SUNSHINE COAST HINTERLAND
NATURE BASED TOURISM PLAN

Prepared for Tourism Queensland and Tourism Sunshine Coast

Images from Tourism Queensland

September 2009

SUNSHINE COAST HINTERLAND NATURE-BASED TOURISM PLAN

prepared for

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Inspiring Place Pty Ltd
Environmental Planning, Landscape Architecture, Tourism & Recreation
208 Collins St Hobart TAS 7000
T: 03) 6231-1818 F: 03) 6231 1819 E: info@inspiringplace.com.au
ACN 58 684 792 133

Fiona Murdoch
Horizon 3

08-65

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EXECUTIVE SUMMARY

Tourism Queensland and Tourism Sunshine Coast recognise the importance of taking a strategic long-term approach to destination planning, development and management of the nature-based tourism product and experience within the Sunshine Coast Hinterland.

The need for the development of an integrated nature-based tourism plan for the Sunshine Coast Hinterland was also recommended in the *Draft Regional Tourism Investment and Infrastructure Plan*[1], developed during 2008 as a joint project between Tourism Queensland and Tourism Sunshine Coast.

Inspiring Place, in conjunction with Horizon 3, were engaged in late 2008 by Tourism Queensland and Tourism Sunshine Coast to prepare the *Sunshine Coast Hinterland Nature-based Tourism Action Plan.*

The primary objectives of the Plan are to:

- provide a shared, strategic approach to the development of nature-based tourism infrastructure, visitor experiences and access in the Sunshine Coast Hinterland in line with market needs;
- determine key nature-based assets both within and outside of protected areas, and identify associated development opportunities;
- identify commercial nature-based tourism opportunities in the Sunshine Coast Hinterland in line with consumer demand; and
- conduct pre-feasibility studies for a minimum of two identified nature-based tourism catalyst projects.

The Plan further details nature-based tourism visitor infrastructure needs and access priorities, outlining key actions with agreed implementation responsibilities and timeframes.

1 EC3 Global. 2008 Sunshine Coast Regional Tourism Investment and Infrastructure Plan 2008-2018

A Precinct Approach to Nature-based Tourism

An assessment of the current nature-based tourism experiences on offer in the Hinterland was undertaken as part of the project. The assessment considered core components of nature-based tourism experiences, including places values, infrastructure, tours, visitor services and interpretation.

The assessment suggests that the Sunshine Coast Hinterland has someway to go before being recognised as a strong competitive nature-based tourism destination. Whilst place values and supporting infrastructure within the Hinterland are strengths, the Hinterland it is not yet well-developed in relation to driving major growth in the markets seeking nature-based experiences.

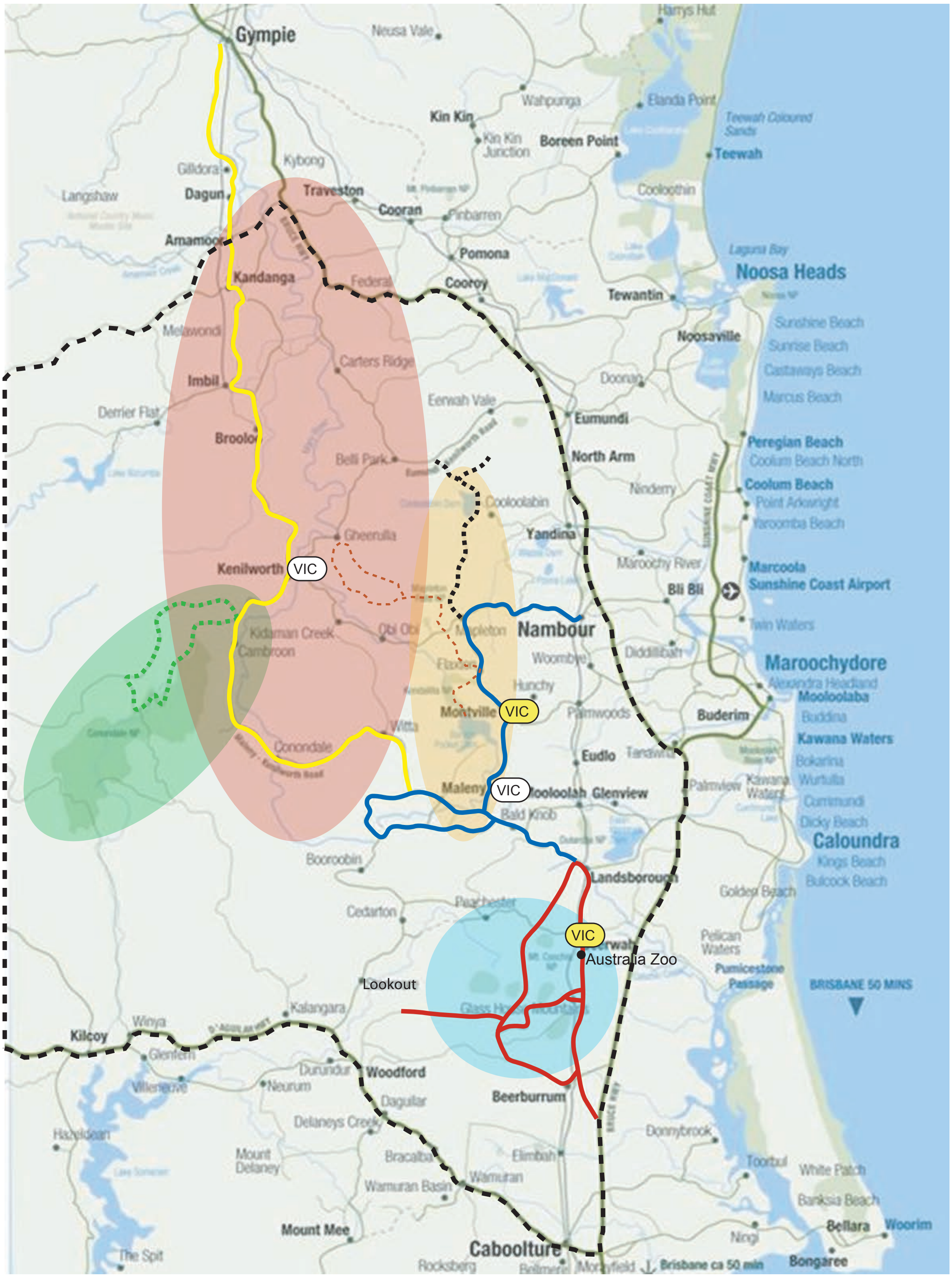
A precinct-based approach has been developed to assist the Sunshine Coast Hinterland achieve clarity around its value proposition and market positioning.

Map 1 introduces the concept of nature-based tourism precincts based on the product audit, market assessment and initial fieldtrip to the Hinterland. It presents the concept of four distinct nature-based tourism precincts within the Hinterland:

- Glass House Mountains Family Adventure Precinct;
- Blackall Range Lifestyle Adventure Precinct;
- Mary Valley Soft Adventure Precinct; and
- Conondale National Park Nature-based Tourism Precinct.

The map also indicates a strong correlation between the precincts and the location of the existing discovery drives and visitor centres.

Seven best prospect nature-based tourism projects have been identified – at least one in each of the nature-based tourism precincts. Table 1 below outlines the selected projects.



Not to scale

Conondale National Park Nature-based Tourism Precinct

Blackall Range Lifestyle Adventure Precinct

Mary Valley Soft Adventure Precinct

Glass House Mountains Family Adventure Precinct

Glass House Mountains Discovery Drive

Kenilworth Forest Drive

Hinterland Discovery Drive incorporating the Blackall Range Tourist Drive

Mapleton Forest Drive

VIC Accreditated Visitor Information Centre

Scenic Country and Mary Valley Discovery

VIC Visitor Information Centre

Approximate Location of the Hinterland Great Walk

Map 3.1. Nature-based Precinct Zones.

Nature –based Tourism Precinct	Selected Best Prospect Project(s)	Rationale for Selection
Glass House Mountains Family Adventure Precinct	• Upgrade of walk experience around the base of Mt Tibrogargan, incorporating • Upgrade of walk experience to the peak of Mt Ngungun	These two walks deliver a rich natural and potentially cultural (indigenous) experience and sweeping views of the Glass House Mountains. These are considered to be the best short walks to capture visitor interest and flow-on from the Glass House Mountains visitor centre.
Blackall Range Lifestyle Adventure Precinct	• Upgrade and development of the Mary Cairncross experience • Zipline attraction at Obi Obi Gorge area • Upgrade of the scenic lookout and cultural interpretative experience at the Mapleton Falls National Park	These three sites all offer high quality but different natural experiences. The projects will require public investment to lift the visitor experience and become a platform for promoting nature-based experiences close to villages in the Hinterland. The development of exciting new commercial product at both Mary Cairncross Reserve and Obi Obi Gorge will provide strong catalysts for the visitor market.
Mary Valley Soft Adventure Precinct	• Integrated recreation trail network for nature-based experiences	The potential for the upgrade and development of a range recreation trails (e.g. mountain bike riding, horse riding, walking, kayaking) well connected to other nature-based experiences. These trails may also link with other existing and proposed trails to create an extensive network to attract visitors and Sunshine Coast residents for day trips and overnight experiences.
Conondale National Park Nature-based Tourism Precinct	• Premium guided walk product on the Conondale Great Walk	The Great Walk and natural features of the Conondale Range National Park offer the prospect for a distinctive premium guided walk of 3 day 2 nights with the capacity to extend and diversify into the future.

Table 1. Summary of the Best Prospect Nature-based Tourism Projects

Implementation of the Plan is to be based around four key strategies under which a range of key recommendations are made:

Strategy 1. Working together by creating supportive frameworks and partnerships:

- Conduct communications to promote the SCH Nature-based Tourism Plan and seek active involvement of stakeholders and buy-in to growing this element of the tourism industry in the Hinterland;
- Provide an enabling policy environment for nature-based tourism development on the Sunshine Coast Hinterland.
- Foster acceptable and preferred partnerships between the public and private sector in the development of nature-based tourism within natural areas;
- Encourage greater levels of collaboration between the local tourism associations in the Sunshine Coast Hinterland
- Encourage the Hinterland tourism industry start building stronger business and promotional relationships with key Sunshine Coast attractions (e.g. Australia Zoo), visitor information centres, and operators in key coastal destinations of Noosa, Maroochydore, Caloundra;
- Provide training programs for the local tourism operators about nature-based tourism including customer service standards, the value-adding of thematic interpretation and bundling of product to create more integrated experiences, tour guiding services etc; and
- Support development of Indigenous tourism products that can be integrated with nature-based tourism experiences and foster training, accreditation, business skills, marketing and interpretation skills to deliver Indigenous experiences.

Strategy 2. Positioning the Hinterland to be a more sustainable nature-based tourism destination:

- Increase and encourage the use of sustainable practices to help limit the impact on the natural environment, climate change and loss of biodiversity;

- Strengthening partnerships between tourism operators and land managers to enhance sustainability and raise awareness of the eco-image of the Hinterland;
- Advocate for adequate resourcing and revenue streams for land managers such as Queensland Parks and Wildlife Service to look after the Hinterland's natural assets
- Support operators to obtain eco-accreditation and implement best practice initiatives; and
- Consider the potential for developing dedicated conservation tourism products in the Hinterland.

Strategy 3. Leading with engaging experiences:

- Develop at least 2 leading commissionable nature-based tourism products within the next 5 years that would attract international and national markets to the Hinterland;
- Invest In the upgrading of visitor experiences and facilities at the selected National Park locations of the Tibrogargan Circuit Walk, Ngungun Summit Walk and Mapleton Falls National Park in line with the concept plans set out in Section 4 of the report and action plan in Section 5.5
- Upgrade the visitor facilities and strengthen the nature-based tourism experience at Mary Cairncross Scenic Reserve in line with the concept plan and pre-feasibility assessment set out in Section 4 of the report and action plan in Section 5.5;
- Progress the proposed Obi Obi Gorge Zipline proposal to seeking expression of investment interest from the tourism sector in line with the concept plan and pre-feasibility assessment set out in Section 4 of the report and action plan in Section 5.5;
- Progress the proposed Conondale Range Wild Walk to seeking expression of investment interest from the tourism sector in line with the concept plan and pre-feasibility assessment set out in Section 4 of the report and action plan in Section 5.5;

- Support the planning, development and management of a network of trails that offer nature-based tourism experiences within the Mary Valley in line with the concept plan and pre-feasibility assessment set out in Section 4 of the report and action plan in Section 5.5. This includes the potential to further develop mountain bike riding and road cycling in the Hinterland in the future;
- Support the realignment of the Hinterland Great Walk (especially between Kondalilla national Park and towards Mapleton Falls National Park) to improve the natural experiences;
- Explore the options to improve public transport links between the Hinterland and coastal towns and within the Hinterland;
- Support the development, promotion and marketing of local food and wine products and the bundling of these products with nature-based tourism experiences in the Hinterland;
- Support events that will help position the Hinterland as a nature-based destination in the minds of the regional community and visitors. e.g. Easter Endurance Ride, Festival of Walks;
- Support industry investment for potential development of more environmentally sustainable accommodation within the Hinterland;
- Support the growth in nature-based tour guided services operating within the Hinterland including access to inherent strengths in walking, botanical, horse riding, mountain bike riding, kayaking, rock climbing, four wheel driving, camping, bird watching and fishing; and
- Encourage tour operator interest in developing a fully integrated one-day high premium experience out of the Sunshine Coast market based around the bundling of exceptional experiences including nature, food and wine, culture, shopping and art/craft.

STRATEGY 4. DELIVERING EFFECTIVE MARKETING:

- Review the brand position of the Sunshine Coast Hinterland with regard to the evolving Queensland Global brand and Sunshine Coast brand. In particular assess the merits of strongly positioning the Hinterland as the 'green and cool' nature-based tourism destination within the Sunshine Coast region;
- Undertake an audit of the relevant State, regional and local marketing materials for the Sunshine Coast Hinterland to support partnership collaboration in the Marketing Plan;
- Ensure nature-based tourism opportunities are featured in any dedicated website for the Sunshine Coast Hinterland and consider the scope for introducing pre-visit tools e.g. podcast downloads;
- The Hinterland tourism industry support marketing and promotional campaigns for the promotion of the Sunshine Coast as a destination for international and domestic visitors, and in particular the nature-based tourism experiences offer within the Hinterland;
- Develop a library of images and film footage for the Sunshine Coast Hinterland that presents its nature-based tourism experiences;
- Prepare a thematic interpretation strategy for the communication of core messages about the Hinterland experience; and
- Undertake further research into the Hinterland visitor market using the segmentation model adopted by Tourism Queensland.

SECTION 1
INTRODUCTION

1.1 THE SUNSHINE COAST HINTERLAND

> *"An alluring blend of inviting beaches, chic coastal hot spots, charming mountain villages and lively seaside towns, the Sunshine Coast is all about stylish relaxation and reconnection. There's a temping range of surf beaches and sheltered bays, championship golf courses and unspoilt national parks. Some of Australia's best restaurants, cafes, and cooking schools make the most of the climate, fresh locally grown produce and views. Don't miss a visit to the world famous Australia Zoo for a chance to interact with Australian wildlife. Explore the national Heritage listed Glass House Mountains and discover the green hills behind the Sunshine Coast, a haven of cosy hide-aways, artists' galleries and rainforest walking tracks."*[2].

The Sunshine Coast is located 100kms to the north of Brisbane and is accessed by rail, air via the domestic airport at Maroochydore and road via the Bruce Highway. As indicated above the Sunshine Coast is well known for its beautiful beaches, warm climate and relaxed lifestyle.

The Sunshine Coast can be divided into two broad sub-regional areas:

- the coastal area which offers access to beautiful beaches and quality resorts, various attractions and the attractive living and visitor destinations of Noosa, Maroochydore, Mooloolaba and Caloundra; and

- the hinterland area which sits inland from the coast and includes several of the above experiential elements - the *charming mountain villages*, *unspoilt national parks, Australia Zoo, Glass House Mountains, the green hills and a haven of cosy hide-aways, artists' galleries and rainforest walking tracks*

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[2] Promotional brochure for the Great Sunshine Way in Southern Queensland

This project is about the Sunshine Coast Hinterland and what needs to be done to strengthen its capacity as a highly desirable destination for the nature-based tourism market[3].

For the purposes of the study, the Sunshine Coast Hinterland is defined by the town of Amamoor in the north, the D'Aguilar Highway in the south, the Bruce Highway in the east, and to the west by the Conondale Ranges (see Map 1.1). The hinterland is characterised by natural assets including lush remnants of sub-tropical rainforest, waterfalls, varied topography offering scenic views, and significant tracts of public protected areas.

1.2 Need for a Nature-based Tourism Plan

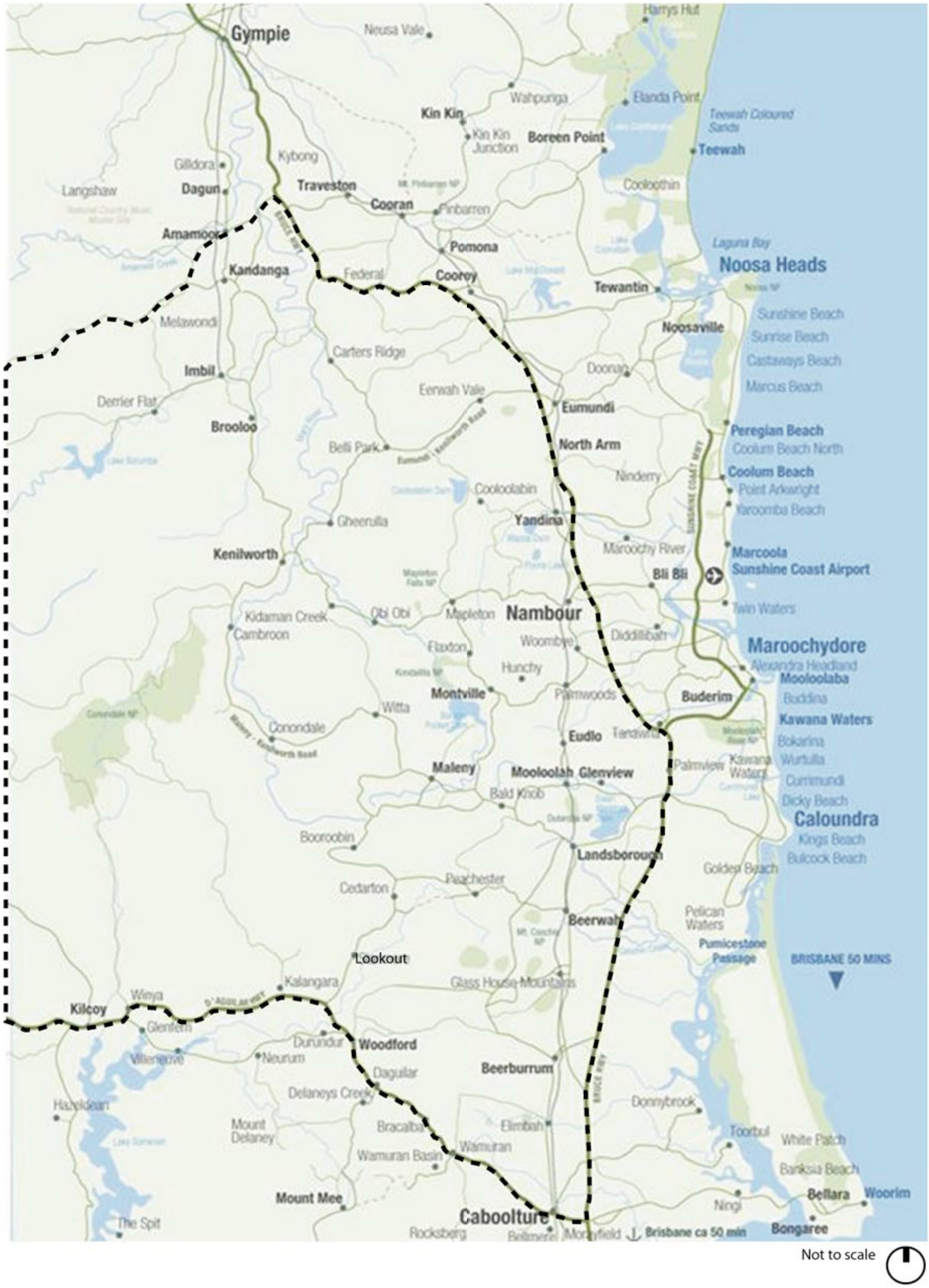
Tourism Queensland and Tourism Sunshine Coast recognise the importance of taking a strategic long-term approach to destination planning, development and management of the nature-based tourism product and experience within the Sunshine Coast Hinterland. The benefits of taking a strategic approach were seen as:

- working with governments, agencies and communities to reduce barriers to growth;
- identifying opportunities for significant competitive improvements in the tourism product and quality of visitor experience;
- increasing the uptake of sustainable practices by the tourism industry; and
- strengthening the competitive position of the Sunshine Coast Hinterland so as to trigger increased visitation stay and yield by those seeking nature-based experiences.

The need for the development of nature-based tourism plan in the Sunshine Coast Hinterland was recommended in the *Draft Regional Tourism Investment and Infrastructure Plan*[4], developed during 2008 as a joint project between Tourism Queensland and Tourism Sunshine Coast. The Plan identified four key potential nature-based catalyst projects of relevance to the Sunshine Coast Hinterland, including:

[3] Nature-based tourism is defined in *Victoria's Nature-based Tourism Strategy 2008-2012* as "tourism that relies on experiences directly related to natural attractions. The five types of identified nature-based tourism are ecotourism, adventure tourism, extractive tourism (e.g. fishing), wildlife tourism and nature retreats"

[4] EC3 Global. 2008 Sunshine Coast Regional Tourism Investment and Infrastructure Plan 2008-2018



Map 1.1. Project Study Area.

the development and expansion of ‘green’ infrastructure including the Sunshine Coast Great Walks;

investigations into the development of high profile nature-based visitor experiences, such as a Sky Walk/Sky Rail System in the Sunshine Coast Hinterland;

investigation into the Sunshine Coast Hinterland’s drive proposition focusing on optimising existing drive routes in the region; and

investigations of the potential development of a Sunshine Coast Hinterland Eco Lodge.

The purpose of the Plan is to investigate the feasibility of these four projects within the context of developing an integrated approach to nature-based tourism development in the Sunshine Coast Hinterland.

The primary objectives of the project are to:

provide a shared, strategic approach to the development of nature-based tourism infrastructure, visitor experiences and access in the Sunshine Coast Hinterland in line with market needs;

determine key nature-based assets both within and outside of protected areas, and identify associated development opportunities;

identify commercial nature-based tourism opportunities in the Sunshine Coast Hinterland in line with consumer demand; and

conduct pre-feasibility studies for a minimum of two identified nature-based tourism catalyst projects.

It will further detail nature-based tourism visitor infrastructure needs and access priorities, outlining key actions with agreed implementation responsibilities and timeframes.

1.3 Approach

Inspiring Place, in conjunction with Horizon 3, were engaged in late 2008 by Tourism Queensland and Tourism Sunshine Coast to prepare the *Sunshine Coast Hinterland Nature-based Tourism Action Plan.*

The project is being undertaken in 8 stages, as shown in Table 1.1.

Stage	Purpose
1 Project Start-up	Establish the structure for the project, laying a solid foundation for what is to come in later stages of the work and the working relationship between the consultant team, Project Leader and the Project Steering Group.
2 Background Research and Market Analysis	Gaining an in-depth understanding of the policy and developmental framework for guiding the project and an informed researched understanding of the potential market for nature-based tourism experiences in the Sunshine Coast Hinterland.
3 Initial Briefing and Site Visit	Fieldtrip and stakeholder consultation to undertake an overview of the existing nature-based tourism assets and products.
4 Preparation of Situational Analysis Report	Integrate the information and results from Stages 1-3 to identify the best prospects for positioning the Sunshine Coast Hinterland as an iconic nature-based tourism destination.
5 Review of Situational Analysis Report	Review the Situational Analysis Report with the Project Steering Group and to seek agreement on the potential pre-feasibility studies to be undertaken for the identified best prospect projects.
6 Pre-feasibility Assessment and Consultation	Undertake fieldtrip and stakeholder consultation to further assess the merits of the selected best prospect nature-based tourism projects.
7 Draft Sunshine Coast Nature-based Tourism Plan and Stakeholder Review	Prepare the draft Sunshine Coast Hinterland Nature-based Tourism Action Plan including the pre-feasibility assessments for review by the Project Steering Group.
8 Final Sunshine Coast Nature-based Tourism Plan	Ensure stakeholder review of the draft Sunshine Coast Hinterland Nature-based Tourism Plan and revision, as may be required to prepare the final Plan.

Table 1.1 Project Approach

SECTION 2
CONTEXT

2.1 Policy Framework

A range of policy and background documents of relevance to assessing nature-based tourism opportunities within the Sunshine Coast Region and the Sunshine Coast Hinterland, have been reviewed. These documents include:

Queensland Tourism Strategy; A 10 Year Vision for Sustainable Tourism, 2006;

The Queensland Brand Portfolio and Brand Sunshine Coast, presentation 2008;

Draft Sunshine Coast Regional Tourism Investment and Infrastructure Plan, 2008-2018;

Sunshine Coast Product Plan, 2009; and

Sunshine Coast Destination Management Plan 2004.

A summary of the main documents is provided below. Market research documents have been reviewed in Section 2.2 of this report.

Queensland Tourism Strategy: A 10-year vision for sustainable tourism

Theme Five is of particular relevance to the development of nature-based tourism in Queensland, as it relates to the 'natural environment and culture'. The Strategy indicates that there will be $3.76 million available to *"strengthen the collaborative relationship between the tourism industry and conservation and protected area managers and facilitate Indigenous involvement in tourism".*

The objectives listed under Theme 5 are:

to facilitate sustainable access to and development of Queensland's natural environment and culture; and

build capacity to achieve sustainable access, development and protection of natural, cultural and heritage attractions.

A summary of the actions listed under Theme 5 of particular relevance to the current project include:

- implement the Tourism in Protected Areas initiative at key tourism sites, including the South-East;
- develop an online Best Practice Sustainable Tourism Package for tourism operators, to aid in reducing their environmental performance, including carbon footprint;
- prepare an online Protected Areas Tourism Operators Handbook, providing guidance on all aspects of conducting commercial operations in Queensland protected areas;
- develop and implement a Parks/Tourism Awareness Program to raise mutual awareness of the demands and obligations faced by park managers and tourism operators;
- prepare and implement an Ecotourism Investment Strategy;
- in consultation with Tourism Queensland and the tourism industry, identify, develop and promote new tourism opportunities building on the current recreation trails and the system of Great Walks;
- Increase Indigenous participation in tourism through the preparation and development of the Queensland Indigenous Tourism Strategy; and
- Tourism in Protected Areas (TIPA) – commercial activity agreements between the operator and the Queensland Parks and Wildlife Service.

The Queensland Brand Portfolio and Brand Sunshine Coast

The Global Brand Strategy is intended to be a framework “to effectively manage Queensland’s portfolio of brands, and their relationship to Brand Queensland in the domestic and international markets”.

The Strategy is intended to:

- ensure continued evolution and investment in the Queensland brand in the global marketplace;
- enable determination of the number and combination of brands that are required to effectively penetrate both domestic and international markets; and
- enable Tourism Queensland to allocate resources according to experiences/product bundles.

The key experiences or ‘essence’ of Queensland’s Global Brand Strategy include ‘natural encounters’, ‘adventures’, ‘islands and beaches’ and “Queensland lifestyle”. The first three encompass nature-based tourism.

Draft Sunshine Coast Regional Tourism Investment and Infrastructure Plan, 2008-2018 (RTIIP)

The Draft Sunshine Coast Regional Tourism Investment and Infrastructure Plan (RTIIP) addresses the potential for the sustainable growth of tourism within the broader Sunshine Coast Region.

This document was also a key driver for the current project, in that it outlined a number of potential tourism development projects specific to the Sunshine Coast Hinterland. These projects included:

1. The development of a Hinterland skywalk or sky rail system, the feasibility of which has been under discussion for a number of years. The Obi Obi Gorge was been nominated as a potential location, and a feasibility study for this site has been prepared by the Blackall Range Business and Tourism Association.

2. Investigation into the development of a specialised Hinterland eco lodge, providing a resort-style, and appealing to both the leisure and nature-base tourism markets. The Plan also indicates that an eco lodge may also be associated with an indigenous experience, guided walks, interpretive facilities and performances and events.

3. Further development opportunities associated with the Great Walks, including development of the Conondale Great Walk (under construction), potential extension of existing Great Walks, development of linkages and transport options to enhance access to the Great Walks, (e.g. shuttle buses through the hinterland area), identification of further infrastructure and promotional opportunities, and integration with other regional recreation, cycling and walking trails.

4. Development of core 'green' infrastructure, including regional tracks and trails (e.g. Maleny to Montville Trail, Glass House Mountains Trail Network, bird watching trails and facilities, mountain bike and horse riding trails), regional recreation development (e.g. recreational opportunities and visitor facilities associated with the Glass House mountains, investigation into 'hands-on' adventure tourism programs, nature-based short course programs, and promotion of adventure experiences such as climbing), and support services such as facilities for the 'grey nomad' markets.

5. Further refinement of the Sunshine Coast Hinterland's drive routes – optimising the existing loops within the region.

SUNSHINE COAST PRODUCT PLAN, 2009

The *Sunshine Coast Product Plan* details specific product development opportunities for the Sunshine Coast Region, and was developed in conjunction with *RTIIP*. The Plan includes analysis of key markets, future tourism profiles, product audit, gap analysis and a range of product development opportunities.

The gap analysis included the need for more markets for hinterland tourism as a key issue, and outlined opportunities such as the development of an 'icon' hotel potentially in the hinterland, lower cost and family hinterland accommodation, wilderness lodges in National Parks, an eco lodge, cycle tourism/cycle trails, more experienced-based/nature-based attractions and activities, tourism scenic routes in the Hinterland, Hinterland walks (potentially skywalk), development of an 'iconic' drive in the Hinterland coupled with links and loops to visitor experiences.

SUNSHINE COAST DESTINATION MANAGEMENT PLAN 2004

This Plan was intended to be a guiding tool for the development of strategies and business plans and as a springboard for further planning and discussion between tourism partners and stakeholders. It was prepared in the context of the Queensland Government services, the Queensland Government Strategy for Growing Tourism and the Tourism Queensland Corporate Plan.

The plan provides an overview of the accommodation, attractions, tours and activities, access and transport, events and festivals, hospitality and retail services, special interest pursuits, tourist information and services, customer services and training and signage within the Hinterland. A number of opportunities were identified for growing tourism, including some related to nature-based tourism market:

- affordable accommodation for the family and backpacker market;
- scope for more walks and to improve access and facilities within the National Parks including signage and interpretation;
- further development of quality attractions based on the products e.g. wine/food, heritage;
- further development of quality, interpretive, educational and entertaining experiences featuring the region's heritage, natural areas, creative industries, and the food and wine industry;
- improving the integration of the transport services that capitalise on the existing transport services;
- improving the coordination and marketing of the events and festivals and introducing new events based around natural attributes e.g. mountain biking;
- opportunities to develop more local products to be sold through markets and local outlets;
- better utilise the natural attractions for interpretative experiences of the local flora and fauna, bird watching and the Aboriginal customs and traditional way of life in the Glass House Mountains area, walking trails, cycling, mountain bike riding and horse riding;

having an accredited professional hinterland gateway information centre with localised information centres; and

improve directional and interpretative signage across the Hinterland.

The Plan sets out a vision to enhance the development and marketing of the Sunshine Coast in partnership with regional tourism organisations, industry, Government and the community. Specifically the key issues for focus were:

- position the Sunshine Coast as a holiday destination that successfully competes in the domestic and international marketplaces;
- ensure sustainable growth and profitability through effective distribution of tourism information, products and services;
- undertake appropriate tourism research, and policy and planning to enhance the visitor experience;
- facilitate effective partnerships and alliances with all stakeholders having an interest in the sustainable development of the Sunshine Coast;
- develop appropriate packages that are fitted to identified consumer needs; and
- enhance the distribution of Sunshine Coast product through the travel trade network.

2.2 Market Trends

A number of market research sources have been reviewed to formulate a broad understanding of the Queensland, Sunshine Coast and Sunshine Coast Hinterland visitor markets. These sources include:

Tourism Australia – Experience Seekers information;

National Visitor Survey;

Domestic Tourism Snapshot 2008;

Queensland - Adventure Market Snapshot 2006;

Queensland – Nature-based Activities Data 2006;

Sunshine Coast Region Domestic Visitor Profile;

International Visitor Profile for the Sunshine Coast;

What are the potential domestic tourism markets for the Sunshine Coast?: Discussion Paper, 2008; and

Hinterland Standard Visitor Surveys.

The following sub-sections provide a brief overview of available market research information about:

nature –based and adventure visitors to Queensland;

visitors to the Sunshine Coast; and

visitors to the Sunshine Coast Hinterland.

2.2.1 Nature-based Visitors to Queensland

DOMESTIC MARKET

Overnight domestic visitation to Queensland, in the year ending September 2008 totalled 16.7 million. Domestic day trippers and international visitors represented a further 28.3 million and 2.1 million. Of the 16.7 million domestic visitors, 11.2 million were intrastate visitors, and 5.5 million were interstate.

