

A person is kayaking on a body of water during a sunset. The sun is low on the horizon, creating a warm orange glow across the sky and reflecting on the water. The kayaker is in the lower right foreground, wearing a life vest and holding a red and black paddle. The background shows a distant shoreline with trees under a cloudy sky.

Destination **GIPPSLAND**

Gippsland Lakes Aquatic Trail PRE-FEASIBILITY ASSESSMENT

January 2021

This report was prepared by TRC Tourism for Destination Gippsland in relation to the development of Gippsland Lakes Aquatic Trail Pre-Feasibility Assessment.

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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 future.

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1. Introduction

1.1 THE PROJECT

Destination Gippsland is seeking to expand the experiences on offer as drivers for tourism across the region. As a recommendation of both the Gippsland Destination Management Plan and the Gippsland Tracks and Trails Feasibility Study, this feasibility assessment has been commissioned to evaluate the potential and further develop the concept for an iconic Gippsland Lakes Aquatic Trail(s).

The aquatic trail concept is anchored in a set of active travel itineraries that showcase Gippsland Lakes' aquatic environments, associated landscapes, flora, fauna and cultural heritage. The draft routes are designed to leverage multiple modes of active outdoor exploration on foot, by bike and via paddlecraft 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 First Nation Gunaikurnai people.

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.

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 to independent travellers. 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.

1.2 APPROACH TO PROJECT

This feasibility assessment has built on an earlier report *The Gippsland Lakes Trail* by Martin Richardson (2015) that developed a preliminary concept for the trail. The opportunity for development of the Gippsland Lakes Trail was initially identified in the *Gippsland Lakes Ecotourism Tourism Action Plan* (Destination Gippsland (2015)).

This first phase feasibility project has included the following stages:

- Desktop Review
- Consultation and online stakeholder workshops
- Preliminary field visits
- Draft conceptualisation and guide mapping

1.3 THE REGION

As a visitor destination, Gippsland is one of Victoria's most important tourism regions.

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, the latter being in the unusual situation of straddling two state tourism regions of Gippsland and Phillip Island.

The Gippsland region has many national parks, 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 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, hosting 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, is a notable birdlife region, hosts significant flora and has a rich First Nations history, the Gunaikurnai Traditional Owners being custodians for tens of thousands of years.

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 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

The Gunaikurnai people are the Traditional Owners of the Country featured in this feasibility study.

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 traditional owners and the incorporation of such into natural resources (land) management, cultural awareness and knowledge of local history. The Gunaikurnai and their story and culture will be integral to the development of the Gippsland Aquatic Trail experiences.

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 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 – or trails – for Gippsland. This report contributes to this aspiration 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 with potential Gunaikurnai involvement showcasing the magnificent coastline, estuaries, beaches, views, Aboriginal history and local produce of the region. The concept would be for a product that might offer a range of self-guided, partly-supported or exclusive, fully-serviced and catered experiences that may 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 be inclusive of options to be accommodated in the landscape at free, facilitated or potentially commercial eco-camping (glamping) sites. Any such proposals will need to align with the *Lake Tyers State Park Camping and Access Strategy*.

2. The Market

2.1 NATURE BASED CONTEXT

In Australia, the nature based tourism sector contributes an estimated \$23 billion to the economy each year.¹ 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.²

Tourism Australia's Consumer Demand Project (April 2020)³ 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.

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.⁴

¹ BDA Marketing Planning 2015 (Activating Nature-based Tourism in SA – Govt of SA)

² <https://www.hitechgippsland.com/business/tourism/>

³ Tourism Australia Fact Sheet April 2020

⁴ https://www.business.vic.gov.au/__data/assets/pdf_file/0004/1865164/Visitor-Experiences-in-Victoria-year-ending-December-2019.pdf

Figure 1. The Market

Visitors 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%



2.2 GREATER GIPPSLAND VISITOR ECONOMY

The Greater Gippsland sub-regions 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.⁵

Figure 2. Tourism Visitors

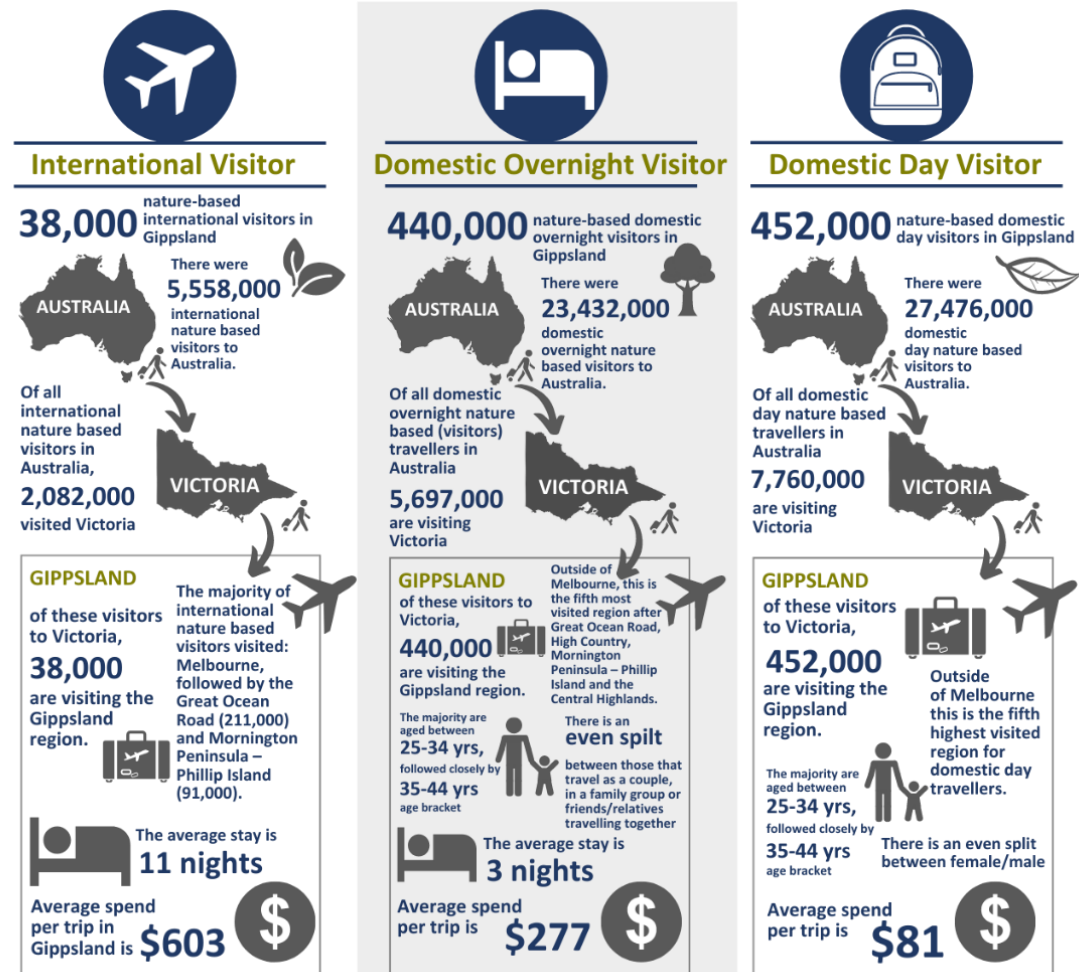
	7,287,000 up 3.2% on last year	76,000 International Overnight	-17.9%
		2,637,000 Domestic Overnight	+6.1%
		4,575,000 Domestic Daytrip	+2.0%
		12.4% share of regional Victoria	+0.2%
Tourism Nights			
	8,443,000 up 8.8% on last year	713,000 International Night	-7.1%
		7,730,000 Domestic Nights	+10.5%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

⁵ <https://www.visitgippsland.com.au/resources/travel-to-the-greater-gippsland-region-and-its-sub-regions-year-ending-march-20>

2.2.1 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 2019.⁶ See Figure 3.

Figure 3. Visitor Economy



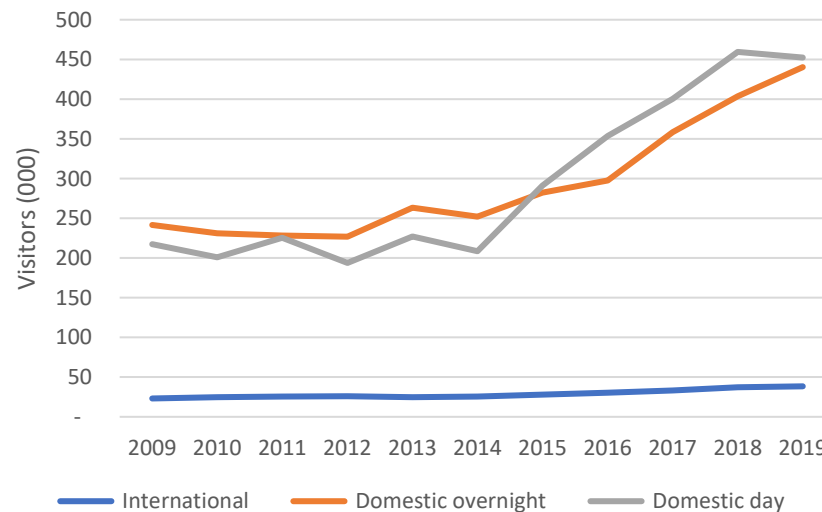
Visitors (4 yr average) Year End Dec 2019

⁶ TRA Year ending December 2009 to Year ending December 2019, 4 year averages

2.2.2 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).
- 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, 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.
- 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).

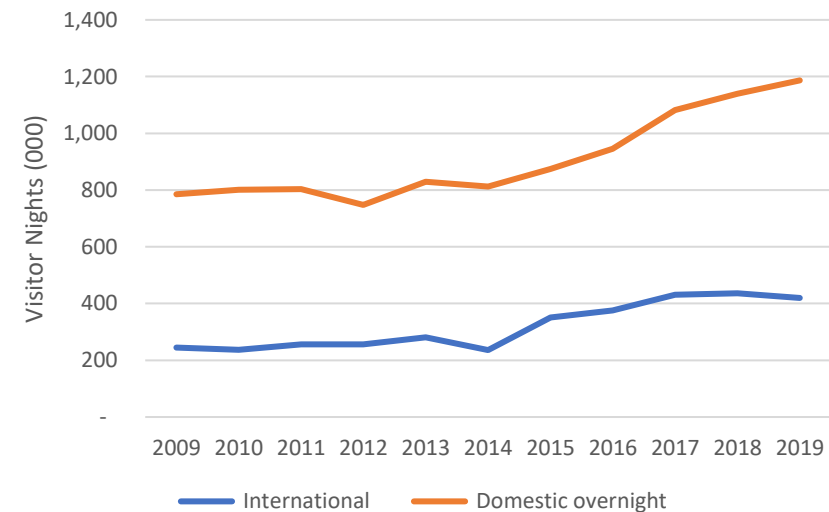
Table 1. Gippsland Nature Based Visitors – 4-year averages



2.2.3 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).
- 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).

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



2.3 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.⁷

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 2026.⁸

Figure 4. 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%).

⁷ www.mytravelresearch.com Understanding the Adventure Travel Market Report 2018

⁸ <https://www.alliedmarketresearch.com/adventure-tourism-market>

2.4 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 including 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.⁹
- 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.¹⁰
- 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.

⁹ www.tra.gov.au/Domestic/domestic-visitor-profiles

¹⁰ Adventure Travel Trade Association Report 2018-19

2.4.1 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 are no Great Walks of Australia in Victoria.

Due in part to the restricted availability, many of the Australian 'Great Walks' operated at or near 100% capacity, especially in peak periods.¹¹

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.

¹¹ 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.¹²

This presents a significant opportunity for Gippsland given Victoria has very little product supporting overnight walking experiences.

Although low volume, this is a very high value market segment.

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

2.4.2 Target Market Segments

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



Day Walkers



**Independent
overnight walkers
and walker groups**



**Supported
Overnight Walkers**



**Fully Facilitated
Walkers**

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.

¹² Carruthers, F., Former rivals Geoff Dixon and Brett Godfrey partner in walking tourism venture, Financial Review Magazine, 2016

2.5 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.¹³

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.

2.6 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, statewide 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.

¹³ Canoe Victoria Strategic Facilities Plan 2015-35.

2.7 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 2014.¹⁴

¹⁴ Domestic Arts Tourism – Connecting the Country 2020 – Australian Council for the Arts



2.8 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.

While cycling features only to limited degree amongst the draft suite of Gippsland Aquatic Trails, it remains a central feature to at least one of the four itineraries identified (Trail#4), purposely leveraging in concentration all of the existing off road and adventure cycling attractions of notable quality in the immediate Lakes Entrance region. A second itinerary (Trail#2) involves significant cycling sections while a third (Trail#3) has potential to incorporate an optional cycle leg if desired and proven feasible.

Recent evidence has shown more people getting out into nature as a result of recent Covid19 restrictions. This trend is likely to continue with more people interested in outdoor activities.

More resilient, and predominantly younger travellers will probably be the first to return to remoter and more adventurous destinations - gradually and in limited numbers. 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 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 recognised and unrecognised 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. 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.

Concurrently, there is an opportunity to strengthen the understanding of and connection to the Gunaikurnai amongst the broader Gippsland community, and realise the potential for ecocultural tourism business development for Gunaikurnai people.

Table 3. Core Target markets for the Gippsland Lakes Aquatic Trail

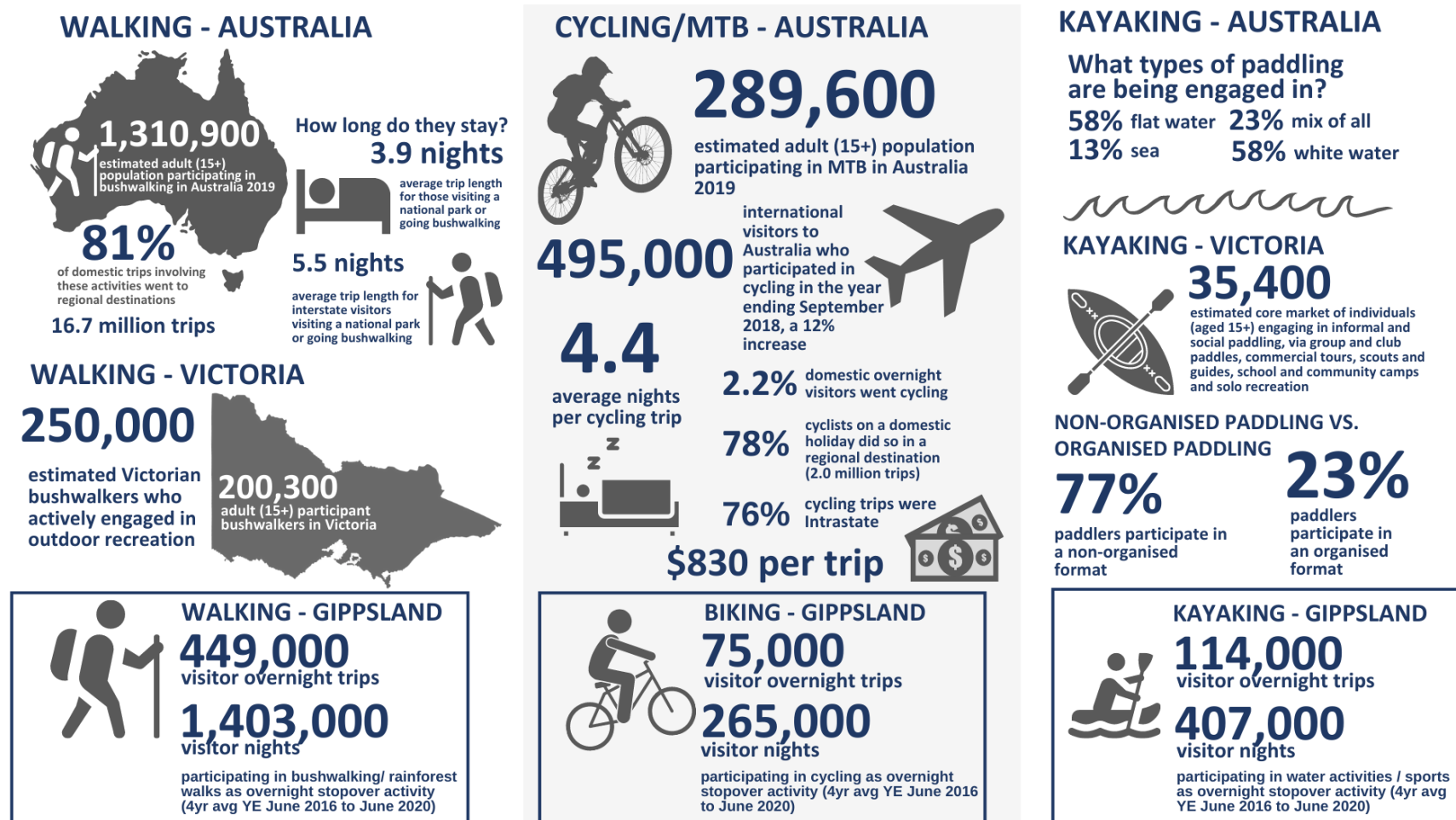
WALKER TYPE	NEEDS
Day walkers	• Distance: 20 minute walks up to 15–20 km day treks. • Demographic: Popular with almost all demographics and age groups, often caters for all levels of fitness and accessibility needs. Favoured by ‘Active Families’. • Expectations: Trailheads with clear signage, points 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: <i>Younger Adults, Women Travellers</i> and <i>Active 55+</i> 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: <i>Younger Adults, Women Travellers</i> and <i>Active 55+</i> 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 gradients 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) ¹⁵. • Expectations: Full commercial, seamless, all inclusive high quality guided experience. Comfortable through to luxury roofed 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.

