



Royal Coast Track Strategic Framework

For stakeholder comment by July 6

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YOUR COMMENTS

We would value your input on this document.

**Please provide any comments or feedback by July 6
to sophie@trctourism.com**

1 BACKGROUND

1.1 Introduction

Established in 1879, Sydney's National Heritage-listed Royal National Park is the oldest national park in Australia and the world's second-oldest national park.

The Royal Coast Track has been an established track for many years attracting visitors from the local area and beyond on day and overnight walks. The Track extends from Bundeena to Otford within Royal National Park. The track broadly follows the coast, with some sections traversing coastal heath and hinterland forest.

Located only 32km away from the largest city in Australia, within an hour's drive from both the Sydney CBD and Wollongong, and 20 minutes from Sydney Airport, the Track is easily accessible by car, train and ferry. It can be walked in one long day or with an overnight stay but there is a significantly higher level of day use than overnight walkers with many people undertaking short walks at either end of the track and from the main accessible visitor nodes at Garie Beach and Wattamolla.

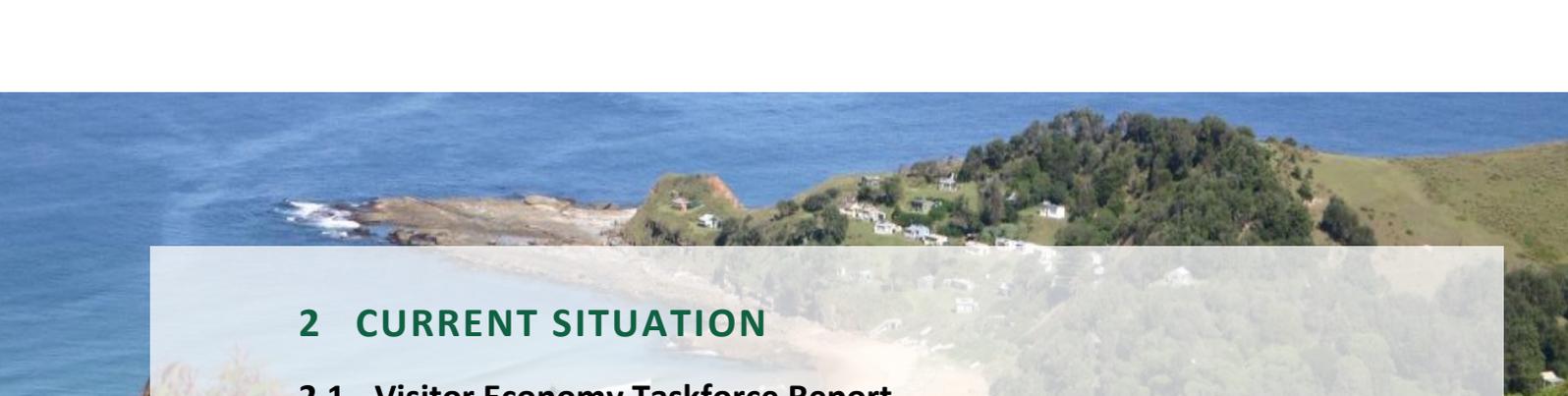
With aging infrastructure, limited resources and the established campsite regularly at capacity, NPWS has recognised the need to develop a vision and strategic management framework to develop the Royal Coast Track as a signature experience for the Sydney Harbour National Landscape.

This Strategic Framework is intended to guide NPWS in transforming the Royal Coast Track into an iconic, world class walk for contemporary visitor markets, both domestic and international. It addresses improvements in track networks, infrastructure, accommodation, services, interpretation and information needed to deliver outstanding walking experiences. It will provide a basis for seeking funding for and investment in track developments.

The improvements recommended are anticipated to have tourism, business and employment benefits for the region as well as encouraging some visitors to stay longer in Sydney.

The development of an iconic, world class walk needs to recognise that:

an experience is the sum total of an individual's personal interactions with places and/or people that awaken their senses, affect their emotions, stimulate their minds or leave them with a sense of connection to these places and people.



2 CURRENT SITUATION

2.1 Visitor Economy Taskforce Report

The NSW Government established the Visitor Economy Taskforce to consult with Industry and other stakeholders and to prepare a strategy for a stronger economy in NSW.

The recommendations and actions in the Visitor Economy Action Plan are aimed at accelerating overnight visitor expenditure to NSW and delivering on targets for growth.

The plan identified a series of challenges for NSW as a tourism destination including:

- ✓ A tough global environment: with a high Australian dollar having a significant impact on inbound and domestic tourism
- ✓ The domestic market has changed: The ratio of air to road travel into NSW has increased
- ✓ NSW is uncompetitive: NSW destination appeal has waned and its competitive position has been eroded
- ✓ Target markets: There has been insufficient focus and resources for key priority markets, and NSW has been losing relative share of international visitors from growth markets
- ✓ International air services: NSW has been losing share of air travel seats into Australia and therefore visitor expenditure from many key international visitor markets.¹

Important recommendations from the Visitor Economy Taskforce included delivering on the five principles underpinning the NSW Economic Development Framework:

- ✓ Demonstrate leadership. Champion growth through leadership, vision and partnerships
- ✓ Make it easier to do business. Reduce costs and provide greater certainty for industry
- ✓ Collaborate to drive innovation and competitiveness. Respond to new challenges, create new products and markets, and take advantage of emerging opportunities
- ✓ Invest in critical infrastructure. Plan strategic and efficient infrastructure needed to drive the economy
- ✓ Raise the global profile of Sydney and NSW. Promote NSW in a more strategic and coordinated way, to attract businesses, entrepreneurs and talent to the State

Other important recommendations that the Royal Coast Track can deliver or partially deliver on included:

- ✓ Relevant NSW Government Departments and agencies work with the Tourism Industry to clearly articulate responsibilities and establish milestones for the management and development of identified nature and heritage tourism experiences and develop a coordinated and more dynamic approach to delivery of these opportunities
- ✓ Identify and facilitate opportunities for commercial and strategic tourism partnerships and participation in National Parks, historic sites and other relevant State-operated Reserves and implement a plan to realise these opportunities
- ✓ Further develop and promote the Great Walks in NSW to enhance nature experiences

¹ Visitor Economy Taskforce Report, 2012

- ✓ Identify and release Crown Land suitable for visitor economy purposes, including caravan/ tourist parks, ecotourism, heritage, family or Aboriginal-based tourism developments, including in or adjacent to National Parks, State Forests and Reserves and other Crown Lands. Ensure that sustainable development and management practices are adopted
- ✓ Support Industry and Government initiatives to promote and expand career opportunities for Aboriginal trainees in visitor economy occupations
- ✓ Relevant NSW Government Departments and agencies work with the Tourism Industry to clearly articulate responsibilities and establish milestones for the management and development of identified nature and heritage tourism experiences and develop a coordinated and more dynamic approach to delivery of these opportunities
- ✓ Incorporate significant National Landscapes and World Heritage Areas within NSW into the relevant Destination Management Plans to better leverage these experiences and help grow visitation and spend
- ✓ Incorporate way finding and signage considerations for visitors to Regional NSW into relevant policies and guidelines and provide suitable facilitation to enhance the visitor experience
- ✓ Raise the profile of NSW's Aboriginal heritage and contemporary culture and further develop and sustain visitor attractions and experiences which tell the story of Indigenous Australia

2.2 Plan of management

The Royal and Heathcote National Parks, and Garawarra State Conservation Area plan of management was published in 2000. This document is currently being reviewed with a revised plan due to be released in 2014.