Tourism Queensland data for nature-based activities indicates that 14% of domestic visitors to Australia participated in natured-based tourism activities during their trip (10.3 million visitors) – of these, 22% visited Queensland (2.3 million) in comparison to 33% which visited NSW and 21% for Victoria[5].

Domestic nature-based visitation to Queensland has shown an annual average growth rate of 3.8% over the last 4 years, in comparison to 2.8% for NSW, and 1.6% for Victoria. Surveys have found:

a high percentage of Queensland's domestic nature-based visitors are from regional Queensland (29%), with 27% from the Brisbane area, followed by Sydney (13%) and Melbourne (11%);

42% are in the 25-44 year age group, followed by 33% for the 45-64 age group (there has also been significant growth in the 65 and over age group during the last 4 years);

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5 This data is for the year ending December 2006. Nature-based activities relates to tourists who engage in the activities of visiting national parks or state parks, bushwalking or rainforest walks, wildlife watching and/or water based activities (visit the reef, scuba, snorkel) during their visit to a particular state or region.

11% of Queensland's domestic nature-based visitors travelled alone; and

average length of stay for Queensland's domestic nature-based visitors is 6 nights.

Needs-based target market research conducted by Tourism Queensland, identified six distinct consumer groups within the domestic holiday market (refer to Table 2.1), based on ideal holiday experience[6]: The needs-based consumer groups differ from previous market segmentation, in that consumers are grouped according to their holiday needs, motivations and gratifications, rather than age, origin or other demographic characteristic. The appeal of nature and adventure to each of these consumer groups is indicated based on research analysis undertaken by Tourism Queensland. Examples of activities listed for each consumer group are those, which differentiate the segment from other segments, and was mentioned by more than 30% of the consumers within the consumer group.

The research identified three key consumer target groups for the Sunshine Coast region - Social Fun-seekers, Connectors and Unwinders.

The international target markets outlined in the *Sunshine Coast Destination Management Plan* were New Zealand families and couples (key market) and UK (Self Challengers, Comfort Adventurers and Cocoon Travellers), Europe (excluding UK and Germany) – Self Challengers, USA (Travel in Style, Self Challengers), Germany (Self Challengers, Comfort Adventurers and Cocoon Travellers), Singapore/SE Asia – Families and couples as the emerging markets.

[6] Author unknown (2008) From Discussion Paper: *What are the potential domestic tourism markets for the Sunshine Coast?*

Market Segments (% of Australian market)	General Characteristics	Nature and Adventure Appeal
Connectors (32%)	▪ consider holidays as a chance to connect with the people they care most about ▪ will compromise own preferences to ensure everyone has a good time ▪ what's 'real' and what's really important	**More interested in soft nature/adventure experiences** e.g. visiting a natural attraction, watching wildlife in natural setting, visiting waterfalls/gorges, go whale or dolphin watching, visiting wildlife parks, zoos or aquariums
Social Fun-seekers (25%)	▪ the ideal holiday is about having fun ▪ sharing experiences/activities with friends and other holiday makers is important	**More interested in fun adventure activities and will participate in soft nature experiences** e.g. adventure activities (e.g. rock climbing, bungee jumping, caving, sand boarding etc)
Unwinders (15%)	▪ consider holidays to be about relaxation and release, and chance to focus on themselves as an escape from their busy life ▪ unstructured holiday ▪ 'catch their breath', feel calm and peaceful and gain perspective ▪ decisions regarding their holiday are generally made when at their destination	**More interested in soft adventure : adventure not a driver** e.g. watching wildlife in natural setting, visiting waterfalls/gorges, go whale or dolphin watching
Self Discoverers (12%)	▪ consider holidays to be about discovery, nourishment and enrichment of the self (physically and intellectually) ▪ sense of wellbeing	**More interested in cultural aspects of soft nature experience: adventure not a driver** e.g. visit a natural attraction, visit a natural world heritage sites and/or famous unspoilt natural locations
Active Explorers (11%)	▪ pushing boundaries, challenging via physical activity in outdoors ▪ enjoy company of others, but main focus is on exploring the extremes of the physical environment and themselves ▪ 'feeling alive'	**More interested in high energy adventure and immersion into nature; pushing individual boundaries** e.g. 4WD'ing, adventure activities, go bushwalking/hiking/trekking, go camping, go fishing
Stylish Travellers (5%)	▪ consider holidays as a chance to seek out unique and exotic experiences and products ▪ making themselves feel discerning, stylish and successful ▪ seek to demonstrate achievements to themselves and others	**Soft nature unlikely to be a driver unless exclusive; adventure not a driver.**

Table 2.1 Characteristics of Australian Market Segments

INTERNATIONAL MARKET

Tourism Australia has undertaken extensive research to identify the ideal visitor segment for Australia – those visitors who are receptive to the Australian experience. Two research publications by *Tourism Australia – A Uniquely Australian Invitation : The Experience Seeker*, and *Global Experience Seekers* provide some insight into this market.

The identified target market is the Global Experience Seeker. This segment constitutes from 30-50% of all potential long haul outbound travellers from key source markets. They can be found across all ages, income levels and origins but share a common attitude to travel, personal development and everyday life.

Experience Seekers are leaders within their peer groups. They are early adopters of products and services and their value as a market therefore extends to the influence they have on the holiday purchasing behaviour of others.

The key international markets are from the UK, Germany, China and the USA. The 'experience seekers' are most likely to be drawn from:

- young, affluent 25-35 couples who are childless;
- affluent families aged 35-45 with children;
- older affluent couples aged 45-65 years +, whose children that are now independent; and
- visitors that are affluent and seeking 'aspirational' experiences.

Table 2.2 provides a broad profile of the key drivers for the 'experience seeker' market.

	Key Drivers of the Experience Seeker
Emotive	• Balanced lifestyle whilst on holidays • Personal development • To truly engage • Meet the needs of their partners and friends • Immerse with the culture
Functional	• Contrast to everyday life • Learning experience • Opportunity to get involved with environment, people and culture • Insight into their lives
Cultural	• Curious about the world • More complex than other market segments
Economics	• Look for good value • Want destinations to intrude into their awareness • Always looking to save their money and to spend it on the actual experience
Social	• Deeper, more complex • Want personal development • Question the norms • Do not want to be seen as a tourist

Table 2.2 Key Drivers of the Experience Seekers

The 'experience seeker' is looking for products that will deliver authentic personal experiences, self-fulfilment, engagement with the locals, active learning, adventurous, provide variety and contrast with experiences of their day-to-day lives.

Tourism Queensland's nature-based tourism snapshot indicated that New Zealand made up 20% of the total international visitors to Queensland (year end September 2008) undertaking nature-based activities. Other significant international markets were Japan (14%), United Kingdom (12%), USA (8%), and China (7%).

International Adventure Market accounted for 1.8 million international visitors that participated in adventure activities in 2006 (36% of all international visitors to Australia) and that 64% (1.2. million) made a stop-over in Queensland[7]. The surveys identified:

the number of international adventure visitors to Australia increased annually by 13.7% on average between 2004 and 2006;

[7] Source was Tourism Queensland's International Adventure snapshot. Nature-based activities relates to tourists who engage in the activities of visiting national parks or state parks, bushwalking or rainforest walks, wildlife watching and/or water based activities (visit the reef, scuba, snorkel) during their visit not necessarily in a particular state or region.

19% of international adventure visitors to Australia came from the UK, 19% from Japan, 15% from Europe (excludes the UK and Germany), 11% from the USA, and 10% from NZ;

43% were in the 25-44 age group, 28% in the 45-64 age group, and 22% 15-24 age group; and

44% were travelling alone, 30% as an adult couple.

2.2.2 The Sunshine Coast Region Visitor Market

The Sunshine Coast Region[8] attracts 17% of all visitors to Queensland (see Figures 2.1 - 2.2), of these visitors, 90% are domestic. Some of the key findings are that:

the Sunshine Coast represents 22% of all domestic holiday visitors to Queensland;

the holiday market for the Sunshine Coast represents 61% of the total visitor market, whilst visiting friends and relatives makes up 29%;

71% of holiday visitors to the Sunshine Coast are from Queensland, approximately 45% are from within Brisbane; and

the majority of domestic visitors arrive by car, and are holiday visitors from within Queensland, who fit into the 'Connectors' market segment.

[8] Source : Sunshine Coast Region Domestic Visitor Profile

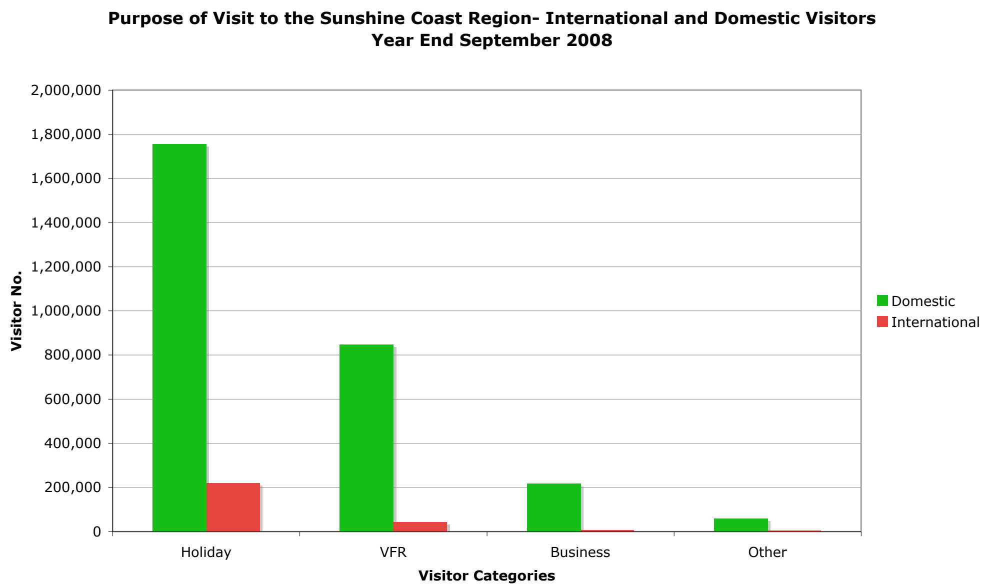


Figure 2.1. Purpose of Visit to the Sunshine Coast Region: International and Domestic Markets

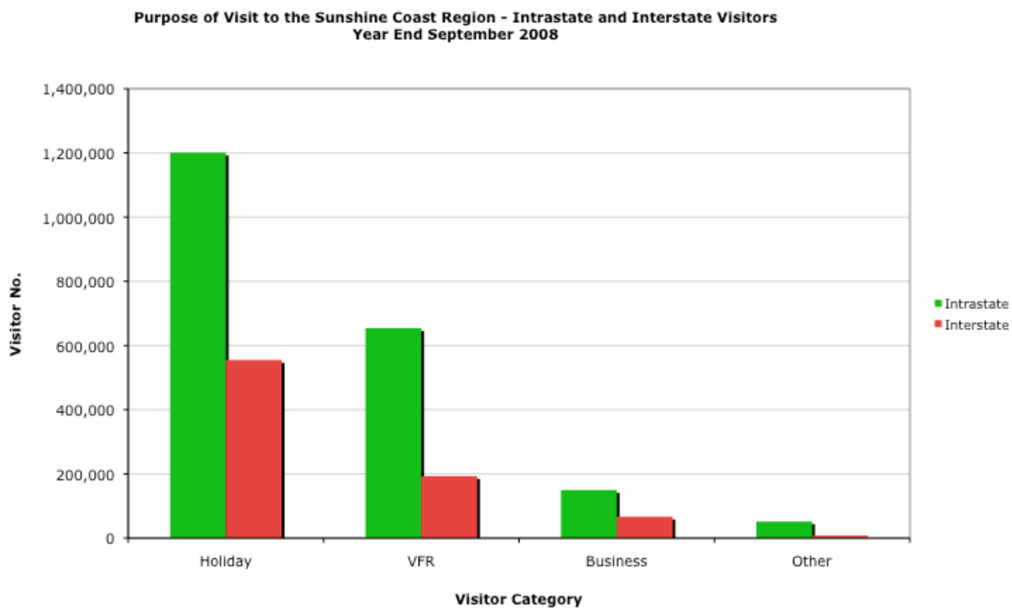


Figure 2.2. Purpose of Visit to the Sunshine Coast Region: Intrastate and Interstate Markets

2.2.3 Sunshine Coast Hinterland Visitor Market

There is very limited visitor data for the Sunshine Coast Hinterland as separate from the Sunshine Coast Region. The needs research identified three key consumer target groups for the Sunshine Coast region - Social Fun-seekers, Connectors and Unwinders, but as indicated above, it is considered that the natural areas within the Sunshine Coast Hinterland may also offer opportunities for the Active Explorer group (e.g. rock climbing on Glass House Mountains, Great Walk).

In September 2008 a *Hinterland Standard Visitor Survey* was conducted with the assistance of the accommodation operators in the Hinterland. Accordingly the following findings should be treated with some care as the survey did not necessarily capture the day tripper market. The survey results of those staying overnight in the Hinterland indicated that:

- The majority of visitors fall into the category of ‘short break visitors’, spending one night (16%) or two (52%) nights in the Hinterland. Short break visitors tend to be residents of Brisbane or southeast Queensland, are high-income ($80,000 - $90,000 plus) couples, travelling without children (75.7%). The largest age group represented was between 24-54 age group.

- The other significant visitor market comprises those visitors who include a visit to the Hinterland as part of an extended holiday around Queensland or more broadly, Australia. This market is more likely to be travelling with children, and is also more likely to source information from more traditional sources (e.g. brochures, guides and word of mouth) in addition to the internet.

- The largest numbers of visitors come from Brisbane and southeast Queensland (see Figure 2.3). The majority of international visitors (see Figure 2.4) are in the 55-64 year age group.

- Many of these visitors have visited the hinterland before (see Figure 2.5), perhaps as day trippers, and used the internet as their primary source of information and trip organisation method.

- Main trip motivators to the Hinterland included “to enjoy peace and quiet of an uncrowded destination”, “to relax and rejuvenate” and “to spend time with my partner”.

- The majority of visitors arrive and travel via personal or rental car whilst in the Hinterland (and wider region).

- The most appealing aspects of the Hinterland were considered to be the “relaxed/peaceful/quiet atmosphere, natural beauty/environment and scenery/views. Many visitors cited the need to limit the commercialisation as one of the most important improvements. Other improvements included more walking trails and better signage.

- The most popular Hinterland destinations were Montville/Hunchy/Flaxton/Mapleton (59%), followed by Maleny/Witta/Conondale/Kenilworth (49%), Eumundi/Yandina (26%) and the Glass House Mountain/Beerwah/Landsborough (including Australia Zoo) (24%).

- Nature-based activities, including going on a walk (57%) and visiting National Parks/State Forests or other reserves (39%) were relatively popular (going to cafes and restaurants were more popular, followed by shopping, which was more popular than visiting National Parks and reserves). Purchasing local gourmet food items, visiting arts and craft galleries and visiting markets were also popular activities.

- Less than 1 in 10 visitors appear to be travelling with children. Of those visitors travelling with children, over one third (38%) are from overseas or interstate.

- The Maleny and Montville areas are particularly popular destinations with in the Hinterland region.

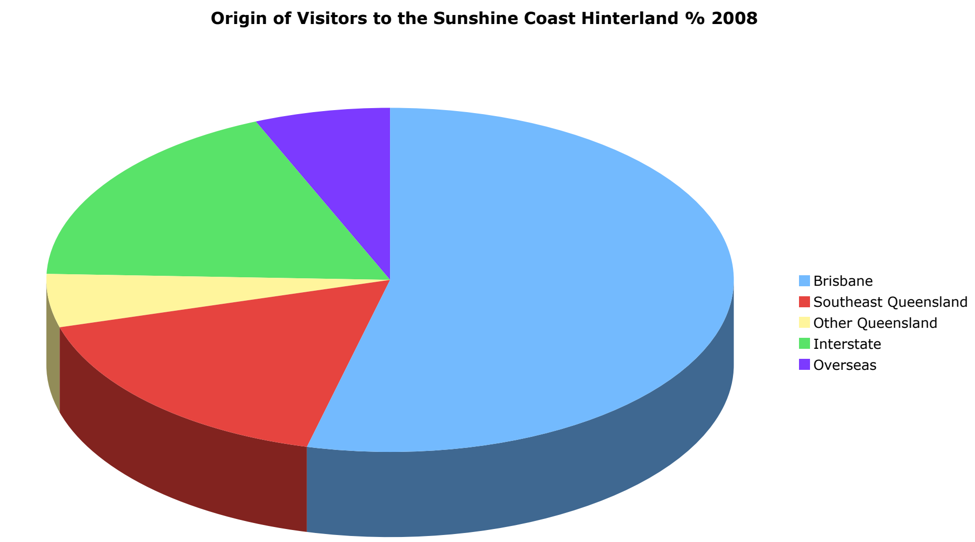


Figure 2.3. Origin of Visitors to the Sunshine Coast Hinterland % 2008

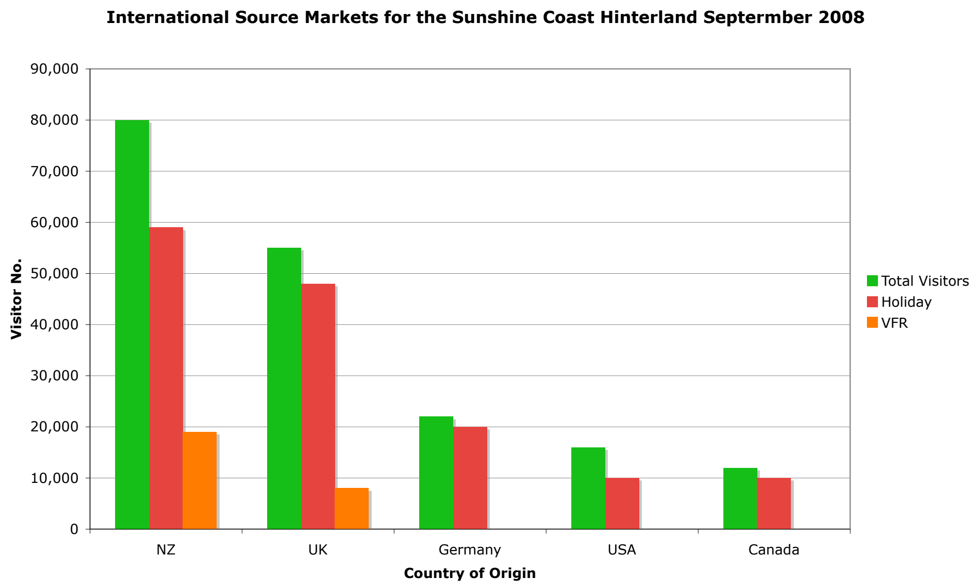


Figure 2.4. International Source Markets for the Sunshine Coast Hinterland: September 2008

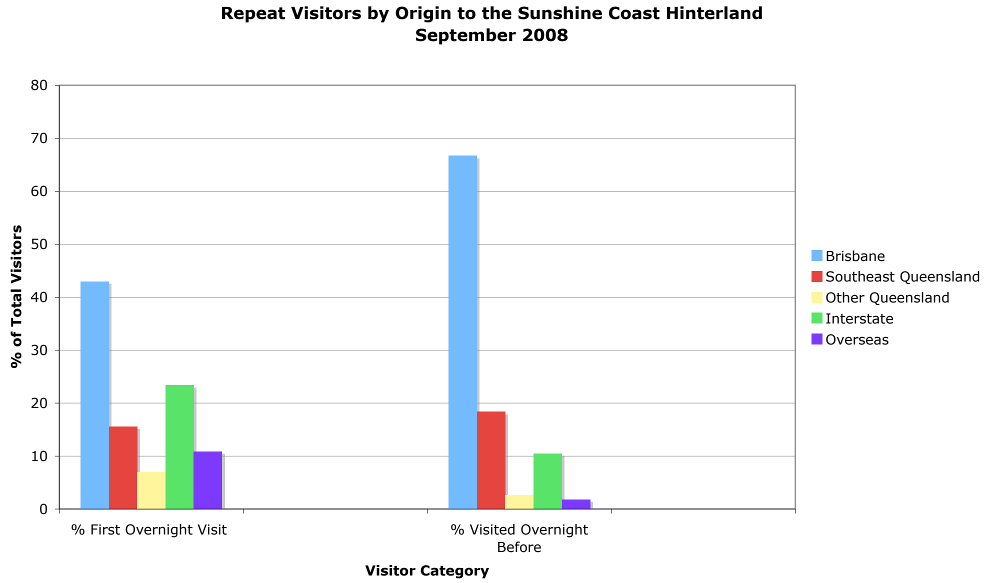


Figure 2.5. Repeat Visitors by Origins to the Sunshine Coast Hinterland: September 2008

2.2.4 Summary

Total visitors to the Sunshine Coast Region are projected to increase from ~2.9 million in 2006, to ~3.4 million in 2012 (2.5%), increasing to 3.6 million by 2017 (1.5%)[9].. The domestic market is expected to increase by 542,000 visitors (average annual increase of 2.2%) whereas the international market is expected to increase by 178,000 visitors (average annual increase of 5.0%). Visitor's nights are expected to grow by about 1.2 million nights for both domestic and international markets with an average annual increase of 1.5% for the domestic market and 3.7% for the international market. However the average length of stay is not expected to increase and may decline for the international market. The Sunshine Coast Region is projected to see a 29% (from 4,490,000 in 2006) increase in day trippers by 2017.

The Sunshine Coast is one of Queensland's largest day trip destinations and this is projected to increase corresponding to future growth as a tourism destination and with the increase in population size.

The domestic market, in particular the intrastate market (e.g. visitors from Queensland and from Brisbane) is a very important market segment for the Sunshine Coast Hinterland. The key consumer target groups for the Sunshine Coast Hinterland are expected to be Social Fun-seekers (interstate) and

9 Visitor projections are drawn from the Sunshine Coast Product Plan 2009

Connectors (intrastate). In assessing the nature and adventure appeal for these target groups, the Sunshine Coast Hinterland is considered to offer:

- good prospects to attract the Connectors with an interest in soft nature and adventure experiences e.g. National Park, waterfalls, doing walks;
- a lack of any stand-out fun adventure activities to attract the Social Fun-seekers although there is some soft nature experiences that may appeal to this group; and
- limited opportunities for the Active Explorer group to get involved in high energy adventure although some potential does exist (e.g. rock climbing on Glass House Mountains, remote parts of the Great Walk).

The experience seeker market is identified as being the core market for Australia attracting increased international visitors, and for the Hinterland to capture this market, there will need to be nature-based products that deliver engaging and immersive experiences with nature. New Zealand, followed by Japan, the UK and Europe appear to be the most important international visitor markets at present, and possibly into the near future for the Sunshine Coast region.

The characteristics of the identified domestic market segments, and those of the Experience Seeker are broadly compatible with nature-based tourism and nature-based tourism visitors.

2.3 Audit of Nature Tourism Based Product

An audit was undertaken of the nature-based tourism product within the Sunshine Coast Hinterland based on web research, site visits, consultations and review of available promotional and marketing material. Attachment 1 lists the identified existing product and indicates:

- the name and location of the natural asset, attraction and tours;
- the land tenure and management responsibility;
- experience being offered; and
- infrastructure/services associated with the product.

The key findings from the audit recognise:

the importance of the National Parks, Forest and other public Reserves and lakes within the Hinterland as the primary natural assets of the Hinterland;

there is a diversity of nature-based and outdoor recreational activities that can be undertaken within these natural areas including walking, sightseeing, climbing/abseiling (mainly at Glass House Mountains), camping, swimming, fishing, water-skiing, canoeing/kayaking, wildlife viewing, four wheel driving (permit generally required off formed roads), horse-riding, mountain bike riding and picnicking;

the significance of the Australia Zoo as the main commercial tourism attraction related to nature within the Hinterland region;

there are a small number of tour services offering nature-based tourism experiences, most of which have an operational base outside of the Hinterland; and

the existing nature-based tours are typically linked to scenic viewing locations within the Hinterland, undertaking short walks, quality food experience and options for wine tasting, shopping and swimming.

The hotels, motels, bed and breakfast places, cottages and caravan/camping grounds found within the Hinterland are important service infrastructure for supporting nature-based tourism but are not nature-based tourism attractions in themselves. However there is an existing range of accommodation choices within the Sunshine Coast Hinterland that make a connection with the inherent nature-based attractions or activities that can be accessed. This is done through:

marketing of the accommodation as a base from which to access the natural assets and in particular the scenic waterfalls, Great Walk, short walks and National Parks;

offering a style of accommodation designed with the natural setting in mind (e.g. tree houses, rainforest setting, tropical forest) as a contrast to the more urban style of accommodation often found elsewhere;

the promotion of relaxation, peace, revitalisation and rejuvenation as part of the escape from city life to the Hinterland;

the alluring names of the accommodation (e.g. Clouds of Montville, Secrets on the Lake, The Narrows Escape); and

the offer of pick-up and drop-off transport services by some operators to facilitate visitors to access sections of the Sunshine Coast Hinterland Great Walk.

SECTION 3
STRATEGIC ASSESSMENT

3.1 SWOT Assessment

Table 3.1 provides a SWOT assessment of the Sunshine Coast Hinterland as a nature-based tourism destination.

There are numerous strengths within the Hinterland that relate strongly to the key findings of the product audit – proximity to key markets, diversity of natural assets, contrast to the more developed coastal areas, and the offer of a range of potential nature-based tourism activities available within the Hinterland. The core strengths suggest the potential for opportunities based around:

positioning the Hinterland as a nature-based destination in contrast to the coastal experiences of the Sunshine Coast region;

capitalising on the cooler climate and lush landscape character of the Hinterland;

strengthening the role of the hinterland as a trail destination (e.g. walks, mountain bike riding, cycling and horse riding);

developing a range of commercial nature-based tourism product associated with the Great Walks;

leveraging more strongly with well-known attractions within the Hinterland, such as Australia Zoo and Glass House Mountains;

fostering greater bundling of product within the Hinterland;

enhancing the appeal of the existing discovery drives; and

identifying, marketing and promoting interpretative messages about the Hinterland to target groups.

The Table indicates that there are also a range of challenges with the existing nature-based product in the Hinterland and that these will need to be addressed to strengthen market awareness, and to position of the Hinterland as a competitive nature-based tourism destination.

The more critical issues are considered to be:

1. Limited 'iconic' natural landscape features.

- Whilst the natural landscape of the Hinterland comprise a diversity of interesting ecological communities and varied topography, including the Glass House Mountains and remnant sub-tropical rainforest, it does not have a striking natural feature comparable to well-known nature-based tourism destinations elsewhere in Australia or Queensland (e.g. Fraser Island, the Daintree), to act as a 'hook' to attract nature-based visitors.

- The strength of established nature-based tourism destinations in Queensland present a high level of competition (including the Gold Coast Hinterland, which has capitalised on its natural landscape and developed a range of adventure and 'eco' products for both guided and independent markets).

2. Realities of an emerging nature-based tourism market.

- The Hinterland is yet to develop as a nature-based tourism destination, with visitation by nature-based visitors currently limited (e.g. independent bushwalking is increasing in popularity in the Hinterland, but currently attracts very limited revenue).

- The current core market is characterised by day visitors, who are primarily interested in relaxation, shopping, food experiences, and general sight seeing, and who see the Hinterland as an 'add on' to a Sunshine Coast experience - the conversion of the current market to better align with nature-based tourism is likely to be difficult, and will most likely be focused around 'softer' nature-based experiences in the shorter-term. The short break visitors see the Hinterland as the destination for their stay.

- Existing tourism product is geared towards the short-break and wedding markets (e.g. range of quality, boutique accommodation), with limited development of nature-based activities, tours or attractions for both the commercial or independent markets.

3. Lack of a leading nature-based tourism product.

- The Hinterland does not currently have a stand out nature-based tourism product or attraction, to provide a catalyst for visitation and lead the way for further product development (for example, the commercial Bay of Fires Walk in Tasmania has acted as a catalyst for the recent popularity of the

Bay of Fires area, voted the worlds ‘hottest’ destination for 2009 by Lonely Planet).

- Natural attractions within the Hinterland are ‘passive’ and generally lack engaging nature-based experiences and interpretation.

4. Limited capacities of the tourism industry.

- The main base of the Hinterland tourism industry are smaller scale accommodation and service providers who have limited capacity to deliver nature-based tourism products and marketing collateral.

- The potential of the Hinterland as a single destination is not being fully exploited with fragmentation of tourism industry into separate associations with limited capacity/resources to engage directly with government and/or overarching regional tourism agencies.

- The limited adoption of environmental best practice standards or a commitment to ecological sustainability in their operations – such a commitment is considered to be strongly aligned with the expectations of nature-based visitors.

5. Policy and resource constraints.

- There are significant policy restrictions relating to the use of public land for commercial nature-based tourism enterprises – barriers to the development of pubic-private partnerships and to group access to National Park land, with potential implications for the viability of commercial nature-based tourism products.

- Limited resources available to land management agencies (QPWS) to maintain and develop nature-based related infrastructure, including trails, public toilets, campsites etc, as a result of limited revenue generation opportunities within National Parks and on other public land.

6. Sensitive natural areas.

- The Hinterland is home to a significant number of rare and threatened flora and fauna species and remnant vegetation communities, with the potential to be adversely impacted upon by nature-based tourism development if not planned and managed appropriately.

- Inappropriate development has the potential to detract from the natural landscape assets of the Hinterland.

STRENGTHS	WEAKNESSES/CHALLENGES	OPPORTUNITIES	THREATS
• Proximity to Brisbane and the broader Sunshine Coast region (access to significant existing domestic and smaller international markets) • Sub-tropical rainforests and other unique vegetation communities • 'Lush', green landscape, contrasting with the coastal environment and drier areas of Australia (appeal to the interstate market) • Well-known plant and animal species of interest (e.g. bunya pine, hoop pine, cedar and fig trees, and bird and mammal species) • Waterfalls and opportunities for fresh water swimming, fishing and other water-based nature-based recreational activities • Cooler climate on average in the Hinterland • Sense of elevation (rolling hills and steep ravines) and scenic views (e.g. to the 'iconic' Glass House Mountains) • Aboriginal cultural heritage connections, including the bunya pine (although not yet developed)	• Limited high profile activity/product base to capture nature-based visitors for multiple days • Lack of high yield commercial nature-based tourism product • Limited 'iconic' landscape or natural features to provide a catalyst for driving strong nature-based visitation and to compete strongly with other destinations • Limited packaging of nature-based tourism products within the hinterland • Perceived 'boundaries' between sub-areas within the hinterland (e.g. lack of coordination/connectivity between the Blackall Range area and the Glass House Mountain area) • No points of difference clearly articulated in the positioning of the nature-based tourism experiences or within different precincts of the Hinterland • Number of promoted drives within the Hinterland but these work in isolation, are not necessarily related to the key access points or provide leading experiences related to nature-based experiences	• Position the Hinterland as a nature-based destination in contrast to the coastal experiences of the Sunshine Coast region • Capitalise on the cooler climate and lush landscape characteristics (as a break from the droughts and drier conditions elsewhere) • Strengthen the role of the hinterland as a trail destination (e.g. the Festival of Walks), particularly focused on short walks, mountain bike riding and horse riding • Development of commercial nature-based tourism product associated with the Great Walks (e.g. guided walking) • Leveraging better with well-known attractions within the hinterland, such as Australia Zoo and Glass House Mountains • Greater bundling of product within the Hinterland • Enhance the appeal of the existing discovery drives • Identify, market and promote interpretative messages about the Hinterland to target groups	• Competition from existing from well-developed nature-based tourism destinations in Queensland (e.g. the Daintree, Gold Coast Hinterland) and elsewhere • Adverse or unsustainable developments that may change the quality of experiences or affect the perception of the Hinterland as a nature-based destination • Lack of sufficient resources to manage, maintain and upgrade infrastructure and natural areas consistent with expectations of nature-based tourism market • Risk that some product promoted as nature-based tourism experiences fail to deliver on authenticity, customer expectations and services • Lack of sufficient investment interest in developing nature-based tourism product in the Hinterland • Parochial interests prevail rather than having creative and supportive partnerships within the Hinterland and with the tourism industry outside

Table 3.1 : SWOT Assessment of the Sunshine Coast Hinterland as a Nature-based Tourism Destination (Continued)

STRENGTHS (continued)	WEAKNESSES/CHALLENGES (continued)	OPPORTUNITIES (continued)	THREATS
• Supporting infrastructure/services including retail, dining, cafes, visitor information centres etc • The Sunshine Coast Hinterland Great Walk • The Conondale Great Walk (under construction) • Range of other walking trails and lookouts • Camping facilities • Opportunities for other trail activities including horse riding and mountain biking (currently undeveloped) • Significant number of National Parks and other public reserve areas • Well-known attractions and destinations (e.g. Australia Zoo and the Glass House Mountains) • Existing collateral, including QPWS maps and brochures, Great Walks marketing material (topographic map)	• The Sunshine Coast Hinterland Great Walk is not likely to be recognised as an iconic walk in comparison with other 'great' walk experiences in Australia e.g. Great Ocean Walk, Cradle Mountain Walk, Bay of Fires Walk. • Limited integrated transport between coast and the Hinterland	• Programming of events supporting nature-based tourism experiences • Eco-accreditation / best environmental practice – fit with nature-based tourism and target markets	See above.

Table 3.1 : SWOT Assessment of the Sunshine Coast Hinterland as a Nature-based Tourism Destination (Continued)

3.2 Strategic Assessment of the Hinterland Nature-based Tourism Experience

3.2.1 Bridging the Gaps

The focus of this report is to realise the nature-based tourism potential of the Hinterland with the existing visitor market of the region as a first step the to support its potential to develop as a more significant nature-based tourism destination in the longer term.