¹⁵ Market review of current iconic trails with a 3-5 day length with quality accommodation options.

Table 4. 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 paddlecraft (i.e. sea kayak), with safety knowledge and ability to 'read' and respond to weather patterns and environment. Favoured by 'regular' padders, 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.

Figure 5. Walking, cycling and kayaking market comparison ¹⁶



¹⁶ 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 /

3 Case studies and critical factors for success

3.1 CASE STUDIES

The **Murray River Adventure Trail** is a multi-sport adventure trail that will extend along the length of the Murray River in NSW and VIC. Currently in development, it will incorporate walking, cycling (1040kms), kayaking/canoeing and other forms of water transport (1390kms).

Insights for the Gippsland Lakes Aquatic Trail include their focus on attracting investment and extending length of stay:

- Attracting investment in both public and private infrastructure.
- Creating employment opportunities in the initial construction and through the attraction and development of new tourism products associated with the trail.
- Attracting and extending the length of stay of 110,000 visitors to the Murray Region annually.
- It will be used 200,000 times per year by local residents.
- Generating annual output of \$12.8 million and 71 jobs per annum in the Murray Region economy.
- Delivering a Net Present Value (NPV) of \$34 million and a Benefit Cost Ratio (BCR) of 2.3.

The **Whitsunday Ngaro Sea Trail** in QLD is notable for its inclusion of self-guided sea-based paddling trails, land-based walking trails and having a strong First Nation/Ngaro cultural elements.

Insights for the Gippsland Lakes Aquatic Trail include their incorporation of cultural sites including:

- The Ngaro Cultural Site on Hook Island is a significant First Nation cultural interaction, featuring a rock shelter containing art motifs and extensive cultural deposits of the Ngaro people. The site also includes a boardwalk, viewing area and interpretive displays.
- Hosted cultural activities and an underwater art installation attraction.

The **Clarence Valley Canoe and Kayak Trail** in NSW launched in 2017 and includes eight sections.

Insights for the Gippsland Lakes Aquatic Trail include their multiple entry sites that include:

- Numerous camping site and a variety of sections with different paddling profiles and difficulty (from more difficult rapids upstream to flatwater paddling suitable for beginners downstream) offer a range of trip options.
- Council worked with landholders, Parks and Waterways management to design an experience that provided high quality self-guide information and encouraged local businesses to activate around the riverway experience.

The proposed **Ningaloo Sea Kayak Trail** in WA will offer a world- class sea kayaking destination offering shallow lagoons with marine life, sheltered behind one of the world’s largest fringing reefs.

Insights for the Gippsland Lakes Aquatic Trail include their planned private sector involvement:

- Providing increased opportunity for private sector involvement through commercial tour operators and equipment hire. Licensed tour operators strongly support this initiative and anticipate their business will grow with the sea kayak trail development.
- The route has been developed in a manner that integrates with other local/regional active experiences such as snorkelling and camping.

The **Te Ara Moana Sea Kayak Trail** in NZ is a self-guided five-day sea kayak tour linking numerous regional parks near Auckland.

Insights for the Gippsland Lakes Aquatic Trail include their appeal to a broad market:

- Paddle legs are 8-14km in distance, the route is noted as achievable for novices and for sit-on-top style craft, making it an appealing option for a broad visitor market. Users can complete shorter legs of the trail with vehicle access at most put-ins.

The 191km **Clarence Kayak Trail** is a ‘first’ for Tasmania, in terms of defining and facilitating single and multiday paddling experiences in and around the harbour, river and seaboard environments of the Derwent, near Hobart.

Insights for the Gippsland Lakes Aquatic Trail include their offering of sections along the route:

- The trail is divided into nine coastal sections from Risdon through to South Arm. Each trail sector includes information about the estimated distance and skill level required, what to see along the way, launch points, hazards and warnings, and facilities to access off the trail.

3.2 CRITICAL FACTORS FOR SUCCESS

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 a distinctive experience - something special and different from other places. They offer a strong overall experience that:

- showcases distinctive landscapes, natural or cultural landscapes and/or enable users to interact with cultures
- includes linked experiences and accommodation to add character and variety
- offer ways for visitors to immerse themselves in the area such as through Interpretation and storytelling to enable people to learn about the place and its people.

Successful multi day trails:

- are developed from a long term and bold vision
- offer an iconic or interesting and variable landscape context including changes in environment, terrain, altitude
- are based on market demand and proven commercial viability
- offer a suite of integrated high-quality experiences suited to different markets including options for trip length
- enable visitors to make choices about the style and setting for accommodation
- are driven through effective leadership and positive attitude from an agency, investor or community
- generally involve partnerships between community, private and public sector
- often leverage their positioning off existing successful destinations
- use a range of marketing techniques including social media and on-line activities to engage with visitors

Specifically, great trail-based experiences:

- offer diversity in experience and environment
- have limited overlap with busy visitor nodes
- feature a track designed to match the experience
- offer the opportunity for exclusive camping/accommodation
- provide choice in product options (independent, guided, supported) but all of an excellent standard
- showcase a point of difference from other products
- average walking distance 9-15km/day
- average paddling distance 15-20km/day
- average cycling distance 25-30km/day

Additional factors for a great aquatic trail?

- wildlife viewing
- sense of wilderness / remoteness
- attractive and protected landing zones, moorings, put-ins
- allow/slack tidal speeds
- protected shorelines
- natural feature attractions – viewpoints, swimming spots, landscape features of interest

4 The plan for the Gippsland Lakes Aquatic Trail

4.1 VISION AND GUIDING PRINCIPLES

The goal in developing the Gippsland Lakes Aquatic Trail will be to create an experience that achieves the following vision and delivers on the positioning of the trails in the marketplace. Guiding Principles are provided to guide the way the experience will be developed.

4.1.1 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 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 prescribed and/or curated itineraries
- well planned and managed infrastructure and effective governance
- Gunaikurnai and industry partnerships to deliver supported, interpreted and accommodated experiences.

4.1.2 Guiding principles

Aboriginal Participation

Opportunities align with aspirations of local Gunaikurnai people, 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 Trail

Trails comply with Australian / International standards, and meet and surpass visitor experiences and 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.

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.

4.2 CREATING A DISTINCTIVE VISITOR EXPERIENCE

4.2.1 What sets the Gippsland Lakes apart naturally?

Environment

- connectivity of ocean, lakes, rivers
- wilderness to towns
- cultural people, sites and stories
- marine and terrestrial flora and fauna

Experience

- multiple modes / activities, multi-faceted, scalable
- uncrowded, safe, immersive, real people and stories
- abundant accessible land-based trails
- relatively safe, low skill threshold paddling experiences
- relatively numerous existing or planned paddling infrastructure (kayak launch jetties)

4.2.2 What are the opportunities that can be created/leveraged?

- Choose Your Own Adventure - activity, length of trip, level of skill required, basic to luxe accommodation
- diversity of towns/settlements
- existing accommodation options within easy reach of lakes
- eco-camp / glamping development
- leveraging of new development resort (Seacombe)
- Gunaikurnai lands and storytelling
- leveraging existing attractions – nature parks, historical POIs, art & culture nodes (i.e. Nowa Nowa)
- leveraging existing infrastructure – walking trails, rail trails, MTB networks
- developing underutilised infrastructure - Rotamah Island homesteads, campsites
- revitalising / developing low quality or non-existent trails to improve and better link existing trail and nature-based experiences
- private partnerships and business development across accommodation and services (retail, tour, guide, rental)

4.3 POSITIONING STATEMENT

Gippsland Lakes Aquatic Trail: where the land and waters of the Gunaikurnai set the stage for an immersive journey of discovery and adventure in the Gippsland Lakes.

The positioning encompasses:

- land, waters and stories of the Gunaikurnai
- immersion in nature
- stage for 'choose-your-own' adventure

The goal will be to create a trail experience that delivers on this positioning.



HERO TRAIL: GUEST PROFILE

Married couple John (62) and Anne (61) are both working professionals, Anne owning her own management consultant business in retail, and John a consultant engineer mainly to government transport. They both are working towards achieving a four-day working week with a keen will to begin a slow career wind-down over the next ten years.

They are both fairly active with recent GP check-ups indicating good health. They also enjoy good food, wine and holidays. The latter they mix between organising themselves and two times a year they book into small group, high-service tours across wine, heritage (with engineering bents for John) and nature-based themes, always with some element of activity on most days.

With kids now adults and moved out of home they have more time (and money) for recreation, so they have spent the last four years re-engaging in activities, specifically those that take them into the natural environment. They no longer play organised sport (used to play competitive tennis), but remain social with their activities through an informal morning swim session at their city bayside beach, and are sometime members of a walking club (they only join up on club walks every other month). During COVID, they both purchased new bikes, which are semi-off road electric, suitable for urban pathways and rail trails.

Anne has always been a walker, having often trekked overseas in her youth. She has been the main driver behind the couple's walking club engagements and has been pushing for some bigger, walking-led holidays. Her one-day aim is to do the 'posh' version of the Overland "but I only want to carry a day pack!". She has developed an embryonic interest in birdlife and photography. Anne seeks out holiday experiences that are multi-layered, preferably ones that deliver some form of learning – about environment, history or culture. She has a passing interest in First Nations culture after visiting Alice Springs. She is aware that she is somewhat uneducated about aboriginal affairs, something she is reminded of each time she looks at the small Arrernte First Nation artist painting on her dining room wall, purchased in the Northern Territory on a walking holiday.

John remembers enjoying paddling in his youth, via scouts, school excursions and a fledgling period in his 20s where he briefly learned to eskimo roll. He didn't paddle throughout his 30s to early 50s with a busy career and other interests taking up his time. In his late fifties, he connected with another, more experienced ex-paddler in his bayside suburb, and has reignited his interest, specifically in flat water sea kayaking because he enjoys the journey aspect and that it is a non-competitive and social activity. He has since taken a few lessons at the local kayaking shed at his bayside wharf, but wouldn't consider himself overly proficient (no eskimo roll just yet) and would require guidance to be comfortable moving away from any shorelines. He does not yet own a kayak but hopes to get enough experience to warrant purchasing one.

Married since their early thirties, John and Anne are adept at choosing holidays that satisfy both of their convergent and differing needs for activity in the outdoors and other personal interests to feature in a trip. They are both socially confident and at ease in small groups of newly-met individuals with similar interests. As still professionally busy people, they see fully serviced holiday trips as a reward for hard work, where they don't have to organise, rather just enjoy the time away without having to think of logistics.

Destinations preferences pre-COVID were international at least once a year, interstate for two longer period holidays (one week), and intra state for one longer trip (one week) and several weekends / long weekends annually. They prefer to stay in mid to higher-end comfortable accommodation with some form of intimacy (i.e. boutique rather than large scale hotel). They will always scout out the best coffee in a destination and enjoy dining out most nights when on holiday. They prefer not to have to cook or prepare meals, but are comfortable with a hearty bakery lunch.

HERO TRAIL: TRIP ADVISOR REVIEW

“How to get your wife interested in paddling? Take her to the Gippsland Lakes, alternate the water time with some trail walking time, throw in some special ‘glamping’ where birdsong is the morning muse, a luxury lodge midway, add a dash of rich aboriginal history into the mix, and of course some amazing landscapes and pristine beach time. That’s how!

We were blown away by the diversity of the landscapes (and water-scapes) and how remote, raw but comfortable it all felt on our 4-day, 3-night tour of the Gippsland Aquatic Trail. Honestly, my vision of the Gippsland Lakes was tending towards flat, windy and a tad ‘what’s there to do?’, but was I proven ever so wrong!

The tone of the trip was truly well set when we were taken to the Gunaikurnai Interpretation Centre for a welcoming ceremony and half hour presentation by local First Nation representatives – in a bushland setting at a gateway location to Lakes Entrance, they introduced us to the history of the region – both tragic and inspirational (I didn’t know Lake Tyers represented such dispossession and also such hope in self-determination). We were told stories illustrating how the Gunaikurnai have cared for the lands here, and what cultural sights we’d explore on our trip. It lay such a great good foundation that absolutely enriched our experience later on in our trip.

After a (good) coffee enjoyed in town, we took a very relaxed stroll along the Esplanade of Lakes Entrance, which thankfully became more of a natural setting fairly quickly with views across the main Lake and towards the Entrance. Our guide pointed out the Entrance in the distance – we’d get to that tomorrow on water – I got excited. My wife got nervous looking at the open water.

The trail walk was great, especially once we crossed a new swing bridge that had Gunaikurnai art weaved into the engineering. My wife loved that – I was admittedly more intrigued with how they build the bridge (enough so small boats could still get into the inlet). The afternoon was spent arriving at and exploring the Nyerimilang Heritage Park – a one time working colonial property and other times rich man’s holiday home. Some good Gunaikurnai interpretation of the flora and fauna here, too, which reiterated what we’d been shown at the interp centre. The Heritage Lodge history was interesting to read up on, but the trails were the real treat here – lovely afternoon walks. Then came the first of a few accommodation treats – eco-camping. My wife and I are usually ‘roof over head’ holiday makers, but these were better than many hotel rooms I’ve stayed in! A distinct aboriginal art flavour, comfortable beds, bushland and water outlooks – and plenty of mozzie netting, thankfully. I can now legitimately say I enjoy camping.

Day two was a highlight for me, being I’m just getting back in to paddling. Kayaking a full loop of Rigby Island allowed us in to stunning small sandy beaches and coves, along with a pit stop to walk the western wall of The Entrance – we even caught sight of a seal frolicking in the standing waves as the tide turned. Apparently, dolphins are also sighted sometimes, but not for us. The return paddle gave a different perspective from the water Lakes Entrance and yesterday’s walk.

The next morning’s boat ride allowed us to ease into the morning post breakfast. I went easy on seconds as we’d been pre warned that we had a half hour stop-over at the rather idyllic waterside village of Metung, where I duly checked out the bakery and had a second coffee (also good! Small towns get a Melbourne’s love of coffee these days!). Pity the pub wasn’t open – looked great overlooking the pier where we docked.

After transferring to the ominously named Mosquito Point across from Metung, my wife was happy to be walking trails again through wetlands and heathlands until we reached the real jewel (at least for me): Bunga Arm. Here a raft of kayaks awaited us, and a sensational rest of day paddle down the protected ‘Arm’ stopping off at pristine beaches with shallow landings (we stopped at one for a lovely picnic lunch in the shade). Bunga is a corridor of water protected from the ocean by a strip of dunes and shrublands that hide a number of isolated campsites (I’ll come back to explore those one day, now I’m a camper!). Late afternoon after paddling calm water past small islands and we arrived at Ocean Grange, a strange (in a good way), isolated village (no shops or main street!) where we made our way to the Ocean Grange Beach House – with its own turret and space for the entire group, it has to be the best accommodation in Gippsland! Actually we didn’t want to leave next morning – I could stay there a few days and just explore the lake islands and try my skills at the Stand Up Paddleboards they had to use.

On our final day, we enjoyed a morning walk along the famous Ninety Mile Beach – thankfully only a mile or so of it though (stunning as it was). Our walk took us to a place my wife was excited about – big camera lens out – Rotamah Island which is where Birds Australia set up an observatory. Then it was a boat transfer to Sperm Whale Head and Point Wilson, more walking on trail exploring small lakes and hinterland, afternoon tea, and another boat ride back to the trip’s end at Loch Sport, another small village set on slivers of land between lakes and ocean. I was told by our guide that some people paddle all the way back from Ocean Grange – think I’ll be back to do exactly that, maybe with a few more nights at Ocean Grange thrown in.

Highly recommend the Gippsland Aquatic trail – a great way to mix up a holiday with various activities, sights and cultural delights, while sleeping comfortably and learning a lot about a place I once had little interest in – but then, as a paddler, it’s now a bit of a hot spot in my mind. I’ll be back. Guided or otherwise.” – John, Brighton, Victoria, 62.

5 The Experience

5.1 THE TRAIL EXPERIENCES

The concept for the Gippsland Lakes Aquatic Trail is to highlight one signature experience that could be delivered in full by a commercial operator. This is complemented by a series of alternative itineraries that service a broad range of active interests and skill levels, feature different degrees of challenge and activity, and explore a range of landscapes and highlight features 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 bring brand.

5.2 THE SIGNATURE EXPERIENCE:

Trail #1: 4-day, 3-nights

The Gippsland Aquatic Trail introduces visitors to the unique landscapes and aquatic environments of the Gippsland Lakes on a four-day, three-night journey undertaken on foot, by kayak and boat transfer, staying overnight in comfort at eco-cabins and lodges.

A visit to the Gunaikurnai Centre, Gallery and Café near Kalimna introduces visitors to Gunaikurnai culture and the Country cared for by them over thousands of years. The active itinerary then begins in Lakes Entrance with a stroll along the famous esplanade dotted with fishing boat marinas and moorings. Further along are views south toward 'The Entrance' for which the area is named. The Kalimna Jetty Walk extends across Bancroft Bay via a new pedestrian bridge to Nyerimilang Park, featuring a historic homestead, wildlife and walking tracks to be explored further in the afternoon.

Day Two 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.

A boat transfer on day three includes a morning tea stop-off at 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 in the afternoon at Ocean Grange, a unique seaside community enclave where sunset drinks are enjoyed at a lodge (or eco-camp).

