

# Shoalhaven Tourism Master Plan 2012-2017

## Appendix 4 Special Interest and Activity Based Niche Markets



## Special Interest & Activity Based Niche Market Opportunities

With the attractions, assets and supporting infrastructure available in Shoalhaven City, there is opportunity to build visitation by growing a range of special interest and activity based markets. While it is beyond the resources of the Shoalhaven Tourism Board and Council's Tourism Unit to target each of these markets, there is however opportunity for local tourism and business operators and local tourism and business associations to work together to build special interest and activity based niche markets. Through its local Product Development and Marketing and Promotional funds, the Tourism Board could provide some funding (generally on a dollar for dollar basis) to assist with product and/or market development and/or marketing and promotion. (Note: this funding is currently only available to non-profit organisations such as local Tourist Associations, Chambers of Commerce and industry and community. The Guidelines will need to be changed to provide assistance to commercial operators). Limited funding may also be available under the Destination NSW regional development and marketing programs or through the Commonwealth funded Regional Development Australia and TQual programs.

### **Special Interest & Activity Based Markets to be addressed by the STB over the next 5 years.**

The Tourism Master Plan has identified the following activities and markets as the areas where Council and the STB will be concentrating on over the next 5 years:

- Events – attracting large events (including sporting events) into the City and building a program of locally generated signature events.
- Business events – conferences, meetings and corporate functions.
- Weddings and functions markets.
- Boating and recreational fishing markets – cruising, recreational boating, sailing, canoeing and recreational fishing, including targeting individuals, clubs and associations and attracting and building events.
- Improving product and infrastructure to grow both competitive and recreational cycling and mountain biking across a range of disciplines and activities.
- Improving the walking product available in the City – both to enhance the attraction base and experiences available to visitors and to build the walking and bushwalking markets.
- Building the wine and food sectors.
- Strengthening the cultural and heritage tourism sectors, and supporting initiatives by the local aboriginal communities to develop aboriginal cultural products.

### **Other Opportunities**

Other opportunities are summarised in the following Table, with more detailed information on surfing, wildlife tourism (animals and birds) and motorsports given in the following sections. Information on commercial tour operators bringing groups into the City and on local tour, activity and hire operators is also provided in the last section of this Appendix. The asset / product list in the following Table is not comprehensive.

Activities	Assets / Products	Potential Markets
<b>Water-based activities</b>		
Surfing	Surf breaks Surf schools Events Ocean & Earth Factory Back packer accommodation - Ulladulla	See following section
Kite surfing & wind surfing	Low energy beaches (eg Bendalong) Coastal lakes and estuaries	Recreational kite and wind surfers (primarily Generation X)
Scuba Diving	Dive operators in Jervis Bay & Ulladulla Jervis Bay & Bateman's Bay Marine Parks Bawley Coast – quality shore-based diving Off-shore wrecks Marine life – diving with seals, turtles, giant rays & grey nurse shark area	Recreational divers Dive clubs & associations, including university groups International learn to dive – back packers often do a dive course in the Barrier Reef or around Sydney – opportunity to target this market with Jervis Bay sea life experiences (need to model the product on the Surf Camp at Gerroa) Dive photography – growth market due to increased affordability of digital underwater cameras – opportunities to run dive photography tours which also include photography workshops.
Stand-up Paddle boarding	Commercial operators Quality of the environment / wildlife & sealife viewing opportunities – paddle with the dolphins	Target events and competitions for Jervis Bay
White water kayaking and rafting	Upper Shoalhaven River	Canoe / kayak clubs Soft adventure market
<b>Outdoor Activities</b>		
Nature Based Tourism	Quality environment & beautiful scenery Wildlife & sea life viewing – whales, dolphins, kangaroos, seals, giant rays, grey nurse sharks. Prolific bird life National Parks, Nature Reserves, State Forests, Crown Reserves, plus beaches, estuaries, lakes, rivers etc Walking trails, interpretation, lookouts Nature-based and adventure-based tour operators and activities Geological formations / landforms Wildflowers	See following section – on wildlife tourism
Endurance /	Beaches, lakes and rivers with adjoining national parks, state	Long distance sea kayaking and canoe events