Table 3.2 below shows an overall assessment of the current offer of nature-based tourism experiences within the Hinterland in relation to the core experience components of:

- place values;
- infrastructure;
- tours and services; and
- interpretation.

The assessment suggests that the Sunshine Coast Hinterland has someway to go before being recognised as a strong competitive nature-based tourism destination. Whilst place values and supporting infrastructure within the Hinterland are strengths, the Hinterland it is not yet well-developed in relation to driving major growth in the markets seeking nature-based experiences.

Currently the Hinterland does not have the product/services to make a major shift/gain into the nature-based tourism market beyond doing business as usual in an incremental way, and tied to the destination and the regional campaigns. There will need to be upgrading of the infrastructure and growth in tour offerings, services and interpretation of the Sunshine Coast Hinterland to achieve greater awareness of its nature-based assets. Table 3.2 suggests that there is a need to intervene to bring about a bridging of the gaps so as to achieve a desirable nature-based destination. Critical to this process, will be the integration of the position of the Sunshine Coast Hinterland with the evolving global brand for Queensland and the Sunshine Coast Region brand.

EXISTING NATURE-BASED TOURISM EXPERIENCE	BRIDGING THE GAP	DESIRED NATURE-BASED TOURISM EXPERIENCE
INTERPRETATION Limited interpretation, including information signage relating to the Sunshine Coast Hinterland Great Walk at a number of locations, plant identification labels, and Aboriginal names for local landscape features. Generally disjointed across the Hinterland and varying in style, content and messages. Opportunity to add interpretative messages to visitor centres. Limited nature-based information to trigger visits.	***BRAND*** Strong integration between the Queensland Global Brand, Sunshine Coast Brand and Sunshine Coast Hinterland Brand	***INTERPRETATION*** There are clear and agreed messages about the presentation and interpretation of the Sunshine Coast Hinterland destination that are delivered through a range of different media and targeted to different core market segments. Recognition that thematic interpretation allows the visitors to engage with the local community, learn about the natural and cultural values and provide a contrast with their daily life experiences.
TOURS and ACTIVITTIES Australia Zoo, Sunshine Coast Off Beat Rainforest Tours, Mystic Mountain Tours, Montville Hinterland and Rainforest Tour, Mary Valley Adventure Trails (guided horse riding tours), Terry's Gympie Regional Tours, Great Walk transfers offered by a limited number of private accommodation providers. Lack of well-presented journeys (guided and self-guided). Varying level of customer services.		***TOURS and ACTIVITIES*** Increase the choice and price-point for a range of transport and guided tour services that will allow increased visitors to access and enjoy nature-based tourism experiences. Improvements to the infrastructure that will add value to the tour services and bundling of products within the Hinterland.
INFRASTRUCTURE Range of quality walking trails, Sunshine Coast Hinterland Great Walk, Conondale Great Walk (under construction), basic day use infrastructure available within National Parks and other reserves, camping and caravan facilities in or within close proximity to National Parks and other reserves (affordable), existing accommodation, dining, retail and other supporting services and infrastructure, four promoted tourist drives (Glass House Mountains Discovery, Hinterland Discovery, Blackall Range Tourist Drive and Scenic Country / Mary Valley Discovery).		***INFRASTRUCTURE*** The quality of the nature-based tourism experience is enhanced through the existing infrastructure and the potential development of 'leading' nature-based products and 'value-adding' components that will extend the appreciation of the nature-based experiences, e.g. ecolodge accommodation, commercial walk products, innovative development and sustainable management and trails, inspiring lookouts, directional and informative signage etc.
PLACE Sub-tropical rainforest, 'lush'/green landscape, rolling hills, elevation, scenic vistas, water falls, the Glass House Mountains, rare and threatened flora and fauna, significant amount of public reserved land, strong cultural associations with the local Aboriginal people - the Gabbi Gabbi (e.g. the bunya pine), generally cooler climate along the ranges than that of the coast, high rainfall.		***PLACE*** The distinctive place values of the Sunshine Coast Hinterland are sustainably managed, marketed and promoted to under-pin the Hinterland as a destination for engaging nature-based tourism experiences. The different nature-based experiences within precincts of the Hinterland are evident.

Table 3.2 Bridging The Gap - Existing and Desired Nature Based Tourism Experiences

3.2.2 Nature-based Tourism Precincts

A precinct-based approach would assist the Sunshine Coast Hinterland to achieve clarity around its value proposition and market positioning.

Map 3.1 introduces the concept of nature-based tourism precincts based on the product audit, market assessment and initial fieldtrip to the Hinterland. It presents the concept of four distinct nature-based tourism precincts within the Hinterland:

Glass House Mountains Family Adventure Precinct;

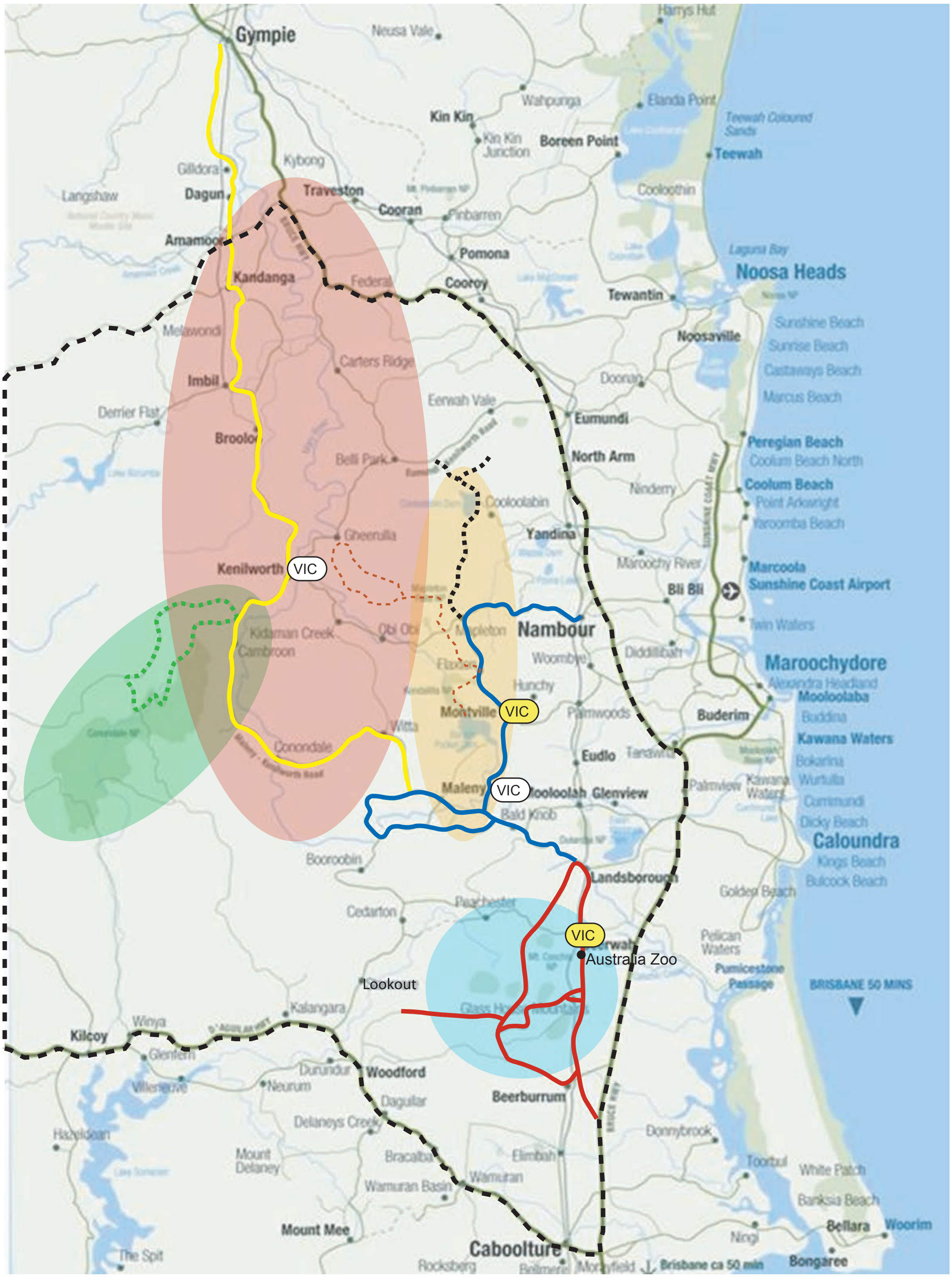
Blackall Range Lifestyle Adventure Precinct;

Mary Valley Soft Adventure Precinct; and

Conondale National Park Nature-based Tourism Precinct.

The map also indicates a strong correlation between the precincts and the location of the existing discovery drives and visitor centres.

Table 3.2 illustrates how taking a precinct approach will assist in drawing out the key markets, themes and core experiences for each nature-based tourism precinct therefore enabling the industry to promote more effectively the distinctiveness of the Hinterland.



Not to scale

Conondale National Park Nature-based Tourism Precinct

Blackall Range Lifestyle Adventure Precinct

Mary Valley Soft Adventure Precinct

Glass House Mountains Family Adventure Precinct

Glass House Mountains Discovery Drive

Kenilworth Forest Drive

Hinterland Discovery Drive incorporating the Blackall Range Tourist Drive

Mapleton Forest Drive

Scenic Country and Mary Valley Discovery

VIC Accreditated Visitor Information Centre

VIC Visitor Information Centre

Approximate Location of the Hinterland Great Walk

Map 3.1. Nature-based Precinct Zones.

Precinct Name	Key Theme(s)	Potential Core Nature-based Experience(s)
Glass House Mountains Family Adventure Precinct	Family based activities Adventure Nature	▪ Existing lookout & interpretation (early explorers, indigenous activity, geology) ▪ Upgrading the experiential qualities and interpretation of the circuit walk around the base of Mount Tibrogargan and possibly strongly aligned with indigenous place values and stories ▪ Upgrade the Mt Ngungun walk with spectacular views of the other Glasshouse Mountains ▪ Rock climbing & abseiling – including passive observing ▪ Building stronger partnerships with the Australia Zoo as a launch-pad to Hinterland nature-based experiences ▪ Interpretation and information at the Glass House Mountains Visitor Centre ▪ Develop stronger focal point for visitors ▪ Enhancement of the Glass House Mountains Discovery Drive
Blackall Range Lifestyle Adventure Precinct	Fun Lifestyle Nature	▪ Bundling of the existing product offering within the townships of Maleny, Montville and Mapleton ▪ Art, craft and alternative medicine/recovery linked to nature ▪ Identify new fun adventure attraction within natural setting of the Blackall Range ▪ The Sunshine Coast Hinterland Great Walk – potential for expanding the walk on-off product using existing accommodation and services ▪ Celebrate the scenic and waterfall views with innovative lookouts, trails and interpretation e.g. Mapleton Falls ▪ Strengthen the sub-tropical rainforest experiences at selected locations including Kondallila & Mapleton Falls, Mary Cairncross Reserve, Lake Baroon, Obi Obi Gorge ▪ Facilitate greater awareness of nature-based tourism opportunities in the wider Hinterland ▪ Greater commitment to environmental best practice in accommodation, tours and services
Mary Valley Soft Adventure Precinct	Lifestyle (food & wine) Soft adventure Being active in nature	▪ Food bowl/farm gate experiences linked to nature ▪ Possible new trail and nature based activity focus to attract greater recreational use and interest including soft adventure tourism (e.g. mountain biking, horse riding, kayaking) ▪ Mary Valley Rattler Steam Train heritage railway experience connected to nature-based tourism and themes
Conondale National Park Nature-based Tourism Precinct	Pure nature Adventure “Wild, clean & green”	▪ Completion of the Conondale Great Walk, including short walk options ▪ Potential for a premium walking product associated with the Conondale Great Walk ▪ Potential for distinctive eco-lodge linked to outdoor activities accessed from within the area surrounding the National Park ▪ Soft adventure tourism (e.g. camping, fishing, four wheel driving, walking) ▪ Mountain biking in the Forest Reserve areas and on access roads within the National Park ▪ Bird watching and nature study tour options ▪ Kenilworth as a service centre

Table 3.2 Proposed Nature-based Tourism Precincts in the Hinterland

3.3 Vision

The vision is for the Sunshine Coast Hinterland to be developed and recognised as a high quality competitive nature-based tourism destination within Australia in the next 10 years. The vision statement is:

The Sunshine Coast Hinterland will be the place where visitors connect with nature through engaging and inspiring experiences that are sustainable and deliver a vibrant tourism industry.

The achievement of the vision is considered to be a step process. The first step is to realise that nature-based tourism potential of the Hinterland with the existing visitor market of the region. The second step is to develop the product and experiences that will position the Hinterland as a stronger nature-based tourism destination to sustain a vibrant tourism industry.

This will not happen without intervention and an agreed commitment to bridging the identified gaps in the delivery of nature-based tourism experiences within the Hinterland. A long-term approach is required to improve knowledge within the industry, develop the 'core' nature-based tourism product and experiences that will position the Hinterland as a competitive destination.

Fundamental to this vision will be the need to:

integrate the brand position for the Hinterland with the global brand for Queensland and the Sunshine Coast Region brand;

promote public investment that will upgrade the existing infrastructure and facilities, especially within the Hinterland's National Parks and Forest Reserves, so as to create enticing experiences with a stronger engagement of nature and act as a catalyst for encouraging appropriate private sector product development and investment;

foster private investment that will help identify, plan, develop and manage several 'hero' products that will differentiate the Sunshine Coast Hinterland from other visitor destinations based on its inherent distinctive qualities;

build more supportive frameworks and partnerships that will attract nature-based tourism investment and maintain the integrity of the natural environment;

facilitate adoption of more sustainable practices within the industry to support market recognition and growth in nature-based tourism;

improve the quality of customer services to match expectations as a nature-based tourism destination;

develop and support regional campaigns that give focus to the developing nature-based tourism experiences within the Hinterland; and

increase tourism yield rather than rely on an increase in tourism numbers.

3.4 Potential Best Prospects for Leading Nature Based Tourism Experiences

As indicated previously, one of the key outputs of the *Sunshine Coast Hinterland Nature-based Tourism Action Plan* is to identify a minimum of two potential nature-based tourism products for pre-feasibility assessment.

There is currently no ‘hero’ or ‘flagship’ nature-based tourism product that has the capability of triggering a strong market position and customer recognition of nature-based tourism experiences within the Sunshine Coast Hinterland. Australia Zoo and the Glass House Mountains National Park are major visitor attractions but there is limited flow-on travel, and therefore revenue, further into the Hinterland as a result of these attractions being located at the southern edge of the Sunshine Coast Hinterland.

Development of nature-based ‘triggers’ would improve recognition of the Hinterland. High profile leading product, would encourage conversion of the key market segments, and drive a brand edge to position the Hinterland as highly desirable destination. Over time, these products can be a catalyst to evolving other new nature-based tourism products that offer a mix of experiences with appeal across the market segments.

The *Sunshine Coast Regional Tourism Investment & Infrastructure Plan (RTIIP) 2008 – 2018* identified ten catalyst projects for the Sunshine Coast region that may be accelerated by in-principle and actual Government support. These broad opportunities were considered during the initial consultation and site visits, but did not emerge as being the best prospects for under-pinning major nature-based tourism developments in the Sunshine Coast Hinterland. A summary of the assessment for each project is provided in Attachment 2.

Based on the research, fieldwork, stakeholder consultations and discussions with the Project Steering Committee the following projects were identified as being the best prospect for further investigation with the capacity to better reflect market demand and precinct opportunities (Table 3.3):

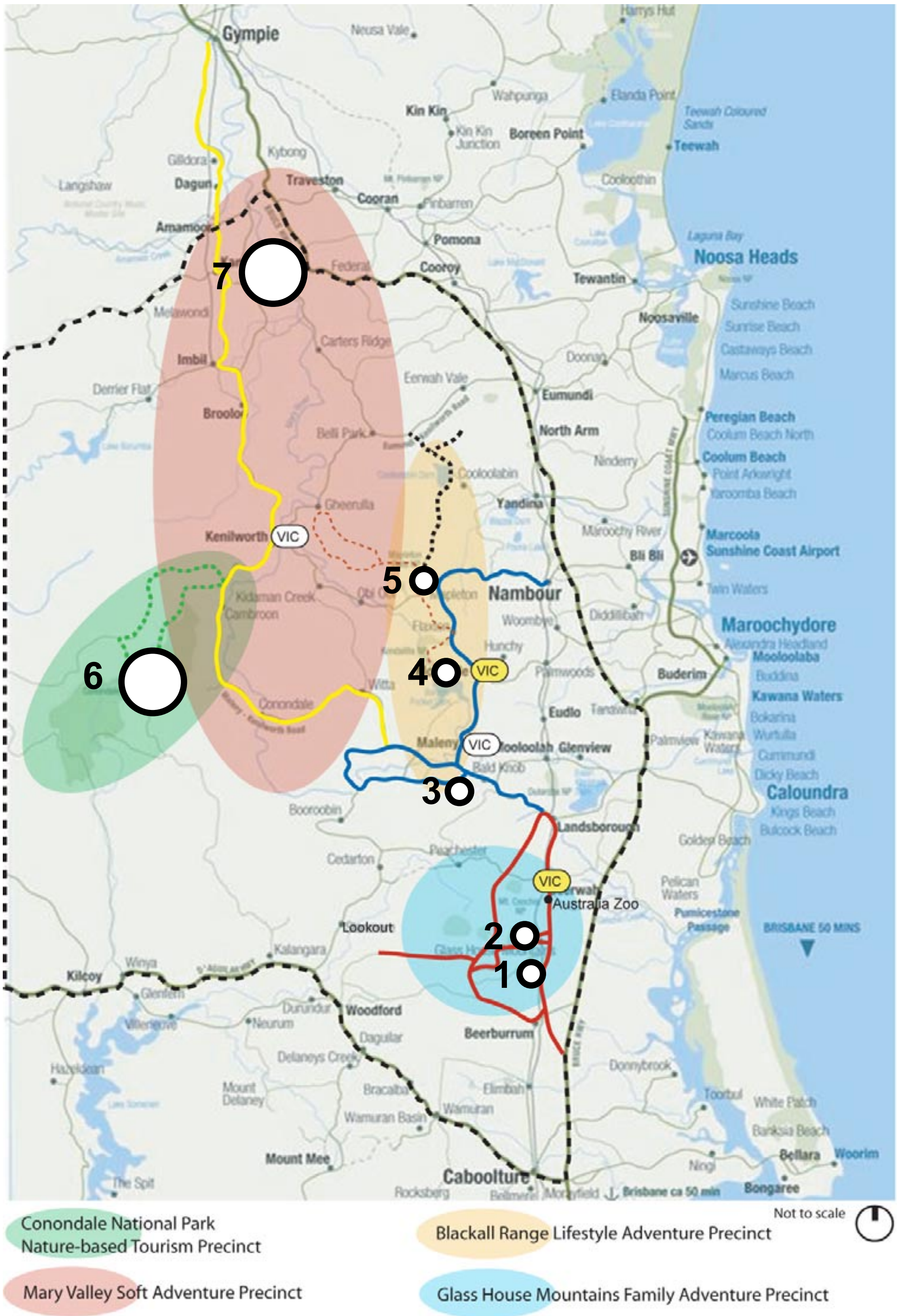
Nature –based Tourism Precinct	Selected Best Prospect Project(s)	Rationale for Selection
Glass House Mountains Family Adventure Precinct	▪ Upgrade of walk experience around the base of Mt Tibrogargan ▪ Upgrade of walk experience to the peak of Mt Ngungun	These two walks deliver a rich natural and potentially cultural (indigenous) experience and sweeping views of the Glass House Mountains. These are considered to be the best short walks to capture visitor interest and flow-on from the Glass House Mountains visitor centre.
Blackall Range Lifestyle Adventure Precinct	▪ Upgrade and development of the Mary Cairncross experience ▪ Zipline attraction at Obi Obi Gorge area ▪ Upgrade of the scenic lookout and cultural interpretative experience at the Mapleton Falls National Park	These three sites all offer high quality but different natural experiences. The projects will require public investment to lift the visitor experience and become a platform for promoting nature-based experiences close to villages in the Hinterland. The development of exciting new commercial product at both Mary Cairncross Reserve and Obi Obi Gorge will provide strong catalysts for the visitor market. Whilst proposed plans for the Maleny District Sport and Recreation Club to develop a Maleny Sporting precinct are beyond the scope of consideration for the Sunshine coast *Hinterland Nature-based Tourism Plan*, there are potential synergies between the plans. If the development proposed for Maleny proceeds it will assist to retain the rural and natural character of Maleny. This focus on retaining the natural setting, particularly the riverine ecosystem, has clear benefits for nature-based tourism in the area and is complimentary to the intention of the Sunshine Coast Hinterland Nature-based Tourism Plan. In addition, there may be potential for visitors to the sporting precinct to 'value-add' to their Hinterland experience by participating in nature-based tourism activities.

Table 3.3 Selected Best Prospect Projects for the Hinterland

Nature –based Tourism Precinct	Selected Best Prospect Project(s)	Rationale for Selection
Mary Valley Soft Adventure Precinct	Integrated recreation trail network for nature-based experiences	The potential for development of a range of trails (e.g. mountain bike riding, horse riding, walking, kayaking) that could be well-linked with nature-based experiences. These trails may also link with other existing and proposed trails to create an extensive network to attract visitors and Sunshine Coast residents.
Conondale National Park Nature-based Tourism Precinct	Premium walk product on the Great Walk	The Great Walk and natural features of the Conondale Range National Park offer the prospect for a distinctive premium walk of 3 day 2 nights with the capacity to extend and diversify the walk product in the future.

Table 3.3 Selected Best Prospect Projects for the Hinterland

The location of the best prospect projects in relation to the nature-based tourism precincts for the Sunshine Coast Hinterland is shown in Map 3.2.



Locations for Nature Based Tourism Projects

1. Mt Tibrogargan Circuit Walk
2. Mt Ngungun Summit Walk
3. Mary Cairncross Scenic Reserve
4. Obi Obi Gorge Zipline
5. Mapleton Falls National Park
6. Conondale National Range Wild Walk
7. Mary Valley Nature Based Experiences

Map 3.2 - Location Plan

SECTION 4
ASSESSMENT OF THE BEST NATURE-BASED TOURISM PROSPECTS

4.1 Glass House Mountains Family Adventure Precinct

The Glass House Mountains are distinctive volcanic plugs that rise abruptly from the coastal plain, located within 1 hour's drive of Brisbane. They were given the name of glass houses' by Lieutenant James Cook in 1770, due to their similarity in appearance to glass kilns in his homeland.

The National Park consists of four separate parcels on land containing the seven mountains –Mt Beerwah, Mt Coonowrin, Mt Ngungun, Mt Cooee, Mt Tibrogargan, Mt Tibberoowucccum and Mt Beerburrum. A number of other, volcanic plugs exist on nearby private land but are not as prominent landscape features as those within the National Park. All the mountains are located less than 10km of the new Glass House Mountains visitor centre built at Beerwah.

The mountain names relate to the strong Aboriginal spiritual association with the Glass House Mountains landscape. The Aboriginal legend of the Glass House Mountains is currently being told through visitors picking up a low cost information sheet from visitor centres. There is an opportunity to add further infrastructure and/or visitor experiences about the Precinct that will help visitors to better engage with the landscape and orientation at the visitor centre.

Site visits and discussions with Queensland Parks and Wildlife Service (QPWS) indicated that the best two walks within the Glass House Mountains that were potentially sustainable as high quality walk experiences were the Tibrogargan Circuit Walk and Ngungun Summit Walk. Past survey work by QPWS indicated that the lookout attracted 75,000-80,000 visitors in 2008 whereas the summit walks to Mt Tibrogargan and Mt Ngungun attracted around 13,000 visitors during the year.

The location of the two selected walks in shown in Figure 4.1.

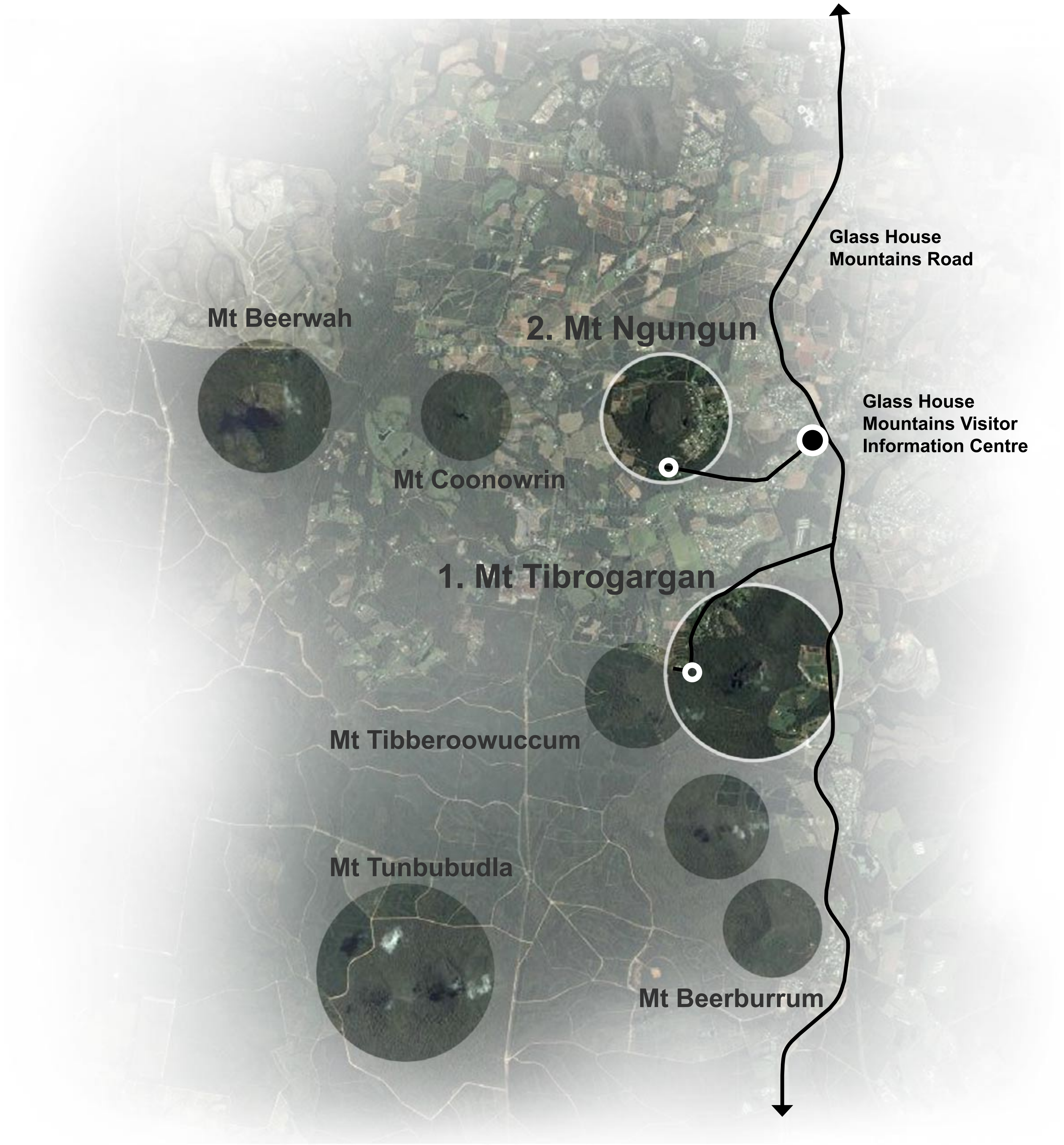


Figure 4.1 - Glass House Mountains - Location plan

4.1.1 Tibrogargan Circuit Walk

The Tibrogargan Circuit Walk is a 3.3 km walk around the base of Mt Tibrogargan and was initially constructed to help reduce the environmental impacts and risk management issues involved with visitors on the steep summit walk.

The track is well-constructed and provides excellent views to Mt Tibrogargan and other Glass House Mountains. It has an easy grade and provides a walk of 1-1.5 hours duration. It is also linked to the Trachyte Circuit, managed by the Department of Natural Resources and Mines, and offers visitors the option of undertaking a longer walk.

Figure 4.2 shows photographs of the walk and existing facilities.

The opportunity exists to enhance the walk experience so as to attract greater numbers of visitors to undertake this walk as part of their Glass House Mountains visit. The existing track offers an attractive walk but the inclusion of interpretation would add considerable value to the visitor experience.

A concept plan has been prepared for the walk. The key features of the plan are:

- Improve directional signage to the Tibrogargan Circuit Walk for visitors from the Glass House Mountains visitor centre and along Barrs Road.

- Promote the overflow car parking area and connecting track located to the west of the car park area.

- Improve the arrival experience and orientation to the Tibrogargan Circuit Walk by relocating the track signage and the information panel to be positioned at the entry point to the track.

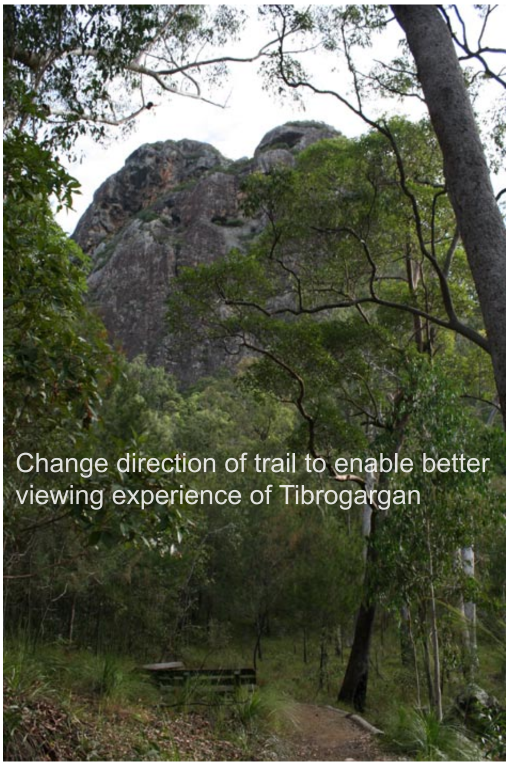
- Encourage visitors to walk the circuit in an anti-clockwise way (currently visitors are enticed to walk clockwise) so as to better view and appreciate some of the exposed mountain faces seen from the track.

Existing car park

Existing day use area

Existing viewing platform

Seating / viewing node



Existing interpretation node

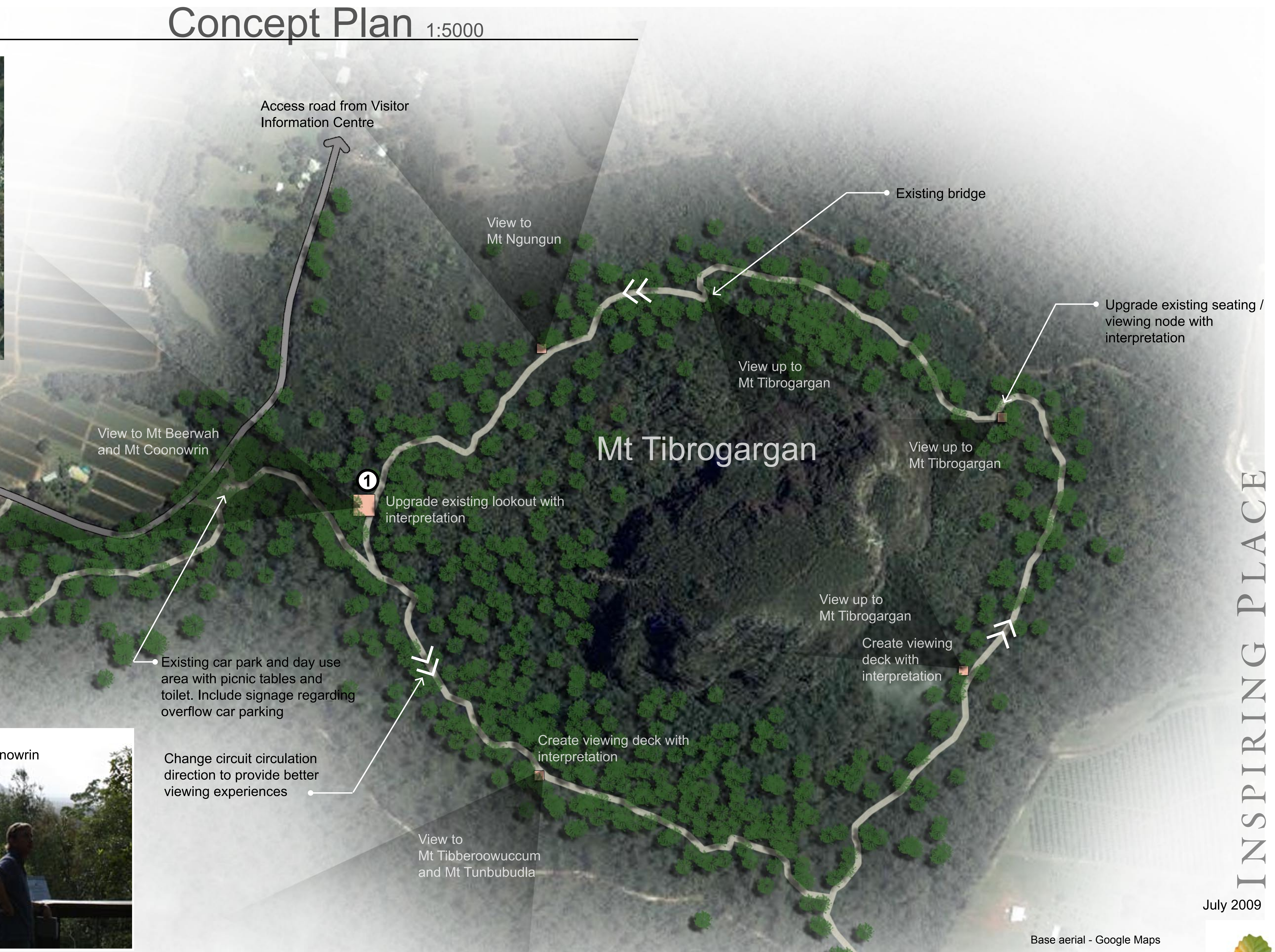
Existing prefabricated gravity steps

Figure 4.2 - Tibrogargan Circuit Walk

Context

Base aerial - Google Maps

Concept Plan 1:5000



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Base aerial - Google Maps

1. Tibrogargan Circuit Walk

North

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Create a number of possible interpretation nodes around the circuit including:

utilising two existing sites where there is a lookout deck (western side of circuit near entry point) and seating arrangement (north eastern side with view to Mt Tibrogargan);

creating three new locations for viewing the Glass House Mountains incorporating interpretation;

Making the existing lookout site the telling of the Aboriginal legend, which would be enhanced by the walk experience and initial familiarisation of some of the mountains referred in the story.