The final leg of the aquatic journey includes a morning walk along the 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.

From Rotamah, visitors are picked up by boat transfer taking them first to Point Wilson on Sperm Whale Head, where a short loop walk explores the hinterland inhabited by an abundance of wildlife including kangaroos, wallabies and a diverse range of birdlife. The boat will then transfer guests to the journey's conclusion at Loch Sport, via the northern shoreline of Sperm Whale Head. A swim can be enjoyed en route at the local favourite spot.

Alighting at the small holiday village of Loch Sport, guests can opt for an extra night at a nearby spa and wellness retreat, or be transferred back to Lakes Entrance via minibus.

5.3 OTHER AQUATIC TRAIL ITINERARIES

Four other itineraries have been developed in draft, guided by the principles that itineraries and routes should:

- focus on highlight landscapes, flora and fauna
- feature and link to logical and unique Points of Interest (POIs) to keep the visitor engaged
- connect to Gunaikurnai community, culture and First Nation experiences where possible
- feature activity (i.e. walk, ride, paddle) leg/section distances that are logical and appealing to the target markets
- offer a range of engagement modes from independent, self-sufficient through the spectrum to semi-supported and fully supported experiences
- be designed in a way that allows visitors to 'curate' their own itinerary in addition to following suggested itineraries
- as a priority, target the leveraging of existing trail networks and infrastructure where the experience remains of high quality
- give impetus to reinvigorate sub-standard trails or develop new trails and infrastructure where the guiding principle of delivering a high-quality experience demands such investment
- link in to existing accommodation nodes and facilities (towns, camps) where possible
- explore potential for development of environmentally sensitive eco-camp nodes where feasible
- inspire and enable the initiation and further development of businesses i.e. tours, equipment hire, accommodation

A full breakdown of the four added draft itineraries can be seen in Appendix A.

These itineraries will be refined in the next stage of this project.

In brief, the Supporting Aquatic trails are:

Trail#2: Paynesville-Eagle Point-Raymond Island

This pick-n-mix introductory trail connects the townships of Eagle Point and Paynesville with Raymond Island and Sunset Cove, keeping activities accessible, relatively short and easy to engage in for all visitors. Over three days and two night, visitors explore north from Paynesville to Eagle Point and out along the Mitchell River Silt Jetties, with a short walk interlude at Eagle Point. A paddle excursion explores the shores of Raymond Island with a sunset walk to Sunset Cove rounding out the day. Raymond Island is the focus of the final day with a walk or ride through koala territory and an optional Stand Up Paddle Board for the more active.

NB: A pre or post-trip visit to the Gunaikurnai Centre, Gallery and Café will be highly recommended to introduce visitors to Gunaikurnai culture and the Country cared for by them over thousands of years. This will give visitors a greater appreciation of the waterways and landscapes through which they have journeyed or will journey through.

Trail#3: Loch Sport-Sperm Whale Head-Rotamah Island-Ocean Grange

This four-day, three-night excursion focuses on the highlight lake and island landscapes centred on Sperm Whale Head and Rotamah Island, with flexibility to be either paddle- or walk-centric pending preferences. The paddling heavy itinerary allows intimate exploration of endless number of remote Lakeland beaches and inlets, while the walking version explores the hinterland of Sperm Whale Head. Both dive into the birdwatching wonderland of Rotamah, the wild stretches of Ninety Mile Beach and enjoy overnights there and at Ocean Grange.

NB: A pre or post-trip visit to the Centre, Gallery and Café near Kalimna will be highly recommended to introduce visitors to Gunaikurnai culture and the Country cared for by them over thousands of years. This will give visitors a greater appreciation of the waterways and landscapes through which they have journeyed or will journey through.

Trail#4: Lakes Entrance-Nowa Nowa-Lake Tyers

This aquatic trail focuses heavily on the tributary river waters of Lake Tyers, but not before exploring two of Lakes Entrance's best rail trails with options to explore the existing singletrack of two mountain biking parks: Colquhoun and Nowa Nowa. The latter township offers ample complimentary attractions and activities with artistic studio visits and sculpture walks. There are camping and Stand Up Paddle Boarding experiences en route, with a final day walk that links Lake Tyers Beach to Lakes Entrance via a wild surf beach and cliff walk.

NB: This itinerary can begin with a visit to the Gunaikurnai Forestec Interpretation Centre to introduce visitors to Gunaikurnai culture and the Country cared for by them over thousands of years. This will give visitors a greater appreciation of the waterways and landscapes through which they will journey through. The Forestec location also is a preferable beginning for the first cycle leg of this itinerary, negating the alternative first stage cycle route from Lakes Entrance to the beginning of the rail trail, which passes along non-desirable road and roadside sections.

Trail#5: Port of Sale-Lake Wellington

Departing from the historic Port of Sale, this 2-day tour is perhaps the most genteel of the suite with flexibility as to how active visitors prefer to be.

The journey begins from the heading downstream to the landmark Swing Bridge (1890). Visitors can choose from boarding a heritage cruise on the Rubeena (1912) 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.

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. The landscape – Brayakooloong Country – is a feature of the famous Bataluk Cultural Trail with numerous points of cultural and historical interest, including scar trees.

Back on water – visitors can elect to transfer to kayak for the remainder of the day or remain on the boat – the journey continues past ancient river redgums that form part of a Ramsar-listed wetlands abutting the river.

Downstream on the Latrobe River, guests arrive at the Heart Morass Wetlands landing. Here, paddling guests return to boat transfer to be whisked across Lake Wellington to the new Nunduck Spa Retreat, Seacombe, for a night of luxury treatment.

A morning of relaxation is followed by a transfer back to Heart Morass landing, where guests undertake a ride back along the banks of the Latrobe, eventually 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.

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

The Gippsland Lakes experience lends itself to offering a diversity of accommodation options for visitors to choose their own adventure. Accommodation can be planned for all on trail / en route, or transfers can be planned on/off route each day from trailheads in order to access greater variety of township and other commercial accommodation options available in region.

The following are proposed:

Public private partnership model

- pursuing establishment of eco tents or eco-cabins at Nyerimilang Homestead – private sector site lease on public land [Trail#1]
- pursuing establishment of eco tents or eco-cabins at Steamers Landing or nearby Ocean Grange – private sector site lease on public land [Trail#1,3]
- 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 [Trail#1,3]
- pursuing establishment of eco tents or eco-cabins at north-east arm of Lake Tyers/Boggy Creek (i.e. Ironbark, Trident, or Glasshouse) – private sector site lease on public land [Trail#4]
-

Private sector off track accommodation model

- 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 Nunduck Spa Retreat, Seacombe and/or Metung wellbeing resort [NB: Nunduck Spa Retreat included in Trail#5 itinerary, but can be added to Trail#1 or #3]
- various commercial campsites (holiday parks) at Lakes Entrance, Paynesville, Eagle Point, Loch Sport, Nowa Nowa, Lake Tyers Beach.

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), Ironbark, Trident, or Glasshouse.

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 (Ironbark, Trident, or Glasshouse).

5.5 VISITOR NODES / TRAIL HEAD – REQUIREMENTS

Gunaikurnai Gallery and Café (VIC / cultural gateway)

This centre will act as a ‘gateway’ introduction to all aquatic trails 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. It will facilitate travel with required information. For Trail#5 this centre acts as a physical trailhead, while for others (facilitated or independent) it is a suggested ‘first-stop’ destination prior to transfer to trailheads proper.

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

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: Gunaikurnai interpretation / experience design; establishment of eco-camping or other accommodation.

Ocean Grange (accommodation/activity)

Ocean Grange is a significant overnight accommodation node and potential activity node for Trails#1 and #3. There is potential to establish major lodge-style accommodation 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: Investigations into purchase (public/private or private) of Ocean Grange Homestead as an operational lodge; investigation of potential siting and feasibility of eco-camp site and operation; planning for kayak and SUP equipment transfers to/from Ocean Grange (including delivery of kayaks to Bunga Arm put in for kayak leg); docking facilities suitable for kayak and/or boat transfer.

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.

Sperm Whale Head incl. 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). 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.

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.

Nunduck Spa Retreat (accommodation)

Attached to Trail#5 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 highlight stay on 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.

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, as identified from desktop review. Some kayak-only docking points do not require infrastructure when located at safe, shallow sand shore access points.

Potential new docking infrastructure may be required at:

- Bunga Arm (likely shallow sand beach landing/put in)
- Ironbark (Trail#4 – 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 (Nunduck 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.

5.6 SIGNAGE - INTERPRETATION

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 (local trail mapping). 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 mapboards or wayfinding specific to the aquatic trails.

Interpretation will be the major focus of any signage infrastructure development, in order 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.

5.6.1 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 inspirational content and directional/faciliatory, inclusive 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 situ / location: consideration may be given to inexpensive brand icon markers and Q-codes placed at relevant sites along routes (i.e. at kayak put-in/docking sites or added to existing trailhead mapboards) to 'remind' visitors they are on a 'brand' trail. Mapboards may be created for a major welcome node such as Gunaikurnai Forestec Centre.

5.6.2 Interpretation will be:

Gunaikurnai Forestec Centre – major mapboards and interpretation for all Gippsland Aquatic Trails Suite, serving as a planning and inspiration board for intending and prospective users. Potential separate mapboard focusing on Trail #5 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, using Aquatic Trail implementation as impetus. Include repeat of Trail#5 mapboard.

Bung Yarnda / Lake Tyers Mission - review of current signage and visitor experience interpretation. Potential to refresh, using Aquatic Trail implementation as impetus. Cultural/Gunaikurnai cultural and historical focus.

Kalimna Jetty – potential secondary mapboard focusing on brand and Trail#1 mapboard focus.

Ocean Grange – potential secondary mapboard focusing on brand and Trail#1+#3 mapboard focus, inclusive of nearby waterway and island activity zone mapping and cultural touchpoints.

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 POIs.

5.7 TRAIL INFRASTRUCTURE

Routes have been predicated predominantly on existing and quality trail networks in order to minimize new trail build requirements and costs. Early identification of potential trail build or improvements include:

Kalimna-Nyerimilang Pedestrian Bridge (Trail#1)

A new pedestrian bridge is required to link Kalimna Jetty Walk with the Nyerimilang node, via crossing Maringa Creek delta.

REQUIREMENTS: new trail build on eastern shore of Bancroft Bay Reserve, from Kalimna Jetty to crossing point / new bridge build; new pedestrian bridge and new section of trail (swing or pontoon – boating traffic TBC).

Red Bluff – Lake Bunga new trail link (Trail #4)

Missing section of trail to link existing Red Bluff trails (existing on eastern side through to Cliff Rd on west side) down to beach for access to Lake Bunga sandbar crossing to Lakes Entrance.

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

Latrobe Riverside Ride (Trail#5)

Investigations required at two points, including Flooding Creek segment. Potential trail upgrades required.

Gunaikurnai Gallery and Cafe to Gippsland Discovery Trail Ride (Trail#4)

The first section of the ride segment for Trail #4 gives riders the option to use existing MTB singletrack or a non-technical route along either Uncles Road or Limestone Box Forest Track, the latter requiring investigations as to suitability for non-technical cycling.

REQUIREMENTS: Potential requirement for trail upgrade and/or widening.

Sperm Whale Head (Trails #1 and #3)

While most walking trails on itineraries #1 and #3 utilise existing trail, an optional ride segment for the finale return leg to Loch Sport from Pt Wilson could be investigated. Trail audits required to assess for useability.

REQUIREMENTS: potential trail surfacing upgrade and/or new trail build suitable for cycling. *This would also prove a popular trail for general cycling use accessing Pt Wilson from Loch Sport.

5.8 SERVICES

Critical services will include:

- information facilitating itineraries including websites, route mapping and downloads, guides, transport, accommodation and service contacts (all trails)
- Gunaikurnai Visitor Information Centre / Interpretation Centre (all trails)
- boat operator/water taxi to transport people and/or luggage between trailheads and overnight stays (Trails #1,3,5).
- commercial operators offering integrated adventure packages (all trails)
- Gunaikurnai guides / storytelling. Potential sites include: Gunaikurnai Forestec Centre, Nowa Nowa, Bung Yarnda / Lake Tyers Mission, Nyerimilang, Rotamah Island, Sperm Whale Head/Pt Wilson; Sale Common Wetlands; Eagle Point
- qualified activity guides (bike, paddle, walk; potential all trails)
- kayak and other paddle equipment hire and/or sales (all trails)
- bike hire, service and equipment (potential all trails)
- hospitality – accommodation, food, beverage (all trails)
- land transfer options (bike friendly; for guests and equipment; all trails)
- kayak transfer service (Ocean Grange to Bunga Arm put in)

Non-critical services will include:

- other activity operators i.e. Stand Up Paddle Board rental (Trails #1,2,3,4)
- other attractions (MTB trails, Sculpture Walk, art galleries, food and bev attractions, events; all trails)

5.9 ABORIGINAL BUSINESS

- Gunaikurnai Visitor Information Centre / Interpretation Centre (all trails)
- Bung Yarnda / Lake Tyers Mission (Trail #4)
- interpretive and cultural experiences at Eagle Point, Nyerimilang, Rotamah Island, Sperm Whale Head/Pt Wilson (all trails)



6 Gippsland Lakes Aquatic Trail Visitor Use 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. The details of the analysis are contained in Appendix C.

Table 5. Participation Rates Sports 2019 Financial Year¹⁷

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%

¹⁷ AusPlay survey results July 2019 - June 2020

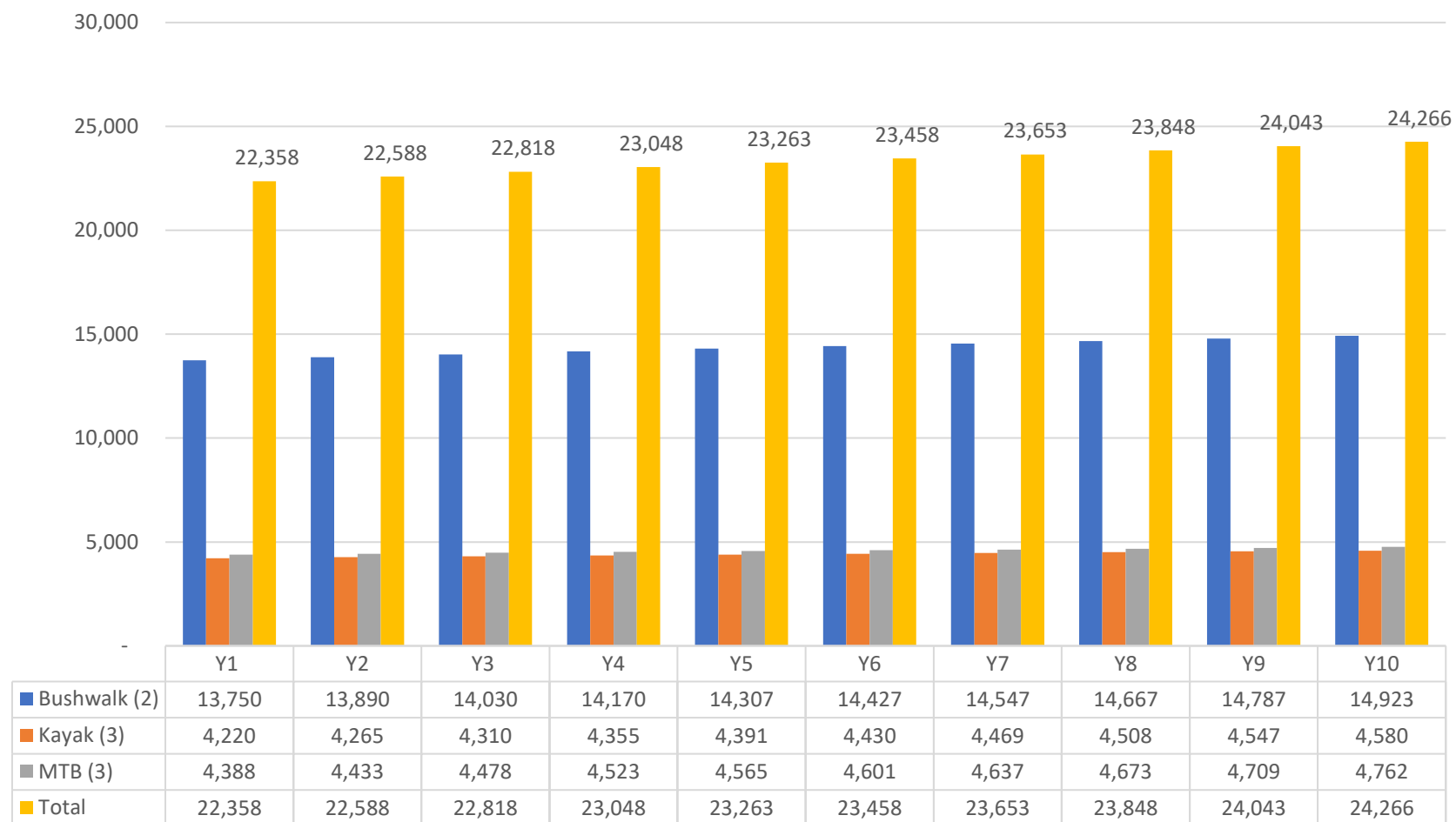
6.1 LOCAL POPULATION

The following are estimates of local users of the Gippsland Aquatic Trail. They are based on the analysis outlined in section 1. Note trail users from other adjacent LGAs are assumed to be included in the domestic day visitor estimates.