Activities	Assets / Products	Potential Markets
adventure racing	forest and crown reserves	Open water swimming events Iron-man style events Adventure racing events Endurance events – eg Tough Mudder Orienteering & rogaining events
Golf	Golf courses – Shoalhaven Heads, Coolangatta, Kangaroo Valley, Nowra (2), Vincentia, Sussex Inlet, Mollymook (2)	Coordinate tournaments to form a circuit Develop special events – veterans week of golf, junior events, women’s events, events for B&C grade golfers (most events are targeted to golfers on low handicaps) Social golf clubs – out of Sydney and the ACT. The ACT clubs tend to play on the Eurobodalla and Murray Courses. Expand the range of clubs that have reciprocal rights and grow interclub activities and visits. Develop and promote golf – accommodation packages. Corporate golf days / weekends
Bowls	Bowling clubs and greens in most of the towns Open tournaments	Develop tournaments into a local ‘circuit’ and promote to clubs in Sydney, Melbourne and rural towns in South Eastern NSW and eastern Victoria.
Motor sports	New motorsports complex State Forests for off-road rallies	See following section
Car Club rallies’	Range of accommodation Venues suitable for rallies, show & shine, swap meets etc Attractive scenic environment New motorsports complex as a ‘hook’ – also potential to tie in promotional activities to events held at the motorsports complex. Good local drives  Need to offer clubs a promotional kit with suggested drive itineraries, accommodation packages, and information on venues for car events and participant functions.	Car clubs – veteran, classic, model based – more than 2000 clubs in NSW, ACT and Victoria. Club, Chapter, State and National activities and events.  For lists of Clubs see: <a href="http://www.justauto.com">www.justauto.com</a> <a href="http://www.carclubsworldwide.com">www.carclubsworldwide.com</a> <a href="http://www.carpoin.com">www.carpoin.com</a> <a href="http://www.classiccargurus.com">www.classiccargurus.com</a> <a href="http://www.shannons.com.au">www.shannons.com.au</a> <a href="http://www.caronline.com.au">www.caronline.com.au</a> <a href="http://www.ozswaps.com.au">www.ozswaps.com.au</a> <a href="http://www.vmc.org.au">www.vmc.org.au</a> (Vintage cars)
4WD	State Forests in the southern and western areas of the City Primitive camping grounds New Motor sports complex, showgrounds / sports ground that could be suitable for staging events & shows	Tag-a-long tours – targeting external operators to include trips into the Shoalhaven 4WD Clubs – training and social trips Jamborees – eg Jeep Jamboree (attract upwards of 1000 participants) Mud trials (would need a private property to build a ‘pit’).
Biker Groups	Touring routes	Biker clubs and associations

Activities	Assets / Products	Potential Markets
	Accommodation Motor sports complex – as a ‘hook’ – packaging events, club bookings of the course etc. Coastal touring route – to Phillip Island and to events and activities held in the Bombala area.	Individuals / small social groups Charity rides – targeting organisers to consider the Shoalhaven as an ride location Rallies and events  Rides can be developed (ie trip notes, images, etc) can be developed and posted on sites such as <a href="http://www.motorcyclerrides.com.au">www.motorcyclerrides.com.au</a> and through promotional material distributed through motorcycle shops. Roads and Maritime Services will also work with local areas to produce motor cycle touring guides. Articles in motorcycle magazines are still a very effective way of targeting this market.
Trail bikes	State Forest roads and management trails Primitive camping areas	Escorted Trail bike tours – opportunity for a local enthusiast Enduros – State Forests Motorcycle events  List of tour operators available from <a href="http://www.dirtbikeaustralia.com.au">www.dirtbikeaustralia.com.au</a> . Self guided touring routes can also be posted on this site.
Rock sports	Outdoor adventure operators – local and external Locations close to Nowra for abseiling, rock climbing, canyoning	Beginners / introduction – possibly targeting the holiday market for day trip activities Corporate / team building Organised groups – school, church, scouts etc Experienced climbers / abseilers / canyionners
Horse sports	Showgrounds – Berry, Nowra, Kangaroo Valley, Milton State Forests – for recreational riding and endurance events Specialist rider & horse trainers Holiday with your horse operator	Horse owners Riding school (most organise the occasional trip away) Equestrian groups and associations (eg Trail riding clubs) Endurance Events
<b>Other</b>		
Photography	Beautiful environment – diversity of landscapes Range of accommodation	Photography clubs and groups Possibility of holding live-in workshops targeted to individuals
Arts / Craft / Literary	Boutique accommodation in quality settings Skilled artists and artisans to act as tutors Facilities for community arts	Live in workshops targeted to: Art and craft groups and associations Beginners interested in taking up classes Social groups / church groups Reading groups / book clubs
Camps & Clinics	Extensive range of sporting facilities and activities (eg mountain biking, rocks sports) Accommodation suitable for groups	Regional Academy of Sport / NSW Institute of Sport clinics Sporting associations & clubs Commercial operators