An interpretation plan should be prepared to identify the themes that could under-pin the Tibrogargan Circuit Walk experience. It would be necessary to discuss and prepare the plan in conjunction with the local Aboriginal community (Gubbi Gubbi) , as the interpretation themes should primarily reflect their cultural values and interpretation of the significance of the landscape. The interpretation should identify a media matrix to present the themes using a variety of techniques, not just information signs.

In the longer term, it is envisaged that the walk could offer potential for an Aboriginal guiding service to lead visitors on the walk. This could be booked as an experience product through the Glass House Mountains visitor centre or in advance through normal booking systems.

A preliminary cost estimate for the proposed works is provided in Attachment 3.

4.1.2 Ngungun Summit Walk

Mt Ngungun is located some 3 kms to the west of the Glass House Mountains visitor centre. The Summit Walk is a 700m walk that offers exceptional views of the whole of the Glass House Mountains area. The lower section of the walk has been upgraded by QPWS but there are some steep eroded sections required to reach the summit.

The Summit Walk is considered to be potentially the most sustainable to promote for visitors seeking to climb one of the Glass House Mountains. QPWS are facing major environmental problems with many of the other summit walks, and closure of some summit walks has occurred for public safety and risk concerns.

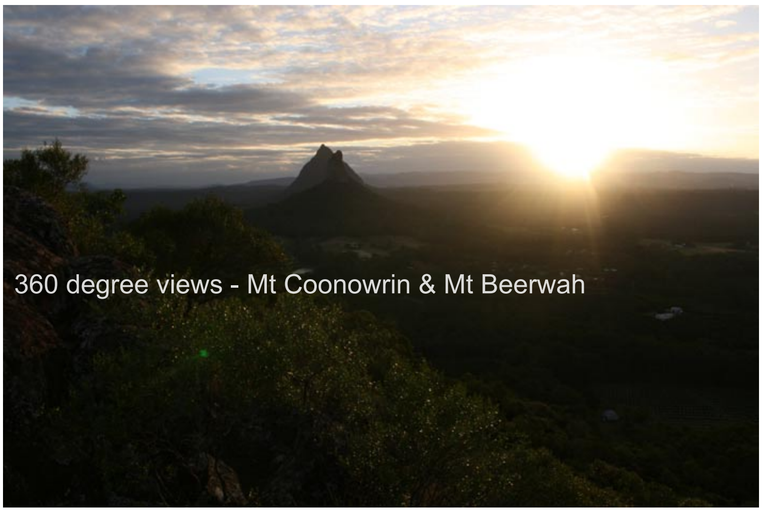
Existing car park

Existing grass tree grove

Arrival point on Summit Walk

Existing end point on Summit Walk

Existing views from summit



Existing erosion gully

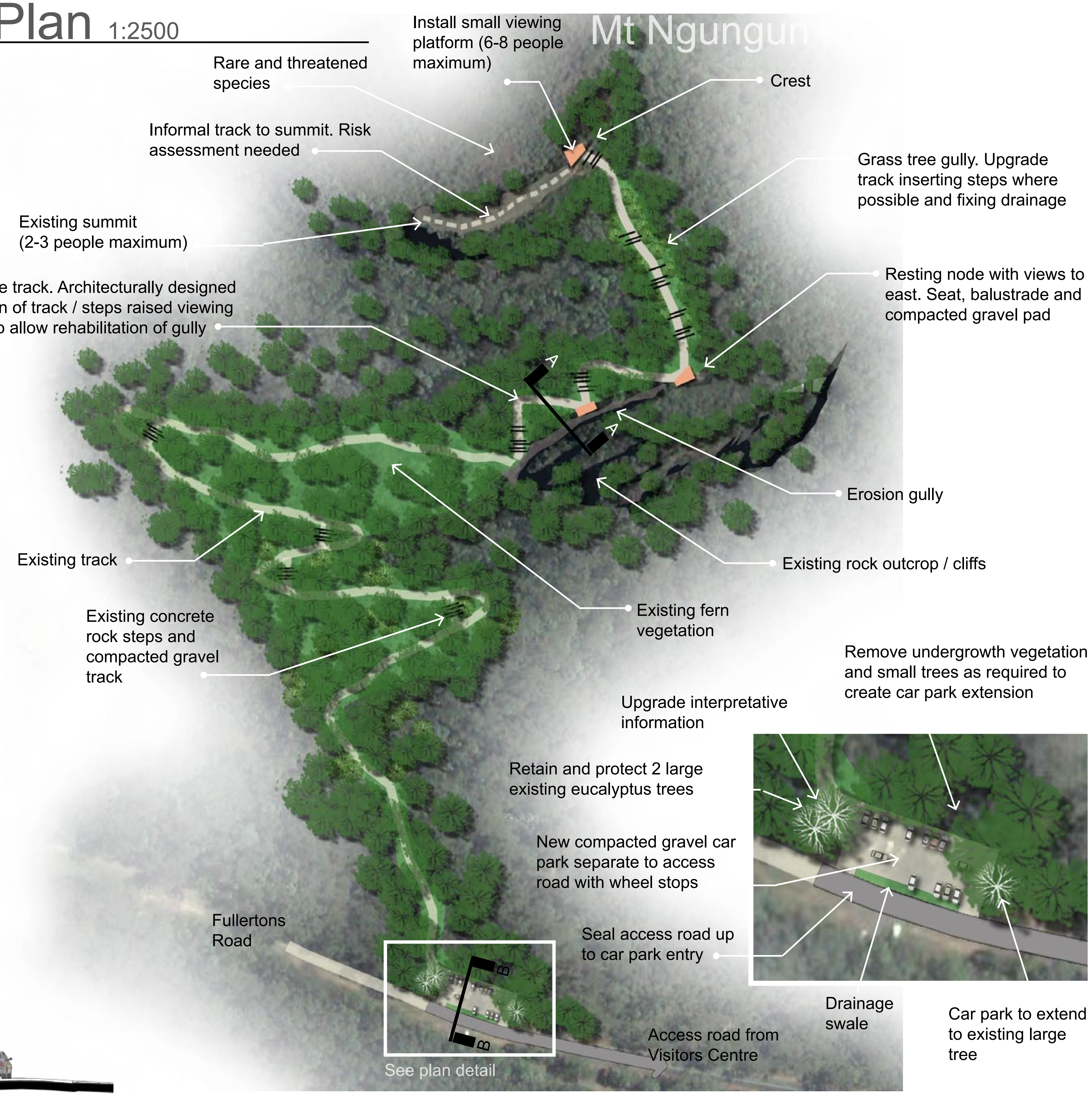
Figure 4.3 - Ngungun Summit Walk

Context

5min drive from Glass House Mountains Visitor Centre

Base aerial - Google Maps

Concept Plan 1:2500



Base aerial - Google Maps

July 2009

Section A - new track / viewing platforms adjacent existing erosion gully (not to scale)

Section B - new car park layout (not to scale)

INSPIRING PLACE

2. Ngungun Summit Walk

North

Inspiring Place

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Environmental Planning, Landscape Architecture
Tourism and Recreation

Back of Concept Plan (A3)

Mt Ngungun is already popular walk with the local community and would be difficult to realistically stop people undertaking the summit walk. The summit walk also has the advantage of:

- the previous investment in upgrading the lower part of the track;
- its close proximity to the visitor centre;
- the opportunity to realign parts of the track to reduce erosion and allow rehabilitation; and
- the attractive features of the walk including the native ferns, bushland, imposing gully and excellent scenic views provided.

Figure 4.3 shows photographs of the Ngungun Summit Walk.

A concept plan has been prepared for upgrading the walk experience. The key features of the plan are:

- Seal the last section of Fullertons Road to reach the car park and entry to the National Park.
- Upgrade directional signage from the Glass House Mountains visitor centre to the site.
- Upgrade and expand the capacity of car parking at the entry to the National Park, which will help address the safety issues with some visitors crossing the road.
- Install interpretative information about the Ngungun Summit Walk at the entry area.
- Install toilets in the future if need identified.
- Realign the walking track out of the eroded gully with a combination of steps and viewing platforms that may incorporate some interpretation.
- Install a basic viewing platform at the point of arrival to the summit to encourage safe viewing and help reduce the scramble to the end viewpoint, which has some inherent risk management issues.

A preliminary cost estimate for the proposed works is provided in Attachment 3.

4.2 Blackhall Range Lifestyle Adventure Precinct

4.2.1 Mary Cairncross Scenic Reserve

Mary Cairncross Scenic Reserve comprises 52 hectares of National Estate listed subtropical rainforest overlooking the Glasshouse Mountains. On a national scale, it is significant in being one of the few remnants of subtropical rainforest that once covered the Blackall Range, growing in optimum conditions on flat deep basalt soils in a high rainfall area; the Reserve is a living museum of diverse plant and animal life.

The Reserve is located approximately one hour's drive north of Brisbane at Maleny. The area was originally donated by the Thynne sisters, who were part of an early land-holder family, to the local Maleny community. In 1941 three of the Thynne's daughters, gifted 40 hectares of rainforest form this land to the public, in trust. Elizabeth Thynne gave a further 2 hectares in 1966. The deeds required the land to be kept as a nature reserve. The Landsborough Shire Council, now Sunshine Coast Regional Council, became the trustee and custodian of this Reserve. The Council provides some staff to assist in the day to day maintenance and operations of the site and capital investment into the site as required. The centre is supported by the active involvement of volunteers to assist with visitors to the site.

Mary Cairncross Scenic Reserve is committed to the conservation and enhancement of the natural habitat of the area, and to the provision of a valued community resource for education, research, recreation and enjoyment.

Photographs of the Reserve, its view towards the Glass House Mountains and existing facilities are shown below and in Figure 4.4.

Facilities at the Reserve include:

- Picnic tables and gas barbeques (open daylight hours)
- Children's playground (open daylight hours)
- Wheelchair accessible toilets (open daylight hours)
- Open recreation space (open daylight hours)
- Café and shelter (open 0900 – 1700 6 days per week, closed Mondays). The Sunshine Coast Regional Council advised that the current café operator is approximately 6 months into a 12 month lease, with no option to renew or extend.
- Education centre (staffed by volunteers) and rainforest interpretive displays. An auditorium is also available for meetings and presentations by community-based, environmental and school groups (open 0900 – 1700).
- Breathtaking views of the Glass House Mountains
- 2 kilometres of walking tracks (open 0900 – 1700)

The Reserve is trialing a change to the times when rainforest tracks are accessible to the public. Until September 30th 2009, the tracks will be open weekdays 7am - 5pm and weekends sunrise to sunset.

CURRENT VISITATION AND USAGE

Table 4.1 summarises the most current and accurate visitor information available for Mary Cairncross track visitors. The estimate of 85,500 visitors to the track aligns with the anecdotal estimates provided by staff at the Reserve. This figure includes tour groups, which account for around 5% or around 3,500 – 4,000 visitors per annum. Tables 4.2 to 4.4 provide a summary of tour group visitation 2003 – 2008. School groups are particularly strategically significant to the core mission of the Reserve and to date represent a successful market for the Reserve.

MCSR Rainforest Track Visitors				
FY 2008 - 2009				
2008-09	**Weekdays**	**Weekends**	**Total by First Week**	**Total By Month**
July	800	500	1,300	5,200
August	800	500	1,300	5,200
September	880	764	1,644	6,576
October	1,349	350	1,699	6,796
November	903	535	1,438	5,752
December	663	470	1,133	4,532
January	1,930	1,000	2,930	11,720
February	1,512		1,512	6,048
March	1,172	1,313	2,485	9,940
April	1,249	939	2,188	8,752
May	800	500	1,300	5,200
June	858	1,574	2,432	9,728
Total			**21,361**	**85,444**
Notes:				
Indicates where the actual data was na and visitation assumed				
This data is produced from a sensor counter located at the front door				
of the visitor centre. Some duplication is expected.				
This data includes visitors with guided tours				

Table 4.1 Rainforest Track Visitors 2008-09

Mary Cairncross Scenic Reserve Annual Tour Statistics												
By Calendar Year (2003 - 2008)												
	2003		**2004**		**2005**		**2006**		**2007**		**2008**	
Age/Type Range	**Persons**	**Tours**	**Persons**	**Tours**	**Persons**	**Tours**	**Persons**	**Tours**	**Persons**	**Tours**	**Persons**	**Tours**
Preschool	120	8	130	6	113	7	145	8	42	3	162	12
Primary Gr 1-7	1,322	70	1,698	90	1,516	76	1,696	97	1,390	98	1,720	126
Secondary 8-12	790	41	928	57	1,027	49	1,076	65	1,445	102	1,177	94
Adults	195	10	148	5	383	15	67	2	24	2	64	6
TAFE/Tertiary	-	-	-	-	5	-	60	5	-	-	-	-
Special Needs	82	5	55	6	-	-	392	24	715	61	687	69
Overseas	58	3	-	-	-	-	40	4	7	1	10	1
Total	**2,567**	**137**	**2,959**	**164**	**3,044**	**147**	**3,476**	**205**	**3,623**	**267**	**3,820**	**308**
Average Persons per Tour	**19**		**18**		**21**		**17**		**14**		**12**	
Note: Excludes non-booked, non-guided tours												

Table 4.2 Annual Tour Statistics 2003-2008

Total Tours by Month							
Month	2003	2004	2005	2005	2006	2007	Total
January	5	-	-	1	1	8	15
February	4	10	8	-	3	17	42
March	15	26	20	40	41	39	181
April	1	16	16	3	12	25	73
May	21	26	23	34	36	34	174
June	22	11	16	13	14	57	133
July	13	3	2	22	27	2	69
August	9	19	7	23	19	27	104
September	11	12	18	14	27	25	107
October	22	32	29	29	55	35	202
November	14	8	7	24	31	37	121
December	-	1	1	2	1	2	7
Total	**137**	**164**	**147**	**205**	**267**	**308**	**1,228**

Table 4.3 Total Tours by Month

In 1993, a report based on a survey of visitors and observation of traffic flows, estimated visitation to the Reserve at 450,000 per annum. A review of this estimate against existing data suggests that the estimate is bullish. Reserve staff estimate around 300,000 per annum visit the reserve and around 25% of those participate on the walk. With the available data it is difficult to assess the accuracy of this estimate. Given the facilities and the confirmed track visitors, this estimate is likely to be at the upper end of the visitor range for the Reserve.

Information from the 2008 Sunshine Coast Hinterland Standard Visitor Survey *(Tourism Sunshine Coast)* and other research material such as the Montville Tourism Survey 2008 *(James Cook Business School)* and the Caloundra Visitor Survey *(Tourism Queensland, 2003)* that broadly speaking a typical visitor to the Hinterland has the following characteristics:

- They are seeking a short break
- They come from Brisbane or South East Queensland
- They are travelling as an adult couple without children
- They are aged between 25 – 54 years
- They have a high annual household income

- They have generally visited the Hinterland before, see it as the only destination on this particular trip and usually spend 1 – 2 nights there.

- They use the internet to search for information and to identify and book product

- They visit a number of areas within the Hinterland, but mainly concentrate around Maleny and Montville

- They are very satisfied with their experiences in general and with various characteristics of the natural environment in particular as well as the range of cafes and restaurants

- They suggest improvements to the region could include restricting further commercialisation, provision of more car parking and improve signage

In addition, a survey of visitors at the Reserve in 1993 identified that for 65% of those surveyed (there were a total of 120 respondents to the survey) the most appealing aspect of the Reserve was the view of the view of the Glass House Mountains.

CURRENT CHALLENGES

There have been a number of challenges identified which are currently facing the Reserve, these challenges have largely eventuated as a result of visitor demands on the site and escalating operational costs.

These challenges include:

1. Traffic management issues both within the Reserve and on Mountain View Road. These issues relate to visitor demand for car and bus parking in peak periods, a lack of signage clearly identifying the entrance to the Reserve therefore preventing vehicles overshooting and doing a U turn to come back and the instinctive attraction for first time visitors to stop on the roadside and look at the view, thereby causing traffic management issues.

2. Within the boundaries of the Reserve and through the provision of interpretation boards, visitors are encouraged to stand on the periphery of the car park to look at the view. This poorly managed visitor access to viewing the Glass House Mountains is both unsafe and does not offer the best experience due to the road and a house being directly in the line of sight. In the absence of traffic controls,

visitors also cross the road to access the view or achieve a better aspect which is inherently unsafe.

3. Currently the Reserve operates on a gold coin donation only, receiving additional funds and in-kind support from Council and a strong volunteer base. As operational and maintenance costs escalate, consideration needs to be given to the introduction of a front gate ticket cost to the rainforest track experience.

4. In continuing to strive for the long-term sustainability and conservation of the site for future generations, consideration of opportunistic land acquisition for buffer and habitat corridor creation must occur.

5. Sustainable visitor management strategies within the Reserve must also be closely assessed, including the consideration of restricting visitor numbers and the most appropriate surface for the walking track.

PROPOSED CONCEPT

Drawing on the information identified herewith, the consulting team have developed an approach to the site which will help to minimise and in many cases eliminate the issues facing the Reserve and to build on it's core themes of education and conservation.

Figure 4.5 shows a functional concept for the site.

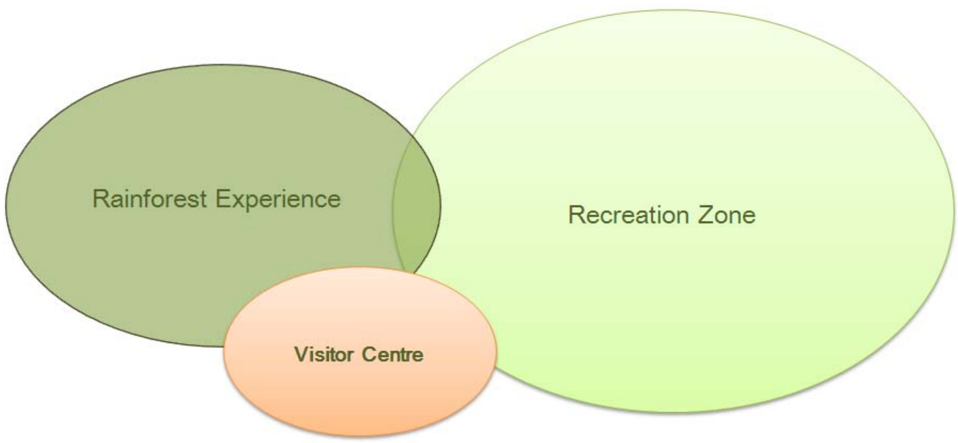


Figure 4.5 Proposed Functional Relationship

A concept plan has also been prepared for the proposed improvement of the arrival and visitor facilities at the Reserve.

Outlook from new Cafe and the Blackall Range Visitor Information Centre - panoramic of the Glass House Mountains

Existing cafe / kiosk

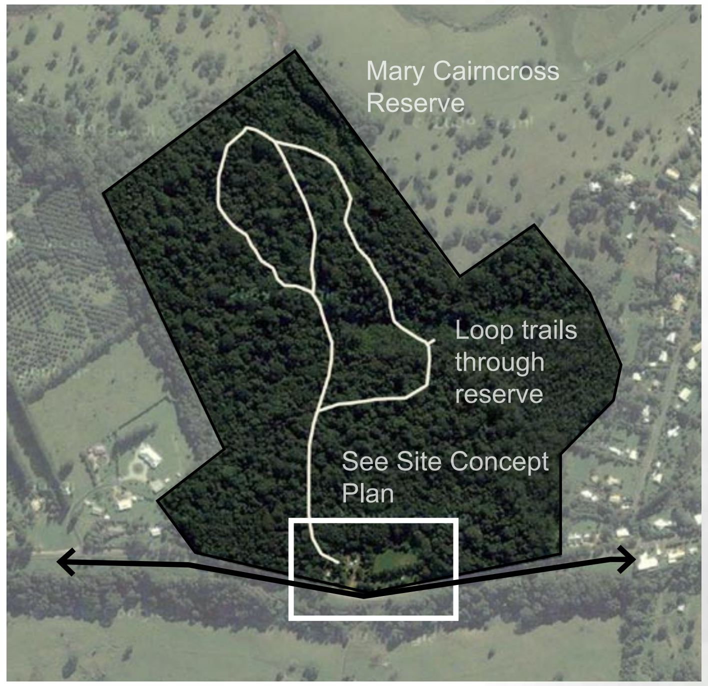
Existing cafe interior

Existing entrance to education centre

Path to education centre

Figure 4.4 - Mary Cairncross Scenic Reserve

Context

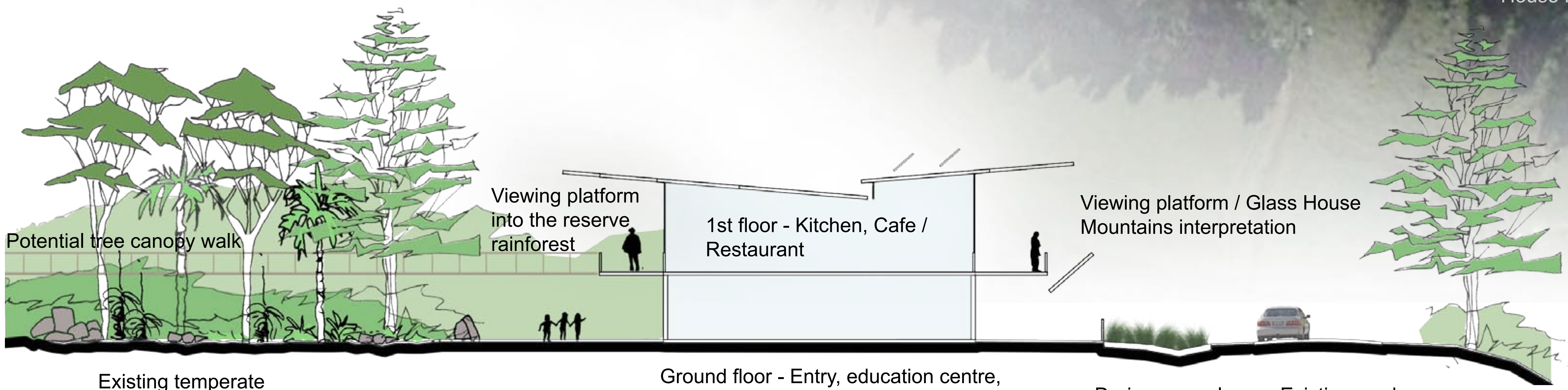


Base aerial - Google Maps

Concept Plan 1:1500

Base aerial - Google Maps

Section A - new track / viewing platforms adjacent existing erosion gully (not to scale



INSPIRING PLACE

July 2009

3. Mary Cairncross Scenic Reserve

North

Inspiring Place

Sunshine Coast Hinterland Nature Based Tourism Plan

Environmental Planning, Landscape Architecture
Tourism and Recreation

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The key features include:

1. The need for the development of a comprehensive site master plan, which embraces a zoned approach to the site and is focused on improved traffic management both within the Reserve and on Mountain View Road. The concept includes the relocation/removal of the current Glass House Mountains interpretation boards, the addition of signage to facilitate easy vehicle entry to the Reserve, improved parking and the creation of one focal point for first time visitors to the site – the visitor centre.

2. The development of a visitor centre facility on the site of the current café/kiosk, which will provide visitor orientation to the site and access to unsurpassed views of the Glass House Mountains from a vantage point, which eliminates the road and the house from the line of sight. The visitor centre will be a two story building (approximately 150 - 200m2 footprint) offering the following facilities:

    Level 1 – Visitor orientation, information provision, education centre, ticket purchase for the rainforest experience, tour group briefing and departure, toilet facilities, merchandise and rainforest experience entrance and exit.

    Level 2 – Access via lift and stairs. Views. Café with indoor and outdoor seating with capacity for approximately 80 – 100 people. The café will serve light meals and morning and afternoon tea with an emphasis on local produce being provided. It will also sell picnic provisions such as bottled drinks and takeaway sandwiches, wraps etc. The observation deck would be open to the general public and not restricted to café clients.

Market Demand and Financial Benchmarks

Based on the visitor data outlined above and understanding the characteristics of the core visitors market, it is reasonable assume that visitation to the region will grow in line with the forecast growth in the south east Queensland (including Brisbane) resident population pool. Subject to the capacity constraints of the site and its facilities, it is reasonable to assume that visitation to the Reserve would also grow overtime from current levels.

Whilst a detailed master plan and design for the proposed re-development are required to produce a robust feasibility analysis, in order to provide some indication of business potential, a “back of the envelope” analysis for the café and rainforest experience has been undertaken. The benchmarks and assumptions used in this analysis are outlined below.

It has been assumed that the rainforest experience will be a ticketed attraction in the future. For the purposes of this analysis, the ticket prices are assumed to be:

- Adult $5.00
- Child/concession/group $3.00
- Family (2 adults, 2 children) $10.00
- Visitor numbers to the attraction are assumed to be as follows:
- Estimated visitors to the Reserve per annum 300,000
- 25% of Reserve visitors participating in the Rainforest experience 75,000
- 30% of Reserve visitors visiting the visitor centre and café 90,000

The average estimated duration of visit to the attraction (for those visiting the café, visitor centre and/or rainforest experience) is 2 – 4 hours. Consequently the benchmarked average expenditure per visitor on food and beverage is $4.75 and on retail $4.25. Table 4.4 shows a summary of benchmarked expenditure per visitor by duration of visit.

Average Expenditure per Visitor by Duration of Visit			
	Duration of Visit		
Benchmarked Average Expenditure per Visitor	30 minutes	2 - 4 hours	All Day
Food and Beverage	$1.50 - $2.00	$4.50 - $5.00	$9.50
Retail	$1.50 - $2.20	$4.00 - $4.50	$9.50
		1 grazing time	1-2 grazing times

Table 4.4 Average Expenditure per Visitor per Duration of Visit

Estimated development costs (design, construction and contingency) for the new visitor centre (including interpretation and internal fit out), landscaping and traffic management are assumed to be $3.0 million. A comprehensive cost plan will be required in order to undertake a detailed feasibility and business plan.

Financial Analysis

A "back of the envelope" analysis using the assumptions outlined above indicates the following outcomes:

Ticket revenue (assuming 50% adults, 50% child/concession)	$300,000
Food and beverage revenue	$427,500
Retail revenue	$382,500
Total estimated revenue	**$1.1 million**

Operating costs are assumed to be 40% of ticket revenue, 50% of food and beverage revenue and 40% of retail revenue. The outcome indicates a reasonable operating surplus per annum and a potential pay back over approximately 5 years. This model assumes that all the facilities, including the visitor centre and café are operated by Reserve staff and management.

Should the café and/or retail component of the visitor centre be leased to a third party, the financial analysis would require amendment to reflect the alternate model. In addition, should Government meet the capital costs in full or in part this would also improve the viability of the café and associated facilities.

Preliminary cost estimate for the proposed works is provided in Attachment 3.

4.2.2 Obi Obi Gorge Zipline

The information contained within this section is largely attributed to Mr. Peter During, Managing Director of Australian Treetop Canopy Tours Pty Ltd. Mr During, originally from South Africa, is credited with introducing the concept of a zip line or canopy tour to Australia. His inaugural project has been in partnership with Forestry Tasmania; Hollybank Treetops Adventure was opened in January 2008. Further canopy tours are being considered in New South Wales, Victoria and Cairns.

Zip lines originated in South America as a means for scientists and researchers to traverse inaccessible forest areas. The practice was then expanded to journalists, photographers and other privileged individuals, and eventually to the nature based tourism market. The Hollybank Treetop Adventure (refer to Attachment 4) was modelled on successfully established businesses in South Africa, and North and South America.

About the Zipline Concept

A zip-line (also known as a flying fox, zip wire, aerial runway, aerial ropeslide or tyrolean crossing) consists of a pulley suspended on a cable mounted on an incline. It is designed to enable a user propelled by gravity to traverse from the top to the bottom of the inclined cable, by holding on or attaching to the freely moving pulley. Zip-lines come in many forms, most often used as a means of entertainment. They may be short and low, intended for child's play and found on some playgrounds. Longer and higher rides are often used as a means of accessing remote areas, such as a rainforest canopy. Zip-line tours are becoming popular vacation activities, found at outdoor adventure camps or upscale resorts, where they are usually one element on a larger challenge or ropes course.

Professional versions of a zip-line are most typically used as an outdoor adventure activity. In contrast to "flying foxes" professional courses are usually operated at higher speeds covering much longer distances and sometimes at considerable heights. The users are physically attached to the cable by wearing a harness, which attaches to a removable trolley. A helmet is required on almost all courses of any size.

Cables can be very high, starting at a height of over 9m and up to 50m high and travelling from 30m to well over 450m.

Costa Rica is known for their canopy tours where a vacationer can zip through the rainforest. The zip-lines are scattered among several platforms, some as high as 40m.

The world's only flat ground zip-line is located in Florida at the Zipline Safari course.

Two Royal Caribbean International ships, the Oasis of the Seas and the Allure of the Seas, will both have ziplines going over the "Boardwalk" areas of the ships.

Flying Fox Neemrana has started the world's first heritage zip tour at Neemrana Fort-Palace, Rajasthan, India. Set against the back drop of the ancient Aravali mountain range, Flying Fox Neemrana takes people on a 2 hour long heritage adventure, informing them about local history, flora and fauna as they zip through the course.

It is important to note that zip lines can be installed at any site; what makes a site successful is a hero feature or “signature line” such as traversing a ravine or crossing a river.

Commonly a zipline or canopy tour involves taking people up to the forest canopy and traversing between tree house-type platforms often referred to as “cloud stations”, along steel cables. The platforms are attached in an environmentally sensitive manner to the trunks of large trees within the high level of the forest canopy. Canopy tours combine natural tranquillity (while on the platforms) with the adrenalin of sliding above and through a pristine natural environment. Trained canopy tour field guides escort small groups of people through a series of platforms and cables, culminating in an adventurous slide back down to ground. Canopy tours may be undertaken by almost anyone. Providing the person is aware of the importance of safety and, follows the guides’ instructions, age is not a limiting factor – anyone between 3 and 80 will enjoy the experience. Figure 4.5 shows some canopy tour images.

The guides are an extremely important part of the entire experience and their value and contribution is critical to creating an educational and memorable forest excursion. They are responsible for the safety of the clients and are in a position to communicate a strong message on conservation and ecosystems – a “school in the treetops of the forest”. Optimum group sizes are usually 12 clients plus two guides. Groups are kept at least 30 minutes apart to give an exclusive experience for each group.

Figure 4.5 Zipline Images

The design and construction of a zip line in a protected environment demands a commitment to ensuring minimal environmental impact whilst not compromising safety. The following are features of world's best practice canopy tour design and construction:

Construction and attachment is non-permanent and non-invasive.

No structures are built on the forest floor.

No nails, screws or bolts are used to attach platforms to the trees. Instead a unique system has been designed where the platform grips the tree eliminating damage and ensuring a long life for the host tree.

The system is built in accordance with national engineering standards under the supervision of qualified professional engineers.

Eliminate the risk of falls by removing the 'human error' factor associated with traveller or lanyard transfers by allowing the guest to be ‘connected’ at the beginning of the tour and to only ‘disconnect’ at the very end of the tour.

Install platforms (Cloud Stations) that have a soft non-rigid sympathetic guest reception scoop which promotes a natural, comfortable and safe landing.

Use a suspension system that keeps the guest away from the moving traveller, eliminating the risk of finger or scalp injuries.

Prevent guest inversion by using a specially designed harness/suspension assembly.

Install a unique Automatic Reciprocating Evacuation device on each Cloud station to ensure safe and speedy evacuation if necessary.

Incorporate design features that eliminate the need for guests to wear gloves and/or contribute to their braking or flight completion.

Concept Application to Obi Obi Gorge Site

The Obi Obi Gorge site has enormous potential as a nature-based tourist destination. The natural and man-made features of the site, including the Lake Baroon spillway and the sub-tropical rainforest abutting the gorge as well as the Hinterland Great Walk trail all combine to make it a promising site for a zip line adventure product. A change in level not only facilitates an easy entry to a canopy tour but also provides great slides, breathtaking views and the feeling of additional height above ground. Natural features such as waterfalls, cliff faces, river pools, etc, become important additions to the surrounding scenery and natural beauty experienced on canopy tours.