Community consultation as part of the plan of management process has been occurring in recent months. The Royal Coast Track has featured strongly in the comments received. The main issues raised have related to the importance of the track as part of the recreational opportunities for the park, its poor maintenance and condition and the lack of camping facilities.

New directions provided in this document will be able to be addressed in the new plan of management.

2.3 Effective environmental planning and management

The provisions of the National Parks and Wildlife Act and plans of management support and provide for recreation and tourism activities where they can be provided in a manner that complements the need to maintain the integrity of the natural and cultural values of the park.

Any improvements to the Royal Coast Track experience will need to be planned and managed to ensure best practice environmental management. Implementation will be guided by the National Parks & Wildlife Amendment (Visitors and Tourists) Act 2010 that includes sustainability measures including new sustainability assessment criteria.

2.4 Visitor use

It is estimated by NSW NPWS that:

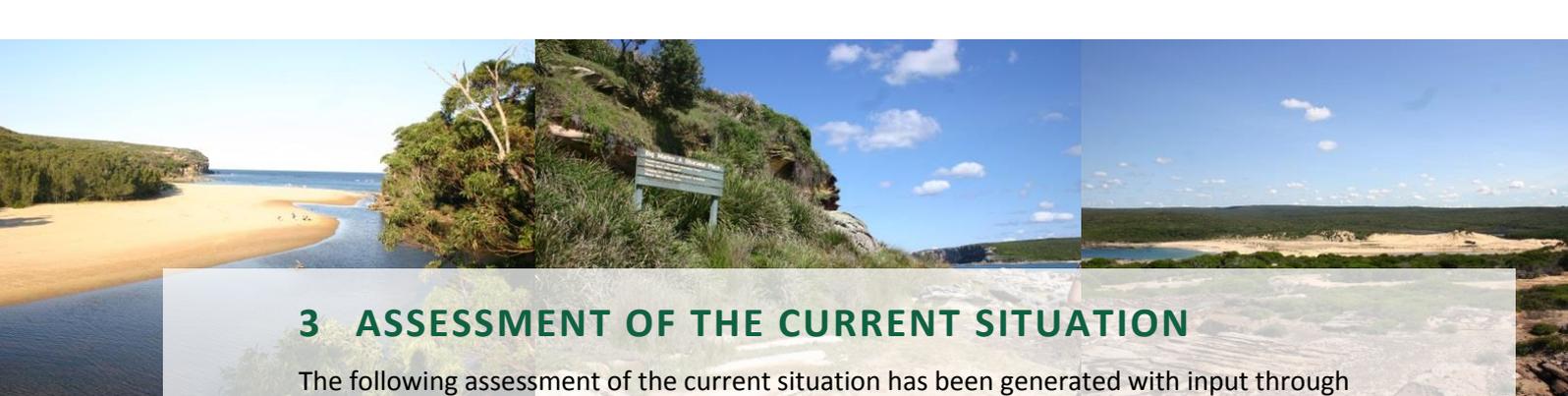
- ✓ 80,000 persons walk some part of the Royal Coast Track each year
- ✓ There are 9000 overnight walkers with roughly half of them camping outside approved campsites
- ✓ 636 school/group walkers over the period from December 2012 to March 2013
- ✓ In terms of commercial guided walkers, records provided by NPWS show that four main operators conduct guided trips on Royal Coast Track
- ✓ winter and autumn attracted the highest number of track walkers, many in large groups
- ✓ average number of visitors per trip was 17 people
- ✓ there has been a growth in trips and customer numbers over the period 2009-2011

2.5 Sydney Harbour National Landscape

Sydney Harbour is one of the 16 National Landscapes around Australia, Australia's National Landscapes program is a unique tourism and conservation partnership managed by Tourism Australia and Parks Australia. The program provides a framework to consider tourism infrastructure, conservation and marketing in a united way, encouraging collaboration and partnerships. It brings together the tourism industry and conservation sectors to improve environmental, social and economic outcomes for each landscape.

For Sydney Harbour the essence of its positioning is 'spellbinding' and experiences to deliver on that need to be underpinned by character values that are seductive, sensual, sparkling, vibrant, energetic, happy, free, informal, relaxed, pristine, romantic, raw and energising. (LEAP, 2013).

The Experience Development Strategy for Sydney Harbour is currently being developed, but it is expected that one of the priority projects within it will be developing the Royal Coast Walk as a 'must do experience' for the *Experience Seeker* market.



3 ASSESSMENT OF THE CURRENT SITUATION

The following assessment of the current situation has been generated with input through consultation and professional judgement to guide the approach to future management and development of the Royal Coast Track.

3.1 Strengths

- ✓ Location – close to Sydney and accessible by public transport at each end
- ✓ Biodiversity – significant natural values and species diversity including endemic heathland plants, rainforest and terrestrial and marine fauna
- ✓ Rich cultural heritage – both Aboriginal and post settlement
- ✓ Range of walk length options and loops including a very achievable overnight walk
- ✓ Outstanding scenic views and vistas to many directions
- ✓ Accessible waterfalls and water holes
- ✓ Strong awareness of Royal National Park across Australia and pre-existing awareness of Royal Coast Track
- ✓ Cabin communities with distinctive coastal architecture that are National Heritage listed for the social fabric of the communities over time
- ✓ On line booking system available for campsites
- ✓ Several commercial tour operators offering quality experiences
- ✓ Strong community support (Cabins community, Friends groups, community, tourism industry) for the upgrading of the Royal Coast Track as a signature experience