Activities	Assets / Products	Potential Markets
Aviation-based	Landing facilities at Jaspers Brush, Nowra and Booderee National Park Learn to fly – lessons at Jaspers Brush airfield Sky diving - Nowra	Aero clubs – fly ins with accommodation and tour packages Learn to fly packages Sky-diving packages – possibly in conjunction with other activities Charter flights – tour and accommodation packages

## Surfing

Surfing is one of the main beach activities undertaken by visitors to the Shoalhaven. Within the surfing fraternity, the Shoalhaven is recognised for having quality surf breaks, including world class breaks, particularly in the Mollymook-Ulladulla and Bawley Coast areas. Four of the surf breaks in the City have international status, while 'No Toes' at Bawley Point is ranked as one of the 50 most dangerous wave sites in the world.

### The Market

In 2009 Destination NSW released 'Catching the Wave' – a strategy to consolidate NSW as Australia's premier surfing destination. The core objectives of the Strategy were:

- Consolidating NSW's position as Australia's premier surf destination
- Increasing NSW's share of the Australian surf tourism market
- Growing domestic and international visitation to Sydney and regional NSW coastal destinations

The key findings of the market research undertaken in preparing this Strategy are summarised below. Figures are given for 2008 unless specified otherwise.

#### Size of the Market

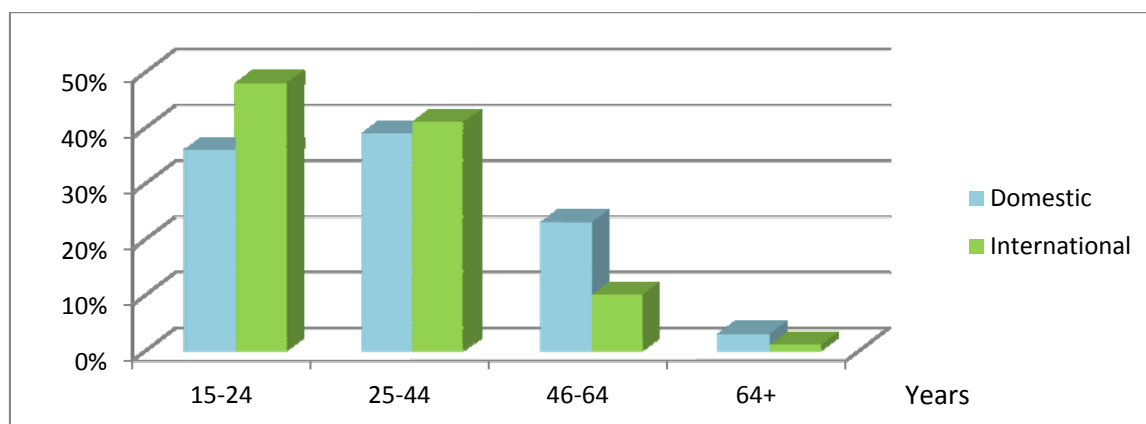
- Around 2 million Australians surfed with surfing ranked in the top 20 sports undertaken by Australians.
- There were 1.6 million overnight trips made to coastal destinations by international and domestic visitors to participate in surfing.
- Surfing events held in Australia have consistently ranked 14<sup>th</sup> of the top 20 spectator sports (6 years data).
- NSW is the most popular destination for surfing holidays in Australia, attracting 40% of trips.
- Participation in surfing by international visitors increased by 53% between 2004 and 2008.

