on the eastern riverbank.

Day three and the final leg of the loop journey is closed with a 10km walk along trails and beach sections leading from Lake Tyers Beach to Lakes Entrance, with clifftop views at Red Bluff Surfing Beach, a sand spit crossing at Lake Bunga and on into town for some fresh fish and chips.

Figure 4. Trail #3 – Supporting Trail



2.5.3 Trail #4

A degree of flexibility is required in detailed planning of this route. At the time of preparing this plan, GLaWAC are considering options for an experience that is potentially aligned to this proposed route. Significant similarities exist between the proposals however it may take some time to determine the best fit with Gunaikurnai skills, boat requirements, capacity and aspirations. The following trail and route description may change during detailed implementation planning and execution.

From the historic Port of Sale, this journey potentially combines a significant feature of famous Bataluk Cultural Trail, with a river and wetlands journey exposing visitors to Ramsar-listed wetland environments, prolific flora and fauna, historic boat rides, easy to navigate trails and an overnight stay at a new spa retreat.

The journey is proposed to begin from the Port of Sale heading south along the canal towards the landmark Latrobe Swing Bridge (1890).

Visitors can choose from boarding a heritage cruise on the *Rubeena* (1912) – or other suitable commercial rivercraft transfers – or begin a river paddling adventure in a sea kayak, floating down what is the first section of the Sale to Sea Disability Paddle Challenge event (March, bi-annually).

The canal links the city of Sale to the Thompson River, Latrobe River and eventually the Gippsland Lakes and open sea. Ancient river redgums form part of the Ramsar-listed wetlands on the riverbank.

The passing landscape is of high cultural significance to the Gunaikurnai community with numerous points of cultural and historical interest including scar trees. The landscape – Brayakooloong Country – is a feature of the famous Bataluk Cultural Trail.

By boat or kayak, visitors arrive at the historic Latrobe Swing Bridge which is still operational. Of note to engineering and riverway buffs, it was the first of its kind in Victoria, and reportedly the oldest of its kind still existing in Australia.

At the Swing Bridge, guests can elect to take a short loop walk around the boardwalks of the internationally listed Sale Common Wetlands, which hosts freshwater marshes, red gum woodlands and an enormous variety of birdlife. A shorter point to point version of the walk (4km) can be taken if travelling by boat with passengers alighting earlier opposite the Thompson River confluence and proceeding to walk to the Swing Bridge via the Sale Common wetlands.

Just past the Swing Bridge, at the Latrobe Wharf, those travelling by boat can elect to transfer to kayak from this point on.

Continuing downstream on the Latrobe River guests reach the Heart Morass Wetlands, where kayaks and/or the boat docks. It is possible in the future subject to Nanduk Spa Resort becoming operational that paddling guests may return to boat transfer to be whisked across Lake Wellington to the proposed Nunduk Spa Retreat*, Seacombe, for a night of luxury treatment, or to other upscale accommodations in the vicinity.

A morning of relaxation would be followed by a transfer back to Heart Morass landing, where guests undertake a peaceful ride back along the banks of the Latrobe, sidling off north to follow the meandering Flooding Creek, via Sale Common boardwalks, to navigate back into the heart of Sale via Lake Guyatt and Guthridge and finishing with a visit to the Gippsland Art Gallery.

* Note that Nunduck Spa Retreat is currently in planning phase with construction timelines still to be confirmed. In the interim, Trail#4 becomes a single-day excursion with visitors transitioning directly to a cycling leg after appropriate guided interpretation of the Heart Morass Wetlands and/or short walk.

Other commercial accommodation and tour operators may look to the Heart Morass change-over node as a pick up/drop off point for extended stay tour variations in the absence of Nunduck Spa Retreat.

The Heart Morass wetland environment and visitor node also provides excellent opportunity for further developing Gunaikurnai experiences linked to the Trail #4 route.

Figure 5. Trail #4 – Supporting Trail – details to be confirmed with GLaWAC in conjunction with their planning underway (as of July 2021).



3 Product Development

3.1 TRAIL INFRASTRUCTURE

Routes have been designed to optimise existing and quality trail networks to reduce new trail build requirements from both an environmental and cost perspective. However, some new trail construction and supporting infrastructure is required to achieve the outstanding desired experiences. An infrastructure review was completed in March 2021 to confirm gaps and requirements in line with the development of the updated trails (see section 2.3).

3.1.1 New trail & associated infrastructure requirements

There are four primary new trail and associated infrastructure build requirements identified as important to the feasibility of three of the four identified Gippsland Aquatic Trails:

- **KALIMNA JETTY TO NYERIMILANG** – 700 metres of rock wall reinforced pathway or raised steel walkway connecting to a 70m footbridge
- **LOCH SPORT TO POINT WILSON** – a total of 11km of new trail build identified, plus associated infrastructure (stairs, boardwalks), **plus an** upgrade of existing trails of approx. 5km (max) at the eastern end of Sperm Whale Head
- **RED BLUFF TO BEACH/LAKE BUNGA** – a total of 600 metres of new trail build plus one set of stairs

*note that this does not include other minor trail upgrade work across the trails as identified in Infrastructure Review (see Appendix B).

3.1.2 Kalimna Jetty to Nyerimilang trail and pedestrian bridge

It is recommended that a new trail be constructed to enable visitors to journey west from Kalimna Jetty in order to access Nyerimilang Heritage Park (and proposed eco-camp) via a new footbridge. The trail could be constructed in a similar manner to the existing rock wall pathway leading from Jemmies Point to Kalimna Jetty on the east side. Alternatively, other forms of raised platform walkway could be investigated to adapt to the steep-sided headland landscape between the jetty and inlet crossing.

The proposed new trail will provide multiple benefits not only to the project – but also in linking Lakes Entrance to Nyerimilang Homestead – and through the provision of a trail for recreation and lifestyle improvements for Lakes Entrance residents and visitors alike. Additional benefits may include protection of the cliffs from erosion providing a climate change adaptation mechanism for the Coastal Reserve and private property above the banks.

A new pedestrian bridge is required to link the proposed new extension of the Kalimna Jetty Walk with the Nyerimilang Heritage Park, via crossing the Maringa Creek delta. The pedestrian bridge would be approximately 70 metres in primary length with potential extension boardwalks on the western side to contend with low lying and sensitive landscapes and any cyclical rise in water levels. Design of the footbridge would need to consider potential boating passage (small fishing, kayak and other paddle craft) into the inlet, along with environmental sustainability considerations. Figure 4 below provides a map-based description.

REQUIREMENTS: 700 metres of new waterside trail leading west from Kalimna Jetty, as a continuation of the existing rock wall path. The new walkway would extend from Kalimna Jetty to the identified crossing point opposite Nyerimilang Heritage Park, where a new pedestrian bridge of approximately 70 metres is required.

Figure 6. Kalimna Jetty to Nyerimilang



3.1.3 Loch Sport to Pt Wilson Trail (Trails #1 and #2)

It is recommended that a new trail be constructed from the east side of Pelican Point at the intersection of Pelican Point Track and Oil Bore Track, routed north east along the northern shore of Sperm Whale Head, linking in with Boolella track, leading into Emu Bight Campground. This section is 3.5km.

New build trail should then continue north-east from the eastern side of Emu Bight Campground, tracking north staying between the shoreline and Lake Victoria Track, remaining out of sight of the 4WD Lake Victoria Track where possible. This trail should continue north-east until reaching the western tip of Lake Killarney where an older trail network can be linked in to (NOTE: this network requires upgrading). The distance for this section is 7.5km.

A network of trails exists from the eastern and southern sides of Lake Killarney. It is highly recommended that this network be reviewed and upgraded to improve the walking experience and better service visitors while remaining environmentally sensitive and ecologically sound. This section is 5km.

The recommended new build and upgrade is critical to the success of Trails #1 and 3 in this study, however they would also serve to create better general visitation experiences, allowing for various iterations of Trails #1 and #2, along with multiple iterations of day walks. The recommended new and upgraded trails would foster and facilitate:

- Point to point and return walking journeys from Loch Sport > Emu Bight Campground > Point Wilson (and return)
- Multi activity experience walk Loch Sport > Emu Bight > Point Wilson and return via bike on Lake Reeve Track
- Single day loop walks from Pt Wilson, including bird watching specific
- Gunaikurnai cultural experiences in landscape
- Better access to and enjoyment of the unique landscapes offered around Lake Killarney and environs.

Figures 7,8,9,10 and 11 below provide map based descriptions of the proposed new infrastructure

REQUIREMENTS: new trail build along the northern side of Sperm Whale Head totalling approximately 11km, designed low impact and to meet user expectations of a quality experience. Approximately 5km of trail within the existing network at the eastern end to be upgraded and remodelled for improved walking experience and logical loops and links. Investigate improved birdwatching infrastructure and interpretation hold points.

Figure 7. Sperm Whale Head Trail Development Plan

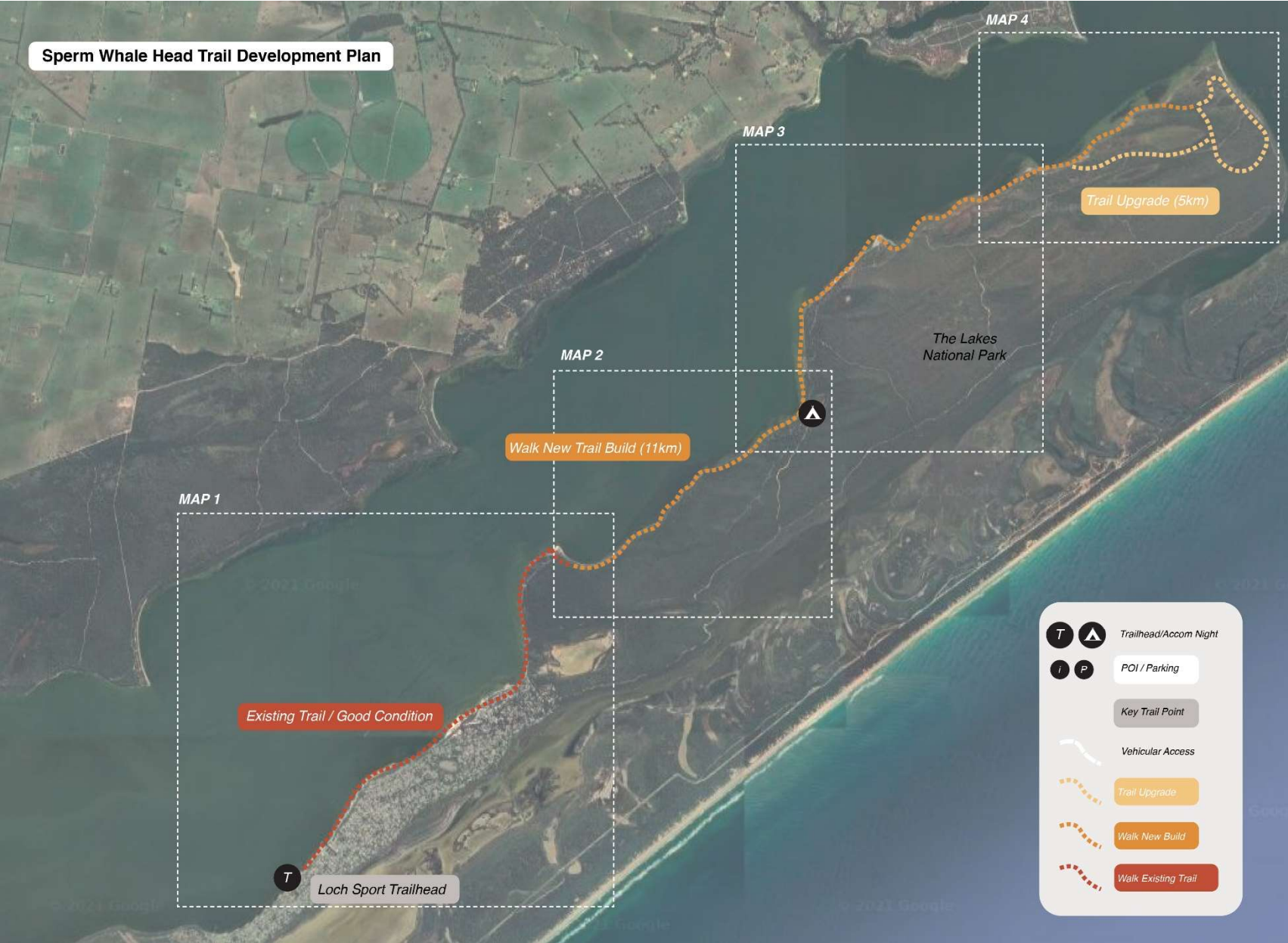


Figure 8. Sperm Head Trail – Section 1

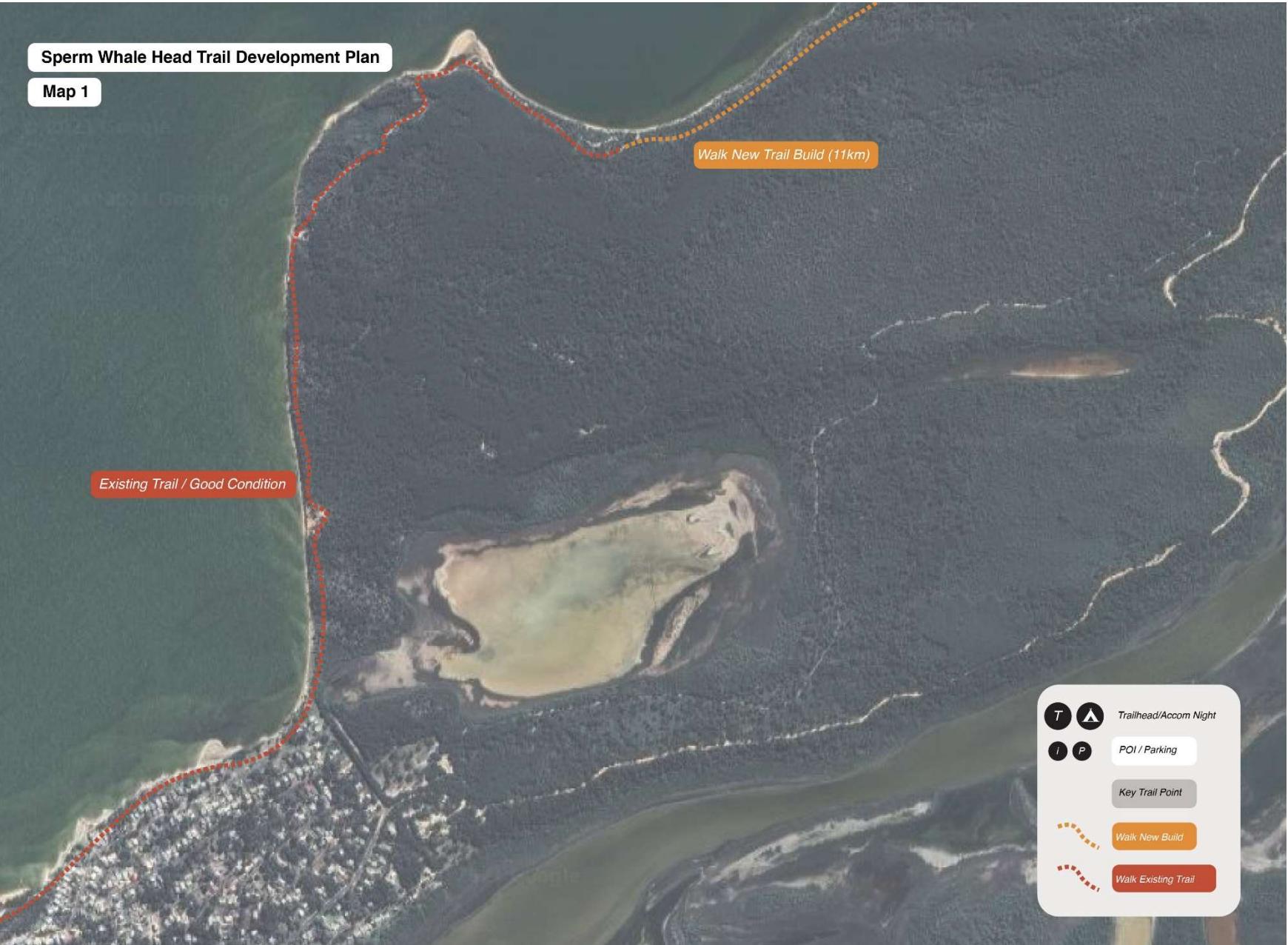


Figure 9. Map 2 - Sperm Whale Head Trail – Section 2



Figure 10. Map 3 - Sperm Whale Head Trail – Section 3



Figure 11. Map 4 - Sperm Whale Head Trail – Section 4



Figure 12. Photos showing the current condition of selected Sperm Whale Head Trails



3.1.4 Red Bluff Traverse to Beach Access (Trail #3)

It is recommended that a trail connection be created enabling a link between Lakes Entrance and Lake Tyers Beach, utilising the beach and natural sand barrier of Lake Bunga on the western side, some existing trails and new build trail on the top-of-cliff western side, and existing trails on the eastern side.

This short connection would enable point-to-point and return walking journeys between the two popular holiday townships. It would also enable the completion of the proposed Trail#3 multiday, multi activity loop from Lakes Entrance to Nowa Nowa to Lake Tyers Beach and back to Lakes Entrance on foot in all weather and tides.

It is noted that the notion of creating a trail that links Lakes Entrance and Lake Tyers Beach has been suggested outside of this feasibility project, for community and visitor benefit.

The link would hinge on the ability to create a route from Red Bluff Beach (east side) over the Red Bluff Headland via clifftop hinterland, and then access the beach via a safe and sustainable stairway. **This walking link is possible without any trail build via a walk *around* Red Bluff rocks, however this is only safe and practical at low to mid tide (max).

Trails already exist, both formally and informally, atop the cliffs to the west of Red Bluff. New trail build would only require 500m-600m of new trail plus a set of stairs dropping approximately 40m over a 20m distance.

The preferred location has been identified, with two trail alignment options linking into existing trails going east towards and linking all the way to Lake Tyers Beach. Further, it is noted that site inspections revealed informal (little used) trails and flagging tape in the area identified as the best connection corridor, and a set of informal stairs and handrail poles discovered in the preferred location for a set of stairs required to enable beach access from atop the cliff. Figure 11 provides the map-based description.

REQUIREMENTS: new trail build, inclusive of stairs, approximately 500-600m, allowing access to western side of Red Bluff. Potential trail re-alignments.

Figure 13. Red Bluff Traverse



Figure 14. Photos showing Red Bluff and terrain for the new build trail including evidence of informal trails



3.1.5 Other significant trail upgrade requirements

Several additional priority trail upgrades are recommended prior to launch subject to Gunaikurnai business development priorities aligning with the details of this trail.

Latrobe Riverside Ride (Trail#4)

Trail review and selected resurfacing / upgrade along sections of ride route extending from Port of Sale to Heart Morass Wetlands, including Flooding Creek section (fair quality – review for consistency (5km)). **Most of this ride route is on existing dirt shared use (maintenance only) track in good condition.*

Potential extension of trail (new build required) beyond current suggested start/finish node further east to car park and boat ramp at Levee Track (2km) Not low-lying land regularly inundated, likely require boardwalk style trail for up to 500-1000m of section.

REQUIREMENTS: Requirement for trail upgrade estimated at up to 5km plus review for new trail build potentially 2km. New boat launch / jetty x 2 required for paddle/boat transfer visitors and walk trail links from watercraft legs.

Figure 15. Trail Improvements Latrobe River – Trail #4 Ride Route Heart Morass-Sale – note – these are subject to Gunaikurnai strategic planning and business development processes currently underway (July 2021 – which may result in amendments to the details in this)



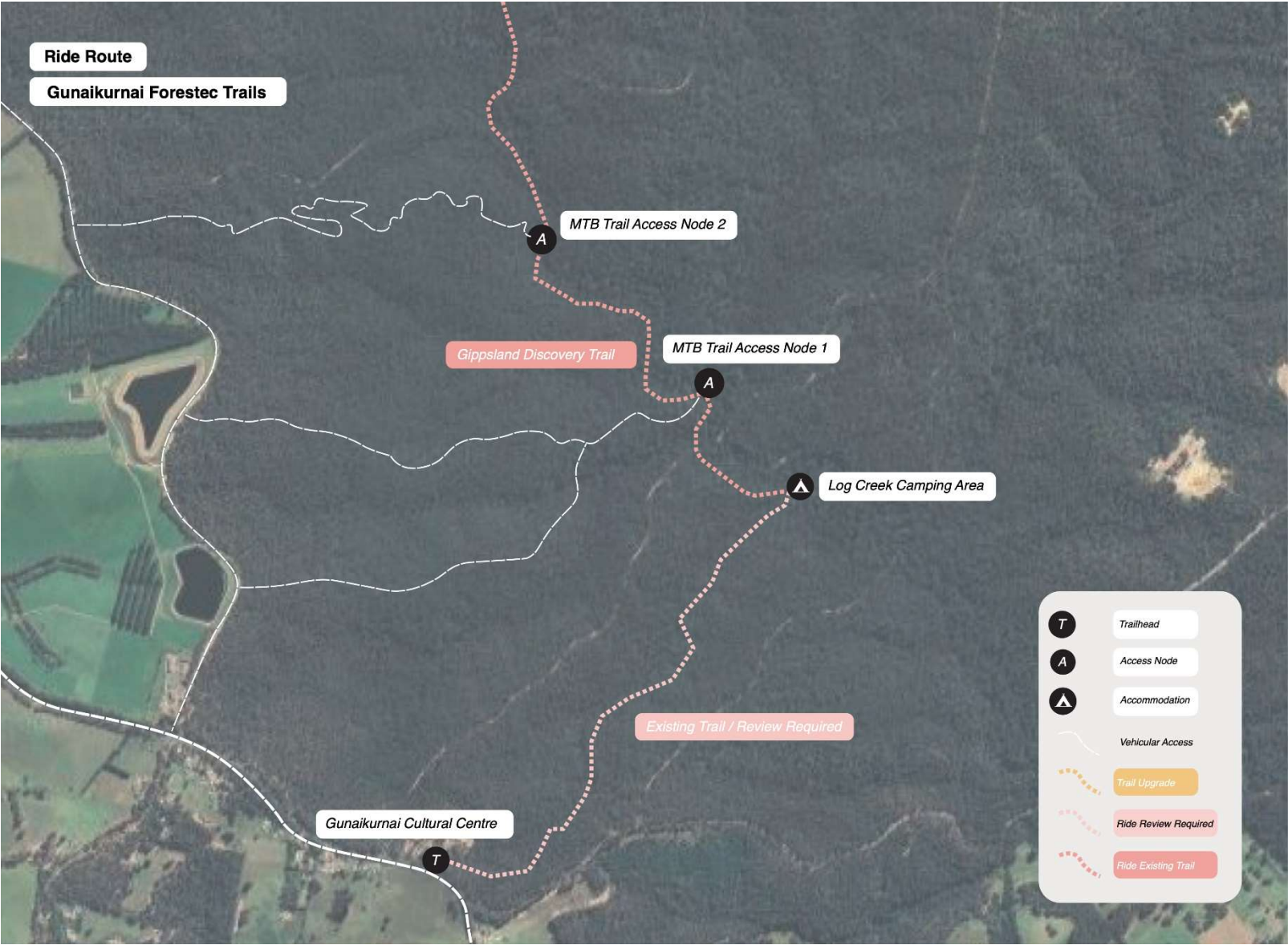
3.1.6 Gunaikurnai Culture and Visitor Interpretation Centre to Gippsland Discovery Trail

Access ride route (Trail#3)

The first section of the ride segment for Trail #4 gives riders the option to use technical riding trails within the existing MTB singletrack (Colquhoun MTB Trails) or a route along the existing Limestone Box Forest Track, the latter requiring investigations as to suitability for non-technical cycling.

REQUIREMENTS: Potential requirement for trail upgrade of approximately 2.2km (trail unsurveyed) to match IMBA Green standard trail (non-technical).

Figure 16. Gunaikurnai Forestec Trails – Trail #3



3.2 ACCOMMODATION AND SERVICE LEVELS (BASE, MID AND PREMIUM)

The Gippsland Lakes experience lends itself to an offering with a diversity of accommodation options for visitors to choose their own adventure.

Accommodation on trail or transfers to nearby towns can be planned for each day to access a greater variety of commercial accommodation options available in region.

Pre booking experiences with strong pre-trip information and package options should make it clear to the visitor the range of accommodation on offer characterised by style, size, budget, and suitability (i.e. family friendly, bike friendly).

Walkers can opt to pay for the Three Capes Track in Tasmania through the Parks and Wildlife Service for a moderate fee that includes hut-based accommodation. An alternative exists for them to pay more for a private guided trip in small groups with higher end accommodation, and catering included along with guides.

There are several accommodation options based on the potential management model ultimately adopted for the trail experiences. The model(s) would each then adopt selected itineraries mostly described earlier in this section, although they may be altered for commercial reasons once the operator(s) and the model are confirmed. It is noted that both supported and self-supported travellers will be able to undertake the four designed itineraries and/or versions of prior to the establishment of planned custom eco-accommodation projects.

The following models and options are considered below.

3.2.1 Public private partnership model (assuming public land is required for the accommodation)

- pursuing establishment of eco tents or eco-cabins at Nyerimilang Homestead (see figure 17 below) – private sector site lease on public land [Trail#1]

- pursuing establishment of eco tents or eco-cabins at nearby Ocean Grange – private sector site lease on public land [Trail#1,3] and/or
- pursuing establishment of eco tents or eco-cabins at Rotamah Island or Sperm Whale Head (Emu Bight or Pt Wilson, location TBC) – Gunaikurnai/private sector site lease on public land (see Figure 16 below)
- pursuing establishment of eco tents or eco-cabins at north-east arm of Lake Tyers/Boggy Creek (i.e. Camerons Arm and/or Glasshouse) – private sector site lease on public land

3.2.2 Private sector off track accommodation model (assuming private land is available for the accommodation options)

- recommend available accommodation to consumers at Fraser Island, Ocean Grange, Metung, Paynesville/Eagle Point, Loch Sport, Nowa Nowa, Lake Tyers Beach, Lakes Entrance *transfers required for some.
- potential pre and post trip accommodation at Nunduk Spa Retreat, Sale, Seacombe and/or Metung wellbeing resort
- various commercial campsites (holiday parks) at Lakes Entrance, Paynesville, Eagle Point, Loch Sport, Nowa Nowa, Lake Tyers Beach.

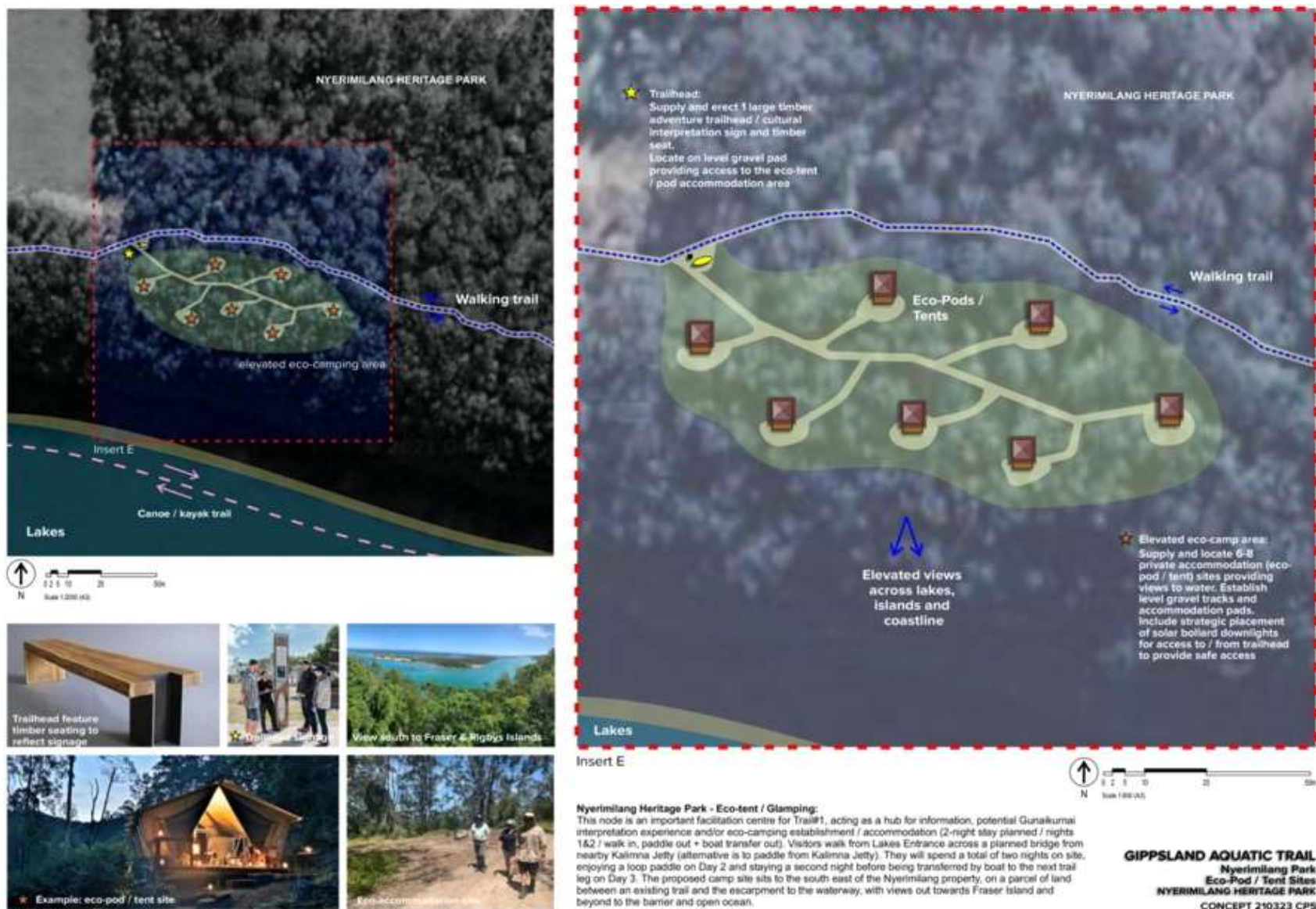
3.2.3 Free independent camping model

- established public campsites at Bunga Arm (numerous including, Steamers Landing), Emu Bight (Sperm Whale Head), Gippsland Discovery Trail, Red Bluff (Loch Sport), Camerons Arm, Ironbark, Trident, or Glasshouse.

3.2.4 Gunaikurnai management model

- potential for partnership or operation of the public private partnership model and/or eco accommodation at Bunga Arm/ Steamers Landing, Emu Bight or Pt Wilson on Sperm Whale Head and/or Rotamah Island, along the Boggy Creek arm of Lake Tyers (Camerons Arm, Ironbark, Trident, or Glasshouse).

Figure 17. Potential Nyerimilang accommodation



“These images are mock up only for the purposes of the Business Case. Detailed design will be required to meet Parks Victoria and Gunaikurnai standards”

Figure 18. Rotamah Island potential accommodation options



“These images are mock up only for the purposes of the Business Case. Detailed design will be required to meet Parks Victoria and Gunaikurnai standards”

3.3 VISITOR NODES / TRAIL HEAD – REQUIREMENTS

3.3.1 Gunaikurnai Gallery and Café – Forestec - (VIC / cultural gateway)

This centre will act as a ‘gateway’ introduction and welcome to country for the serviced options and curated experiences and may be also available for the self-service options on offer, with visitors welcomed to an interpretive facility that captures the cultural, environmental and historical significance of the landscapes and waterways they are about to explore.

REQUIREMENTS: Gunaikurnai cultural information display / experiences planned; take-away trip planning information in situ.

3.3.2 Lakes Entrance (trailhead departure)

This node is the major trailhead for Trail#1, acting as a hub for information, and trip planning for the departure point. The trail can be a walking departure, alternatively a paddling departure or boat transfer departure.

REQUIREMENTS: Mapboards, interpretation, wayfinding, seating.

Figure 19. Lakes Entrance Concept Drawings of the Trail Head



“These images are mock up only for the purposes of the Business Case. Detailed design will be required to meet Parks Victoria and Gunaikurnai standards”

Figure 20. Lakes Entrance departure point mock-up



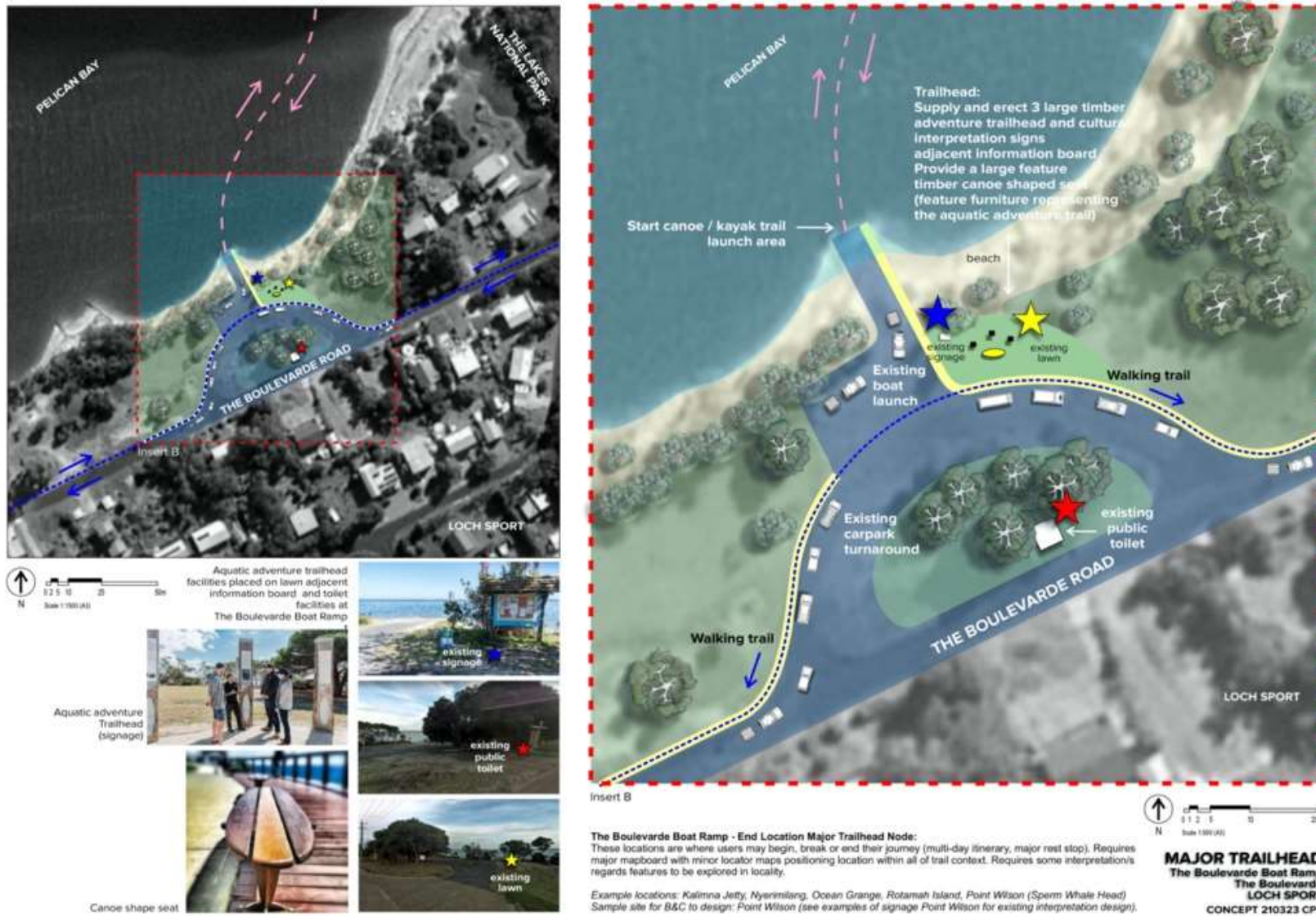
"These images are mock up only for the purposes of the Business Case. Detailed design will be required to meet Parks Victoria and Gunaikurnai standards"

3.3.3 Nyerimilang Heritage Park (nature/culture/accommodation)

This node is an important facilitation centre for Trail#1, acting as a hub for information, potential Gunaikurnai interpretation experience and/or eco-camping establishment / accommodation (2-night stay planned).

REQUIREMENTS: Interpretation / experience design; establishment of eco-camping or other accommodation.

Figure 21. Major trailhead node



“These images are mock up only for the purposes of the Business Case. Detailed design will be required to meet Parks Victoria and Gunaikurnai standards”

3.3.4 Loch Sport (trailhead departure/arrival)

This node is the major trailhead for departure-return Trail#2 acting as a hub for information, and trip planning/map boards for the departure point. Users can be walking (departure/arrival), alternatively paddling (departure/arrival), bike departure or boat transfer departure/arrival. It is also the primary terminus for Signature Trail#1.

REQUIREMENTS: Mapboards, interpretation, wayfinding, seating.

Figure 22. Loch sport drawing of trail head / conclusion to the trail



“These images are mock up only for the purposes of the Business Case. Detailed design will be required to meet Parks Victoria and Gunaikurnai standards”

3.3.5 Rotamah Island (interpretation / accommodation potential)

Stop node for visitors exploring Rotamah Island, arriving by foot, kayak or boat. Potential for significant Gunaikurnai cultural interpretation / experience based from homestead/s. Potential for eco-camp or homestead upgrades to lodge accommodation (long term).

REQUIREMENTS: interpretation signage / experience development; feasibility into accommodation via either eco-camp or repurposing of island homesteads.

Figure 23. Rotamah Island Concepts - brave and curious 2021



“These images are mock up only for the purposes of the Business Case. Detailed design will be required to meet Parks Victoria and Gunaikurnai standards”

3.3.6 ALTERNATIVE OPTION: Ocean Grange (accommodation/activity)

Ocean Grange could act as an alternative option to Rotamah Island for overnight accommodation and as a potential activity node for Trails#1 and #3. Potential exists to establish major lodge-style accommodation (NB: this style of accommodation would be predicated on the availability of existing accommodation / buildings, which are limited in supply at that location) and/or an eco-camp nearby to service Aquatic Trail users.

There is also potential to add Stand Up Paddleboard equipment / rental for optional add-on activity.

REQUIREMENTS: Investigation of potential siting and feasibility of eco-camp site and Ocean Grange (including delivery of kayaks to Bunga Arm put in for kayak leg); docking facilities suitable for kayak and/or boat transfer.

3.3.7 Sperm Whale Head including Point Wilson (nature/interpretation)

A midway stopping point for kayak and/or boat transfer users for two of the five trails, this is a major node for activity transition (paddle or boat>walk>paddle or boat); a potential major site for Gunaikurnai cultural interpretation; and rest/lunch stop. It is already well facilitated with picnic, toilet, jetty and signage infrastructure. It is a potential site for eco-camp accommodation as an alternative to Rotamah Island and/or Ocean Grange (due to the serviceability of the location by road and the outstanding location – noting the current management plan prescribes this as a day use site). There is potential for cycling return leg (alternative to paddle or boat transfer on southern trails existing. Investigations required.

REQUIREMENTS: investigations into eco-camping feasibility and site. Potential trail upgrade for cycling.

3.3.8 Raymond Island (activity/nature)

A feature of Trail#2, Raymond Island already has an existing 'koala trail' walk, and good jetty / water landing facilities. Proposal seeks to expand the walk / ride potential of trails.

REQUIREMENTS: trail audit and feasibility of trail extensions, upgrades, wayfinding.

3.3.9 Metung Hot Springs

Metung forms a component of the signature trail (Trail #1). The new developments occurring at Metung Hot Springs present a significant opportunity to build a collaborative arrangement with the owners. Potential add on experiences or even accommodation once built will present guest with valuable product and experience options.

REQUIREMENTS: engagement with Metung Hot Springs owners about product packaging with the Trail

3.3.10 Nunduk Spa Retreat (accommodation)

Attached to Trail#4 from the Port of Sale, this proposed spa resort represents the ideal luxury overnight stay for visitors exploring the wetlands. Accessed by boat transfer from Heart Morass Wetlands, it is a potential signature element of the itinerary.

REQUIREMENTS: engagement with accommodation operator and agreements for facilitation. Will require boat transfer operation either third party or operated by Spa. Requires boat jetty on Lake Wellington attached to Spa access.

3.3.11 Boat jetties & kayak ramps

Most of the trails identified for further feasibility studies have existing, high quality boating facilities in the form of piers, docks, jetties, landings and ramps, previously identified through field work and desktop assessments. Some kayak-only docking points do not require infrastructure when located at safe, shallow sand shore access points.

Recognising the variable wind and water level conditions that can be experienced in the lake system, careful design is required.

Potential new docking infrastructure will be required at:

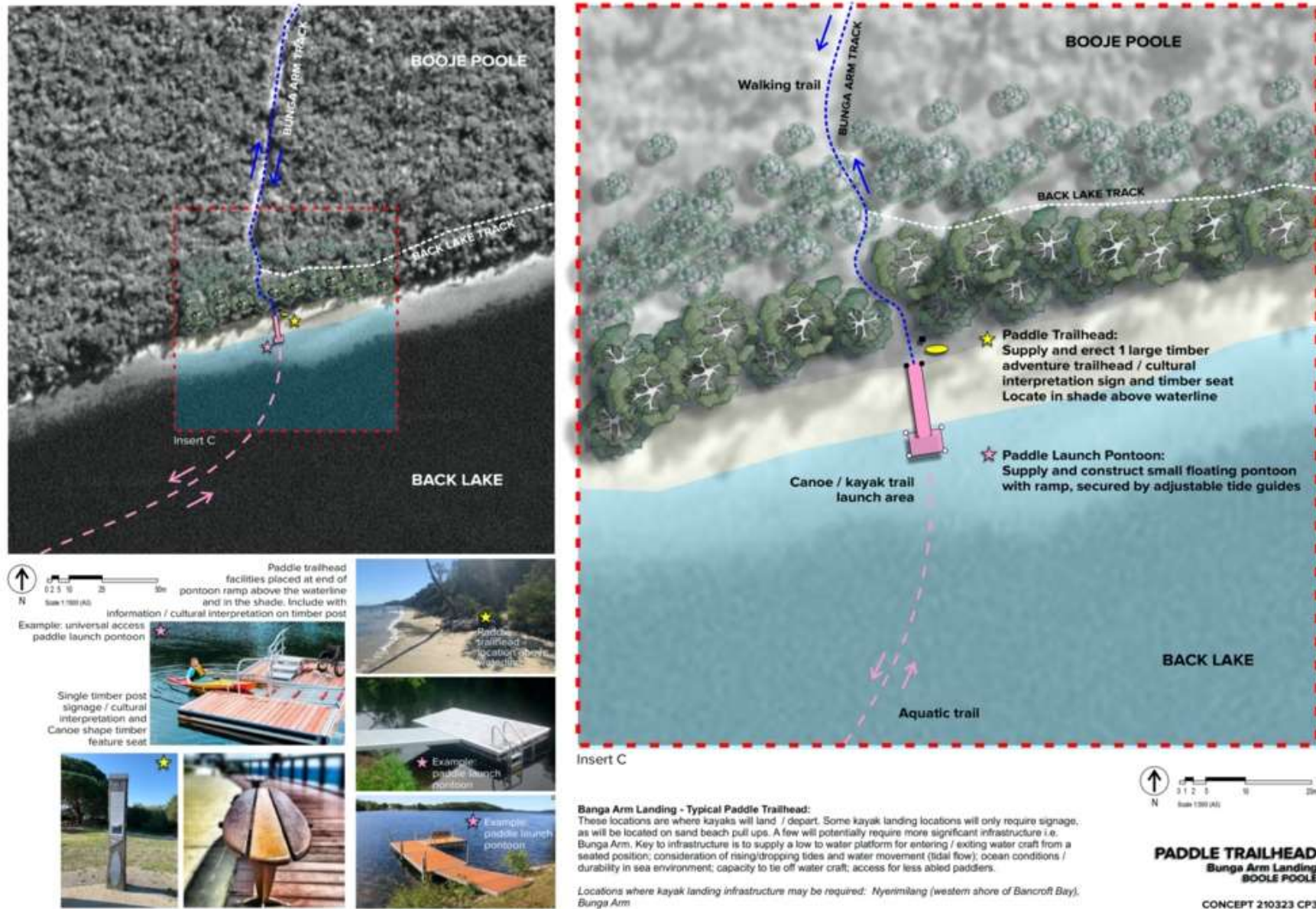
- Bunga Arm (likely shallow sand beach landing/put in)
- Camerons Arm (Trail#3 – already suggested in Lake Tyers Camping Plan Strategy)
- Emu Bight Camp (likely shallow sand beach landing/put in)
- Heart Morass / Latrobe River (requires jetty for boat transfers / kayak)
- Bull Bay (Nunduk Spa) (requires boat jetty for boat transfers)
- Latrobe / Thompson River confluence – east riverbank (potential boat/kayak landing if point to point walk segment required)

All other put ins/docking sites have existing adequate infrastructure for boats and kayaks.