3.2 Weaknesses

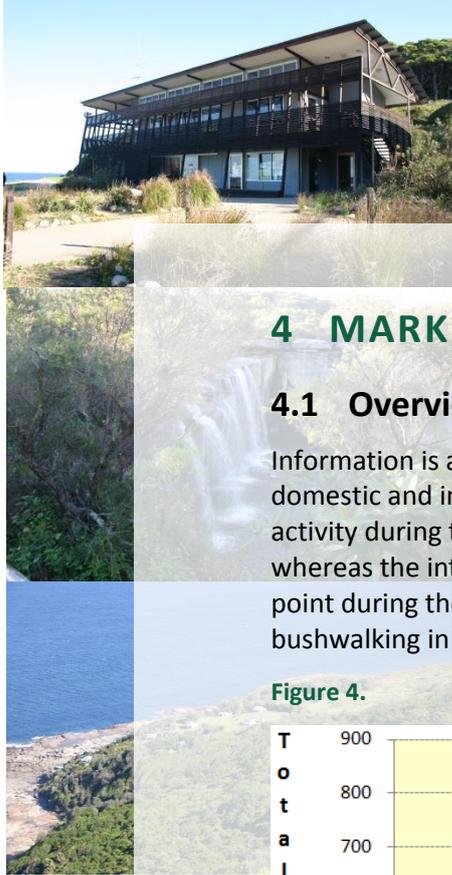
- ✓ Track condition is generally very degraded including areas of risk to visitors
- ✓ Track gateways offer poor experiences with inadequate parking, limited orientation or interpretive signage, inadequate way finding and generally poor overall experience
- ✓ Campsite facilities not optimal with boggy areas and toilet facilities in poor condition
- ✓ Access from Bundeena Ferry to the track head through Bundeena Village is difficult to find and a poor start to the walk
- ✓ Access between Otford Railway station and the southern track head is difficult to find and traverses the main road
- ✓ Limited campsite supply results in lack of capacity at weekends and other peak periods whilst lack of campsites at strategic locations on the track result in extensive illegal camping and impacts (at convenient distances from track heads)
- ✓ Camping restricted to one night only at a site
- ✓ Way finding signage is in poor condition and absent in many locations.
- ✓ Availability and quality of pre-trip information – not a seamless experience
- ✓ Ferry timetable does not allow for early starts which impacts on day walks
- ✓ Lack of accommodation in the region restricting overnight stays before or after walking

3.3 Opportunities

- ✓ Sydney Harbour National Landscape and the Experience Development Strategy that has identified Royal Coast Track as a potential catalyst project
- ✓ Promotion of the Royal Coast Track as an experience linked to the Grand Pacific Drive
- ✓ Training and capacity building of local Aboriginal community members as guides or other roles in local story telling
- ✓ Extending on line booking system for whole of walk products
- ✓ Enthusiastic and committed volunteers that are interested in supporting track upgrades, hosting people on the track and a range of other roles
- ✓ Additional campsites making walking days more achievable and balanced
- ✓ Extending the range of accommodation options offering different price points
- ✓ Additional funding opportunities through commercial investment, track fees, sponsorship
- ✓ Realignment of some track sections creating better and more sustainable experience
- ✓ A distinctive Royal Coast Track brand consistent with NPWS direction that is used at every touch point including directional totems
- ✓ Public transport or commercial shuttle service to trailheads
- ✓ Community and business involvement in track experience offering
- ✓ Linkages to walks in the south (Illawarra) and Sydney Harbour offering longer walks for other markets through promotion or packaging of available links

3.4 Threats

- ✓ Competition from many other walking products including new experiences with significant funding (eg Three Capes in Tasmania)
- ✓ Without significant funding the track is a hazard and will be positioned as such in the market
- ✓ Promotion before the track has been upgraded could lead to word of mouth negative impact on the appeal of a new product
- ✓ Resources for new development and long term maintenance
- ✓ Environmental impacts from ongoing unmanaged campsites
- ✓ Variations in Australian dollar and rising transport costs could impact on travel patterns

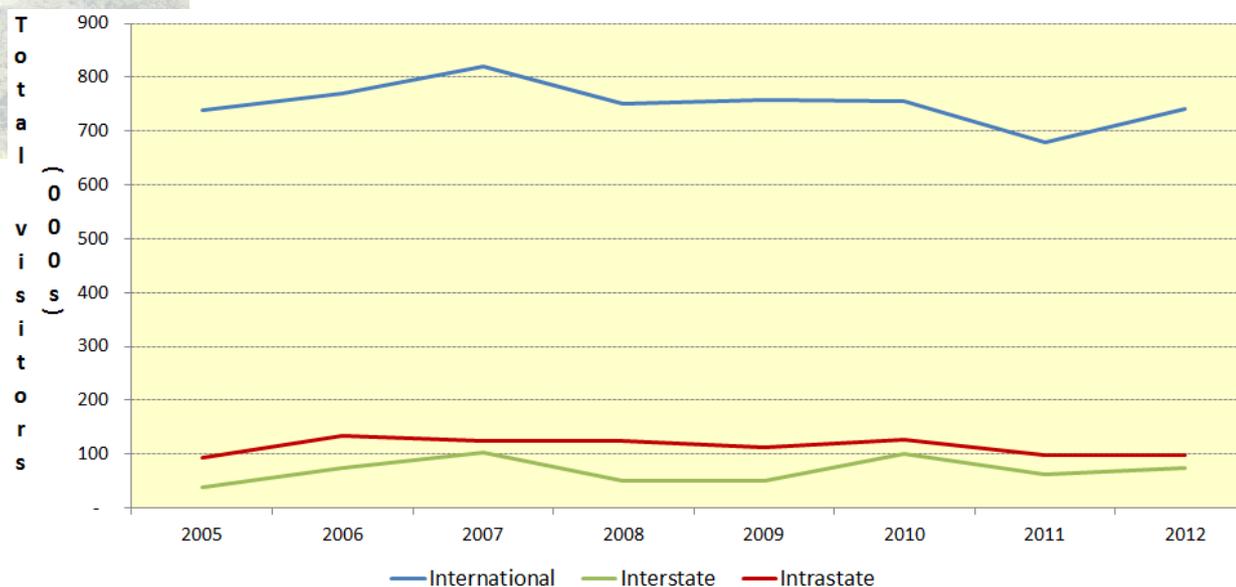


4 MARKETS FOR THE ROYAL COAST TRACK

4.1 Overview

Information is available from Tourism Research Australia regarding the number of daytrip, domestic and international overnight visitors to Sydney who participate in bushwalking as an activity during their trip². For the domestic data the activity occurs in the specified region (Sydney) whereas the international visitors may have undertaken a bushwalk or rain forest walk at any point during their stay in Australia. The number of overnight visitors who have participated in bushwalking in Sydney over the period 2005-2012 is summarised below (Figure 4).

Figure 4. Overnight Visitors to Sydney who Bushwalk



In 2012 there were 742,000 international overnight visitors to Sydney³ who participated in bushwalking / rain forest walks as a component of their stay in Australia. Of this group 219,000 were classified as backpackers.