Table 6. 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

Table 7. Local Users of Gippsland Aquatic Trail (East Gipps & Wellington LGAs) – Estimates (no.)¹⁸



¹⁸ MCA estimates & analysis, November 2020. Brackets() = uses per year.

6.2 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 2009-2020¹⁹

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 ²⁰

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

¹⁹ 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

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

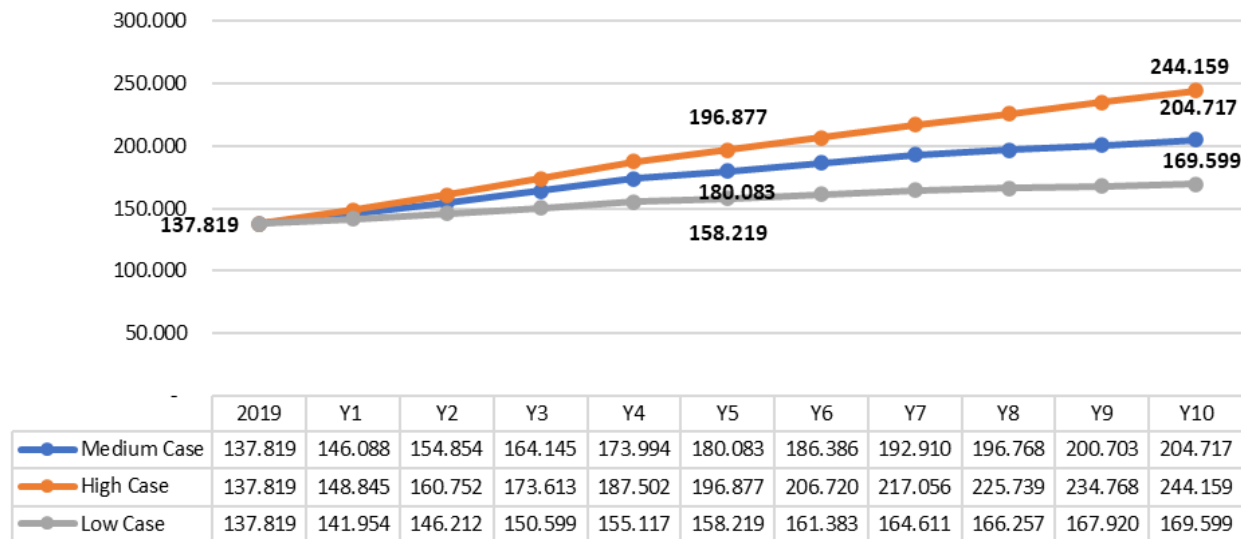
The following are projected number of tourist visitors who may use the trail. The visitor numbers are for the two LGAs where the lakes are located (East Gippsland LGA and Wellington LGA). They show the scope of the market for the Trail.

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 visitor²¹

Table 10. Assumed Growth Rates for Tourist Visitors²²

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 6. Potential Visitor Market for the Gippsland Aquatic Trail ('000)²³



²¹ Note 2020 is not included due to the impacts of COVID-19 and the restrictions on travel from early 2020.

²² MCA Assumptions, November 2020

²³ MCA estimates & analysis, November 2020

Table 11. Potential Visitor Market for the Gippsland Aquatic Trail ('000)²⁴

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).

²⁴ MCA estimates & analysis , November 2020

7 IMPLEMENTATION

PHASE 1
Trail Audit / Data Collation - Land based trail audit, GPX and associated data - Mapping - Detailed infrastructure gap analysis - Facilities audit - Detailed POI identification - Cultural and environmental issues identification – high level - Safety issue identification - Water activity specialist to audit waterway routes (safety and environmental issues identification)
Stakeholder Consultation Routes – input general – LGA, Destination Gippsland, gatekeeper organisations, experts
Detailed partnerships consultations - Associated commercial partnerships and services suppliers - Cultural partnerships - Government partnerships – local, state (VV), national (?)
Route consolidation – finalisation Based on outputs from trail audit and further stakeholder/partnerships consultations
Experience design and service support finalisation Based on outputs from trail audit and further stakeholder/partnerships consultations
Gap Analysis Infrastructure
Costing - Infrastructure - Cost benefit analysis

PHASE 2
Final Experience and Trail Design
Funding Sources for development, build, management ongoing
Capital works planning and implementation - Infrastructure - Management / responsibility
Brand and facilitation collateral development - Brand & Marketing Plan - Facilitation information – guides, route descriptors, safety etc - Content productions – imagery, marketing collateral
Governance and Land Management review - Permitting and licencing - Liabilities - Ongoing funding - Lead agency to take ownership and coordinate between agencies
Launch - Public launch - Operational

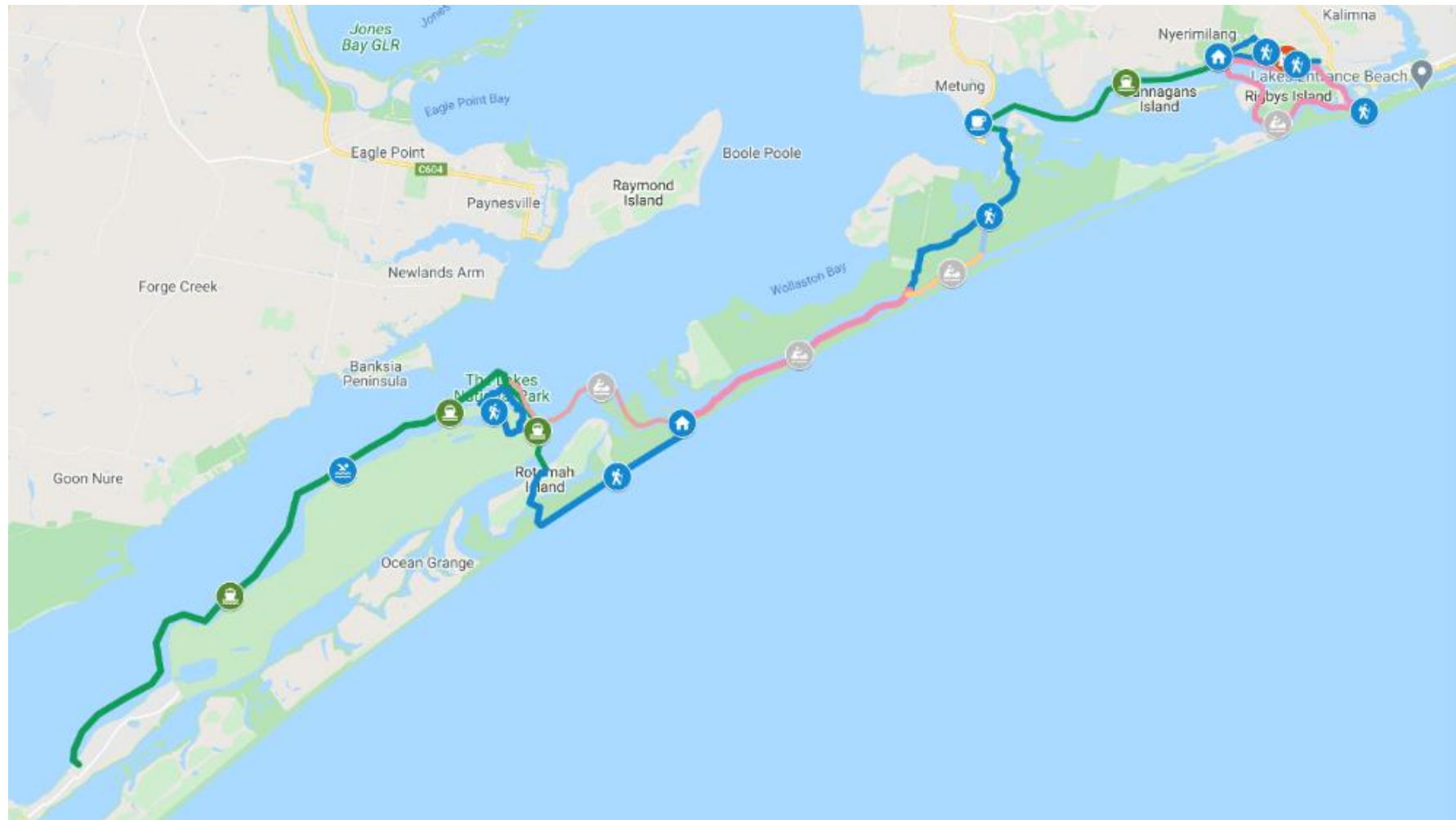


Appendix A. Details of Journeys

GIPPSLAND AQUATIC TRAIL – HERO TRAIL #1

STARTS	Myer Street Jetty / Rotunda, Lakes Entrance		
FINISHES	Loch Sport		
DAYS / NIGHTS	4/3		
RATING	Easy		
SECTIONS OVERVIEW	• Walk: 5 • Paddle: 2 • Boat transfer: 3 • Bus transfer: 1 • Alternatives: 1 x paddle (day 4), 1 x ride (potential; day 3) • Optional add-ons: Wild Swim, Stand Up Paddle Board, birdwatching • Other interactions: Cultural / Gunaikurnai First Nation; potential spa/wellness retreat at finish		
SECTIONS ITINERARY	• DAY 1: Walk > • DAY 2: Paddle > Walk > Paddle • DAY 3: Boat Transfer > Walk > Paddle > • DAY 4: Walk [Paddle] > Boat Transfer > Walk > Boat Transfer [Swim] > Bus transfer		
SECTIONS DISTANCES	DAY	ACTIVITY	DISTANCE
	1. Lakes Entrance - Nyerimilang	Walk <i>Walk (optional)</i>	7km 4km
	2. Nyerimilang – Rigbys Island Loop – Nyerimilang	Paddle Walk	9km 1km
	3. Nyerimilang – Metung – Mosquito Point – Bunga Arm – Ocean Grange	Boat transfer Walk Paddle	8km 4km 9.5km
	4. Ocean Grange – Ninety Mile Beach – Rotamah Island – Pt Wilson (Sperm Whale Head) – Loch Sport	Walk Boat Transfer <i>[ALT: paddle replace walk + transfer]</i> Walk Boat Transfer	6.5km 2.5km <i>[7.5km]</i> 4km 17km
ACCOMMODATION	• Nights 1+2: Nyerimilang > Heritage Park sited Eco-Cabins or nearby private land Eco-Cabins [to be developed]/ ALT: Fraser Island [existing – requires transfer Nyerimilang > Fraser] • Night 3: Ocean Grange - property purchase required www.shorturl.at/yM256 ALT: Ocean Grange Eco-Cabins [to be developed] • Extension Night 4: Loch Sport [private?] or Seacombe [new spa resort to be built]		

MAP



<https://www.google.com/maps/d/u/1/edit?mid=1kPrF7sHx1S5bWL2iBse3JkyLUJ4fUQsF&usp=sharing>

[ALL TRAILS incl trails #1 (hero) - #5)

<https://www.google.com/maps/d/u/1/edit?mid=144F8mNev5S2sFBBPQQgsfnH0yx9BKIVF&usp=sharing>

[HERO TRAIL ONLY – Layered by Days]

OVERVIEW

The Gippsland Aquatic Trail introduces visitors to the unique landscapes and aquatic environments of the Gippsland Lakes on a four-day, three-night journey undertaken on foot, by kayak and boat transfer, staying overnight in comfort at eco-cabins and lodges.

The point-to-point route begins at Lakes Entrance with a stroll along the famous esplanade dotted with fishing boat marinas and moorings. Further along are views south toward 'The Entrance' for which the area is named. The Kalimna Jetty Walk extends across Bancroft Bay via a new pedestrian bridge to Nyerimilang Park, featuring a historic homestead, wildlife and walking tracks to be explored further in the afternoon.

Day Two is spent mostly on water, completing a kayaking loop of Rigby's 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.

A boat transfer on day three includes a morning tea stop-off at 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 in the afternoon at Ocean Grange, a unique seaside community enclave where sunset drinks are enjoyed at a lodge (or eco-camp).

The final leg of the aquatic journey includes a morning walk along the 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.

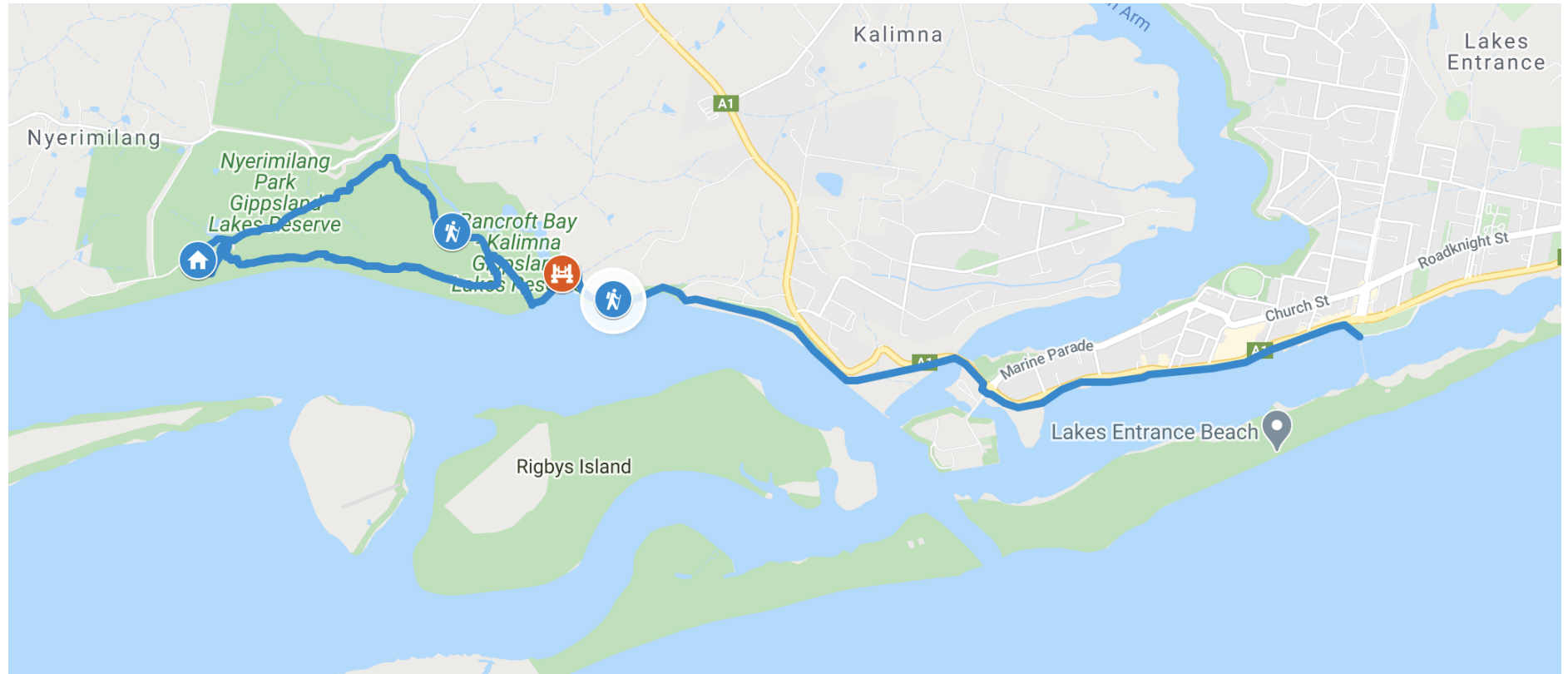
From Rotamah, visitors are picked up by boat transfer taking them first to Point Wilson on Sperm Whale Head, where a short loop walk explores the hinterland inhabited by an abundance of wildlife including kangaroos, wallabies and a diverse range of birdlife. The boat will then transfer guests to the journey's conclusion at Loch Sport, via the northern shoreline of Sperm Whale Head. A wild swim can be enjoyed en route at the local favourite spot.

Alighting at the small holiday village of Loch Sport, guests can opt for an extra night at a nearby spa and wellness retreat, or be transferred back to Lakes Entrance via mini-bus.