Figure 24. Bunga arm concept drawingspotential kayak launching facilities



Figure 25. Bunga Arm Landing Boole Poole concept drawings

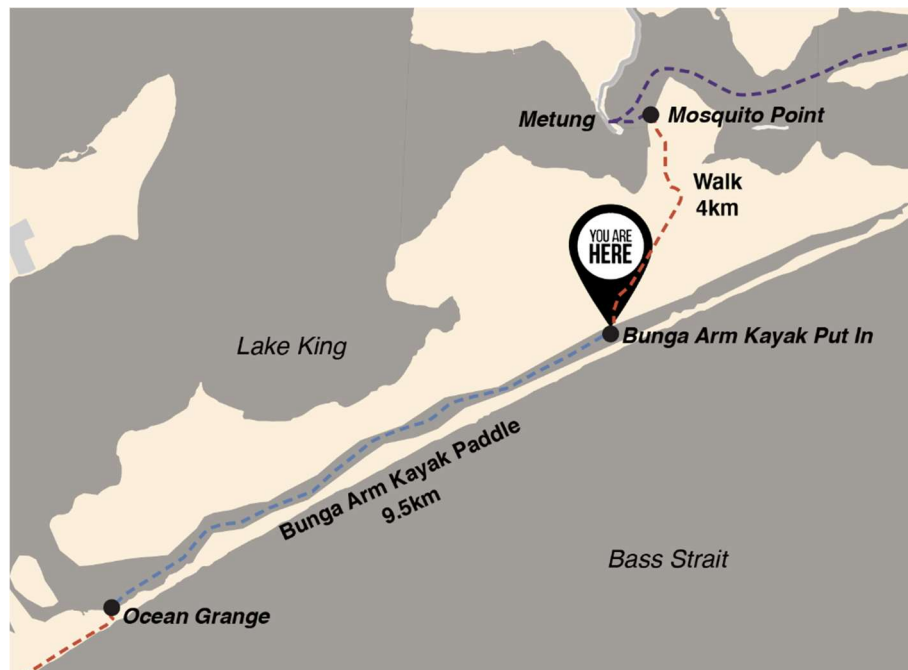


3.4 SIGNAGE – INTERPRETATION & WAYFINDING

In general, trailhead locations (where visitors begin their trail journey) are set amidst cluttered locations (townships, car parks) that often already have existing visitor information in place. This combined with the fact that trail itineraries are segmented and will require ‘digital navigation’ of some form, means there is no requirement for major trailhead map boards or wayfinding specific to the aquatic trails.

Interpretation will be the major focus of any signage infrastructure development. It would aim to facilitate the Aquatic Trails experience with quality interpretation of culture, landscape and history, while also being relevant to other visitors not necessarily engaging in the Aquatic Trails itineraries. This interpretive signage would feature Gippsland Aquatic Trails branding and references to broaden exposure of the aquatic experiences on offer.

Figure 26. Wayfinding sign example



3.4.1 Wayfinding will be:

Digital – via mapping applications using GPX routes available for public download from website/s, useable across mapping apps and platforms (i.e. AllTrails, Gaia, Trailforks, GoogleMaps, Avenza, GPS-enabled handhelds and watches). Outputs to facilitate this will be determined by full trail audits to produce clean / accurate GPX/KML mapping files, along with base set of online reference maps created and made public (i.e. AllTrails + GoogleMaps + Avenza).

Digital – website – central resource to house all mapping, downloads and guides. Inclusive of inspirational content and directional/faciliatory, service and accommodation operators. *NB: this should include full safety section advising those undertaking trail/s of requirements to safely undertake each trail – especially critical for all water-based legs of itineraries and for independent users.*

Physical: paper maps, guides and brochures available at major information nodes (VICs, cultural interpretation centres and via downloads for printout) in addition to the material which may be given to private clients on the premium serviced options.

In situ / location: consideration may be given to inexpensive brand icon markers and Q-codes (where network coverage allows) placed at relevant sites along routes (i.e., at kayak put-in/docking sites or added to existing trailhead map boards) to ‘remind’ visitors they are on a ‘brand’ trail. Mapboards may be created for a major welcome node such as Gunaikurnai Forestec Centre.

3.4.2 Interpretation will be:

- **Gunaikurnai Forestec Centre** – major map boards and interpretation for all Gippsland Aquatic Trails, serving as a planning and inspiration board for intending and prospective users. Potential separate map board focusing on Trail #4 mapping (as acts as trailhead for this itinerary). NB: this should include full safety board advising those undertaking trail/s of requirements to safely undertake each trail – especially critical for all water-based legs of itineraries and for independent users.
- **Nowa Nowa** – review of current signage and visitor experience interpretation. Potential to refresh the lake entry and information using Aquatic Trail implementation as impetus. Include repeat of Trail 5 map board.
- **Bung Yarnda / Lake Tyers** - review of current signage and visitor experience interpretation. Potential to refresh, using Aquatic Trail implementation as the catalyst. Cultural/Gunaikurnai cultural and historical focus.
- **Kalimna Jetty** – potential secondary map board focusing on brand and Trail 1 map board focus.
- **Rotamah Island Homestead** – potential secondary map board focusing on brand and Trail 1+3 map board focus, inclusive of nearby waterway and island activity zone mapping and cultural touchpoints.
- **Ocean Grange** – potential secondary map board focusing on brand and Trail 1+3, inclusive of nearby waterway and island activity zone mapping and cultural touchpoints.
- **Port of Sale** – potential map board and setting for personal story telling / regional orientation.
- **Sperm Whale Head / Pt Wilson** - review of current signage and visitor experience interpretation. Potential to refresh/add, using Aquatic Trail implementation as impetus. Potential to confuse non-aquatic trail visitors.
- **Eagle Point Walk / Silt Jetties / Raymond Island / Loch Sport** – consideration given to addition of branding on current location trail/park signage and/or review existing signage for refresh, including Aquatic Trail element/brand.
- **Q-Codes (various sites)** – sensitive placement of prominent Q-codes on existing signage / infrastructure, alongside Aquatic Trail brand, to identify a feature of interest sited in mobile coverage zone, allowing visitors to scan and learn about environmental, cultural, or historical points of interest.

3.5 SERVICES

3.5.1 Gunaikurnai visitor information centre / interpretation centre and welcome to country

A centralised Information Centre will act as the 'gateway' node welcoming all visitors to the Aquatic Trail experience, with service information, facilitation and interpretation activity pertinent to Gunaikurnai overlays of the trail experience ahead.

The centre will also act as physical trailhead for Trail#3 (ride trail leaving from location). It will act a stop-and-go trailhead for other trails (#1, #2, #4) users either as part of a guided itinerary (groups transported to the centre at beginning of tour) or as a component of self-supported visitation prior to starting a trail (users stop at centre using own transport prior to transiting to start of their chosen aquatic trail journey).

3.5.2 Water transfers

Water transfers are critical to Trails #1 and #4 and optional for Trails#2 and #3 pending style of journey.

A boat transfer is required to link some of the on-water legs of Trail # 1 including Nyerimilang to Metung/Mosquito Point, and - depending on activity selections per leg on journey - to transport bikes from Bunga Arm to Ocean Grange/Rotamah and on to Point Wilson. Metung Hot Springs may also be included in an itinerary.

Trail#4 requires boat transfers from Heart Morass Lake Wellington (and Nunduk Spa if developed). Optional boat transfers may include parts or all of leg/s along Latrobe River. Other opportunities for Gunaikurnai are being explored at the time of preparation of this report.

The flexible nature of the designed experiences across all trails requires a capacity for boat transfers for all trails, and may include a need for bike carrying capacity, luggage and equipment drop off/pick-ups, emergency pick-ups, and kayak transfer capacity.

The boat transfer craft would ideally contain the ability to take 15 or so passengers and guides, with luggage and the potential for transferring mountain bikes and kayaks.

3.5.3 Land transfers

Trailheads for the Aquatic Trail experiences are located across the Gippsland Lakes region, requiring land transfer options for both guided/supported and self-supported visitors. This includes:

- Transfers to / from Gunaikurnai Visitor Information & Interpretation Centre
- Transfers to / from Loch Sport
- Transfers to/from Port of Sale
- Transfers to / from any selected midway stop/start locations i.e. Metung.

Depending on the itinerary and model chosen by the visitor – the land transfer could be in the form of private transport (min bus), public transport (variable and not as reliable in terms of the schedules) or private transport.

3.5.4 Commercial tour operators

Commercial operators will offer integrated adventure packages of varying degrees of servicing according to customer demand and the visitor experience model adopted by the operator. These will be operated by qualified activity guides (bike, paddle, walk; potential all trails) and extend to suggested itineraries, inclusive offerings (i.e., catering and accommodation) and selected offerings (i.e., transfers only, hire only etc)

3.5.5 Gunaikurnai guides / storytelling

Potential sites for Gunaikurnai cultural interpretation include: Gunaikurnai Forestec Centre, Nowa Nowa, Bung Yarnda / Lake Tyers Mission, Nyerimilang, Rotamah Island, Sperm Whale Head/Pt Wilson; Sale Common Wetlands; Eagle Point. Additionally, the Trail 4 may incorporate a significant Gunaikurnai cultural immersion opportunity dependent upon planning currently underway.

Sites may benefit from the offering of in person interpretation by Gunaikurnai guides and experiences designed to immerse visitors in Gunaikurnai culture and

history. This service should be operated and managed under the auspices of the Gunaikurnai Information and Interpretation Centre at Forestec and be integrated into all service offering promotions.

3.5.6 Equipment hire, sales, service

Self-sufficient or semi-self-sufficient visitors may require hire equipment to undertake their journey and/or access equipment sales or servicing.

Hire equipment, accessory sales and service capacity would be required commercially in towns, or for private operators, be made available for:

- Kayak and other paddle equipment
- Bike hire and other cycling equipment.

3.5.7 Hospitality

Trail visitors will require hospitality services supplied throughout their stay, which for most visitors will be multi-day. Services required include:

- Accommodation – range of styles and budgets; on trail and off trail
- Food, beverage – eat in, take away
- Land transfer options (bike and kayak friendly; guests and equipment).

3.5.8 Other activities & attractions

Activities and attractions that extend a visitor's experience may include:

- Other outdoor activity operators i.e. Stand Up Paddle Board rental (Trails #1,2,3,4), fishing, birdwatching
- MTB trails (Colquhoun and Nowa Nowa trail networks)
- Sculpture Walk (Nowa Nowa), art galleries
- Boat tours (i.e., The Entrance seal and dolphin tours, Rubeena Port of Sale tours)
- Scenic flights
- Historical and cultural (i.e. museums, art galleries)
- Culinary attractions (i.e. wineries, farm gates, markets).

3.5.9 Events

The proposed Aquatic Trail product could be a foundation for establishing new events focused on the experiences, activities and environments featured. This may include a newly designed adventure race, multisport, festival, trail run, cycling, or paddling events in competitive or non-competitive (challenge/recreation) formats.

Equally, existing events in the region represent added-value attractions of relevance to the Aquatic Trail product including:

- Gippsland Lakes Paddle Challenge, Sale – Lakes Entrance
- X-marathon, Paynesville
- Race the Rubeena, Sale
- Festival of the Lakes.

Non-competitive events are also important to assist in promoting and using the trail-based infrastructure. These could include such events as photographing, nature-based events, community events and art being used as a trail activation / destination activation theme.

4 Planning Considerations

4.1 PLANNING CONTEXT

A wide variety of State policy, legislation, strategy, planning and programs intersect with the development, management, maintenance and planning of trails in Gippsland and Victoria. The section below provides a summary of both relevant legislation and plans that will need to be considered during the development of the proposed aquatic trail.

Given the amount of new trail to be constructed has been minimised during the planning phases of this business case and feasibility study, much of the planning will need to consider 'policy' as much as it does regulation and acts.

4.1.1 Land Tenure

The proposed route of the trail(s) and associated facilities such as trail heads, toilets, paddling launch places and infrastructure will be located across a wide spectrum of land tenures, many of which have different agencies managing them. This issue has been raised before in the context of development in the Gippsland Lakes environment, and in many respects, it is no different to the West Coast, where the Victoria Government recently introduced the Great Ocean Road Coast and Parks Authority with the objective of having one agency manage the complex interactions between use, conservation and community across multiple tenures. The GORCCA has been in existence for only a short period of time, and it is felt to be too early to evaluate whether the model will be a success or not. It is worth considering in the future for the Gippsland Lakes environs to aid in the simplification of the planning processes across the multi-tenure environment.



The following tenures of land are likely to be used and their respective managers noted.

Table 1. Land Tenure and Managing Agency

TENURE	MANAGER	PRIMARY PURPOSE AND PLANNING
National Park – The Lakes National Park	Parks Victoria in partnership with Gunaikurnai Land and Waters Aboriginal Corporation (GLaWAC)	The Lakes National Park is managed under the National Parks Act and is also one of 10 parks and reserves where Aboriginal Title has been provided to the Gunaikurnai people. Management directions are provided through the Gunaikurnai and Victorian Government Joint Management Plan – The Lakes National Park and Gippsland Lakes Coastal Park – Tatungalong Country. Much of the park is zoned as Conservation Zone, with the Rotamah Island area being zoned Recreational Development Zone, allowing for potential re-development of the existing homestead site.
Gippsland Lakes Coastal Park	Parks Victoria in partnership with Gunaikurnai Land and Waters Aboriginal Corporation (GLaWAC)	The Gippsland Lakes Coastal Park is managed under the National Parks Act and is also one of 10 parks and reserves where Aboriginal Title has been provided to the Gunaikurnai people. Management directions are provided through the Gunaikurnai and Victorian Government Joint Management Plan – The Lakes National Park and Gippsland Lakes Coastal Park – Tatungalong Country.
Nyerimilang	Parks Victoria	Nyerimilang Homestead is managed as part of the Nyerimilang Park Gippsland Lakes Reserve (GLR) and also the Bancroft Bay – Kalimna GLR. It is not one of the scheduled parks that Gunaikurnai has Aboriginal Title for, but it is within the Gunaikurnai Recognition and Settlement Agreement area. The site is generally managed for visitors and protection of the heritage of the site and subject to the Crown Lands (Reserves) Act.
Private Land	Individual Owners	Private property is owned with free title but is generally subject to planning consideration which for the most part are managed through the relevant Shire including East Gippsland and Wellington as it relates to this potential development. Private land at Ocean Grange is a case in point.
Gippsland Lakes	DELWP	Although it can be confusing, the lake floor is generally considered to be Crown Land and hence subject to the provision of the Crown Lands (Reserves) Act. Various agencies have a role in planning including the waterways management authority (for the most part Gippsland Ports or Parks Victoria) planning for inundation (Catchment Management Authority).
Coastal Foreshore Reserves	DELWP or as delegated to a Committee of Management	Much of the Gippsland Lakes has a foreshore subject to the Crown Lands (Reserves) Act, designed to buffer private and provide a protective barrier for conservation. Some of the parcels are managed by DELWP, some managed by a Committee of Management. The Committee of Management can include Parks Victoria, the Shire Councils, Gippsland Ports, or other entities approved by the Minister for Environment.

4.1.2 Legislation

The *Local Government Act 1989* and associated Regulations provide the authority for Local Government in Victoria to operate. It also defines the functions and purposes of local government. Within this context, LGAs can undertake planning, provide services and administer businesses in line with the provisions of other Acts in Victoria. Planning approvals fall within the accountability of the Shire of East Gippsland and the Shire of Wellington for much of the requirements of this proposal. The State Government can assume the role of planning authority for large and complex projects.

The *National Parks Act 1975* provides for the management of the State's National Parks and various classes of reserves. The Act and its Regulations prescribe the permitted use and regulation of activity in Parks, ensuring the protection of individual park values while providing for safe and enjoyable use. The NP Act and associated regulations provide the planning framework for much of the proposed development.

The *Forests Act 1958* sets the management framework for the State Forest management in Gippsland. The Act includes firefighting and fire management guidance and for recreation activities as well as commercial management of forests.

The *Crown Land (Reserves) Act 1978* and the *Land Act 1958* provide the legislative framework for the management of Crown Land in Victoria. Specifically, they provide for regulations governing use and the provision to create Committee of Management, relevant to Councils for managing rail trails and other areas of Crown Land for recreation or tourism.

Marine and Coastal Act 2018. All use, development or works on marine and coastal Crown land by any party including committees of management and local government requires consent under the Marine and Coastal Act 2018.

The Aboriginal Heritage Act 2006 and Regulations 2018. Prescribes how to manage and preserve Aboriginal Heritage including the need for Cultural Heritage Management Plans (CHMPs).

4.1.3 Management Plans for Areas Reserved under the National Parks Act.

Sections 4.1.1 provides an overview of the general nature of the land tenure and section 4.1.2 provides an overview of the managing authorities accountable for the various parcels of land the trail may intersect with.

The land management plans for the parcels of land requiring them that the proposed trail may intersect with are important in providing the direction for management. At times, where the proposal may be at odds with the strategic direction of the plan – then an amendment can be made to the plan following community consultation on the proposal. The main plans affecting the likely endorsement of the process are the Gunaikurnai and Victorian Government Joint Management Plan – The Lakes National Park and Gippsland Lakes Coastal Park – Tatungalong Country. The overall strategic document also provides the intent for management.

The main planning considerations here are the zones, and the intent for joint management, recognising the Gunaikurnai people as the traditional owners of the land. The joint management plan states that the management zones are described as per below.

Table 2. Description of Land Management Zones in the Gippsland Lakes Coastal Park and the Lakes National Park (NOTE – only those zones that potentially impact the proposal are discussed below) – taken from the Joint Management Plan (2018).

ZONE	DESCRIPTION AND PURPOSE
Conservation Zone	Areas of high natural value including land, water and ecological values. Recreation and nature-based tourism are allowed subject to close management to ensure minimal impact and disturbance of natural values. Low impact recreation activities are allowed; limited visitor facilities are provided, and are dispersed and small-scale.
Conservation and Recreation Zone	Areas where the management emphasis is on protection of land, water ecological and cultural values while encouraging dispersed recreation and nature-based tourism. Low-impact recreation activities are allowed; dispersed small-scale facilities are provided, without significant impact on natural processes and landscape character
Recreation Development Zone	Relatively small areas with a high level of recreation or visitor use, Larger-scale visitor facilities are located within this zone, which is applied to the Rotamah Island homestead and adjacent area.
Cultural Values Overlay (future)	Areas where the extent, nature or significance of Aboriginal cultural heritage is high. Specific protections and restrictions on use and activities may be applied. (This zone has been applied in the event that cultural values locations requiring

Maps of these zones are provided in Appendix C.

4.1.4 Bushfire Overlay

The State of Victoria has a planning instrument called the Bushfire Management Overlay. A planning permit is required for some types of development to ensure bushfire risk is considered and bushfire protection measures are in place. This may be required for the potential accommodation zones near Nyerimilang and near Rotamah Island.

4.1.5 Native Vegetation Removal

The guidelines for the removal, destruction or lopping of native vegetation in Victoria are incorporated into the Victorian Planning Provisions and all planning schemes. The provisions prescribe the importance of the three-step approach: 1. Avoid, 2. Minimise, and 3. Offset.

Offsets can be expensive for projects requiring larger scale vegetation removal and are best avoided. Applying the 3-step approach for this proposal would see in most cases avoidance being likely.

4.1.6 Cultural Heritage Management

The need for the protection of Aboriginal Heritage is prescribed and the need for Cultural Heritage Management Plans and who can undertake them are contained in the Act and Regs. Most National Parks and Coastal Reserves are described as areas of cultural heritage sensitivity.

4.2 LIKELY PLANNING ISSUES

This proposal has sought to utilise as far as practically possible existing trails and infrastructure, as well as using the water for the purposes of transport and as a significant part of the overall experience. Notwithstanding the intent, there are to be expected, several pieces of new infrastructure required to enable the proposal to succeed. In addition, the permitted activity needs to be allowed to occur.

This section looks into some of the possible planning issues and opportunities to overcome them.

Table 3. Possible Planning Issues to Overcome and Opportunities to do so.

ELEMENT	PLANNING CONSTRAINT	OPPORTUNITY
New Trails – Kalimna to Nyerimilang including the bridge over Maringa Creek.	- This is a significant piece of infrastructure that aims to complete the existing rock wall pathway from Lakes Entrance to Kalimna. - Coastal erosion and sea level rise are impacting the cliff structures above the water level and this proposed new trail may alleviate that. - Marine and Coastal Act Consent will be required in addition to a proponent being developed. - Engineering will be required to be approved for the structures. - Sea level rise will need to be considered.	The structure achieves several objectives: - Providing a barrier to erosion of the cliff face - Linking Nyerimilang to Kalimna and Lakes Entrance provides a very significant piece of community infrastructure that activates the Nyerimilang site for the benefit of many communities outside the scope of this report, and - Enables the proposal being considered in this study to utilise the walkway (along with other future opportunities).
Accommodation – Nyerimilang Reserve	- Applying for permission to lease some land from Parks Victoria and form the Nyerimilang Reserve would need to be able to satisfy some elements previously considered including cultural heritage assessments, protecting the nature of the homestead and site, etc. - Leasing provisions through Parks Victoria would apply.	- Utilise existing cleared or partially cleared areas away from the Homestead site. - Construct new micro systems for effluent, electricity provision and water storage. - Develop the accommodation hub as a sustainability model – also helping to attract customers in the target markets - Utilise existing ‘farm tracks’ to provide vehicle access through the back of the reserve avoiding disturbing current visitors - Seek a longer lease term to allow the initial costs to be amortised over 21 years - Construct the accommodation hub with fire and emergency front of mind with an evacuation hub close by in the paddocks or the water’s edge.
Accommodation Hub – Rotamah Island / Ocean Grange	- The provisions of the joint management plan consider Rotamah Island as a recreation development zone. - The homestead and surrounding areas are currently leased to RIBO (Rotamah Island Bird Observatory) but it is understood that opportunity may exist to take on the lease from the volunteer run organisation. - Gunaikurnai may have an interest in the homestead and surrounding sites.	- Redevelop the site allowing for general visitor use in addition to the proposed accommodation hub - Build a partnership model with Gunaikurnai in the development of the operation - Remove the problems of the Homestead to Parks Victoria and RIBO by leasing it as part of this development - Minimal vegetation clearance or other issues are foreseen. - The guidance principles for tourism leases in national parks would apply.

ELEMENT	PLANNING CONSTRAINT	OPPORTUNITY
	Ocean Grange presents a private property opportunity that is then subject to the Shire planning scheme.	
New Trail – Lakes National Park	- The management plan zoning does not encourage the development of new visitor facilities despite it being considered an important element of the experience upgrade. - Native vegetation offsets may be required in some areas where avoidance cannot be achieved adding to the cost.	- The plan does allow for small scale and limited visitor facilities. This may include the provision of new walking tracks. - Interpret the coastal vegetation and avoid disturbance where possible.
Various small infrastructure elements including kayak launching places	Marine and Coastal Management Act Consent may be required for some of the elements including some jetty infrastructure and some kayak launching points	Seek to use existing infrastructure wherever possible.

4.2.1 Tourism Leases in National Parks Guidance Note¹

Parks Victoria and DELWP have published a guidance note on the principles and procedures for considering a private investment that is small scale and appropriate inside a national park under a lease of up to 21 years.

The guidance note specifies the areas that are not suitable for the development of tourism leases. Neither of the 2 locations proposed for accommodation hubs fall into those areas deemed not suitable.

The guidance principles specified in the note align with the principles this proposal is trying to achieve:

- The proposed facility must be shown to be dependent on its unique location due to the nature of the site and its setting in a national park. A proposal that can be sited outside a national park would not progress
- Any tourism development in national parks must be located and designed to be compatible with protecting the natural and cultural values and features of the park. The purpose of the development must be consistent with the legislative objectives and purposes of national parks
- The development must provide an enhanced nature-based visitor experience and encourage visitors to appreciate and conserve the park
- Any tourism development must provide the greatest public benefit for the site considering any environmental, social and economic outcomes for the park and the broader region
- Development will not be allowed where it impacts on Aboriginal cultural and historic heritage. Where relevant the proponent must engage, involve and benefit Traditional Owners and local communities
- Public access to the site must be maintained and potential adverse impacts on use and enjoyment of the park by other park users must be minimised

- The government process for considering proposals will be consistent, transparent and appropriate to the nature and scale of the proposed development while protecting the intellectual property of the proponent, and
- Lease duration (up to 21 years) for a tourism development will be commensurate with the level and rate of return on investment, considering risk and capital and operating costs associated with the location and the nature of the development and competition policy principles.

The paper also spells out further consultation requirements.

These principles would at this stage of the process not rule out the proposal being considered, and in fact it has been designed to be an exemplar in sustainability and promoting the values of conservation and traditional owners.

¹ Tourism Leases in National Parks: Guidance Note. DELWP 2015

5 Market Assessment

5.1 SUMMARY

In summary, the walking and cycling markets both overseas and in Australia are growing, while guided and self-guided accommodated walks and rides are some of the fastest growing tourism products. Kayaking, too, is a growing market, bolstered by the ease of access to inexpensive paddling equipment via 'big box' outdoor retailers such as BCF and Anaconda.

Regionally, there is an existing market for nature-based activities including bushwalking, cycling and kayaking in Gippsland and considerable potential for new markets for the GLAT. Recent evidence has shown more people getting out into nature due to the recent COVID- 19 restrictions. This trend is likely to continue with more people interested in outdoor activities. There will likely be an acceleration of the recent trend amongst millennials, whereby they want to feel their major purchases are contributing to the greater good (e.g., environmental conservation, community livelihoods etc.).

More resilient, and predominantly younger travellers will probably be the first to return to remoter and more adventurous destinations - gradually and in limited numbers. More affluent walkers who often undertake high end walks overseas are likely to do them domestically whilst travel is restricted, or they feel safer at home. Adding the concept of serviced kayaking will also be attractive to this market and will be a compelling and distinctive offering for Gippsland.

There are many sites of cultural significance to the Gunaikurnai community located throughout the Gippsland Lakes region and of relevance to visitors experiencing the Gippsland Lakes Aquatic Trail/s. Many of these sites are easily

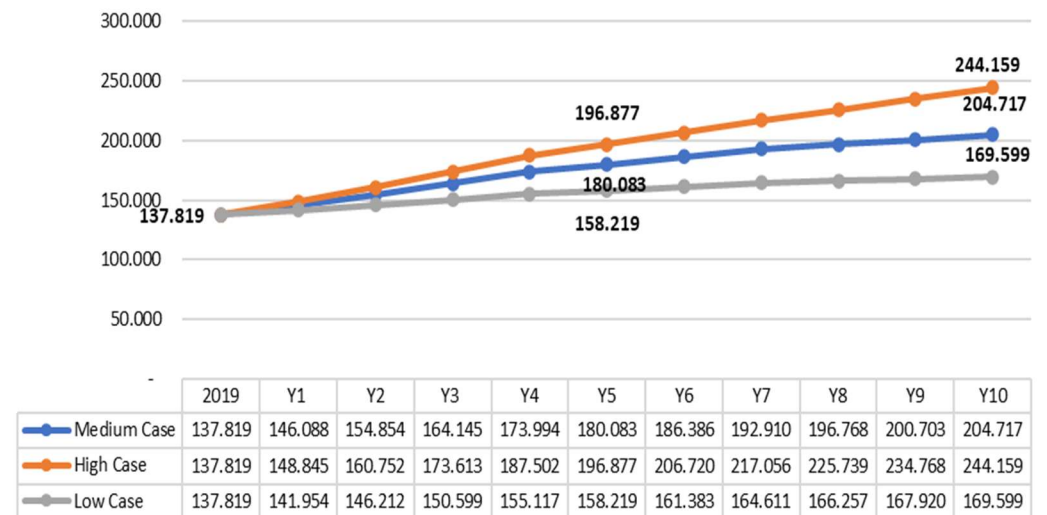
accessed. There exists opportunity to bring to the fore meaningful stories and interactive experiences central to these sites and the Gunaikurnai, magnifying the Trail's status as tourism drawcard, and tapping into the rise in demand for First Nation cultural interactions. This of course must be both approved by and able to be delivered by the Gunaikurnai people through GLAWAC.

Concurrently, there is an opportunity to strengthen the understanding of and connection to the Gunaikurnai amongst the broader Gippsland community.

Aligned to this opportunity is the development of tourism businesses and enterprises within GLAWAC. This also needs to be approved and prioritised by GLAWAC among its many other opportunities.

Further details on markets are provided in Appendix D.

Figure 27. Potential Visitor Market for the Gippsland Aquatic Trail ('000)



5.2 CORE MARKETS

This section describes the core markets available to the development of the lakes aquatic trail concepts. All markets are not mutually exclusive, with the opportunity to mix certain markets based on the flexible nature of the product being developed. For example, independent walkers and paddlers could share the trails with visitors undertaking the multi day premium supported experience while but using different accommodation and guiding options.

Table 4. Core Target markets - Gippsland Lakes Aquatic Trail

WALKER TYPE	NEEDS
Day walkers	- Distance: 20-minute walks up to 15–20 km day treks. - Demographic: Popular with almost all demographics and age groups, often caters for all levels of fitness and accessibility needs. Favoured by ‘Active Families’. - Expectations: Trailheads with clear signage, points of interest, visitor interpretation and trail marking (65% do not plan or research prior to a walk). Return loops in preference to one-way and return trails.
Independent overnight walkers and overnight walking groups	- Distance: Overnight stops spaced every 10–20 km (depending on gradient). - 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. - Expectations: Mix of grades (2-5) preferable, spend 1-3 nights. Provision of water, toilets, designated mid or high level camping areas, common shelters and separation from large groups (happy to share with other independent walkers). Shuttles for off trail accommodation. Will seek pre and post walk accommodation and experiences. - Example: The Three Capes Walk in Tasmania has catered well to this market, with the trail and facilities designed to suit. This is evidenced by increasing demand of walkers booking and undertaking this walk.
Supported overnight walkers	- Distance: Overnight stops / trailhead access spaced every 10 to 16 km (depending on gradient). - Demographic: Younger Adults, Women Travellers and Active 55+ groups. Seeking an experience where they don’t have to bring all their own gear at a mid-range level. - Expectations: Mix of gradients (2-5 grading) with some sense of adventure challenges. Walking with a guide or local tour operator. Seeking unique, iconic and ‘brag-able’ experiences. Comfortable tents (glamping) or roofed accommodation (cabins) separated from other users located within 1 km 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.
Fully facilitated/ supported walkers	- Distance: Overnight stops/trailhead access points spaced every 10 to 16 km with a mix of grades offered. - Demographic: High Value Travellers - Highest average spend of all walk markets, an average of \$2,360 per trip and average length of 4 nights stay (\$590 per day) ². - Expectations: Full commercial, seamless, all-inclusive high quality guided experience. Comfortable through to luxury roofed or tented accommodation separated from other users located within 1 km 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.

² Market review of current iconic trails with a 3-5 day length with quality accommodation options.

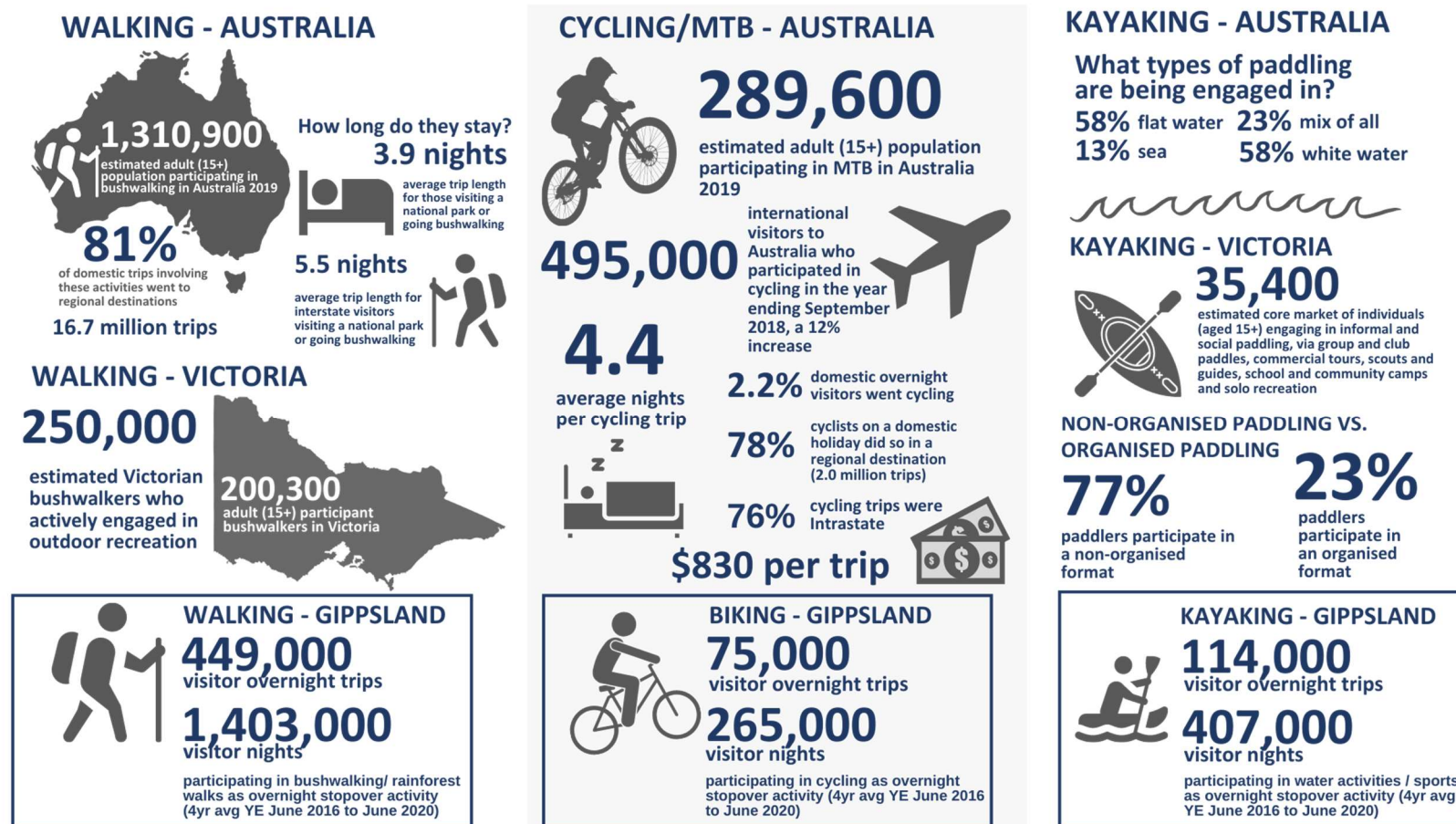
Table 5. Core Target Paddling markets for the Gippsland Lakes Aquatic Trail

PADDLER TYPE	NEEDS
Day paddlers – beginner to intermediate	• Distance: 1- 4 hour paddle; 3-12km • Demographic: Popular with almost all demographics and age groups, often caters for most levels of fitness and accessibility needs. Favoured by 'Active Families', 'couples', 'beginners' across sit-on-top and closed-in (i.e., sea kayak) paddle craft, low skill to intermediate skill. • Expectations: Safe, flat water passage, protected paddling, close to shorelines, multiple easy berthing sites, jetties, clear signage, points of interest, visitor interpretation, often (but not always) facilitation (rental, guided).
Day paddlers – intermediate to advanced	• Distance: 2-5 hour paddle; 10-30km • Demographic: caters to paddlers with experience in closed paddle craft (i.e., sea kayak), with safety knowledge and ability to 'read' and respond to weather patterns and environment. Favoured by 'regular' paddlers, usually experienced in sea kayaking format, often affiliated to club or informal paddling community / friendship group. • Expectations: Safe water passage, can undertake open water and away-from shore paddling and crossings; prefers but does not require multiple docking sites – can improvise with shore-based landing sites; clear signage, points of interest, visitor interpretation, usually independent with own equipment (advanced); rental still sometimes required (intermediate).
Independent overnight paddlers	• Distance: Overnight stops spaced every 10–30 km (depending on weather, paddle environment, shore/camp access). • Demographic: as per Day Paddlers – intermediate-advanced; self-sufficient individuals or small groups. • Expectations: Access to good camping sites with minimum facilities and easy berthing; good facilitation information; 1-4 nights.
Supported overnight paddlers	• Distance: Overnight stops spaced every 8 to 20km (depending on weather, paddle environment, shore/camp access). • Demographic: Small groups; education market; intermediate paddlers. • Expectations: independent paddling supported by gear transfers, camp set ups, or transfers to oof route accommodation; 1-3 nights.
Fully facilitated/ supported paddlers	• Distance: Overnight stops spaced every 8km to 15km (depending on weather, paddle environment, shore/camp access). • Demographic: Beginner-low intermediate; small groups; education; corporate retreats; singles, couples, families. • Expectations: Full commercial, seamless, all-inclusive high quality guided experience. Comfortable through to luxury roofed accommodation separated from other users (or a shuttle to take to accommodation further away). Sense of remoteness, exclusivity. Options/accommodation for 1-3 nights.

5.2.1 Walking, cycling and kayaking market comparison³

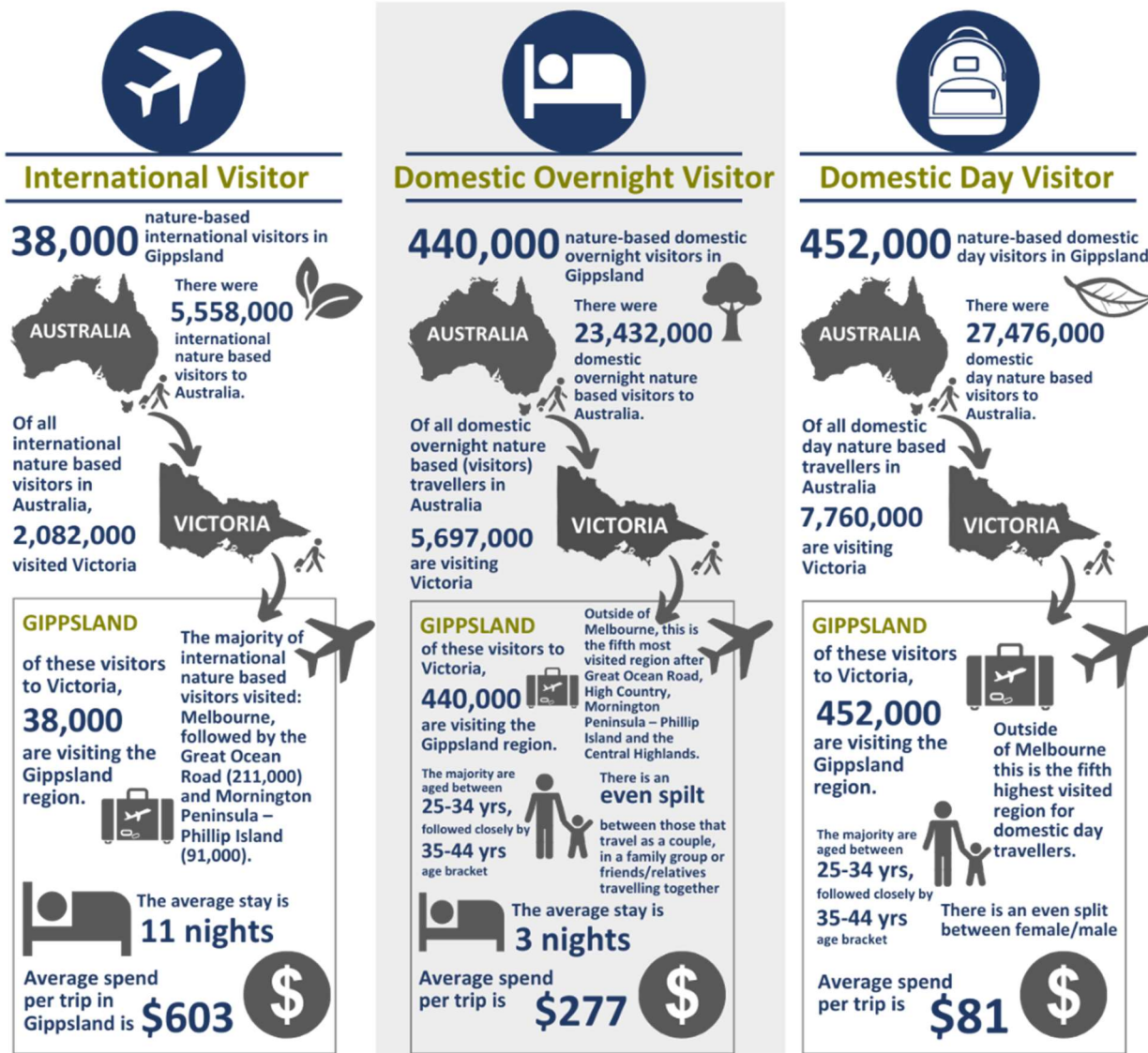
The infographic below shows the markets for the three main components of the proposed aquatic trail.

Figure 28. Three main markets



³ SportAus' AusPlay survey results for 2019 / <https://bushwalkingvictoria.org.au/about-us> / Participation in Exercise, Recreation and Sport Survey 2010 annual report / Dirt Art MTB Survey 2016 / Mordor Intelligence E-Bike Market 2020-2025, Executive Summary / <http://www.mtbiking.com.au/news/bike-price-rises-off-table-as-tariff-appeal-fail> / Tourism Research Australia, National Visitor Survey, International Visitors in Australia, domestic visitor profiles / Canoe Victoria's Strategic Facilities Plan 2015-30 /

Figure 29. Visitor Economy Snapshot



Visitors (4 yr average) Year End Dec 2019

5.3 THE WALKING MARKET

The walking market in Australia is growing. Within that market there are numerous pieces of the walking jigsaw: short walks, day walks, self-guided and supported, self-guided but not supported, guided and luxury small group guided journeys.

- In 2019, there were over 20.6 million trips (80.8 million nights) that included bushwalking and national park activities
- On average visitors stayed 3.9 nights per trip spending \$18.5 billion (\$895 per trip, and \$228 per night)
- Bushwalking is highest among:
 - those aged 25 to 44 years of age (20% of visitors)
 - those travelling with children (28% of family groups travelling together)
 - those who lived in capital cities (20%).
- The majority of domestic trips involving bushwalking (81%) went to regional destinations (16.7 million trips). This accounted for 23% of all domestic overnight trips to regional Australia.⁴
- 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.⁵
- It is estimated that around 3% of all walks in Australia are now extended or multi-night walks with over 50 promoted as overnight walks.

⁴ www.tra.gov.au/Domestic/domestic-visitor-profiles

⁵ Adventure Travel Trade Association Report 2018-19

5.3.1 Guided and premium walking experiences

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

Walking as a tourism activity continues to grow, with performance in the luxury fully facilitated walks segment showing exceptionally strong continued performance. Market research into this growing segment shows it includes visitors whose main interests include physical activity in a natural environment, without foregoing the creature comforts of home, and having authentic experiences with a sense of achievement.