Figure 4.6 shows photographs of the location at Obi Obi Gorge area. A concept plan has been prepared for the Obi Obi Gorge Zipline.

Existing car park and Great Walk entry

Existing car park

Existing car park with proposed location for ticketing / kiosk

View to dam wall - departure for the extreme zipline

Extreme zipline end point

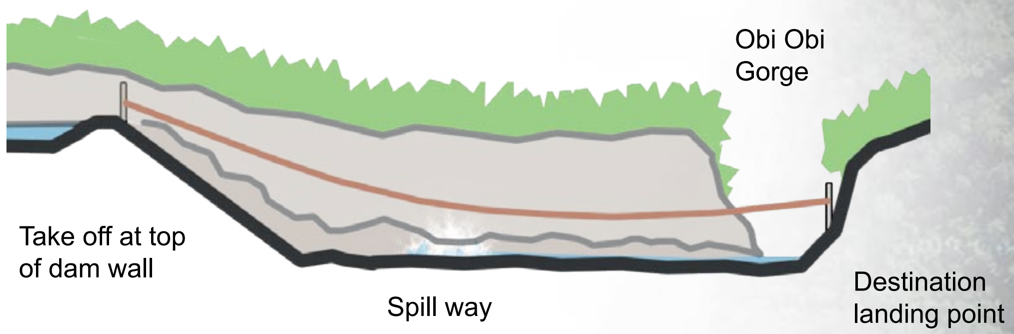
View the extreme zipline route

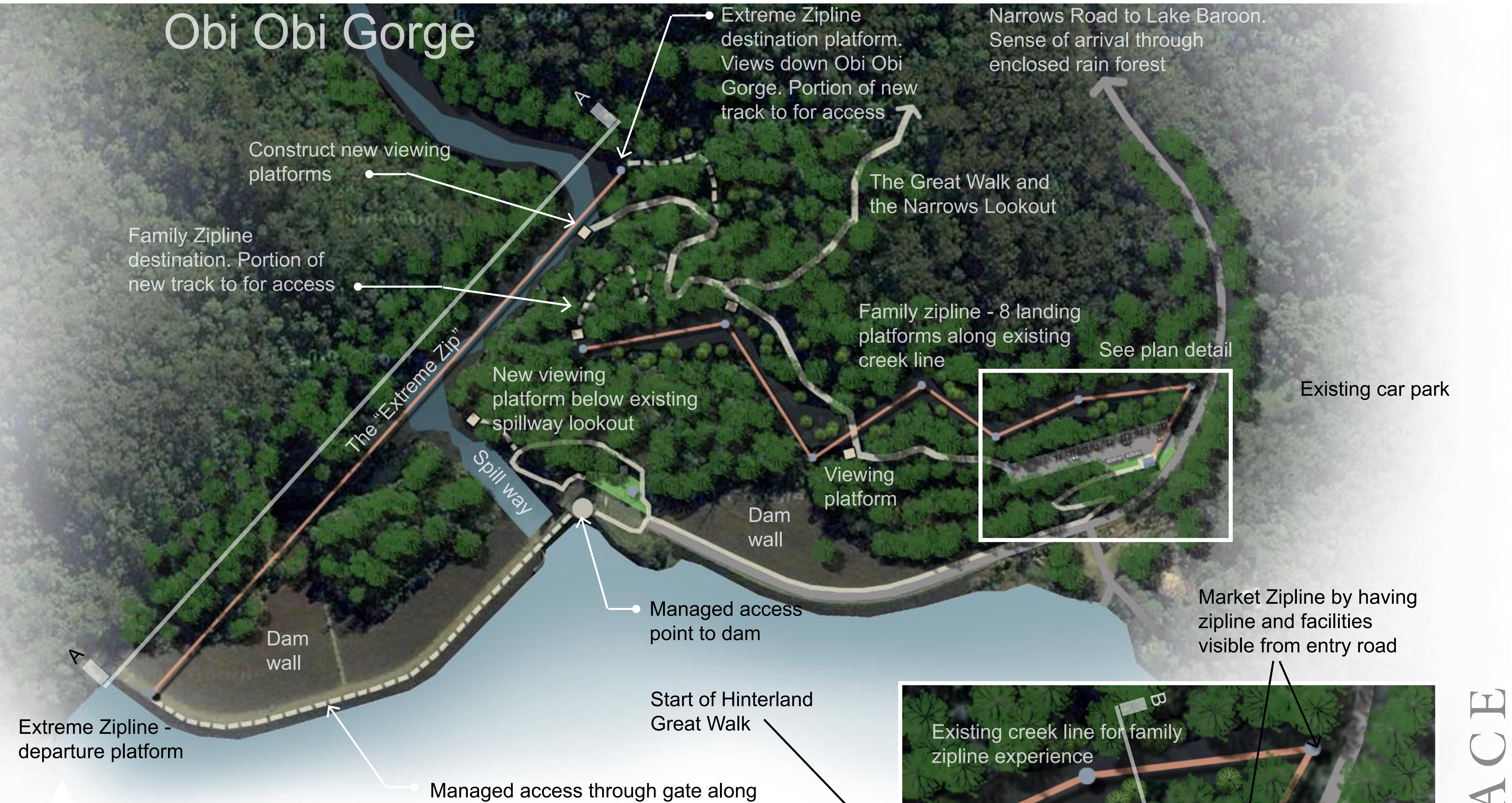
Figure 4.6 - Obi Obi Gorge Zipline

Concept Plan 1:4000

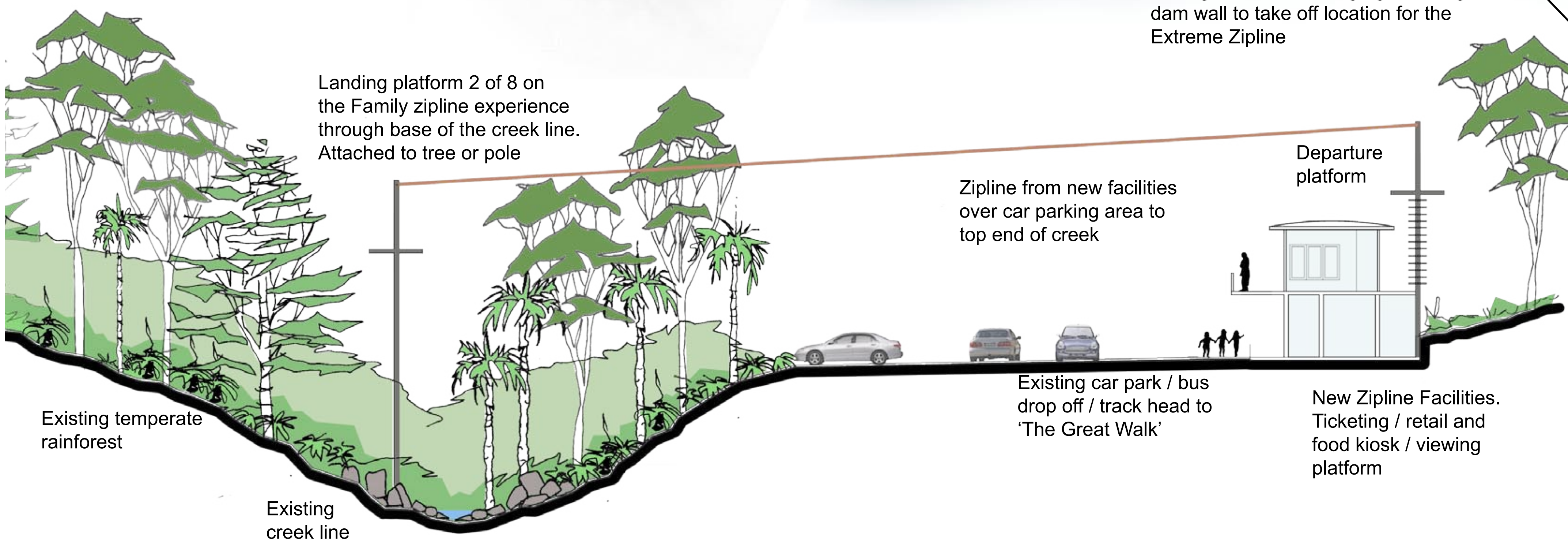
Base aerial - Google Maps

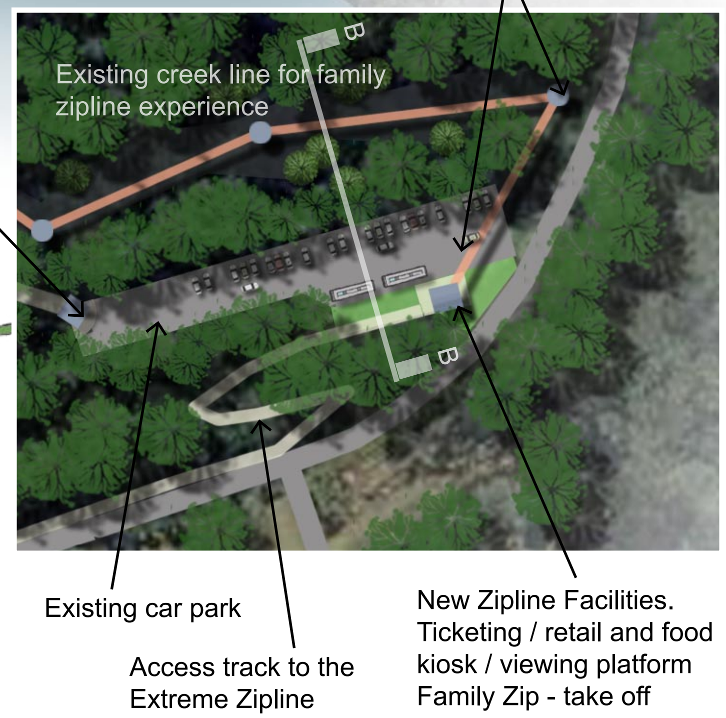
Section A - New Extreme Zipline (500m long)





Section B - New Family Zipline and facilities, landing platform 1&2 of 8 (500m long)





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4. Obi Obi Gorge Zipline

Sunshine Coast Hinterland Nature Based Tourism Plan

Environmental Planning, Landscape Architecture
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The concept plan indicates some of the proposed features of the Obi Obi Gorge Zipline, including:

Vehicle entry to the site from Montville on the scenic Narrows Road to Lake Baroon.

Utilisation of the existing large Hinterland Great Walk car park for parking of zipline guests.

Development of the zipline café and visitor centre (including safety briefing and gear room) on the cleared and elevated site immediately adjacent to the car park.

Zipline experience departure from the café above and across the car park into the adjacent rainforest area and alternatively a short walk from the café up to the top of the dam wall for a spectacular “signature line” departure off the dam wall and down the gorge for approximately 400m.

Development of a zipline tour of approximately 2.5 – 3.5 hours duration comprising some 8 – 10 platforms.

Optimum group sizes are usually 12 clients plus two guides. Groups are kept at least 30 minutes apart to give an exclusive experience for each group.

Utilisation of the existing walking trails for those not participating in the zipline tour but providing great viewing platforms of the zipline clients in action.

The proposed route is conceptual only and a detailed route plan will need to be undertaken to further explore the feasibility of the site to host a zipline experience.

The proposed zipline route is outside the National Park but would involve the approval of the appropriate Water Authority to allow access to dam. This is currently locked and security could be secured with access only permitted to the operator and guides for the purpose of the extreme zipline run. Initial discussions with Queensland Parks and Wildlife Service were receptive to the notion of a zipline attraction being located near the starting point of the Great Walk. The existing car park is large and considered sufficient to handle both uses.

Indicative Market Demand and Financial Benchmarks

The benchmarks contained herewith are based on the experience of Mr. Peter During and due to the limitations of the information available at this stage, it has not been customized to reflect the Obi Obi Gorge site. A detailed feasibility study of the proposed zipline attraction will be required for the concept to move forward.

Key benchmarks for zipline attractions of the scale described in the concept section above include:

Hours of Operation

It is assumed that the proposed facility will operate up to 12 tours per day, for 364 days of the year. It will only close for Christmas Day and for extreme weather conditions, scheduled maintenance, inspections, emergency and safety checks, or any other special alerts/requirements.

Seasonal Impact

Tree Top Tour excursions are particularly attractive and exciting in wet weather. It is therefore assumed that operations will continue throughout the year. Operations will only be suspended due to extreme weather conditions, such for storms, high winds, and lightning.

Pricing

As a premium new and unique product with limits on daily supply, the pricing has been assumed to be at a premium. The proposed retail price will be $99 per adult and $66 per child and adjusted to demand in the peaks, shoulders and winter season. This pricing structure will provide the business with an opportunity to package the experience across the year and make it affordable for the local market. There is an opportunity to run nights tours and these tours could attract a higher price point as is the case with Sydney Bridge Climb night and dawn tours.

The educational component, excitement factor and personal challenge are key points of differentiation together with the setting and interpretation. The Sydney Harbour Bridge Climb is $170-249 for adults and $100-125 child and other adventure activities such as bungee jumping sell for $145 plus, and rafting $145. Australian Canopy Tours experience at Hollybank Treetops Adventure in Tasmania has proven that this price point is acceptable to the market.

Market Demand

The Obi Obi Gorge Zipline will be positioned as a premium product equivalent to the Sydney Harbour Bridge Climb. This experience will break new ground in Queensland's nature based product range. Target markets for this experience include:

- Social fun seekers;
- Active explorers
- Self discoverers

The major source market would be Brisbane residents and other Queensland locals, with interstate and international visitors attracted to the site for day visits and short breaks from the coast.

A financial analysis of comparable products indicates that:

- breakeven is achieved with 17,500 visitors per annum
- moderate profit levels are achieved with approximately 20,000 – 25,000 visitors per annum
- high levels of profitability are achieved with in excess of 35,000 visitors per annum.

With the assumptions outlined above, the approximate visitor capacity of the attraction is 50,000 visitors per annum. Therefore forecast utilization rates for the attraction would be:

- Breakeven: 35% utilization
- Moderate profit levels: 40 – 50% utilization
- High profitability: 70% utilization

Whilst the assumed price point of the attraction is at a premium and the price sensitivity of the target market remains untested, current visitor levels to the hinterland and its various attractions would indicate that visitor levels in excess of those required to achieve moderate to high profitability would be readily attainable.

Operational and Maintenance Costs

As with any tourist attraction, or indeed any service business, the imperative to contain costs is often the difference between a successful business and an unsuccessful business. Critically, maintenance costs and significant operational overheads for a zipline are minimized due to the nature of the infrastructure and its construction techniques. Employing a minimal number of full time staff is the key to containing costs. The table below summarises the staffing requirements at Hollybank Treetop Adventures. Note, casual guides typically undertake 2 tours per day and are paid per tour rather than per hour.

Position	Type	No.
Manager Director	Full-time	1
Administration Manager	Full-time	1
Guide Leader	Full-time	1
Reception	Casual	2
Guides	Part-time	2
Guides	Casual	8

Cost and Return on the Obi Obi Gorge Zipline

Preliminary cost estimate for the proposed works is provided in Attachment 3.

Comparable projects have required a capital budget of approximately $2 - $3 million, including a high-volume throughput, utilizing 8-10 cloud stations and the development of a café and associated visitor facilities.

Under the three visitor scenarios above, visitor numbers of 35,000 per annum and the adult ticket price of $99.00 per adult and $66 per child, benchmark analysis indicates that the proposed venture will provide a sound return on investment within the first two years of operation.

BUSINESS MODEL OPTIONS

There are a number of possible business models to consider in order to progress this concept through design, planning and implementation. A detailed feasibility will explore the benefits and risks of all options more comprehensively.

1. A public/private partnership i.e. the Hollybank model
2. A long term lease for a private company to develop and operate the attraction on public land
3. A wholly public venture; the State develops and operates the attraction i.e. the Ma Mu model

Given that the benchmark analysis indicates the potential for strong returns on investment, option 1 or 2 would offer a logical pathway forward.

4.2.3 Mapleton Falls National Park

Mapleton Falls National Park is located 2kms from Mapleton and allows visitors to obtain spectacular views of the escarpment, the 120m cascading waterfall and extended scenic views of Obi Obi Valley. The falls drop over a series of black basalt rocks into the wet rainforest below. The National Park protects a remnant forest that once covered much of the Blackall and Conondale Ranges. It provides habitat for a variety of plant and animal species including peregrine falcons, eastern whipbird and fruit doves.

The National Park offers visitors the opportunity to:

enjoy the views from a large deck overlooking the escarpment and waterfall;

undertake a 1.3km walk on the Wompoo Circuit through the rainforest and tall eucalypt forest;

start or continue on a section of the Hinterland Great Walk (towards Delicia Road Conservation Area to the north and to Flaxton in the south); and

utilise a day area with picnic and toilet facilities available.

Wheelchair access is available to the lookout, toilets and interpretation boards. There are limited car parking spaces inside the National Park with overflow car parking, when required, occurring on the entry road and turning circle.

The falls were originally known as Baroon Falls but in 1915 the name was changed at the request of the local people. In 1919, the local residents of Mapleton erected an aerial tramway and lookout to view the chasm. The aerial tramway consisted of a cage suspended with overhead pulleys on a wire rope that was stretched across the escarpment and anchored to trees. The span was about 180 feet and passengers were able to winch themselves across towards the top of the falls and back again, to achieve a better view of the falls and landscape. Historic records indicate that the aerial tramway was problematic with stranded passengers and the cage falling into disrepair, before ceasing to operate. Images of the aerial tramway and local residents standing on the cliff-face edge below the waterfall indicate their pursuit of adventure in this natural environment.

Currently the visitor experience at Mapleton Falls National Park is largely passive rather than engaging. Many visitors stroll out to the lookout and some may then choose to continue go on to the Wompoo Circuit. The information and interpretation is very similar to many National Parks with a focus on the natural flora, fauna and walks.

There is a very rich early history of the Blackall Range and its small towns. The pioneers selected land plots in the 1880's and cleared the dense vegetation to become a prospering fruit growing area. Tramways were used to transport passengers, supplies and produce into the area. Montville was originally called Razorback because of the steep ridge upon which the settlement began. Life was shard at times – heavy rains could makes the supply tracks impassable and locals would have to survive on local fruit and produce for weeks at a time. Over time the Hinterland became widely recognised for its cool summers and mild winters, and developed a thriving holiday retreat business. The social history of the Hinterland and the Mapleton area is not being told despite the apparent interest of increasing number of visitors to the area. Discussions with local tourism operators and the visitor centre indicated a regular request for information about the history of the Hinterland but there is currently no dedicated publication or place where this is easily presented.

It is considered that Mapleton Falls National Park could be a place to embrace the social history in a powerful way – as an unexpected story-line set within a natural environment where the common interpretation theme may be about 'living at the edge'. This theme can relate to the natural values of the remnant forest and the survival of the flora and fauna species. It can also relate to the spirit and resilience of the early pioneers that had to survive against all odds in the remoteness of the Hinterland. The history of the aerial tramway and the images of locals standing on the cliff-face, despite the risks involved, are characteristic of this way of life.

The way to present the 'living at the edge' story is through thematic interpretation. Interpretation has a key role in shaping visitor experience through influencing the way that visitors perceive and connect with the place. It is not just about information panels but using different techniques to capture the attention and engage with visitors. For instance the opportunities within the National Park for interpretation could include:

- an Introduction to the 'living on the edge' theme on the approach to the existing lookout and near the last remaining visible sign of the aerial tramway (bolt in the large box tree);

- some story telling of the early settler families/individuals (e.g. William and Thomas Smith as early settlers, and constructed the aerial tramway);

- upgrading the interpretation of the beautiful Wompoo Circuit with features related to the theme about the natural environment;

- changing the role of the existing peregrine lookout into more of a contemplation place (it does not offer great views) where the story of the local person that once fed the peregrine falcons can be told along with some inspiring poetry (maybe using self triggered sound effects).

It is considered that the integration of the scenic beauty of the National Park with the social history of the area, will give the place a strong point of difference to other locations within the Hinterland.

A concept plan has been prepared for the site and Figure 4.7 provides photographs. The key features of the concept plan are:

- Improving the turn-around area for a bus at the entry to the National Park by allowing the capacity for a 'Y' turn (requires some vegetation clearing).

- Formalising provision for over-flow parking down the entry road (currently a degraded edge from informal parking).

Introduce the ‘living on the edge’ social history connection with the place on the walkway to the lookout.

In the future, as funds permit or when plans are being made for replacement of the existing structure, consideration be given to the potential to construct an extension to the lookout which would allow visitors to have an exciting view by reaching the point of being in space (currently the lookout is about 8-10m short of this point)[10].

Upgrade interpretation of the Wompoo Circuit to incorporate the ‘living on the edge’ theme.

Conversion of the existing peregrine lookout into a more effective lookout (may require vegetation clearing, viewing platform upgrade) and a contemplation space involving interpretation related to the peregrine falcons (and local resident story) and use of poetry to enhance the setting value.

Preliminary cost estimate for the proposed works is provided in Attachment 3.

[10] Site investigations were undertaken to assess the potential for other lookout points near the existing two lookouts but no site offered any better views or position than the existing lookout platform. The peregrine lookout offers limited views to Obi Obi Valley through trees and no views back to the waterfall.

Existing bus turning area

Existing lookout platform

Location for potential interpretation panel

Peregrine lookout

Existing day use area

View from existing lookout platform

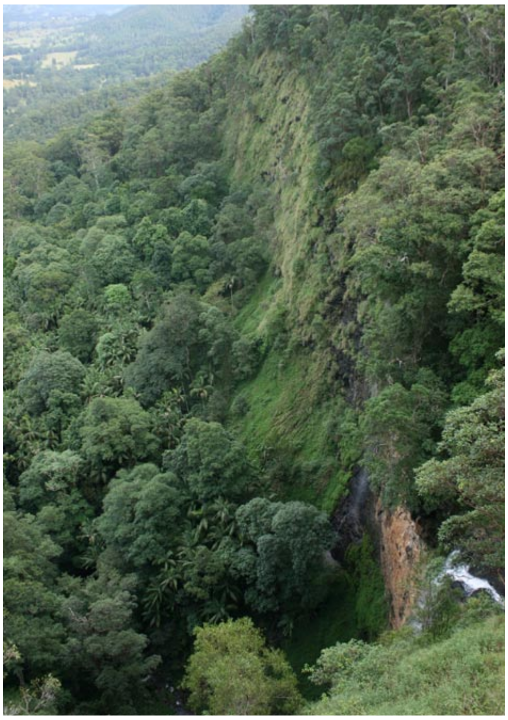
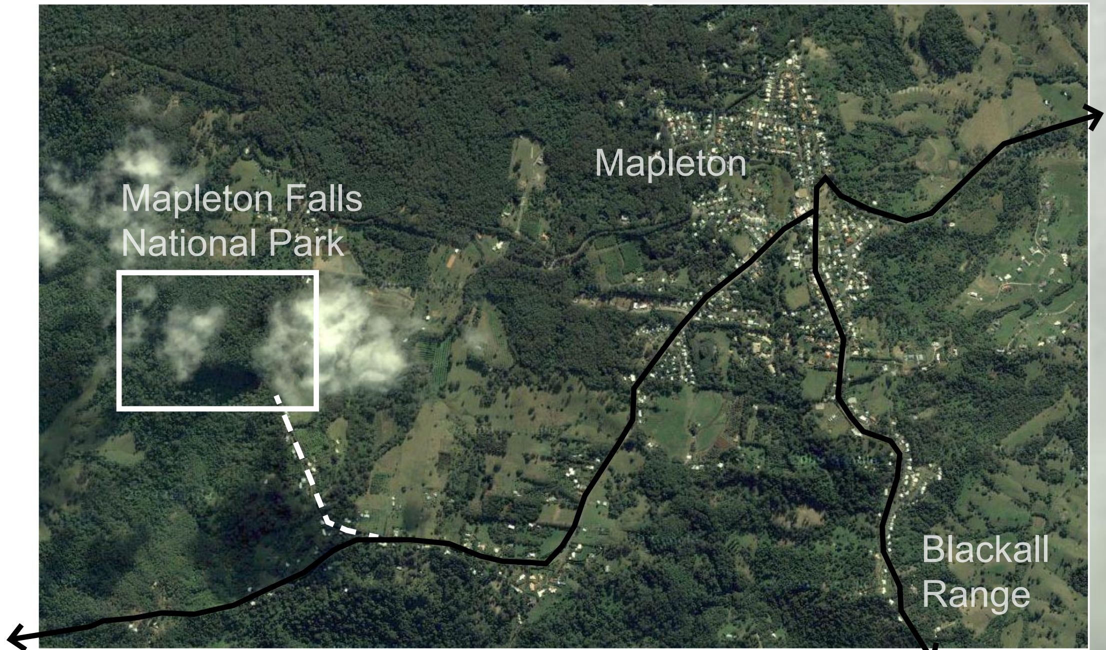


Figure 4.7 - Mapleton Falls National Park

Context

Concept Plan 1:2000



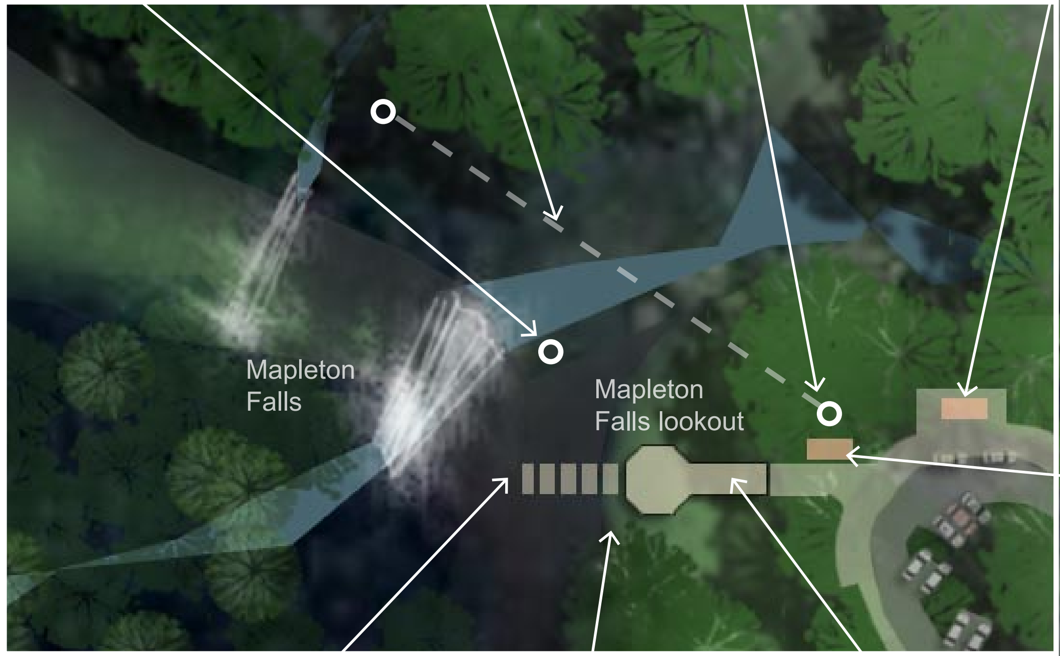
Base aerial - Google Maps

Indicative historic location where local people stood beside falls at cliff face

Indicative route of the historic aerial tramway across face of falls

Existing aerial tramway construction pin visible in existing tree

Upgrade existing interpretation panel



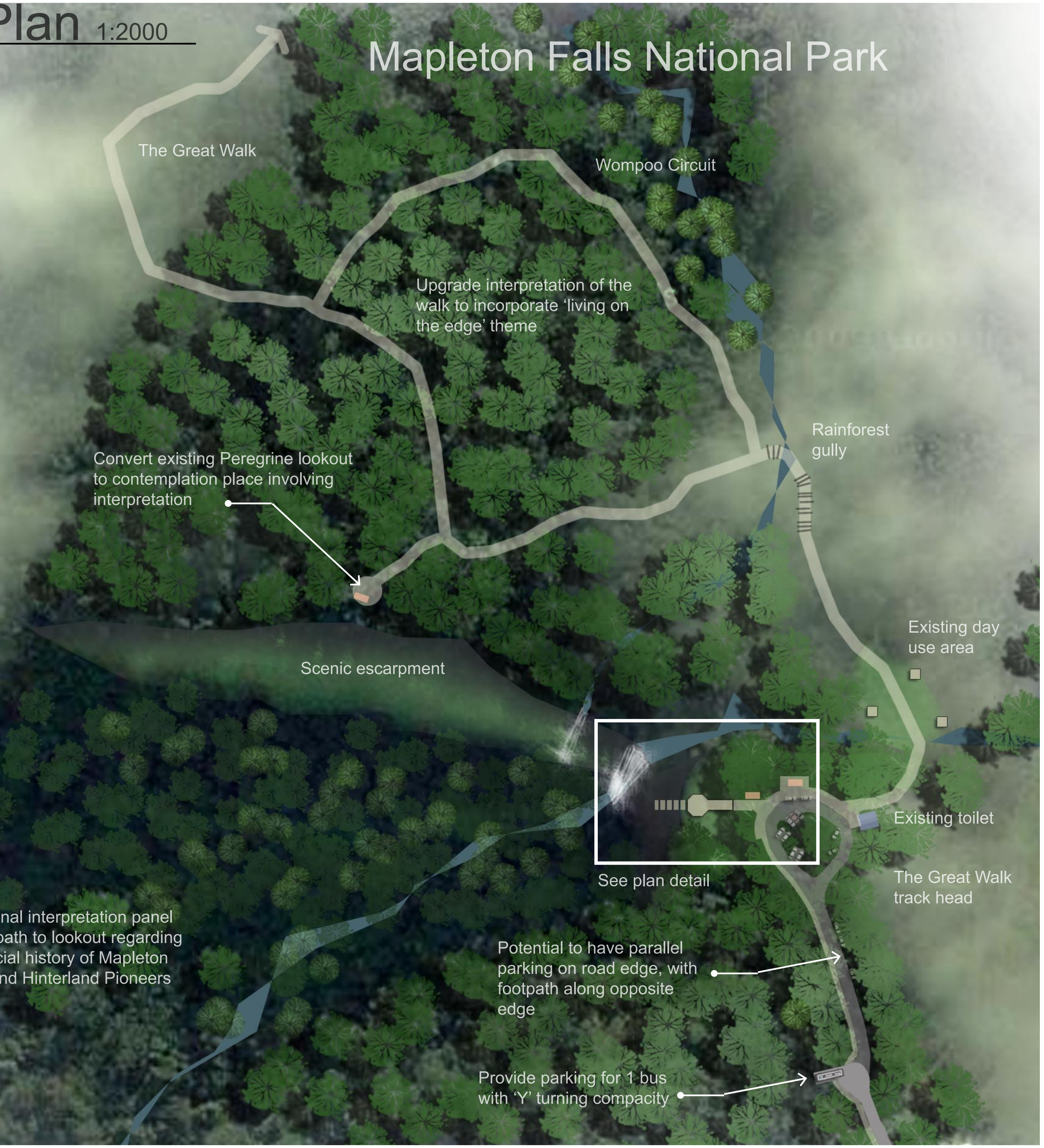
Additional interpretation panel along path to lookout regarding the social history of Mapleton Falls and Hinterland Pioneers

Existing car park

Potential lookout platform extension to create a cantilevered air-walk that would extend into space over cliff face in future years

Existing edge of hill side before becoming shear cliff face

Existing lookout platform



Base aerial - Google Maps

INSPIRING PLACE

June 2009

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5. Mapleton Falls National Park

Sunshine Coast Hinterland Nature Based Tourism Plan

Environmental Planning, Landscape Architecture
Tourism and Recreation

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4.5 Conondale National Park nature-Based Tourism Precinct

The Conondale Range has been rightly described as the 'hidden treasure' of the Sunshine Coast hinterland. A short journey from the coast brings you in contact with cool and beautiful forests as far as the eye can see. The Conondales are the largest patch of subtropical rainforest and associated eucalypt forest remaining on the Sunshine Coast.

The forests contain many hundreds of different plants, birds and animals that depend on this ecosystem for survival. It is literally the last stand for many of our endangered species - some of which are absolutely unique in the world.

The nearest facilities are at Kenilworth, an attractive small hinterland town with a history of dairying and timber-getting. An excellent historical museum graphically documents this past.

The main activities conducted within the area include walking, camping, picnicking and day use activities, mountain biking and forest drives. Visitor facilities providing access to the Conondale Range area include:

Charlie Moreland Park: This picturesque camping area is located on the banks of Little Yabba Creek, with excellent waterholes for swimming. It is ideal for families, large groups and caravans. It is a large grassy area with plenty of shade and a capacity of about 500 campers. There is an information display in the campgrounds, and facilities include toilets, tap water and limited BBQ's and tables.

Booloumba Campgrounds: This very popular camping ground has been divided into 4 areas;

- Area 1 - [pre-booked only] offers tent camping on individual sites. Toilets, tap water, cold showers and a gold phone are available.
- Area 2 - day use only, no camping
- Area 3 - [pre-booked only] secluded individual tent sites nestled beside the creek.
- Area 4 - Open grassy campsites suitable for caravans and large groups.