#### Destinations

- 517,000 domestic visitors surfed while on holidays in NSW. Of these 77% were intrastate visitors.
- The South Coast is the most popular destination for domestic surfing holidays in NSW (36%), followed by the Mid North Coast (30%), the Far North Coast (20%) and Central Coast (7%). Just over 28,000 Victorians visited the NSW South Coast to surf.
- International visitors primarily surf in Sydney, Byron Bay and at Seven Mile Beach (surf camps)

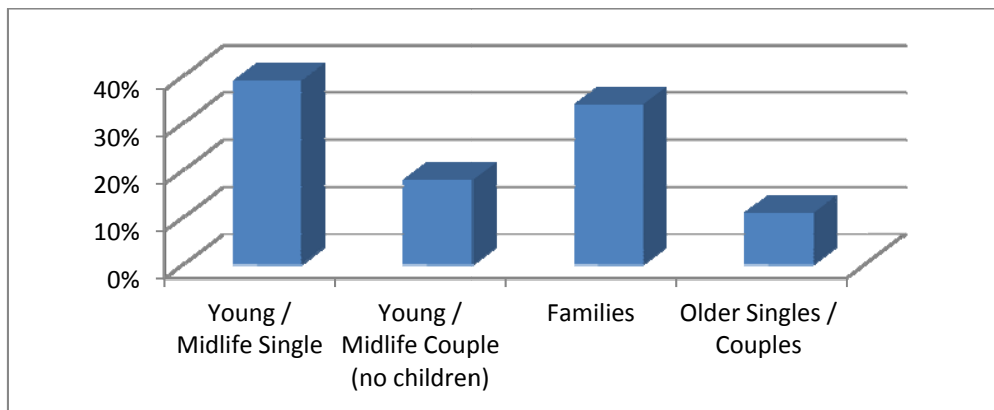
#### Demographic Profile

- The majority of surfers are Generation X and Y.

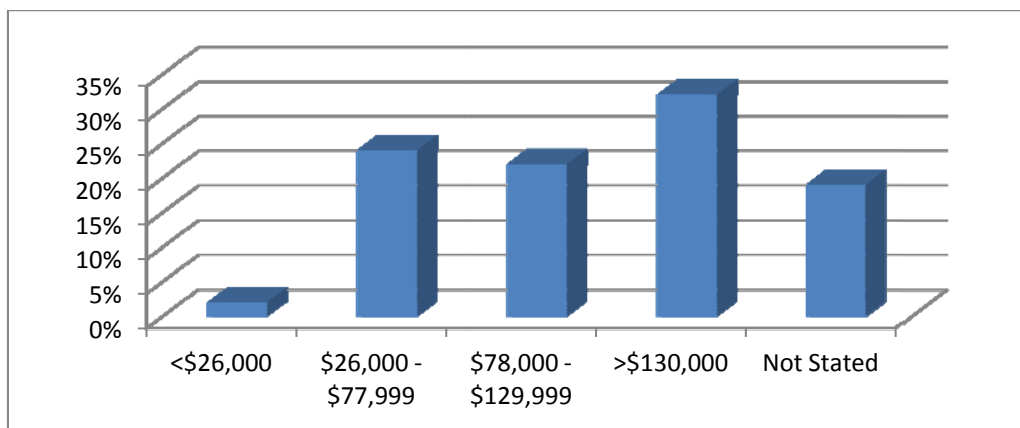


- 63% of domestic and 59% of international surfers are male. The female surfing market is growing. From 2004 to 2008, the number of females participating in surfing increased by 69%.

- The majority of surfers are young or midlife single people.

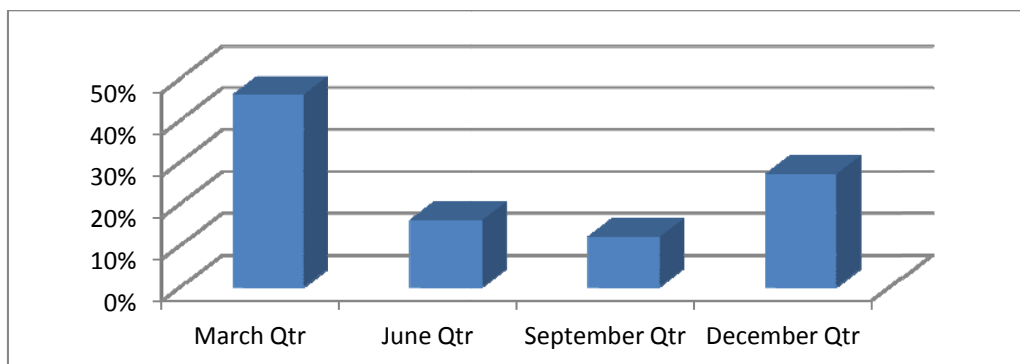


- The majority of people taking surfing holidays are members of high income households, with 32% having household incomes in excess of \$132,000. The more lucrative end of the market is the middle and older aged surfers, who have gone back into the sport, (typically with long boards).