To cater for the discerning High Value Traveller, the Signature Experiences Program was developed by Tourism Australia, incorporating the 'Best of Australia'. Great Walks of Australia is part of this program and consists of a marketing collective of Australia's multi-day guided walks. Each product within the collective is delivered by an independent operator who offers an expected level of quality, usually including luxury lodges, guided experiences, all-inclusive multi day walks ranging from 3-6 days. There is one Great Walks of Australia in Victoria – The Twelve Apostles Lodge Walk in western Victoria.

Due in part to the restricted availability, many of the Australian 'Great Walks' operated at or near 100% capacity, especially in peak periods.⁶

While relatively small in size, the fully facilitated walk market segment is being targeted with new walking experiences in iconic and scenic locations in every state and territory, and increasingly from international destinations. In the Eastern States, in addition to Queensland's plans for the introduction of five new signature walks, the Tasmanian government is introducing a sixth new premium walk, and the NSW Government has committed to bringing forward nine new major trail experiences.

⁶ Commercially confidential discussions with industry specialists

Although many visitors both domestic and international participate in bushwalking during their holiday, guided and accommodated overnight walking visitors are a relatively low volume segment. Despite being low volume, this is a high yielding market. It is estimated that around 200,000 Australians participate in annual high end extended or multi-night walks, but only 40,000 of them do these walks within Australia. In 2016 it was estimated that nearly \$250 million per annum in Australian ‘walking money’ was going offshore.⁷

This presents a significant opportunity for Gippsland given Victoria has very little product supporting overnight walking experiences, and given that New Zealand has twice the trade in this segment.

Although low volume, this is a very high value market segment creating significant employment and economic activity, as well as opening nature based tourism to new and influential markets.

Further analysis of trends in the global walking market, the walking market in Australia and guided and premium walking experiences is included at Appendix D.

5.3.2 Target Market Segments

Four core walking target market segments have been identified for the Gippsland Lakes experience as shown on the below diagram.



Across these user groups are the following four markets that are particularly drawn to nature and soft-adventure based experiences:

- Women Travellers
- Active 55+ (couples or groups)
- Young Adults
- Active Families.

⁷ Carruthers, F., Former rivals Geoff Dixon and Brett Godfrey partner in walking tourism venture, Financial Review Magazine, 2016

5.4 THE KAYAKING MARKET

The recreational kayaking market is a growth area of the paddling industry and paddlers enjoy the sport for fun, personal challenge, friendship, to improve health and physical activity levels, and connect with the environment.

There is an estimated core market of 30,000+ individuals engaging in informal and social paddling, via group and club paddles, commercial tours, scouts and guides, school and community camps and solo recreation in Victoria. According to Canoe Victoria, recreational paddling is the largest and fastest growing paddling market across Victoria.⁸

Connections between the paddling community and other outdoor recreation pursuits and activities are highlighted by the same report that indicated kayakers also participate in:

- cycling / mountain bike riding (55%)
- hiking / bush walking (32%)
- running (32%),
- swimming (27%)
- camping (23%)

Canoe Victoria identifies three tiers in the Recreational Paddler market: Lifestyle, Adventure and Extreme. Most tourism-related participation is in the Lifestyle and Adventure categories due to the lower barriers of skill and equipment required.

5.5 THE ADVENTURE CYCLING MARKET

The recreational off-road cycling market – inclusive of mountain biking, rail trail, gravel grind and bike touring/packing markets – is collectively a significant growth market nationwide, state-wide and regionally within Gippsland.

The development and facilitation of mountain biking in particular has been shown statistically to hold significant benefits across tourism and economic stimulus outcomes along with community benefits including health and wellbeing.

There has been demonstrable growth in destination-based mountain biking tourism whereby a large middle market of mountain bikers is seeking highlight ride experiences that focus on multi-day and journey-based experiences centred on high-quality landscapes. These can be bolstered by secondary tourism motivators (food and drink, history, culture, entertainment) and supported by off-trail facilities (accommodation, shuttles). Examples include Derby (Tasmania), St Helens (Tasmania), and the announcement of the \$12 million Red Centre Adventure Ride (NT).

Proposed trail developments in the Warburton Valley (Victoria), Omeo Mountain Biking Destination, along with recent feasibility studies for Gippsland G7 Mountain Biking Hub and Baw Baw Epic Adventure Ride concepts are indicative of the demand for nature-based cycling experiences.

⁸ Canoe Victoria Strategic Facilities Plan 2015-35.



6 Demand Estimates

Potential use of the Gippsland Lakes Aquatic Trail has been estimated for both local population and visitors to the region. The analysis has used population statistics and TRA visitor data combined with national participation rates for sports/activities.

Table 6. Participation Rates Sports 2019 Financial Year⁹

PARTICIPATION RATE (%)	TOTAL	15-17	18-24	25-34	35-44	45-54	55-64	65+	MALES	FEMALES
ACTIVITIES									TOTAL	TOTAL
Bush walking	7.4%	2.4%	6.4%	9.0%	8.8%	9.1%	8.5%	4.2%	6.7%	8.1%
Cycling	12.5%	5.0%	6.7%	10.8%	15.0%	19.1%	16.8%	8.6%	15.6%	9.4%
Mountain biking	1.6%	1.1%	0.9%	1.3%	3.2%	2.5%	1.4%	0.3%	2.6%	0.6%
Canoeing/Kayaking	1.5%	0.6%	0.6%	0.9%	1.4%	2.5%	2.5%	1.4%	1.7%	1.3%
Total	10.5%	4.1%	8.0%	11.1%	13.4%	14.1%	12.4%	6.0%	10.9%	10.0%

⁹ AusPlay survey results July 2019 - June 2020

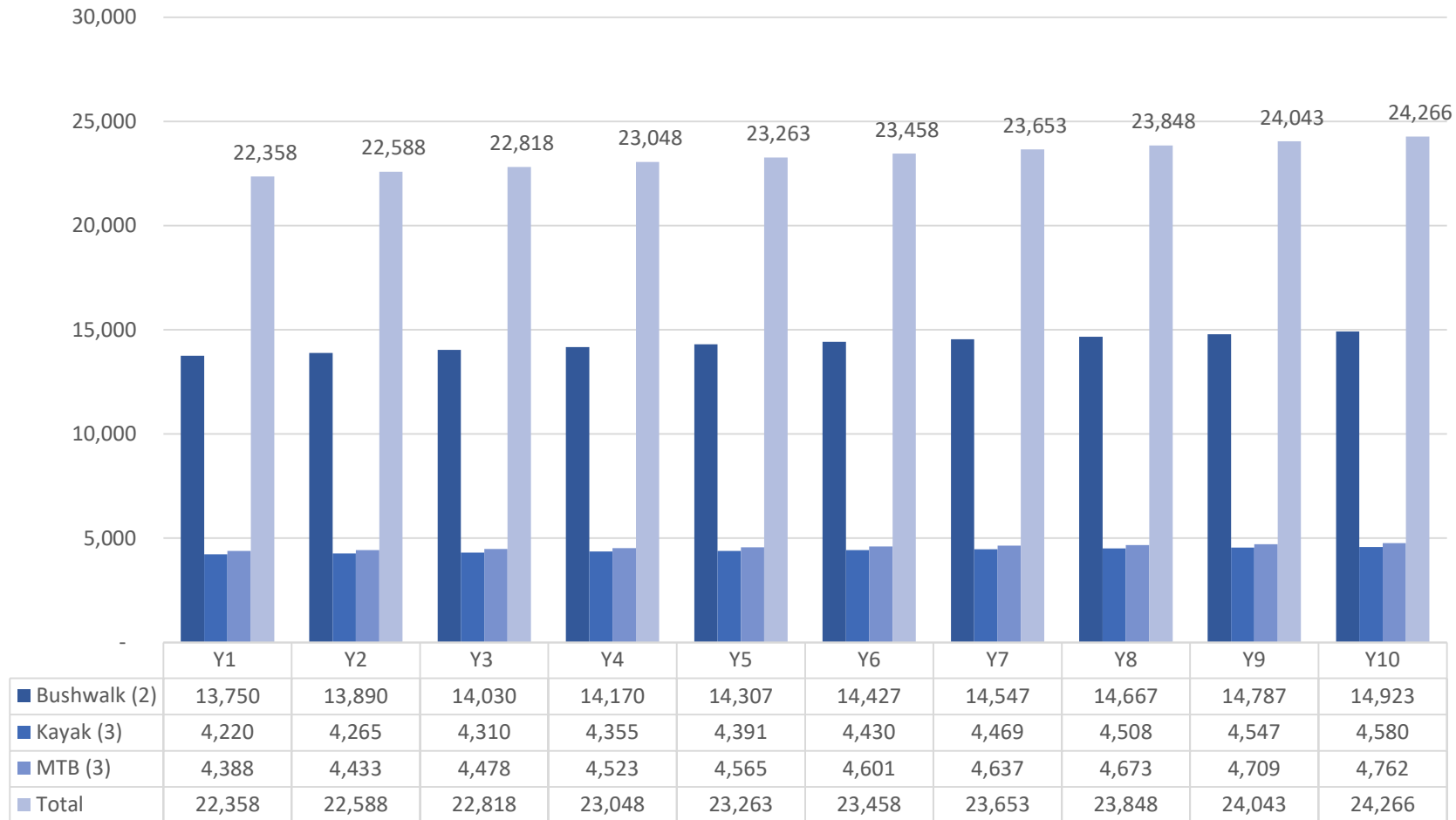
6.1.1 Local population use estimates

The following are estimates of local users of the Gippsland Aquatic Trail. Note trail users from other adjacent LGAs are assumed to be included in the domestic day visitor estimates.

Table 7. Gippsland Aquatic Trail – Estimated Local Users - East Gippsland & Wellington LGA ('000)

	2022				2026					2031
	1	2	3	4	5	6	7	8	9	10
Participants (estimates)										
Bushwalk	6,875	6,945	7,015	7,085	7,153	7,213	7,273	7,333	7,393	7,462
Kayak	1,407	1,422	1,437	1,452	1,464	1,477	1,490	1,503	1,516	1,527
MTB	1,463	1,478	1,493	1,508	1,522	1,534	1,546	1,558	1,570	1,587
Total	9,745	9,845	9,945	10,045	10,139	10,224	10,309	10,394	10,479	10,576
Uses of Trail										
Bushwalk (2)	13,750	13,890	14,030	14,170	14,307	14,427	14,547	14,667	14,787	14,923
Kayak (3)	4,220	4,265	4,310	4,355	4,391	4,430	4,469	4,508	4,547	4,580
MTB (3)	4,388	4,433	4,478	4,523	4,565	4,601	4,637	4,673	4,709	4,762
Total	22,358	22,588	22,818	23,048	23,263	23,458	23,653	23,848	24,043	24,266

Figure 30. Local Users of Gippsland Aquatic Trail (East Gipps & Wellington LGAs) – Estimates (no.)¹⁰



¹⁰ MCa estimates & analysis , November 2020 . Brackets() = uses per year.

6.1.2 Visitors

The Gippsland Lakes Aquatic Trail is located in two LGAs – East Gippsland and Wellington. Estimates were made of the of nature-based visitors by applying the share of nature-based visitors for Greater Gippsland to the visitor numbers for each of the two LGAs.

Table 8. Total East Gippsland LGA & Wellington LGA - Nature Based Tourist Visitors 2009-2020¹¹

Total East Gippsland & Wellington LGA Nature Based Visitors ('000)	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
International	16.258	18.521	18.049	17.314	16.231	17.295	18.001	18.343	21.288	24.111	24.202	17.943
Domestic overnight	120.585	115.755	120.238	109.758	142.263	128.617	144.273	149.402	179.863	195.279	207.389	222.974
Domestic day	73.187	78.150	75.189	53.349	66.949	59.092	84.569	92.139	117.238	130.476	141.198	136.660
Total	210.030	212.426	213.475	180.421	225.444	205.003	246.843	259.884	318.388	349.865	372.789	377.577

Estimates were made of nature-based tourist visitors that are pursuing activities that relate to the trail. It was assumed that the domestic day visitor share is the same as that for domestic overnight visitors. These shares were applied to the time series estimates for East Gippsland and Wellington LGAs to estimate visitors by activity.

Table 9. Total Bushwalk, kayak, cycle only ¹²

Total Bushwalk, kayak, cycle only												
Total East Gipps & Wellington	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
International	12.59	14.34	13.98	13.41	12.57	13.39	13.94	14.21	16.49	18.67	18.74	13.90
Domestic overnight	40.27	38.65	40.15	36.65	47.50	42.95	48.18	49.89	60.06	65.21	69.25	74.45
Domestic day	25.82	27.58	26.53	18.82	23.62	20.85	29.84	32.51	41.37	46.04	49.82	48.22
Total	78.68	80.57	80.66	68.88	83.70	77.19	91.96	96.61	117.92	129.92	137.82	136.57

¹¹ MCA Estimates based on <https://www.visitgippsland.com.au/resources/travel-to-the-greater-gippsland-region-and-its-sub-regions-year-ending-march-20> November 2020

¹² MCA Estimates based on <https://www.visitgippsland.com.au/resources/travel-to-the-greater-gippsland-region-and-its-sub-regions-year-ending-march-20>

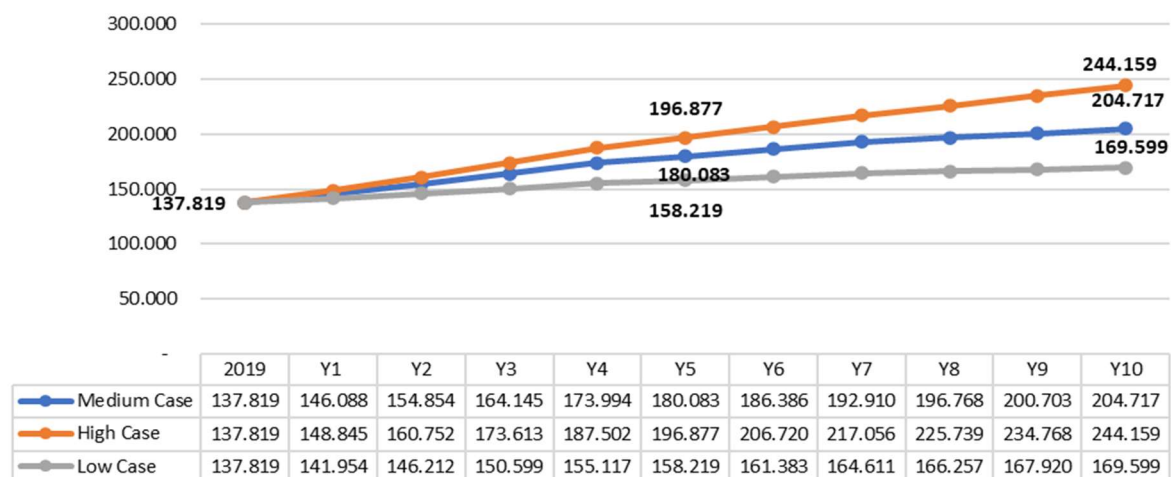
The following are projected number of tourist visitors who may use the trail. The visitor numbers are for the two LGAs where the lakes are located (East Gippsland LGA and Wellington LGA). They show the scope of the market for the Trail.

The growth rates are assumed for each of the cases, however the medium growth scenario largely reflects recent growth rates to 2019 for nature-based visitor¹³

Table 10. Assumed Growth Rates for Tourist Visitors¹⁴

Assumed		Years		
Growth Rates %		1-4	5 to 7	8 to 10
Medium Case	Base Year 2020	6	3.5	2
High Case	Base Year 2020	8	5	4
Low Case	Base Year 2020	3	2	1

Figure 31. Potential Visitor Market for the Gippsland Aquatic Trail ('000)¹⁵



¹³ Note 2020 is not included due to the impacts of COVID-19 and the restrictions on travel from early 2020.

¹⁴ MCa Assumptions, November 2020

¹⁵ MCa estimates & analysis, November 2020

Figure 32. Potential Visitor Market for the Gippsland Aquatic Trail ('000)¹⁶

Medium Case	Year 2019	1	2	3	4	5	6	7	8	9	10
('000)	Base Year	1.06	1.06	1.06	1.06	1.035	1.035	1.035	1.02	1.02	1.02
MEDIUM CASE											
International	18.745	19.870	21.062	22.326	23.665	24.493	25.351	26.238	26.763	27.298	27.844
Domestic overnight	69.251	73.406	77.810	82.479	87.427	90.487	93.654	96.932	98.871	100.848	102.865
Domestic day	49.824	52.813	55.982	59.341	62.901	65.103	67.381	69.740	71.134	72.557	74.008
Total	137.819	146.088	154.854	164.145	173.994	180.083	186.386	192.910	196.768	200.703	204.717
High Case	Year 2019	1	2	3	4	5	6	7	8	9	10
('000)	Base Year	1.08	1.08	1.08	1.08	1.05	1.05	1.05	1.04	1.04	1.04
HIGH CASE											
International	18.745	20.245	21.864	23.613	25.502	26.777	28.116	29.522	30.703	31.931	33.208
Domestic overnight	69.251	74.791	80.774	87.236	94.215	98.926	103.872	109.065	113.428	117.965	122.684
Domestic day	49.824	53.810	58.114	62.763	67.785	71.174	74.732	78.469	81.608	84.872	88.267
Total	137.819	148.845	160.752	173.613	187.502	196.877	206.720	217.056	225.739	234.768	244.159
Low Case	Year 2019	1	2	3	4	5	6	7	8	9	10
('000)	Base Year	1.03	1.03	1.03	1.03	1.02	1.02	1.02	1.01	1.01	1.01
LOW CASE											
International	18.745	19.30727	19.886488	20.483083	21.097575	21.519527	21.949917	22.388916	22.612805	22.838933	23.067322
Domestic overnight	69.251	71.328189	73.468034	75.672075	77.942238	79.501082	81.091104	82.712926	83.540055	84.375456	85.219211
Domestic day	49.824	51.318352	52.857903	54.44364	56.076949	57.198488	58.342458	59.509307	60.1044	60.705444	61.312499
Total	137.819	141.95381	146.21243	150.5988	155.11676	158.2191	161.38348	164.61115	166.25726	167.91983	169.59903

The next steps in this analysis would be to estimate the potential numbers in each of the target market segments for visitors: Day Walkers; Independent Overnight walkers; Supported Overnight Walkers; and Fully Facilitated Walkers. Estimates would then be prepared on spending in the region for these categories and the economic impact analysis would be undertaken (for the construction phase and operations phase).

¹⁶ MCA estimates & analysis , November 2020

7 Economic and Social Assessment

This section provides a summary economic impact assessment of the public investment in the proposed Gippsland Lakes Aquatic Trail. Full details are included in Appendix E.

The results are indicative of the potential benefits from the development and operation of the trails network. The modelling is based on: estimates of annual users/rides (in different categories); and other assumptions utilised in quantifying spending in the areas adjacent to the trail segments.

The development and connections will generate substantial positive economic benefits for the region, during the construction phase and in the operations phase.

Trail Use & Regional Spending

Trail users were estimated for 3 Cases (Medium, High, Low) For the cases, users comprise visitors (international, domestic day, domestic overnight) and local users (residents of the 2 LGAs).¹⁷ Users from adjacent LGAs are included in the domestic day/overnight user numbers.

For the Medium Case (the most likely result), total users increase from around 155,600 in year 1 to 217,600 in year 10.

The combination of user numbers by type, average spending and average length of stay is used to estimate annual spending (in constant 2021 dollars) in the region. For the Medium Case total spending increases from \$38.5 million in year 1 to \$55.7 million in year 10.

¹⁷ The same estimated local users are included in each of the 3 cases.

Construction Phase Jobs

Trail construction cost is estimated at \$12 million. A total of 41.7 FTE jobs (33.6 direct jobs and 8.1 indirect/induced jobs) would be generated in the region during the construction period. The direct jobs comprise 27.7 FTE jobs in on-site construction and 5.9 jobs in materials/equipment supply.

Operations Phase Jobs

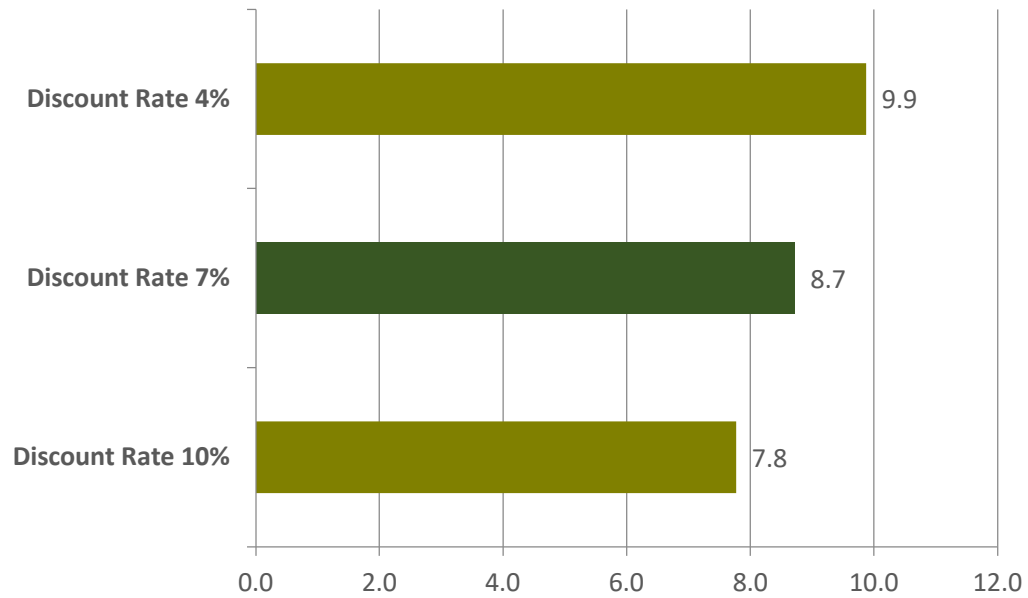
The ongoing growth in user numbers will support an increasing number of jobs in the region. For the Medium Case:

- The operation of the trails would generate a total of 153.7 direct full-time equivalent jobs in year 1, increasing to 222.4 direct FTE jobs in Year 10. Total jobs (direct and indirect/induced) are 177.2 FTE in year 1 increasing to 253.4 in year 10.
- The major contributors to jobs are domestic overnight visitors and domestic day visitors.
- On a sector basis, the jobs (FTE- direct and indirect) generated by trail users are mainly concentrated in: accommodation; food and beverage; recreational services and other visitor products and services; transport (including shuttles); and other retail.

Benefit/Cost Analysis

The chart below compares Benefit Cost Ratios (BCR) for the 3 discount rates. For a trail project a 7% discount rate is appropriate, and the project yields a positive BCR of 8.7. The present value of total benefits (\$130.766 million) generated by the investment are 8.7 times the total costs of the project (\$15.00 million) over a 10-year period.

Figure 33. Benefit Cost Ratio (BCR) - Gippsland Aquatic Trail - All Benefits



Source: MCA modelling & analysis, June 2021.

Appendix F also contains detailed modelling of the likely economic benefits of private investment in accommodation.



8 Marketing

An experience-based product with as many operational facets, levels of user engagement and different target markets as encompassed in the Aquatic Trail offering means that marketing and communication – and the distilling of the various offerings into an easy to comprehend narrative – is paramount.

It is critical when marketing such a layered product to different audience segments that the correct content and messaging is created for the right market, and that it reaches them via the best channels distinctly used by each market.

Communication needs to be clear and focused on specific audience needs. This relates to all audiences, whether it is the ‘soft adventure’ and leisure market with an interest in the broader (and supplementary) experience offer, or special interest or ‘adventure challenge’ markets with a specific and targeted desire to know more about the diversity and quality of the nature-based or outdoor active experiences available i.e. a paddle-sport visitor.

Experience from places such as Three Capes in Tasmania also indicates that the markets can and will choose their own means of accessing the experience based on the quality of the natural environment.

Marketing of the Gippsland Lakes Aquatic Trail will be enhanced through collaboration such as:

- cooperative marketing campaigns that involve private sector, tourism operators and other government agencies, such as the Destination Gippsland and Visit Victoria.
- leveraging relevant campaigns that are already in market, such as the GippsWONDERLand campaign
- working with local and regional tourism operators to communicate consistent messaging and promotions via their channel reach
- offering benefit to tourism providers via collective content creation involving and focusing on operators

For all markets, it is important to provide inspirational and accessible content, images and videos to view and share on popular digital platforms (specific to the target audience). This will be critical for promotion and growing advocacy, especially among the outdoors and nature-based markets.

Digital platforms, such as Instagram and Facebook, continue to strengthen in popularity as key communication channels, especially for *younger adults* and *millennial women*. Older adults are increasingly using Facebook as a communication channel.

Another high priority is the use of key influencers such as vloggers and other online creators in the travel, adventure, and recreation space, who are playing an increasingly important role in influencing travel decisions made by their target audiences.

It is important to note that digital platforms and the popular use of them is an ever-shifting arena, where disruptor channels can appear and quickly grow in popularity (and therefore influence) i.e. TikTok. Such channels need to be monitored and assessed for their demographic and influence contrasted with the preferred target market for an experience, and then responded to (or not) accordingly in the marketing communications mix.

It will be vitally important to building broader knowledge of the trail brand to start promoting aspects of the experience as it is developed.

Finally, positioning the trail as an accessible aquatic adventure playground will assist in differentiating the overall experience from other single-focused experiences, such as existing Great Walks or mountain biking destinations.

KEY MARKETING OUTCOMES:

- Overarching marketing and communications strategy for the Gippsland Lakes Aquatic Trail
- Content creation addressing general and specific marketing needs
- Brand creation with associated iconography
- Partnership identification and engagement

8.1 DIFFERENTIATING THE EXPERIENCES

The collective Aquatic Trail experience is relatively complex in terms of the variety of ways it can be engaged with:

- fully-, semi- or self-supported
- single or multiday
- all or part itinerary
- multiple or single activity.

This complexity brings with it challenges in ensuring the market is not confused by the offering. Clear messages need to be created around the understanding of how a user might want to engage, with information architecture designed to step a potential visitor through the information stream that is relevant to their particular interest in undertaking a journey.

The complex nature of the offering and broad range of engagement profiles will require careful planning to ensure pre-trip content marketing is created strategically to appeal to the audience via the correct channel in the correct tone.

Pre-trip media should be structured in a tiered way that speaks to the stage of journey a potential visitor is at in making a travel and engagement decisions. As such:

- **Top-tier: information** that is inspirational and informative for all markets, outlining the overall GLAT offering, the range of choices and experiences on offer and what users can expect from each journey. This initial, broad-based marketing may encompass landing pages on website/s, primary brochures, above the line promotions (advertising campaigns, posters, billboards etc) and PR activities.

- **Second-tier:** information and marketing that is curated to target a particular audience, using imagery, language, tone and detailed information that further entices and informs a specific profile of visitor seeking a specific experience. This may take the form of communication packages that target by preferred activity, preferred skill or challenge level, or preference for supported or unsupported engagement. It may include second and third level pages on websites that speak to a particular engagement profile, or may encompass marketing content that is created for specific channels i.e. adventure channels vs. family holiday channels; or for specific activities i.e. focusing on walk elements of GLAT over paddling elements.

Importantly, as with all communications for the Gippsland Lakes Aquatic Trail, the pathway of further information needs to be clear and present.

8.2 BRANDING / NAMING THE TRAIL

It is important to ensure both the name and the brand of the Gippsland Lakes Aquatic Trail appeals to a broad profile of potential users as discussed in the Market Assessment chapter. Tenets of a name and brand should consider:

- Simplicity – speaking directly to what and where the experience is
- Appeal – ensuring name and brand speak to markets who may be at opposite ends of the engagement spectrum i.e. challenge based vs. leisure based; hardcore vs softcore; unsupported vs. fully supported
- Coverage – ensuring the name and brand adequately represent the ‘choose your own adventure’ nature of the offering

Challenges to consider include: the confusion of calling it an ‘Aquatic’ trail given activities and the itineraries on offer are predominantly land based; confusion in some eyes of an aquatic experience being called a ‘trail’; confusion of the word ‘trail’ being used to encompass multiple ‘trails and experiences; ability to reference adventure without losing appeal to visitors who don’t consider their activities (even in nature) as ‘adventure’.

On balance, to not use words such as ‘aquatic’, ‘trail’ or ‘adventure’ and/or associated iconography and imagery would equally be to limit appeal.

‘Gippsland Lakes’ should remain within naming and branding protocols and an immediate identifier of place and to mesh with other Gippsland-based experience brands and marketing.

The working title of ‘Gippsland Lakes Aquatic Trail’ perhaps best maintains a balance. Other options may extend to:

- Gippsland Lakes Aquatic Adventure Trails
- Gippsland Lakes Adventure Trails

8.3 MARKETING PRODUCTS

The Gippsland Lakes Aquatic Trail encompasses numerous experiences and visitor engagement profiles. Each profile needs to be targeted by marketing specific to the appropriate product.

- **Signature Trail** - is the ‘hero’ experience used in Tier One communications as the iconic experience representative of what the GLAT offers more broadly. It is an early-adopter, curated offering, and communicated predominantly as a fully-supported experience inclusive of guides, water transfers and eco-accommodation.
- **Multiday Itinerary Experiences** - inclusive of all primary suggested four itineraries along with messaging that reinforces all trails and parts thereof can be used to create customised multiday itineraries suitable to a visitors’ needs, wants, skills, experience, equipment and budgets.
- **Single Day Itinerary Experiences** – ensuring short trip, single day and local users are aware that the GLAT offers options of accessible half and single day trips on parts of the GLAT network, across activities and difficulty ratings.
- **Multi activity experiences** — ensuring users are aware that the GLAT offers options of multiple activity itineraries inclusive paddling, walking (and running) and cycling both supported and unsupported across the GLAT network.

- **Single activity Experiences** - ensuring users are aware that the GLAT offers options of single activity itineraries chosen from paddling, walking, running or cycling, across the GLAT network both supported and unsupported.
- **Supported Experiences** – given the likely requirement for a mix of transfer, guide, accommodation, catering and equipment support required to engage in many of the set and choose your own adventure itineraries, marketing should create awareness around specific tour and transfer operator, equipment hire operations, catering and accommodation options aligned to the GLAT experience. This can include high end, fully supported journeys, such as that designed around the Signature Trail 1, or lower levels of support.
- **Unsupported Experiences** – it is important to ensure self-supported visitation is encouraged, as an important market that still injects visitor spend into the local economy via supplies, accommodation and equipment rental.
- **Associated Experiences** – such as Stand Up Paddle Boarding, extended tours and activities (i.e. MTB), cultural and heritage attractions and experiences, and culinary tourism (i.e. wineries) that may appeal to the GLAT target market are given some visibility in marketing programs to highlight choice for visitor and support local aligned businesses.
- **Associated Accommodations** – inclusive high end, B&B, holiday park, and camping (including free camps) should be given visibility in some marketing and information packages to highlight choice for visitor and support local aligned businesses.

8.4 PARTNERSHIPS

Critical to extending the reach and power of marketing and communication efforts for the Gippsland Lakes Aquatic Trail will be coordinated and cooperative partnerships with relevant organisations who each have a stake or influence in marketing outcomes. They include:

- Tourism Australia
- Visit Victoria
- Destination Gippsland
- East Gippsland Shire Council / Visit East Gippsland
- Gippsland Local Government Network
- Gunaikurnai Land and Waters Aboriginal Corporation (GLaWAC)
- Parks Victoria
- Lakes Entrance Action & Development Association
- Sale Business & Tourism Association
- East Gippsland Marketing Inc (EGMi)
- Paynesville Business & Tourism Association

Each partner organisation should be consulted to ensure GLAT campaigns and messaging are appropriate to their channels, and to ensure each organisation is aware of and engages with promotional opportunities via GLAT campaigns.

8.5 PLANNING

As the on-ground experience is progressed towards being market-ready, it is critical that a Marketing and Communications Plan be developed for the Gippsland Lakes Aquatic Trail and include (as a minimum):

- Vision – industry and community sentiment
- Current situation, including regional strategic and regulatory context
- Strengths, elements and assets to leverage, challenges and gaps that need to be overcome
- Target market psychographics and insights
- Alignment of passion points and values between community and visitors
- Proposition, positioning, points of difference
- Case studies to learn/drawn from
- Map of customer journey
- Identification of gaps and opportunities
- Roles and responsibilities of all parties to contribute to outcome
- Pathways for implementation - responsibility, lead and support, timeframes, priority level
- Positioning and storytelling – destination positioning, experience positioning, summary of potential storytelling opportunities
- Outcomes/measures for evaluation of success: social, natural, cultural and economic wellbeing

This Marketing and Communication Plan will ensure all stakeholders and partners and all associated marketing activities are aligned via consistent messaging with clear and agreed goals in terms of visitor engagement.

9 Investor Attraction

A private partnership to deliver accommodation in public land can make positive contributions towards conservation of the environmental and cultural values of a protected or natural area while assisting in the development of sustainable contemporary visitor infrastructure and experiences which enhance visitor satisfaction and appeal and provide benefits for local communities including indigenous people.

Important considerations include:

- The land manager being open to an appropriate proposal from a potential investor as well as offering suitable sites, or through the process of advertising more openly for expressions of interest from potential operators to build and construct such infrastructure
- Adopting a triple bottom line sustainability-driven approach that is objective and based on sound principles
- the choice of high-quality sites is essential if an exceptional visitor experience is to be offered, noting the planning considerations that may need to be adhered to, or amended if appropriate
- Recognising and allowing for the vision, innovation and market knowledge of the investor through offering choice in site options without being overly prescriptive
- Minimising the level of investment by Government or investor before it is clear that a site will be suited to and capable of development
- Supporting investors in proceeding to development through a case management approach that allows for efficient dealings with multiple Government agencies (highly likely in the context of the Gippsland Lakes)
- Government being sensitive to the fragile feasibility aspects of many sites and offering adequate lease terms to support business viability.

9.1 KEY STEPS

9.1.1 Pre-proposal

Information needs to be readily accessible to interested parties

- Clear advice must be provided that articulates that only sustainable, landscape appropriate and brand aligned developments that enhance the visitor experience are appropriate
- Legislative requirements related to developments, issue of leases and licences and project approvals should be readily available and specified
- The steps that will be applied to the process (whether investor or Government initiated), including relationships to environmental impact assessment and other approvals, should be clearly described
- Clear objectives, standards, and criteria should be applied to consideration of proposals at all stages of the decision-making process
- Guidelines for decision-making processes should be made available to potential investors and the public, and include any case management arrangements.

9.1.2 Land Array/Site Identification

Relevant tourism and commercial expertise should be obtained in the choice of sites to ensure sites have commercial potential.

- Site offering should be as broad as possible – ideally landscape/park wide.
- A site should reflect a sense of the place, relate to the experiential aspects of the product, and be attractive to visitors.
- A site should have:
 - ease of access for transport of visitors and services
 - a footprint adequate to the scale of the development and able to encompass self-contained sustainable infrastructure
 - reliable access to the experiential undertakings surrounding the site.
- There should be flexibility for site choice and design within the boundaries of a designated development area that also takes into account sea level rise and other climate change risks
- A site should be compatible with the requirements of government legislation, policies and park management and cultural heritage plans
- Development of a site should be compatible with other park operations or visitor needs, or designed to not impact on other park users.

A site should be capable of sustainable development that:

- is compatible with the natural and cultural values of the land and its surroundings
- utilises sustainable and efficient use of natural resources, energy and water that protects ecological integrity and environmental quality
- is of appropriate form and scale to maintain the quality of the visual landscape
- adds to the overall visitor offer and is appropriate to the visitor use and character of the site and its surrounds.

Community support for the opportunities needs to be fostered through transparent processes, community consultation and promotion of community benefits.

Risks such as fire, emergency and sea level rise need to be considered in the site selection process and where possible, controls put in place that reduce the risk to the visitors and the community at large.

9.1.3 Pre-release Site Readiness

- Whilst site readiness and confidence in the availability of a site will be important to investors, over investment in due diligence needs to be avoided until it is clear there will be an interest in the site
- A risk management approach to site readiness needs to be taken where only those key issues that will stop development are addressed before seeking expressions of interest. These might include plan of management or planning regulations (or ability to amend these), Gunaikurnai cultural issues, flood and fire risk, and availability of water
- Other constraints that may be manageable or variable through siting, design or infrastructure (such as threatened species, energy supply, roads etc) should not be researched until there is a known interest in the site.

9.1.4 Approach to Investors

The first stage is to seek interest and evaluate interested parties on their business and capacity to deliver brand aligned experiences. Gunaikurnai as a partner in the development of the experience must be involved in the process, indicating where they have business capability of interest in operating/developing components of the experience.

Prequalifying criteria need to focus on three key areas:

- Operator reputation, experience and capacity to deliver triple bottom line brand value
- Sustainable business model
- Suitable brand aligned concept.

Avoid detailed sustainability criteria at EOI stage.

Preliminary Concept Assessment criteria.

Preliminary Concept Assessment criteria need to focus on the capacity of the concept to achieve sustainable outcomes.

- Commercial viability and sustainability of the project over time
- Provision for the sustainable and efficient use of natural resources, energy and water, including waste management and avoidance of pollution
- Form and scale of buildings and structures appropriate to the site character and landscape setting and which minimise the environmental footprint
- The relative roles of the investor and the land manager in bringing the proposal to fruition and suggested support mechanisms and/or financial incentives.

9.1.5 Concept Development

- A case management approach for government procurement and approval processes is important to provide clarity and consistency and reduce costs and time for investors
- Investors need to be confident that their commercial-in-confidence and intellectual property are protected
- Processes related to procurement, approval and administration of eco-opportunities should meet government probity requirements for equity, transparency and consistency.

Final assessment criteria

Final assessment needs to focus on long term benefits and there needs to be recognition that eco-opportunity projects in most cases require several years to establish themselves and achieve financial viability. There also needs to be recognition of the wider community benefits and the multiplier effects of a project as opposed to just the financial returns to Government. In most cases, financial returns to Government may take several years to become material.

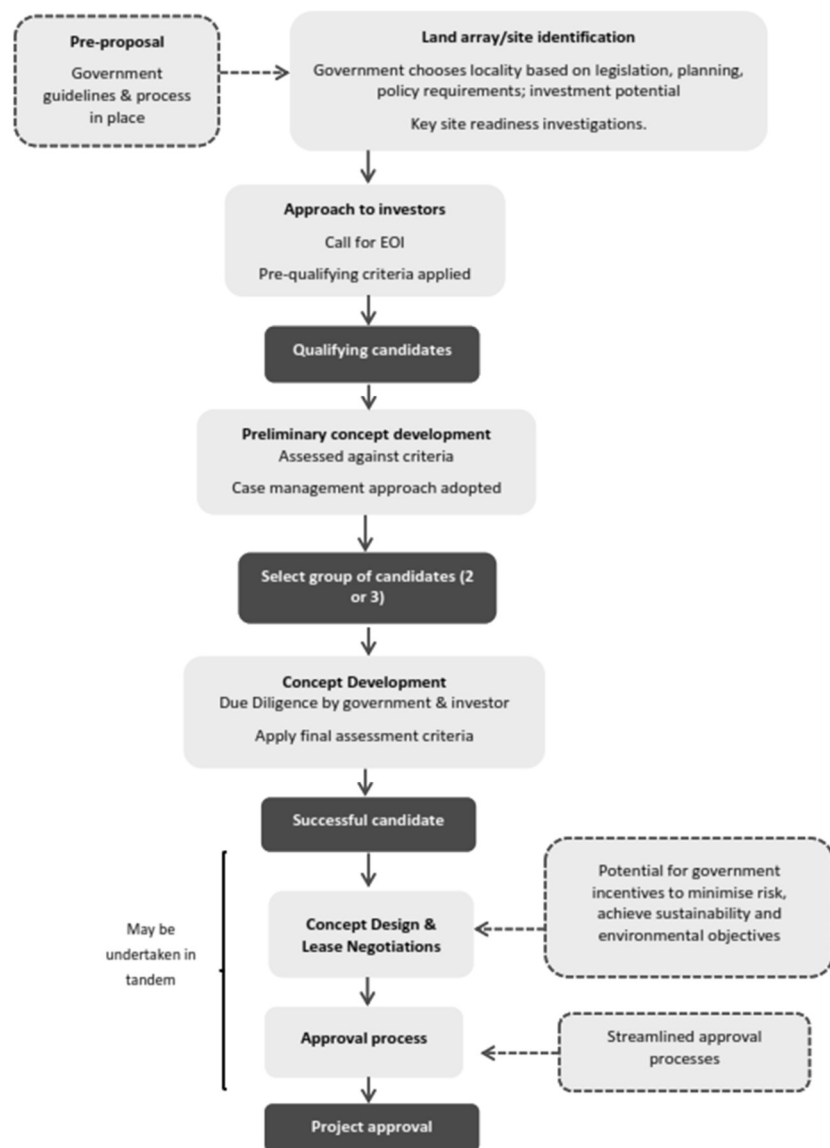
With this in mind, some of the final assessment criteria might include:

- A re-evaluation of the proposal against environmental and financial sustainability criteria
- Return on investment (social and conservation) to Government and the community
- Benefits to joint management partners
- Measures to manage impacts and relationships with other visitors to the area including minimal impact practices related to client activities
- On ground needs of operator and park staff and potential for effective long term relationship
- Level of improved protected area perception and appreciation by public as a result of the project.

9.1.6 Concept Design and Lease Negotiations

- Adequate resources and appropriately experienced government staff are required to negotiate successful partnership processes and to work with the investor and Government to shape the final concept
- There should be site tenure appropriate to the capital investment and return on that investment (eg.20 - 30 years for this scale of infrastructure, noting the Victorian Government guidelines for investing on Crown Land), and ideally the possibility of, or incentives for, tenure extension
- An exclusive arrangement or competition-free exclusion zone is desirable
- Financial leniency provisions in the first 5 years of operation are desirable to assist developers in making capital investments on the site and in establishing themselves in the marketplace
- Case management and cross departmental coordination is important to ensure that all Government agencies get behind the new development
- Any commercial operator permits and licenses important to the experiential offering should be tied to the tenure period.
- Financial incentives and assistance by Government need to be considered.

Figure 34. Typical project approval process for investment in ecotourism experiences on crown land



9.2 INVESTOR SOUNDING

While the previous section outlines the key steps typical in the development of private or public/private partnerships in ecotourism developments, investor sounding remains a potentially important part of the process.

While government agencies and processes often work to minimise risk and to put community interests as a high priority (which are considered appropriate), determining the level of commercial risk investors are likely to take, and helping understand the opportunity from private investors can be an important part of the process to help ensure all requirements (including financial sustainability) are met.

Managing the sounding in a way that provides appropriate due diligence is one that requires careful consideration. Options include open investor EOIs, seeking advice from investors as to the best longer-term solutions (including new and innovative ways to make sustainability and risk management front of mind in an outcome sense) are important.

An alternative model is to engage an investor or previous operator of such an experience as an advisor to the process noting that they will not be able to participate in the selection of candidates. This approach ensures the private sector investor issues are identified and dealt with in the EOI but no one investor is advantaged.

Select tendering or direct engagement is available as an option where the experience may only be able to be, or can logically only be operated by one investor or company.

10 Governance Arrangements

10.1 DELIVERY MODEL

10.1.1 General

Delivering a project of this scale and complexity is difficult in an environment where the proposed main experience passes through several tenures, requires approval of several land managers under several acts, will require various approvals from Councils, intersects with the Traditional Owners, may require some form of community involvement, and requires a proponent.

Notwithstanding the challenges, the following section provides one of several models by which government, industry, traditional owners and councils can work together to put the proposal to market.

Ultimately, the decision on whether to risk capital is a market-based decision. De-risking the proposal as far as practically possible without having the project partners take on unnecessary risk themselves is also part of the balancing act of putting this to market.

10.1.2 Assumptions

The first assumption to be considered is that the 'hero' experience of the supported trail including accommodation is the core element that requires multi agency governance arrangements for it to be considered in the market-place.

Many of the 'secondary' self-reliant experiences can be achieved through packaging of existing infrastructure, experiences and other elements.

The package of experiences that forms the Gippsland Lakes Aquatic Trails are led both in the economic benefit and in the market-place by the supported 4-day, 3-night 'luxury' experience and this is deemed the most important to resolve.