SECTION BREAKDOWN

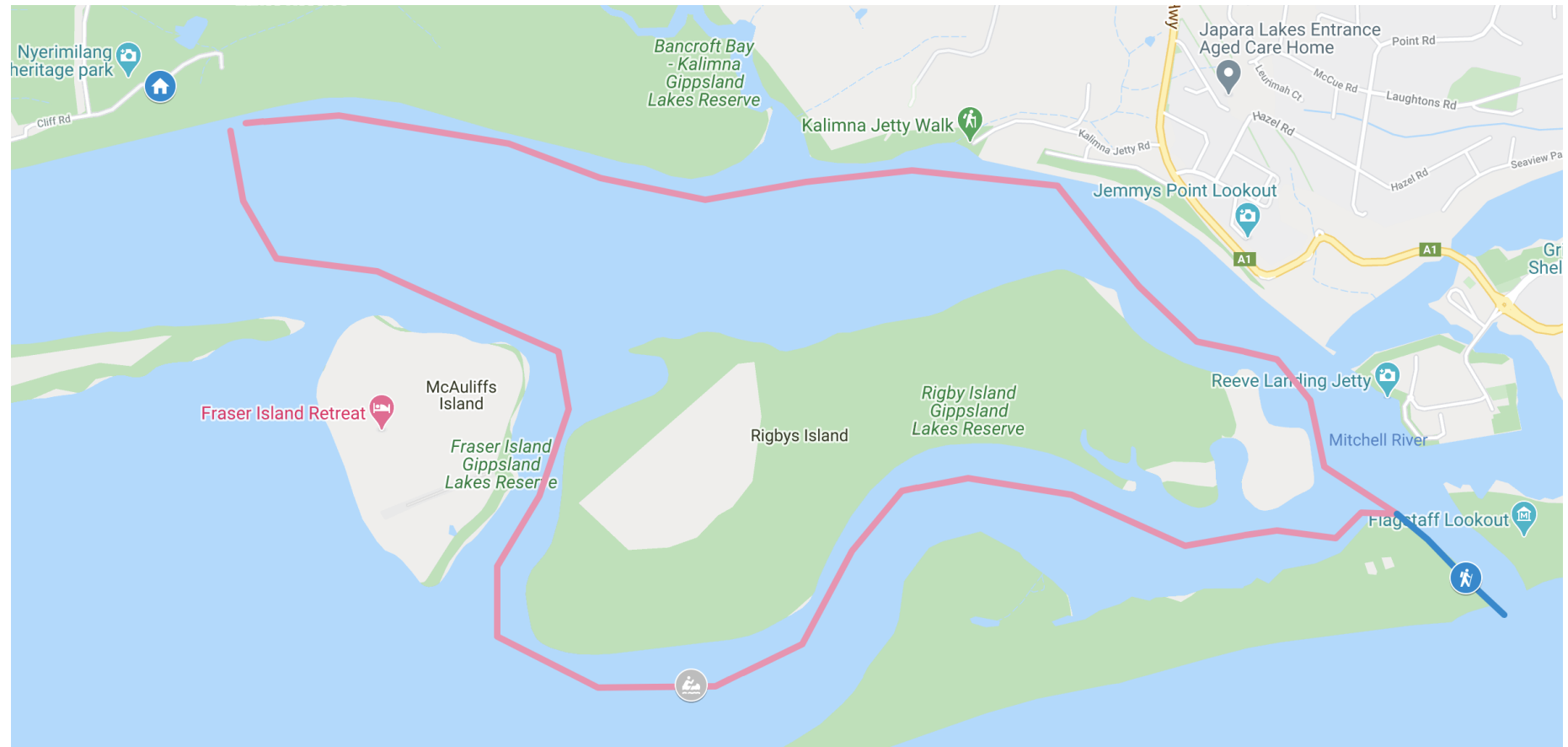
DAY	SECTION	DESCRIPTION	SECTION ISSUES / OPPORTUNITIES
1	Walk 7km + 4km optional	Beginning at Myer Street Jetty / Lakes Entrance Rotunda, just opposite the Main Beach Walk, guests walk west along a pathway adjoining the far-east arm of Lake King and a line-up of fishing boat jetties and moorings. The pathway parallels west the Princes Hwy, crossing Bullock Island Rd and 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 Rigbys island, around which guests will paddle the following day. A NEW 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 explore the homestead, relax in the manicured gardens or perhaps explore further the full Nyerimilang Loop Walk (4km) before retiring to the comforts of the Eco-Cain accommodation [site TBC], 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. Crown land corridor potential. • 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. • Opportunity to leverage First Nation/ Gunaikurnai cultural storytelling at Nyerimilang?
	Accommodation	Eco-Cain accommodation Nyerimilang [site TBC], 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. Question of whether to establish within Nyerimilang Heritage Park or external to Park, on private property nearby (challenge of continuity of service if private). • Alternative accommodation on Fraser Island requires boat transfer. Could this be supplied by Fraser Island?

MAP DAY 1



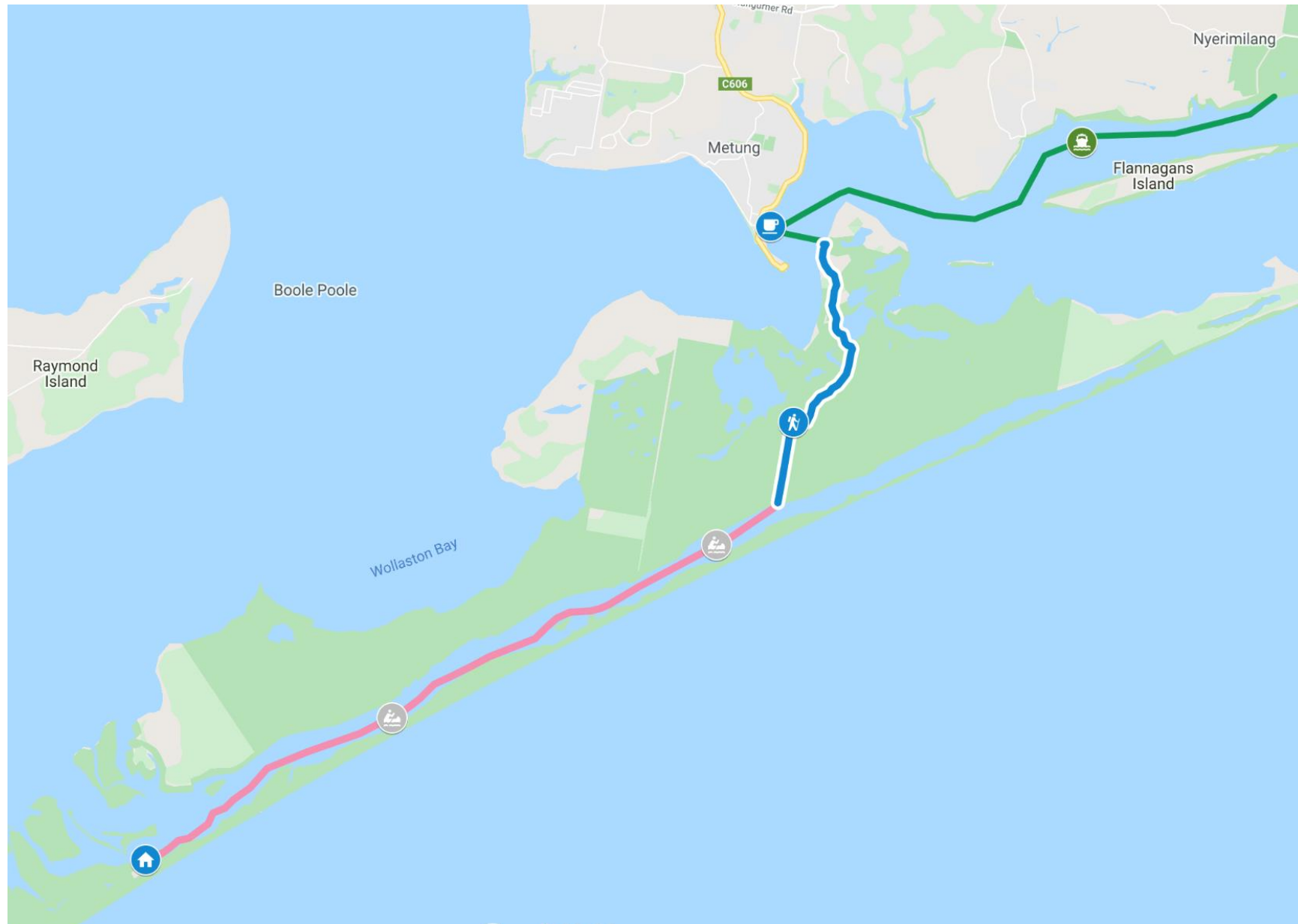
DAY	SECTION	DESCRIPTION	SECTION ISSUES & OPPORTUNITIES
2	Paddle 9km	Guests board kayaks at Nyerimilang Jetty, and with circumnavigation direction TBC according to tidal flow movements, paddle in a loop around Rigbys Island. Stops can be taken on the reserve proper, with a halfway stop planned to explore 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? - Potential for Stand Up Paddle Board (optional afternoon activity) offering at Nyerimilang – at Bancroft Bay?
	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

MAP DAY 2



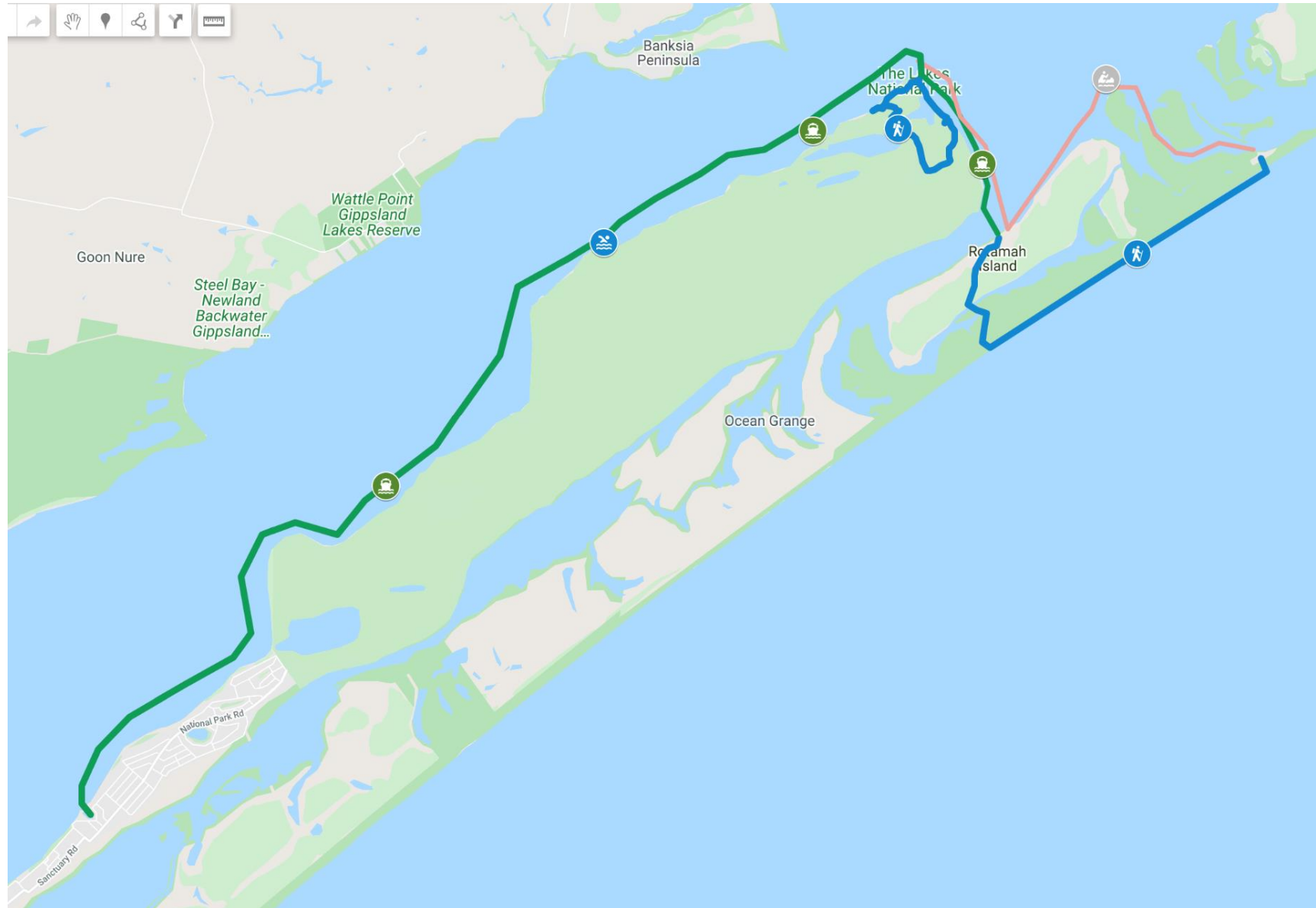
DAY	SECTION	DESCRIPTION	SECTION ISSUES & OPPORTUNITIES
3	Boat Transfer	A morning boat ride transfers guests to the small village of Metung and a quick morning tea, before re-boarding and landing at a public jetty at Mosquito Point, located just across the waterway east from Metung.	- Boat operator? Viability? - 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 their kayaks await.	No issues.
	Paddle 9.5km	Bunga Arm is known as a paddling beauty spot, fringed with white sand beaches and protected paddling. Along the 7.5km 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. Afternoon to relax, explore Ninety Mile Beach, or optional other activities (Stand Up Paddle Boarding, swimming, birdwatching)	- Logistics of kayak delivery TBC. Boat operator? Viability? - Site for lunch stop TBC. - Foul weather contingency? - Potential to add optional Stand Up Paddle Boarding activity at Ocean Grange to explore islands across. - Potential to promote wild swimming activity at lunch stop or Ocean Grange (lake side).
	Accommodation	Opportunity to leverage Ocean Grange By The Beach as accommodation. Currently for sale. http://oceangrangebythebeach.com.au Alternative option to establish Eco-cabins nearby Ocean Grange, site TBC.	- Issue of access to Ocean Grange By The Beach – currently for sale (opportunity?). How to retain for ongoing accommodation access if not control over site? - Site selection and permits, enviro and cultural considerations should Eco-Cabins be required? Who will invest? Who will manage?

MAP DAY 3



DAY	SECTION	DESCRIPTION	SECTION ISSUES
4	Walk 6.5km	The morning walk takes guests onto Ninety Mile Beach for a wild experience of open ocean environment and sand dunes, before tracking inland through wetlands and across bridges to get to Rotamah Island, a location so significant for birdwatching that Birds Australia set up its Rotamah Island Bird Observatory at the homestead there. Morning tea is enjoyed at the Homestead while (NEW) being introduced to the First Nation/ Gunaikurnai history and cultural significance of the island and its wildlife.	- Homestead is in disrepair. Question of lease to Birds Australia. - Question of how to establish First Nation/ Gunaikurnai interpretation (what, by whom and where on Rotamah). - Potential of high winds / foul weather – contingency? Walk along more protected Ocean Grange Track? Also vehicle extraction.
	Boat Transfer	From Rotamah Island, guests are transported via boat transfer north to Sperm Whale Head and Point Wilson.	Boat operator? Viability?
	Walk 4.5km	Docking at the public jetty at Point Wilson, guests take on a short inland loop walk of approx. 4km, exploring the hinterland environs of Sperm Whale Head. Lunch to be taken at Pt Wilson.	- No issues. - Opportunity for furthering First Nation/Gunaikurnai interpretation?
	[ALT: Paddle] 7.5km	<i>Alternative option to paddle (rather than walk) from Ocean Grange, exploring the small islands en route before crossing to Sperm Whale Head and Point Wilson. Paddlers can choose to go via Rotamah Island and the homestead for morning tea.</i>	<i>Foul weather contingency?</i>
	Boat Transfer	From Point Wilson, guests are transported by boat transfer, back along the northern shore of Sperm Whale Head - with potential for a wild swim stop at Sperm Whale Head Swimming Sport or Cherry Beach – all the way to Loch Sport and the journey's end. 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.	- Boat operator? Viability? - If wild swim - possible if on boat transfer ? - Will Seacombe based Spa and Wellness Resort be built? When? What is offering.