Sunday Creek Environmental Education Centre (SCEEC): The SCEEC is situated on a special lease in the Jimna State Forest 792, approximately 45 km north of Kilcoy and 30 km west of Kenilworth. The centre is run by Education Queensland and has accommodation facilities available for group bookings on most weekends and school holidays. The SCEEC offers visiting groups:

- Residential accommodation exclusive to state schools for up to 38 students and supervising adults
- Learning experiences based on cultural perspectives (goldmining, logging, Indigenous), community building, personal growth, creative expression, energy and change.
- Three day (off campus) wilderness trekking programs
- Eco-living, minimal impact camping
- Weekend use
- Resident artist

Mountain biking: there are generally three areas in which to ride in the Conondales - Curramore or Bellthorpe areas and Charlie Moreland Park and surrounds.

The Conondale Range Committee is credited with rescuing the Range from the onslaught of bulldozers and chainsaws 30 years ago when massive hoop pine plantations were planned. Since then members have sought to inform and educate visitors to the area, adding to the success of eco-tourism which recognises that people often need to visit native forests to stay in touch with the natural environment. The publication of *Walking on the wilder side... in the Conondales* (Conondale Range Committee, 2004) further demonstrates the groups continued effort to preserve, educate and enjoy this sanctuary for generations to come.

THE CONONDALE RANGE GREAT WALK

Great Walks of Queensland is a $10 million Queensland Government initiative that is creating a series of world-class walking tracks through some of the State's most beautiful natural areas, including three World Heritage Areas. Each of the Great Walks of Queensland offers a range of experiences, from short, easy strolls to half- and full-day walks and extended overnight adventures. This mix ensures that people of all ages and abilities have the opportunity to explore, experience and enjoy Queensland's parks and forests.

The Great Walks of Queensland which are complete and open to the public are Fraser Island, Gold Coast Hinterland, Mackay Highlands, Sunshine Coast Hinterland, Wet Tropics and Whitsunday. Four more Great Walks are being planned and due for completion in 2009 and 2010; including the Conondale Range Great Walk .

Set in the upper Mary Valley to the west of the Sunshine Coast, this 60km circuit walk will pass through heavily forested valleys and ridges in the Conondale National Park. The area has a rich natural and cultural history and is being increasingly sought out as a “clean, green” alternative to the popular coastal holiday destinations. The main track entrance is within an hours drive from the Sunshine Coast and a two hour drive from Brisbane.

The Great Walk begins in the lowland at the Booloumba Creek camping and day use area; from here the track ascends up and along spectacular gorges, past tranquil creeks and cascading waterfalls to the tall, wet forests of the high country, before returning through more open forested areas. There are magnificent viewpoints along ridgelines and from the Mount Allan Fire Tower.

The Conondale Range Great Walk caters for 3 overnight camp sites for six to eight individual tent sites, separated into nodes, each with platform seats. Untreated drinking water and a toilet will be provided at each camp. Open fires will not be permitted. Camping site use will be managed by DERM. Campers at Booloumba Creek and Charlie Moreland camping areas will be able to take a day walk along sections of the track. Day walkers can also find accommodation nearby in caravan park, bed and breakfast and hotel/motel style accommodation.

Short walks are also available to Booloumba Falls and the Mount Allan Fire Tower. This 5km section of the walk known as the Mount Allan Fire Tower track was opened in December 2008 to allow Christmas visitors the opportunity to experience just a little of the 60km Great Walk track. The Conondale Range Great Walk is scheduled to open in mid-2010.

Concept Overview – Conondale Range Wild Walk

The potential of the Conondale Range as a nature-based tourism destination for the “purist” has long been recognized. Testament to this is the development of the Conondale Range Great Walk. An analysis of premium walking products across Australia (refer to Attachment 5) indicates that there is a exciting opportunity to capitalize on the existing walking track infrastructure and develop a premium walking product utilizing sections of the Conondale Range Great Walk.

Recent survey's indicate that a typical visitor comes from Brisbane or south east Queensland for a short break, is travelling as an adult couple without children and has a high annual household income. These visitor characteristics translate into likely demand for a two night three days, premium walking product offering an outstanding short green break.

A concept plan has been prepared for the Conondale Range Wild Walk.

Conondale Range Wild Walk Itinerary

In line with the notion of a walk fitting the requirements of the short break market, an experience, which requires 3 full days and 2 nights door to door, has been developed. In addition, the proposed route has been informed through discussions with Queensland Parks and Wildlife Service staff that are responsible for the alignment and construction of the Conondale Range Great Walk. The proposed itinerary for the Wild Walk is outlined in Table 4.5.

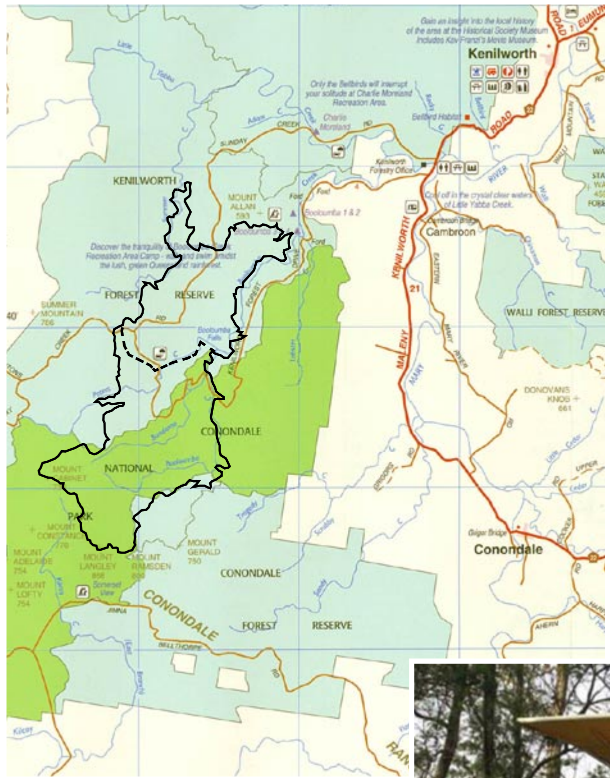
	Morning	Afternoon	Overnight
Day 1	Travel to meeting point for vehicle drop off, gear check & briefing – QPWS Regional Office (Kenilworth). Transfers to the departure point at Booloumba Creek via Wild Walk vehicle.	Lunch at the day use facilities at Booloumba Creek. Departure on Great Walk trail towards Hikers Camp 1. Approximately 6 km	Exclusive standing camp located in the vicinity of section 1.3 (viewpoint). Gourmet dinner celebrating local produce & fine wine.
Day 2	Depart main track heading northwest along a new purpose built track and part of Funnels Hut Road to link up with the Great Walk. Approximately 5 km	Lunch enroute. Continue along the second half of section 3 of the Great Walk towards Hikers Camp 3. Approximately 7km	Exclusive standing camp located in the vicinity of Hikers Camp 3. Gourmet dinner celebrating local produce & fine wine.
Day 3	Depart Hikers Camp 3 and follow the Great Walk section 4 via Mount Allen. Conclude walk at the Booloumbra day use area. Approximately 8 km	Transfers in Wild Walk vehicle. Return to QPWS office to collect vehicle, return gear and de-brief. Travel home.	

Table 4.5 : Concept Itinerary for the proposed Conondale Range Wild Walk

Operational Structure

The operational structure of the Wild Walk is based on an exclusive lease arrangement between the State Government (Queensland Parks and Wildlife Service) and a single tour operator. It is assumed for the purposes of this analysis, that the development costs required to upgrade infrastructure, purchase equipment and construct standing campsites would be the

Wild Walk Location



Base map - Produced by the State of Queensland 2005

Precident image of a demountable camp (Freycinet, Tasmania)

Concept Plan 1:50,000

Base aerial - Google Maps

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6. Conondale Range Wild Walk

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responsibility of the tour operator. An indicative cost estimate for these activities has been made in this analysis.

QPWS would continue to have responsibility for public infrastructure within the National Park including maintenance of the public infrastructure (e.g. walking tracks, campsites, water supply points).

Indicative Financial Analysis

Indicative financial analysis has been developed for the Wild Walk concept outlined above. It is important to note that this analysis is based on a number of high level assumptions drawing on the experience of the consulting team and project benchmarks. The assumptions, which have been made may or may not materialize and the outcome will affect the financial viability of the proposal.

Market Demand and Revenue Assumptions

It is assumed that the primary market for the Wild Walk will come from Brisbane and southeast Queensland, with a small interstate and international component.

The demand assessment for the Wild Walk and the key assumptions driving the revenue are shown Table 4.6.

Key Drivers	Year 1 - 3	Year 4 & 5	Year 6 on
Walk Days	3	3	3
Walk Nights	2	2	2
Walk Season Weeks (Feb - Nov)	40	40	40
Departures / Week	2	3	4
Total Departures pa	80	120	160
Maximum Walkers / Departure	10	10	10
Maximum Capacity (Walkers only) pa	800	1,200	1,600
Forecast Occupancy Rate pa[11]	80%	80%	80%
Forecast No. of Walkers pa	640	960	1,280
No. of Guides / Departure	2	2	2

Table 4.6 Demand Assessment.

[11] The Year 1-3 rate reflects on the relative small number of departures and group size, proximity to Brisbane and perceived ‘novelty’ or ‘brag experience’ associated with the new walk.

The price point for the Wild Walk has been derived from a benchmark analysis of comparable product, as shown in Attachment 5. For the purposes of this analysis the cost of the Walk per participant includes all transfers, accommodation, food and beverages and guides for the duration of the experience. The assumed cost of the walk experience per participant commences at $1,200 (years 1 -3), increasing to $1,300 in years 4 & 5 and $1,400 from year 6 - 10. At approximately $600 per walker per night, the Wild Walk price point is comparable to other premium walks, which utilize standing camp accommodation, such as the Bay of Fires Walk and Maria Island Walk in Tasmania.

Key Cost Inputs

The operational cost assumptions for the Wild Walk are shown in Table 3.

Item	Basis of Assumption	Figure
Food and Beverage	% of total revenue	20%
Administration Payroll	mean salary including on costs	$65,000
Administration other expenses	% of total revenue	3%
Guides Payroll	cost for 2 guides per departure	$1,600
Marketing	% of total revenue	3.5%
Motor vehicle (lease payment)	Fixed cost	$5,000
Supply, servicing & maintenance of standing camps	Fixed cost	$20,000
Equipment	Fixed cost	$15,000
Management Fees	%of total revenue	3.0%
Other Overheads (insurances, professional fees etc)	%of total revenue	11%

Table 4.7 : Operational Cost Assumptions.

Drawing on the experience of the project team and comparable projects, the development costs have been calculated as follows:

12 x 2 person elevated demountable sleeping cabins (see Figure 4.8 for a precedent image of this accommodation type) including remote location construction $30,000 per unit equating to a total cost of $360,000

2 x demountable kitchen/dining tent including remote location construction $30,000 per unit equating to a total cost of $60,000

Linking track section day two - section 1.3 northwest to section 3.4 (approximately 2 km) at $50 per metre equating to a total cost of $100,000. Note: this linking track may not be required if an alternate route along Funnels Hut Road can be utilized.

The total estimated project development cost is $570,000. It is important to stress a more robust and detailed analysis of development costs should be undertaken in subsequent analysis.

Figure 4.8 : Standing Camp, Freycinet Escape, Tasmania, designed by Architect David Travalia. Source: www.freycinetescape.com.au

FINANCIAL ANALYSIS

Table 4.8 summarises the indicative financial results for the Wild Walk business concept. A detailed financial model is provided in Table 4.9.

Summary Financial Results	Year 0	Year 1	Year 5	Year 10
	$ 000's	$ 000's	$ 000's	$ 000's
Total Walk Revenue	0	768	1,248	1,792
Total Operational Expenses	(97)	(498)	(798)	(1,119)
Gross Operating Surplus/(Deficit)	(97)	270	450	673
EBITDA Surplus/(Deficit) (Including Development Cost Payback)	(224)	252	204	673

Table 4.8 : Summary Financial Results.

The Net Present Value of the business over a 10 year period is $2.09 million.

The preliminary analysis indicates that assuming a level of debt of 40% over 6 years, the business model is significantly robust to generate a reasonable surplus from year 1 and solid returns from year 6 on. The NPV calculation coupled with an operational surplus from year 1 indicates that the business proposal is sufficiently healthy to warrant further detailed investigation.

Conondale Range Wild Walk
Financial Analysis
Prepared by: HORIZON3
Jun-09

Financial Model Inputs

Expenses	
Food & Beverage cost (% of total revenue)	20%
Admin Payroll (mean salary incl oncosts)	$ 65,000
Administration other expenses (% of total revenue)	3%
Guides Payroll (cost for 2 guides per departure)	$ 1,600
Marketing (% of total revenue)	3.5%
Management Fees (%of total revenue)	3.0%
Fixed Charges (% of total revenue)	5.0%

Financial Inputs	
Value of asset	0
Total construction cost	-$570,000
Loan 1 (Level of debt - 40%)	$228,000
Loan 1 term (years)	6
Level of equity	-$342,000
Cost of debt	8.0%
Unlevered cost of capital (project discount rate)	10.0%
NPV of Project (EBITDA)	**$2,086,499**

		2011 Yr 0	2012(f) Yr 1	2013(f) Yr 2	2014(f) Yr 3	2015(f) Yr 4	2016(f) Yr 5	2017(f) Yr 6	2018(f) Yr 7	2019(f) Yr 8	2020(f) Yr 9	2021(f) Yr 10
Key Financial Drivers	**NPV**											
Walk Days			3	3	3	3	3	3	3	3	3	3
Walk Nights			2	2	2	2	2	2	2	2	2	2
Walk season (Feb - Nov) weeks			40	40	40	40	40	40	40	40	40	40
No. of departures per week			2	2	2	3	3	3	4	4	4	4
Total no. of departures			80	80	80	120	120	120	160	160	160	160
Maximum walkers per departure			10	10	10	10	10	10	10	10	10	10
Maximum capacity (no. of walkers)			800	800	800	1200	1200	1200	1600	1600	1600	1600
No. of Walkers per annum			640	640	640	960	960	960	1,280	1,280	1,280	1,280
Occupancy Rate			80%	80%	80%	80%	80%	80%	80%	80%	80%	80%
Cost of Walk (2009 $)			$ 1,200	$ 1,200	$ 1,200	$ 1,300	$ 1,300	$ 1,400	$ 1,400	$ 1,400	$ 1,400	$ 1,400
No. of guides per departure			2	2	2	2	2	2	2	2	2	2
Project Revenues												
Walk revenue			768,000	768,000	768,000	1,248,000	1,248,000	1,344,000	1,792,000	1,792,000	1,792,000	1,792,000
Total	**$6,820,275**	**-**	**768,000**	**768,000**	**768,000**	**1,248,000**	**1,248,000**	**1,344,000**	**1,792,000**	**1,792,000**	**1,792,000**	**1,792,000**
Operational Expenses												
Administration Payroll		65,000	65,000	65,000	97,500	97,500	130,000	130,000	195,000	195,000	195,000	195,000
Administration Other Expenses		11,520	23,040	23,040	23,040	37,440	37,440	40,320	53,760	53,760	53,760	53,760
Guides Payroll		-	128,000	128,000	128,000	192,000	192,000	192,000	256,000	256,000	256,000	256,000
Food & Beverage cost		-	153,600	153,600	153,600	249,600	249,600	268,800	358,400	358,400	358,400	358,400
Motor Vehicle		-	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000
Supply, servicing & maintenance of standing camps		-	20,000	20,000	20,000	25,000	25,000	30,000	30,000	30,000	30,000	30,000
Equipment		-	15,000	15,000	25,000	15,000	15,000	25,000	15,000	15,000	25,000	15,000
Marketing		13,440	26,880	26,880	26,880	43,680	43,680	47,040	62,720	62,720	62,720	62,720
Management Fees		-	23,040	23,040	23,040	37,440	37,440	40,320	53,760	53,760	53,760	53,760
Additional Fixed Costs		1,920	38,400	38,400	38,400	62,400	62,400	67,200	89,600	89,600	89,600	89,600
Total Operational Expenses	**$4,422,001**	**91,880**	**497,960**	**497,960**	**540,460**	**765,060**	**797,560**	**845,680**	**1,119,240**	**1,119,240**	**1,129,240**	**1,119,240**
Gross Operating Profit	**$2,398,275**	**- 91,880**	**270,040**	**270,040**	**227,540**	**482,940**	**450,440**	**498,320**	**672,760**	**672,760**	**662,760**	**672,760**
Project Finance												
Loan 1		$228,000	-	-	-	-	-	-	-	-	-	-
Loan 1 repayments		-$18,240	-$18,240	-$18,240	-$18,240	-$18,240	-$18,240	-	-	-	-	-
Loan 1 Principle Repayment		-	-	-	-	-	-$228,000	-	-	-	-	-
NPV of Project Finance	-$867	$209,760	-$18,240	-$18,240	-$18,240	-$18,240	-$246,240	$0	$0	$0	$0	$0
Payback on Project Equity		-$342,000										
EBITDA Surplus/Deficit	**$2,086,499**	**-$224,120**	**$251,800**	**$251,800**	**209,300**	**464,700**	**204,200**	**498,320**	**672,760**	**672,760**	**662,760**	**672,760**

Estimated Project Development Costs

	Unit cost	Sub-total
Standing Camp Development		
12 x 2 person elevated demountable sleeping cabins incl remote location construction	$30,000	-$360,000
2 x demountable kitchen/dining tent incl remote location construction	$30,000	-$60,000
Linking track section - section 1.3 northwest to section 3.4 (approx 3 km)	$50	-$150,000
Total Development Cost		-$570,000

Table 4.9 : Detailed Financial Model

4.6 Mary Valley Soft Adventure Precinct

The main strengths of the Mary Valley precinct for nature-based tourism were identified as being:

- local horse-riding events and tours;
- potential recreation trails development;
- possible connection of the Mary Valley Rattler with nature-based tourism experiences; and
- the potential for the Mary Valley to be recognized as a food bowl/farm gate of locally grown and produced foods;

Imbil has developed a reputation as a hub for horse riding with the running of the Easter Endurance event, hosting the Australian Endurance Horse Riding Championships and the Mary Valley Show Rodeo. In addition there are local horse trail riding businesses in the Mary Valley.

There is potential to create an extensive network of recreational trails (e.g. mountain bike riding, walking, horse riding, kayaking) that could capture nature-based tourism interest in the future in the Mary Valley.

The opportunities to improve the revenue generating capacity of the Mary Valley Rattler are currently being investigated by an independent consultant.

The food bowl/farm gate concept is in early stages of development and will need an increase in visitors and marketing to support the development of this product.

The potential to plan, develop and manage a network of trails in the Mary Valley was considered to be the best prospects for developing nature-based tourism opportunities in the near future.

In July 2006 the Queensland Government announced the proposed construction of the Traveston Crossing Dam on the Mary River to assist in meeting the water needs of South East Queensland. Queensland Water Infrastructure Pty Ltd is currently progressing the feasibility and approvals for Stage 1 of Traveston Crossing Dam. A land use and infrastructure planning study was undertaken by the Department of Infrastructure and Planning. It looked at the proposed dam's likely impacts on existing land uses and infrastructure in the Mary Valley, and possible locations for new or expanded land uses and new or relocated infrastructure.

Discussions with Queensland Water Infrastructure Pty Ltd indicated that some 100kms of trails could be developed and when linked to the existing trails in the Sunshine Coast, a network of 400kms may be available in the future.

The assessment of tourism potential[12] identified the potential to create one of South East Queensland's premier outdoor recreation areas by providing opportunities for a number of nature-based tourism activities including:

equestrian trails using local roads and other reserves to surround the impoundment that could connect with the National Trail, jump-off points for the Kilkivan Great Horse Ride and other horse trails within Sunshine Coast Shire;

a number of walking tracks that also linked to State Forest and existing tracks;

mountain bike riding tracks, especially to the east of the proposed dam;

canoe/kayaking trail on the lake and extending downstream to the Mary River;

river based camping and picnicking at developed day-use areas; and

educational and visitor activities that may be associated with the proposed Freshwater Species Conservation and Interpretation Centre[13].

The tourism and recreation mitigations plan identified potential routes for the trails, facility nodes, commercial recreation opportunities and areas that may be available for future eco-tourism development or accommodation.

Many of the proposed horse riding and walking trails have now been ground-truthed and discussed with local users by consultants. In addition independent advice has indicated that mountain bike riding would be a good fit for the terrain and could generate significant visitor interest if developed and marketed strategically[14]. Work has been commenced on the construction of a high

[12] SKM 2008. Traveston Crossing Dam – Environmental Impact Statement, Queensland Water Infrastructure Pty Ltd

[13] The focus of ther centre is to be research, management and education of the freshwater species likely to be affected by the dam e.g. Lungfish, Mary River Cod and Mary River Turtle.

[14] Trails expert Julie Carter – lead development officer for the successful 7 Stanes mountain bike riding areas in Scotland (information from Project Update 8, QWI, Traveston Crossing Dam Project).

quality mountain bike trail to the west of the proposed dam, utilising unemployed persons.

However the on 11 November 2009, the Federal Environment Minister announced his proposed decision to reject the Traveston Crossing Dam Project. This decision does not alter the potential for the Mary Valley to further develop its potential as a recreational trail destination, and the following opportunities are considered appropriate for consideration in the facilitating of nature-based tourism with the trails:

- Building the focus of mountain bike riding activity around the existing mountain bike park, where a high quality trail has been constructed and support facilities may exist for club use.
- Consider the potential for adding in a dirt jump facility at the mountain bike park.
- Consider adding in a skills park involving a range of features and trails for developing mountain bike riding skills.
- Extend the mountain bike riding opportunities to include cross country trails from the existing mountain bike hub to:
    - link with the range of Sunshine Coast Regional Council mountain bike trails based around Kin Kin and to trails at West Cooroy State Forest and to the coast;
    - link back to Amamoor; and
    - extend around the lake to include the proposed public multi-purpose recreation nodes, which will offer facilities to also cater for riders.
- Investigate the scope, given the potential extensive network for shared use trails in the future, and in doing so, the potential for a long distance mountain bike trail that may involve accommodation (e.g. bike huts) or overnight stays in commercial accommodation (e.g. towns, farms).
- Investigate potential for a shared trail between Imbil and Brooloo.

Concept Plan

KEY

Localities

Proposed Public Multi-Purpose Recreation Nodes

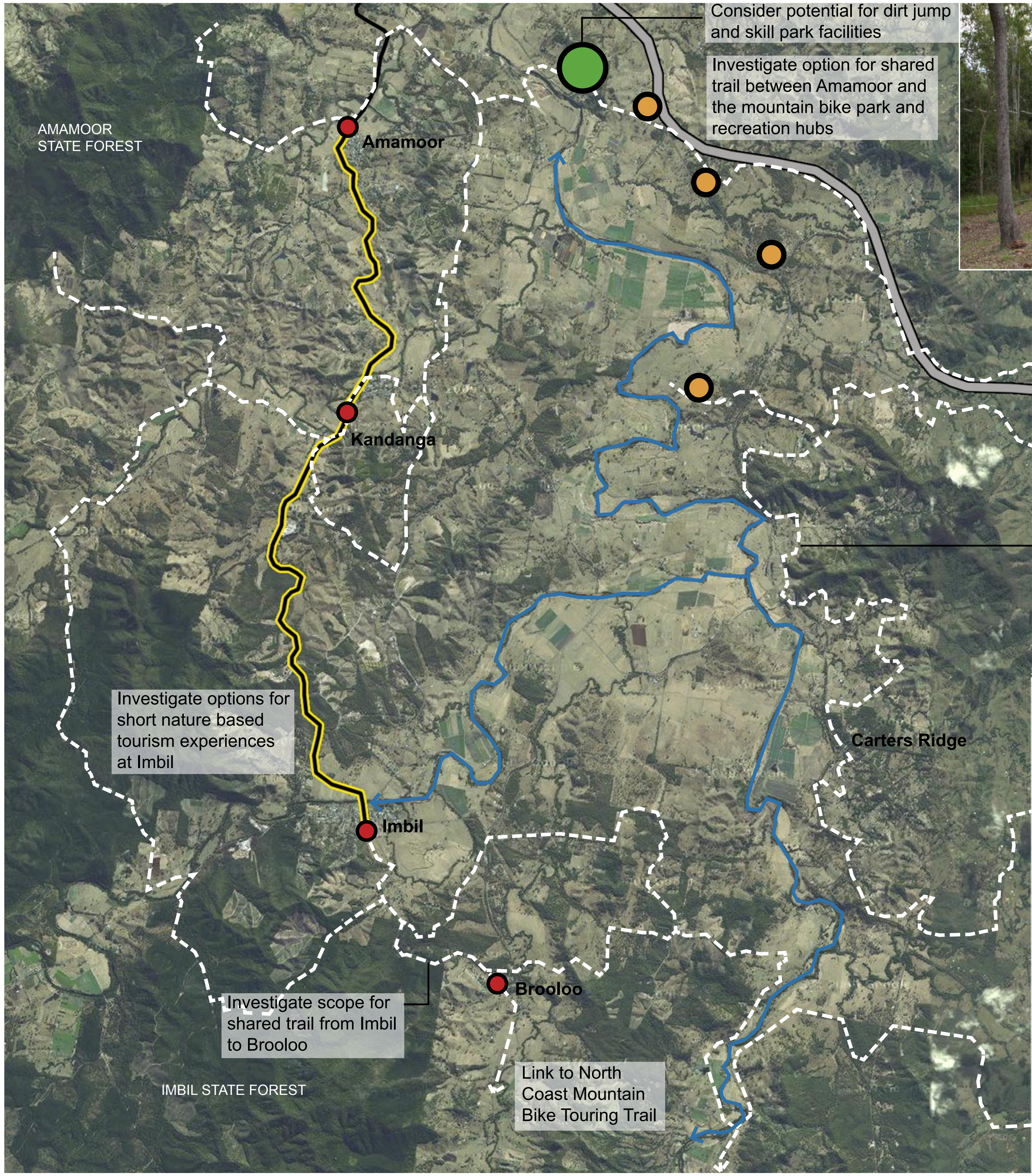
Mountain Biking Park

Proposed Horse & Hiking Tracks

Canoeing / Kayaking

Possible Rail Trail (for further investigation)

Mary Valley Heritage Railway



0 1 2 3 4
Kilometres

Base aerial - Google Maps

Recently constructed demonstration mountain bike trail

Connect mountain bike trail to Sunshine Coast Trail network based around Kin Kin

Assess options for long distance trail bike and horse rides using overnight huts

Investigate options for future trail connections to West Cooroy State Forest and to the coast

View across the Mary Valley

INSPIRING PLACE

July 2009

7. The Mary Valley

Sunshine Coast Hinterland Nature Based Tourism Plan

North

Inspiring Place

Environmental Planning, Landscape Architecture
Tourism and Recreation

Back of plan

Position a major sponsored mountain bike riding event into the calendar to entice a greater awareness of the riding opportunities within the area.

Continue to ground-truth the proposed horse riding and walking trails with key stakeholders including the route alignment, overnight camp locations and siting of facilities to support the trail.

Develop an interpretation plan for the trail network that will deliver thematic messages and information (e.g. trackhead signs) to users at key points using different communication techniques.

Adopt an agreed overall signage and classification system for recreation trails.

Produce a trails map to cater for the different users.

Prepare a marketing plan for the future use of the outdoor educational facility located near the mountain bike park and how such a facility can be integrated with both the nature-based tourism group market and school market at times.

Foster a code of behavior for shared use trails.

Continue to support the horse riding events occurring within the Mary Valley that will also help create awareness of the horse riding opportunities available.

Investigate the potential to add some options for short nature–based tourism experiences into the turn-around time at Imbil on the Mary Valley Rattler.

Support the use of the trails by commercial guided tour operators.

Over time, the network of recreational trails and facilities will have the potential to attract increasing numbers of locals and visitors to enjoy the area. In particular the trails could attract the Social Fun-seekers to enjoy the diversity of trail experiences on offer and the ability to engage in different trail activities at one location. The influx of these users will add to the visitor spend in the Mary Valley and Hinterland through the purchase of goods and services including accommodation, fuel, food and beverage and hire of equipment.

SECTION 5
MAKING IT HAPPEN

This section of the report sets out the basis for implementation of the Sunshine Coast Hinterland Nature-based Tourism Plan, based around four key strategies:

Working together by creating supportive frameworks and partnerships (Section 5.1);

Positioning the Hinterland to be a more sustainable nature-based tourism destination (Section 5.2);

Leading with engaging experiences (Section 5.3);

Delivering effective marketing (Section 5.4).

These Sections provide a list of the key actions that can be taken and the rationale for the action. The focus is very much on the high level or most important actions that will lead to making the Sunshine Coast Hinterland recognised as a stronger destination for nature-based tourism experiences in the future. It is considered that these actions will be the 'leaders' for the whole of the Hinterland and that more localised actions will evolve from these being implemented.

The Action Plans are considered to be working tools and it is recognised that the implementation process may vary over time in response to new opportunities to secure funding, the level of support and commitment from stakeholders, level of investment interest within the tourism industry and the relevant policy framework.

Section 5.5 provides a more detailed action plan for each of the selected best prospects for developing nature-based tourism in the Hinterland.

5.1 Working Together by Creating Supportive Frameworks and Partnerships

A co-ordinated 'whole of industry' approach is required to provide a framework to encourage public and commercial investment in nature-based tourism within the Sunshine Coast Hinterland.

The benefits of such an approach include:

- creating a greater awareness of the importance of nature-based tourism within the tourism industry;
- facilitating investment that supports the brand and marketing position for Queensland and the Sunshine Coast Hinterland;
- supporting public-partnerships;
- reducing the policy barriers for attracting appropriate nature-based tourism development; and
- maximising the returns back to the local community, industry and governments.

The recommended actions for working together by creating supportive frameworks and partnerships are listed in Table 5.1.

Recommended Action	Rationale
1. Conduct communications to promote the SCH Nature-based Tourism Plan and seek active involvement of stakeholders and buy-in to growing this element of the tourism industry in the Hinterland.	Build active support and participation in the implementation of the Plan.
2. Provide an enabling policy environment for nature-based tourism development on the Sunshine Coast Hinterland.	This would provide options for coordinated and consistent approaches to the provision of visitor facilities and services associated with protected areas; approach to tourism operator leases and licences; policies relating to infrastructure and use restrictions within protected areas; and environmental impact and visitor satisfaction research. It will need a review current policies and statutory plans (e.g. planning schemes, management plans) to support diverse and high yielding nature-based tourism products to occur on public and private land.
3. Foster acceptable and preferred partnerships between the public and private sector in the development of nature-based tourism within natural areas.	This will allow better partnership opportunities to occur in the future.
4. Encourage greater levels of collaboration between the local tourism associations in the Sunshine Coast Hinterland	Progress the opportunities to better present the whole of the Hinterland nature-based tourism experiences and to avoid fragmented and duplication of promotion and marketing collateral for the destination.
5. Encourage the Hinterland tourism industry start building stronger business and promotional relationships with key Sunshine Coast attractions (e.g. Australia Zoo), visitor information centres, and operators in key coastal destinations of Noosa, Maroochydore, Caloundra.	Recognise the potential benefits of further developing the cross-selling and referrals to product and services between the coast and hinterland tourism industry.
7. Provide training programs for the local tourism operators about nature-based tourism including customer service standards, the value-adding of thematic interpretation and bundling of product to create more integrated experiences, tour guiding services etc.	Build capacity within the Hinterland tourism industry to develop new or support existing nature-based tourism opportunities.
8. Support development of Indigenous tourism products that can be integrated with nature-based tourism experiences and foster training, accreditation, business skills, marketing and interpretation skills to deliver Indigenous experiences.	Engage with the local Indigenous community (especially the Gubbi Gubbi community) to identify potential integration of nature-based and cultural experiences within the Hinterland. One opportunity may be the potential for using trained Aboriginal guides on the Tibrogargan Circuit Walk.

Table 5.1 Listed Recommendations for Strategy 1

5.2 Positioning the Hinterland to be a More Sustainable Nature Based Tourism Destination

The *Draft Sunshine Coast Regional Tourism Investment and Infrastructure Plan 2008 -18* recognised that the Sunshine Coast Region was renowned for its diverse natural environment and green assets and that market demand for the natural assets will continue to increase, in particular those pursuing outdoor/nature/recreation experiences. It identified the need to facilitate access to significant natural products with the development of 'green' infrastructure to underpin the distinctiveness of the Sunshine Coast Region as a destination.

In the short term the focus will need to be on realising the nature-based tourism potential of the Hinterland with the existing visitor market. In the long term, the Sunshine Coast Hinterland has the potential to become positioned as a more sustainable nature-based tourism destination, but to do so, will require a greater convergence of the tourism and environmental sustainability to meet the expectations of discerning visitors. This particular strategy is about working towards the long term vision of the hinterland becoming a recognised nature-based tourism destination.

International or domestic visitors looking for nature-based tourism experiences are informed opinion-leaders within their own social groups. They are environmentally-conscious and motivated to seek out holiday destinations and products that contribute in a positive way to local, national and global environmental management.

Programs relevant to environmental sustainability may include carbon emissions minimisation and offsetting, biodiversity conservation, active participation in environmental remediation and research programs, and a general commitment to minimising the ecological footprint of the destination or product.

Participation in eco-accreditation systems and best practice initiatives will play an important role in communicating the commitment to sustainability of the Hinterland tourism industry.