Should this be successfully delivered, then the other trails and the markets they are designed for will likely follow.

10.1.3 The Project Lead

As mentioned earlier in this section, the proposed experience is multi-tenure one. To succeed, one agency needs to drive this as a project manager, with the full support of the other organisations involved. A number of alternative agencies are considered below.

Table 11. Project Lead Considerations

AGENCY	CONSIDERATIONS
DELWP	As one of the land managers, DELWP could take the lead but it also may conflict the Department as it would have a role in several of the consents including the Marine and Coastal Act consent required.
Parks Victoria	The predominant land manager on whose land the experience is planned to traverse and partner with the Gunaikurnai in the Lakes NP. And Gippsland Lakes Coastal Park. Has taken on being a proponent in the Falls to Hotham experience and also in the Grampians.
DGL	The regional tourism board that is a company with shareholders including the 6 local government areas of Gippsland. Has product development within its accountabilities.
RDV	RDV is the State based agency funding and promoting has an objective of growing regional economic activity. Project managing the implementation of a project may be at odds with its funding and partnership development roles.

AGENCY	CONSIDERATIONS
Gippsland Ports	Gippsland Ports manages much of the on-water infrastructure including jetties and navigation aids in the lakes system. Leading the development of this experience may not be core business.
East Gippsland Shire Council	Has economic development across its portfolio of accountabilities. Much of the experience development sits within E Gippsland Shire. The Shire is currently experiencing substantial workloads through bushfire recovery and COVID recovery.
Wellington Shire	Like East Gippsland, it has economic development within its portfolio. Parts of the experience development sit within the Wellington Shire. With the majority of the experience sitting outside the Shire it may be difficult for Wellington to take this on despite the capability and fit with the business.
East Gippsland CMA	The CMA has accountabilities under the Water Act and the CALP Act. It is also acts as a referral agency to Council on planning matters on floodplains. Leading a tourism development is most likely outside its core business.
GLaWAC	The development of the opportunity could be done by GLaWAC. Capacity constraints on the existing Economic Development Team may mean that they are best placed to contribute to the development and seek to guide and implement operations.

While not exhaustive, the list above provides for three logical choices to take on project management of the experience development – East Gippsland Shire Council, DGL and Parks Victoria.

On balance, and notwithstanding the funding issues, DGL is most likely the best placed agency to be project lead for at least the first several stages outlined in section 8 of this report.

DGL cannot however do this on their own and are most likely not funded to undertake this type of project management. The following sections outline the role of other agencies in supporting the process.

10.2 FUNDING FOR THE NEXT STAGE

To progress to the next stage, DGL will need funds to support the project leadership role it is proposed to have (if not DGL the same will apply to other organisations).

Funds will be required for a range of studies aimed at achieving statutory approvals, including native vegetation controls, potential cultural heritage surveys, engineering of the proposed rock wall/boardwalk near Kalimna and a range of other measures.

Several funding models could apply as shown below.

Table 12. Funding Models for the Next Stage of Development

MODEL	COMMENT
Co-contribution model	Relevant agencies contribute towards the cost of the next stage and the project management is funded.
Grant Funding Model	DGL as preferred project lead seeks funding for the project management including several of the studies required.
Private Model	DGL takes the concept to market as an opportunity but without de-risking the project through further government support into the approval and site selection.

The preferred model is a combination of the first two – with agencies contributing towards the cost of project management, and DGL being supported through RDV or the Latrobe Valley Authority (LVA) for funds to contribute to the next phases.

10.3 PROJECT CONTROL BOARD

Typically used for larger more complex projects, the Project Control Board (PCB) is considered a preferred option for this project.

The suggested makeup of the board would include:

- DGL as project manager
- Wellington Shire Economic Development and/or Tourism
- East Gippsland Shire Economic Development and/or Tourism
- Parks Victoria Regional Director
- DELWP Regional nominee
- Gunaikurnai GLAWAC business development function
- RDV as co-funder (likely).

The role of the Board is to implement the experience development to a point where it can be put to market, and to oversee experience being taken to market.

The PCB will by necessity have the following attributes:

- A terms-of-reference signed onto by the members
- Be a collective with agencies working together to achieve the stated objective of taking the experience to market
- Tasked with de-risking the opportunity to the extent possible through careful planning and support of the requirements of the various regulations and acts to be navigated
- The ability to co-opt other agencies and or business leaders onto the PCB or from time to time providing input
- The ability to have a Technical Reference Group as part of the process.

10.3.1 Gunaikurnai

While Gunaikurnai represented through GLAWAC are recommended to sit on the PCB, it is also recommended that GLAWAC be offered preferred supplier for some of the elements which may include the boat transfer business by way of example.

This will require some navigation and flexibility with Gunaikurnai and the Project lead. For example GLAWAC may ultimately be a financial partner to the entire business, or chose to operate some parts of the business for the lead operator. The best model for GLAWAC will emerge through the next phase of detailed planning and putting this to market.

APPENDIX A. Details of Journeys

GOOGLE MAP: https://www.google.com/maps/d/edit?mid=1G55PA5_YN5jpk7QmEsySlpngP3jI86E5&usp=sharing

Table 13. TRAIL #1 – GIPPSLAND LAKES AQUATIC TRAIL - Bullock Island >Port of Sale

TRAIL #1 – GIPPSLAND LAKES AQUATIC TRAIL - Bullock Island >Port of Sale			
STARTS	Bullock Island Road Car Park (north) / Boat Ramp (near skate park), Lakes Entrance		
FINISHES	Loch Sport or Nunduk Resort (extension night, Seacombe) > Port of Sale		
DAYS / NIGHTS	4/3 (ALT: 5/4)		
RATING	Easy		
SECTIONS OVERVIEW	• Walk: 4 • Paddle: 1 • Boat transfer: 2 • Bus transfer: 1 • Alternatives: 2 x ride (potential; day 3/4) • Optional add-ons: Wild Swim, Stand Up Paddle Board, birdwatching • Other interactions: Cultural / First Nations • Extension: potential Nunduk spa/wellness retreat at finish + journey in to Port of Sale via boat transfer or mix of transfer/ride/walk + Art Gallery visit.		
SECTIONS ITINERARY	• DAY 1: Walk [ALT: paddle + walk] • DAY 2: Paddle > Walk > Paddle • DAY 3: Boat Transfer > Walk > Paddle > Walk [ALT: Boat Transfer > Ride > Boat Transfer > Walk] • DAY 4: Boat Transfer > Walk > Bus transfer [ALT: Boat Transfer > Walk > Ride > Bus transfer] • DAY 5 (EXTENSION): Boat transfer > Ride (or walk) > Art Gallery		
SECTIONS DISTANCES	DAY	ACTIVITY	DISTANCE
	1. Lakes Entrance - Nyerimilang	Walk <i>ALT: Paddle + Walk</i>	3km + 5km <i>3.5km + 5km</i>
	2. Nyerimilang – Rigby Island Loop – Nyerimilang	Paddle Walk	9km 1km
	3. Nyerimilang – Metung – Mosquito	Boat transfer	8km

TRAIL #1 – GIPPSLAND LAKES AQUATIC TRAIL - Bullock Island >Port of Sale

	Point – Bunga Arm – Ocean Grange – Ninety Mile Beach – Rotamah	Walk	4km
		ALT: Ride	12km
		Paddle	9.5km
		ALT: Boat Transfer	2.5km
		Walk	6.5km
	4. Rotamah Island – Pt Wilson (Sperm Whale Head) – Loch Sport	Boat Transfer	2.5km
		Walk	17km* *can be shortened to 13km
		ALT: Ride + Walk	19km + 1km walk
		OPTIONAL: Pre-ride Walk	4km loop
		[ALT: Bus transfer]	[24km / 20 mins]
	[ALT > Nunduk Resort]		
	5. ALT Nunduk Resort – Port of Sale	Boat transfer / Ride OR Boat Transfer / Walk OR Boat Transfer only	19km boat transfer + 17km ride OR 30km (total) transfer + 4km walk OR 33.5km boat transfer only
ACCOMMODATION	- Nights 1+2: Nyerimilang > Heritage Park sited Eco-Cabins to south eastern end of Nyerimilang Walk loop [to be developed]/ - ALT: Fraser Island [existing – requires transfer Nyerimilang > Fraser] - Night 3: Rotamah Island Eco-Cabins [to be developed] - Extension Night 4: Loch Sport [private] or Seacombe [new Nunduk spa resort to be built]		

Table 14. TRAIL #1 – DAY #1 - Lakes Entrance - Nyerimilang

TRAIL #1 – DAY #1 - Lakes Entrance - Nyerimilang			
DAY	SECTION	DESCRIPTION	SECTION ISSUES / OPPORTUNITIES
1	Walk 3km + 5km	The trailhead is located at the existing car park and boat ramp area adjacent skate park on western side of Bullock Island Rd (before crossing to Bullock Island). Leading up to the highway, the pathway parallels west along the Princes Hwy, crossing North Arm Bridge, before looping down and away from the highway, into parkland to pick up a footpath that skirts below Mount Barkly to arrive at Kalimna Jetty. Across the water is Rigby island, around which guests will paddle the following day. A NEW proposed rock wall gravel trail continues on west alongside the bank of Lake King until reaching Bancroft Bay. Here, a NEW pedestrian bridge crosses over Bancroft Bay, linking in the Nyerimilang Heritage Park trails, well-known for its heritage homestead along with bush and farm tracks passing Kurrajong trees, wetland areas and through the East Gippsland Indigenous Plant Garden. Guests can choose to walk the inland loop before exploring the homestead and its manicured gardens before looping back cliffside to arrive at the comforts of the Eco-Cain accommodation overlooking Flanagan and Fraser Islands. https://www.parks.vic.gov.au/explore/parks/nyerimilang-park-g.l.r.	Section of walk from Kalimna Jetty to Bancroft Bay does not currently exist. New build required. Best solution is to continue existing rock wall gravel walk from western side of jetty, 600m around the headland to meet new required footbridge site linking across to Nyerimilang. Bridge across Bancroft Bay / Inlet does not currently exist. Could be engineering and environmental impact challenges. Potential resistance from nearby private landholders and/or community. Likely require short boardwalk on northern side of spit. Opportunity to leverage First Nation/Gunaikurnai cultural storytelling at Nyerimilang? <i>This alternative is proposed should the new rock wall gravel trail not be feasible.</i>
	ALT: Paddle 3.5km	<i>Leaving from the same trailhead as the walk route, paddlers will cross to the northern shoreline before following it west, out into the channel separating Rigby's Island from the mainland. Paddling past the Kalimna Jetty and around the headland, it's a gentle entry into Bancroft Bay and a protected, shallow beach landing on the Nyerimilang side.</i>	
	Accommodation	Eco-Cain accommodation Nyerimilang, located on the southern side of the existing pathway, just past the final paddock to the east, and overlooking Flanagan and Fraser Islands. NB: alternative accommodation on Fraser Island (existing) is available, requiring a boat transfer from Nyerimilang Jetty to Fraser Island. https://fraserislandretreat.com.au	Eco-cabins do not currently exist. Best site located on southern side of existing pathway, near location of and across from last paddock to the east. This also has best likely service road access using existing alignments / alongside paddock to the north linking up with Nyerimilang access road. Alternative accommodation on Fraser Island requires boat transfer. Could this be supplied by Fraser Island?

Figure 35. Map Trail #1 -DAY 1



Table 15. TRAIL #1 – DAY #2 - Nyerimilang > Rigby Island Loop > Nyerimilang

TRAIL #1 – DAY #2 - Nyerimilang > Rigby Island Loop > Nyerimilang			
DAY	SECTION	DESCRIPTION	SECTION ISSUES & OPPORTUNITIES
	Paddle 9km	Guests board kayaks back at Bancroft Bay, and with circumnavigation direction TBC according to tidal flow movements, paddle in a loop around Rigby Island. Stops can be taken on the reserve proper, with a halfway stop planned to explore the western wall of The Entrance, the main connection channel between the lakes system and the ocean and a thoroughfare for boats heading out to sea. After exploring The Entrance on foot, guests return to their kayaks for a return paddle to Nyerimilang Jetty and another night's accommodation.	Tidal flows need to be investigated to ascertain risk management, ease of paddling and bet direction for circumnavigation. Query on safe landing/docking site for accessing The Entrance Wall Walk – jetty to the west – is this public or private? Foul weather contingency?
	Walk 1km	A 500m (1km return) walk along the wall of the Entrance rewards with views down wild Ninety Mile Beach, back across to Lakes Entrance and out to sea, along with high chances of spotting local dolphins and seals.	No issues.
	Accommodation	As per Section 1 / Day 1	As per Section 1 / Day 1

Figure 36. MAP Trail #1 - DAY 2



Table 16. Map TRAIL #1 – Day 3 - Nyerimilang – Metung – Mosquito Point – Bunga Arm – Ocean Grange – Ninety Mile Beach – Rotamah

TRAIL #1 – Day #3 - Nyerimilang – Metung – Mosquito Point – Bunga Arm – Ocean Grange – Ninety Mile Beach – Rotamah			
DAY	SECTION	DESCRIPTION	SECTION ISSUES & OPPORTUNITIES
3	Boat Transfer	A morning boat ride transfers guests to the small village of Metung and a quick morning tea, before re-boarding and landing at a public jetty at Mosquito Point, located just across the waterway east from Metung. The partnership opportunity exists to combine a bathing and wellness experience at Metung Hot Springs (currently under development).	Boat operator? Viability? Strong opportunity to partner with Metung Hot Springs with spa and bathing experiences and ultimately the potential for accommodation. Opportunity to engage Metung cafes, bakeries, retail etc.
	Walk 4km	From the jetty, guests follow trails south along the foreshore, across wetlands and into banksia heathland. A leisurely 4km deposits the group to the northern shore of Bunga Arm where kayaks await.	Stairs required down to Bunga Arm water level. Kayak rope off infrastructure required for kayak security.
	Paddle 9.5km	Bunga Arm is known as a paddling beauty spot, fringed with white sand beaches and protected paddling. Along the 9.5km paddle route, lunch is taken at one of the designated campsite locations, before arriving at Ocean Grange, a small settlement located between the lake system and the wild Ninety Mile Beach.	Logistics of kayak delivery TBC. Boat operator? Viability? Site for lunch stop TBC.
	ALT: Ride 12km	From Ocean Grange, Ninety Mile Beach, or optional other activities (Stand Up Paddle Boarding, swimming, birdwatching) For non-paddlers, there is an option to ride the 12km from Mosquito Point along Jubilee Head Track, a gentle, undulating roll through heathland scrub, before popping out at a boat jetty where a ride across Bunga Arm to Ocean Grange awaits.	Foul weather contingency? New boat jetty infrastructure required for picking up bikes.
	Walk 6.5km	From Ocean Grange, it is a short stroll past the village and over the dunes to emerge on the windswept and wild Ninety Mile Beach, which stretches either way as far as the eye can see. The route takes you west along the beach, turning inland after approx. 4km to traverse the sea barrier dune and on to Rotamah Island, a sanctuary famous for its prolific birdlife.	Inland trail route exist for foul (wind) weather. Could be issues with private ownership of land?
	Accommodation	Eco-cabins proposed for Rotamah Island, leveraging existing homestead buildings as communal areas.	Homestead is in disrepair. Question of lease to Birds Australia. Site selection and permits, enviro and cultural considerations should Eco-Cabins be required? Who will invest? Who will manage? Opportunity for interpretation of First Nation/Gunaikurnai history and cultural significance of the island and its wildlife. Requirement to have adjoining public campsites for self-supported visitors.

Figure 37. Map Trail #1 - DAY 3



Table 17. Map TRAIL #1 – Day #4 - Rotamah Island >Pt Wilson (Sperm Whale Head) > Loch Sport

TRAIL #1 – Day #4 - Rotamah Island >Pt Wilson (Sperm Whale Head) > Loch Sport			
DAY	SECTION	DESCRIPTION	SECTION ISSUES
4	Boat Transfer	From Rotamah Island, guests are transported via boat transfer north to Sperm Whale Head and Point Wilson.	Boat operator? Viability?
	Walk 17km* (can be shortened to 13km)	Docking at the public jetty at Point Wilson, guests can take morning tea, engage in some (potential) Gunaikurnai interpretation at the picnic grounds before walking west via a NEW singletrack trail exploring the lakeside environs of Lake Killarney (optional loop to the south) before tracking along the northern coast of Sperm Whale Head. Walkers will enjoy views across to Newlands Arm and Banksia Peninsula before reaching Emu Bight Camp. Further on Pelican Point is a stunning final section before reaching the outskirts of Loch Sport. The final 4km of undulating trail weaves back and forth between beautiful beaches and high viewpoints, before arriving at the Loch Sport Lakeview Bar & Bistro for a celebratory drink. <i>For those who may have ridden the previous day, there is the option to take to two wheels again. After exploring Point Wilson and the eastern fringe of Lake Killarney via a 4.5km loop trail, riders can take the southern shoreline Lake Reeve Track back towards Loch Sport. The easy, undulating ride affords views across to the sea barrier of Ninety Mile Beach, with a short walking break at Lake Reeve Nature Track (1km). It is then an easy roll into the outskirts of sleepy Loch Sport, and on to the Loch Sport Lakeview Bar & Bistro.</i>	New trail (11km) required between Lake Killarney Pelican Point (via Emu Bight Camp). Other sections (roads and access trails existing inland) do not deliver sufficient quality experience. Opportunity for furthering First Nation/Gunaikurnai interpretation at Point Wilson?
	ALT: Ride 19km + Walk 5.5km (total)		
	Transfer or Additional Experience	Guests are transported back to Lakes Entrance via mini-bus or can opt for a potential (NEW) spa wellness retreat experience, staying overnight at Seacombe (resort to be built). Before transferring back to Lakes Entrance the following day / afternoon.	Will Seacombe based Spa and Wellness Resort be built? When? What is offering?

Figure 38. Map Trail #1 – Day 4



GOOGLE MAP: <https://www.google.com/maps/d/u/1/edit?mid=1vMT175hy2r7AniGjY77aLEES1M8Xg-1P&usp=sharing>

Table 18. TRAIL #2 – GIPPSLAND LAKES AQUATIC TRAIL – Loch Sport > Loch Sport

TRAIL #2 – GIPPSLAND LAKES AQUATIC TRAIL – Loch Sport > Loch Sport			
STARTS	Loch Sport		
FINISHES	Loch Sport		
DAYS / NIGHTS	3-5/2-4		
RATING	Easy //Moderate if paddling		
SECTIONS OVERVIEW	• Walk: 1-2 • Paddle: 0-5 • Boat transfer: 2 if no paddling (Pt Wilson > Rotamah > Pt Wilson) • Bus transfer: N/A • Alternatives: options to mix and match walk / ride / paddle legs in various order iterations, unsupported or supported. • Other interactions: Cultural / First Nations		
SECTIONS ITINERARY**	• DAY 1: Loch Sport > Emu Bight Camp • DAY 2: Emu Bight Camp > Pt Wilson > Rotamah • DAY 3: Rotamah > Bunga Arm camp • DAY 4: Bunga Arm camp > Rotamah • DAY 5: Rotamah > Loch Sport ** Note: example of semi-supported itinerary. Itineraries can be customised to level of support, activity preference and day/night trip length)		
SECTIONS DISTANCES (example)	DAY	ACTIVITY	DISTANCE
	1. Loch Sport > Emu Bight Camp	Walk or <i>Paddle</i>	10km / 6km
	2. Emu Bight Camp > Pt Wilson > Rotamah	Walk or <i>Paddle</i> + Paddle or Boat Transfer	8km / 8km + 4km 2.5km
	3. Rotamah > Ocean Grange > Bunga Arm	Paddle <i>Or Walk</i>	8.5-9.5km <i>Or 13km</i>
	4. Bunga arm > Rotamah > Rotamah	Paddle	8.5-9.5km
	5. Rotamah > Pt Wilson > Loch Sport	Boat Transfer or Paddle + Ride <i>Or Paddle</i>	2.5km 19km or 13km
ACCOMMODATION	• Emu Bight Camp [camp] • Bunga Arm campsites https://www.parkstay.vic.gov.au/book-your-stay/gippsland-lakes-coastal-park-bunga-arm • Rotamah Island [Eco-Camp and/or regular camp]		
HIGHLIGHTS	• Excellent Lakes landscapes, protected paddling • Easy-Moderate to undertake yet good sense of wild/remoteness • Birdlife • Gunaikurnai potential interpretation		

Table 19. TRAIL #2 – DAY #1 - Lock Sport > Emu Bight Camp

TRAIL #2 – DAY #1 - Lock Sport > Emu Bight Camp			
DAY	SECTION	DESCRIPTION	SECTION ISSUES / OPPORTUNITIES
1	Walk 10km <i>[ALT: Paddle 6km]</i>	Beginning in the small lakeside village of Loch Sport, at the Lakeview Bar and Bistro, visitors stroll along the trail meandering between the pristine beaches and seaside houses of Loch Sport through tee tree groves. At the Boulevard Boat Ramp, the trail plunges away from town, skirting between the lake waters and a lake before rounding Pelican Headland, past Trouser Bight with views across Lake Victoria, eventually reaching Emu Bight where camp is set just into the hinterland. <i>[As an alternative to walking, paddlers can hop into a kayak at the Boulevard Boat Ramp and paddle north east, around Pelican Point to reach Emu Bight Camp and the first night's rest]</i>	- Trail Loch Sport to Point Pelican is excellent - Trail does exist between Pelican Point and Emu Bight Camp, however, is of lower quality for walking experience and preference is for new trail to be routed to stay generally along the northern shoreline [in keeping with following day's section] - Kayak operator? Hire / guide?
	ACCOMMODATION	EMU BIGHT CAMP - Standard camp at Emu Bight Camp (existing) - Set (supported) camp at Emu Bight Camp (existing)	- Camping facilities at Emu Bight Camp existing are excellent - Easy access for pre-set supported camping

Figure 39. Map Trail #2 - Day 1

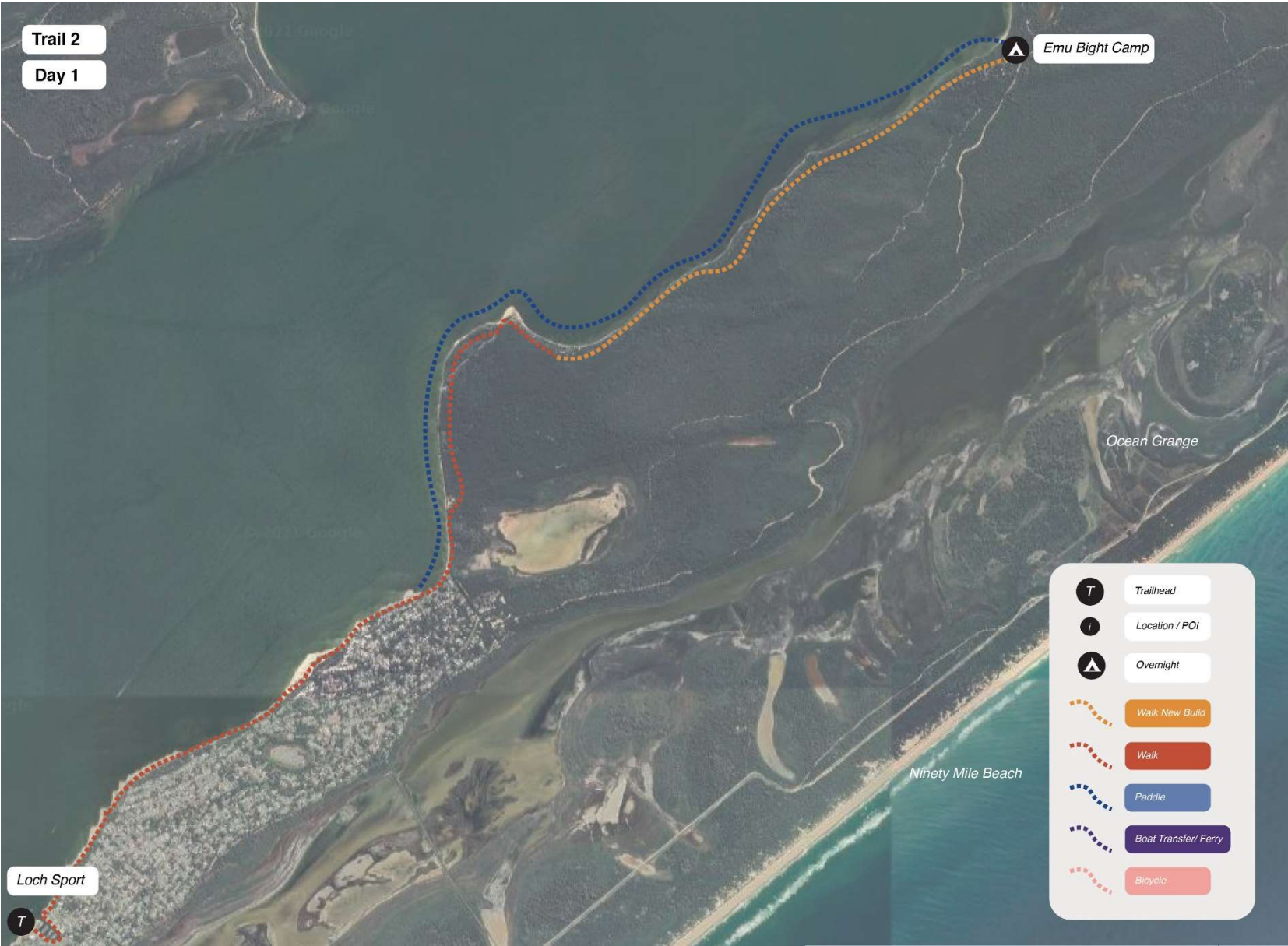


Table 20. TRAIL #2 – DAY 2 - Emu Bight Camp > Pt Wilson > Rotamah

TRAIL #2 – DAY 2 - Emu Bight Camp > Pt Wilson > Rotamah			
DAY	SECTION	DESCRIPTION	SECTION ISSUES & OPPORTUNITIES
2	Walk 8km + Paddle 2.5km <i>[ALT: Paddle 8km + Walk 4km + paddle 2.5km]</i>	Leaving Emu Bight Camp, visitors continue north east along the shore of Sperm Whale Head, potentially stopping for a wild swim at Cherry Tree Beach or Trouser Point, with explorations of Lake Killarney nearing the picnic grounds of Point Wilson. Lunch taken at Pt Wilson, guests electing a paddle experience as part of this itinerary can hop in a kayak and paddle across to Rotamah Island. Those not wishing to paddle can book a water taxi transfer to Rotamah Island. <i>[Paddlers follow the shoreline, also with optional stop-offs at beaches, to Point Wilson Alighting at Pt Wilson on the north eastern tip of Sperm Whale Head, paddling guests can explore the hinterland via a 4km trail looping around Lake Killarney. NOTE: walkers will have already completed this. Paddlers then complete the day's journey by paddling across to Rotamah Island]</i>	• Requires new trail from Emu Bight Camp to Point Wilson • Exposure factor for paddle? • Pt Wilson trail network is of low quality currently. It needs to be wholly revamped and linked up (as part of development for northern shore trail)? • Walkers electing to paddle will require kayak drop off support • Walkers electing not to paddle will require boat transfer
	Accommodation	Eco-camp or public camp at Rotamah Island – refurbishment and new build required.	Site selection and permits, enviro and cultural considerations should Eco-Cabins be required? Need for separate public (regular) camp. Who will invest? Who will manage? Refurbishment of Bird Australia-leased homestead.

Figure 40. Map Trail #2 - Day 2

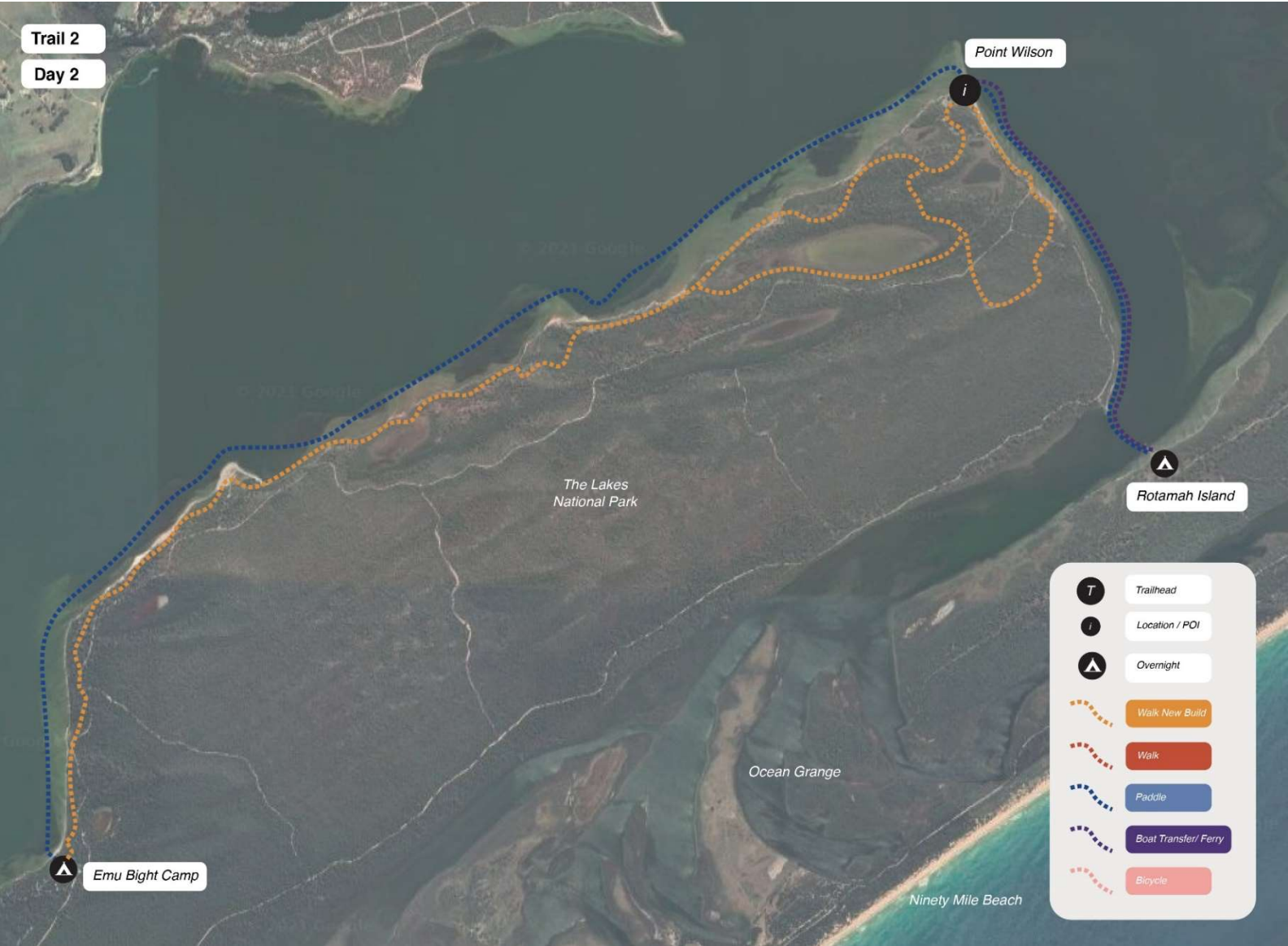


Table 21. TRAIL #2 - DAY 3 - Rotamah > Bunga Arm Camp

TRAIL #2 - DAY 3 - Rotamah > Bunga Arm Camp			
DAY	SECTION	DESCRIPTION	SECTION ISSUES & OPPORTUNITIES
3	Paddle 8.5-9.5km	Rotamah makes the perfect launching point for paddlers of any experience to explore the magnificent Bunga Arm via a stop off at Ocean Grange. Navigate the channels to Ocean Grange while admiring the many rookeries and variety of birds flying overhead. Stop to explore the quaint village of Ocean grange before continuing the paddle north east, exploring the many small and protected beaches on the way to one of seven different paddler campsites.	• Paddle contingency covered by walk route • Opportunity to re-develop homesteads / Bird Observatory into accommodation or cultural interpretation centre • Basic camp required for self-sufficient market in addition to any Eco camp – located away on separate site linked by facilities (sewage, waste etc) • Opportunity to establish First Nation/ Gunaikurnai cultural immersion experience • Quality of walking experience?
	[ALT: Walk 13km]	<i>[ALT: non-paddling walkers can enjoy a wild beach stroll south through wetlands before turning east on trails towards Ocean Grange. Explore the small village and enjoy lunch before heading over the sand dunes to be greeted by the wild Ninety Mile Beach. It's an isolated but captivating walk down the beach before crossing back over and returning through a wetland teeming with birdlife before arriving back at Rotamah camp].</i>	
	Accommodation	Paddlers: at any one of 7-existing paddle-in campsites along Bunga Arm (Parks Victoria – bookable https://www.parkstay.vic.gov.au/book-your-stay/gippsland-lakes-coastal-park-bunga-arm) Walkers: as per Day two at Rotamah camp/s	

Figure 41. Map Trail #2 - DAY 3



Table 22. TRAIL #2 - DAY 4 - Bunga Arm camp > Rotamah

TRAIL #2 - DAY 4 - Bunga Arm camp > Rotamah			
DAY	SECTION	DESCRIPTION	SECTION ISSUES & OPPORTUNITIES
4	Paddle <i>[ALT: non paddler visitors follow Day 5 itinerary as Day 4]</i>	Today's return leg paddle heads back down Bunga Arm, perhaps exploring different islets as you make your way back to Rotamah and camp. <i>[ALT: non paddler visitors follow Day 5 itinerary as Day 4]</i>	N/A
	Accommodation	Rotamah Eco or regular camp as per Day/Night2	Overlapping itineraries of groups in/out at Rotamah

Figure 42. Map Trail #2 - DAY 4

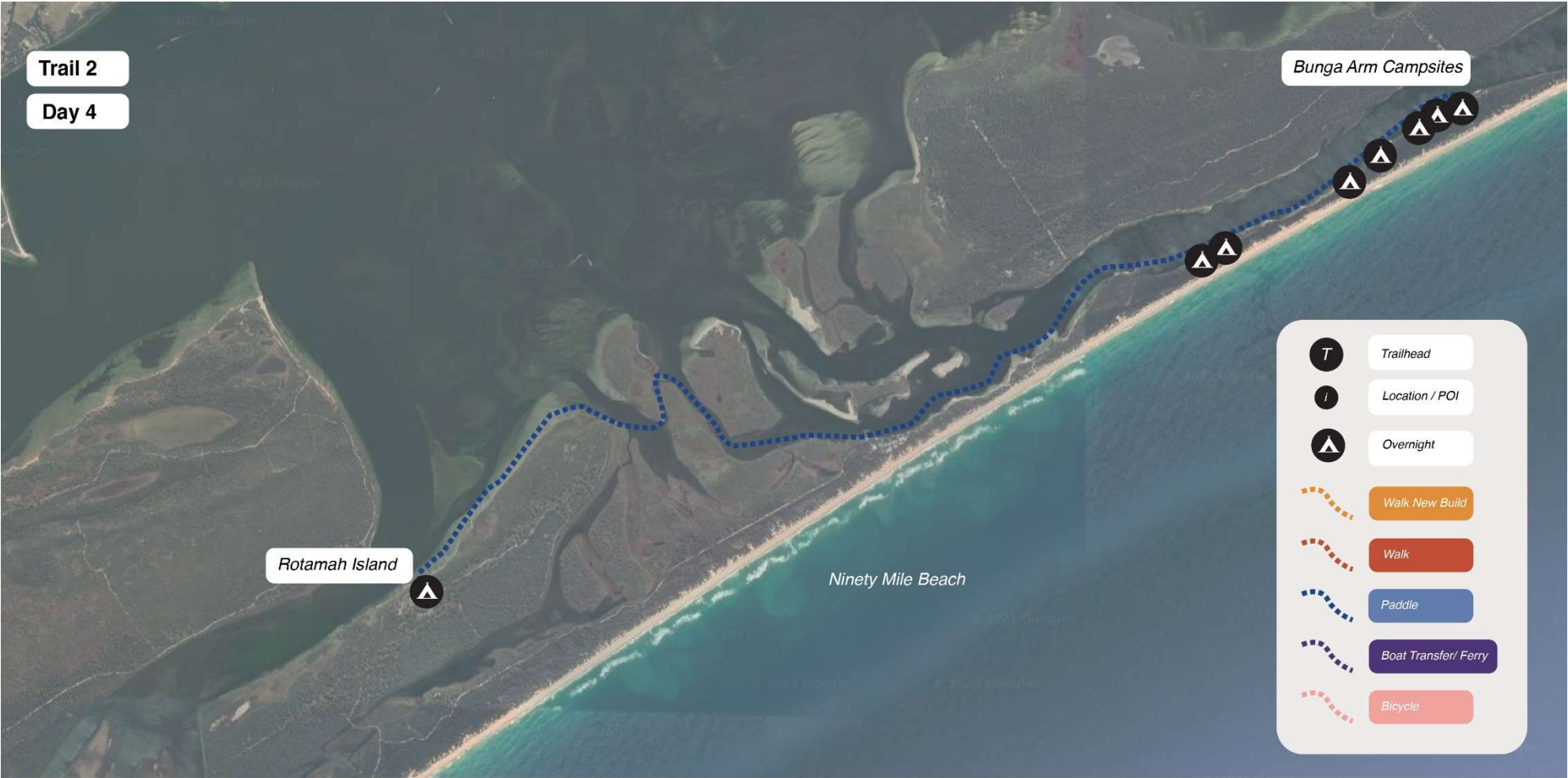


Table 23. TRAIL #2 - DAY #4/5: Rotamah > Loch Sport

TRAIL #2 - DAY #4/5: Rotamah > Loch Sport			
DAY	SECTION	DESCRIPTION	SECTION ISSUES & OPPORTUNITIES
4/5	Water Taxi transfer 2.5km [ALT paddle 2.5km]	<i>Boat transfer from Jetty Observatory pier on Rotamah Island to Point Wilson for morning tea, then link up with the undulating tracks heading south back to Loch Sport, stopping at Lake Reeve Lookout Tower & Nature Walk on the way.</i> [Potential to complete one last, short paddle leg back to Trouser Point (1km) or Point Wilson 2.5km, should water transfer is not preference and/or suits kayak operator logistically re boat pick up (rather than Rotamah Island)]	For potential bike leg: logistics of bike drop off, operator
	Ride 19km [ALT: paddle 13km]	<i>With a morning tea complete at Point Wilson, bikes are on site and ready to be ridden along the Lake Reeve Track, on the southern shoreline of Sperm Whale Head. A stop off at the Lake Reeve Lookout and Nature Walk stretches the legs before the final push back into Loch Sport, and a terminus to quench the thirst at the Loch Sport Bar & Bistro. **Should riders prefer to stay off road, it is possible to ride most of the singletrack on the northern shore from Boulevard Boat Ramp.</i> [ALT: The final leg of the Sperm Whale Head paddling-centric circumnavigation journeys south along the narrow channels of Lake Reeve, the dunes to the south keeping paddlers protected from Bass Strait. Explore a myriad of inlets and beaches enroute, before docking on the rear side of Loch Sport.	- Bike operator required to deposit bikes at Pt Wilson. Alternative connection with group at Trouser Point for shorter ride. - Logistics of kayak operator pick up of boats. - Is paddling down channels on southern side of Loch Sport feasible?
	Accommodation	N/A – tour finish, or Loch Sport accommodation via commercial channels. Option for a potential (NEW) spa wellness retreat experience, staying overnight at Seacombe (resort to be built).	Will Seacombe based Spa and Wellness Resort be built? When? What is offering?