There were also a total of 75,000 interstate overnight visitors, 99,000 intrastate overnight visitors and 331,000 intrastate daytrip visitors in the Sydney region that participated in bushwalking / rain forest walks in 2012.

The number of intrastate overnight visitors to Sydney who bushwalk has remained relatively stable since 2005. The linear trend in international visitors has fallen by 7% between 2005 and 2012 while the linear trend in interstate visitors has increased by 25% over this period.

² Tourism Research Australia. National Visitor Survey. International Visitor Survey. The activity is specified as 'bushwalking / rain forest walk'. For the domestic data the activity occurs in the specified region (Sydney) whereas the international visitors may have undertaken a bushwalk or rain forest walk at any point during their stay in Australia. To qualify as a day trip the trip must be of a non-routine nature, at least 4 hours in duration and involve a round trip of 50 kms.

³ For NSW there were 792,000 international visitors, 749,000 interstate visitors, 1,528,000 intrastate overnight visitors, and 1,645,000 intrastate day trip visitors who participate in bushwalking / rainforest walks as an activity.

4.2 What we know about the multi day walk market

Very limited research has been undertaken into the multi day walk market.

The following summary draws on our professional knowledge and recent discussions with industry networks. It also draws on previous work we have done with consumer focus groups when testing other multi day walks across Australia.

Demand

Societal trends including aging population, travel costs and consumer preferences did, in recent years, result in a shift in demand from the traditional multi day independent bushwalking trips to a greater demand for soft adventure, comfort and security offered by commercial operators. This trend appears to have plateaued, potentially due to economic issues as well as the high apparent costs of fully packed multi day walks compared to other types of holidays that are being offered at competitive rates.

Surveys of walkers and discussions with commercial tourism operators suggest that walkers undertaking or interested in 'great walks' tend to have particular characteristics including:

- ✓ higher than average levels of education, and engaged in professional or similar occupations
- ✓ come from households with higher than average levels of income
- ✓ independent walkers tend to be in the younger to middle age groups, while walkers on commercial tours tend to be over 45
- ✓ travel to the area specifically to walk the trail
- ✓ on some trails, relatively high or increasing proportions of walkers come from interstate or overseas (e.g. on the Overland Track in the 2005-6 peak season, 58% of walkers were from interstate and 35% from overseas)
- ✓ are aware of, or have undertaken, similar walks in Australia or overseas
- ✓ a proportion (especially in the middle to older age groups) are 'comfort seekers', in that they seek adventure, but supported by options such as guides, transport of overnight packs, and roofed accommodation

Some of the critical success factors for high quality iconic walks include:

- ✓ An existing high profile in the marketplace for the destination in which they are located
- ✓ Other complementary nature based attractions, products and infrastructure in the region
- ✓ Ability to cater to both independent and guided walkers

Supply

There has been a significant investment in multi day walks by Government in recent years that has resulted from the perceived success of walks such as the Overland, Larapinta, Routeburn, Tongariro Crossing and Milford Tracks.

Commercial walking operations are not always profitable. It takes several years for an operator to establish a successful walk business, with the more successful ones being those that have a suite of products that are available across the seasons (sometimes across Australia) and attract repeat customers.

Australia's Great Walks is a recent joint initiative between Tourism Australia and industry. It has, to a certain extent, stemmed from a decline in demand for the range of products that is on offer in the multi day walk sector. Through collaboration and focused marketing, the intent is to strengthen the awareness and appeal of Australia as a walking destination and offer a range of immersive nature experiences.

The Great Walks are:

- ✓ Bay Of Fires
- ✓ Cradle Huts
- ✓ Freycinet Experience
- ✓ The Arkaba Walk
- ✓ The Maria Island Walk
- ✓ The Great Ocean Walk
- ✓ The Larapinta Trail

In summary the Great Walks of Australia offer the following:

- ✓ Showcase an iconic journey style walk that takes place in a natural (Tourism Australia designated National) landscape, that does not utilize the same trail as another GWOA member
- ✓ A world's best tour operator that provides high quality overnight (3 days or more), guided walk experiences, with a defined season and significant levels of scheduled inventory
- ✓ Have exclusive access to a high standard of unique accommodation that is fit for purpose and supports directly the member walk
- ✓ Caters for small groups, the size appropriate to the trail being undertaken
- ✓ Demonstrate excellent standards of 'Aussie hospitality' (including food & beverages and a distinctly Australian style of unpretentious service)
- ✓ Is an accredited tourism operator with relevant state based parks agency & has achieved all necessary and relevant tourism & business accreditations
- ✓ Is endorsed by National, State or Territory Tourism Authorities and can demonstrate participation in marketing and media programs
- ✓ The destination and product has appeal to international visitors to Australia
- ✓ Demonstrate an obvious level of innovation and are clearly aiming to be the best, with a reputation as the benchmark in their given journey walk
- ✓ Can demonstrate business viability and sustainability either through a proven track record of similar operation or duration of operation of the proposed member walk

Whilst most of these attributes would be relevant for a new walk product, creating a point of difference from others is a critical consideration. Not all the markets want to walk for more than three days.

There is a need to be clearly focused on offering a distinctive experience on a multi-day walk given the increasingly cluttered market. A consumer needs to be able to determine what the offering is for that track as they have different preferences. Anecdotally, some iconic walks have had a large number of operators and only a few have survived.

For a new walk to be successful it will need to be distinctive and offer something outstanding rather than more of the same.

Economic benefits of trails

The development of trails has become a significant feature of tourism development in many areas. Several overseas and Australian studies indicate that significant benefits can flow to local economies in the area of well promoted and serviced long distance walking and cycling trails. Trail tourists tend to stay longer in an area and, due to the slower pace of travel and need for provisions, equipment and transport, can be significant spenders in local businesses and generate development of tourism facilities.

4.3 Target markets

Recent Tourism Australia research has shown that:

- ✓ Australia's biggest strength is its **world class nature**, well regarded from all markets and core to our global tourism offering
- ✓ The greatest drivers of international visitor demand to Australia are **coastal (including beaches), aquatic and wildlife experiences**
- ✓ Tropical North Queensland, **Sydney**, and the Gold Coast continue to rank highest for uniqueness and appeal (Tourism Australia 2012)

The international *Experience Seeker* represents the target market for a world class guided walking experience on the Royal Coast Track. The opportunity is here to offer an exceptional world class nature experience that showcases the coast close to Sydney. By making it a short but immersive experience, it will be different to the various longer walks on offer elsewhere and can be compelling to include in a Sydney itinerary.

By getting it right for the *Experience Seeker* it will be attractive to the other markets.

True Travellers are a domestic market segment similar to the *experience seekers that are seeking immersive nature based experiences*. These visitors are more likely to be independent but may stay overnight.