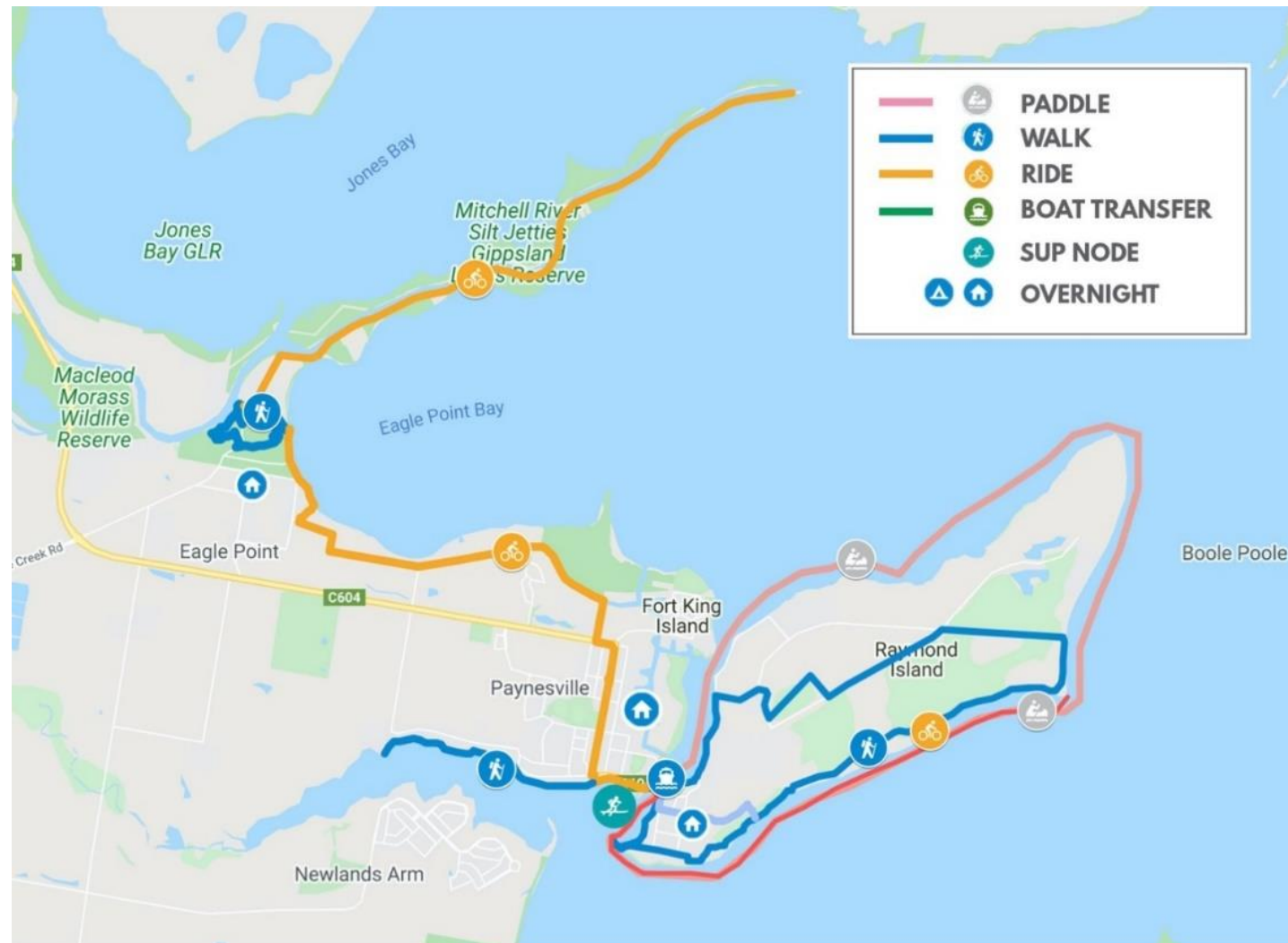
MAP DAY 4



GIPPSLAND AQUATIC TRAIL – TRAIL #2

STARTS	Paynesville <i>or alternative</i>		
FINISHES	Paynesville <i>or alternative</i>		
DAYS / NIGHTS	3/2		
RATING	Easy		
SECTIONS OVERVIEW	• Walk: 3 • Paddle: 1 • Boat transfer: 1 • Bus transfer: 0 • Alternatives: 1 x ride (potential – Raymond Island) • Optional add-ons: Stand Up Paddle Board • Other interactions: Cultural / First Nations		
SECTIONS ITINERARY (section can be completed in any order)	• DAY 1: Ride > Walk > Ride • DAY 2: Paddle > Walk • DAY 3: Walk (or ride)		
SECTIONS DISTANCES	DAY	ACTIVITY	DISTANCE
	1. Paynesville – Eagle Point – Silt Jetties – Eagle Point - Paynesville	Ride Walk Ride 12km + 7km	7km 3km 19km
	2. Paynesville – Raymond Island – Paynesville – Sunset Cove – Paynesville	Paddle Walk	15km loop <i>alt 12km out and back</i> 5km
	3. Paynesville – Raymond Island – Paynesville	Boat transfer Walk or Ride	12km
ACCOMMODATION	• Paynesville, Eagle Point, Raymond Island • hotel, motel, resort, apartments and houses options via accommodation listings, AirBnB, Stayz etc, + caravan parks.		
HIGHLIGHTS	• Easy access / town based • Easy effort • Birdlife • Good food and dining interactions • Koalas / Raymond Island		

MAP



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ALL TRAILS

OVERVIEW:

This pick-n-mix introductory trail connects the townships of Eagle Point and Paynesville with Raymond Island and Sunset Cove, keeping activities accessible, relatively short and easy to engage in for all visitors.

The activities prescribed can be undertaken in any order.

A suggested itinerary begins in Paynesville, as the largest township with the most services on offer.

The initial ride route passes through the centre of Paynesville, to greet the Point Fullarton Wetlands, before tracking east to the small village of Eagle Point.

Here, visitors can leave their bikes at the Eagle Point Caravan Park, and enjoy a short loop walk through the Eagle Point Flora and Fauna Reserve and across to the Eagle Point Bluff Lookout, overlooking the Mitchell River, the silt jetties and inland Gippsland mountain ranges.

Returning to collect bikes, visitors can elect to ride out (and back – 12km) along the Mitchell River Silt Jetties - the second longest in the world after the Mississippi – before riding back to Paynesville.

Day two focuses on water activities with the choice between a full circumnavigation of Raymond Island or an out and back exploratory paddle (route pending conditions, the southern shore in good paddling weather out to Point Scott and back).

Late afternoon on Day Two is a perfect time to stretch the legs with a 5km out and back (total) walk to Sunset Cove and beyond, exploring the northern bank of Newlands Backwater on pleasant walking trail.

The final day of activities focuses on exploring Raymond Island (and its koala population) on foot or by bike with an approx. 12km loop trail with alternative short cuts. Stand Up Paddle Boarding may be indulged post walk for a refreshing finisher off Montague Point on the island's southern tip.

SECTION BREAKDOWN

DAY	SECTION	DESCRIPTION	SECTION ISSUES / OPPORTUNITIES
1	Ride 7km	Beginning at Paynesville, visitors take a short ride north through the township before joining up with a trail bearing east skirting the Point Fularton Wetlands towards Eagle Point	• Part road based – not ideal • Fairly ‘demure’ experience • Bike hire? • Opportunity to create new trails to take off road sections?
	Walk 4km	Arriving at Eagle Point, riders can store their bikes at the Eagle Point Caravan Park, before linking into a loop trail accessing the Eagle Point Flora and Fauna Reserve, a 20 Hectare Reserve featuring rare limestone box forest of coastal grey box, blue box and Gippsland Redgum trees. Walk along its trails to discover the ephemeral lake, the bat house, a permanent waterhole and the Eagle Point Bluff lookout, with views across fields, mountain ranges, the famous Mitchell River silt jetties, rivers and lakes.	• Realistic to leave bikes at Caravan Park to take up walk? • Bike safety when walking? • If walk is hosted, bikes may be left at entrance of parklands? • Opportunity to engage with local forager, artist, researcher and photographer, Lisa Roberts for Eagle Point Flora and Fauna interpretation • First Nation/Gunaikurnai interpretation ?
	Ride 19km	Back on the bikes, a 6m ride will take you to the eastern tip of the Mitchell River Silt Jetties, the second longest in the world after those found at the end of the Mississippi River in the US. The Mitchell River Silt Jetties are naturally formed narrow banks of silt extending eastwards out into the lake. There is a part bitumen/part gravel road all the way to the end, with many favourite fishing spots along the way. The silt was deposited over millions of years when the Mitchell River slowed as it entered Lake King. The jetties are also home to a large range of native animals and birds. Reaching the end of the Silt Jetties, riders will return the way they came, riding back to Paynesville.	• Out and back not always appealing experience.
	Accommodation	Paynesville, Eagle Point, Raymond Island hotel, motel, resort, apartments and houses options via accommodation listings, AirBnB, Stayz etc, + caravan parks	Visitors can choose to stay in locations other than Paynesville (good range of options)

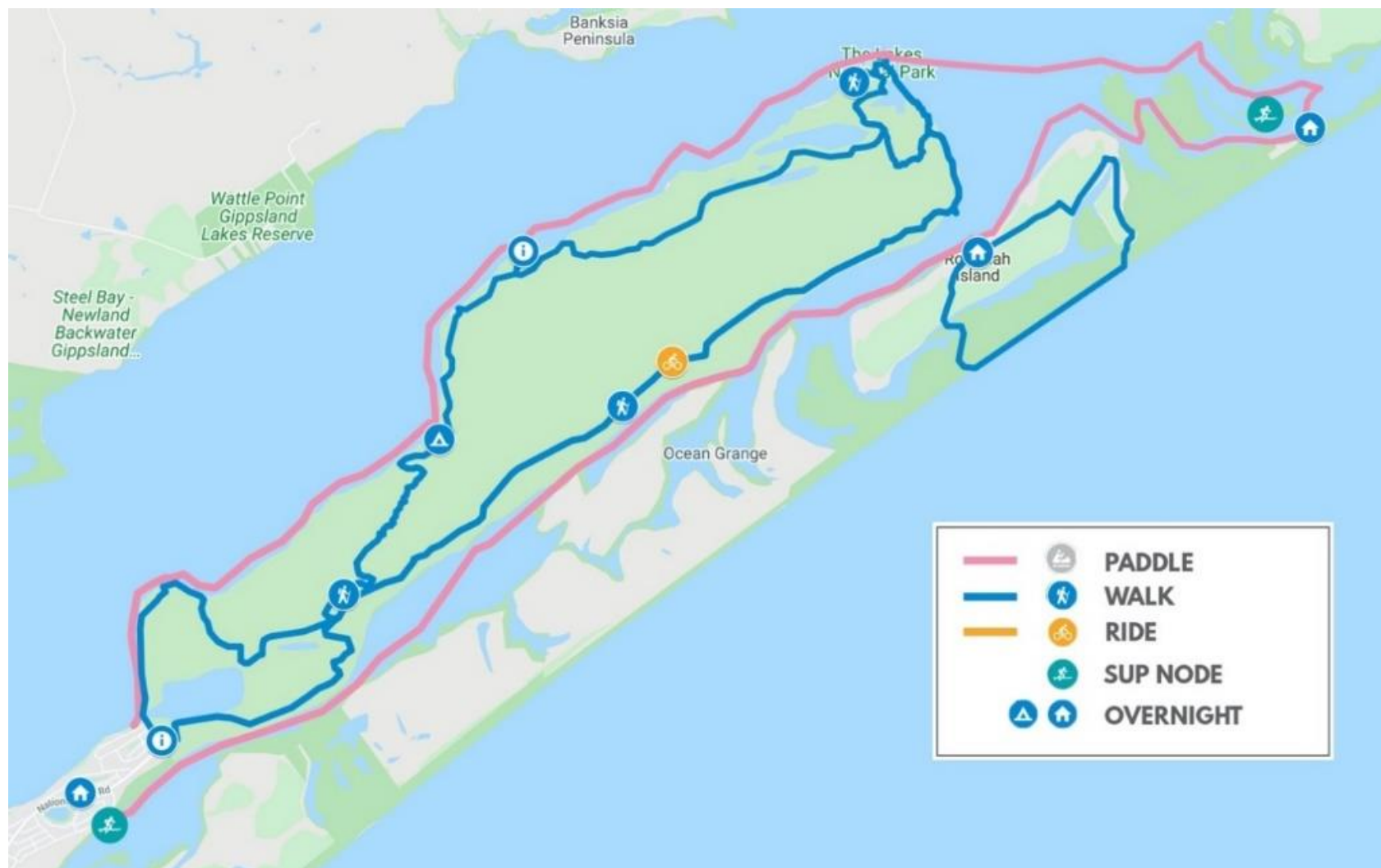
DAY	SECTION	DESCRIPTION	SECTION ISSUES & OPPORTUNITIES
2	Paddle 12-15km	Beginning at either Paynesville or across on Raymond Island (Montague Point?), paddlers take note of weather conditions and can choose to complete a full 15km circumnavigation of Raymond Island, beaching at selected spots to enjoy the shoreline beauty en route. Alternatively paddlers can choose to explore as far or nearby to the put-in point as they wish and/or conditions allow. Options include a 12km return paddle along the southern shore of Raymond Island to Point Scott or alternatively point the bow west and cross to Butler Point and Newland Backwater.	• What are the highlight beauty points of Raymond Island for paddlers? • Exposure of southern shore? • Contingency for foul weather? • Rentals? Guided? • Opportunity to explore closer into Paynesville, looping through canals for an 'urban paddle'. • Good food and dining connections in Paynesville and Raymond Island (?)
	Walk 5km	Back on dry land, and the afternoon and sunset period is idea for a 5km (2.5km out and back) walk west along the north shore of Newlands Backwater, to Sunset Cove and beyond.	• Connection of walking path from Paynesville to beginning of walking track to Sunset Cove? Can this be extended (or into private property?)
	Accommodation	As per Section 1 / Day 1	

DAY	SECTION	DESCRIPTION	SECTION ISSUES & OPPORTUNITIES
3	Boat Transfer	A quick trip across to Raymond Island from Paynesville, and it's on to the trails on foot or by bike. Explore the south west of the island and spot koalas en route. Take in a larger loop on (NEW?) trails or keep it short and sweet finishing at Montague Point for a Stand Up Paddleboard experience.	• Free transfer for pedestrian and bike travel • Bike hire – from Paynesville, Raymond or both? • Raymond Island community engagement - opinion on tourism and growing visitation? • Opportunity to engage Paynesville cafes, bakeries, retail etc. • SUP hire?
	Walk / Ride 12km		• Suitability of trails for riding and walking? Routes – existing vs new trails? • Likelihood of new trails if needed?
	SUP	Explore the shorelines Raymond Island from Montague Point	• Other SUP locations? • Rentals available?
	Accommodation	As per Section 1 / Day 1	

GIPPSLAND AQUATIC TRAIL – TRAIL #3

STARTS	Loch Sport		
FINISHES	Loch Sport		
DAYS / NIGHTS	4/3		
RATING	Easy Moderate if paddling		
SECTIONS OVERVIEW	• Walk: 2 – 4 • Paddle: 1 – 4 • Boat transfer: potentially 2 (Pt Wilson > Ocean Grange + Rotamah > Sperm Whale Head (Trapper Pt) • Bus transfer: N/A • Alternatives: options to mix and match walk / paddle. Potential for bike ride on return leg of Sperm Whale Head • Optional add-ons: Stand Up Paddle Board • Other interactions: Cultural / First Nations		
SECTIONS ITINERARY (section can be completed in any order)	• DAY 1: Loch Sport > Emu Camp • DAY 2: Emu Camp > Pt Wilson > Ocean Grange • DAY 3: Ocean Grange > Rotamah Island • DAY 4: Rotamah Island > Loch Sport		
SECTIONS DISTANCES	DAY	ACTIVITY	DISTANCE
	1. Loch Sport > Emu Camp	Paddle <i>ALT: Walk</i>	7km <i>8.5km</i>
	2. Emu Camp > Pt Wilson > Ocean Grange	Paddle 8km + 6.5km Walk <i>ALT: Walk</i> <i>ALT: Boat Transfer</i>	14.5km 4km <i>11km</i> <i>6.5km</i>
	3. Ocean Grange > Rotamah Island	Paddle Walk <i>ALT: Walk + ?</i>	5km 8km <i>6.5km + ?</i>
	4. Rotamah Island > Loch Sport	Paddle <i>ALT: Boat Transfer</i> <i>ALT: walk or ride</i>	12.6km <i>0.5km</i> <i>11km</i>
ACCOMMODATION	• Emu Camp [potential camp or establish Eco-Camp] • Ocean Grange [homestead stay or potential Eco-Camp] • Rotamah Island [refurbish Bird Observatory or potential Eco-Camp]		
HIGHLIGHTS	• Excellent Lakes landscapes • Easy-Moderate to undertake yet good sense of wild / remoteness • Birdlife • Gunaikurnai potential interpretation		

MAP



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ALL TRAILS

OVERVIEW

Trail #3 in the Gippsland Aquatic Trails Series focuses on exploring the landscapes and aquatic environs of Sperm Whale Head and Rotamah Island, two highlight features of the Gippsland Lakes.

This trail can be undertaken in various capacities linking mostly walking and paddling legs, which can be mixed according to preference and weather conditions. There is also potential to explore – pending on site survey – a ride leg (or new trail) linking Loch Sport and Pt Wilson.

The route is set up for a 4-day excursion, although could be completed in more or less pending visitor preferences.

Visitors begin in the small village of Loch Sport, choosing to walk or paddle their way to Emu Camp, on the northern shore of Sperm Whale Head. This is the overnight in either tented camps or a (NEW) Eco-Camp, with an evening swim 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. Docking or arriving at Pt Wilson, visitors then take on a short (4km) loop walk around the Pt Wilson environs, before paddling [or pre-arranged boat transfer for non-paddlers] across to Ocean Grange for a comfy night's rest at either a resort homestead or an Eco-Camp. Visitors can elect to enjoy some evening Stand Up Paddle Boarding exploring the nearby Crescent Island to the north of Ocean Grange, or take a stroll along the ocean-side Ninety Mile Beach.

In the morning, choose to paddle to Rotamah Island and Bird Australia's Bird Observatory, followed by a short loop walk across to Ninety Mile Beach. Alternatively, elect to walk to the Bird Observatory from Ocean Grange via Ninety Mile Beach.

A new Eco-Camp or potential refurbishment of the Bird Observatory will gift a pleasant night's sleep.

It is proposed a form of cultural interaction and interpretation be planned for Rotamah Island afternoon, with First Nation/ Gunaikurnai involvement.

On the final day, guests paddle south west along protected waterways past remote lakeside beaches en route to the trail's terminus at Loch Sport.

SECTION BREAKDOWN

DAY	SECTION	DESCRIPTION	SECTION ISSUES / OPPORTUNITIES
1	Paddle 7km [Walk 8.5km]	Beginning in the small lakeside village of Loch Sport, guests receive a paddle safety briefing before setting off from the jetty on the northern side of town, closely following the shoreline of what becomes the northern shore of Sperm Whale Head. Rounding Pelican Headland and past Trouser Bight with views across Lake Victoria, kayakers reach Boobialla Point before berthing at Emu Bight where camp is set just into the hinterland. Potentially pre-set camp, self-sufficient or a NEW Eco-camp for consideration. <i>[As an alternative to paddling, walkers can take an 8.5km trail through the woodland to reach Emu Camp]</i>	• General consideration of trail network on Sperm Whale Head and how they link together, including potential ability to ride return trail (see later) • Kayak operator? Hire / guide? • Potential / feasibility for kayak pick-up if client not paddling full loop?
	ACCOMMODATION	EMU CAMP • Standard camp at Emu Camp (existing) • Set (supported) camp at Emu Camp (existing) • Eco-camp potential to be developed?	• Accommodation at Emu Camp – potential for Eco-Camp? • If camping only – access for pre-set supported camping or self-sufficient only?