Figure 43. Map Trail #2 - DAY 5

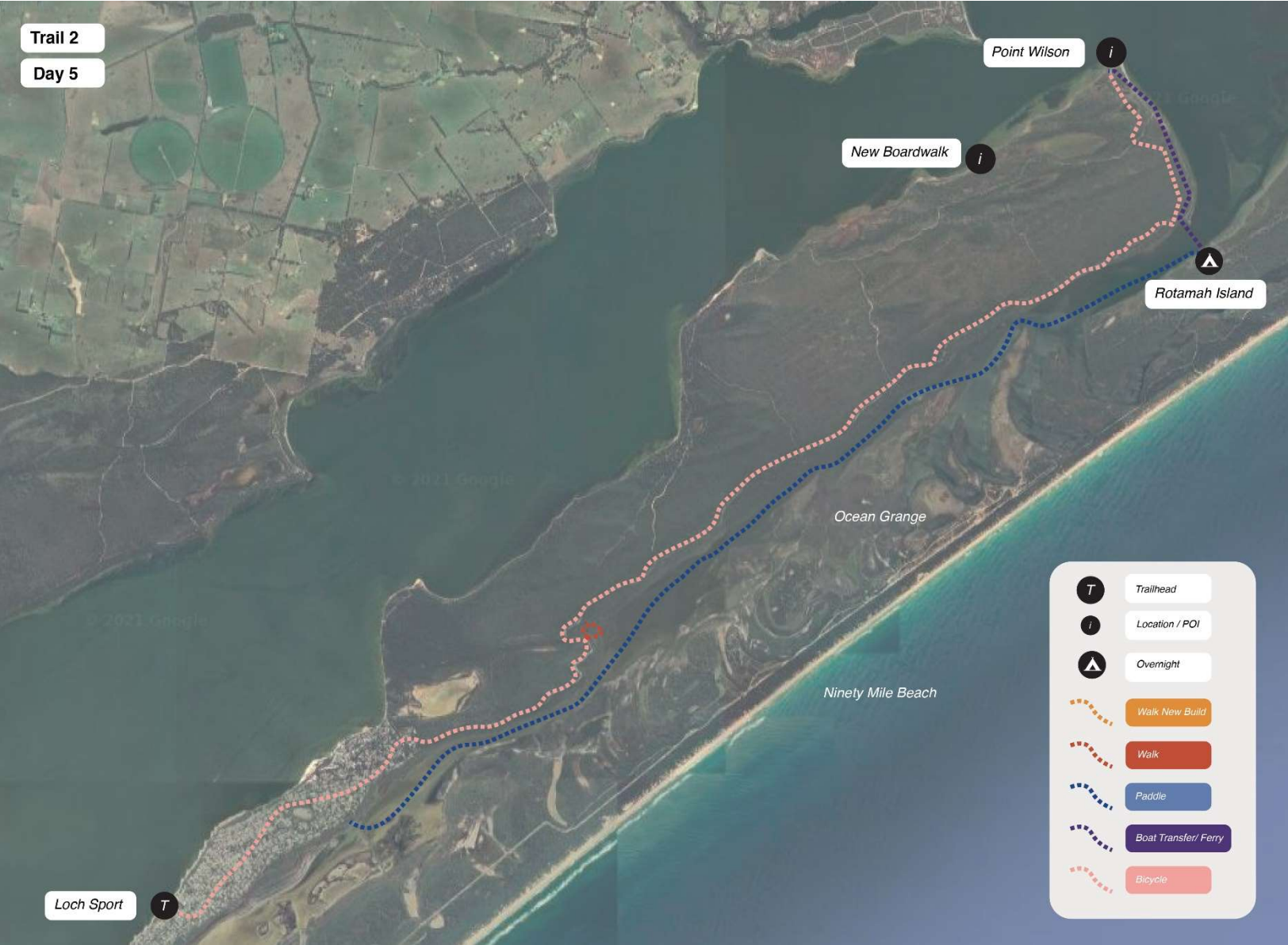


Table 24. TRAIL #3 – GIPPSLAND LAKES AQUATIC TRAIL – LAKES ENTRANCE > LAKES ENTRANCE

GOOGLE MAP: https://www.google.com/maps/d/u/1/edit?mid=1TyPMfc_4CF5HY6O5JtpjCrQxyfwrcba_&usp=sharing

TRAIL #3 – GIPPSLAND LAKES AQUATIC TRAIL – LAKES ENTRANCE > LAKES ENTRANCE			
STARTS	Lakes Entrance		
FINISHES	Lakes Entrance		
DAYS / NIGHTS	4/3 +		
RATING	Moderate		
SECTIONS OVERVIEW	• Ride: 1 (+ potential MTB parks x 2) • Paddle: 2 • Walk: 1 • Optional add-ons: Stand Up Paddle Board, Art Gallery / Sculpture Walk		
SECTIONS ITINERARY	• DAY 1: Lakes Entrance > Nowa Nowa • DAY 2: Nowa Nowa > Camerons Arm Camp • DAY 3: Camerons Arm Camp > Glasshouse Camp > Lake Tyers Beach • DAY 4: Lake Tyers Beach > Lakes Entrance		
SECTIONS DISTANCES	DAY	ACTIVITY	DISTANCE
	1. Lakes Entrance > Nowa Nowa	Ride + potential SUP	30km (easy riding)
	2. Nowa Nowa > Camerons Arm Camp	Paddle (+ potential MTB in AM)	10km
	3. Camerons Arm Camp > Glasshouse Camp > Lake Tyers Beach	Paddle	12km
	4. Lake Tyers Beach > Lakes Entrance	Walk	10-11km
ACCOMMODATION	• Nowa Nowa – commercial options including tavern, caravan park. • Camerons Arm Camp – campsite. Option for Eco-Camp? • Lake Tyers Beach - Caravan Park and motel		
HIGHLIGHTS	• Only trail to merge into ‘moderate’ level of adventure • Only trail to feature significant and quality cycling – both rail trail and MTB parks • Leverages existing tourism infrastructure (rail trails / MTB parks / sculpture walk) • Major Gunaikurnai interaction / potential to highlight and further develop Bung Yarnda/Lake Tyers Mission • Only river-based aquatic trail • Leverages Nowa Nowa / Lake Tyers • Excellent for self-sufficient, camping or accommodation based		

Table 25. TRAIL #3 – DAY #1 – Lakes Entrance > Nowa Nowa

TRAIL #3 – DAY #1 – Lakes Entrance > Nowa Nowa			
DAY	SECTION	DESCRIPTION	SECTION ISSUES / OPPORTUNITIES
1	Ride 30km	Beginning at the Forestec / Gunaikurnai Information Centre, riders can choose to take a singletrack technical route through the Colquhoun MTB Park, or use nearby non-technical forestry trails to reach the 24km Gippsland Lakes Discovery Trail From here it's a 100% rail trail experience that undulates, with a few short sharp inclines, through bushland following an old tramway following the Mississippi Creek. Riders will see remains of old cuttings, including rail and sleepers and old marble quarry along the way. Meeting the East Gippsland Rail Trail, riders turn right pointing the front wheel towards Nowa Nowa, approx. 16km to the east. This is a mostly flat and easy ride, including past the impressive Stony Creek Trestle Bridge built in 1916 and at 247m long and 20m high, the largest standing bridge of its kind in the State. Arriving at the small riverside village of Nowa Nowa, visitors can choose to rest up and hydrate at the local tavern, or explore further the local Sculpture Walk, a myriad of artist's home galleries, take a SUP paddle up the impressive Nowa Nowa Gorge or enjoy more singletrack thrills found in the extensive MTB Park.	• Access to Colquhoun MTB Park excellent for MTB riders, inclusive easy loop off-back on Discovery trail • Most riding is 'easy', especially once on East Gippsland Rail Trail (flat) • Potential to leverage Nowa Nowa's tourism infrastructure and offerings, accomm, artist galleries etc. • Potential to establish SUP rental for creek paddling Nowa Nowa Gorge upstream • Leverage Sculpture Walk • Leverage Nowa Nowa MTB Trails • All trails existing NOTE: <i>Lake Tyers State Park Camping and Access Strategy</i> consultations are live - this may have relevancy.
	Accommodation	Nowa Nowa • commercial options including tavern, caravan parks	

Figure 44. Map Trail #3 - DAY 1

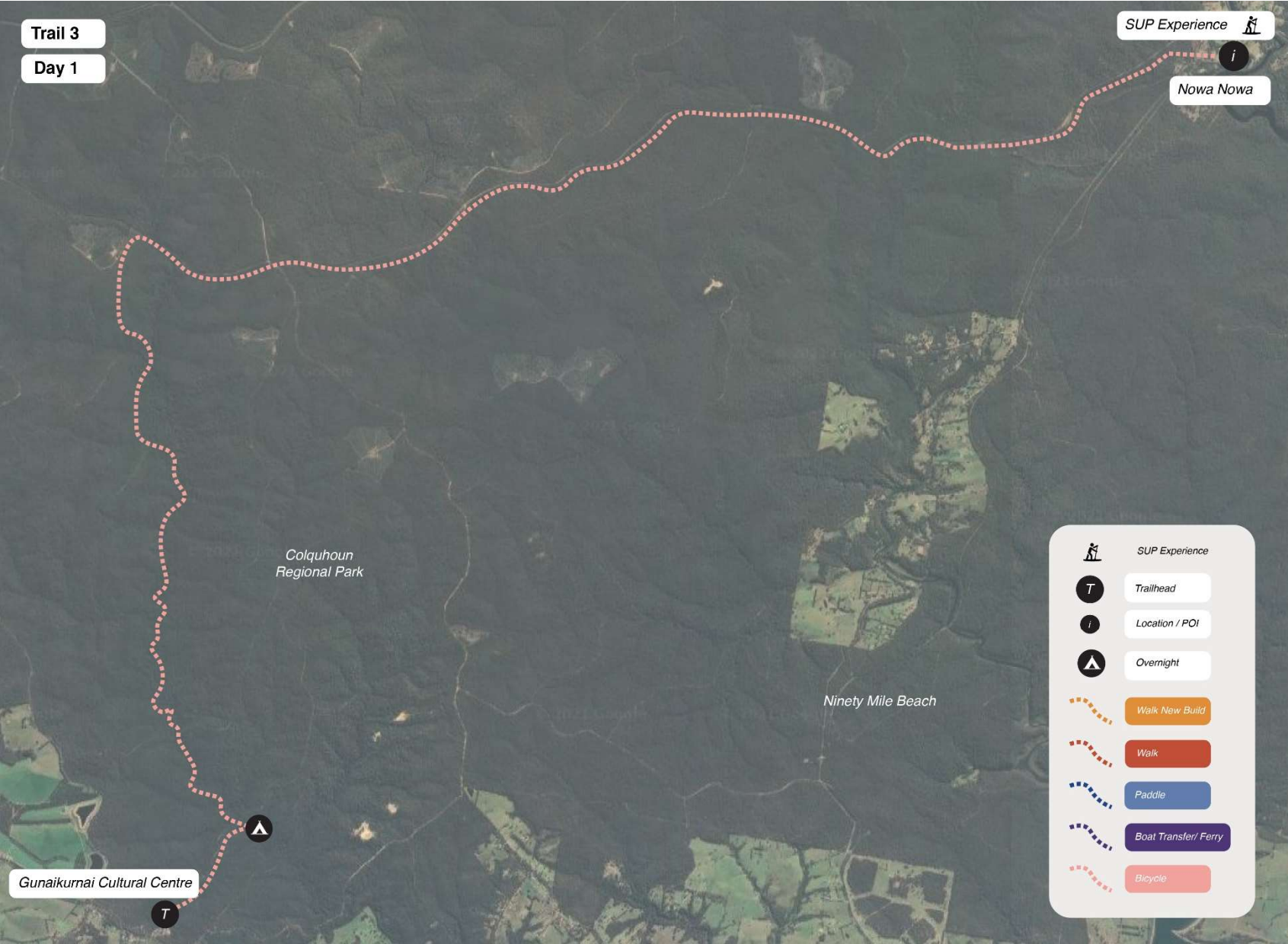


Table 26. TRAIL #3 – DAY #2 – Nowa Nowa > Camerons Arm Camp

TRAIL #3 – DAY #2 – Nowa Nowa > Camerons Arm Camp			
DAY	SECTION	DESCRIPTION	SECTION ISSUES & OPPORTUNITIES
2	Paddle 10km	Day two is all about paddling as kayak bows are pointed downstream along Boggy Creek which feeds into Lake Tyers proper. The winding tributary passes great stands of forest. After exploring the nooks and crannies, watching the wildlife and potentially stopping for a wild swim, paddlers alight at Camerons Arm Camp for a night's camp (facilities). Potential for establishing new Eco-Camping – although <i>Lake Tyers State Park Camping and Access Strategy</i> in play. *This overnight can be skipped with paddlers moving further downstream direct to Lake Tyers Beach. Or if in long term cultural accommodation established at Lake Tyers Mission.	NOTE: <i>Lake Tyers State Park Camping and Access Strategy</i> consultations are live - this will have relevancy.
	Accommodation	Camerons Arm Camp	Any potential for an Eco-Camp?

Figure 45. Map Trail #3 - DAY 2

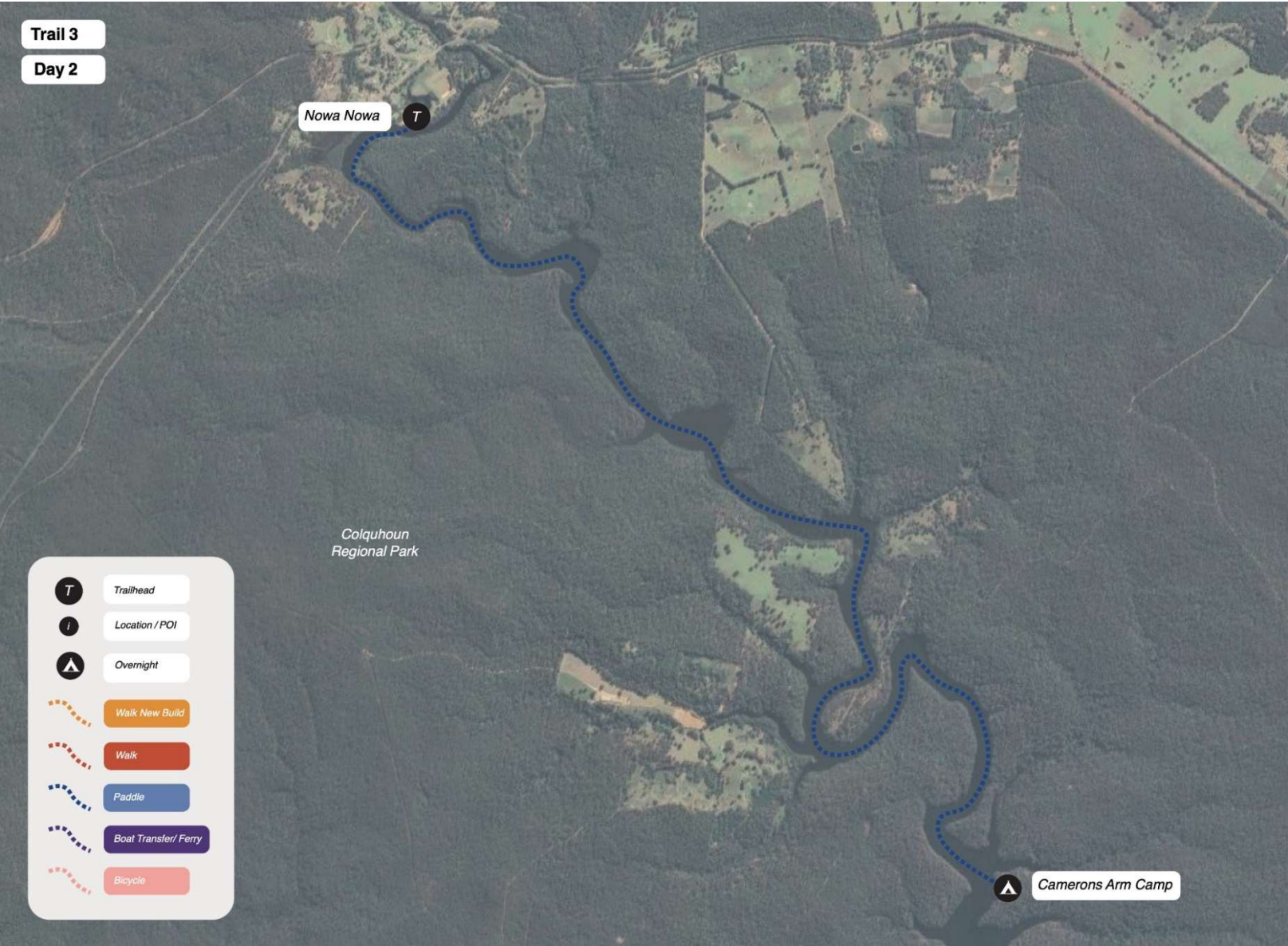


Table 27. TRAIL #3 – DAY #3 - Camerons Arm Camp > Glasshouse Camp > Lake Tyers Beach

TRAIL #3 – DAY #3 - Camerons Arm Camp > Glasshouse Camp > Lake Tyers Beach			
DAY	SECTION	DESCRIPTION	SECTION ISSUES & OPPORTUNITIES
3	Paddle 12km	Paddlers move on from the overnight camp, paddling further downstream, stopping off at Glasshouse to look at the ruins before pointing the bow across the Lake to Lake Tyers Beach. LONG TERM CONSIDERATION	Feasibility of developing experiences, interpretation, integrations with Bung Yarnda / Lake Tyers Mission community? LONG TERM CONSIDERATION
	First Nations Experience LONG TERM CONSIDERATION	Cultural experience with Gunaikurnai at Bung Yarnda – also known as Lake Tyers Mission and the Lake Tyers Aboriginal Corporation.	What experience can be designed by Gunaikurnai at Bung Yarnda? What exists? How can it be further developed?
	Accommodation	- Glasshouse Camp – campsite. Option for Eco-Camp? - Lake Tyers Beach - Caravan Park and motel. *is there / could there be any accommodation at Lake Tyers Aboriginal Trust, final night stay with ceremony?	

Figure 46. Map Trail #3 - DAY 3

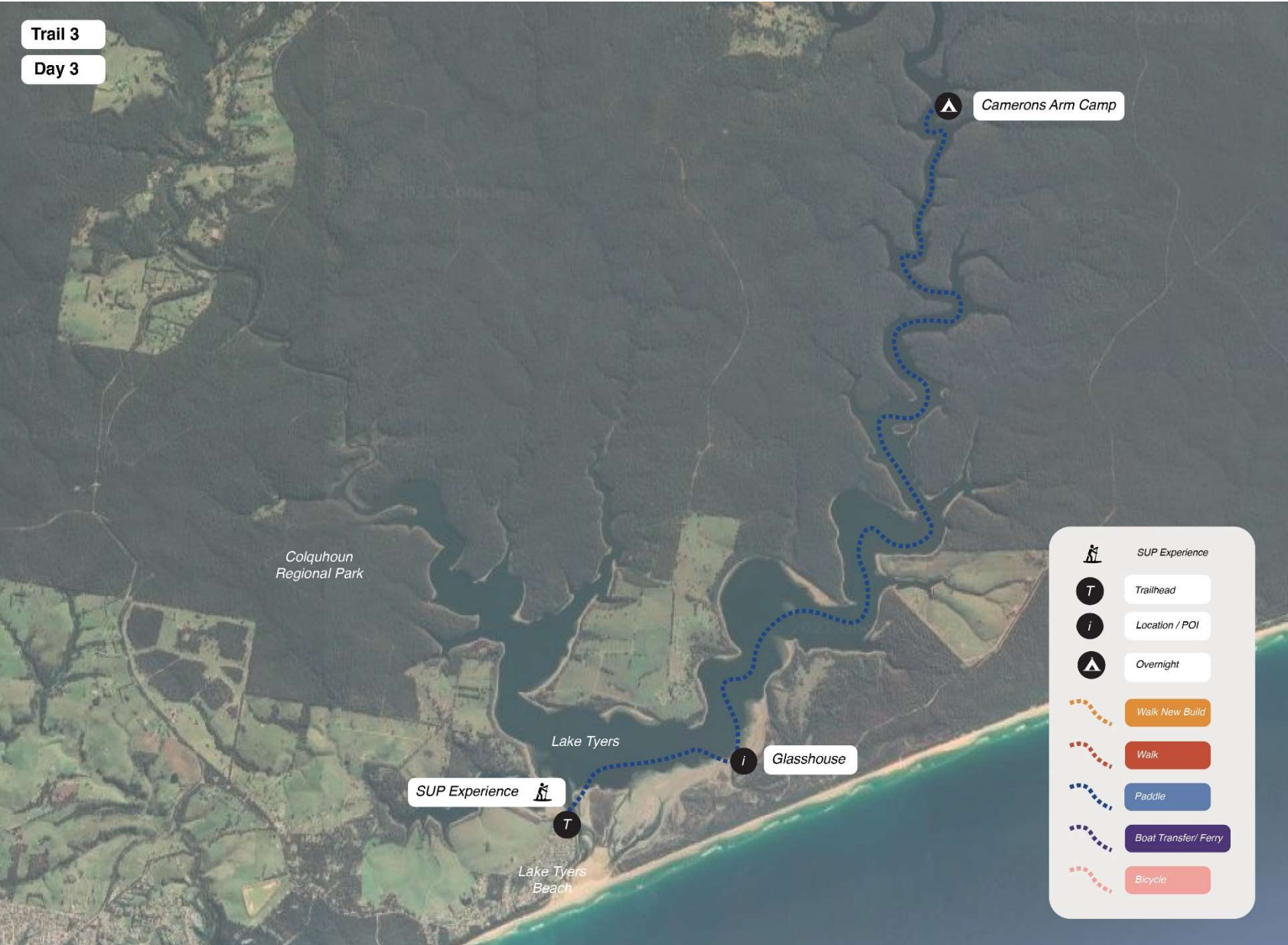


Table 28. TRAIL #3 – DAY #4 - Lake Tyers Beach > Lakes Entrance

TRAIL #3 – DAY #4 - Lake Tyers Beach > Lakes Entrance			
DAY	SECTION	DESCRIPTION	SECTION ISSUES & OPPORTUNITIES
4	Walk 10km	A 10km walk traces the wild shoreline and Red Bluff. The walk starts out accessing the beach at Lake Tyers Beach, before rising to join trails at Salmon Rd and across to Red Bluff Surf Beach. From here, trails access clifftop hinterland, however a NEW trail / access will need to be established safely and within environmental tolerances to drop walkers back down to Lake Bunga. Walkers then cross the permanent sand spit for a wild beach walk south west towards Lakes Entrance. Walkers can choose to turn inland at the Lions Park (Hummocks Rd) to then pick up footpaths all the way back into Lakes Entrance, or continue on in fair weather along the beach, to access Lakes Entrance via the Main Beach Walk bridge. An extension can be gained by walking all the way to The Entrance and looping back on the northern side of the sand dunes to the footbridge and Lakes Entrance.	• Section of trail at Red Bluff – safely traversed when tide is low to mid. Not passable higher than mid-tide. • All tide / weather option picks up existing trails to stay high but requires forging trail down to shores of Lake Bunga at some point (500m + stairs). A location has been identified where informal steps and rails already exist (needs professional infrastructure).

Figure 47. Map Trail #3 – Day 4



GOOGLE MAP: <https://www.google.com/maps/d/u/1/edit?mid=1SIPTQH0ne6qLxjYukGeafTAyxbmJWZZE&usp=sharing>

Table 29. TRAIL #4 – GIPPSLAND AQUATIC TRAIL – PORT OF SALE > PORT OF SALE

TRAIL #4 – GIPPSLAND AQUATIC TRAIL – PORT OF SALE > PORT OF SALE			
STARTS	Port of Sale		
FINISHES	Port of Sale		
DAYS / NIGHTS	2/1 (could extend to 3/2 or equally be a day trip)		
RATING	Easy		
SECTIONS OVERVIEW	• Paddle: 1 • Boat transfer: 1-2 • Walk: 1 • Ride: 1 • Gunaikurnai Cultural Experience: 1 • Extension: Art Gallery visit.		
SECTIONS ITINERARY	• DAY 1: Sale > Heart Morass Wildlife > Lake Wellington > Nunduk Spa Retreat (should it be built and operational) • DAY 2: Nunduk Spa Retreat > Heart Morass Wildlife > Sale		
SECTIONS DISTANCES	DAY	ACTIVITY	DISTANCE
	1. Sale > Swing Bridge	Boat Transfer or kayak	4.5km
	1. Swing Bridge > Sale Common > Swingbridge	Walk <i>*point to point short walk requires boat drop off earlier at Thompson River confluence, pick up at Swing Bridge /</i>	4km (point to point) Or 7km (loop)

TRAIL #4 – GIPPSLAND AQUATIC TRAIL – PORT OF SALE > PORT OF SALE

		<i>Latrobe Wharf</i>	
	1. Swing Bridge > Heart Morass Wildlife Reserve	Boat transfer or kayak	10km
	1. Heart Morass Wildlife Reserve > Lake Wellington > Nunduk Spa Retreat	Boat Transfer	19km
	2. Nunduk Spa Retreat > Heart Morass Wildlife Reserve > Port Sale	<i>Boat transfer + Ride</i>	19km boat transfer + 17km ride
ACCOMMODATION	Sale		
HIGHLIGHTS	• Explorations on foot and by bike of Bataluk Cultural Trail landscapes • Heritage boat cruise / historical nodes (i.e. Swing Bridge) • Paddling Latrobe River • Heart Morass Wildlife reserve • Gunaikurnai cultural inclusions		

10.3.2 DAY 1:

Table 30. TRAIL #4 – DAY #1 - Sale > Heart Morass Wildlife > Lake Wellington > (Nunduk should it be constructed).

TRAIL #4 – DAY #1 - Sale > Heart Morass Wildlife > Lake Wellington > (Nunduk should it be constructed).

Note – this route is under consideration by Gunaikurnai as a possible cultural experience and this proposal will need to align with the outcomes of the GLaWAC considerations to avoid duplication.

DAY	SECTION	DESCRIPTION	SECTION ISSUES & OPPORTUNITIES
1	Paddle or Boat transfer yard 1.5km + Walk	Leaving the Historic Port of Sale on the historic Rubeena (1912), visitors are introduced to the history and ecology of Sale and the riverway. A new boat landing at the old boat building yards drops boat trip visitors off for a 4km point to point meander through the Sale Wetlands, enjoying boardwalks and birdlife before arriving at the historic Swingbridge. Paddlers can undertake a loop walk of 7km, returning to the landing before setting off back downstream to the Swingbridge site.	NEW boat landing required at old ship building yard. Could create new picnic area with more historical interpretation. Creates good loop experience opportunities.
	Paddle or Boat transfer 10km	From the Swingbridge it is a gentle flat on boat or paddle by kayak alongside the wetland environs that have been lovingly restored by to their former glory, attracting a myriad of birdlife. A stop off at a new boat landing allows visitor to edge over the riverbank and get a bigger glimpse of the wetlands.	Requires new boat landing and interpretation at a suitable site along the Latrobe. Issues using boat ramp at eastern end of Heart Morass, as would require trail build / boardwalk for Day 2 return leg bike section. Possible if deemed better option than building new boat landing.
	Boat transfer	After enjoying the Heart Morass environs, it's back on the boat to transfer to the new Nunduk Spar and Wellness Retreat for a night of pampering and fine food. Paddlers can arrange to have their vessel picked up here, or if keen, continue on paddling noting it is a big day with another 19km to go across the more exposed waters of Lake Wellington.	Likely timing of new Spa Resort unknown. No other accommodation option at that end. Possible to create a pick-up zone for visitors to return to Sale for accommodation and/or operate as a one-day loop, with bikes dropped at Heart Morass for return ride journey (19km).

Figure 48. Map Trail #4 – Day 1



Figure 49. TRAIL #4 – DAY #2 - Nunduk Spa Retreat > Heart Morass Wildlife > Sale

TRAIL #4 – DAY #2 - Nunduk Spa Retreat > Heart Morass Wildlife > Sale			
DAY	SECTION	DESCRIPTION	SECTION ISSUES & OPPORTUNITIES
2	Boat Transfer 19km + Ride 17km	After a morning massage (perhaps) and a hearty breakfast, a boat transfer will take visitors back to Heart Morass where bikes will be waiting for the final ride back in to the Port of Sale via the trails of Sale Wetlands. A final stop at the Sale Art Gallery awaits.	Bike route as mapped is good. Should it be deemed reasonable to extend to the existing Heart of Morass Boat Ramp (for boat berthing), new trail will need to be built across some land that does experience inundation (approx. 1.5km).

Figure 50. Map Trail #4 – Day 2



APPENDIX B. Infrastructure review

TRAIL #1: HERO TRAIL: LAKES ENTRANCE to LOCH SPORT via NYERIMILANG > METUNG > BUNGA ARM > OCEAN GRANGE > PT WILSON (SPERM WHALE HEAD) > LOCH SPORT

LEG	DAY	ACTIVITY	DISTANCE	CURRENT INFRASTRUCTURE / MATERIALS	REQUIRED WORKS	OTHER INFRASTRUCTURE REQUIRED	ESTIMATED COSTS
1	1	Walk Lakes Entrance > Nyerimilang	8km	- Good rock wall gravel trail to Kalimna Jetty - No trail Kalimna Jetty to Bancroft Bay - No bridge access across Bancroft Bay - Good condition gravel and dirt trails at Nyerimilang. Existing jetty at western end.	650m rock wall trail	Pedestrian bridge 70-80m Boardwalk approx. 20-40m	500m @ \$2,000 per lineal metre = \$1,000,000. (Note the value of this could be split between community and the project) – PLUS Bridge at \$100,000 over the creek. – TOTAL \$1.1 million pre contingency – and include other works – say \$1.3 million.
1 ALT	1 ALT	Paddle Lakes Entrance > Nyerimilang	3.5km	- N/A - open water paddle. Replaces walk should trail thoroughfare / bridge is not feasible. - LAUNCH - existing site serves requirements - LANDING – sand landing.	N/A	Potential kayak tethering poles at landing	Some clearing work and minor infrastructure – say \$10,000 per site x 2 sites = \$20,000. Add in kayak storage areas – say \$50,000 – TOTAL \$70,000
1	1	ACCOMMODATION (Nights 1 + 2 optional) Nyerimilang	N/A	N/A - site only	Full design/construction of eco-camp accommodation	Sewerage, water, power	10 eco pods, plus communal facilities, plus infrastructure (off-grid micro systems), plus track work plus – allow \$4,000,000
2	2	Paddle (optional) Nyerimilang > Rigby's Island > The Entrance > Nyerimilang	9km	- N/A - open water paddle. LAUNCH – sandy bar at Bancroft Bay. - LANDING – Drews Jetty for walk to The Entrance - LANDING – pier at Nyerimilang for boat transfer.	Adapting pier at Nyerimilang for kayak disembarkation Adapting Jetty at Drews Jetty for kayak disembarkation	N/A	Minor works to Nyerimilang Jetty area for kayak stowage (or back towards the beach near the new bridge), plus some kayak storage areas – allow \$100,000

TRAIL #1: HERO TRAIL: LAKES ENTRANCE to LOCH SPORT via NYERIMILANG > METUNG > BUNGA ARM > OCEAN GRANGE > PT WILSON (SPERM WHALE HEAD) > LOCH SPORT

3	2 or 3	Boat Transfer Nyerimilang > Metung > Mosquito Point	8km	- LAUNCH – pier at Nyerimilang - LANDING – piers at Metung and Mosquito Point	None	N/A	No costs – public access jetty infrastructure used at all three locations (Nyerimilang, Meeting and Silvershot Jetty)
4	2 or 3	Walk Mosquito Point > Bunga Arm	4km	Existing access track. Sand and dirt.	Minor upgrade (clean and grade)	Stairs at Bunga Arm down to kayak landing site.	Track works - including signs and some interpretation along the route – allow \$100,000 Bridge- put in place gate arrangement to allow walkers over the bridge midway – allow \$15,000 Stairs at Bunga Arm – including kayak launching ramp and kayak tie down / storage points - \$30,000 TOTAL Cost Estimate - \$145,000
4 ALT	2 or 3 ALT	Ride ALT Mosquito Point > Bunga Arm	12km	Existing access track. Sand and dirt.	Upgrade, especially western end. Clean and grade, potentially topping.	Boat jetty at Bunga Arm terminus	This is more problematic as we need people to be able to put their bike on a boat – suggest a ramp – as water levels fluctuate – rather than a jetty which is more difficult to achieve. Track works – say \$100,000 Bike egress and access in Bunga Arm – say \$30,000 TOTAL ESTIMATE - \$130,000
5	2 or 3	Paddle Bunga Arm > Ocean Grange	9.5km	- N/A - Launch - sandy beach at Bunga Arm - LANDING - sandy beach at Ocean Grange.	N/A	Kayak tethering infrastructure	Minor works here – we have allowed for the kayak launching at Bunga above – so it is really only exiting at Ocean Grange. Kayak Tie points - \$10,000
5 ALT	2 or 3 ALT	Boat Transfer Bunga Arm > Ocean Grange	2.5km	- None at Bunga Arm - Boat jetty at Ocean Grange	New boat jetty at Bunga Arm	Stairs to trailhead	Suggest ramp arrangement with people taking their shoes off to get wet (perhaps knee deep) to climb on board the boat transfer. Cost – Minimal – \$10,000 A jetty could cost \$100,000
5	2 or 3	Walk Ocean Grange > Rotamah	6.5km	- Dirt + sand trails - Beach	None	None	Signage – allow \$5,000

TRAIL #1: HERO TRAIL: LAKES ENTRANCE to LOCH SPORT via NYERIMILANG > METUNG > BUNGA ARM > OCEAN GRANGE > PT WILSON (SPERM WHALE HEAD) > LOCH SPORT

5	2 or 3	ACCOMMODATION Night 2 or 3 Rotamah	N/A	N/A site only. Rotamah House repurposed for eco camp	Full design/construction of eco-camp accommodation + adjacent general camp area	Sewerage, water, power	10 eco pods – plus some site works, communal facilities – say \$2,000,000 Refurbishment of the Homestead as a group facility – say \$750,000 – \$3million recommended estimate
6	3 or 4	Boat Transfer Ocean Grange > Pt Wilson	2.5km	- LAUNCH – jetty existing - LANDING – jetty existing	None	None	None
7	3 or 4	Walk Pt Wilson > Loch Sport	17km	Trail does not exist (short section at Point Wilson end as part of lake network exists, but average to poor condition. Requires upgrades)	11km new trail 5km (approx.) of trail upgrade / refurb for Point Wilson trail network	Potential boardwalk x2	New Build trail – say \$30 per metre – including sand management and track clearing (native veg offsets) - \$3.3 million Contingency and refurbishment of existing sections – say \$1 million TOTAL - \$4.3 million
7	3 or 4	Ride Pt Wilson > Loch Sport <i>*Include short lakes loop walk prior to ride.</i>	19km	- Graded dirt road, good gravel grind surface. - Bitumen road in Loch Sport (or gravel/dirt pathway if diverting to singletrack on north shore)	None	Bike racks at Bistro	Allows \$5,000 inclusive of signage

TRAIL #2: LOCH SPORT TO LOCH SPORT VIA EMU BIGHT CAMP, PT WILSON, BUNGA ARM

LEG	DAY	ACTIVITY	DISTANCE	CURRENT INFRASTRUCTURE / MATERIALS	REQUIRED WORKS	OTHER INFRASTRUCTURE REQUIRED	ESTIMATED COSTS
1	1	Walk Loch Sport > Emu Bight Camp	10km	- Trail does not exist *as per required for Trail#1	3.5km new trail *part of 17km (total) as per required for Trail#1	Stairs (potential – requires survey new ground) *as per required for Trail#1	<i>We allowed \$3.3 million for new build trail – of that – say \$1 million is for this section.</i>
1 ALT	1 ALT	Paddle Loch Sport > Emu Bight Camp	6km	- LAUNCH: boat ramp / sand beach - LANDING: sand beach	None	None	None
2	2	Walk Emu Bight Camp > Pt Wilson > Rotamah	8km + 2.5km (boat)	- Trail does not exist *as per required for Trail#1	7.5km new trail *part of 17km as per required for Trail#	Stairs (potential – requires survey new ground) *as per required for Trail#1	As above - \$2 million for new trail
2 ALT	2 ALT	Paddle Emu Bight Camp > Pt Wilson > Rotamah	8km + 2.5km	- LAUNCH: sand beach - LANDING: sand beach	None	None	None
3	3	Paddle Rotamah > Bunga Arm	8.5-9.5km	- LAUNCH: sand beach - LANDING: sand beach	None	None	None
3 ALT	3 ALT	Walk Rotamah > Ocean Grange > Rotamah	13km	- Dirt and sand trails - Beach	None	None	None
4	4	Paddle Bunga Arm - Rotamah	8.5-9.5km	- LAUNCH: sand beach - LANDING: sand beach	None	None	None
4 ALT	4 ALT	Follow 5 below	Follow 5 below	Follow 5 below	Follow 5 below	Follow 5 below	Follow 5 below
5	5	Boat Transfer or Paddle Rotamah > Pt Wilson	2.5km	- LAUNCH: jetty or sand beach - LANDING: jetty or sand beach	None	None	None
6	5	Ride Pt Wilson - Loch Sport	19km	- Graded dirt road, good gravel grind surface. - Bitumen road in Loch Sport (or gravel/dirt pathway if diverting to singletrack on north shore)	None	Bike racks at Bistro	Allowed \$5,000 in trail 1

TRAIL #2: LOCH SPORT TO LOCH SPORT VIA EMU BIGHT CAMP, PT WILSON, BUNGA ARM

6 ALT	5 ALT	Paddle Pt Wilson - Loch Sport	13km	- LAUNCH: sand beach - LANDING: sand beach / causeway	None	None	None
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TRAIL #3: LAKES ENTRANCE to LAKES ENTRANCE via NOWA NOWA

LEG	DAY	ACTIVITY	DISTANCE	CURRENT INFRASTRUCTURE / MATERIALS	REQUIRED WORKS	OTHER INFRASTRUCTURE REQUIRED	ESTIMATED COSTS
1	1	Ride Forestec / Gunaikurnai Information Centre > Nowa Nowa via Discovery Trail and East Gippsland Rail Trail	30km	- Dirt singletrack existing - Compacted gravel rail trail existing - Compacted gravel rail trail existing	None	None	None
2	2	Paddle Nowa Nowa > Camerons Arm Campsite	10km	- LAUNCH: dirt boat ramp / low river bank - LANDING: dirt boat ramp / low river bank - Campsite: 3 fire pits, 3 picnic tables	None	Toilets	Including micro system (or pump out) and toilet block - \$100,000
3	3	Paddle Camerons Arm Campsite > Lake Tyers Beach	12km	- LAUNCH: dirt boat ramp / low river bank - LANDING: town boat ramp / low river bank / sand beach	None	None	None
4	4	Walk Lake Tyers Beach > Lakes Entrance	10km	Compacted gravel and dirt trail. Sand beach, Concrete pathway	500-600m new trail	Stairs approx. 40m total descent	Allow \$200,000 for trail construction (to a high standard) and \$40,000 for the stairs

TRAIL #4: PORT OF SALE to PORT OF SALE via

LEG	DAY	ACTIVITY	DISTANCE	CURRENT INFRASTRUCTURE / MATERIALS	REQUIRED WORKS	OTHER INFRASTRUCTURE REQUIRED	ESTIMATED COSTS
1	1	Boat transfer Port of Sale > Boat Building Yard	1.5km	- Historical boat in operation - LAUNCH: Port of Sale - LANDING: none	Boat jetty or similar at old shipbuilding yards	Potential picnic tables etc at Old shipbuilding yards	Significant jetty build – estimate of \$150,000 Picnic facilities include tables, chairs – say \$20,000
1 ALT	1 ALT	Paddle Port of Sale > Boat Building Yard	1.5km	- LAUNCH: Port of Sale low jetty - LANDING: none	Landing boat jetty with low landing	Potential picnic tables etc at Old shipbuilding yards	As above \$170,000 in total
2	1	Walk Boat Building Yard > Swingbridge	4km	Gravel and dirt trails, wooden boardwalks	Upgrade boardwalks	Toilets at Swingbridge (potential)	Toilets at Swingbridge will be problematic with use by the general public / vandalism etc Boardwalk upgrade – say \$250,000 Toilets – say \$250,000 TOTAL \$500,000
2 ALT	1 ALT	Walk Boat Building Yard > Boat Building Yard	7km	Gravel and dirt trails, wooden boardwalks	Upgrade boardwalks	None	Boardwalk upgrade – suggest \$250,000
3	1	Boat Transfer Swingbridge > Heart Morass new landing	10km	- LAUNCH: existing jetty incl low launch - LANDING: none	LANDING: New jetty with low landing required	Toilet (?)	Jetty construction (flood proof) – estimate \$200,000 Toilet estimate (sealed and contained system due to flooding) - \$150,000
3 ALT	1 ALT	Paddle Boat Building Yard > Swingbridge > Heart Morass new landing	14km	- LAUNCH: none - LANDING: none	LAUNCH: New launch jetty with low landing required LANDING : New launch jetty with low landing required	Toilet (?)	Heart Morass Jetty – as above – estimate \$200,000 Toilets estimate as above - \$150,000
4	1	Boat Transfer Heart Morass new landing > Nunduk Spa and Wellness retreat	19km	- LAUNCH: none - LANDING: none	LAUNCH: New launch jetty with low landing required LANDING : New launch jetty with low landing required	None	Heart Morass covered above – Nunduk – suggest leave as the new owner operators can construct when they are ready. – Otherwise allow \$100,000
5	2	Boat Transfer Nunduk Spa and Wellness retreat > Heart Morass new landing	19km	- LAUNCH: none - LANDING: none	LAUNCH: New launch jetty with low landing required LANDING : New launch jetty with low landing required	None	As above- Heart Morass - \$200,000 and leave out Nunduk
6	2	Ride Heart Morass new landing > Port of Sale	17km	Gravel, grass, and bitumen vehicular track	Trail upgrades at eastern end of trail including surfacing	None	Upgrading 2km of trail to a high standard – say \$50,000