There are opportunities to highlight conservation as part of commercial product development, as well as to develop dedicated conservation tourism products. Conservation or volunteer tourism provides a unique, hands-on experience for visitors, including active learning and the chance to make a valid contribution to local conservation. Such programs can make a significant contribution to protected area management, particularly in locations that have limited resources for maintenance and/or ongoing monitoring programs. Conservation tourism has a good fit with the nature-based tourism visitor profile. The potential to develop conservation tourism products should also be explored through partnerships with stakeholders and, potentially, conservation organisations with experience in development of conservation tourism, such as Conservation Volunteers Australia.

Active on-ground site management at key visitor destinations will be important to the long-term sustainability of nature-based tourism within the Hinterland and will necessitate adequate resourcing for land managers such as Queensland Parks and Wildlife Service to manage and maintain the natural assets and facilities.

Operators should be encouraged to obtain eco-accreditation and operate under best practice approaches. Land Managers and the tourism industry should raise awareness of, and actively encourage direct partnerships with commercial operators for activities such as on-ground track or site management of protected areas, monitoring programs, and assistance with physical works or financial contributions to management of key tourism sites. Direct contributions to conservation from the private sector can be an important part of the tourism experience that an operator offers and can be communicated to visitors as a key strength of their product.

The recommended actions for positioning the Hinterland to be a more sustainable nature-based tourism destination are listed in Table 5.2.

Recommended Action	Rationale
1. Increase and encourage the use of sustainable practices to help limit the impact on the natural environment, climate change and loss of biodiversity.	Operators should take a lead in environmental sustainability and adopt practices and initiatives to limit the impact. This will help increase visitor satisfaction and set a benchmark for the rest of the tourism industry to follow.
2. Strengthening partnerships between tourism operators and land managers to enhance sustainability and raise awareness of the eco-image of the Hinterland.	Involve interested commercial operators in on-ground track or site management of protected areas, including monitoring programs (environmental and general park presence), direct assistance with physical works as volunteers, or as part of conservation tourism initiatives.
3. Advocate for adequate resourcing and revenue streams for land managers such as Queensland Parks and Wildlife Service to look after the Hinterland's natural assets,	Essential to allow the capacity to effectively manage and maintain the natural assets and facilities for nature-based experiences in key locations.
4. Support operators to obtain eco-accreditation and implement best practice initiatives.	Important for the tourism operators to be recognised as accredited providers of nature-based tourism products and to remain competitive businesses.
5. Consider the potential for developing dedicated conservation tourism products in the Hinterland.	Recognised as a growing market and there may be scope to incorporate this into the future planning e.g. proposed Freshwater Species Conservation and Interpretation Centre, Conondale Range National Park

Table 5.2 Recommended Actions for Strategy 2.

5.3 Leading with Engaging Experiences

Despite the diverse natural assets, the Hinterland currently has limited developed nature-based tourism product to be recognised as a strong destination for this market. The quality of the nature-based tourism experience needs to be enhanced through the upgrading of existing infrastructure and the potential for new 'leading' products and value-adding components to create a stronger awareness and buy-in.

The selection of leading experiences allows for the allocation of limited resources to create, in the longer term, a critical mass of improvements to the Hinterland nature-based tourism product and hence improve its competitiveness in the market place.

The lead projects have been identified in Section 4 as being:

- upgrading and enhancement of the Tibrogargan Circuit Walk and Ngungun Summit Walk in the Glass House Mountains national Park;
- upgrading the visitor facilities and strengthen the nature-based tourism experience at Mary Cairncross Scenic Reserve;
- developing a zipline attraction at Obi Obi Gorge;
- upgrading the visitor experience and engagement of Mapleton Falls National Park with the social history of the Hinterland community through interpretation linked to the theme of 'living at the edge';
- developing a 3 day 2 night premium guided wild walk product on the Great Walk within the Conondale Range National Park that includes use of standing camp structures; and
- supporting the development of a network of shared trails with potential for nature-based experiences within the Mary Valley, including opportunities for independent and guided mountain bike riding and road cycling.

There are a number of advantages in choosing to lead with these engaging experiences:

- these projects are likely to be a catalyst for encouraging initial market interest and then help support the development of other tourism activities in the future;
- the potential exists for both the public and private sector to invest in the development of the nature-based tourism product;
- the projects build upon the points of difference within the Hinterland that position it strongly within the Sunshine Coast region;
- the potential to disperse the benefits within the Hinterland across each of the selected precincts;
- the potential to educate local communities and businesses on nature-based tourism and its value;

the opportunity for involvement with a wide range of stakeholders in the development of the leading experiences including local government, indigenous people, user groups, conservation bodies and local business;

the opportunity to start integrating and linking these experiences with other products in the Hinterland; and

enhancing the sustainability of managing visitor impacts at these natural attractions.

The recommended actions for leading with engaging experiences are listed in Table 5.3.

Recommended Action	Rationale
1. Develop at least 2 leading commissionable nature-based tourism products within the next 5 years that would attract international and national markets to the Hinterland.	The two best products to be given priority are considered to be the proposed Obi Obi Gorge zipline and Conondale Range Wild Walk. These have the potential to be lead products for packaging and distribution to the travel trade to international and national markets.
2. Invest In the upgrading of visitor experiences and facilities at the selected National Park locations of the Tibrogargan Circuit Walk, Ngungun Summit Walk and Mapleton Falls National Park in line with the concept plans set out in Section 4 of the report and action plan in Section 5.5.	The upgrading of the public infrastructure at these selected locations will create stronger reasons for adding these places into visits and establish some high level nature-based tourism experiences. The products are likely to have strong appeal to Social Fun seekers and Connectors.
3. Upgrade the visitor facilities and strengthen the nature-based tourism experience at Mary Cairncross Scenic Reserve in line with the concept plan and pre-feasibility assessment set out in Section 4 of the report and action plan in Section 5.5.	The proposed upgrading will significantly improve the visitor experience and quality of product at the Reserve with the ability to become a stronger leader product for positioning the Hinterland across all the core markets.
4. Progress the proposed Obi Obi Gorge Zipline proposal to seeking expression of investment interest from the tourism sector in line with the concept plan and pre-feasibility assessment set out in Section 4 of the report and action plan in Section 5.5.	The preliminary pre-feasibility assessment has indicated that this project has good prospects for industry investment. The attraction has the capacity to attract new markets (especially the Social Fun-seekers) to the Hinterland, with direct benefits to the local tourism industry.
5. Progress the proposed Conondale Range Wild Walk to seeking expression of investment interest from the tourism sector in line with the concept plan and pre-feasibility assessment set out in Section 4 of the report and action plan in Section 5.5.	The preliminary pre-feasibility assessment has indicated that this project has good prospects for industry investment. The attraction has the capacity to attract new markets to the Hinterland, with direct benefits to the local tourism industry.
6. Support the planning, development and management of a network of trails that offer nature-based tourism experiences within the Mary Valley in line with the concept plan and pre-feasibility assessment set out in Section 4 of the report and action plan in Section 5.5. This includes the potential to further develop mountain bike riding and road cycling in the Hinterland in the future.	The proposed development of a network of inter-connected multi-use trails that will deliver the potential for new experiences.
7. Encourage the capacity for promoting the step-on and step-off visitor walk experiences on sections of the Hinterland Great Walk with the involvement of accommodation and transport services based in the Hinterland towns.	The Great Walk offers potential for short walks and day walks with the visitors enjoying the comfort of quality accommodation available within the hinterland towns. The packaging of the walk experience with transport services, the option of interpretative guides, fine food/wine, massage/sauna and comfort makes the walk options appealing to a wider choice of market segments.

Table 5.3. Recommended Actions for Strategy 2

Recommended Action	Rationale
8. Support the realignment of the Hinterland Great Walk (especially between Kondalilla national Park and towards Mapleton Falls National Park) to improve the natural experiences.	Currently the Hinterland Great Walk has some very appealing walk sections (e.g. Obi Obi Gorge to Kondalila Falls) and some less attractive sections within the towns. The potential realignment being investigated by QPWS will make the Great Walk more appealing to nature-based tourism visitors and extend the likely stay time and expenditure on the Hinterland.
9. Explore the options to improve public transport links between the Hinterland and coastal towns and within the Hinterland.	Improved transit services will allow greater access opportunities for visitors staying on the Sunshine Coast to reach the Hinterland and then connect to different destinations. The programming of available and possible services would be necessary.
10. Support the development, promotion and marketing of local food and wine products and the bundling of these products with nature-based tourism experiences in the Hinterland.	The dramatic Hinterland landscape and its wide variety of natural locally grown or produced products are a strong element to build into nature-based tourism experiences. This would help provide distinctiveness to the experience and may include the identity of signature products (e.g. cheese, wine, jams, sauces), shopping, farm-gate and visiting produce markets as part of the overall visitor experience.
11. Support events that will help position the Hinterland as a nature-based destination in the minds of the regional community and visitors. e.g. Easter Endurance Ride, Festival of Walks.	Draw on the strengths of traditional local/regional events and festivals and identify the capacity to add new events into a year-long program.
12. Support industry investment for potential development of more environmentally sustainable accommodation within the Hinterland.	There needs to be some highly profiled environmentally sustainable accommodation (e.g. eco-lodge) developed in the Hinterland to strengthen its capacity to offer authentic experiences to the 'pure' end of the nature-based tourism market. This may come from retrofitting of existing accommodation but more likely it will be successful with new development occurring in secluded and inspiring settings with access to a strong activities base. This could occur in the Blackall Range, Mary Valley and Conondale Range precincts.
13. Support the growth in nature-based tour guided services operating within the Hinterland including access to inherent strengths in walking, botanical, horse riding, mountain bike riding, kayaking, rock climbing, four wheel driving, camping, bird watching and fishing.	These guided services will be largely dependent on growing market awareness of the diversity and richness of natural experiences within the Hinterland. Initially it may involve some collaboration with accredited guided operators based outside the Hinterland, but over time, the opportunity to develop such services within the Hinterland should be supported.
14. Encourage tour operator interest in developing a fully integrated one day high premium experience out of the Sunshine Coast market based around the bundling of exceptional experiences including nature, food and wine, culture, shopping and art/craft.	For instance the tour might include all or some of the following elements – one of the Glass House Mountain walks, visiting Mary Cairncross Scenic Reserve (maybe include local providence tasting at the café), meeting an artisan at a workshop/gallery, doing the Obi Obi Gorge zipline and then indulgence with massage/sauna and a signature dinner experience before returning to the coast.

Table 5.3 Recommended Actions for Strategy 3.

5.4 Delivering Effective Marketing

The positioning of the Hinterland as a nature-based tourism destination in South East Queensland will require effective marketing to create a greater customer awareness and perception of the experiences on offer. This is required to improve the competitive position of the Hinterland for both the domestic and international markets.

Most other States and other destinations within Queensland are seeking to strengthen their competitive position through the implementation of nature-based tourism plans, branding nature-based tourism and enabling the development of new experience-rich products to capture market interest. A more integrated marketing approach for the Hinterland with the involvement of Tourism Queensland, Tourism Sunshine Coast, local tourism organisation and individual operators is essential to achieving consistency in communicating messages. If done well, a united marketing effort will expedite the process for raising the perception and awareness of the Hinterland – strong, evocative and brand-informed messages with inspiring images will need to be part of the campaign.

Interpretation is increasingly being recognised as an important way to value-add to the visitor experience. It has a key role in shaping the visitor experience through influencing the way that visitors perceive and connect with the destination. It is not about encouraging a proliferation of interpretive signage but is about a fundamental change to the way the industry understands and works with the power of interpretation in providing quality experiences. Research shows that the most effective way to deliver interpretation is face-to-face. While this suggests the need for guides and guided experiences, it also highlights the need for visitor information staff and service providers such as accommodation and dining operators to understand their function as interpreters and to facilitate cross-referrals and visitor connections that go beyond the service provider's immediate sphere of influence.

The benefit of delivering effective marketing is to:

- strengthen the positioning of the Hinterland and increase the awareness and perception as a nature-based destination in the future;
- position the key leading experiences based around the inherent natural attractions of the Hinterland;

help convert existing visitor markets to incorporate some nature-based tourism experience within their visit or next time visiting, thus adding to the time and spend within the Hinterland;

attract new target markets that are currently not attracted by existing tourism product on the Hinterland but may be triggered by new engaging nature-based tourism experiences;

help increase visitation, improve yield and facilitate opportunities across the whole of the Hinterland in time; and

better know the customer and respond to their needs in the future.

The recommended actions for delivery of effective marketing for nature-based tourism in the Hinterland are listed in Table 5.4.

Recommended Action	Rationale
1. Review the brand position of the Sunshine Coast Hinterland with regard to the evolving Queensland Global brand and Sunshine Coast brand. In particular assess the merits of strongly positioning the Hinterland as the 'green and cool' nature-based tourism destination within the Sunshine Coast region	Fundamental to the positioning of the Hinterland for nature-based tourism experiences. There is potential to recognise the 'pull' of the coastline but to position the Hinterland as the alternative 'break' for all the benefits of nature-based experiences – initially this may be just a day, but over time could be the packaging of the 2-3 day integrated experiences.
2. Undertake an audit of the relevant State, regional and local marketing materials for the Sunshine Coast Hinterland to support partnership collaboration in the Marketing Plan.	The audit should help identify duplication, gaps and opportunities to improve communication of the marketing messages for the Hinterland. It should then help to identify the key marketing collateral available to help position the Hinterland as a nature-based tourism destination in the Marketing Plan. Identify how best to leverage consumer and trade marketing in relation to the core markets for nature-based visitors.
3. Ensure nature-based tourism opportunities are featured in any dedicated website for the Sunshine Coast Hinterland and consider the scope for introducing pre-visit tools e.g. podcast downloads	Review existing website content and consider ways to lift the profile and links to nature-based tourism products or enhance pre-visit information and interest
4. The Hinterland tourism industry support marketing and promotional campaigns for the promotion of the Sunshine Coast as a destination for international and domestic visitors, and in particular the nature-based tourism experiences offer within the Hinterland .	Involvement in such campaigns will help present the positioning of nature-based tourism experiences within the Hinterland to a wider audience.
6. Develop a library of images and film footage for the Sunshine Coast Hinterland that presents its nature-based tourism experiences.	Images help sell destinations and there are limited images available on selling nature-based tourism within the Hinterland
7. Prepare a thematic interpretation strategy for the communication of core messages about the Hinterland experience.	Effective interpretation delivery is best achieved by integrating interpretation delivery across the experience at key visitor destinations within the Hinterland. The media matrix will indicate what techniques to deliver key messages to the different visitors markets.
8. Undertake further research into the Hinterland visitor market using the segmentation model adopted by Tourism Queensland.	There is limited information about the Hinterland visitor market and further information on interests, motivations, values, attributes and lifestyles will help to match the suitability of product within the Hinterland to market needs. Collect baseline data for the destination to enable ongoing monitoring of international and domestic visitor numbers, overnight stays and spend.

Table 5.4 Recommended Actions for Strategy 4

5.5 Action Plans for Best Prospect Projects

The following Table provides a more detailed action plan for each of the selected best prospect projects for developing nature-based tourism product within the Hinterland.

Project	Initiating Actions
Upgrading and enhancement of the Tibrogargan Circuit Walk and Ngungun Summit Walk in the Glass House Mountains National Park	• Discussions with QPWS to seek approval in principle • Reserve impact assessment undertaken to review and revise proposal based on more detailed site assessment by QPWS • Discussions with Gubbi Gubbi community about the proposal and potential for collaboration in interpretation and guiding • Review of cost estimates • Funding for cultural interpretation with Gubbi Gubbi community involvement • Identify budget or other funding sources for commencing works • Seek planning and development approval as required for such works
Upgrading the visitor facilities and strengthen the nature-based tourism experience at Mary Cairncross Scenic Reserve	• Discussions with Sunshine Coast Regional Council to seek approval in principle • Discussions with Education Centre staff • Preparation of a master plan for the whole of the Mary Cairncross Scenic Reserve site to respond to the range of identified management issues and opportunities • Prepare business case for the proposed redevelopment of the visitor facilities • Review of cost estimates • Establish approval pathway and requirements to be met • Identify budget or other funding sources for commencing works • Seek planning and development approval as required for such works

Table 5.5. Actions for the Best Prospect Nature-based Tourism Products

Project	Initiating Actions
Developing a zipline attraction at Obi Obi Gorge	• Discussions with relevant land manager (Water Board) about the project and opportunities to utilise and access land whilst meeting due asset and risk management requirements • Discussions with QPWS about proposal in relation to use of car park and Great Walk facilities • Engage zipline specialist consultants to undertake a review and prepare an operational plan and business case • Undertake initial site impact assessment to determine acceptability of proposed zipline infrastructure and access • Identify approval pathway for the project • Explore different management model options for the construction, operation and management of the zipline attraction • Seek appropriate investment interest or partnership arrangement with public and private involvement • Negotiate terms of lease • Seek planning and development approval as required for such works
Upgrading the visitor experience and engagement of Mapleton Falls National Park with the social history of the Hinterland community through interpretation linked to the theme of 'living at the edge'	• Discussions with QPWS to seek approval in principle • Reserve impact assessment undertaken to review and revise proposal based on more detailed site assessment by QPWS • Review of cost estimates • Engage historian to undertake social history research • Prepare interpretation plan for the site • Identify budget or other funding sources for commencing works • Seek planning and development approval as required for such works

Table 5.5. Actions for the Best Prospect Nature-based Tourism Products

Project	Initiating Actions
Developing a 3 day 2 night premium guided wild walk product on the Great Walk within the Conondale Range National Park that includes use of standing camp structures	• Discussions with QPWS to seek approval in principle • Completion of the Great Walk track and facilities • Reserve impact assessment undertaken to review and revise proposal based on more detailed site assessment by QPWS • Engage consultants to undertake a review and prepare an operational plan and business case • Review of cost estimates • Identify approval pathway for the project • Explore different management model options for the construction, operation and management of the premium walk product • Seek appropriate investment interest or partnership arrangement with public and private involvement • Negotiate terms of lease • Seek planning and development approval as required for such works
Supporting the development of a network of shared trails with potential for nature-based experiences within the Mary Valley	• Review of the proposed recreation trails with consideration to opportunities listed in Section 4 of this report • Prepare a strategic trails plan setting out the priorities for trail development, staging of works, involvement of interest groups, signage, trail classification system, management responsibilities, marketing etc. • Consultation, as required with user groups and tourism industry in the preparation of the strategic trails plan • Identify approval pathway for trails and associated facilities • Identify budget or funding and/or work support schemes to progress the trails • Seek planning and development approval as required for such works

Table 5.5. Actions for the Best Prospect Nature-based Tourism Products

ATTACHMENT 1
AUDIT OF EXISTING NATURE-BASED PRODUCT IN THE SUNSHINE COAST HINTERLAND

NAME	TENURE AND MANAGEMENT	LOCATION	EXPERIENCE	INFRASTRUCTURE/SERVICES
NATURAL ASSESTS				
National Parks				
Glass House Mountain National Park	Queensland Parks and Wildlife Service (QPWS)/Environmental Protection Agency (EPA)	Each of the National Park sections are less than 10km south or south west of Beerwah	• Glass House Mountains Tourist drive and general sight seeing • Viewing and/or climbing the 'iconic' landscape features of the Glass House Mountains (Mount Beerburrum, Mount Ngungun, Mount Tibrogargan and Mount Beerwah) • Bushwalking (short, easier walks and longer, strenuous walks) • Wildlife • Independent climbing (sport and natural) and abseiling (guided climbing may be offered?)	• New Visitor Information Centre in the Glass House Mountains township • Glass House Mountain Tourist Drive • Glass House Mountains Lookout (parking, toilets, picnic and barbeque, some interpretation and information signage within nearby State Forest) • Range of walking trails (ranging from moderate Class 2 to steep and difficult Class 5) • Some interpretation at the lookout (e.g. European history, fire and some Aboriginal cultural information) • Basic park infrastructure (toilets, picnic tables, parking and signage) at Mount Tibrogargan and Mount Beerwah • *Glass House Mountains and Surrounds Visitor Guide* • *Out of date climbing guide for the area* • *More recent climbing information published on various websites* • *Queensland's Parks and Forest brochure (QPWS)*
Kondaliia National Park	QPWS/EPA	4km north-west of Montville	• General sight seeing/lookouts • Group picnic and barbeque area • Water fall (Kondalilla Falls – 90m) • Entry point for the Sunshine Hinterland Great Walk • Short walk to Kondalilla Falls (loop), and half day to Lake Baroon	• Parking, toilets, barbeques and picnic facilities • Walking trails (Class 1 – Class 3) • Some signage and basic interpretation • Sunshine Coast Hinterland Great Walk information panels • *Blackall Range Visitor Guide* • *Sunshine Coast Hinterland Great Walk*

			• Swimming opportunities • Wildlife (five rare and threatened frog species) • Rare bopple nut plant	*Topographic Map* • *Queensland's Parks and Forest brochure (QPWS)*
Mapleton Falls National Park	QPWS/EPA	2km from Mapleton	• Water Fall (Mapleton Falls – 120m) • Cantilevered lookout • Short nature walk (circuit) • Section of the Sunshine Coast Hinterland Great Walk • Wildlife (known for many bird species, including peregrine falcon, eastern whipbird, and wompoo fruit dove)	• Parking, toilets, picnic and shelter facilities • Cantilevered lookout • Walking trails • Basic signage • *Blackall Range Visitor Guide* • *Sunshine Coast Hinterland Great Walk Topographic Map* • *Queensland's Parks and Forest brochure (QPWS)*
Conondale National Park	QPWS/EPA	from Kenilworth, via the Kenilworth Forest Reserve	• Forest drive and general sightseeing • Bushwalking (short nature walk to half day bushwalks) • Sections of the Conondale Great Walk (under construction) • Water falls (Booloumba Falls) • Wildlife (many rare and threatened species, including the yellow-bellied glider)	• Tourist drive – via Sunday Creek Road (unsealed road with creek crossings) – bridge safety under review • Basic park infrastructure at locations along the length of the tourist drive (e.g. lookouts and short walks, toilets and shelters at Charlie Moreland and Booloumba Creek Camping and Day-use Area) • Some sections of the Conondale Great Walk have been constructed (the completed walk will have three walk in campsites with tent pads, toilets and cooking platforms) • *Upper Mary Valley Visitor Guide* • *Queensland's Parks and Forest brochure*

NAME	TENURE AND MANAGEMENT	LOCATION	EXPERIENCE	INFRASTRUCTURE/SERVICES
Forest and Other Reserves				
Beerwah State Forest	QPWS/EPA	14km north of Beerwah via the Glass House Mountains Tourist Drive	• Glass House Mountains Tourist Drive • One of the few remnants of coastal rainforest in the region • Wildlife (habitat for range of bird species including the wompoo fruit dove, eastern yellow robin, and for the vulnerable Richmond birdwing butterfly)	• Fire/management trails accessible to mountain bikes, and some to trail bikes? • *Glass House Mountains and Surrounds Visitor Guide* • *Queensland's Parks and Forest brochure (QPWS)*
Bellthorpe Forest Reserve	QPWS/EPA	15km north-west of the township of Woodford (southern end of the Conondale Range)	• Waterfalls, rainforest and creeks • Wildlife (endangered and threatened animals) • No formal walking tracks, but visitors walk along the forest roads • Mountain biking, motor cycle touring and 4WD can be undertaken on forest roads, but requires a permit	• Basic picnic facilities • Forest roads • *Queensland's Parks and Forest brochure (QPWS)* • *Glass House Mountains and Surrounds Visitor Guide*
Mary Cairncross Scenic Reserve	Sunshine Coast Regional Council and volunteers	from Maleny	• Remnant sub-tropical rainforest • Wildlife • Easy, short nature walks • Education Centre and rainforest interpretive displays (static), and souvenirs • Expansive view of the Glass House Mountains	• Parking, toilets (wheel chair accessible) picnic and barbeque facilities • Kiosk/café • Playground • 2km walking tracks • '*The Natural Jewel of the Sunshine Coast*' brochure, including maps
Mapleton Forest Reserve	QPWS/EPA	Mapleton Forest Drive starts 2km north of Mapleton	• Forest drive and general sight seeing • Short nature walks • Point Glorious lookout • Water fall (Gheerulla Falls) • Bunya Pine	• Mapleton Forest Drive • Day-use area (toilets, picnic, barbeque, short walks) • Point Glorious (lookout, toilets, picnic facilities and fixed anchors for abseiling) • Gheerulla Trail Bike Area (26km dedicated tracks)

			• Sunshine Coast Hinterland Great Walk • Multiple use reserve, activities include walking, mountain biking, trail bike riding and abseiling • Camping • Cooloolabin Dam (fishing and water activities)	• Gheerulla Camping area (picnic and barbeque facilities, toilets, water) • *Queensland's Parks and Forest brochure (QPWS)*
Delicia Road Conservation Park (Linda Garrett Park)	QPWS/EPA	2km north of Mapleton	• General sightseeing • Short, easy nature walk (Linda Garrett Circuit) • Section of the Sunshine Coast Hinterland Great Walk • Great Barred Frog (long-term frog monitoring site)	• Walking tracks (Linda Garret Circuit – 700m, Great Walk – 2.4km section) • *Sunshine Coast Hinterland Great Walk Topographic Map* • *Queensland's Parks and Forest brochure (QPWS)*
Kenilworth Forest Reserve	QPWS/EPA	~ 7km south of Kenilworth, or 13 km north of Conondale (within the Conondale Range)	• Forest Drive and general sight seeing • Wildlife (rare and threatened species) • Camping (at four locations) • Multiple activities (walking, mountain biking on 4WD tracks with a permit, 4WD and horse riding) • Range of short nature walks (e.g. Fig Tree Walk and Booloumba Falls Walk) and longer, more strenuous bushwalks (e.g. to the Mount Allen Fire Tower) • Swimming opportunities	• QPWS Kenilworth Office • Charlie Moreland and Booloumba Creek campsites (see below) • Forest Drive lookout • Range of walking tracks and trails

Charlie Moreland Camping Area	State Forest - QPWS	6km south of Kenilworth or 15km north of Conondale	• Open, grassy woodland campsite and day use area • Tent and caravan/motorhome camping • Suitable for group camping • Permit required ($4.85) • Little Yabba Creek walking circuit and connection to the Mount Allan Hiking Trail	• Fire places, water, toilets (wheelchair accessible), and showers • Horses permitted (large fenced paddock provided)
Booloumba Creek Camping and Day-use Area	Forest Reserve – QPWS/EPA	7km south of Kenilworth or 14km north of Conondale	• Three separate camping areas along the Booloumba Creek • Intimate campsites in rainforest (sites 1 and 3) • Open, grassy campsite suitable for group camping • Links to the Gold Mine Walk along Booloumba Creek	• Toilets, fire places, water • Cold showers at site 1
Amamoor State Forest	QPWS/EPA	30km south-west of Gympie	• 'Working forest' – produces "some of the finest hoop pine in Queensland" • Plantations of hoop pine and bunya pine • 120 known bird species • Day use and camping area • Short walks – Platypus Walk (300m return), Cedar Grove Rainforest Walk (huge red cedar and fig trees) • Mountain bike/cycling opportunities (fire trails?) • Hosts the annual National Country Music Muster	• Toilets, water, picnic facilities, tent and caravan/motorhome camping • Walking trails

NAME	TENURE AND MANAGEMENT	LOCATION	EXPERIENCE	INFRASTRUCTURE/SERVICES
Lakes				
Lake Baroon/Baroon Pocket Dam – Northern Entrance	Water Authority	2km from Montville	• Day use facilities • Fishing (electric motor boats only), sailing and canoe/kayaking, swimming? • Connection to walking trails, including the Sunshine Coast Hinterland Great Walk • Local accommodation provider hires kayaks/canoes • Potential to do a day walk loop, using the Great Walk trail, and including Kondalilla Falls and the Obi Obi Gorge • Permitted recreational activities currently under review	• Picnic and barbeque facilities, toilets, shelter • Playground, boat ramp/s • Connection to walking trails • Lake-side accommodation houses
Cooloolabin Dam	Water Authority	north of Mapleton on the Mapleton Forest Drive	Fishing	Day use facilities?
Lake Borumba	Water Authority	south-west of Imbil	• Camping, fishing, water sports (e.g. water skiing), swimming • Walking and cycling opportunities (fire trails etc)	• Privately operated caravan park at nearby Derrier Flat • Basic day and overnight facilities (e.g. toilets, picnic and barbeque facilities) • Boat ramp/s
ATTRACTIONS				
Australia Zoo	Private/commercia l	Beerwah (Glass House Mountain Precinct)	• Australian native and exotic animals • Opportunities to experience animals up close (e.g. 'Wondering Wildlife Program' and interactive exhibits) • Fun, practical learning, with a wildlife conservation focus • Range of programs, including: • Kids Zoo: farm yard tours for kids	• 'Crocoseum':5000 seat stadium • Adventure Playgrounds • Four retail outlets (Crocoseum Shop, Croc Lair Shop, Australiana Shop, Kids Corner) • Three eating facilities • Photolab • Information Desk • Wildlife Hospital (services local region)

			• Steve's Safari Shuttle Tour • Live Shows • Opportunities to contribute to conservation through joining the Wildlife Warrior program	
TOURS	**Cost**	**Location**	**Experience**	**Infrastructure/Services**
Sunshine Coast Off Beat Rainforest Tours (guided 4WD tours) Eco Tourism Advanced Accreditation Excellence in Tourism Award Environment Council Eco Tourism Award S.C Environmental Council Eco Tourism Award	Adult: $155 Child: $100 (includes morning tea and gourmet lunch)	Conondale National Park (tour appears to be based out of Noosa Heads)	Day Tour: • Travel to the Conondale Range for morning tea • Travel through the National Park (via Forest Drive) and learn about the biodiversity of the area • Guided walk in the National Park with optional swimming • Gourmet lunch in the rainforest (local cheeses etc) • Visit 'pristine' area not promoted to the general public for afternoon tea	• 4WD vehicles • Gourmet lunch, morning and afternoon tea • Eco-accredited guide
Mystic Mountain Tours	Various	Based in Maleny, but servicing broader hinterland, as well as pick up from the Brisbane Airport.	Personalised tours of the Sunshine Coast Hinterland, including: • Bushwalking and Nature • The Sunshine Coast Hinterland Great Walk (transfer, and guided day walks) • Kayaking (Lake Baroon) Other tours: • Wine and Gourmet, Galleries and Artists, Shopping, Markets, Nurseries, Gardens, Golf, Sports Events, Music and Entertainment	• Deluxe mini coach • Work in partnership with other operators in the Hinterland (e.g. Cloud Nine Accommodation)
Montville Hinterland and Rainforest Tour (Storey Line Tours http://www.storeylinetours.com.au/montville_hinterland_tour.htm)	Adult: $84 Conc: $79 Child: $49 (includes Devonshire Tea)	Eumundi and Blackall Range	• Departs the Sunshine Coast, to Eumundi Markets and Dulong Lookout for coastal views • Travel to Montville for shopping and sight seeing • Guided walk in the Mary Cairncross Scenic Reserve	• Mini coach • Devonshire Tea

	Guided rainforest walk is an additional cost		• Walk and swim in the Kondalilla Falls National Park (optional) • Return to the Sunshine Coast	
Mary Valley Adventure Trails (guided horse riding tours)	south-west of Gympie	Mary Valley (including Lake Borumba)	Two day ride has a optional trip on the Valley Rattler	•
Valley Rattler Steam Train Tour (Storey Line Tours - http://www.sunshinecoast-australia.com/sunshine-coast-valley-rattler-steam-train.html)	Adult: $114 Conc: $109 Child: $70 (includes lunch)	Mary Valley	Day Tour: Departs Sunshine Coast, mini coach transfer to Gympie Travel to Imbil on the Valley Rattler Steam Train or lunch Travel via mini coach to Kenilworth (cheese factory and gallery) Little Yabba Creek Rainforest Walk to view the fig trees Return to the Sunshine Coast via mini coach	• Mini coach • Hot lunch and wine/other beverage
Noosa Hinterland Tours	Adult:$79 Seniors: $75 Child: 35	Montville and the Blackall Range	Montville in Style: • Day tour • Eumundi Markets • Dulong Lookout • Montville (rainforest walk and swim at Kondalilla Falls optional) • Flame Hill Winery • Mary Cairncross Scenic Reserve and views of the Glass House Mountains (guided rainforest walk) Hinterland Wine Tasting: Day tour Three Hinterland wineries Morning tea at Mary Cairncross Scenic Reserve and views of the Glass House Mountains Lunch at Montville Maleny Cheese Factory	Mini coach Include morning tea, wine tasting, guided walk

ATTACHMENT 2
ASSESSMENT OF THE SUNSHINE COAST REGIONAL TOURISM INVESTMENT & INFRASTRUCTURE PLAN PROJECTS

Summary

Project	Assessment
Hinterland skywalk attraction	There are a number of major limitations with the proposed skywalk at Obi Obi Gorge. Preliminary research, review of the feasibility study and benchmarking of similar attractions in Australia indicated that it is highly unlikely that any private or public entity could develop a favourable business case to support the investment required. A zipline attraction was assessed as an alternative project (refer to Section 4.3) that reduces the investment risk and offers greater appeal to the core target markets.
Hinterland eco-lodge	There is a range of accommodation available within the Hinterland, albeit not many places fully developed as eco-lodges. It was considered that the private sector would respond to market need in the future as evidenced by Spicers Clovelly Estate being opened in late July. The new lodge will be marketed and promoted along with other award-winning retreats, Spicers Peak Lodge on Queensland's Scenic Rim and Hidden Vale in South East Queensland Country. There are also investigations into the possibility of introducing a Hidden Peaks guided walk along part of the Great Walk and possibly private land. It was considered that a pre-feasibility for an eco-lodge was not a priority at the current time and that it would be better to focus on the nature-based tourism activities in the Hinterland that would support investment in eco-lodges in the future.
Hinterland nature based tourism drive routes	There are five promoted discovery drives developed and promoted within the Sunshine Coast Hinterland. Currently the drives sit in isolation from one another and few make strong connection with the key entry points into the Hinterland. The opportunity in the longer term to consolidate these drives into one marketed 'iconic' drive for the Hinterland will be identified in the Action Plan. It was considered that preparing a pre-feasibility assessment for the Hinterland drive routes was not a priority.
Coastal Green Trails including the Great Walks and the Coastal Pathway	The Sunshine Coast Hinterland has the Great Walk (58kms in the Blackall Range) and the construction of a second Great Walk is taking place within the Conondale Range National Park. The first has appeal for the step-on step-off experience utilising the available accommodation, tours and services. The Conondale Range National Park is more remote, physically demanding and suited to the development of a premium walking product. A pre-feasibility assessment was undertaken for developing a premium walk product in the Conondale Range National Park (refer to Section 4.5).