DAY	SECTION	DESCRIPTION	SECTION ISSUES & OPPORTUNITIES
2	Paddle 8km <i>[Walk 8.5km]</i>	Leaving Emu 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. <i>[Alternatively, a walking trail skirts the shoreline, also visiting the wild swimming spots, before diverting inland, through banksia swamp and around Lake Killarney, to Point Wilson]</i>	• Quality of trail experience? • Exposure factor for paddle?
	Walk 4km	Alighting at Pt Wilson on the north eastern tip of Sperm Whale Head, guests can explore the hinterland via a 4km trail looping around Lake Killarney.	• Quality of trail experience? • Exposure factor for paddle?
	Paddle 6.5km <i>[ALT: Boat Transfer]</i>	With lunch enjoyed at a Point Wilson picnic spot, visitors then set off on kayak to paddle across Lake Reeve to Rotten Island. Working their way either around the northern shores of Rotten and Waddy Islands eventually docking Ocean Grange for a night's comfortable accommodation. <i>[ALT: for walk-only visitors, a boat transfer will deliver from Pt Wilson to Ocean Grange.]</i> Time permitting, some may choose to enjoy some Stand Up Paddle Boarding in the afternoon/evening, exploring Crescent Island and its shallow water inlets to the north of Ocean Grange.	• Feasibility of boat transfer given short distance? Ex-Loch Sport? • Foul weather contingency for paddle leg? • SUP availability at Ocean Grange
	Accommodation	Opportunity to leverage Ocean Grange By The Beach as accommodation. Currently for sale. http://oceangrangebythebeach.com.au Alternative option to establish Eco-cabins nearby Ocean Grange, site TBC	• Issue of access to Ocean Grange By The Beach – currently for sale (opportunity?). How to retain for ongoing accommodation access if not control over site? • Site selection and permits, enviro and cultural considerations should Eco-Cabins be required? Who will invest? Who will manage?

DAY	SECTION	DESCRIPTION	SECTION ISSUES & OPPORTUNITIES
3	Paddle 5km <i>[ALT: walk 6km]</i>	A shorter day of activities where guests may like to take a morning SUP exploration around Crescent Island to the north of Ocean Grange before hopping back in the kayak to paddle the short distance via narrow channels of Barton and Rotten Islands to arrive at Rotamah Island, famous for its birdlife with more than 200 species. {ALT: walkers can enjoy a wild beach stroll south along Ninety Mile Beach before heading over the dunes, through wetlands and on to Rotamah Island}.	- Paddle contingency covered by walk route - Opportunity to re-develop homesteads / Bird Observatory into accommodation or cultural interpretation centre - Opportunity to establish First Nation/Gunaikurnai cultural immersion experience
	Walk 8km	From the jetty at Rotamah's north shore, a loop walk of approx. 8km explores the island's landscapes including Little Rotamah Island and the dunes and wild beachscapes of Ninety Mile Beach.	Quality of walking experience?
	Accommodation	No current accommodation.	Requirement to develop accommodation: campsite, Eco-Camp or use homestead buildings as base to redevelop lodge accommodation.
DAY	SECTION	DESCRIPTION	SECTION ISSUES & OPPORTUNITIES
4	Paddle 12.6km <i>[ALT: boat transfer + walk or ride 11km]</i>	The final leg of the Sperm Whale Head circumnavigation journeys south along the narrow channels of Lake Reeve, the dunes to the south keeping padders protected from Bass Strait. Explore a myriad of inlets and beaches en route, before docking on the rear side of Loch Sport. <i>[ALT: boat transfer from Jetty Observatory pier on Rotamah Island to Trapper Point on Sperm Whale Head, then link up with the undulating tracks heading south back to Loch Sport, stopping at Lake Reeve Lookout Tower on the way.]</i>	- For potential bike leg: logistics of bike drop off, operator - Suitability of track for cycling (would take different route into Loch Sport than the walking route).
	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?

GIPPSLAND AQUATIC TRAIL – TRAIL #4

STARTS	Lakes Entrance		
FINISHES	Lakes Entrance		
DAYS / NIGHTS	4/3 +		
RATING	Moderate		
SECTIONS OVERVIEW	• Ride: 1 (+ potential MTB) • Paddle: 2 • Gunaikurnai Cultural Experience: 1 • Walk: 1 • Optional add-ons: Stand Up Paddle Board		
SECTIONS ITINERARY	• DAY 1: Lakes Entrance > Nowa Nowa • DAY 2: Nowa Nowa > Trident Arm Camp • DAY 3: Trident Arm Camp > Glasshouse Camp or Lake Tyers Beach • DAY 4: Glasshouse Camp or Lake Tyers Beach > Lakes Entrance		
SECTIONS DISTANCES	DAY	ACTIVITY	DISTANCE
	1. Lakes Entrance > Nowa Nowa	Ride	30km (easy riding)
	2. Nowa Nowa > Trident Arm Camp	Paddle	17km
	<i>ALT: potential to camp at earlier campsite (i.e. Ironbark)</i>		<i>ALT: 13km</i>
	3. Trident Arm Camp > Gunaikurnai Cultural Experience Bung Yarnda/Lake Tyers Mission > Glasshouse Camp or Lake Tyers Beach	Paddle	6-8km
			<i>ALT: 12km</i>
	4. Glasshouse Camp or Lake Tyers Beach > Lakes Entrance	Paddle (if at Glasshouse / no paddle if already overnigheted at Lake Tyers)	2km
		Walk	10km
ACCOMMODATION	• Nowa Nowa – commercial options including AirBnB, tavern, caravan park. • Trident Arm Creek – campsite. Option for Eco-Camp? • Glasshouse Camp – campsite. Option for Eco-Camp? Or Lake Tyers Beach - Caravan Park and motel. • *is there / could there be any accommodation at Lake Tyers Aboriginal Trust?		
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 or accommodation based		

MAP



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ALL TRAILS

OVERVIEW:

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 along with significant Gunaikurnai cultural experience nodes at Forestec and at Bung Yarnda/Lake Tyers Mission.

The route begins with a welcoming experience at the Gunaikurnai Forestec Interpretation Centre, just outside of Lakes Entrance, with a First Nations interpretive insight into the landscapes and cultures soon to be experienced.

Riders then choose from either technical singletrack or more comfortable but all off road trails through Colquhoun Forest to access the Gippsland Discovery Trail.

The 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.

Energetic paddlers seeking to shorten the trip by one day can make the distance all the way to Glasshouse (camp) or Lake Tyers Beach for the next night's accommodation. However, most will choose to break the paddle into two leisurely parts with a selection of two overnight camps on the eastern riverbank (Ironbox or Trident).

Day three and a short morning paddle welcomes visitors to a cultural experience with the Gunaikurnai community at Bung Yarnda – also known as Lake Tyers Mission and the Lake Tyers Aboriginal Corporation.

Having gained a rich intimate insight into the history of the Bung Yarnda/Lake Tyers Mission and Gunaikurnai culture, guests paddle on to Glasshouse or Lake Tyers Beach for the next layover.

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.

SECTION BREAKDOWN

DAY	SECTION	DESCRIPTION	SECTION ISSUES / OPPORTUNITIES
1	Ride 30km	Leaving from the Gunaikurnai Forestec Interpretation Centre, riders cycle east, along Uncles Rd [alternatively along Limestone Box Forest Track], before joining the well-crafted, wide and non-technical Gippsland Lakes Discovery Trail, once known as the Mississippi Trail. This rail trail connects into Colquhoun MTB Trails at several points, meaning mountain bikers seeking an alternative singletrack experience from Forestec can opt for Tin Shed Track or Lennies Track as access routes to the Gippsland Discovery trail. From here the rail trail 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. Mountain bikers can choose to divert off the main route, west linking into the Colquhoun MTB Park trails for some singletrack fun, before looping back to re-join the Discovery Trail. 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 or more singletrack thrills found in the extensive MTB Park.	• Leverages cultural beginning to journey at Gunaikurnai Forestec / good start node for interpretation, safety facilitation and data collation • Access to Colquhoun MTB Park excellent for MTB riders, inclusive loop to access Discovery trail • Alternative dirt road / trail routes available for non-technical / easy riding access to Discovery Trail • Most riding is 'easy', especially once on East Gippsland Rail Trail (flat) • Potential to leverage Nowa Nowa's tourism infrastructure and offerings, accommodation, artist galleries etc. • Potential to establish SUP rental for creek paddling downstream / Nowa Nowa Gorge upstream • Leverage Sculpture Walk • Leverage Nowa Nowa MTB Trails • All trails existing (except for parts of 8km out of Lakes Entrance) NOTE: <i>Lake Tyers State Park Camping and Access Strategy</i> consultations are live - this may have relevancy.
	Accommodation	Nowa Nowa • commercial options including AirBnB, tavern, caravan park	

DAY	SECTION	DESCRIPTION	SECTION ISSUES & OPPORTUNITIES
2	Paddle 17km	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 Trident Arm for a night's camp (facilities). Alternatively, there is an earlier campsite at Ironbark (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 Glasshouse or Lake Tyers Beach. Or if 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	Trident Arm – camp (existing) Ironbark (existing)	Any potential for an Eco-Camp at Reedy Arm Number 2 (or Reedy Arm Number 1) / Ironbark?

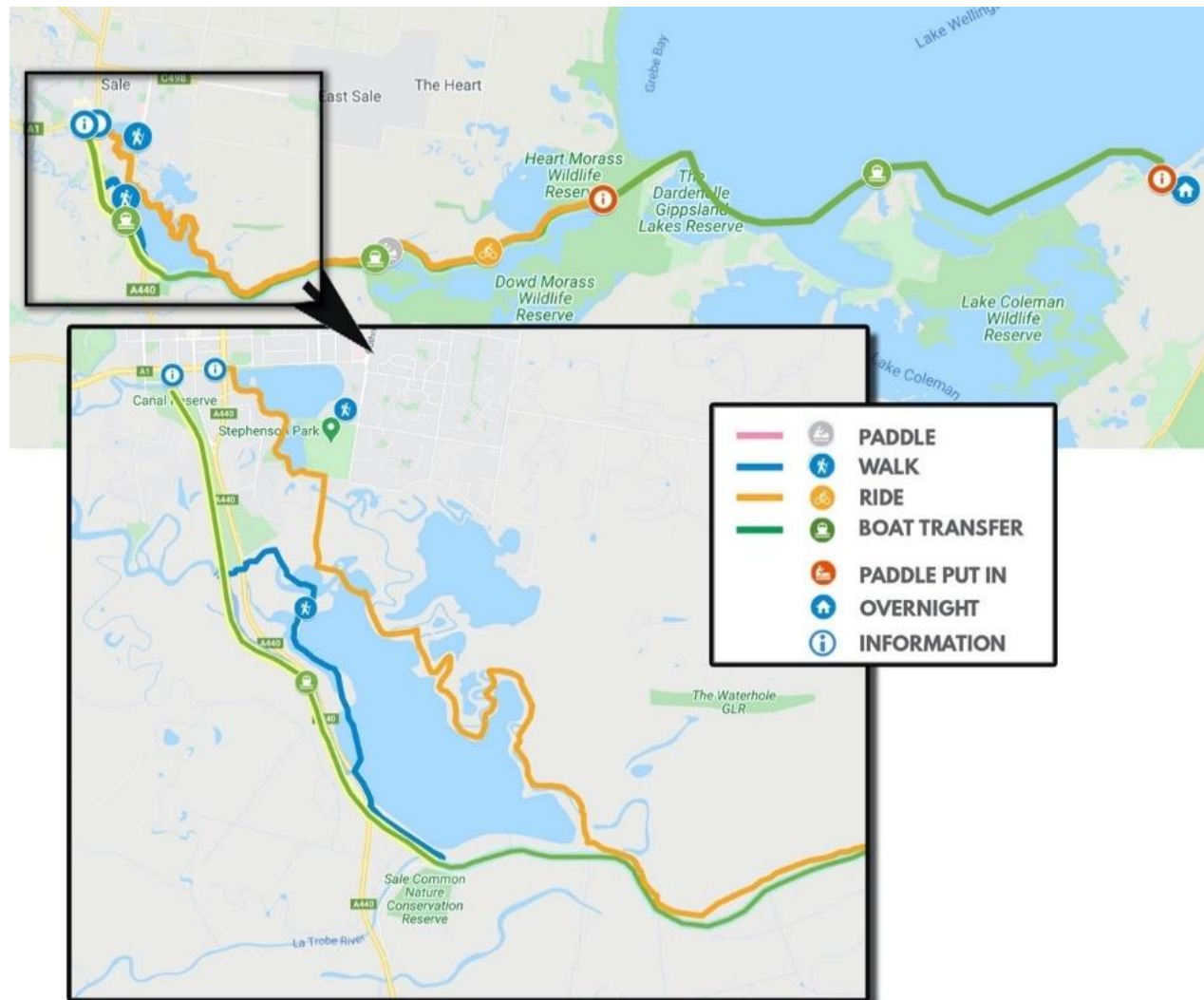
DAY	SECTION	DESCRIPTION	SECTION ISSUES & OPPORTUNITIES
3	Paddle 4km	Paddlers move on from the first overnight camp, paddling further downstream and across the Lake to visit Bung Yarnda – also known as Lake Tyers Mission. <i>ALT: those who have stayed over at Glasshouse or Lake Tyers can skip cultural experience to shorten tour by one day – move straight to final walk leg, see Day4 – or alternatively paddle back across to Bung Yarnda for cultural experience, with an afternoon of SUP around Mud Islands and second night stay at Lake Tyers Beach.</i>	Feasibility of developing experiences, interpretation, integrations with Bung Yarnda / Lake Tyers Mission community?
	First Nations Experience	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?
	Paddle 4km-6km	Taking off from Bung Yarnda / Lake Tyers, paddlers make the final paddle across past Mud Island to either Glasshouse Camp or Lake Tyers Beach township. Option of an afternoon SUP experience around nearby Mud Islands or further paddle to link into other Lake Tyers accessible bush walks up western arms of Lake Tyers.	- SUP experience around Mud Islands from Lake Tyers Beach - Add on kayak to access short bushwalks
	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?	

DAY	SECTION	DESCRIPTION	SECTION ISSUES & OPPORTUNITIES
4	Walk 10km	For those staying at Glasshouse Camp or Bung Yarnda / Lake Tyers, a short morning paddle deposits them at Lake Tyers Beach township for morning tea. For all visitors it is then a 10km walk tracing 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 - can pick up trails to stay high but requires forging trail down to shores of Lake Bunga at some point (needs survey)? • Is Lake Bunga spit always closed / walkable?

GIPPSLAND AQUATIC TRAIL – TRAIL #5

STARTS	Sale		
FINISHES	Sale		
DAYS / NIGHTS	2/1 (could extend to 3/2)		
RATING	Easy		
SECTIONS OVERVIEW	• Paddle: 1 • Boat Transfer: 1-2 • Walk: 1 • Gunaikurnai Cultural Experience: 1 • Ride: 1		
SECTIONS ITINERARY	• DAY 1: Sale > Heart Morass Wildlife > Lake Wellington > Nunduck Spa Retreat • DAY 2: Nunduck 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 > Swing Bridge	Walk <i>*point to point short walk requires boat drop off earlier at Thompson River confluence, pick up at Swing Bridge / Latrobe Wharf</i>	4km (point to point) or 7km (loop)
	3. Swing Bridge > Heart Morass Wildlife Reserve	Boat transfer or kayak	12.5km
	4. Heart Morass Wildlife Reserve > Lake Wellington > Nunduck Spa Retreat	Boat transfer	17km
	Nunduck Spa Retreat > Heart Morass Wildlife Reserve	Boat transfer	17km
	Heart Morass Wildlife Reserve > Sale	Ride	19km
ACCOMMODATION	• Sale – commercial options including hotels, motels, AirBnB, caravan park. • Nunduck Spa Retreat		
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 • Nunduck Spa Retreat health and wellness treatments • Heritage/ art / culture nodes in Sale (i.e. Art Gallery)		

MAP



<https://www.google.com/maps/d/u/1/edit?mid=1kPrF7sHx1S5bWL2iBse3JkyLUJ4fUQsf&usp=sharing>

ALL TRAILS

OVERVIEW

Departing from the historic Port of Sale, this journey 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 begins 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 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 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 a 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 landing, where kayaks and/or the boat docks. Here, paddling guests return to boat transfer to be whisked across Lake Wellington to the new Nunduck Spa Retreat, Seacombe, for a night of luxury treatment.

A morning of relaxation is 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.

APPENDIX B CASE STUDIES

MURRAY RIVER ADVENTURE TRAIL25, VIC/NSW

One notable trail that specifically includes paddling, riding and walking options within its overall positioning, is the Murray River Adventure Trail, located on the Victorian-NSW border.

A \$25 million project currently in early stages of development, it is described as “a multi-sport adventure trail extending along the length of the Murray River within the Murray tourism region in Victoria and NSW, using land and water to incorporate walking, cycling, kayaking/canoeing and other forms of water transport.”

The trail extends from Lake Hume, near Albury Wodonga in the east to Mildura, Wentworth in the West. The Trail traverses secluded River Red Gum forests and major settlements along the length of the Murray River and provides opportunities for visitors to experience the Murray River in its natural setting, allowing immersion in the environment through active recreation.

The land-based trail (for cyclists and walkers) is around 1,040 kilometres, while the water-based trail (for kayakers and other craft) is 1,390 kilometres. Trail users can enjoy sections or the entire length of the trail.