Seasonality

- Surfing is season, with 46% of surf holidays being undertaken in the March Quarter.



Surfers are always looking for the best wave and will often bring the family for a weekend away. Recreational surfers have the most potential for growing surf tourism to the South Coast. This group seeks fun and relaxation in the waves. They have a preference for accessible beaches with infrastructure and amenities which are close to townships for after surf leisure activities. Long weekend and one week stays are ideal for



packaging of product for this market. For the 'dedicated enthusiast' and 'serious' surfers, the 'Break' (quality of the wave) is the selling point. Ideal accommodation product for the surf market is rented holiday home accommodation and caravan parks. Many of the younger surfers also camp with the headland caravan parks (eg Bendalong) being popular. Younger international visitors often look for backpacker accommodation, caravan park cabins, and pub hotels, or will hire a car and camp.

## Reaching the Market

The market can be reached via a mix of traditional and digital media channels. The Tracks and Surfing Life magazines (and associated websites) are very popular with the surfing market. Images of great waves and articles in these magazines are very effective in selling destinations.

The **Coastal Watch website** is very popular with domestic surfers. The site has swell and weather reports plus live streaming from web cams. There are two webcams operating in the Shoalhaven, located at Shoalhaven Heads and Sussex Inlet. Neither location is a 'top' break within the City, nor are these locations well known amongst the surfing community. As such, the webcams are not promoting the best of what the Shoalhaven has to offer. The higher profile locations with the City are the 'Dulla' (Ulladulla area), Bawley and the southern side of Booderee National Park (Caves Beach and Steamers). It would be ideal to have surf cams in one or more of these areas.

The '**wannasurf.com**' website is the most popular global surfing website. There are 49 surf breaks in the Shoalhaven listed on this site. Both Coastal Watch and WannaSurf have advertising on their websites, which can be very effective in building destination awareness. The Surfing Australia website ([www.surfindustralia.com](http://www.surfindustralia.com)) is popular amongst competitive surfers and also for people looking to try / take-up surfing. The site lists accredited surf schools as well as surfing events.

Tourism Australia has a 'Surf Australia' page on its website. The page lists the top surfing destinations in Australia, with Sydney, Byron Bay and the South Coast listed for NSW (top level). Within NSW, the Surf Camp at Gerroa and Jervis Bay are included in the list of the top sites in NSW.

On the Visit NSW site, a search using the key word 'surfing' identifies around 300 results. These results are dominated by surfing product on the North Coast (primarily Byron Bay) and in the Sydney Region. The products in the Shoalhaven and other South Coast LGAs are 'lost'. These products need to include 'South Coast' branding to gain traction over the North Coast dominance. A number of Sydney and North Coast operators also offer multi-day packages and tours, which are not promoted on the South Coast. With backpacker accommodation available in Ulladulla and caravan parks and other properties suitable for group accommodation in other coastal locations, there is opportunity for accommodation operators to work with the surf schools to offer multi-day packages.

## The Shoalhaven as a Surfing Destination

The Shoalhaven is recognised as a surfing destination, with the highest profile breaks being around Ulladulla-Mollymook, Bawley Point and Booderee National Park. The Dum Dums (Lake Tabourie), Guillotine (Bawley Point) and No Toes (Bawley Point) are ranked amongst the best breaks in the world for Pro / Kamikaze surfers. The breaks in Mollymook and Ulladulla are very well known and popular with experienced surfers.

In the past, Aboriginal surfing competitions have been held on the breaks in the Caves Beach (Booderee National Park) area. The Wreck Bay community is interested in re-instating these competitions and is exploring the potential of having the area declared an National Aboriginal Surfing Reserve. If this occurs it will be the first Aboriginal surfing reserve in Australia.

There are currently 6 National Surfing Reserves in Australia, 4 of which are in NSW (Cronulla, Killalea in Shellharbour LGA, Newcastle and Byron Bay). Ideally Ulladulla and/or the Bawley Coast should also be seeking to be recognised as a National Surfing reserve.