APPENDIX C. Maps of Planning Zones

Figure 51. Lake National Park Zoning

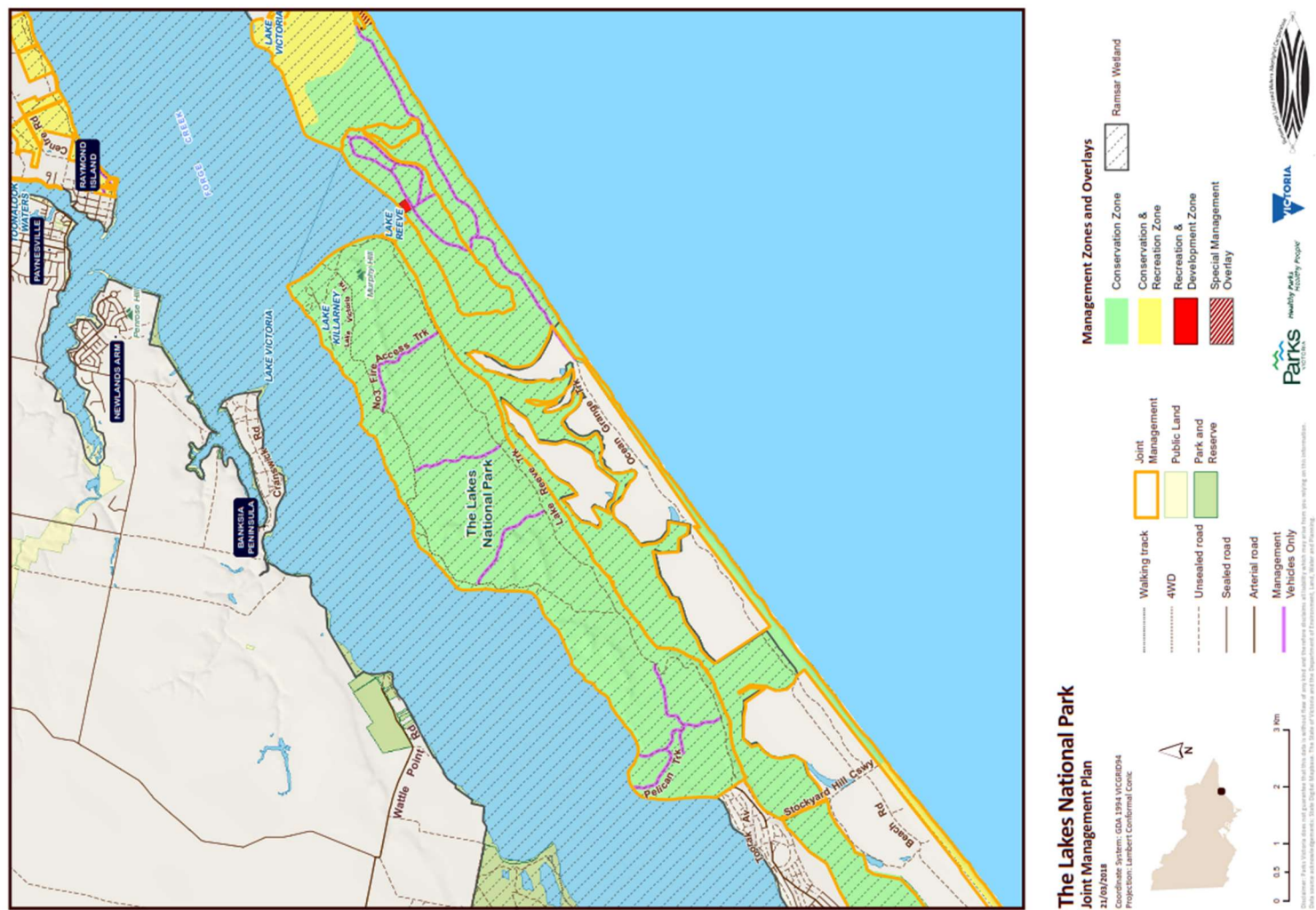


Figure 52. Gippsland Lakes Coastal Park Zones S1

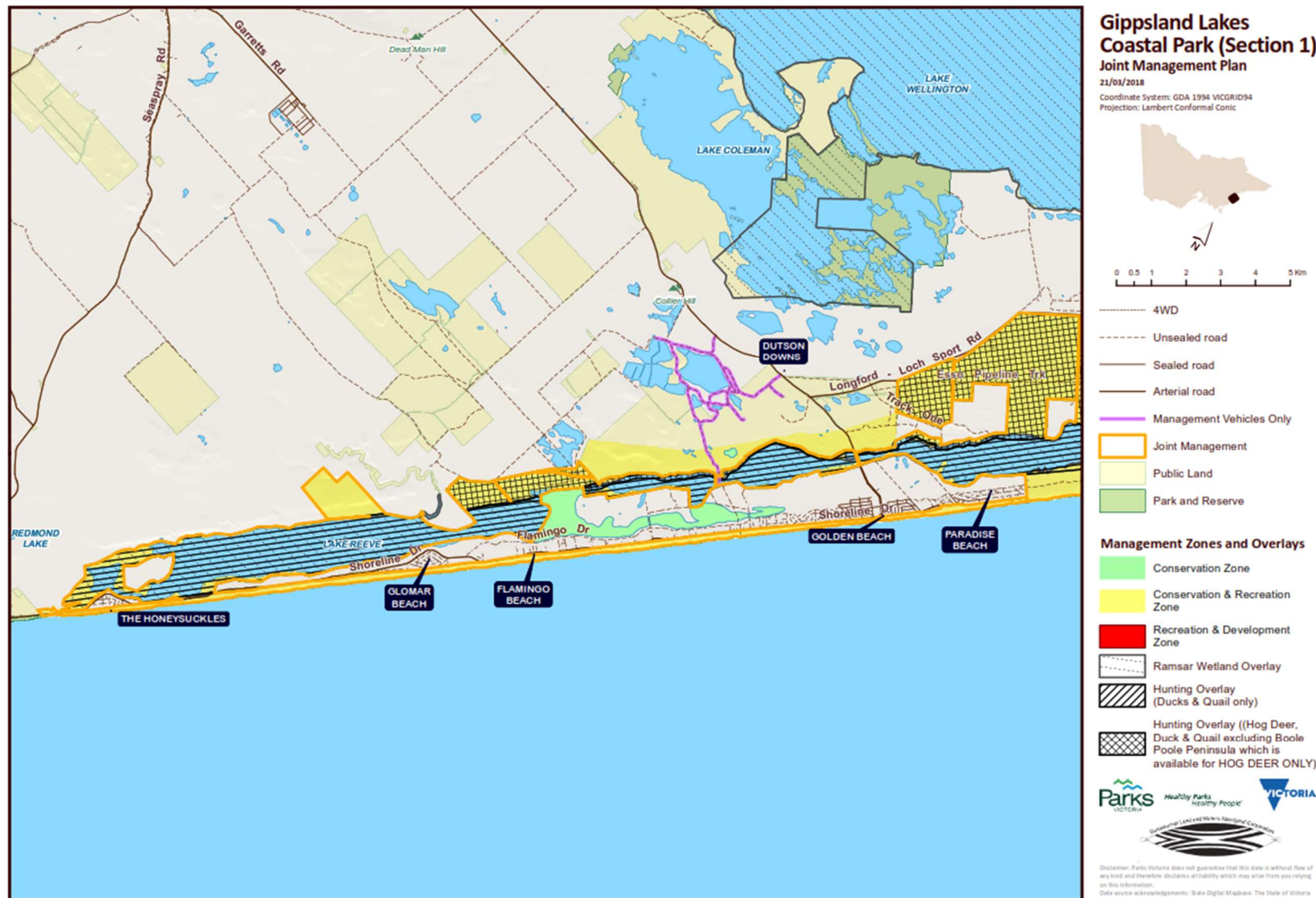


Figure 53. Gippsland Lakes Coastal Park Zones S2

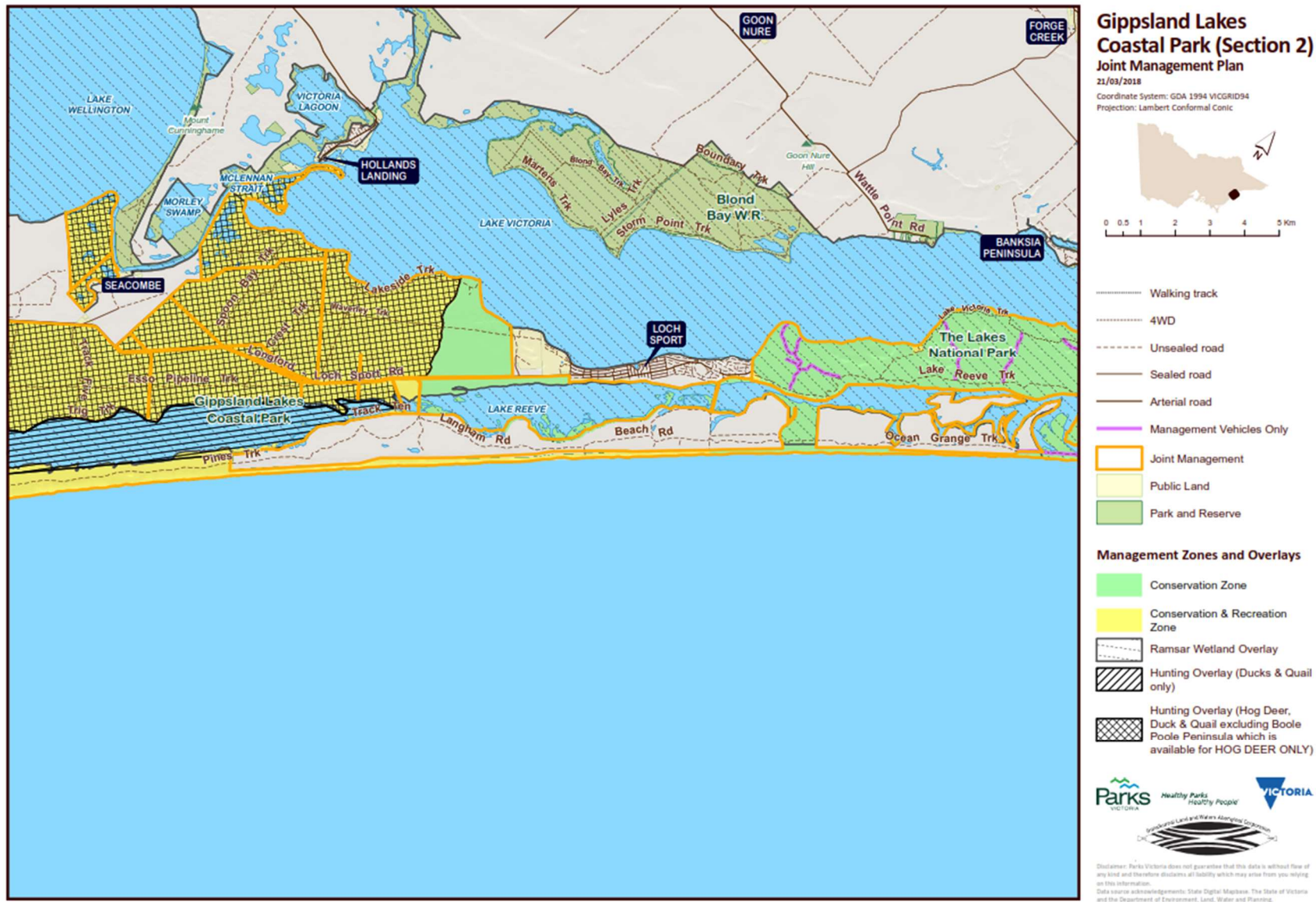
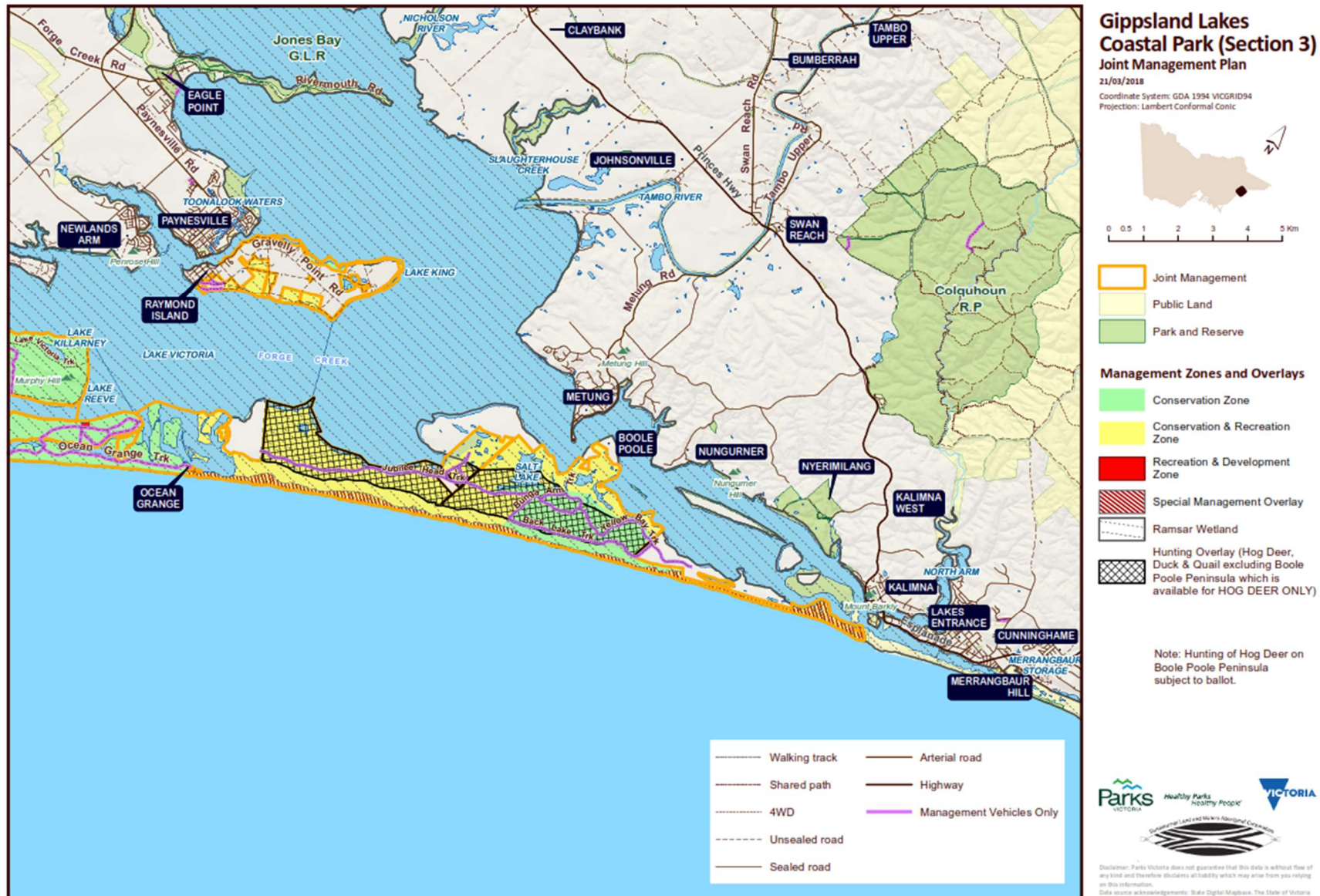


Figure 54. Gippsland Lakes Coastal Park Zones S3



APPENDIX D. MARKET TRENDS

The Global Walking Market

The World Travel and Tourism Committee (WTTC) identifies walking and outdoor adventure as one of the high value tourism sectors showing strong growth. Supporting this, the United Nations World Tourism Organisation (UNWTO) estimates the outdoor adventure sector has doubled in size in the past five years. The top adventure activities are hiking, cycling, safaris, culinary activities, and wellness-focused activities, with high end custom itineraries remaining high in consumer demand.

- Majority of adventure tour companies (83%) stated that their 2018 gross revenues surpassed their 2017 gross revenues.
- Clients of adventure tour operators are largely between the ages of 51-70 (43%).
- Adventure tourism, in particular 'soft adventure' tourism such as walking, is not only a growth sector but a major contributor to well-being, the sharing of economic benefits to more remote areas, and building awareness of the environment and the importance of environmental protection.

There is a growing trend towards 'destination' walks, where a single location becomes the primary reason for travel to a country (e.g. The Camino Way, Overland Track and Three Capes).

Specific to C2C however, like the Great Ocean Walk, Margaret River is the destination, with the C2C one of the experiences within that destination.

Other Trail Trends

- Women's adventure – there is an increasing number of women's walking tours and events as an opportunity for friendship groups, female family members and solo women to walk safely together for wellbeing, empowerment and socialisation.
- Wellness - health and well-being market is continuing to experience significant growth and is the fastest growing segment for Great Walks
- Active families – particularly attractive for city families as a safe, active, fun and educational experiences outdoors in nature.
- Active retirees (55+ market) – active retirees seeking more than a 'grey nomad' holiday
- Transformational travel – an opportunity to celebrate a life change or milestone such as a 50th birthday, change of personal circumstances (beating a serious illness, divorce, children leaving home) – these visitors are seeking an experience that encourages personal reflection and change.

Eco And Nature-Based Accommodation and Experiences

Nature-based tourism can be defined as sustainable tourism activity or experience that relates to the natural environment, whether for relaxation, discovery or adventure. Nature-based Tourism can include a range of activities including cycling, water-based activities, bushwalking, fishing, visiting botanical or other public gardens, state and national parks and other outdoor and adventure activities.

Ecotourism is a niche segment within the broader category of **nature-based** and sustainable tourism. The ecotourism segment of consumers and experiences are those that seek to enhance a nature-based experience with both sustainable operating practices and engaging interpretation of the natural and cultural landscape. This educational element, mixed with sustainable practices, is what separates ecotourism from nature-based and mainstream sustainable tourism. It engages and informs visitors and is managed to be ecologically, economically and socially sustainable by contributing to the wellbeing of the natural areas and local communities where they operate.

In relation to accommodation, Ecotourism Australia defines ecotourism as ‘ecologically sustainable tourism with a primary focus on experiencing natural’ i.e. the accommodation has a clear and firm relationship with its surroundings.

A study conducted by Nielson Holdings in 2019 on ecotourism revealed that ecotourism experiences are today a core focus of travel. Findings within the Study included:

- More than 2.2 million Australians (1 in 10) intend to partake in ecotourism in the next 12 months, both within and outside of Australia
- Ecotourists tend to be younger travellers (72% under the age of 45) which aligns with the growth in the uptake of great walks for the 40-50 year old market
- Ecotourists are generally travelling as a couple (40%), with similar statistics for other travel types including groups (23%), families (19%) and solos (18%)
- People intending to take ecotours are highly educated with 30% having an undergraduate or higher degree
- Environmental and social responsibility are important considerations of purchase by ecotourists
- 72% of travellers would like companies to tell them more about how they are making a positive difference to society so they can support them
- Sustainability is of great focus for Australians, with 68 percent of Australians acknowledging that they are concerned for the environment, while travellers are becoming more aware of the impacts of their actions on the environment.¹⁸

This growth of interest in ecotourism has sustained a strong demand for appropriately located eco-accommodation in the Australian marketplace. While a range of accommodation types are commonplace, consumer uptake has been very much driven by glamping products and experiences which range from the classic bell tent to builds on concrete pads of stilts/short piles, and more innovative styles such as transparent ‘bubble tents’.

There has also been a boom in modular designs, many of which can be best described as semi-permanent or demountable. Designs often have Scandinavian minimalist markers, with “getting away from it all/ getting back to nature” at the heart of their selling propositions.¹⁹ An overview of the types of eco-accommodation is provided in Table below.

¹⁸ <https://www.nielsen.com/au/en/insights/article/2019/eco-tourism-is-not-just-for-greenies/>

¹⁹ Earthcheck Report on potential trends relevant to the C2C experience 2020

DIRT ART MTB SURVEY 2016

2 average number of mountain bikes owned



35-44 years most common age of mountain bike riders



\$1,000 TO \$3,000 amount spent on bicycles and equipment each year

2 - 3

average rides per week



1-2 hrs

average amount of time per ride

26.6%

travel for ten minutes to what they consider to be their 'local trails'

37.28%

travel to another state once a year to ride



\$30-\$60

spent on food and drink per trip



\$100- \$150

spent on accommodation and an evening meal when traveling to a destination to ride

6 days

average length of trip by 34.45% of riders when mountain biking was primary purpose of trip



\$4,167

average spend annually on mountain biking travel



USD 15.42 billion

E-BIKES

value of global e-bike market in 2019, and it is expected to register 6.21% - predicted e-bike market growth during 2020-2025

10,000 – 15,000



e-bikes sold in Australia in 2017, twice more than sold in 2016

KAYAKING - AUSTRALIA



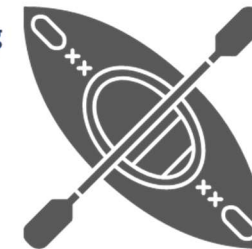
What do participants seek from engaging in paddling?

- 51%** keeping fit and healthy
- 17%** driver for their involvement
- 12%** friendship and social interaction
- 6%** skill development
- 42%** ONLY paddled for recreation
- 42%** mix of paddling for recreation, training and competition

Connections between paddling community and other outdoor recreation pursuits and activities.

Members asked about 'other sport or recreation activities they participate in' with the following being the top five activities:

- 55%** Cycling / mountain bike riding
- 32%** Hiking / bush walking
- 32%** Running
- 27%** Swimming
- 23%** Camping



SOURCES:

SportAus' AusPlay survey results for 2019
<https://bushwalkingvictoria.org.au/about-us>
 Participation in Exercise, Recreation and Sport Survey 2010 annual report
 DIRT ART MTB Survey 2016
 Monitor Intelligence E-Bike Market 2020-2025, Executive Summary
<http://www.mtbiking.com.au/news/bike-price-rises-off-table-as-tariff-appeal-fall>
 Tourism Research Australia, National Visitor Survey, International Visitors in Australia, domestic visitor profiles
 Canoe Victoria's Strategic Facilities Plan 2015-30 /

Nature based context

In Australia, the nature-based tourism sector contributes an estimated \$23 billion to the economy each year.²⁰ Australia is one of the leading providers of nature-based tourism, with a diverse range of ecosystems, landscapes and wildlife, many of which are found nowhere else in the world.

Gippsland’s substantial tourism economy is underpinned by an abundance of unique visitor experiences, from food and hospitality opportunities to nature-based attractions like the Gippsland Lakes, Wilson’s Promontory, the Australian Alps and Croajingolong National Park.

World-class produce and natural settings make the region unrivalled as a space where the city meets the country. More than 65% of Gippsland is state-owned forests and parks, making nature-based tourism one of the most expansive industry sectors in the region.²¹

Tourism Australia’s Consumer Demand Project (April 2020)²² found that safety and security, value for money and world class nature and wildlife are the most important drivers for destination choice to Australian travellers. While 66% of Australian travellers travelled within their state of residency, 34% travelled to another state. Domestic travellers stay an average of 4 nights and spend approximately \$687 per trip.

This Demand Project ranks awareness of Australian destinations with experiences such as nature/wildlife and aquatic/coastal. Compared to other Australia destinations, the Gippsland region does not register as being a destination of high awareness for these specific experiences.

²⁰ BDA Marketing Planning 2015 (Activating Nature-based Tourism in SA – Govt of SA)
²¹ <https://www.hitechgippsland.com/business/tourism/>

In Victoria, nature-based visitors represent 19% of all visitors to Victoria, and 22% of all visitors to regional Victoria, making up 76.9 million visitor nights in the state.

The Market

Visitor total	18.8 million +17%
International overnight visitors	2.2 million +1%
Domestic overnight visitor	7.0 million +20%
Domestic day visitor	9.6 million +18%



²² Tourism Australia Fact Sheet April 2020

Greater Gippsland Visitor Economy

Many of the figure below represent pre COVID- 19 pandemic figures, as the resultant data is either not yet available, or is impacted significantly through the various State border closures, and the lock down that occurred during 2020.

The Greater Gippsland sub-regions (mostly corresponding to LGA areas) include East Gippsland, Wellington, Latrobe, Baw Baw, South Gippsland and Wonthaggi-Inverloch. Figures below are for travel to the Greater Gippsland region and its sub-regions, year ending March 2020 – all travellers.²³

FIGURE 1: TOURISM VISITORS

	7,287,000 up 3.2% on last year	76,000 International Overnight	-17.9%
		2,637,000 Domestic Overnight	+6.1%
		4,575,000 Domestic Daytrip	+2.0%
		12.4% share of regional Victoria	+0.2%
Tourism Nights			
	8,443,000 up 8.8% on last year	713,000 International Night	-7.1%
		7,730,000 Domestic Nights	+10.5%
		13.9% share of regional Victoria	No change

²³ <https://www.visitgippsland.com.au/resources/travel-to-the-greater-gippsland-region-and-its-sub-regions-year-ending-march-20>

Features of the Gippsland nature-based traveller (visitors)

An indication of participation in nature-based activities by visitors is provided by data from Tourism Research Australia. In this instance nature-based activities include:

- visit national/ state parks; visit botanic or other public gardens
- whale or dolphin watching
- bushwalking or on a rainforest walk
- scuba diving
- snorkelling and visit wildlife parks / zoos / aquariums.

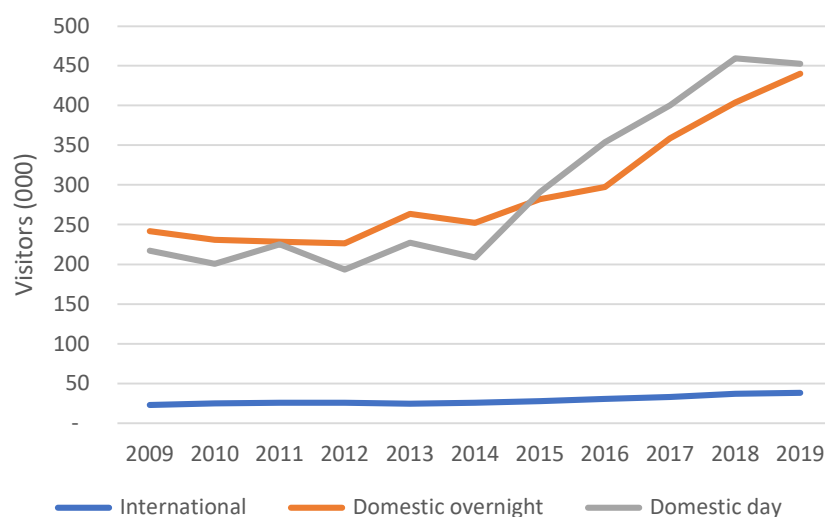
Data is based on 4 year averages from year ending 2009 to 2019.²⁴ See Figure 26.

²⁴ TRA Year ending December 2009 to Year ending December 2019, 4 year averages

Trends in Gippsland Nature Based Visitors

- International nature-based visitors have shown a steady increase since 2009, growing from a base of 23,000 in 2009 to 38,000 in 2019 (4 yr. averages) – noting these are pre COVID- 19 pandemic figures.
- Domestic overnight visitors indicate a steady increase year on year, growing from a base of 242,000 in 2009, to 440,000 in 2019. In the last year of these figures, there was an increase of 9% in nature based domestic overnight visitors to the region. The state indicated a 13.5% increase in the last year of these figures.
- Domestic day visitors to the region rose from between 2014 (209,000) to 2018 (459,000), though showed a slight drop to 452,000 in 2019. This drop does not mirror the same trend for the state of Victoria for 2019, that showed a 14% increase over the same period (2019).
- Regional comparisons – nature-based visitors - in 2019, the Gippsland region attracted 10% of the nature based (domestic overnight) visitors to regional Victoria (excludes Melbourne).

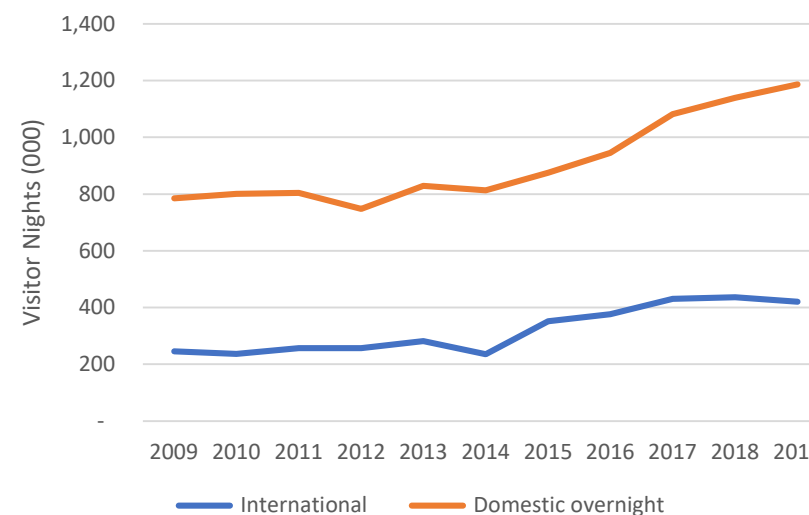
Figure 1. Gippsland Nature Based Visitors – 4-year averages



Trends in Gippsland Nature Based Nights

- International nature-based visitors nights showed a steady increase from 2014 (236,000) to 2018 (436,000), though a drop of close to 4% is shown for 2019 (4 yr. averages). International visitation is close to non-existent at the time of writing this business case and is expected to remain subdued or non-existent for some years to come.
- Domestic overnight visitors indicate a steady increase year on year, growing from a base of 785,000 in 2009, to 1,187,000 in 2019. In the last year, there was an increase of 4% in nature based domestic nights to the region. The state indicated a 11% increase in the same period (2019).
- Regional comparisons – nature-based traveller nights - in 2019, the Gippsland region attracted 9% of the nature-based nights (domestic overnight) to regional Victoria (excludes Melbourne).

Figure 2. Gippsland Nature Based Visitor Nights – 4 year averages



Adventure Tourism

Adventure tourism is defined as “a trip that takes an individual outside of his or her regular environment for more than 24 hours, and includes participation in a physical activity, a visit to a natural environment and/or a culturally immersive experience.” It includes nature-based tourism, sports tourism and culture and heritage tourism.

For consumers, the ‘road less travelled’ (both in terms of places visited and novelty of experience) is the overall defining factor of adventure travel.

The market is large, and growing, though the soft adventure (camping, canoeing, hiking, sailing, fishing etc) market is both the largest and the greatest overall driver of future growth. Overall it is anticipated that Asia Pacific will have the fastest growth adventure tourism market with Allied Market Research forecasting that inbound travel to the region will grow by 19% between 2017 and 2023. Australia is ranked 7th in the world (developed countries) for growth potential.²⁵

The global adventure tourism market - of which hiking, biking, aquatic and water-based tourism are a significant component - was valued at \$86.3 billion in 2018, and is projected to reach \$1,626.7 billion in 2026, registering a compound annual growth rate of 13.3% from 2019 to 2026.²⁶

Figure 55. Adventure Tourism



Both men and women are equally likely to be adventure travellers, but they travel differently. Men are more likely to travel independently, whereas small group touring for women has grown. In all cases, women are more likely to be the travel organiser and final decision makers. They tend to be higher income travellers. The largest age group is in its peak earning years with 40% aged 30-41, though noting is attitude rather than age that drives adventure travel.



30% travel with their families, including children. Intrepid has noted a rise in both multi-generation and ‘skip generation’ (grandparents travelling with grandkids) on its adventure tours. In total, it estimates booking of family travel grew by 16% in 2017.



Engaging content is critical and must demonstrate both the experience and your corporate values. Digital sources and word of mouth are key.



Motivating adventure travellers in Australia is recharging (tired, stressed) 51%, naturally curious and like going to new places (19%), turning another year older, birthdays (11%), sharing something fun with family and friends on social media (8%), challenging myself e.g., climb a mountain (6%), a break up (4%).

²⁵ www.mytravelresearch.com Understanding the Adventure Travel Market Report 2018

²⁶ <https://www.alliedmarketresearch.com/adventure-tourism-market>

Cultural tourism

According to the Australian Council for the Arts' *'Domestic Arts Tourism: Connecting to Country'* report:

"There is a willingness to travel to destinations beyond capital cities to seek new and authentic experiences, including growing engagement with First Nations arts and craft – diverse expressions of the world's oldest continuing living culture. Australians are connected through these experiences by building our community wellbeing, cultural identity and social cohesion, while supporting local and regional economies."

"First Nations arts and craft are a strong and growing area of domestic arts tourism. First Nations arts tourism is increasing, reflecting Australians' strong and growing interest in engaging with First Nations arts for their beauty, strength and power, and to understand who we are as a nation. The regions where tourists are most likely to engage with First Nations arts and craft are in regional Australia..."

The Australia Council's National Arts Participation Survey found that nearly half of all Australians are actively interested in First Nations arts (47%) and seven million attended in 2016 – a record level of attendance and double that of 2009.

In 2018, Australians went on over 320,000 daytrips that included First Nations arts and craft. Daytrips including First Nations arts and craft have grown 26% since 2016, the fastest growing arts activity over the last two years. In 2018, over half a million overnight trips in Australia included First Nations arts and craft, an increase of 40% since 2014.²⁷

²⁷ Domestic Arts Tourism – Connecting the Country 2020 – Australian Council for the Arts



APPENDIX E: ECONOMIC IMPACTS OF PUBLIC AND PRIVATE SECTOR ACCOMMODATION INVESTMENT

APPENDIX E1 PUBLIC SECTOR INVESTMENT

Introduction

This report provides an economic impact assessment of the proposed Gippsland Aquatic Trail. The results are indicative of the potential benefits from the development and operation of the trails network. The modelling is based on: estimates of annual users/rides (in different categories); and other assumptions utilised in quantifying spending in the areas adjacent to the trail segments.

The trail network goes through 2 local government areas (LGAs)- East Gippsland and Wellington.

For operations, several types of users are identified: locals from the 2 LGAs, domestic day and overnight visitor and international tourists.

The regional economic impacts of the trails arise from: spending by these users/visitors in the towns adjacent to the trail and other spending in the broader region; and the health benefits of active recreation activities for residents of the area.

Visitors from outside the region (particularly domestic overnight visitors/users) generate significant expenditure covering food and beverage; accommodation (for overnight stayers); recreation and other services; and transport.

The economic impact analysis has been undertaken by MCa <Michael Connell & Assocs.> - economic consultants.

Trail Users

Local Users of the Aquatic Trail

The following are estimates of local users of the Gippsland Aquatic Trail. They are based on the analysis outlined in Appendix A. Note trail users from other adjacent LGAs are included in the domestic day and overnight visitor estimates.

Annual uses of the trail by locals increase from around 22,400 in year 1 to 24,300 in year 10.

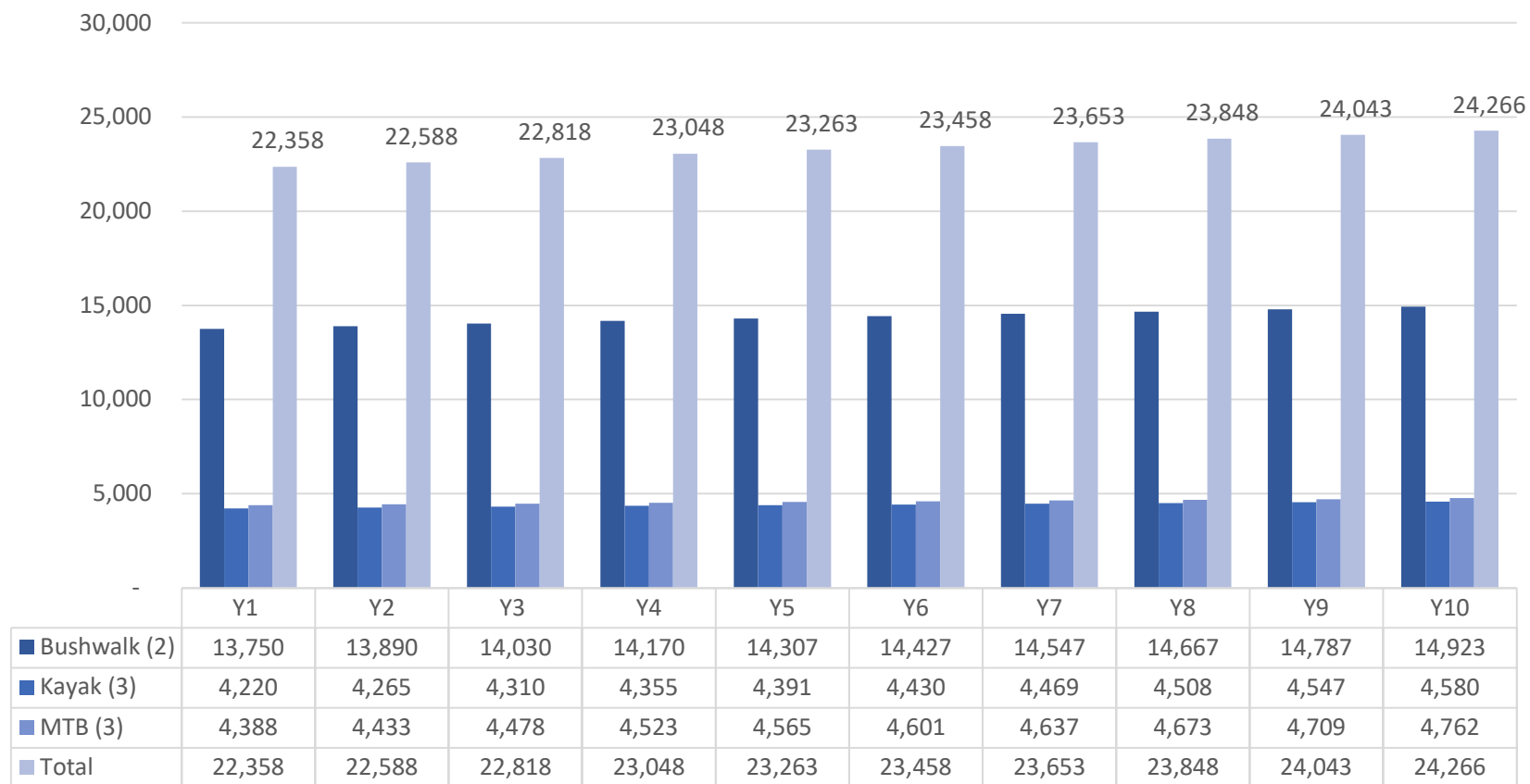
Table 31. Gippsland Aquatic Trail – Estimated Local Users - East Gippsland & Wellington LGA ('000)²⁸

	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10
Participants (estimates)										
Bushwalk	6,875	6,945	7,015	7,085	7,153	7,213	7,273	7,333	7,393	7,462
Kayak	1,407	1,422	1,437	1,452	1,464	1,477	1,490	1,503	1,516	1,527
MTB	1,463	1,478	1,493	1,508	1,522	1,534	1,546	1,558	1,570	1,587
Total	9,745	9,845	9,945	10,045	10,139	10,224	10,309	10,394	10,479	10,576
Uses of Trail										
Bushwalk (2)	13,750	13,890	14,030	14,170	14,307	14,427	14,547	14,667	14,787	14,923

²⁸ MCa estimates & analysis , June 2021 . Brackets() = uses per year.

	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10
Kayak (3)	4,220	4,265	4,310	4,355	4,391	4,430	4,469	4,508	4,547	4,580
MTB (3)	4,388	4,433	4,478	4,523	4,565	4,601	4,637	4,673	4,709	4,762
Total	22,358	22,588	22,818	23,048	23,263	23,458	23,653	23,848	24,043	24,266

Figure 56. Local Uses of Gippsland Aquatic Trail - Estimates (no.)²⁹



²⁹ MCA estimates & analysis, June 2021. Brackets() = uses per year

Visitors - Users of Aquatic Trail

Modelling Assumptions

For visitors, 3 cases were developed – Medium Case (most likely); High Case; and Low Case.

- Estimates were adjusted from earlier estimates. In particular. International visitors/trail users were reduced to reflect likely longer-term impacts of covid-19 on international tourist numbers.
- At the same time, the experience during the pandemic has been for significant increases in domestic visitors to regional areas (both intrastate and interstate) overnight visitors

The following tables and charts show the projected number of tourist visitors who may use the trail. The visitor numbers are for the two LGAs where the lakes are located (East Gippsland LGA and Wellington LGA). They show the scope of the market for the Aquatic Trail.

The growth rates are assumed for each of the cases, however the medium growth scenario largely reflects recent growth rates to 2019 for nature-based visitors.³⁰ This is the most likely result for trail visitors.

Table 32. Assumed Growth Rates for Tourist Visitors³¹

Assumed		Years		
Growth Rates %		1-4	5 to 7	8 to 10
Medium Case	Base Year 2019	6%	3.5%	2%
High Case		8%	5%	4%
Low Case	Base Year 2019	3%	2%	1%

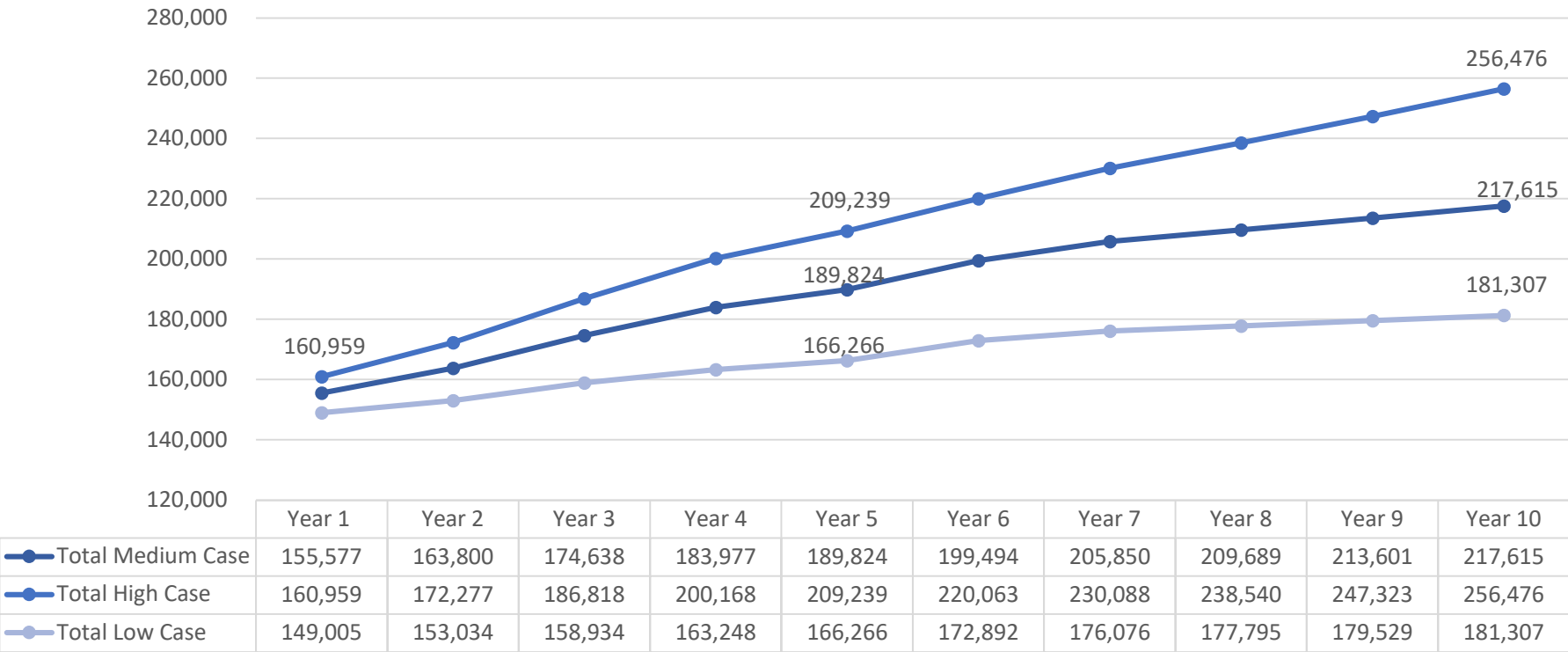
Comparison of Cases

³⁰ Note 2020 is not included due to the impacts of COVID-19 and the restrictions on travel from early 2020.

³¹ MCA Assumptions, June 2021

The following chart and table compares total trail users for each of the 3 cases and shows the growth profile. The Medium Case is the most likely visitor numbers for the trail.

Figure 57. Total Trail Users (Locals & Visitors) Comparison³²



³² MCa estimates & analysis, June 2021

Table 33. Potential Visitor Market for the Gippsland Aquatic Trail - Estimates ('000)³³

	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10
Medium Case										
International	7,000	7,420	10,000	10,600	10,971	15,000	15,525	15,836	16,152	16,475
Domestic overnight	73,406	77,810	82,479	87,427	90,487	93,654	96,932	98,871	100,848	102,865
Domestic day	52,813	55,982	59,341	62,901	65,103	67,381	69,740	71,134	72,557	74,008
Total Visitors	133,219	141,212	151,819	160,929	166,561	176,036	182,197	185,841	189,558	193,349
Total Locals	22,358	22,588	22,818	23,048	23,263	23,458	23,653	23,848	24,043	24,266
Total All	155,577	163,800	174,638	183,977	189,824	199,494	205,850	209,689	213,601	217,615
High Case										
International	10,000	10,800	14,000	15,120	15,876	18,000	18,900	19,656	20,442	21,260
Domestic overnight	74,791	80,774	87,236	94,215	98,926	103,872	109,065	113,428	117,965	122,684
Domestic day	53,810	58,114	62,763	67,785	71,174	74,732	78,469	81,608	84,872	88,267
Total Visitors	138,600	149,688	163,999	177,119	185,975	196,604	206,434	214,692	223,279	232,211
Total Locals	22,358	22,588	22,818	23,048	23,263	23,458	23,653	23,848	24,043	24,266
Total All	160,959	172,277	186,818	200,168	209,239	220,063	230,088	238,540	247,323	256,476
Low Case										
International	4,000	4,120	6,000	6,180	6,304	10,000	10,200	10,302	10,405	10,509
Domestic overnight	71,328	73,468	75,672	77,942	79,501	81,091	82,713	83,540	84,375	85,219
Domestic day	51,318	52,858	54,444	56,077	57,198	58,342	59,509	60,104	60,705	61,312
Total Visitors	126,647	130,446	136,116	140,199	143,003	149,434	152,422	153,946	155,486	157,041
Total Locals	22,358	22,588	22,818	23,048	23,263	23,458	23,653	23,848	24,043	24,266
Total All	149,005	153,034	158,934	163,248	166,266	172,892	176,076	177,795	179,529	181,307

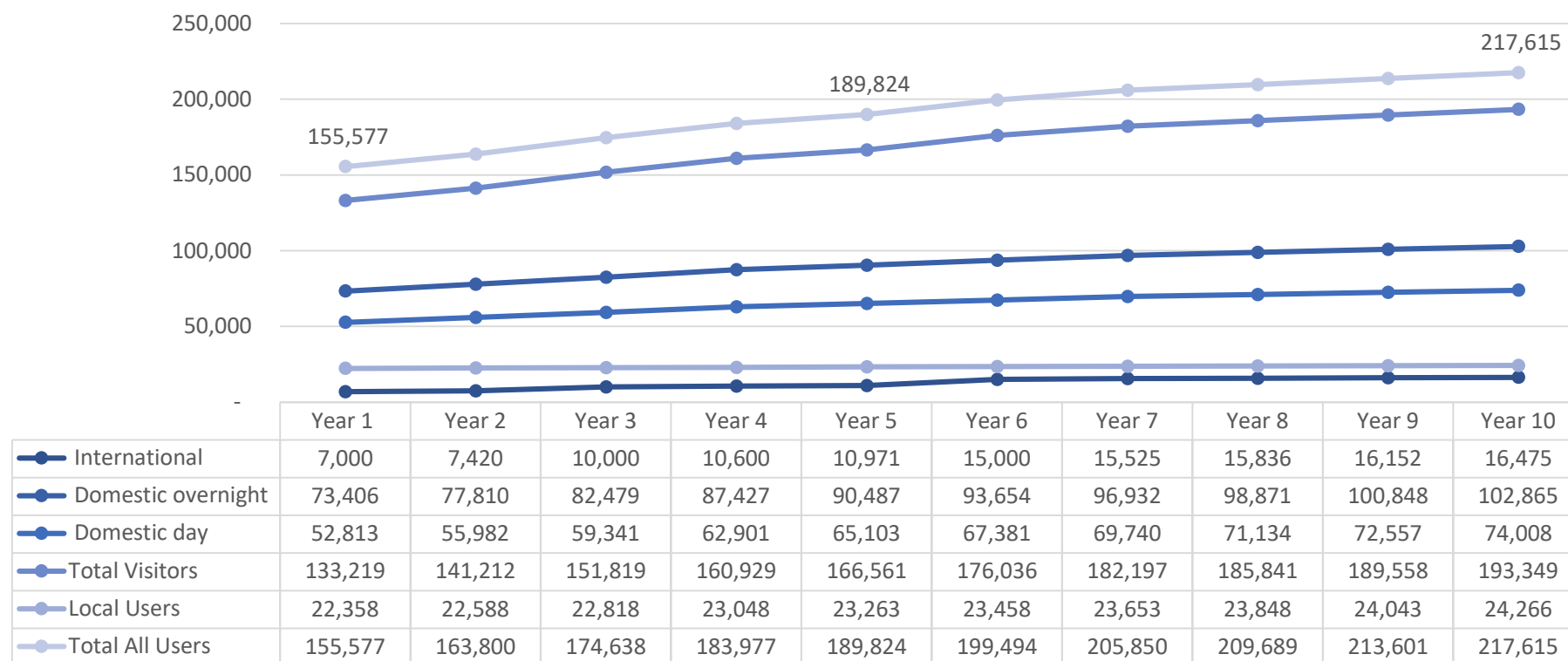
³³ MCA estimates & analysis, June 2021

Trail Users - Medium Case

The following chart shows estimated trail users for the Medium Case. It includes visitors (international, domestic day, domestic overnight) and local users (residents of the 2 LGAs).³⁴ Users from adjacent LGAs are included in the domestic day/overnight user numbers.

Total users increase from around 155,600 in year 1 to 217,600 in year 10.