There is no available data on trail usage or economic returns as yet, as the trail remains in early stages of development, however a feasibility report suggested that the trail will:

- attract investment in both public and private infrastructure
- create employment opportunities in the initial construction and through the attraction and development of new tourism products associated with the trail
- attract and extend the length of stay of 110,000 visitors to the Murray Region annually
- be used 200,000 times per year by local residents
- generate annual output of \$12.8 million and 71 jobs per annum in the Murray Region economy
- deliver a Net Present Value (NPV) of \$34 million and a Benefit Cost Ratio (BCR) of 2.3.

The trail will be developed in three stages over a 10-year period with first stage being now being developed in parts.

Economic modelling and feasibility outcomes for the Murray River Adventure Trail were based on single-use trails where the user was deemed of a similar profile. The High Country Rail trail (Vic), Bibbulmun and Mundabiddi Track were some used as baselines along with other long distance tracks in NZ and overseas. ***An updated business case is due in October-November 2020.***

²⁵ <https://www.murrayregionaltourism.com.au/murray-river-adventure-trail/>

WHITSUNDAY NGARO SEA TRAIL, QLD

One of Queensland's so-called Great Walks, the Ngaro Sea Trail is notable for its inclusion of sea-based paddling trails, land-based walking trails and strong First Nation/Ngaro cultural elements. Indeed, the 'trail route' has existed for as long as the Ngaro First Nation has inhabited the region, however the Ngaro Sea Trail as a defined tourism-focused concept was inaugurated in 2010.

The Whitsunday Ngaro Sea Trail is an extensive mostly self-guided trail comprising five walks and associated seaways located in the Whitsunday Islands, Queensland, taking in South Molle, Whitsunday and Hook islands. The Trail features walks ranging from as little as 170m one way to 6km offering significant natural attractions and access to culturally significant sites. The Ngaro Cultural Site on Hook Island is a significant First Nation cultural interaction, featuring a rock shelter containing art motifs and extensive cultural deposits of the Ngaro people. The site also includes a boardwalk, viewing area and interpretive displays.

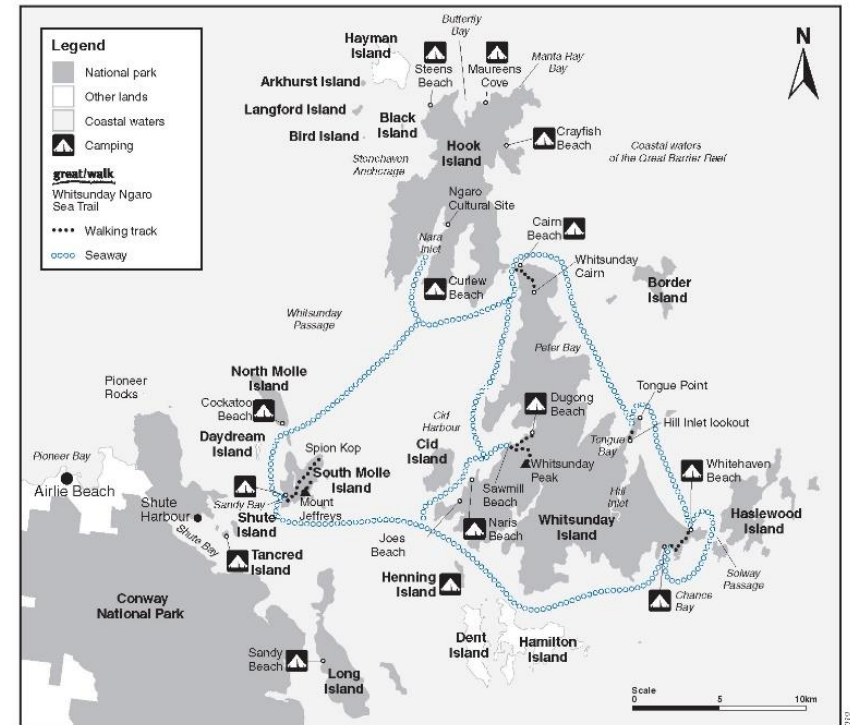
The seaways are generally calm and can be accessed by kayak or small boat. Visitors engage in the trail self-supported via sea kayak, small boat or bareback sail charter or can engage individual tour operators for bespoke experience (there are no set date tours following the trail). Camping areas are provided along the trail, accessible by both walkers and paddlers. The trail as a multi-activity whole can be done in around five days or in parts.

There are other First Nation touchstones including hosted cultural activities and an underwater art installation attraction.

There are no recorded visitation statistics for the Ngaro Sea Trail, however it remains a highly promoted element of Queensland's Great Walks package and is highlighted as a must do on Whitsunday Tourism's online information.

Whitsunday Ngaro Sea Trail map

One of Queensland's **great/walk**



Trip planner

Distances provided are approximate and apply if travelling the Whitsunday Ngaro Sea Trail in an anti-clockwise direction.

No allowance is made for tides, bad weather or possible drift.

Camping permits required. Book online at qld.gov.au/Camping

From	To	Distance (km)	Distance (mi)
Shute Harbour	Shute Island	5	3.1
Shute Island	Tancred Island	8	5.0
Tancred Island	Daydream Island	12	7.5
Daydream Island	North Molle Island	15	9.3
North Molle Island	South Molle Island	18	11.2
South Molle Island	Shute Island	22	13.7
Shute Island	Shute Harbour	25	15.5
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Daydream Island	North Molle Island	15	9.3
North Molle Island	South Molle Island	18	11.2
South Molle Island	Shute Island	22	13.7
Shute Island	Shute Harbour	25	15.5
Shute Harbour	Shute Island	5	3.1
Shute Island	Tancred Island	8	5.0
Tancred Island	Daydream Island	12	7.5
Daydream Island	North Molle Island	15	9.3
North Molle Island	South Molle Island	18	11.2
South Molle Island	Shute Island	22	13.7
Shute Island	Shute Harbour	25	15.5
Shute Harbour	Shute Island	5	3.1
Shute Island	Tancred Island	8	5.0
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Tancred Island	Daydream Island	12	7.5

CLARENCE VALLEY CANOE AND KAYAK TRAIL, NSW

Clarence Valley Canoe and Kayak trail located in northern NSW includes eight sections.

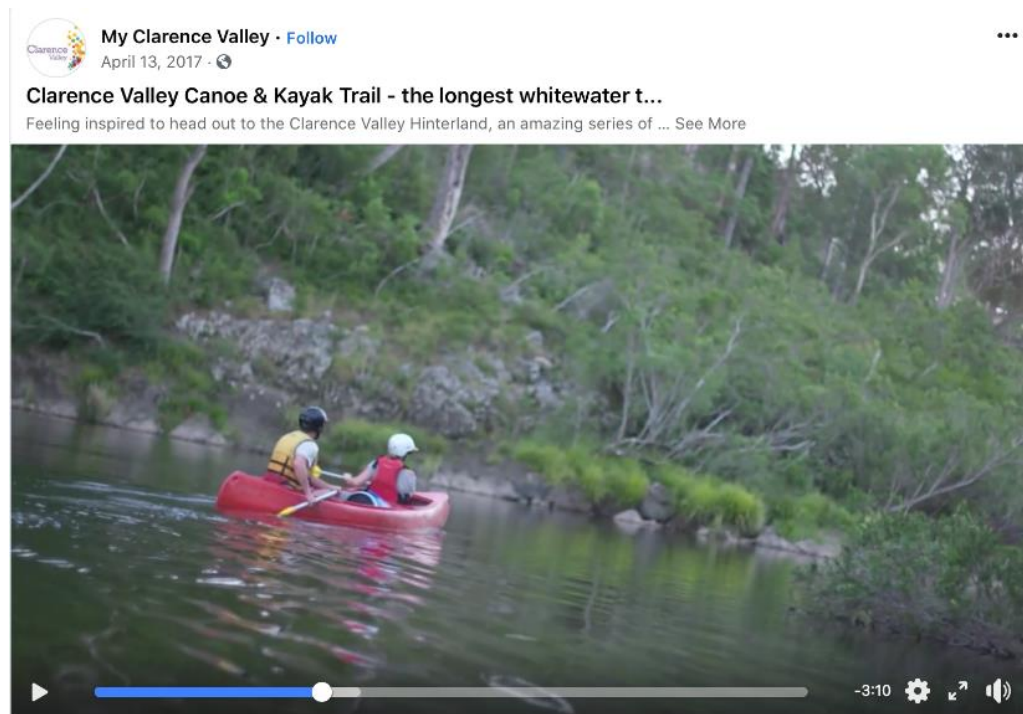
Launched in 2017, it begins at the junction of the Nymboida and Little Nymboida rivers and finishes 195km later at Copmanhurst on the Clarence River.

Multiple entry points, numerous camping site and a variety of sections with different paddling profiles and difficulty (from more difficult rapids upstream to flatwater paddling suitable for beginners downstream) offer a range of trip options.

The trail was an initiative of NSW Department of Industry (Lands) and Clarence Valley Council, who identified the creation of a river based tourism asset part of its Clarence River Way Masterplan 2009. The plan identified 'Experience Seekers' as the core target market, along with servicing the local and regional recreational user.

Development issues included a lack of identifiable access points and put-in facilities along with private landholder considerations for significant sections of the river route. Council worked with landholders and parks and waterways management to design an experience that facilitated paddling along the river, provided high quality self-guide information and encouraged local businesses to activate around the riverway experience.

The Clarence Valley Canoe and Kayak most recently featured on *We Are Explorers*²⁶, a micro-adventure community portal, with the production of an editorial video showcasing the trail (link embedded in image above).



²⁶ <https://weareexplorers.co/canoeing-clarence-river-essentials/>

NINGALOO SEA KAYAK TRAIL (PROPOSED), WA

The Ningaloo Coast World Heritage Area is a world-class sea kayaking destination offering shallow lagoons with extraordinary marine life sheltered behind one of the world's largest fringing reefs.

In 2005 the Department of Biodiversity, Conservation and Attractions (DBCA – responsible for on ground management of the Ningaloo Coast) commenced planning for a long distance sea kayaking trail in Ningaloo Marine Park. Further planning resulted in an internal report for Department of Parks and Wildlife, Overnight Sea Kayaking Trail for the Ningaloo Coast World Heritage Area – Yardi Creek to Tantabiddi.

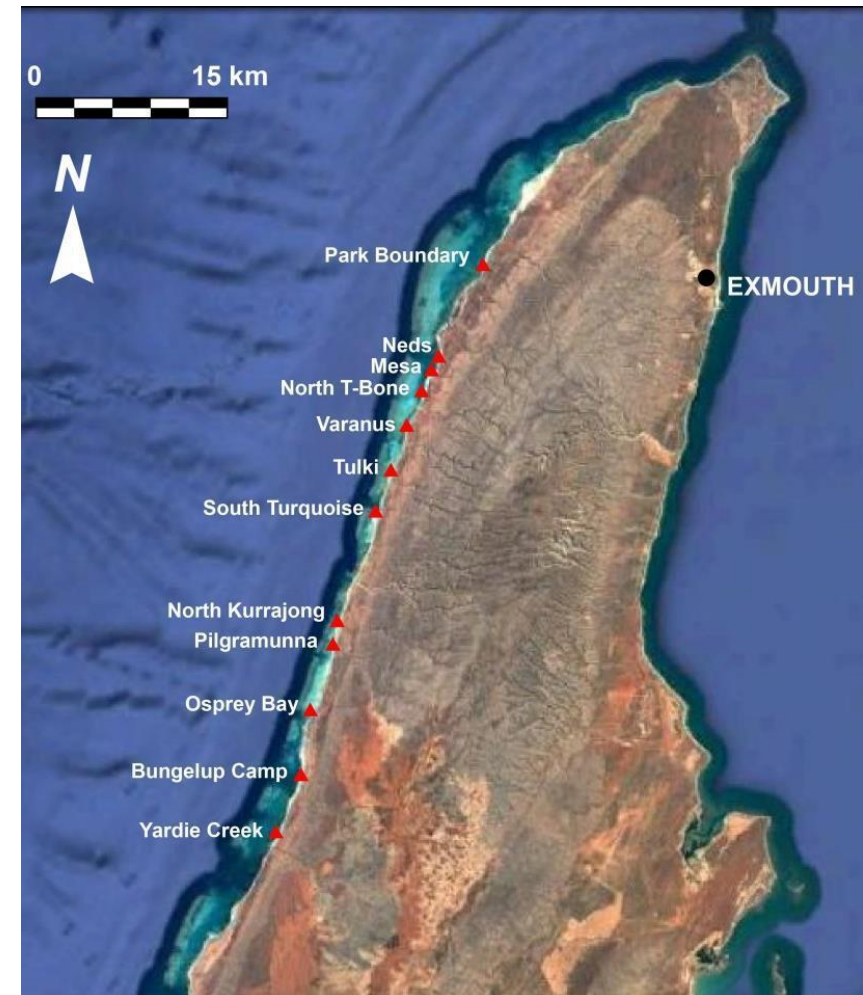
In 2018, Ningaloo Trails Master Plan (Shire of Exmouth) (TRC Tourism) supported the creation of a multi-day sea kayaking experience reporting that “The sea kayak trail provides community benefit and opportunity primarily by providing new, unique and sustainable visitor experiences within the internationally recognised Ningaloo Coast World Heritage Area. The trail will provide increased opportunity for private sector involvement through commercial tour operators and equipment hire. Licensed tour operators strongly support this initiative and anticipate their business will grow with the sea kayak trail development.”

The purpose of the sea kayak trail will be to provide an experience and challenge for user groups who appreciate the sea and for greater management of tourism activities within the park specifically the increasing numbers of recreational sea kayakers and commercial sea kayak operators.

The sea kayaking experience would build on existing day use kayak trail experiences by providing 12 well positioned camping sites on the shoreline of the lagoons for 45 kilometres inside the fringing reef. The trail provides a kayak camping experience for all level of sea kayakers from beginner to experience. The distance between the campsites reflects the skill levels and abilities of the targeted users, being for 5 km to 12 km with a total length of the trail being 45 km.

Being totally within the Ningaloo Coast World Heritage Area the sea kayaking trail provides opportunity to increase visitor appreciation and protection of marine park values by exploring and learning about the Ningaloo Coast World Heritage Area.

The multi-day sea kayaking trail has been developed in a manner that integrates with other Exmouth active experiences such as snorkelling and camping. There are also opportunities to integrate the trail with other new and emerging experiences in the area including the Ningaloo Sculpture Trail.



TE ARA MOANA SEA KAYAK TRAIL, NZ

Te Ara Moana – ‘the sea-going pathway’ - is a self-guided five-day sea kayak tour linking numerous regional parks near Auckland, NZ. Paddlers encounter a myriad of natural landscapes, wildlife and historical and cultural aspects linked to the environment and place.

The route snakes 51km along Auckland’s south-eastern coastline between Ōmana Regional Park and Waharau Regional Park , with stopovers at five regional parks with overnight camping grounds.

Paddle legs are 8-14km in distance, the route noted as achievable for novices and for sit-on-top style craft, making it an appealing option for a broad paddling market. Experienced paddlers often complete the journey in a shorter timeframe of 2-3 days, paddling up to 25km with prevailing weather. The route is sheltered from Auckland's predominant south-westerly winds and whilst it feels distinctively remote on water, paddlers are in fact never too distant from road access and civilisation. Visitors can complete shorter legs of the trail with vehicle access at most put-ins.

Prior to opening the kayak trail in 2013, Auckland Council upgraded pay-per-use campsites (\$6-\$13/person), including small catering huts, some with cooking facilities, and one with a hot shower. Several of the campsites are accessible only by water.

Te Ara Moana is one of many sea routes used by early Māori to transport goods and food in their waka between settlements. The iwi of Tāmaki Makaurau still maintain strong ties with the Hauraki Gulf, Tīkapa Moana / Firth of Thames and Te Ara Moana.



CLARENCE KAYAK TRAIL, TAS

Launched in 2018, the Clarence Kayak Trail is a 'first' for Tasmania, in terms of defining and facilitating single and multiday paddling experiences in and around the harbour, river and seaboard environments of the Derwent, near Hobart. It explores more than 191km of coastline, the trail divided into nine coastal sections from Risdon through to South Arm. Each trail sector includes information about the estimated distance and skill level required, what to see along the way, launch points, hazards and warnings, and facilities to access off the trail.

The development of a kayak trail was an initiative of the City of Clarence, Mayor Alderman Doug Chipman, stating that "it was the obvious choice to enhance the diverse range of recreational activities we offer and showcase a different way to see our city. Kayaking is a popular activity on the Derwent and around the coast. In Clarence we have estuaries, salt marshes, tidal flats, rocky headlands, urban, coastal and protected areas for people to explore.

"Not only do we have more than 300km of tracks for walkers, cyclists, mountain bikers, horse riders, but we also have a trail for kayakers to paddle and explore our beautiful waterways and take in the views of the city, Mt Wellington, Bruny Island and the Tasman Peninsula."

The kayak trail was created following extensive consultation with kayak groups who identified the routes and the level of difficulty required. It links in with other features and land-based trails in Clarence.



Appendix C 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.²⁷

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.²⁸ An overview of the types of eco-accommodation is provided in Table below.

²⁷ <https://www.nielsen.com/au/en/insights/article/2019/eco-tourism-is-not-just-for-greenies/>

²⁸ 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



SOURCE: 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>