1. Hinterland Skywalk Attraction

Of the catalyst projects identified, the skywalk has substantial history with regard to development and profile amongst key stakeholders. In late 2003 the Blackall Range Business and Tourism Association (BRBTA) released its Skywalks of the Obi Obi Gorge Project Feasibility Report. The report presented concept, environmental, engineering and financial details for a walking product comprising walking trails, raised boardwalks and bridges forming a circuit of approximately 3km. The design feature of the proposal was a 200m long, 50m high bridge spanning the Obi Obi Creek adjacent to the spillway at Lake Baroon. The concept also included a visitor centre for food and beverage and retail sales as well as interpretation. Additional car parking and visitor amenities were also included in the proposal.

The proposed siting of the project, predominantly within the Kondalilla Falls National Park, was inconsistent with State Government policy and legislation regarding commercial developments in protected areas. Consequently the project was not supported by government and further work not undertaken.

Members of BRBTA remain enthusiastic about the viability of the proposal and the benefits such an attraction would bring to the region. Initial consultation with the land managing agency, Queensland Parks and Wildlife Service (QPWS), indicated reservations with the proposal and approval processes under current policy.

A site visit was undertaken during the audit process in conjunction with BRBTA, QPWS, Tourism Queensland, Tourism Sunshine Coast, Sunshine Coast Regional Council and other representatives. The consultant team identified the following aspects from the site visit:

> the overall arrival experience to Lake Baroon is not conducive to an 'iconic' nature-based tourism experience given the close proximity to Montville, extension of rural residential living along the entry road, Lake Baroon is not natural but man-made, existing development focussed as a recreational site;
>
> the naturalness of the beginning of the proposed walk is marred by the spillway;
>
> existing car parking facilities would have to be increased to cater for any increased level of visitation and possible tour bus use;
>
> Obi Obi Gorge is of scenic interest but is not outstanding as a natural feature (when compared to other natural features or skywalk locations developed in Australia) to possibly support a commercial attraction;
>
> there would be a range of land management issues involved with construction of new walking tracks and mitigating potential impact on the natural values;

the potential impacts of the structure, walks, signage and other infrastructure on the natural experience of those undertaking the Great Walk (currently one of the most popular sections to Kondalilla Falls National Park); and

the potential high risk for public or private investment in the infrastructure to generate sufficient and sustained market interest in future years.

Preliminary research into the merits of the skywalk proposal included comprehensive benchmarking analysis of existing tree top walks within Australia and a critique of the Obi Obi Gorge Project Feasibility Study. The benchmark matrix is located in Appendix 1.

The findings from the benchmarking include:

- Questioning whether the "wow" factor of the proposed Obi Obi Gorge location is comparable to the benchmark canopy walks, in particular MaMu, the Valley of the Giants and Tahune.

- Recognising that since 2003, three new tree top walks have opened nationally – MaMu most recently, the Illawarra Fly in 2008 and the Otway Fly in 200 - arguably supply of tree-top walks in Australia at this time has peaked and all the existing attractions offer a strong competitiveness for the visitor market.

- The proposed key feature of the Obi Obi project (the single span bridge 200m long and 50m high) lacks the depth and ingenuity found in the benchmark products and does not provide the vision to excite the next generation of canopy walkers.

- Analysis of the benchmark data indicates that any future canopy walk will require a multi-faceted product offer, which may be rolled out in stages. This is evidenced by additional features being added to existing products, which diversify its market appeal and encourage repeat visitation. For example the addition of suspension bridges and the cable hang glider at Tahune, the Wilderness Discovery Centre at the Valley of the Giants, and the Tamborine Rainforest Skywalk, opened in March 2009. There is an ongoing requirement to invest in the attraction and add other dimensions to encourage new and repeat visitation – the Obi Obi Gorge area has considerable limitations as to the feasibility of future investment related to nature-based tourism.

- That the public sector built and operates 3 of the 6 canopy walks in Australia indicates that financial viability is not assured.

- The visitation forecast provided in the Obi Obi Gorge Feasibility Study, is atypical in its steady growth over time. A bell curve, which reflects the lifecycle of the product is more likely and would impact negatively on cash flows and ROI.

- There is no annual capital works allowance in the Obi Obi Feasibility financials to refresh the product and provide diversified features overtime, this would also negatively impact on the project's cash flows and ROI. It is expected that the capital costs would have increased substantially since the original costings that were undertaken.

On the basis of these findings and current knowledge of the natural features of the Hinterland, it is considered that the proposal for a skywalk is not one of the best prospects for nature-based tourism in the Hinterland. At this stage, the concept has major limitations that do not warrant further investigations regarding the identification of a new location and associated feasibility analyses within the Hinterland at this time.

Whilst the proposal has generated some interest as a possible iconic attraction for the Hinterland, it is considered to be highly unlikely that any private or public entity could develop a favourable business case to support the investment required.

Australian Skywalk Benchmarks
Prepared by: HORIZON3
Mar-09

No.	Name	Location	Land Tenure	Proximity to Major Population Centre (km)	Destination or Supporting Attraction	Yr. Opened	Admission Fees ($)	Unique Selling Point	Key Components								Project Proponent	Estimated Construction Cost ($)	Operated By:	Estimated Visitation (pa)	Operating Revenue	Operating Surplus
									Elevated Walkway (m)	Height of Walkway (m)	Boardwalks (m)	Walking Tracks (m)	F&B	Retail	Interpretation	Other						
1	Tahune Airwalk	Tahune Forest Reserve, Tasmania	Tahune Forest Reserve	90km & 90 mins south of Hobart	Destination	2000	Adult $22.00 Child $10.00 Family $45.00	A unique location featuring the confluence of the Huon & Picton Rivers bounded by aweinspiring forest	500m	27m (cantilever 48m above river level)	2 x suspension bridges (62m & 70m above rivers)		Yes	Yes	Enroute didactic interps & visitor centre	Serviced & non-serviced campsites. Fishing & rafting & cable hang gliding.	Forestry Tasmania	NA	Forestry Tasmania	150,000 - 180,000		
2	Valley of the Giants Tree Top Walk	Valley of the Giants, Western Australia	Walpole-Nornalup National Park	420km ex Perth, proximate to Walpole	Destination	1996	Adult $8.00 Child $4.00 Family $22.00	A canopy walk highlighting the magnificent red tingle tree.		38m			Yes	Yes	Enroute didactic interps & visitor centre	New Wilderness Discovery Centre	Dep't of Conservation & Land Management (CALM)	$1.8m	CALM	190,000	$1.7m	$800,000
3	Otway Fly Tree Top Walk	Otway Ranges, Victoria	85 ha of freehold abutting the Great Otway NP	2.5 hrs ex Melbourne, proximate to Geelong & Apollo Bay (approx 45 mins)	Supporting attraction	2003	Adult $19.00 Child $9.00 Family $49.50	The Otway Fly tree top walk is the world's longest and highest.	600m	25m (45m observation tower)	incl	1300m	120 indoors & 110 outdoors	Yes	Enroute didactic interps - indigenous theme & visitor centre	Proximitate to the GOR, Apollo Bay, Triplet Falls & Turtons Track scenic drive	Private	$6.5m	Private	170,000	Est. $4.5m	NA
4	Illawarra Fly Tree Top Walk	New South Wales, South Coast	40ac of freehold	200km ex Sydney, proximate to Wollongong	Supporting attraction	2008	Adult $.00	Nestled amongst the temperate rainforest of the Southern Highlands the Treetop Walk takes you along the picturesque Illawarra escarpment and offers inspiring views from Bass Point in the South to Bundeena in the North, taking in Wollongong, Lake Illawarra and the Tasman Sea.	500m	25m	incl		120 indoors & 110 outdoors	Yes	Enroute didactic interps & visitor centre	Access to the plateau via steam train - comparable to Kuranda Railway experience	Private	$6.5m	Private	NA	NA	NA
5	MaMu Rainforest Canopy Walkway	Wooroonooran National Park , North Queensland	NP, within the Wet Tropics World Heritage Area	115km south of Cairns and 30km north-west of Innisfail	Destination	2009	Adult $20.00 Child $10.00 Family $50.00	Explore the forest from the forest floor to the canopy in comfort and safety - infrastructure highlights include cantilever, elevated walkway & observation tower	350m	15m (37m observation tower)	750m	1100m	No	No	Enroute didactic interps		Environment Protection Agency (EPA)	$10m	EPA	NA	NA	NA
6	O'Reilly's Tree Top Walk	Adjacent to Lamington NP in the Gold Coast Hinterland, South Queensland	Freehold	2 hrs ex Bne	Supporting attraction	NA	Free of charge	Claims to have been the first "canopy walk" in the world. Provides a point of interest for day and overnight visitors to the guesthouse + the region.	180m	15m (2xobservation decks @ 30m)	300m		Yes	Yes	Limited	On site accomodation	Private	NA	Private	NA	NA	NA
7	Obi Obi Gorge Skywalk*	Obi Obi Gorge, Sunshine Coast Hinterland, South Queensland	Water Board & NP	1.5 hrs ex Bne	Supporting attraction	NA	Adult $8.00 Child $6.00 Family $22.00	Proposed	200m	50m high bridge spanning the creek	700m	3000m	Yes	Yes	Enroute didactic interps & visitor centre	Adjacent to Lake Baroon & the spillway	Private	$5m	Private	250,000 growing to 360,000 by yr 10	$2.12m growing to $3.89m in yr 10	$800K growing to $2.2m by yr 10

Notes
Data sourced from published materials and consultants own material
* Information source for the Obi Obi Gorge Skywalk is the Feasibility Study 2003

2. Hinterland Eco-lodge

Whilst there is an abundance and diverse range of accommodation in the Blackall Range Lifestyle Adventure Precinct, there does not appear to be any product within the Hinterland, which demonstrates all the critical success factors of a true eco-lodge. The existing accommodation is primarily made up of 'bed and breakfast' establishments and motels with an average star rating of 3-4. Whilst there are some higher quality accommodation establishments, these are often small scale and associated with weddings, short-break escape and indulgence markets.

The Sunshine Coast RTIIP identified a number of key opportunities in their SWOT Analysis (Section 4) which support further exploration into the feasibility of an eco-lodge development, these include:

- provision of a diverse range of tourism products and activities including eco-tourism, adventure and family product to cater for existing and emerging markets;
- positioning the Sunshine Coast as a world leader in sustainable tourism;
- strong natural attractions, which lend themselves to product development opportunities, including, experience based nature attractions and activities;
- development of a variety of accommodation options to meet the needs of individual target markets;
- investment in protection and preservation of natural attractions; and
- green infrastructure development to meet the region's aspirations for sustainability.

These opportunities are supported and need to be addressed in any future eco-lodge development. There are indications of industry investment into eco-lodge style development with the Spicers Clovelly Estate being opened in late July and being marketed and promoted along with other award-winning retreats of Spicers Peak Lodge on Queensland's Scenic Rim and Hidden Vale in South East Queensland Country.

A pre-feasibility for an eco-lodge was not considered a priority at the current time and that it would be better to focus on the nature-based tourism activities in the Hinterland that would support investment in eco-lodges in the future.

For instance, the initial research and site visits looking at the Hinterland's natural assets and existing product would suggest that the Conondale Range National Park Nature-based Tourism Precinct would offer scope for a future eco-lodge development. The eco-lodge could be located outside the National Park and provide the base to explore the diverse range of outdoor activities accessible within the precinct. The remoteness of this precinct and its largely untouched environs are particularly well suited to the requirements of an eco-lodge project. However, other possible sites within the Mary Valley Soft Adventure Precinct may be worthy of investigation by the private sector in the future. Such assessment should include:

- identification and availability of an appropriate parcel of land for an eco-lodge development;
- access to quality nature-based activities from the location;
- an assessment of the availability of supporting infrastructure, utilities and transport connections;
- implications of Council planning scheme guidelines; and
- indicative viability of the proposed development.

Benchmark properties, which will inform the eco-lodge pre-feasibility include, but are not limited to the following:

- Six Senses Resorts (Asia Pacific)
- Southern Ocean Lodge (Kangaroo Island)
- Bothfeet Walkers Lodge (Great Ocean Road)
- Cradle Mountain Huts (Overland Track, Tasmania)
- Daintree Eco Lodge (Far North Queensland).

Whilst the feasibility assessment for a proposed eco-lodge was not undertaken as part of this project, there is potential value for undertaking more detailed analysis of different accommodation needs and opportunities within the Hinterland in the future.

3. Hinterland Nature-based Tourism Drive Routes

Adopting a Precinct based approach to the Sunshine Coast Hinterland (refer to concept Map 3.1 and Table 3.3) will provide a strategic and functional framework for the industry to consider.

It is understand that over 80% of domestic visitors to the Sunshine Coast region arrive via private or rented vehicle, with the region becoming the second most popular destination in Queensland for touring visitors (*Sunshine Coast Regional Update, Tourism Queensland 2005*).

Whilst the existing drives have interest, none have the capacity to generate strong market awareness or a 'must do' response like other successful tourism routes such as the Great Ocean Road in Victoria. Currently, the drives sit in isolation from one another and few make strong connection with the key entry points into the Hinterland, especially from the core markets of the Sunshine Coast and Brisbane.

Embracing the existing tourist drives within the proposed tourist precincts, there is an opportunity in the longer term to look at marketing a consolidated experience which links key natural areas, cultural sites, visitor attractions and experiences, accommodation options and visitor facilities throughout the Sunshine Coast Hinterland.

In the short to medium term it is logical to enhance the existing product by improving signage and promotion of the Precinct-based touring routes; particularly extending into the Mary Valley, including Kenilworth and the Conondale National Park. Adopting this strategy initially will greatly assist in the establishment and communication of the Precinct based approach to the Hinterland.

In conclusion it was not considered a priority to prepare a pre-feasibility assessment for the Hinterland drive routes.

4. Coastal Green Trails including the Great Walks and the Coastal Pathway

The Great Walks of Queensland is a $10 million Queensland Government initiative, each walk offers a range of experiences, from short, easy strolls to half and full-day walks and extended overnight adventures through some of the state's most beautiful natural areas. The Sunshine Coast currently has one commissioned Great Walk - the Sunshine Coast Hinterland Great Walk, a 58km walk through the Blackall Range (refer to Map 3.1) and a second Great Walk, which is under construction, through the Conondale Range.

The two Great Walks within the Sunshine Coast Hinterland offer quite different opportunities for the industry to leverage and quite different experiences for the visitor. The proximity of the Sunshine Coast Hinterland Great Walk to a range of local accommodation places, the distance of specific sections of the track and the level of difficulty of the track support the walk on-off visitor market. The primary opportunity moving forward, particularly for the Blackall Range Lifestyle Adventure Precinct, is for local accommodation providers to package short breaks with a focus on walk on walk off experiences.

Additional opportunities, which exist with regard to the Sunshine Coast Hinterland Great Walk include:

- further investigation of appropriate linkages and transport options for access to the Sunshine Coast Hinterland Great Walk, including public and private transport to parks and trail heads and shuttle buses throughout the hinterland area;
- encouraging commercial tour operators to deliver walking experiences and associated interpretive product on the walk;
- identification of further infrastructure required along the Great Walk to better service the needs of the short break market;
- further promotion of the Great Walks through STO, RTO, LTOs and VICs; and
- integration of the Great Walks with other regional recreation, cycle and walking trails currently being developed at a more localised level, including alignment with the Coastal Pathway initiative and other key green initiatives.

Construction of the Conondale Range Great Walk is due for completion in 2010. This walk traverses a more remote and isolated range; the experience will be more physically demanding and require greater planning and commitment in terms of time and effort. The more remote and ‘wild’ location of the Conondale Range Great Walk is potentially well suited to developing a premium walking product, such as the Cradle Mountain Huts, Bay of Fires or Maria Island Walks in Tasmania.

It is recommended that pre-feasibility investigations be undertaken for a potential premium walking product associated with the Conondale Range Great Walk. Key considerations for this investigation include:

- Identification of the track route and potential overnight sites;
- an assessment of the availability of supporting infrastructure, utilities and transport connections;
- development of a concept for the overnight accommodation facilities, including an assessment of the potential to incorporate the eco-lodge into the product offer; and
- assessing the indicative viability of such a product.

ATTACHMENT 3
PRELIMINARY COST ESTIMATES FOR THE BEST PROSPECT PROJECTS

1. Tibrogargun Circuit Walk - Order of Cost Estimate (-/+25%)

Item	Amount	Unit	Unit $	Sub-total
Relocate track head interpretation	1	item	$ 1,500.00	$ 1,500.00
Reorganise existing track signage for new track direction	1	item	$ 5,000.00	$ 5,000.00
New viewing platforms	3	item	$ 7,200.00	$ 21,600.00
New interpretation	5	item	$ 2,500.00	$ 12,500.00
New signage	3	m2	$ 1,000.00	$ 3,000.00
Sub Total - Above Works				$ 43,600.00
Site preparation 15%				$ 6,540.00
Preliminaries 12.5%				$ 5,450.00
Contingency 15%				$ 6,540.00
Sub-total - Works				**$ 62,130.00**

Capital Costs Total (ex gst) **$ 62,130.00**

Excludes consultant fees / reports

2. Ngungun Summit Walk - Order of Cost Estimate (-/+25%)

Item	Amount	Unit	Unit $	Sub-total
New car park improvements	850	m2	$ 55.00	$ 46,750.00
Extend bitumen seal to access road	260	m2	$ 65.00	$ 16,900.00
Car park drainage	1	item	$ 7,500.00	$ 7,500.00
Wheel stops	28	item	$ 250.00	$ 7,000.00
New feature track (steps / rock retaining etc)	150	Lm	$ 500.00	$ 75,000.00
Erosion gully erosion control rehabilitation	250	m2	$ 350.00	$ 87,500.00
Erosion gully viewing platform	12	m2	$ 750.00	$ 9,000.00
Summit viewing platform	20	m2	$ 500.00	$ 10,000.00
Interpretation	3	item	$ 2,500.00	$ 7,500.00
New signage	4	item	$ 1,000.00	$ 4,000.00
Sub Total - Above Works				$ 271,150.00
Site preparation 15%				$ 40,672.50
Difficulty loading 25%				$ 67,787.50
Preliminaries 12.5%				$ 33,893.75
Contingency 15%				$ 40,672.50
Sub-total - Works				**$ 454,176.25**

Capital Costs Total (ex gst) **$ 454,176.25**

Excludes consultant fees / reports

3. Mary Cairncorss Scenic Reserve- Order of Cost Estimate (-/+25%)

Item	Amount	Unit	Unit $	Sub-total
New 2 story visitor information facilities / café	400	m2	$ 4,500.00	$ 1,800,000.00
Improve carparking vehicle and pedestrian circulation	1	item	$ 200,000.00	$ 200,000.00
Car park drainage	1	item	$ 25,000.00	$ 25,000.00
Misc features (wheelstops / bollards etc)	1	item	$ 50,000.00	$ 50,000.00
New feature entry pavements / forecourt	500	m2	$ 200.00	$ 100,000.00
New plantings	750	m2	$ 45.00	$ 33,750.00
New fences	150	Lm	$ 200.00	$ 30,000.00
New track extension	75	Lm	$ 65.00	$ 4,875.00
Interpretation upgrade throughout reserve including new building	1	item	$ 300,000.00	$ 300,000.00
New signage	8	item	$ 2,500.00	$ 20,000.00
Option - Potential 120m long canopy tree walk	120	Lm	$ 1,500.00	$ 180,000.00
Sub Total - Above Works				$ 2,743,625.00
Site preparation 15%				$ 411,543.75
Preliminaries 12.5%				$ 342,953.13
Contingency 15%				$ 411,543.75
Sub-total - Works				**$ 3,909,665.63**

Capital Costs Total (ex gst) **$ 3,909,665.63**

Excludes consultant fees / reports

4. Obi Obi Gorge Zipline - Order of Cost Estimate (-/+25%)

Item	Amount	Unit	Unit $	Sub-total
New 2 story ticketing facilities / kiosk	75	m2	$ 2,500.00	$ 187,500.00
Family zipline (8 landing platforms - 500m long)	1	item	$ 850,000.00	$ 850,000.00
Extreme Zipline (2 landing platforms - 500m long)	1	item	$ 300,000.00	$ 300,000.00
New track (steps / retaining etc)	150	Lm	$ 500.00	$ 75,000.00
Viewing platforms	4	items	$ 7,200.00	$ 28,800.00
New feature hard pavements / forecourt	150	m2	$ 200.00	$ 30,000.00
New signage	8	item	$ 2,500.00	$ 20,000.00
Sub Total - Above Works				$ 1,491,300.00
Site preparation 15%				$ 223,695.00
Difficulty loading 15%				$ 223,695.00
Preliminaries 12.5%				$ 186,412.50
Contingency 15%				$ 223,695.00
Sub-total - Works				**$ 2,348,797.50**

Capital Costs Total (ex gst) $ 2,348,797.50

Excludes consultant fees / reports

5. Mapleton Falls National Park - Order of Cost Estimate (-/+25%)

Item	Amount	Unit	Unit $	Sub-total
Bus parking / turning	35	m2	$ 85.00	$ 2,975.00
New parallel parking	150	m2	$ 85.00	$ 12,750.00
Drainge	1	item	$ 25,000.00	$ 25,000.00
New pavements	180	m2	$ 150.00	$ 27,000.00
New interpretation	2	m2	$ 5,000.00	$ 10,000.00
New platform design with greater extension (20m)	1	item	$ 500,000.00	$ 500,000.00
Sub Total - Above Works				$ 577,725.00
Site preparation 15%				$ 86,658.75
Difficulty loading 15%				$ 86,658.75
Preliminaries 12.5%				$ 72,215.63
Contingency 15%				$ 86,658.75
Sub-total - Works				**$ 909,916.88**

Capital Costs Total (ex gst) **$ 909,916.88**

Excludes consultant fees / reports

6. Conondale Range Wild Walk - Order of Cost Estimate (-/+25%)

Item	Amount	Unit	Unit $	Sub-total
New track	2500	Lm	$ 50.00	$ 125,000.00
Exclusive standing shelters	12	item	$ 30,000.00	$ 360,000.00
Demountable kitchen / dining structures	2	item	$ 30,000.00	$ 60,000.00
Equipment	1	item	$ 25,000.00	$ 25,000.00
Sub Total - Above Works				$ 570,000.00
Site preparation 15%				$ 85,500.00
Isolated location loading 25%				$ 142,500.00
Preliminaries 12.5%				$ 71,250.00
Contingency 15%				$ 85,500.00
Sub-total - Works				**$ 954,750.00**

Capital Costs Total (ex gst) **$ 954,750.00**

Excludes consultant fees / reports

ATTACHMENT 4
HOLLYBANK CASE-STUDY

Tasmania's newest high profile adventure tourism attraction, Hollybank Treetops Adventure provides visitors with a real adventure experience as they glide through the tree canopy in a series of seven stages along a total cable length of 737 metres. It combines outdoor adventure with an appreciation of Tasmania's forest environment.

This award winning nature based adventure tourism attraction is the only continuous cable-guided treetop operation available in Australia and the unique forest canopy tour gives visitors a bird's eye view of Tasmania's beautiful forests and an insight into forest ecology. Guides provide high-quality interpretation developed to create visitor understanding and an appreciation of the forest environment.

The company was created by the partnership of Australian Tree Top Canopy Tours Pty Ltd and Forestry Tasmania – a State enterprise. It is a joint development with an equal sharing of both costs and revenue. The project is managed by a board with two representatives from each company.

Hollybank Treetops Adventures opened in January 2008 and offers a three-hour, hands on experience with an unparalleled adrenalin rush for visitors as they travel through the air at speeds of up to 40kph.

The business is located in the Hollybank Forest Reserve 15 kilometres from Launceston towards Lilydale. It is open 9am-5pm seven days a week, excluding Christmas Day.

About the Experience

Hollybank Treetops Adventures contains a variety of services and facilities including:

- Spacious car park, including parking bays for the disabled immediately outside the centre
- Reception desk where the Hollybank team welcome visitors, check booking details and introduce the two guides assigned to each tour
- High quality point of sale and online booking service – InTouch system
- Lockers are provided where personal effects can be safely stored

Training room where the guides fit harnesses and instruct in the operation of the equipment and the safety procedures of the ride

Simulator frame where practice runs are conducted before the main tour

Walking tracks through the beautiful reserve, such as The Avenue, lead to and from the actual elevated tour.

The ride consists of the following features:

737m of cable woven through the treetop canopy of the Hollybank forest.

Suspended by harness, visitors travel the course stopping at seven specially designed tree platforms or ‘cloud stations’ along the tour

Cloud stations are located from between 15m and 370m apart

Height above the ground varies from 15m to 50m

Highlights of the ride include the 115 m span across the Pipers River, the river 50m below the cable; and the last major section, a 370 m flight along the Pipers River

Interpretation is a feature of the tour with all guides trained in the delivery of forest interpretation and the reserve’s history.

On return visitors can enjoy a drink or snack, relax on the centre’s seating, swap notes on the adventure and view images of the experience (taken by the guides). Toilets and outside amenities such as picnic tables and chairs are also provided. Merchandise such as clothing, souvenirs, food items and digital images of the experience are available to purchase. All the visitor centre facilities can be accessed by visitors even if they do not go on the tour.

The ride is open for all ages and fitness levels and has been enjoyed by children as young as three up to those well into their 80s. It is not physically demanding and doesn't require any special skill to take part. Children under 16 must be accompanied by an adult at all times and there must be one at least one parent adult guardian for every two children participating.

Hollybank Forest Reserve

Accompanying partners who do not take the tour are encouraged to explore the walks and forests of the reserve. There are a variety of walks to choose from including a stroll down 'The Avenue' or the longer 'Walk of Change' or take the side track down to the junction of Butchers Creek and Pipers River. In total, there is approximately 3 hours of walks to be found on the reserve.
In addition, Hollybank Forest Reserve provides free of charge to all visitors the following:

- barbeque and picnic shelters
- recreation ground
- seating in quiet areas
- public toilets
- walking tracks

The area was first settled by timber cutters and mill workers in 1854. The site was once one of the earliest private plantations of European trees in Tasmania and wood from the ash trees was intended to make cricket bats and tennis racquets. Other trees dating back to the 1850s include Douglas firs, Californian redwoods and, of course, holly.

Commencement

Prior to the Hollybank Treetops Adventure project Hollybank was already an established forest reserve with visitors enjoying the recreation facilities provided. Visitor monitoring estimated that approximately 20,000 visitors used the site annually.

Australian Canopy Tours worked closely with Sydney firm Vertical Innovations International (VII) which was hired to design and build the cable system and initially train staff. VII indicated it would take at total of four months to complete the project which included finalising the design and completing the approvals process followed, by a period of two months to undertake the fabrication, and another month to complete the construction.

A Development Application (DA) was lodged with the Launceston City Council in August 2007 and approved unchallenged at the end of August. The total investment to start this venture was $1 million, which included the renovation and conversion of a decommissioned forestry-training centre into the Hollybank Visitor Centre.

Visitor projections between December 07 and June 08 were estimated at 17,530 people. These figures were not realised by June 2008 however issues that affected this aim included a delay in opening scheduled for December due to a malfunction with equipment and replacement parts having to be imported. Current entry fees are $99 for adults and $66 for children. Entry to the forest reserve alone continues to be free of charge.

Future visitation

Launceston is a major gateway into Tasmania and in 2006 attracted more than 428,000 interstate and international visitors to the region. Visits to the state were up six per cent and overnight stays in Launceston and the Tamar region were up three per cent to 322,600 visitors. The outlook to 2010 is for the market to hold at current levels. This market assessment has formed the basis of visitation to Hollybank Treetops Adventure.

The visitor target for Hollybank is expected to grow to 27,000 in 2008/09 and to about 30,000 a year after that. It is estimated the Tasmanian market will also provide a client base and be important to attracting visiting friends and relatives.

APPENDIX 5 - BENCHMARKING OF AUSTRALIAN PREMIUM COMMERCIAL WALKS

Premium Walk and Operator	Walk Features	Accommodation	Departures	Days	Nights	Price per person	Average price per night
VICTORIA							
6 Day Great Ocean Walk, Victoria *Both Feet*	12 Apostles iconic coastal landscape National Park	Luxury accommodation at the new Johanna Eco Lodge	Pre-arranged – one trip per month from January to May	6	5	$2795	$559
The 'Whole' Great Ocean Walk Tour, Victoria *Walk 91*	12 Apostles iconic coastal landscape National Park	One night in an award winning, conservation centre, and other local B and B's.	On request	6	5	$1280	$256
Great Ocean Walk, Victoria EPIcURIOUS	12 Apostles iconic coastal landscape National Park Tailor-made gourmet experience (regional food) In-house massage	Rotten Point House (private accommodation)	From October to February (one trip per month)	4	3	$1820	$606
Wilsons Promontory Grand Explorer, Wilsons Promontory National Park *Parktrek Walking Tours Australia*	Coastal walking – beaches and rocky points Remote areas of the Wilsons Promontory National Park Unique historic lighthouse accommodation	Two nights lighthouse accommodation, two nights Country Lodge	Pre-arranged (e.g. 20th of April 2009 – 24th April 2009)	5	4	$1150	$288
Great Walhalla Alpine Trail, Baw Baw National Park, Victoria *Walhalla Star Hotel*	Australian Alps Walking Track Baw Baw National Park Heritage and nature	Alpine Hotel, bush campsite, Walhalla Star Hotel	October - April	4	3	$980	$326

Premium Walk and Operator	Walk Features	Accommodation	Departures	Days	Nights	Price per person	Average price per night
TASMANIA							
The Overland Track, Cradle Mountain-Lake St Clair National Park, Tasmania Cradle Huts, Bay of Fires Walk	Sub-alpine, alpine ‘wilderness’/remote Cradle Mountain Wildlife National Park World Heritage Area	Private, luxury huts	Daily (non-winter season)	6	5	$2500 ($2600 January, February, March)	$500
Bay of Fires Walk, Mt William National Park, Tasmania Cradle Huts, Bay of Fires Walk	Coastal/beach walking “wilderness coastline” Solitude Aboriginal heritage Gourmet Food National Park Award-winning lodge	One night standing camp, two night in luxury eco-lodge	Daily (non-winter season)	4	3	$1900 ($1950 January, February, March)	$633
Maria Island Walk, Maria Island National Park, Tasmania Maria Island Walk	Feeling of remoteness Island coastal walking Site of significant cultural heritage (Aboriginal, convict, early European industry) National Park	Two nights standing camps, one night in historic residence	Monday, Wednesday, and Friday (daily departures in peak season) Season runs from October to April	4	3	$1950	$650
The Freycinet Experience Walk, Freycinet National Park, Tasmania Freycinet Experience	Iconic coastal landscape ‘blissful isolation’ Award-winning lodge National Park	Three nights in the private, luxury lodges	Pre-arranged dates (weekly) Season runs between November and April	4	3	$2075	$692

Premium Walk and Operator	**Walk Features**	**Accommodation**	**Departures**	**Days**	**Nights**	**Price per person**	**Average price per night**
OTHER AUSTRALIA							
Larapinta Trail, West MacDonnell National Park, Northern Territory *Trek Larapinta – End to End Trek (a range of shorter walks are offered along particular sections of the track)*	Raw natural beauty Rugged ranges Sheltered gorges Semi-desert country Aboriginal and early European cultural heritage National Parks and reserves	Swag/tented camping	On request / expressions of interests	20	19	$3960	$208
Blue Mountain Hiker (5 days), Blue Mountains National Park, Australia *Auswalk*	Towering sandstone cliffs The Three Sisters Waterfalls and lookouts ‘Trails that hug sheer cliff faces’ World Heritage Area National Park	Resort motel	8th May 2009, 28th August 2009 (and as requested)	4	3	$995 (May) $1195 (August)	$332 (May) $398 (August)
Lord Howe Island Walking Holiday, Lord Howe Island, South Pacific Island *Auswalk*	Wilderness island Remote destination National Park World Heritage Area	Pinetrees Resort Motel	7th of September 2008, 5th September 2009	7	6	$2095 (2008) $2195 (2009)	$349 (2008) $366 (2009)
Heysen Trail, Flinders and Gammon Ranges *Australian Walking Holidays (World Expeditions)*	‘Pristine wilderness’ ‘majestic peaks’ Cypress pine forests	Tented camping (vehicle supported)	Pre-arranged dates	7	6	$1895	$316