Each of these markets will respond if provided with a compelling reason to visit and overnight stays encouraged.

Existing Overnight Visitors to the Park

It is estimated that there are currently around 9,000 overnight visitors to the Royal National Park with around half (4,700) staying on managed campsites and the remainder camping informally.

The demand from school groups staying overnight in the Royal National Park is estimated to be around 1,500 per annum based on 4 months of data.

4.4 Potential for growth

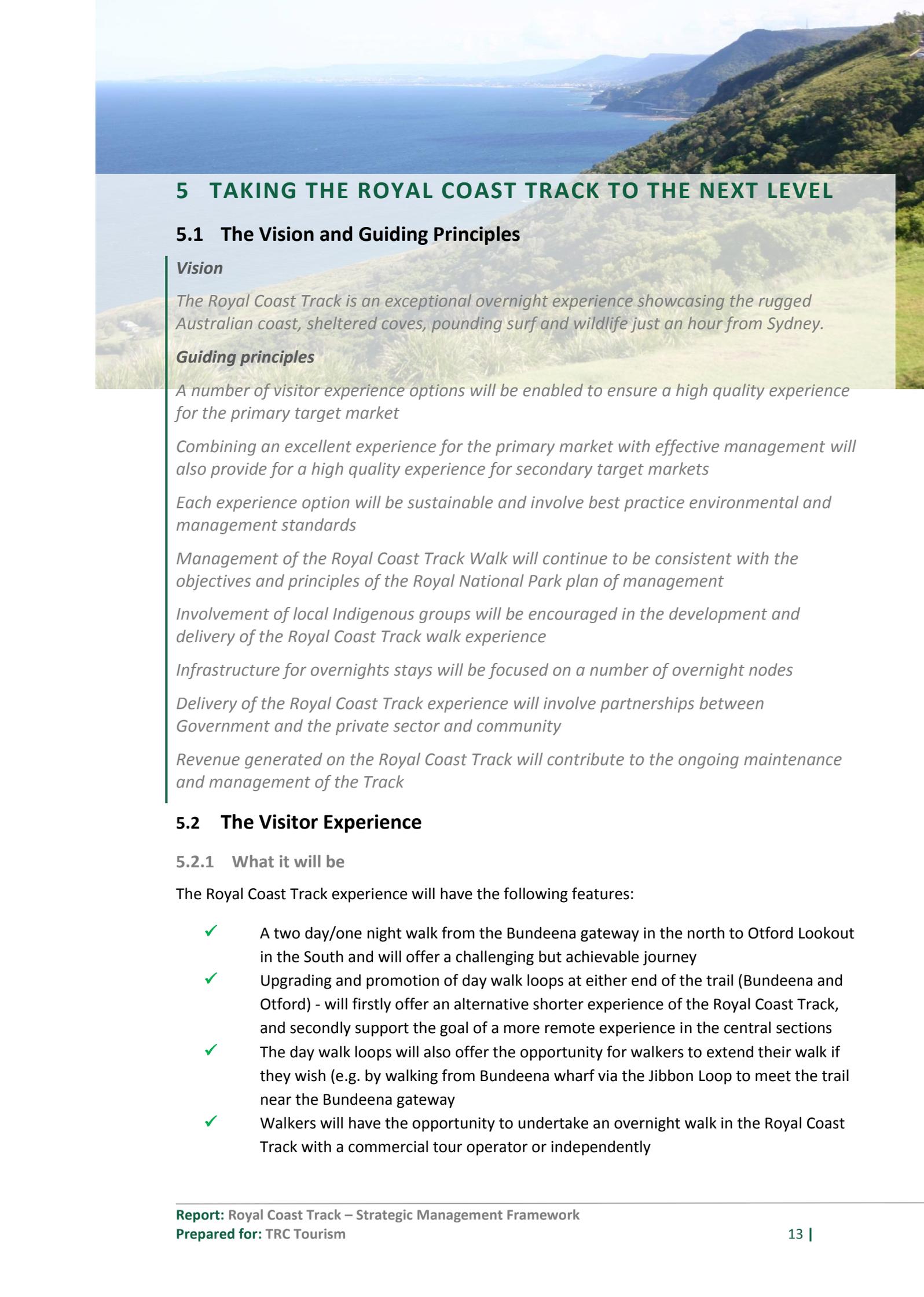
The projection for overnight visitor demand will depend on the improvements made to the infrastructure in the Park. There is considerable potential to increase overnight stays in the park if appropriate infrastructure development, private sector investment and promotion occurs. Some of this growth will come from conversion of existing day visitors to stay overnight due to increase in camping capacity, new accommodation options, improved infrastructure and product

marketing. Attracting *Experience Seekers* to the Royal Coast Track will be predominantly new growth.

4.5 What do the consumers want

If visitors are to be attracted to the Royal Coast Track, their expectations must be met. In our experience, the following are critical factors in what the consumer is seeking based on the mindset and expectation of the *experience seeker* market:

- ✓ A distinctive and special overall experience
- ✓ Diversity in the environment through which the walks passes – not all along a beach or through a forest, but changing environment, scenery and topography
- ✓ Daily journeys of between 9 and 15 kilometres or around 5 hours walking
- ✓ Good environmental management and management of the product
- ✓ Good quality infrastructure – safe track suitable to terrain, attractive amenities (fit for the experience level), inviting gateway
- ✓ Choice of accommodation options (camping or other semi-permanent or relevant accommodation as determined for the particular experience)
- ✓ Potential to choose guided or independent walk
- ✓ Loop walk or transport that allows for a seamless travel experience from an end to end walk
- ✓ A level of certainty about the experience they will get such as s afforded through r pre booking accommodation or campsite
- ✓ Good way finding that is non-intrusive
- ✓ A choice of interpretation options to suit a range of different delivery styles and depth of desire for learning
- ✓ Good quality and easily accessible pre-trip information



5 TAKING THE ROYAL COAST TRACK TO THE NEXT LEVEL

5.1 The Vision and Guiding Principles

Vision

The Royal Coast Track is an exceptional overnight experience showcasing the rugged Australian coast, sheltered coves, pounding surf and wildlife just an hour from Sydney.