Figure 58. Medium Case – All Trail Users³⁵



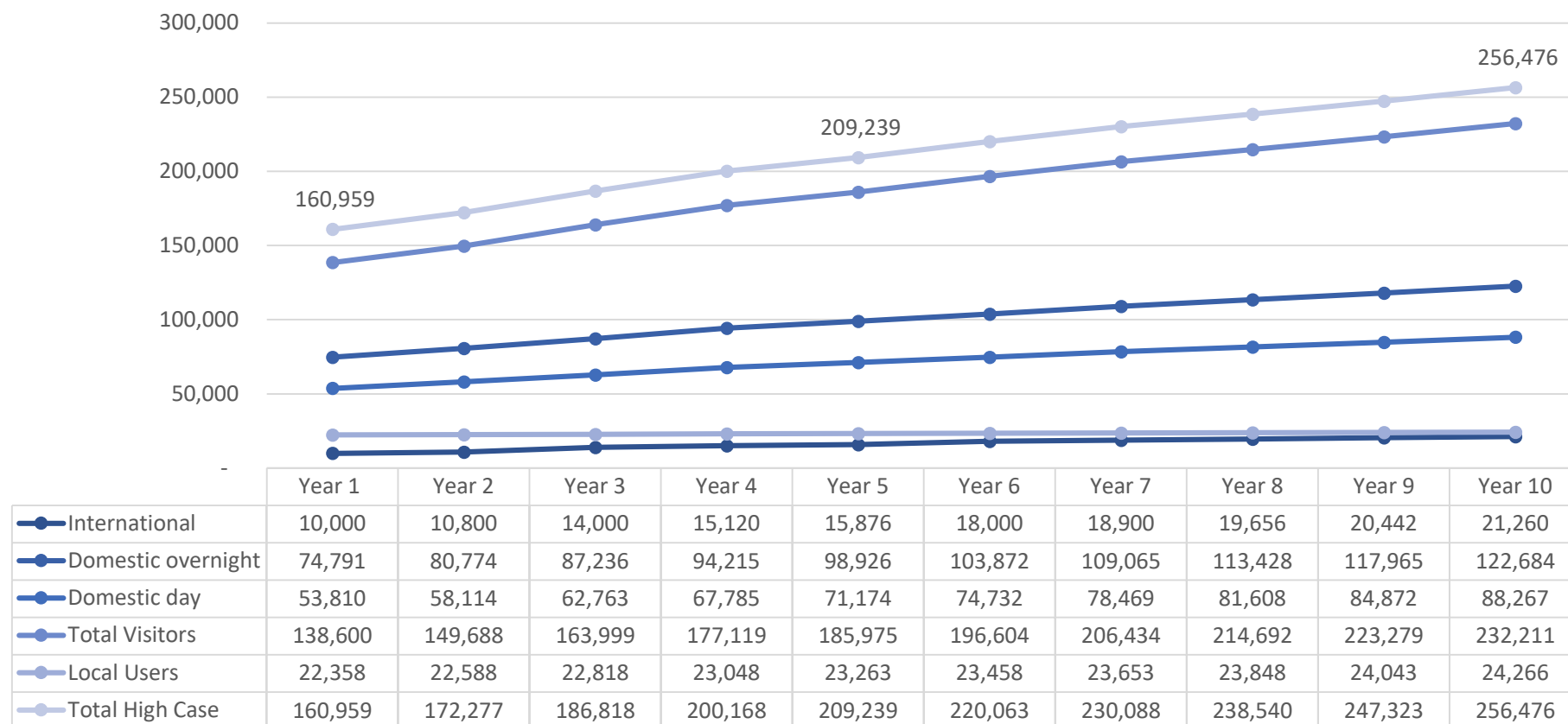
³⁴ The same estimated local users are included in each of the 3 cases

³⁵ MCA estimates & analysis, June 2021

Trail Users - High Case

The following chart shows estimated trail users for the High Case. Total users increase from around 161,000 in year 1 to 256,500 in year 10.

Figure 59. High Case – All Trail Users ³⁶

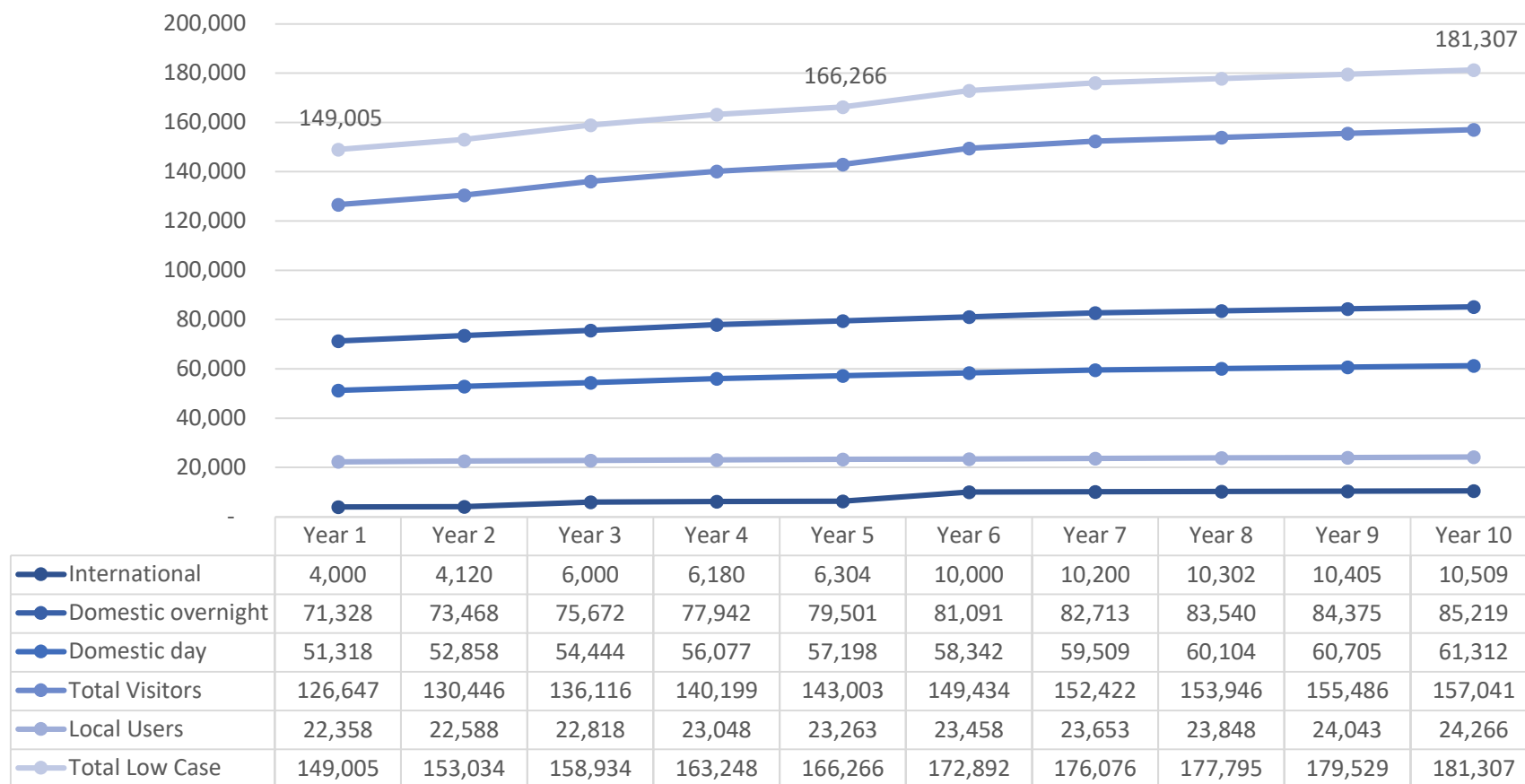


³⁶ MCA estimates & analysis, June 2021

Trail Users -Low Case

The following chart shows estimated trail users for the Low Case. Total users increase from around 149,300 in year 1 to 181,000 in year 10.

Figure 60. Low Case - All Trail Users³⁷



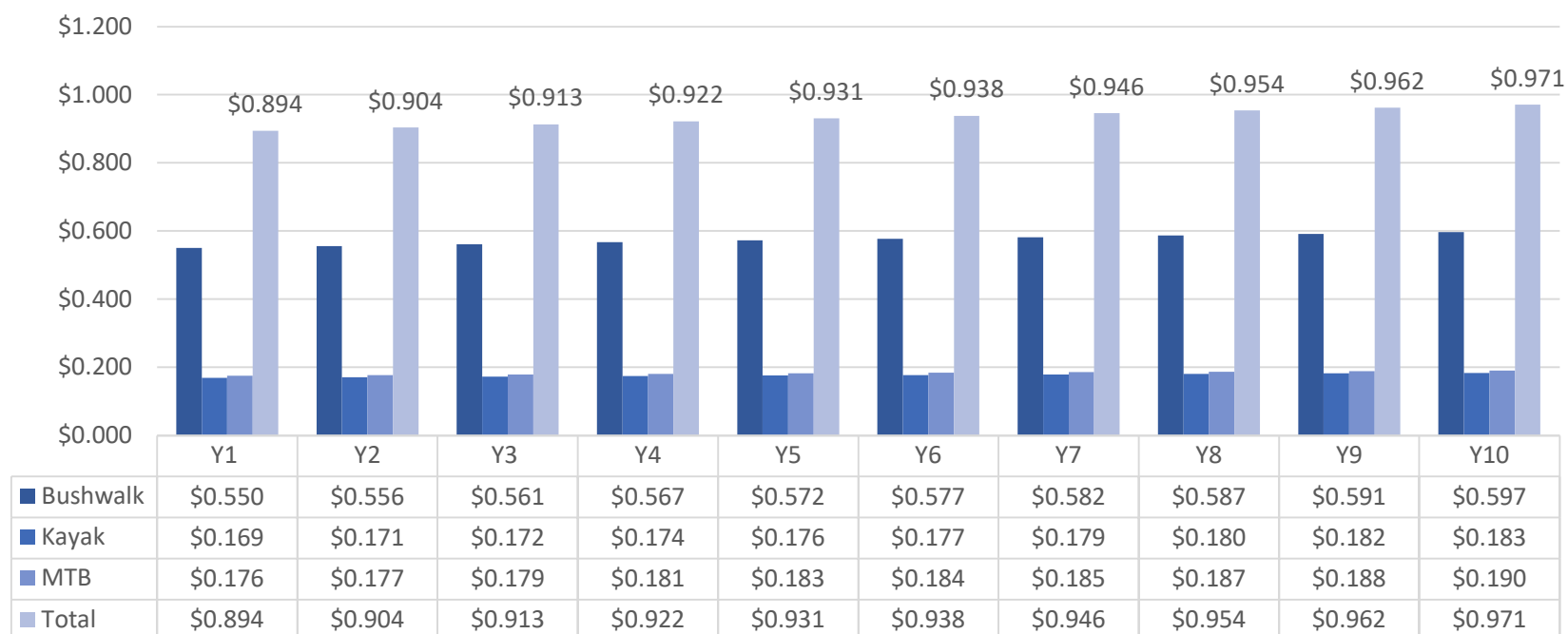
³⁷ MCA estimates & analysis , June 2021

Spending in the Region

Spending - Local Trail Users

Annual spending by local users was estimated for the 10-year period. Spending is in areas adjacent to the trail and is mainly spending on food and drinks and is based on an average spend of \$40 per local trail users. Total spending increases from \$0.894 million in year 1 to \$0.971 million in year 10.³⁸ Separate estimates are made for spending on bike and kayak hire (see Appendix E).

Table 34. Local Trail Users Spending in Region (\$ million 2021 prices)³⁹



³⁸ In constant 2021 prices.

³⁹ MCa estimates & analysis, June 2021. Brackets() = uses per year.

Spending - All Trail Users

The following chart and table compare spending in the region by trail users for the three cases. Spending covers accommodation (for overnight stays), food and beverages, other retail, tourism and recreation spending and other induced spending.

- For the Medium Case total spending increases from \$38.5 million in year 1 to \$55.7 million in year 10.
- For the High Case total spending increases from \$40.1 million in year 1 to \$66.8 million in year 10.
- For the Low Case total spending increases from \$36.5 million in year 1 to \$45.3 million in year 10.

Three spending estimates for the Medium Case (most likely) are utilised in the economic impact assessment.

Figure 61. Total Spending - All Users Comparison (\$million 2021 prices)⁴⁰



⁴⁰ MCA estimates & analysis, June 2021.

Table 35. Total Spending in Region by Trail Users (\$million 2021 prices)⁴¹

Trail User Spending	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Medium Case										
International	\$2.205	\$2.337	\$3.150	\$3.339	\$3.456	\$4.725	\$4.890	\$4.988	\$5.088	\$5.190
Domestic overnight	\$30.390	\$32.213	\$34.146	\$36.195	\$37.462	\$38.773	\$40.130	\$40.933	\$41.751	\$42.586
Domestic day	\$4.964	\$5.262	\$5.578	\$5.913	\$6.120	\$6.334	\$6.556	\$6.687	\$6.820	\$6.957
Total Visitors	\$37.559	\$39.813	\$42.874	\$45.447	\$47.037	\$49.832	\$51.576	\$52.607	\$53.660	\$54.733
Locals	\$0.894	\$0.904	\$0.913	\$0.922	\$0.931	\$0.938	\$0.946	\$0.954	\$0.962	\$0.971
Medium - Total All Users	\$38.454	\$40.716	\$43.787	\$46.369	\$47.968	\$50.770	\$52.522	\$53.561	\$54.621	\$55.703
High Case										
International	\$3.150	\$3.402	\$4.410	\$4.763	\$5.001	\$5.670	\$5.954	\$6.192	\$6.439	\$6.697
Domestic overnight	\$30.963	\$33.440	\$36.116	\$39.005	\$40.955	\$43.003	\$45.153	\$46.959	\$48.838	\$50.791
Domestic day	\$5.058	\$5.463	\$5.900	\$6.372	\$6.690	\$7.025	\$7.376	\$7.671	\$7.978	\$8.297
Total Visitors	\$39.171	\$42.305	\$46.425	\$50.139	\$52.646	\$55.698	\$58.483	\$60.822	\$63.255	\$65.785
Locals	\$0.894	\$0.904	\$0.913	\$0.922	\$0.931	\$0.938	\$0.946	\$0.954	\$0.962	\$0.971
High - Total All Users	\$40.066	\$43.209	\$47.338	\$51.061	\$53.577	\$56.636	\$59.429	\$61.776	\$64.217	\$66.756
Low Case										
International	\$1.260	\$1.298	\$1.890	\$1.947	\$1.986	\$3.150	\$3.213	\$3.245	\$3.278	\$3.310
Domestic overnight	\$29.530	\$30.416	\$31.328	\$32.268	\$32.913	\$33.572	\$34.243	\$34.586	\$34.931	\$35.281
Domestic day	\$4.824	\$4.969	\$5.118	\$5.271	\$5.377	\$5.484	\$5.594	\$5.650	\$5.706	\$5.763
Total Visitors	\$35.614	\$36.682	\$38.336	\$39.486	\$40.276	\$42.206	\$43.050	\$43.481	\$43.915	\$44.354
Locals	\$0.894	\$0.904	\$0.913	\$0.922	\$0.931	\$0.938	\$0.946	\$0.954	\$0.962	\$0.971
Low - Total All Users	\$36.508	\$37.586	\$39.249	\$40.408	\$41.206	\$43.144	\$43.996	\$44.434	\$44.877	\$45.325

⁴¹ MCA estimates & analysis, June 2021.

Spending - Equipment Hire

There is the potential for the development of equipment hire businesses located on the trails. Estimates of hire spending were made based on assumptions in relation to the percentage of trail users hiring bikes or kayaks. The assumptions and estimates are included in Appendix E.

For the Medium Case, the number of hirers increase from around 58,100 in year 1 to 84,300 in year 10. This represents an estimated equipment hire market of \$2.030 million in year 1 increasing to \$2.945 million in year 10.

Figure 62. Equipment Hire Revenue (\$ million 2021 prices)⁴²



⁴² MCA estimates & analysis, June 2021.

Economic Impact Analysis

The economic impacts of the development of the Gippsland Trail are modelled for both the construction phase and the operations phase. The impacts are measured in terms of full-time equivalent jobs (FTE); and the increase in regional income that is generated by trail users and their spending in the region.⁴³

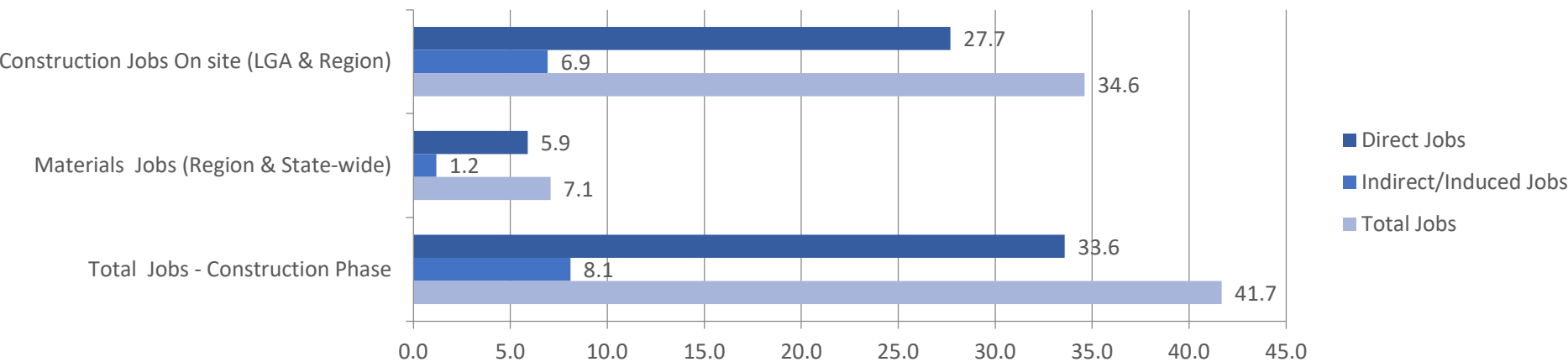
Construction Phase

A significant number of jobs and an increase in regional income will be generated during the construction phase of the project. Construction costs for the trail and associated infrastructure were estimated at \$12 million.⁴⁴

Economic Impacts

A total of 41.7 FTE jobs (33.6 direct jobs and 8.1 indirect/induced jobs) would be generated in the region during the construction period. The direct jobs comprise 27.7 FTE jobs in on-site construction and 5.9 jobs in materials/equipment supply.

Figure 63. Aquatic Trail - Construction Phase Jobs (FTE)⁴⁵



43 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.

44 TRC estimate, June 2021

45 MCA modelling & analysis, June 2021.

Table 36. Aquatic Trail - Construction Phase Jobs (FTE)⁴⁶

	Direct Jobs (FTE)	Indirect/Induced Jobs (FTE)	Total Jobs (FTE)
Construction Jobs On site (LGA & Region)	27.7	6.9	34.6
Materials Jobs (Region & State-wide)	5.9	1.2	7.1
Total Jobs - Construction Phase	33.6	8.1	41.7

The following table shows the increase in regional income generated during the construction of the trail.⁴⁷ During construction a total of \$8.600 million in income would be generated in the region (\$7.167 million direct income and \$1.433 million indirect/induced).

Table 37. Aquatic Trail – Regional Income Generated (FTE)⁴⁸

Regional Income	Direct Income	Indirect /Induced Income	Total Regional Income
Construction	\$6,600,000	\$1,320,000	\$7,920,000
Materials & Equipment (Region)	\$567,000	\$113,400	\$680,400
Total Regional Income	\$7,167,000	\$1,433,400	\$8,600,400

⁴⁶ MCA modelling & analysis, June 2021.

⁴⁷ This assumes the construction workforce would come from the Gippsland Region and adjacent areas.

⁴⁸ MCA modelling & analysis, June 2021.

Operations Phase

The operations phase economic impacts of the trail are driven by the expenditure of visitors/users in towns adjacent to the trail and in the broader region. MCA's regional economic model is used to estimate the employment and income impacts of the 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.⁴⁹ The economic impact assessment is for the more likely Medium Case.

Employment Impacts

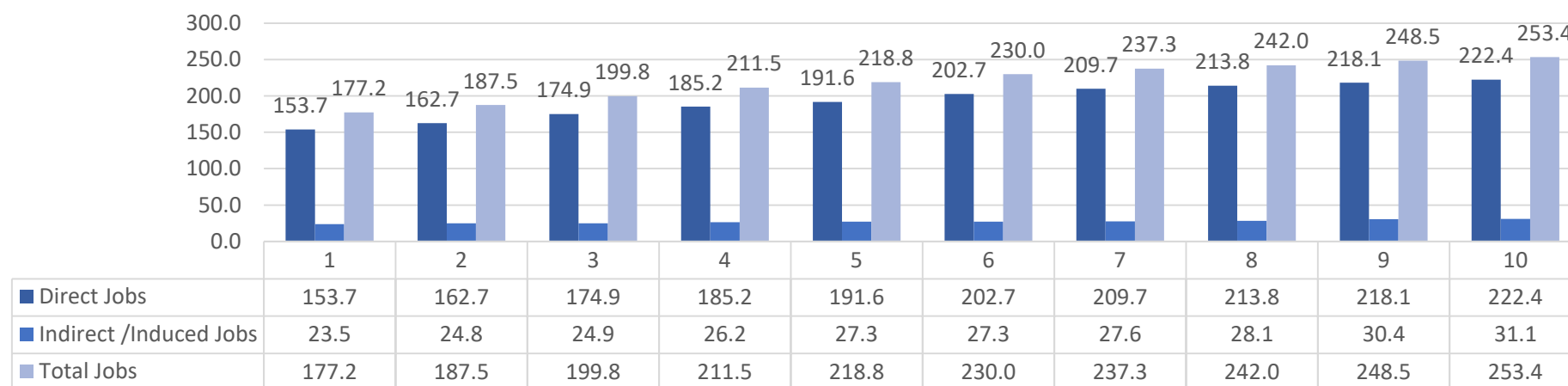
Medium Case Trail Users

The charts and tables below show the increase in jobs in the region generated by each of the user/visitor groups. These are for the Medium Case.

The operation of the trails would generate a total of 153.7 direct full-time equivalent jobs in year 1, increasing to 222.4 direct FTE jobs in Year 10. Total jobs (direct and indirect/induced) are 177.2 FTE in year 1 increasing to 253.4 in year 10.

- The major contributors to jobs are domestic overnight visitors and domestic day visitors.
- On a sector basis, the jobs (FTE- direct and indirect) generated by trail users are mainly concentrated in accommodation; food and beverage; recreational services and other visitor products and services; transport (including shuttles); and other retail.

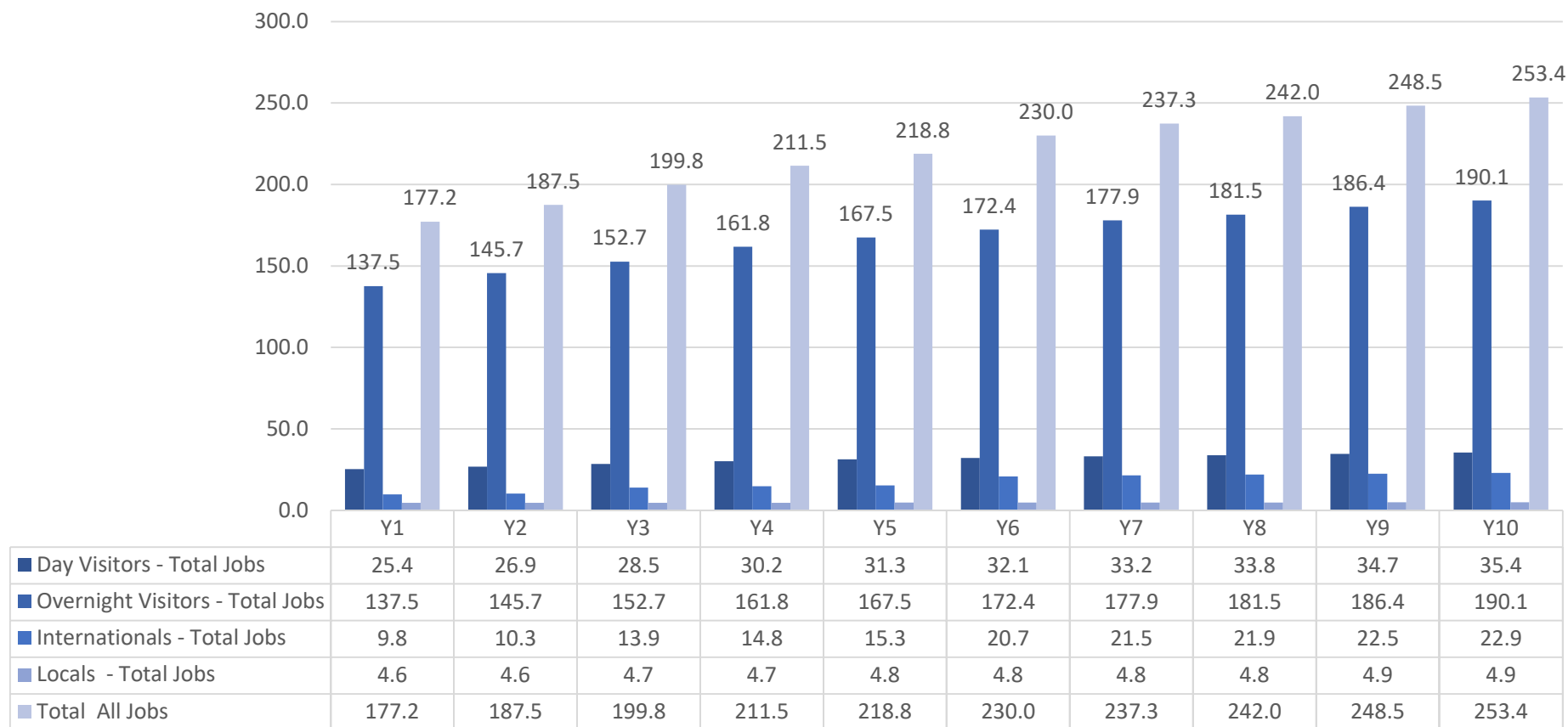
Figure 64. Medium Case - Jobs Generated by Trail Users (FTE no.)⁵⁰



⁴⁹ 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.

⁵⁰ MCA modelling & analysis, June 2021.

Figure 65. Medium Case - Total Jobs Generated by Trail Users (FTE no.)⁵¹



⁵¹ MCA modelling & analysis, June 2021.

The industry analysis highlights that total full time equivalent (FTE) jobs generated by trail users will be in recreation services/other services (hire, equipment, servicing, other services etc.) – 46.0 FTE jobs in year 10 ; transport (including shuttles) 24.9 jobs in year 10 ; accommodation 79.7 jobs in year 10; and food and beverage 73.6 jobs in year 10.

Table 38. Total Jobs Generated by Trail Users by Industry Years 1 -10 (FTE no.)⁵²

Medium Case Total Jobs Generated (FTE no.)	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10
Accommodation	54.4	57.6	62.2	66.0	68.3	72.6	75.1	76.6	78.1	79.7
Food & Beverage	51.4	54.4	58.1	61.5	63.6	66.9	69.1	70.4	72.2	73.6
Other Retail	14.7	15.5	16.4	17.4	18.0	18.8	19.3	19.7	20.4	20.8
Health	1.9	2.0	2.0	2.1	2.2	2.2	2.3	2.3	2.5	2.5
Transportation	17.6	18.6	19.7	20.8	21.6	22.5	23.2	23.7	24.4	24.9
Communication	0.7	0.7	0.7	0.8	0.8	0.8	0.8	0.8	0.9	0.9
Recreation Services/Other Services	32.7	34.5	36.6	38.7	40.0	41.8	43.1	43.9	45.1	46.0
Education	1.1	1.2	1.2	1.2	1.3	1.3	1.3	1.3	1.4	1.5
Miscellaneous	2.7	2.8	2.9	3.0	3.1	3.1	3.2	3.2	3.5	3.6
Total	177.2	187.5	199.8	211.5	218.8	230.0	237.3	242.0	248.5	253.4

⁵² MCA modelling & analysis, June 2021.

Regional Income Impacts

For the Medium Case, the increase in regional income generated annually by the operation of the trails and visitor/user spending totals \$13.665 million in year 1, increasing to \$19.587 million in year 10.⁵³

Figure 66. Medium Regional Income Generated (\$m 2021 prices)⁵⁴



⁵³ 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.

⁵⁴ MCA modelling & analysis, June 2021.

Regional Income -10 Years

The chart and table show total regional income over the 10-year period for the Medium Case. Total regional income generated over the period is \$170.7 million (in 2021 prices).

Figure 67. Medium Case - Regional Income 10 Years (\$ million 2021 prices)⁵⁵

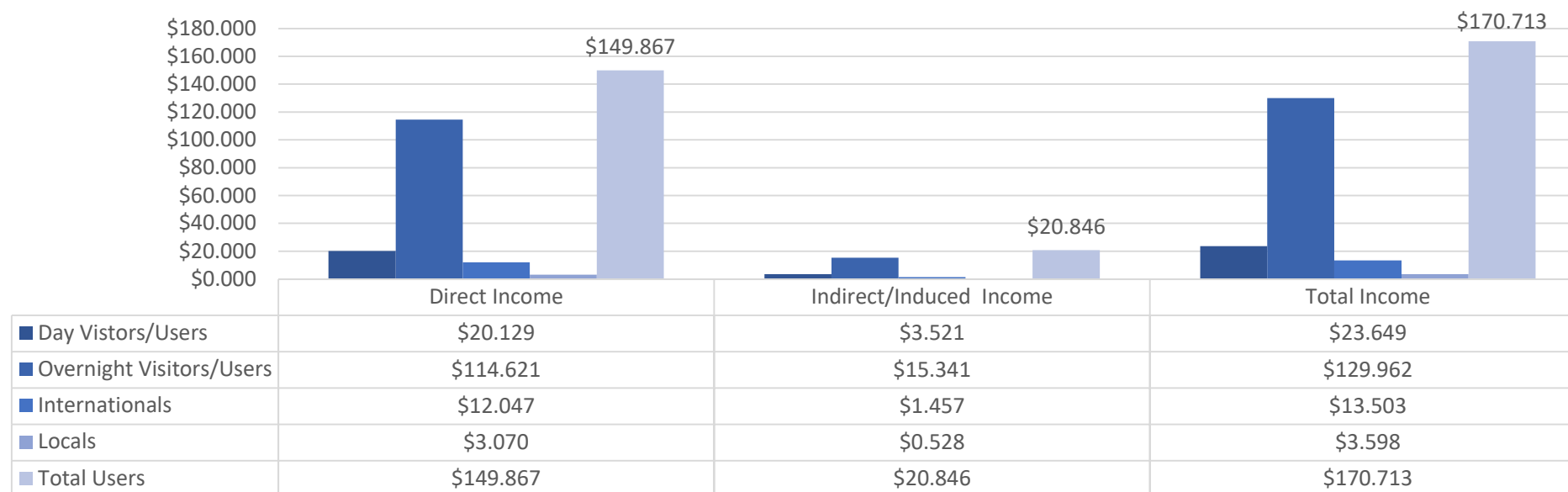


Table 39. Medium Case - Regional Income 10 Years (\$ million 2021 prices)⁵⁶

Total 10 Years - Medium Case	Day Visitors/Users	Overnight Visitors/Users	Internationals	Locals	Total Users
Direct Income	\$20.129	\$114.621	\$12.047	\$3.070	\$149.867
Indirect/Induced Income	\$3.521	\$15.341	\$1.457	\$0.528	\$20.846
Total Income	\$23.649	\$129.962	\$13.503	\$3.598	\$170.713

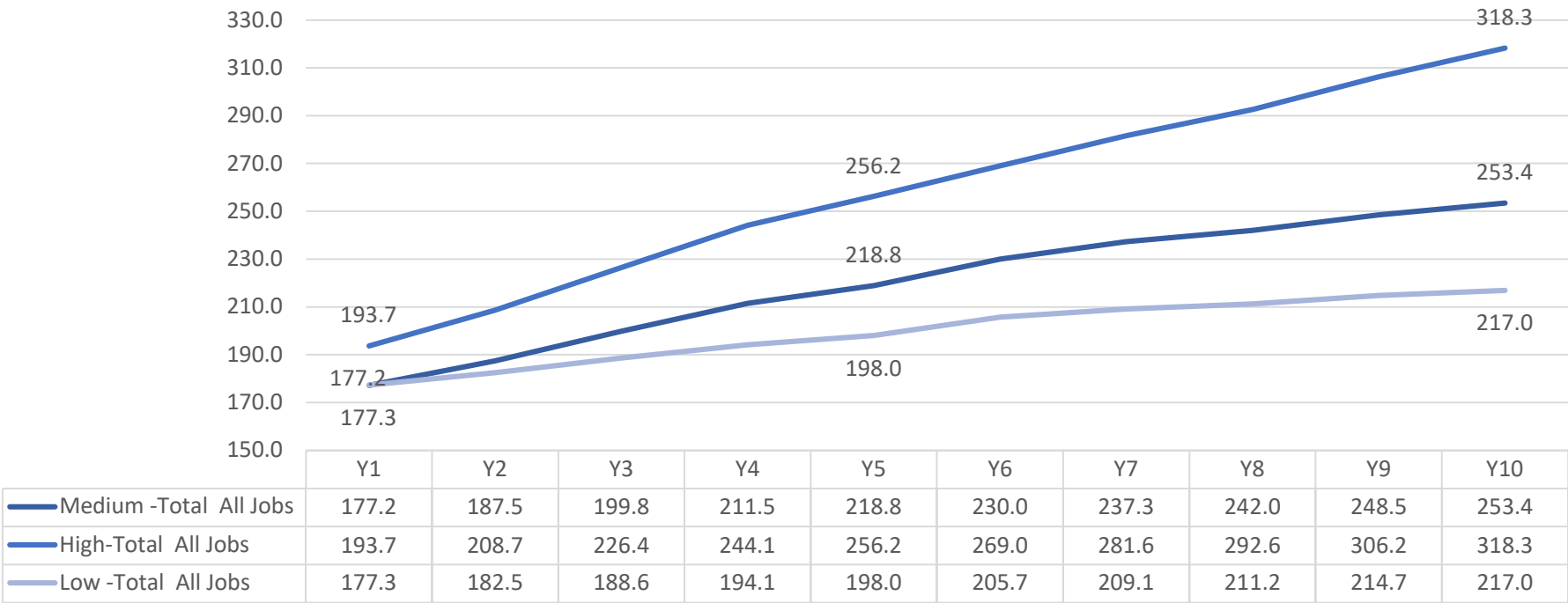
⁵⁵ MCA modelling & analysis, June 2021.

⁵⁶ MCA modelling & analysis, June 2021.

Comparison of Cases

The chart below compares the total jobs generated in the region for each of the 3 cases. In year 10 the results are Medium Case 253 jobs. High Case 318 jobs and Low Case 217 jobs.

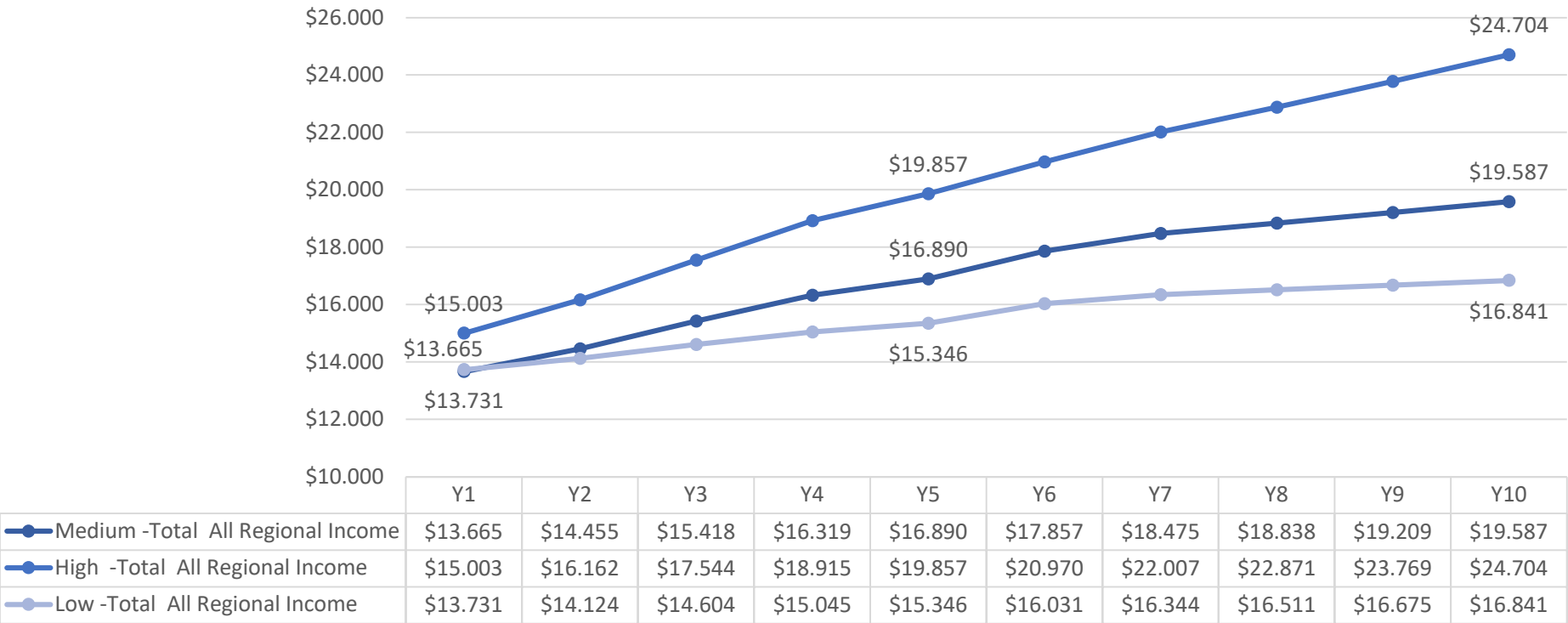
Figure 68. Comparison of Cases - Total Jobs Generated (FTE no.)⁵⁷



⁵⁷ MCa modelling & analysis, June 2021.

The chart below compares the total income in the region generated for each of the 3 cases. In year 10 the results are Medium Case \$19.6 million, High Case \$24.7 million and Low Case \$16.8 million.

Figure 69. Total Regional Income (\$ mill 2021 prices)⁵⁸



⁵⁸ MCa modelling & analysis, June 2021.

Trail Benefits and Costs

The benefits and costs of are analysed for a 10-year period for the Medium Case.

Trail Costs - 10 Years

The estimated construction cost of the trail project is \$12.0 million, and the 10-year maintenance costs are \$3.0 million (assumed to be \$300,000 per year over 10 years) for a total 10-year project cost of \$15.0 million.

Table 40. Trail Capital Costs (2021 Prices)⁵⁹

Trail Costs	Costs \$2021
Capital Costs - Trails & Infrastructure 2020 (\$)	\$12,000,000
Costs - Maintenance (2.5% per year =10 years)	\$3,000,000
Total Costs	\$15,000,000

Measuring Benefits – 10 Years

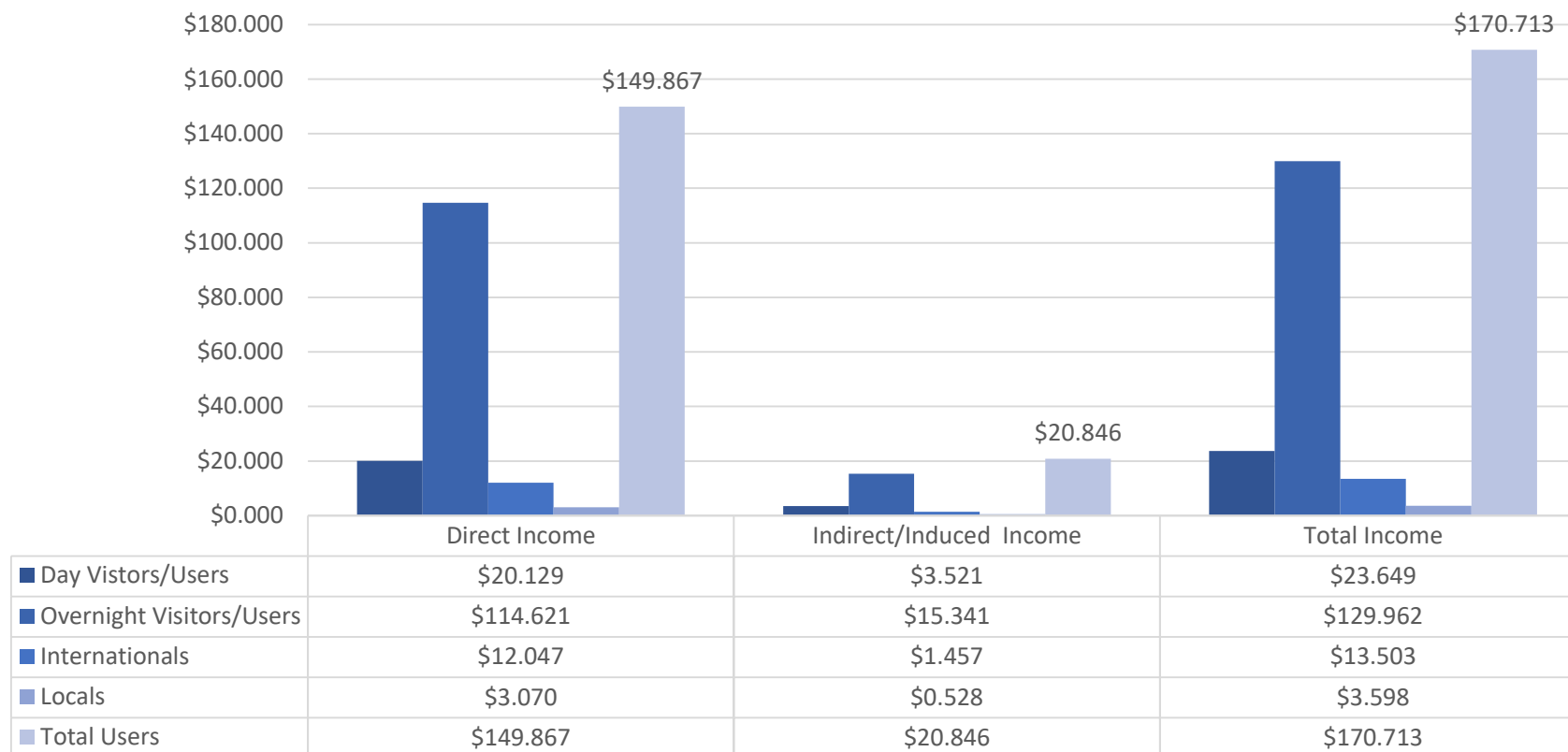
The measured benefits of the trail comprise the increase in regional income generated and the health benefits of exercise.

Increase in Regional income

The increase in regional income generated by trail users spending over a 10-year period totals \$170.7 million (in constant \$2021 prices).

⁵⁹ MCA modelling & analysis, June 2021.

Figure 70. Medium Case Regional Income 10 Years (\$ million 2021 prices)⁶⁰



⁶⁰ MCA modelling & analysis, June 2021.

Table 41. Medium Case Regional Income 10 Years (\$ million 2021 prices)⁶¹

Total 10 Years (Medium Case)	Day Visitors/Users	Overnight Visitors/Users	International Visitors/Users	Local/Regional Users	Total Users
Direct Income	\$20,128,548	\$114,621,203	\$12,046,722	\$3,070,361	\$149,866,834
Indirect/Induced Income	\$3,520,653	\$15,340,971	\$1,456,519	\$527,540	\$20,845,682
Total Income	\$23,649,201	\$129,962,173	\$13,503,241	\$3,597,901	\$170,712,516

Health Benefits

A report by Marsden Jacobs Associates indicates that exercise of cycling/active walking in Victorian Parks has net healthcare benefits (in terms of avoided health costs) of \$15 per hour in terms of a reduction in lifetime health costs (adjusted for injury).⁶²

Healthcare benefits are measured as the net (adjusted for injury) avoided costs to the national healthcare system (private costs and government costs) attributable to engaging in nature-based outdoor activity.