Guiding principles

A number of visitor experience options will be enabled to ensure a high quality experience for the primary target market

Combining an excellent experience for the primary market with effective management will also provide for a high quality experience for secondary target markets

Each experience option will be sustainable and involve best practice environmental and management standards

Management of the Royal Coast Track Walk will continue to be consistent with the objectives and principles of the Royal National Park plan of management

Involvement of local Indigenous groups will be encouraged in the development and delivery of the Royal Coast Track walk experience

Infrastructure for overnights stays will be focused on a number of overnight nodes

Delivery of the Royal Coast Track experience will involve partnerships between Government and the private sector and community

Revenue generated on the Royal Coast Track will contribute to the ongoing maintenance and management of the Track

5.2 The Visitor Experience

5.2.1 What it will be

The Royal Coast Track experience will have the following features:

- ✓ A two day/one night walk from the Bundeena gateway in the north to Otford Lookout in the South and will offer a challenging but achievable journey
- ✓ Upgrading and promotion of day walk loops at either end of the trail (Bundeena and Otford) - will firstly offer an alternative shorter experience of the Royal Coast Track, and secondly support the goal of a more remote experience in the central sections
- ✓ The day walk loops will also offer the opportunity for walkers to extend their walk if they wish (e.g. by walking from Bundeena wharf via the Jibbon Loop to meet the trail near the Bundeena gateway)
- ✓ Walkers will have the opportunity to undertake an overnight walk in the Royal Coast Track with a commercial tour operator or independently

5.2.2 What it won't be

Whilst opportunities exist for the Royal Coast Track to be linked to the Illawarra to create a longer walk, given the number of other competitors that offer a 3-4 days overnight coastal walk, it is recommended that the focus with the Royal Coast Track should be on creating *an extraordinary overnight walk*.

Likewise, links to the north into Sydney Harbour and the array of other great walk options in the Sydney Harbour National Landscape should be by providing information about options and product packaging by commercial operators rather than by track development to link tracks.

Due to topography, issues of environmental and social capacity, and availability of options for mountain bikes elsewhere, the Royal Coast Track is proposed as *a walker only* experience. Specifically:

- ✓ The gradient of the current trail is steep and erodible - the ideal design grade for mountain bike use would not exceed 10% - it would require many kilometres of new trail to achieve this
- ✓ The majority of the current track treatments are not compatible with mountain bike use
- ✓ The cost of re-aligning and upgrading the current alignment for bi-directional, multi-use would many times more than the budget required to upgrade the current alignment for walking use only
- ✓ The Royal Coast Track has an existing identity and appeal to walkers seeking an experience relatively close to civilisation which needs to be further developed to deliver the vision. This appeal would change if the track was to be shared with a significant number of cyclists
- ✓ In the Royal National Park Visitor Survey conducted on the condition and use of the Royal Coast Track (Bajpai, 2010), 89% of visitors identified they did not want bicycles allowed on the track

5.2.3 How it will look and feel

The Royal Coast Track will offer the following experience:

- ✓ Walkers will feel part of the spectacular coastal scenery, pounding surf and intimate hinterland environment. Their journey will be one of sight, sound and smell
- ✓ There will be a sense of remoteness and separation from the urban environment
- ✓ They will be challenged and feel a sense of achievement when they finish the walk
- ✓ They will be surprised by many things - by the ocean stretching out before them beyond a bend in the track, by a friendly Australian in one of the shack communities, by the native fauna in its own secret habitat
- ✓ They will have seen, heard, smelled and appreciated the native flora and fauna of the Sydney region
- ✓ They will have heard and understood the story of the Aboriginal people of the area
- ✓ Whilst they will have had an exceptional journey, they will be tempted to return in another season to experience the differences in the walk across the year (the whale season, the winter, the warm summer)

- ✓ Visitors will have a range of opportunities to immerse themselves in the stories of the walk through guided experiences, contemporary interpretative approaches, interaction with communities on the coast and a range of pre and post trip information. They will have been able to choose a preferred accommodation option

5.2.4 The Values of the Royal Coast Track

The walk needs to be developed and managed with the overall values in mind to ensure that the experience is able to deliver something distinctive for the Sydney Harbour National Landscape.

Remoteness close to an urban area:

- ✓ Unspoiled coastline and hinterland
- ✓ Raw and rugged coastal features
- ✓ Overnight nodes away from traffic

Solitude:

- ✓ Place where you can experience remoteness and solitude
- ✓ Sections of coastline only accessible by foot
- ✓ Limits on the number of walkers at overnight nodes
- ✓ Separation of large groups from others

Landscape:

- ✓ Rugged coastal scenery
- ✓ Exceptional lookout points to the coast, many of which take you by surprise
- ✓ Hinterland heath and rainforests
- ✓ River estuaries

Flora & Fauna:

- ✓ Extensive range of birds including coastal and wetland species, birds of prey and migratory species
- ✓ Marine mammals with exceptional whale watching during the migration season
- ✓ Reptiles, amphibian, invertebrates and 43 native mammal species many of which can be seen on the track, particularly in the evenings
- ✓ Range of habitats including rainforests, heathlands, saltwater wetlands and a diversity of native plants species

Indigenous culture:

- ✓ Indigenous history, stories and traditional use of the area
- ✓ Physical artefacts, signs of former occupation
- ✓ Spiritual stories and significant sites not all of which can be accessed
- ✓ Interaction with local indigenous groups

Social history and community:

- ✓ National heritage listed coastal communities
- ✓ Shack culture and architecture
- ✓ Interactions with cabin communities

Recreation and adventure:

- ✓ Coastal and bush walking
- ✓ Camping
- ✓ Canoeing, kayaking, Surfing, diving and snorkelling

5.3 Delivering the Experience

Achieving the Vision for the Royal Coast Track as an exceptional overnight experience that meets the expectations of new and core markets will require:

- ✓ Management to retain the critical values that make it distinctive
- ✓ An upgraded track that continues to be maintained to a high standard
- ✓ Appropriate accommodation options for new and core markets
- ✓ High quality support infrastructure and services (gateways, lookouts, interpretation and information and access and transport)
- ✓ Effective management

5.3.1 Retaining the values

Achieving the sense of remoteness that will make the overnight Royal Coast Track experience special on an already high use track will benefit from a number of initiatives including:

- ✓ Developing, managing and promoting the north and southern ends of the trail as high quality day walk experiences in the Royal Coast Track
- ✓ Re aligning the route for the Royal Coast Track around the main visitor nodes of Wattamolla and Garie rather than the current alignment through the nodes
- ✓ Establishing, maintaining and booking separate overnight nodes for groups that use the trail
- ✓ Establishing a limit of 15 on group size
- ✓ Managing overnight numbers through a booking system that maximises the number of people camping on the Royal Coast Track at any time to the maximum number provided for at campsites and accommodation
- ✓ Through the booking system, encourage north to south travel which will assist in minimising interactions on track and also improve efficiencies for transport/shuttle operators
- ✓ Enabling high quality sustainable commercial tour operators offering overnight experiences with a maximum of three operators being licensed to operate overnight trips (consistent with three sites being available for EOI by operators). This situation could be review after a period of five years to allow for demand to establish, grow and be evaluated

5.3.2 The Track

The two day walk

- ✓ Trail infrastructure and alignment will provide for necessary walker amenity and environmental protection while providing a safe, enjoyable and varied remote walking experience. The trail will be aimed at Australian NZ Walking Track Standard Class 3 although some sections due to topography and design will be more aligned to Class 4. Walking Track standards and classifications are described in Appendix D
- ✓ Class one and two may be developed close to visitor nodes and possibly on sections of the 'bookends' at Otford and Jibbon Head

The current alignment of the Royal Coast Track is only suitable for pedestrian use. This alignment is inappropriate for use by mountain bikes.