- For the analysis of the trails, we have assumed an average cycle period of 3 hours per day and the health benefits of \$10 per hour. The measured health benefits are only for local users from the 2 LGAs (East Gippsland and Wellington).
- These indirect health benefits are estimated at \$7.0 million over the 10-year period.

Table 42. Estimated Health Benefits – Local Users (\$ million Constant Prices \$2021)⁶³

Health Benefits (Local Users)											
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10	Total 10 Years
Health Benefits (estimate)	\$0.671	\$0.678	\$0.685	\$0.691	\$0.698	\$0.704	\$0.710	\$0.715	\$0.721	\$0.728	\$7.000

⁶¹ MCA modelling & analysis, June 2021.

⁶² Victoria's Nature-Based Outdoor Economy- Key Estimates and Recommendations, Marsden Jacobs Associates, January 2016 P10 & 21.

⁶³ MCA modelling & analysis, June 2021.

Regional Benefit Cost Analysis

Gippsland Aquatic Trail

The following table and chart show the benefits and costs of the operations of the trails over a 10-year period. The benefits are measured by the increase in regional income generated by trail users over a 10-year period; and the estimated health benefits to the region.⁶⁴ The costs include construction costs, and asset maintenance costs. For the comparison, the present value of the benefits is calculated using 3 discount rates (4%, 7% and 10%).

Table 43. Benefits and Cost Analysis –Gippsland Trails Sections - 10 Year Period (Constant prices \$2021)⁶⁵

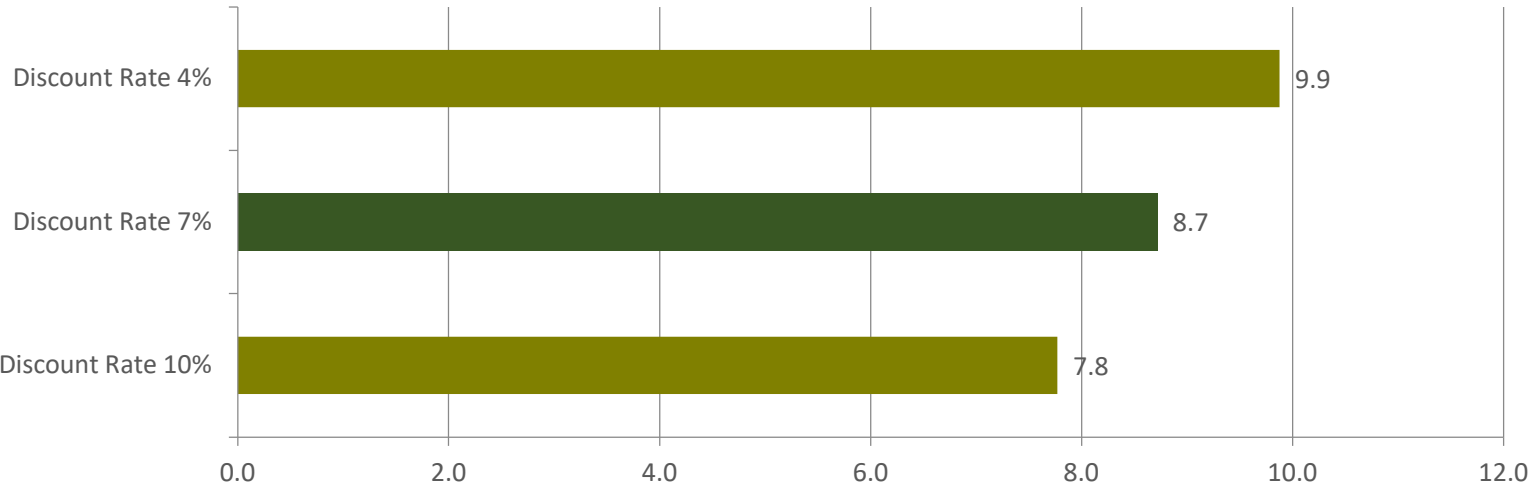
Total Project: Medium Case Regional Cost Benefit (\$2021 prices)	Discount Rate 3%	Discount Rate 7%	Discount Rate 10%
Period: 10 Years			
Trail Costs			
Capital Costs Trails & Infrastructure 2020 (\$)	\$12,000,000	\$12,000,000	\$12,000,000
Costs - Maintenance (2.5% per year =10 years)	\$3,000,000	\$3,000,000	\$3,000,000
Total Costs	\$15,000,000	\$15,000,000	\$15,000,000
Direct Benefits (users) (10 years)			
Regional Income Increase	\$170,712,516	\$170,712,516	\$170,712,516
Health Benefits (Regional Users)	\$7,000,368	\$7,000,368	\$7,000,368
Total Benefits	\$177,712,885	\$177,712,885	\$177,712,885
Total Benefits (\$) Present Value	\$148,128,000	\$130,766,880	\$116,562,740
Net Present Value (\$) Total Benefits	\$133,128,000	\$115,766,880	\$101,562,740
NPV/Capital Costs	11.1	9.6	8.5
Benefit Cost Ratio (BCR)	9.9	8.7	7.8
NPV/Cost	8.9	7.7	6.8

⁶⁴ The measure health benefits are to those local users who are resident in the two LGAs (Wellington and East Gippsland).

⁶⁵ MCA modelling & estimates, June 2021. Note: Direct benefits are the value to users of a facility; usually this is measure by user payments/fees. In this case there are no user charges for the trail. Therefore, benefits are the increase in regional income generated by visitor spending, and the health benefits of exercise activity.

The chart below compares Benefit Cost Ratios (BCR) for the 3 discount rates. For a trail project a 7% discount rate is appropriate, and the project yields a positive BCR of 8.7. The present value of total benefits (\$130.766 million) generated by the investment are 8.7 times the total costs of the project (\$15.00 million) over a 10-year period.

Figure 71. Benefit Cost Ratio (BCR) - Gippsland Aquatic Trail - All Benefits⁶⁶



⁶⁶ MCA modelling & analysis, June 2021.

Estimating Trails Use by Locals

For estimating trail use by locals, the Victoria in Future 2019 (VIF2019) population projections to 2036 were used. Projections for 2021 to 2031 were used to for a 10-year analysis.

To estimate local trail users, the national participation rates for sports/activities were applied to the population projections for Wellington and East Gippsland LGAs (the two LGAs where the trail would be located).

Table 44. Participation Rates Sports 2019 Financial Year⁶⁷

Participation rate (%) Activities	Total	15-17	18-24	25-34	35-44	45-54	55-64	65+	Males Total	Females Total
Bush walking	7.4%	2.4%	6.4%	9.0%	8.8%	9.1%	8.5%	4.2%	6.7%	8.1%
Cycling	12.5%	5.0%	6.7%	10.8%	15.0%	19.1%	16.8%	8.6%	15.6%	9.4%
Mountain biking	1.6%	1.1%	0.9%	1.3%	3.2%	2.5%	1.4%	0.3%	2.6%	0.6%
Canoeing/Kayaking	1.5%	0.6%	0.6%	0.9%	1.4%	2.5%	2.5%	1.4%	1.7%	1.3%
Total	10.5%	4.1%	8.0%	11.1%	13.4%	14.1%	12.4%	6.0%	10.9%	10.0%

Table 45. Population and Participants in Activities (East Gippsland LGA & Wellington LGA)⁶⁸

Population & Participation		2016	2021	2026	2031	2036
Population						
East Gippsland (S)		45,599	48,317	50,752	53,418	55,955
Wellington (S)		43,531	44,843	46,179	47,690	49,057
Total		89,130	93,160	96,930	101,107	105,013
Participation	Partic Rate %					
East Gippsland (S)						
Bushwalk	7.4%	3,365	3,566	3,745	3,942	4,130
Kayak	1.6%	689	730	766	807	845
MTB	1.5%	716	759	797	839	879
Total		4,770	5,054	5,309	5,587	5,853
Wellington (S)						
Bushwalk	7.4%	3,213	3,309	3,408	3,520	3,620
Kayak	1.6%	657	677	697	720	741

⁶⁷ AusPlay survey results July 2019 - June 2020

⁶⁸ MCA estimates & analysis, November 2020

Population & Participation		2016	2021	2026	2031	2036
MTB	1.5%	683	704	725	749	770
Total		4,553	4,691	4,830	4,988	5,131
Total 2 LGAs						
Bushwalk		6,578	6,875	7,153	7,462	7,750
Kayak		1,346	1,407	1,464	1,527	1,586
MTB		1,399	1,463	1,522	1,587	1,649
Total		9,323	9,745	10,139	10,576	10,984

Table 46. Gippsland Aquatic Trail – Estimated Local Users - East Gippsland & Wellington LGA ('000)⁶⁹

	2022				2026					2031
	1	2	3	4	5	6	7	8	9	10
Participants (estimates)										
Bushwalk	6,875	6,945	7,015	7,085	7,153	7,213	7,273	7,333	7,393	7,462
Kayak	1,407	1,422	1,437	1,452	1,464	1,477	1,490	1,503	1,516	1,527
MTB	1,463	1,478	1,493	1,508	1,522	1,534	1,546	1,558	1,570	1,587
Total	9,745	9,845	9,945	10,045	10,139	10,224	10,309	10,394	10,479	10,576
Uses of Trail										
Bushwalk (2)	13,750	13,890	14,030	14,170	14,307	14,427	14,547	14,667	14,787	14,923
Kayak (3)	4,220	4,265	4,310	4,355	4,391	4,430	4,469	4,508	4,547	4,580
MTB (3)	4,388	4,433	4,478	4,523	4,565	4,601	4,637	4,673	4,709	4,762
Total	22,358	22,588	22,818	23,048	23,263	23,458	23,653	23,848	24,043	24,266

⁶⁹ MCA analysis, November 2020

Estimating Tourist Visitors & Trail Users

Visitors Greater Gippsland

Table 47. Greater Gippsland Region Visitors (YE March 2020)⁷⁰

YE March 2020			
Total Visitors			
Greater Gipps	Visitors	Tourism Nights	Ave nights/days
Domestic Overnights	2,637,000	7,730,000	2.93
Domestic Day	4,575,000		1
International Overnights	76,000	713,000	9.38

Nature Based Tourists – Greater Gippsland Region

Table 48. Nature Based Tourists – Greater Gippsland Region⁷¹

Nature Based Tourists Calendar 2019 Greater Gippsland Region	Visitors	Tourism Nights	Ave nights/days
Domestic Overnights	440,000	1,320,000	3
Domestic Day	452,000	452,000	1
International Overnights	38,000	418,000	11

⁷⁰ <https://www.visitgippsland.com.au/resources/travel-to-the-greater-gippsland-region-and-its-sub-regions-year-ending-march-20>

⁷¹ Tourism Research Australia Data, 4-year average to Dec 2019

Figure 72. Nature Based Visitors Greater Gippsland Region ('000)⁷²

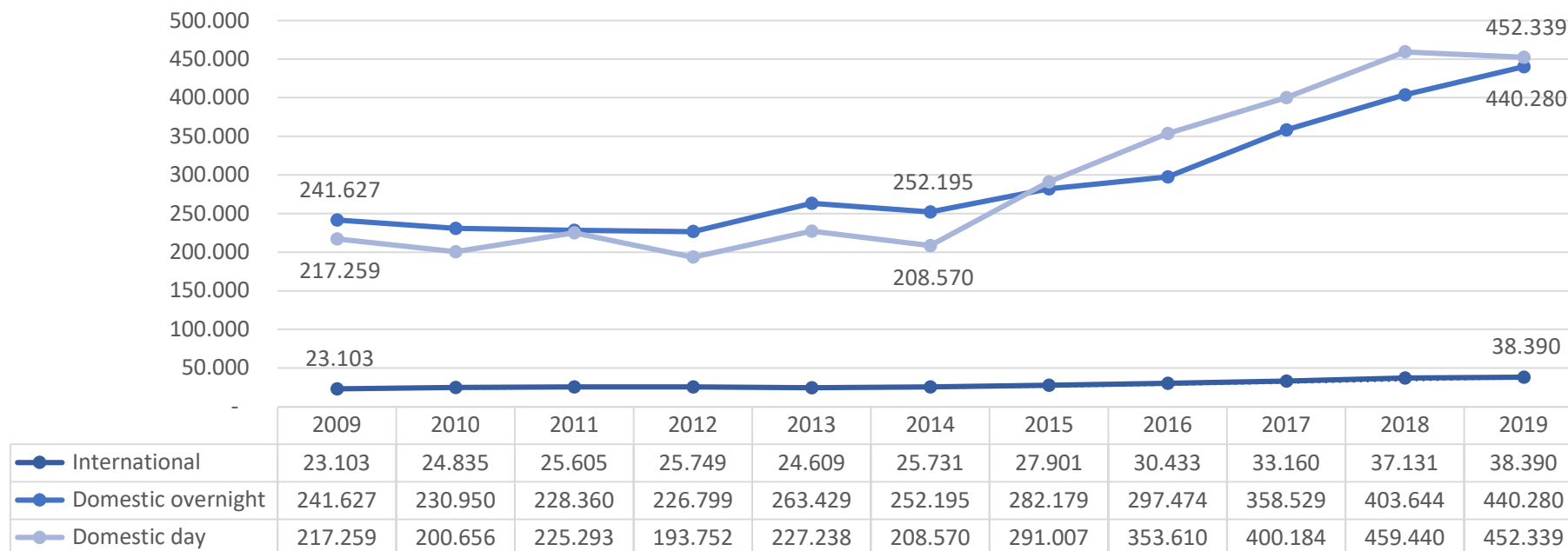


Table 49. Nature Based Visitors Greater Gippsland Region ('000)⁷³

Greater Gippsland Region Nature Based Visitors	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
International	23.103	24.835	25.605	25.749	24.609	25.731	27.901	30.433	33.160	37.131	38.390
Domestic overnight	241.627	230.950	228.360	226.799	263.429	252.195	282.179	297.474	358.529	403.644	440.280
Domestic day	217.259	200.656	225.293	193.752	227.238	208.570	291.007	353.610	400.184	459.440	452.339
Total	481.989	456.441	479.258	446.299	515.275	486.496	601.086	681.517	791.873	900.215	931.009

⁷² Tourism Research Australia Data, 4-year average to Dec 2019

⁷³ Tourism Research Australia Data, 4-year average to Dec 2019

Visitor Estimates for Areas Where Trail Located

Nature Based Tourist Visitors

The Gippsland Lakes Aquatic Trail is in two LGAs – East Gippsland and Wellington. Estimates were made of the of nature-based visitors by applying the share of nature-based visitors for Greater Gippsland to the visitor numbers for each of the two LGAs.

Table 50. East Gippsland LGA Nature Based Tourist Visitors 2009-2020⁷⁴

East Gippsland LGA Nature Based Visitors (’000)	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
International	13.263	14.732	13.852	13.762	12.566	12.655	13.051	13.757	17.603	18.806	20.447	13.770
Domestic overnight	83.388	80.106	85.195	72.955	103.382	82.209	98.193	105.069	118.313	133.755	151.601	144.517
Domestic day	34.461	38.310	40.114	31.841	34.800	30.064	43.580	34.450	50.442	69.666	59.707	78.365
Total	131.112	133.148	139.161	118.559	150.749	124.927	154.824	153.276	186.358	222.227	231.754	236.652

Table 51. Wellington LGA - Nature Based Tourist Visitors 2009-2020⁷⁵

Wellington LGA Nature Based Visitors (’000)	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
International	2.995	3.788	4.197	3.552	3.665	4.640	4.950	4.586	3.684	5.304	3.756	4.173
Domestic overnight	37.197	35.649	35.042	36.803	38.881	46.408	46.080	44.333	61.550	61.524	55.788	78.457
Domestic day	38.726	39.840	35.074	21.508	32.148	29.027	40.989	57.690	66.796	60.810	81.492	58.295
Total	78.918	79.277	74.314	61.862	74.695	80.075	92.019	106.608	132.030	127.638	141.035	140.925

Table 52. Total East Gippsland LGA & Wellington LGA - Nature Based Tourist Visitors 2009-2020 (’000)⁷⁶

Total East Gippsland & Wellington LGA Nature Based Visitors (’000)	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
International	16.258	18.521	18.049	17.314	16.231	17.295	18.001	18.343	21.288	24.111	24.202	17.943
Domestic overnight	120.585	115.755	120.238	109.758	142.263	128.617	144.273	149.402	179.863	195.279	207.389	222.974
Domestic day	73.187	78.150	75.189	53.349	66.949	59.092	84.569	92.139	117.238	130.476	141.198	136.660
Total	210.030	212.426	213.475	180.421	225.444	205.003	246.843	259.884	318.388	349.865	372.789	377.577

Trail Related Activities

⁷⁴ MCA Estimates based on <https://www.visitgippsland.com.au/resources/travel-to-the-greater-gippsland-region-and-its-sub-regions-year-ending-march-20> November 2020

⁷⁵ MCA Estimates based on <https://www.visitgippsland.com.au/resources/travel-to-the-greater-gippsland-region-and-its-sub-regions-year-ending-march-20> November 2020

⁷⁶ MCA Estimates based on <https://www.visitgippsland.com.au/resources/travel-to-the-greater-gippsland-region-and-its-sub-regions-year-ending-march-20> November 2020

Estimates were made of nature-based tourist visitors , who are pursuing activities that relate to the trail. It was assumed that the domestic day visitor share is the same as that domestic overnight visitors. These shares were applied to the time series estimates for East Gippsland and Wellington LGAs to estimate visitors by activity.

Table 53. Greater Gippsland Region Shares of Nature Based Visitors (estimates)⁷⁷

Greater Gippsland Region	Shares of nature-based visitors			
	Visit national parks / state parks	Bushwalking / rainforest walks	Water activities / sports	Cycling
International overnight	0.48	0.55	0.14	0.09
Domestic overnight	0.21	0.24	0.06	0.04
Domestic day	0.22	0.24	0.06	0.04

Table 54. East Gippsland & Wellington LGAs – Estimates by Activity (Annual 2009-2020) ('000)⁷⁸

TOTAL EAST GIPPS & WELLINGTON	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Visit national parks / state parks												
International	7.77	8.85	8.63	8.28	7.76	8.27	8.61	8.77	10.18	11.53	11.57	8.58
Domestic overnight	24.85	23.86	24.78	22.62	29.32	26.51	29.73	30.79	37.07	40.25	42.74	45.96
Domestic day	15.94	17.02	16.38	11.62	14.58	12.87	18.42	20.07	25.53	28.42	30.75	29.76
Total	48.56	49.73	49.79	42.52	51.66	47.65	56.76	59.63	72.78	80.19	85.07	84.30
Bushwalking / rainforest walks												
International	8.87	10.10	9.84	9.44	8.85	9.43	9.82	10.00	11.61	13.15	13.20	9.79
Domestic overnight	28.35	27.22	28.27	25.81	33.45	30.24	33.92	35.13	42.29	45.92	48.77	52.43
Domestic day	18.19	19.42	18.68	13.26	16.64	14.68	21.01	22.90	29.13	32.42	35.09	33.96
Total	55.41	56.74	56.80	48.51	58.94	54.36	64.76	68.03	83.04	91.49	97.05	96.18
Water activities / sports												
International	2.25	2.56	2.49	2.39	2.24	2.39	2.49	2.53	2.94	3.33	3.34	2.48
Domestic overnight	7.18	6.89	7.16	6.54	8.47	7.66	8.59	8.90	10.71	11.63	12.35	13.28
Domestic day	4.60	4.92	4.73	3.36	4.21	3.72	5.32	5.80	7.38	8.21	8.88	8.60
Total	14.03	14.37	14.38	12.28	14.92	13.76	16.40	17.23	21.03	23.17	24.57	24.35

⁷⁷ Tourism Research Australia Data, 4-year average to Dec 2019

⁷⁸ MCA Estimates based on <https://www.visitgippsland.com.au/resources/travel-to-the-greater-gippsland-region-and-its-sub-regions-year-ending-march-20>

TOTAL EAST GIPPS & WELLINGTON	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Cycling												
International	1.48	1.69	1.64	1.58	1.48	1.57	1.64	1.67	1.94	2.19	2.20	1.63
Domestic overnight	4.73	4.54	4.72	4.31	5.58	5.05	5.66	5.86	7.06	7.66	8.14	8.75
Domestic day	3.03	3.24	3.12	2.21	2.78	2.45	3.51	3.82	4.86	5.41	5.85	5.67
Total	9.24	9.47	9.48	8.09	9.83	9.07	10.80	11.35	13.85	15.26	16.19	16.05
Total All Activities												
Total East Gipps & Wellington	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
International	20.36	23.20	22.61	21.69	20.33	21.66	22.55	22.98	26.66	30.20	30.31	22.47
Domestic overnight	65.12	62.51	64.93	59.27	76.83	69.46	77.91	80.68	97.13	105.45	111.99	120.41
Domestic day	41.76	44.60	42.91	30.44	38.20	33.72	48.26	52.58	66.90	74.46	80.58	77.99
Total	127.25	130.31	130.45	111.40	135.36	124.84	148.72	156.24	190.70	210.11	222.88	220.87
Total Bushwalk, kayak, cycle only												
Total East Gipps & Wellington	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
International	12.59	14.34	13.98	13.41	12.57	13.39	13.94	14.21	16.49	18.67	18.74	13.90
Domestic overnight	40.27	38.65	40.15	36.65	47.50	42.95	48.18	49.89	60.06	65.21	69.25	74.45
Domestic day	25.82	27.58	26.53	18.82	23.62	20.85	29.84	32.51	41.37	46.04	49.82	48.22
Total	78.68	80.57	80.66	68.88	83.70	77.19	91.96	96.61	117.92	129.92	137.82	136.57

Equipment Hire

There is the potential for the development of equipment hire businesses located on the trails. Estimates of hire spending were made based on assumptions in relation to the percentage of trail users hiring bikes or kayaks.

Local Trail Users – Equipment Hire

For local users it was assumed that 50% would hire kayaks and 30% mountain bikes. Average charges were assumed to be Kayak \$30; and bike \$40. Based on these rates the revenue from local hires was estimated at around \$116,000 in Year 1 increasing to \$126,000 in year 10.

Table 55. Equipment Hire Locals – Estimates (no.)⁷⁹

Locals Hirers	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10
Kayak	2,110	2,133	2,155	2,178	2,195	2,215	2,234	2,254	2,273	2,290
MTB	1,316	1,330	1,343	1,357	1,370	1,380	1,391	1,402	1,413	1,429
Total	3,426	3,462	3,498	3,534	3,565	3,595	3,626	3,656	3,686	3,719
Hire Revenue										
Kayak	\$63,302	\$63,977	\$64,652	\$65,327	\$65,864	\$66,449	\$67,034	\$67,619	\$68,204	\$68,702
MTB	\$52,654	\$53,194	\$53,734	\$54,274	\$54,785	\$55,217	\$55,649	\$56,081	\$56,513	\$57,146
Total	\$115,956	\$117,171	\$118,386	\$119,601	\$120,649	\$121,666	\$122,683	\$123,700	\$124,717	\$125,848

Visitor Trail Users - Equipment Hire

The following are estimates of hiring of equipment by visitors, which are based on the following assumptions.

Table 56. Hiring Assumptions - Visitors

Equipment Assumptions	Percentage Hiring	Ave Hire Charge
International	60%	\$35
Domestic overnight	40%	\$35
Domestic day	40%	\$35

⁷⁹ MCA estimates & analysis, June 2021.

Table 57. Table C.3 Equipment Hire – Visitors & Locals Estimates (no.)⁸⁰

Hire Equipment	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Medium Case										
International	4,200	4,452	6,000	6,360	6,583	9,000	9,315	9,501	9,691	9,885
Domestic overnight	29,362	31,124	32,991	34,971	36,195	37,462	38,773	39,548	40,339	41,146
Domestic day	21,125	22,393	23,736	25,160	26,041	26,953	27,896	28,454	29,023	29,603
Total Visitors	54,688	57,969	62,728	66,491	68,819	73,414	75,984	77,503	79,054	80,635
Local Users	3426	3462	3498	3534	3565	3595	3626	3656	3686	3719
Total Medium Case	58,114	61,431	66,226	70,026	72,384	77,010	79,609	81,159	82,740	84,353
High Case										
International	6,000	6,480	8,400	9,072	9,526	10,800	11,340	11,794	12,265	12,756
Domestic overnight	29,916	32,310	34,894	37,686	39,570	41,549	43,626	45,371	47,186	49,073
Domestic day	21,524	23,246	25,105	27,114	28,469	29,893	31,388	32,643	33,949	35,307
Total Visitors	57,440	62,035	68,400	73,872	77,565	82,242	86,354	89,808	93,400	97,136
Local Users	3426	3462	3498	3534	3565	3595	3626	3656	3686	3719
Total High Case	60,867	65,498	71,898	77,406	81,130	85,837	89,979	93,464	97,087	100,855
Low Case										
International	2,400	2,472	3,600	3,708	3,782	6,000	6,120	6,181	6,243	6,305
Domestic overnight	28,531	29,387	30,269	31,177	31,800	32,436	33,085	33,416	33,750	34,088
Domestic day	20,527	21,143	21,777	22,431	22,879	23,337	23,804	24,042	24,282	24,525
Total Visitors	51,459	53,002	55,646	57,316	58,462	61,773	63,009	63,639	64,275	64,918
Local Users	3426	3462	3498	3534	3565	3595	3626	3656	3686	3719
Total Low Case	54,885	56,465	59,145	60,850	62,027	65,369	66,635	67,295	67,962	68,637

⁸⁰ MCA estimates & analysis, June 2021.

For the medium case, the number of hirers increase from around 58,100 in year 1 to 84,300 in year 10. This represents an equipment hire market of \$2.030 million in year 1 increasing to \$2.945 million in year 10.

Figure 73. Equipment Hire Revenue (\$ million 2021 prices)⁸¹



⁸¹ MCa estimates & analysis, June 2021.

Table 58. Equipment Hire Revenue – Estimates (\$ million 2021 prices)⁸²

Equipment Hire Revenue	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Medium Case										
International	\$0.147	\$0.156	\$0.210	\$0.223	\$0.230	\$0.315	\$0.326	\$0.333	\$0.339	\$0.346
Domestic overnight	\$1.028	\$1.089	\$1.155	\$1.224	\$1.267	\$1.311	\$1.357	\$1.384	\$1.412	\$1.440
Domestic day	\$0.739	\$0.784	\$0.831	\$0.881	\$0.911	\$0.943	\$0.976	\$0.996	\$1.016	\$1.036
Total Visitors	\$1.914	\$2.029	\$2.195	\$2.327	\$2.409	\$2.570	\$2.659	\$2.713	\$2.767	\$2.822
Local Users	\$0.116	\$0.117	\$0.118	\$0.120	\$0.121	\$0.122	\$0.123	\$0.124	\$0.125	\$0.126
Total Medium Case	\$2.030	\$2.146	\$2.314	\$2.447	\$2.529	\$2.691	\$2.782	\$2.836	\$2.892	\$2.948
High Case										
International	\$0.210	\$0.227	\$0.294	\$0.318	\$0.333	\$0.378	\$0.397	\$0.413	\$0.429	\$0.446
Domestic overnight	\$1.047	\$1.131	\$1.221	\$1.319	\$1.385	\$1.454	\$1.527	\$1.588	\$1.652	\$1.718
Domestic day	\$0.753	\$0.814	\$0.879	\$0.949	\$0.996	\$1.046	\$1.099	\$1.143	\$1.188	\$1.236
Total Visitors	\$2.010	\$2.171	\$2.394	\$2.586	\$2.715	\$2.878	\$3.022	\$3.143	\$3.269	\$3.400
Local Users	\$0.116	\$0.117	\$0.118	\$0.120	\$0.121	\$0.122	\$0.123	\$0.124	\$0.125	\$0.126
Total High Case	\$2.126	\$2.288	\$2.512	\$2.705	\$2.835	\$3.000	\$3.145	\$3.267	\$3.394	\$3.526
Low Case										
International	\$0.084	\$0.087	\$0.126	\$0.130	\$0.132	\$0.210	\$0.214	\$0.216	\$0.219	\$0.221
Domestic overnight	\$0.999	\$1.029	\$1.059	\$1.091	\$1.113	\$1.135	\$1.158	\$1.170	\$1.181	\$1.193
Domestic day	\$0.718	\$0.740	\$0.762	\$0.785	\$0.801	\$0.817	\$0.833	\$0.841	\$0.850	\$0.858
Total Visitors	\$1.801	\$1.855	\$1.948	\$2.006	\$2.046	\$2.162	\$2.205	\$2.227	\$2.250	\$2.272
Local Users	\$0.116	\$0.117	\$0.118	\$0.120	\$0.121	\$0.122	\$0.123	\$0.124	\$0.125	\$0.126
Total Low Case	\$1.917	\$1.972	\$2.066	\$2.126	\$2.167	\$2.284	\$2.328	\$2.351	\$2.374	\$2.398

References

Local Government Area Profiles, 2017, East Gippsland LGA, Tourism Research Australia

Local Government Area Profiles, 2020, Wellington LGA, Tourism Research Australia

Victoria's Nature-Based Outdoor Economy- Key Estimates and Recommendations, Marsden Jacobs Associates, January 2016.

⁸² MCA estimates & analysis, June 2021.

APPENDIX E2 PRIVATE SECTOR INVESTMENT

Overview

This section analyses the operational financials for the accommodation for the Aquatic Trail. Eco Pod style accommodation would be developed at 2 sites on the trail. Each of the sites would comprise 10 cabins, with the capacity for twin share (20 persons at each site). The accommodation is provided for a 4 day (3-night experience) premium experience package comprising: accommodation, all meals, transport (bus and boat); and guided activities – kayaking, walking and mountain biking. The package cost would be \$2700 per person. The financial modelling is based on a single adventure business operating the experience, including the site accommodation.

Modelling of Operations

The following tables detail the assumptions used in the financial modelling.

Table 59. Modelling of Operations -Costs and Inputs⁸³

MODELLING ASSUMPTIONS	
Accommodation	
Sites	2 sites
Number of Cabins	Site 1: 10 Eco Pods – capacity 20 persons Site 2: 10 Eco Pods – capacity 20 persons
Construction Costs	\$3 million each site = total \$6 million
Other Capital Costs	
Boat	\$400,000 (to be leased)
Toyota Coaster Minibus - 22-seater	\$144,000 (to be leased)
Toyota Landcruiser 200 (2 @ \$89,000)	\$178,000 (to be leased)
Trailers (2) - 1 bike/1 kayaks	\$30,000
Equipment	
Kayaks & accessories \$1000 each (20)	\$20,000
Mountain bikes & accessories \$1000 each (20)	\$20,000
Commercial kitchen equipment & plates etc	\$15,000
Soft furnishings etc. (\$1000 per pod)	\$20,000
Infrastructure	
Infrastructure: road, utilities connections & other infrastructure	Assumes to be funded by state government. Government to have revenue from rent on the leases of the sites.
Experience Package	
Fully Catered & Guided (4 days/3 nights)	Package = \$2700 per person
Site 1 - stay	2 nights
Site 2 – stay	1 night
Inclusions	Accommodation, all meals, transport - bus & boat, kayaking– guided, walking -guided, mountain biking guided

⁸³ MCA assumptions, May 2021

Table 60. Modelling Assumptions – Seasons and Occupancy⁸⁴

MODELLING ASSUMPTIONS	
Occupancy: Seasons (50 Weeks)	
High	December-April: Weeks 20 – 5 months
Shoulder	November & May: Weeks 8 – 2 months
Low	June-October: Weeks 20 – 5 months
Groups	Medium Case
High	2 groups per week- Ave 15 persons per group (6 pods double/3 pods singles/1 pod guide & cook)
Shoulder	2 groups per week – Ave 12 persons per group
Low	1 group per week- Ave 8 persons per group
Groups	Low Case
High	2 groups per week- Ave 12 persons per group (6 pods double/3 pods singles/1 pod guide & cook)
Shoulder	2 groups per week – Ave 10 persons per group
Low	1 group per week- Ave 6 persons per group
Groups	High Case
High	2 groups per week- Ave 18 persons per group (9 pods double/1 pod guide & cook)
Shoulder	2 groups per week – Ave 14 persons per group
Low	1 group per week- Ave 10 persons per group

⁸⁴ MCA assumptions, May 2021

Table 61. Modelling Assumptions – Staffing and Expenses⁸⁵

MODELLING ASSUMPTIONS			
Staffing & Costs	Positions	Salary	Total
Manager	1	\$95,000	\$95,000
Admin Support	1	\$50,000	\$50,000
Onsite			
Guides/Camp Support	4	\$70,000	\$280,000
Chefs/cooks	2	\$85,000	\$170,000
Total All	8		\$595,000
Oncosts	On Costs: super, long service leave, annual leave, workers comp – total 21% of wages		
Other staff costs (training, uniforms etc.)	\$1500 per employee		
Operating Expenses			
Utility Costs	Electricity, Gas, Water = 5% of revenue/turnover		
Communications	Telephone, internet = 2% of revenue/turnover		
- Vehicles (2) (Land cruiser or equivalent) - Toyota Coaster Minibus - 22-seater	Operations (lease, fuel, servicing, rego, insurance). Toyota Land Cruiser GX diesel \$16,000 per year x 2 = \$32,000 Operations (lease, fuel, servicing, rego, insurance). Toyota Coaster minibus \$45,000 per year		
Boat	Operations (lease, fuel, servicing, rego, insurance) \$40,000 per year		
Waste	Cost 1% of revenue/turnover		
Communications & IT	Cost 1% of revenue/turnover		
Maintenance (buildings & site)	Cost 2.5% of capital cost		
Cabin Consumables	Cost = \$200 per cabin - \$4000		
Marketing & Promotion	\$80,000		
Other Costs	Cost 1 % of revenue/turnover		
Insurances (Public Liability, Buildings)	Cost 3% of revenue		
Health & Safety	Cost 1% of revenue/turnover		
Admin Expenses	Accounting, legal etc = 1% of revenue		
Lease on sites – annual rent	Annual 5% of revenue/turnover		
Soft furnishings (replacement)	Annual \$300 per room = \$6000		
Catering - 4 days/all meals (food share of package =\$500 per person)	Ingredients & supplies (40%) = \$200 per person.		

⁸⁵ MCA assumptions, May 2021

Project Capital Costs and Funding

The following table shows the capital costs for the project (Eco Pods and equipment - \$6.110 million). It is assumed that there is an equity investment of \$1.500 million and the balance \$4.610 million is financed at an interest rate of 5%. Vehicles and the boat are leased at an interest rate of 5.5%.

Table 62. Project Capital Costs⁸⁶

CAPITAL COSTS	
Capital cost (2 sites @ \$3 million each site – total 20 pods)	\$6,000,000
Soft furnishings etc (\$1000 per pod)	\$20,000
Commercial kitchen equipment etc.	\$20,000
Trailers - 1 bike/1 kayaks (2 @ \$15,000 each)	\$30,000
Kayaks & accessories - \$1000 each (20)	\$20,000
Mountain bikes & accessories - \$1000 each (20)	\$20,000
Total	\$6,110,000
Equity	\$1,500,000
Financed	\$4,610,000
Interest Costs (annual) 5%	\$230,500
Leased Equipment	
Boat	\$400,000
Toyota Coaster Minibus - 22-seater	\$144,000
Toyota Landcruiser 200 (2 @ \$89,500)	\$178,000
Total	\$722,000
Lease Costs (@ 5.5%) Annual	
Depreciation Rates	
Eco Pods (@ 5% pa)	

⁸⁶ MCA assumptions, May 2021

Activity Levels and Revenue

The following table shows activity levels and occupancy over the year for 3 cases: medium, low and high. Activity levels are for 3 seasons: High, Shoulder and Low seasons. Revenue is estimated for each case/season based on a package price of \$2700 per person.

Table 63. Activity Levels and Occupancy

SEASONS	PERIOD	MONTHS	WEEKS	NO OF GROUPS AVERAGE	TIMING GROUP 1	TIMING GROUP 2	TOTAL GROUPS	AVE PERSONS	TOTAL PERSONS	REVENUE @\$2,700 P/P
Medium Case										
High	December-April	5	20	2 per week	Friday-Monday	Tuesday-Friday	40	15	600	\$1,620,000
Shoulder	November & May	2	8	2 per week	Friday-Monday	Tuesday-Friday	16	12	192	\$518,400
Low	June-October	5	20	1 per week	Friday-Monday	-	20	8	160	\$432,000
			48				76		952	\$2,570,400
Low Case										
High	December-April	5	20	2 per week	Friday-Monday	Tuesday-Friday	40	12	480	\$1,296,000
Shoulder	November & May	2	8	2 per week	Friday-Monday	Tuesday-Friday	16	10	160	\$432,000
Low	June-October	5	20	1 per week	Friday-Monday	-	20	6	120	\$324,000
			48				76		760	\$2,052,000
High Case										
High	December-April	5	20	2 per week	Friday-Monday	Tuesday-Friday	40	18	720	\$1,944,000
Shoulder	November & May	2	8	2 per week	Friday-Monday	Tuesday-Friday	16	14	224	\$604,800
Low	June-October	5	20	1 per week	Friday-Monday	-	20	10	200	\$540,000
			48				76		1144	\$3,088,800

Source: MCA assumptions, May 2021

Financial Analysis

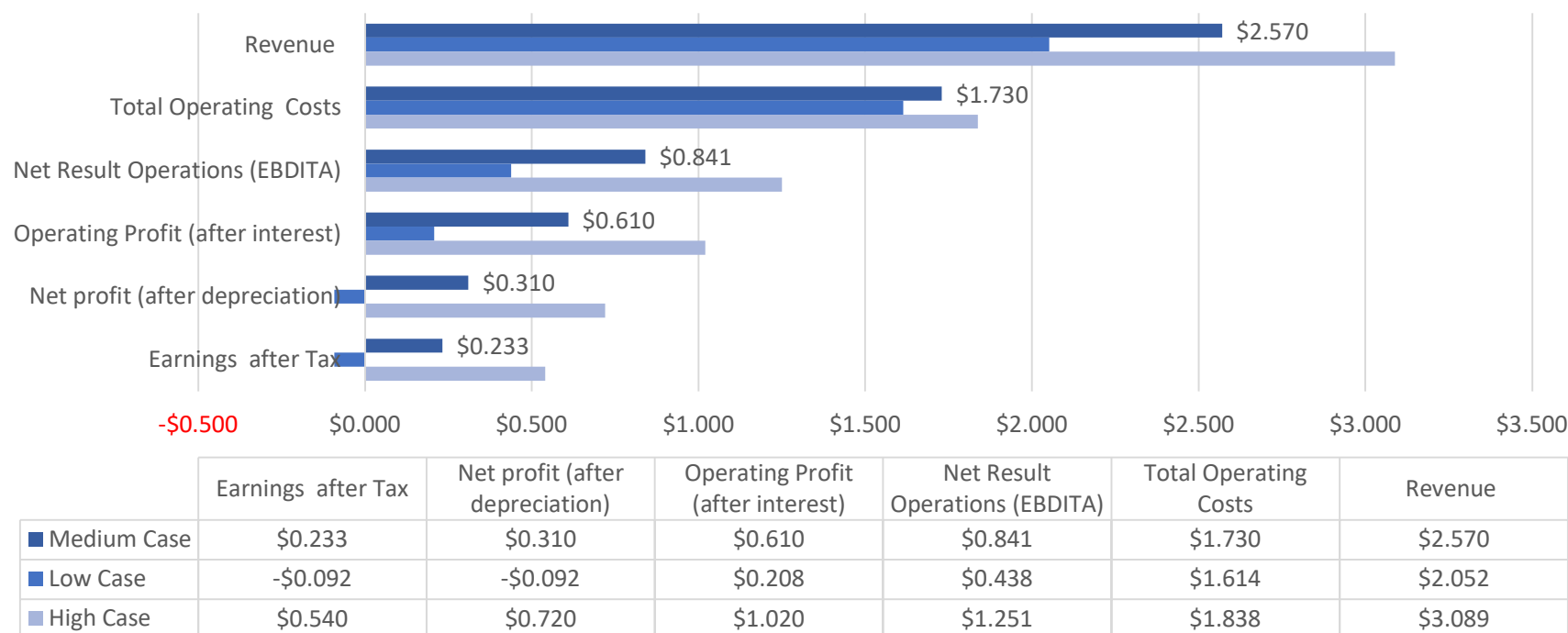
The following table shows the full financial results for each of the 3 cases and are based on the modelling and revenue and cost assumptions.

- Revenue ranges from \$2.052 million (low), \$2.570 million (medium) to \$3.088 million (high)
- The net operating result (EBDITA) is \$840,528 (medium); \$438,388 (low); and \$1.251 million (high).
- Earnings after tax are: \$232,521 (medium); **-\$92,212 (low)**; and \$540,201 million (high).

For the investment to be taken up by an operator, at least the medium case needs to be achieved. It should be noted that the analysis assumes that all the infrastructure development is undertaken by the state government and a long-term lease on the 2 sites is provided to the operator.

The figure and table below shows the summary results for the financials for the proposed trail.

Figure 3. Aquatic Trail Accommodation – Summary Results (\$million)⁸⁷



⁸⁷ MCA financial modelling, May 2021. <EBDITA – earnings before depreciation, interest, tax and amortisation.>. Note: Some differences due to rounding.

Table 64. Annual Operating Results – Aquatic Trail⁸⁸

AQUA TRAIL ACCOMMODATION (ANNUAL OPERATIONS)	MEDIUM CASE	LOW CASE	HIGH CASE
A. REVENUE			
Experience Packages (\$2700 per person)	\$2,570,400	\$2,052,000	\$3,088,800
B. COST OF OPERATIONS			
Employee Costs			
Wages & Salaries	\$595,000	\$595,000	\$595,000
Oncosts (24%)	\$142,800	\$142,800	\$142,800
Training & Uniforms	\$12,000	\$12,000	\$12,000
Total Employee Costs	\$749,800	\$749,800	\$749,800
Costs- Operations			
Utility Costs	\$128,520	\$102,600	\$154,440
Waste	\$25,704	\$20,520	\$30,888
Maintenance (buildings & site)	\$120,000	\$120,000	\$120,000
Insurances (Public Liability, Buildings)	\$77,112	\$77,112	\$77,112
Health & Safety	\$25,704	\$20,520	\$30,888
Cabin Consumables	\$4,000	\$4,000	\$4,000
Soft Furnishing (replace)	\$6,000	\$6,000	\$6,000
Communications & IT	\$25,704	\$20,520	\$30,888
Marketing & Promotion	\$80,000	\$80,000	\$80,000
Admin Expenses	\$25,704	\$20,520	\$30,888
Other Costs	\$25,704	\$20,520	\$30,888
Catering -Food Costs All Meals	\$190,400	\$152,000	\$220,800
Total Operating Costs	\$734,552	\$644,312	\$816,792
Vehicle Costs (including fuel, leases, servicing etc)			
Boat	\$40,000	\$40,000	\$40,000
Bus	\$45,000	\$45,000	\$45,000
Cars - 4WD (2)	\$32,000	\$32,000	\$32,000
Total Vehicle Costs	\$117,000	\$117,000	\$117,000
Site Lease			
Rent - Site (5% of turnover)	\$128,520	\$102,600	\$154,440
Total All Operating Costs	\$1,729,872	\$1,613,712	\$1,838,032

⁸⁸ MCA financial modelling, May 2021. <EBDITA – earnings before depreciation, interest, tax and amortisation.>.

AQUA TRAIL ACCOMMODATION (ANNUAL OPERATIONS)	MEDIUM CASE	LOW CASE	HIGH CASE
Net Result Operations (EBDITA)	\$840,528	\$438,288	\$1,250,768
Finance Costs			
Interest on Loans (Buildings)	\$230,500	\$230,500	\$230,500
C. OPERATING RESULTS			
Operating Profit (after interest)	\$610,028	\$207,788	\$1,020,268
% of revenue	23.7	10.1	33.0
Depreciation Eco Pods	\$300,000	\$300,000	\$300,000
Net profit (after depreciation)	\$310,028	-\$92,212	\$720,268
Company tax (25% 20/21 rate)	\$77,507	0	\$180,067
Earnings after Tax	\$232,521	-\$92,212	\$540,201

Destination **GIPPSLAND**