Day walks

Ensuring a high quality overnight walk that meets the vision will require management and promotion of those areas that will be more suited to higher volumes of day walkers.

It is proposed that promotion for day use of the Royal Coast Track encourage the following loops.

Bundeena Jibbon Head loop - Easy walk less than half a day

The Jibbon Lookout proposal would add significant interest to this walk and would provide for an Aboriginal focus and opportunity for guiding and interpretation by Aboriginal community.

Otford Garawarra Ridge Trail - South Era and return via Royal Coast Track - Half day/day

Upgrading Otford Lookout (further discussed in section 5.3.4) and the development of a high quality appropriate lookout on the South Era track would add value to the day walk experience of this loop.

5.3.3 Overnight accommodation

One of the weaknesses discussed extensively relates to the limited capacity for camping and limited options for accommodation on or near the track. With one legal campsite only, there is considerable illegal camping. Other options spaced to allow for more balanced walk distances over a two day walk are required.

Recommended *overnight accommodation* options include:

Commercially guided and independent visitor precincts

Seek Expressions of Interest from the private sector for the establishment and operation of two overnight nodes on the Royal Coast Track as follows.

Site infrastructure to be provided and managed by the operator to include:

- ✓ High quality design of sustainable semi-permanent eco accommodation suited to market to accommodate up to 20 people with appropriate amenities, cooking and eating facilities
- ✓ Camping area separated from roofed accommodation with tent platforms to accommodate up to 12 tents with appropriate amenities and cooking shelter

Government investment in independent walker infrastructure (tent platforms, amenities, camp kitchen) would be appropriate.

Development can be staged as demand increases (one precinct only to start with if insufficient private sector interest and/or camping only in the first stage).

Precincts to be offered for operator selection to include the following:

- ✓ Little Marley
- ✓ Providential Point
- ✓ Curracurang
- ✓ Garie North

The management/packaging of the semi-permanent accommodation will be at the operator's discretion and could be by commercial guided tour only, or able to be booked with the operator by independent walkers.

The operator will be required to manage/maintain the independent camping sites, but bookings will be linked to the NPWS website.

Should there be no take up of commercial sites, NPWS could establish and maintain independent campsites with the option of transferring to the private sector if interest emerged.

Investigate possibility of shacks/cabins being refurbished or rebuilt on existing cabin footprint operated under lease by EOI available for self-catered accommodation.

Group precincts

Ensuring the vision for a high quality visitor experience of the Royal Coast Track for the primary target market of *Experience Seekers* will require separation of large groups from independent and small groups of walkers. The track is currently used by many schools, scouts and Duke of Edinburgh groups.

The following approach is proposed:

1. NPWS to upgrade and retain North Era as a group camping node for up to 50 people that must be booked with facilities to include tent platforms, amenities and camp kitchen.
2. Consider options for the establishment and management of facilities suited to groups at Garie Beach including the extensive site at the rear of the car park

Map 2 shows the potential locations of all overnight nodes and Map 1 shows walking distances that would be required if any of the commercial/independent overnight node options were established.

Other accommodation links

Work being carried out by Sutherland Shire at the present time indicates a shortage of accommodation for visitors to the area. Pursuing investment in a range of additional accommodation options in the Bundeena precinct to complement the current supply of rental houses and Bed and Breakfast (2) properties will add to the value proposition for the market. It would allow for an overnight stay before a walk as well as a hub from which walkers can be transported to trailheads.

An earlier master plan for *Bonnie Vale camping area* identified the potential for diversifying the range of accommodation within that precinct. Adding eco accommodation, cabins or other similar commercial facilities would improve the potential for an overnight stay before a walk, and would offer increased revenue return from the site.

Concepts for commercial tented accommodation or similar being developed on the *Scout owned land* adjacent to the Bundeena trailhead would add another opportunity.

Each of the concepts mentioned here would require private sector investment and would be driven by commercial demand scenarios.

Re-furbish *Garrawarra Farm* as accommodation suited to groups including priority use by local Indigenous groups for cultural programs (and investigate management options).

Off track accommodation (e.g. other self-contained cottages in Royal National Park; eco camp, cabins and guest houses in Bundeena) will also be able to be accessed if a commercially viable shuttle service were established to transport people to and from trailheads.

Map 1. Location of Overnight Visitor Nodes on Royal Coast Track



Map 2. Proposed commercial and independent walker overnight nodes on Royal Coast Track



5.3.4 Gateways

The current Bundeena gateway experience is extremely poor with limited parking, degraded signage and no interpretation. Walking from the Bundeena Wharf to this gateway is through streets with no signage and easy for the visitor to become lost.

The Otford gateway is a high volume roadside lookout point with clutter and confusion about the visitor experience, opportunities and trackhead. It is difficult to find the track between the railway station and the start point.

The gateway to an iconic track is an important facility that offers a sense of place as well as an opportunity for visitors to orient themselves before departure. It needs to include the following:

- ✓ Adequate safe and secure car parking
- ✓ Information and interpretation about the track
- ✓ Possibility of downloading qcode application with track notes
- ✓ The first experience of effective way finding for the visitor giving them an appreciation of what they will be looking out for

Detailed planning is required for both the Bundeena and Otford gateways as follows:

Bundeena gateway

With likely handover of current Council land slightly beyond the current gateway, this site could be planned for a high quality gateway location with adequate parking, day use facilities and a significantly improved visitor experience. An easy trail re alignment would link to the current Royal Coast Track from this location to connect with the Jibbon Head loop for the Bundeena wharf.

An option may exist to have a boom gate at the current gateway with pay and display parking that can contribute to track and park management.

Otford gateway

Otford lookout offers spectacular views of the South Coast as a popular stopping point. The creation of an exceptional lookout as part of the Grand Pacific Drive offering would be beneficial. Design of such a lookout would allow for separation of vehicular traffic and walkers and allow for a stronger gateway experience for the Royal Coast Track.

5.3.5 Lookouts

There are many natural lookout points on the Royal Coast Track, and some recommended re-alignments will create other exciting and surprising viewpoints. Formal lookout points are not required in the central and 'remote' parts of the track.

Upgraded lookouts that offer outstanding visitor experiences would, however, add to the attraction of the day walk loops proposed and strengthen the value proposition of these walks for the day visitor market.

The following are proposed (in priority order):

- ✓ Jibbon Head Lookout
- ✓ Otford Lookout
- ✓ South Era lookout

A significant opportunity also exists for an outstanding lookout over, but not on, the Royal Coast Track at Governor Game Lookout that would add to the overall Royal National Park opportunities.

5.3.6 Interpretation and information

A variety of interpretation will be offered across the trip cycle:

- ✓ Effective, well maintained way finding system based on NPWS signage manual and including Royal Coast Track brand image
- ✓ Royal Coast Track web page and booking system linked to NPWS website
- ✓ High quality downloadable and app based Royal Coast Track guide
- ✓ Information and interpretation at trailheads
- ✓ QR codes at significant locations with on line story telling (eg Aboriginal Welcome at gateways, story-telling at some sites, bird calls etc.)
- ✓ Trained and accredited guides employed by commercial tour operators

There will be an opportunity to have the Aboriginal history and stories of the area interpreted by an Aboriginal guide or information provided by them. This could be on track or at the overnight nodes

5.3.7 Access and transport

Ready access to transport to create a seamless experience is essential to the Royal Coast Track. The opportunity to access the Royal Coast Track by public transport from Sydney is a real strength of the location. The following would assist in improving this as a seamless experience:

- ✓ Royal Coast Track packages including train fares City to Cronulla and return from Otford plus ferry from Cronulla to Bundeena
- ✓ Re-alignment of track from Bundeena Wharf via Jibbon Lookout rather than through township
- ✓ Economical commercial shuttle service that offers transport from off track accommodation (Bundeena, Royal NP cottages, off park) to trailheads at start or finish of days walk

5.3.8 Linkages to other areas

Whilst opportunities exist for the Royal Coast Track to be linked to the Illawarra to create a longer walk, given the number of other competitors that offer a 3-4 days overnight coastal walk, it is recommended that the focus with the Royal Coast Track should be on creating an extraordinary overnight walk.

Likewise, links to the north into Sydney Harbour and the array of other great walk options in the Sydney Harbour National Landscape should be by providing information about options and product packaging by commercial operators rather than by track development to link tracks.



6 CHALLENGES AND CRITICAL ACTIONS TO DELIVER THE EXPERIENCE

6.1 Significant challenges

The two greatest significant challenges for delivering the vision for the Royal Coast Track outlined in this document are the following:

- ✓ The **scale of resources** required to bring the track infrastructure up to the standard necessary for an icon walk due to the current condition of track from environmental, risk management and visitor amenity viewpoints
- ✓ Creating a **sustainable funding model** to enable the Royal Coast Track experience to continue to be delivered at a high standard once it is in place

Overcoming the first challenge will require significant Government investment in a staged approach to infrastructure upgrade over a short period of time.

The suggested approach to overcoming the second challenge relies on the recommendations in this document to enable a small number of private sector operators to invest in the experience in partnerships with Government. Initial discussions suggest this is achievable.

6.2 Defining the Business Model

The financial and business model is based around the premise of government building the infrastructure (e.g. track upgrades and roofed accommodation) and the private sector providing the products and services to operate an iconic two day walking experience as shown in Table 6.

Table 6 Proposed investment roles for Royal Coast Track experience development

Business Element	Government	Private sector	Other
Capital Investment -track upgrade, gateways, toilets	✓		✓
Capital Investment – semi permanent and other accommodation		✓	✓
Capital Investment – independent camping sites	✓		
Track maintenance	✓	✓	✓
Accommodation maintenance		✓	
Independent camping sites maintenance	✓	✓	
Transportation for walkers		✓	
Marketing	All plus TA, DNSW		

6.3 Critical actions

As the project unfolds the following will need further consideration and management.

6.3.1 Plan of management

With the plan of management currently being reviewed it is timely to include those actions and requirements within this document as variations to the earlier plan. The main changes will relate to precincts in which camping and overnight accommodation would be permissible. Enabling flexibility for additional nodes over time would be recommended.

6.3.2 Attracting private sector and community investment in experience delivery

Stimulating long term private sector and community investment in delivery of the Royal Coast experience will be essential. Ideally, with appropriate resources, NPWS will do the base infrastructure works including track upgrade, campsite and associated facilities. The role of the private sector would be to address market needs such as accommodation development as well as ongoing delivery of packaged and guided walks.

There is a range of ways in which this document proposed to engage the private sector and potentially community groups. These are:

- ✓ *Overnight visitor nodes* – staged approach to delivery of private operator semi-permanent accommodation and independent walker camp sites at ‘remote’ locations
- ✓ Refurbish or rebuild vacant *shack/cabins* for overnight accommodation

The goal is to have viable businesses operating within the park that can support NPWS in management of public infrastructure as part of lease negotiations. This will require a limited number of operators permitted to offer overnight walks on the track (at least in the initial period).

A broad scale Expression of Interest for experience delivery on the Royal Coast Track is suggested as a means of seeking investment.

Community groups (such as shack community) may see themselves as able to play a role in experience delivery and can respond to the opportunities available.

Implementation of the Royal Coast will be guided by the *National Parks & Wildlife Amendment (Visitors and Tourists) Act 2010* that includes sustainability measures including new sustainability assessment criteria.

6.3.3 Visitor management

Achieving and maintaining a high quality visitor experience will require considerable resources. Staff will need to be committed to delivering a high standard of customer service and visitor management. Resources required will include initial investment plus long term maintenance. The model presented in this report suggests engagement with the private sector for the development and ongoing maintenance of overnight nodes. There is considerable interest from friends group and cabins community to be involved on the Royal Coast Track experiences, and negotiating a specific and clearly defined role for these groups in track maintenance and visitor interaction would be invaluable.

6.3.4 Other actions

Site planning

Each visitor node will require detailed site planning to ensure a high quality experience is delivered and natural and cultural values protected.

Booking system

Adopting an on-line booking system based on NPWS website will improve the visitor experience and enable people to be confident they will have a remote on-track experience. In addition to campsite fees, the booking system should include a package price for use of the track that will include a fee for booking, trail use and information. Private accommodation bookings will need to link in.

This will also enable NPWS to better monitor track use and manage the visitor experience and the park.

Marketing

A Marketing and communication plan will be required to be developed as the Royal Coast Track experience is developed. This would not be done until such time as there is new news to deliver.

6.4 Concluding comment

There is no walk at the present time in Sydney that offers the type of experience that will attract the Experience Seeker market to travel to the Sydney Harbour National Landscape.

None of Australia's Great Walks is in New South Wales.

If the Royal Coast Track is planned, delivered and promoted well, it can fill this gap.

YOUR COMMENTS

We would value your input on this document.

**Please provide any comments or feedback by July 6 to
sophie@trctourism.com**