## Popular Surfing Breaks – Shoalhaven City

Precinct	Locality	Break	Quality Star	Direction R=Right L=Left	Type	Experience Needed
North	Shoalhaven Heads	Shoalhaven Heads	3	R&L	Beach break	Experienced
		Comerong Island	3	R&L	Beach break	All
Central	Currarong	Hammerhead	3.5	R&L	Reef-coral	All
		Currarong / Beecroft	3	L	Reef-coral	Experienced
	Culburra	Warrain Beach Reef	3.5	L	Reef-rocky	All
		Culburra Beach	3	R	Beach break	All
Crookhaven	Eddies	3.5	L	Reef-rocky	Pro or Kamikaze	
Bay & Basin	Booderee National Park	Cave Beach	3.5	R&L	Beach break	All
		Blackrock	5	L	Reef-rocky	Experienced
		Caves Cungee	3.5	R&L	Reef-rocky	Experienced
		Green Patch	1.5		Beach break	Beginners
		Steamers Beach	2	R&L	Beach break	All
		Steeles S				
		Whiting Bommie	3.5	R&L	Reef-coral	Pro or Kamikaze
	Aussie Pipe				Experienced	
	Jervis Bay	Sailors	3.5	R	Reef-rocky	All
		Husky Bommie	3.5	R&L	Reef-rocky	Experienced
		Blenheim Beach	1.5	R	Reef-rocky	Experienced
		Callala	3.5	Left	Reef-rocky	All
		Death Row	3.5	L	Reef-rocky	Pro or Kamikaze
Sussex Inlet	Berrara	Berrara Point				
	Cudmirrah	Cudmirrah Reef		R	Reef-rocky	Pro or Kamikaze
	Sussex Inlet	Conneley's Reef	3.5		Reef-rocky	All
Ulladulla District	Bendalong	Bendalong	3.5	R&L	Beach break	All
		3 Way	3	R&L	Reef-coral	Pro or Kamikaze
		Monument Beach	3.5	R&L	Beach break	Experienced
		Panther Country	3.5	R&L	Reef-rocky	Experienced
	Manyana	Hamburgers	3.5	R&L	Reef-rocky	Experienced
		Inyadda	3	R&L	Beach break	All
	Cunjurong	Green Island	3.5	L	Rocky-reef	Experienced
	Lake Conjola	Conjola Beach	3	R&L	Beach break	Experienced
	Narrawallee	Bannisters Head – Suck Rock	3	R	Reef-coral	Pro or Kamikaze
		Narrawallee Shelf	5	L	Reef-rocky	Experienced
		Narrawallee Wedge	4.5	R&L	Sandbar	Pro or Kamikaze
	Mollymook	Mollymook Reef	3.5	R&L	Reef-rocky	Experienced
		Golf Course Reef	3.5	R	Reef-coral	Experienced
	Ulladulla	Eeries Right	3	R	Reef-rocky	Experienced
		Rennies Beach Flat Rock	4.5	R&L	Point break	Experienced
	Burrill Lake	Racecourse Reef				
	Dolphin Point	Dolphins Point	3.5	R&L	Reef-rocky	Pro or Kamikaze
		Pot Holes	3.5	R&L	Reef-rocky	Experienced
	Lake Tabourie	North Tabourie	3.5	R&L	Beach break	All
		Dum Dums	3.5	R	Reef-rocky	Pro or Kamikaze
Bawley Coast	Bawley Point	Bawley Point	4	R	Reef-rocky	Experienced
		Gannet Point	3.5	R&L	Point break	Experienced
		Guillotines	5	R	Reef-rocky	Pro or Kamikaze
		No Toes	5			Pro or Kamikaze
	Kioloa	Blowies	3.5	R&L	Reef-rocky	Experienced
	Meroo	Meroo Headland	3	R&L	Beach break	All
		Headland - Wedge	3.5	R&L	Reef-rocky	Experienced
	Nuggin	3	R&L	Reef-rocky	Experienced	

Compiled from: [www.wannasurf.com](http://www.wannasurf.com) and [www.surfingatlas.com](http://www.surfingatlas.com)

There are six surf schools operating in the Shoalhaven:

- Lands Edge, Seven Mile Beach (primarily school groups)
- Culburra Beach Surf School and Board Hire
- Jervis Bay and Sussex Inlet Surf School
- Mollymook Beach Surf School
- Pam Burrridge Surf Schools (Ulladulla area)
- Ulladulla Surf School

The Pam Burrridge and Ulladulla Surf Schools are accredited by Surfing Australia and listed on the Surfing Australia website and the micro site 'Surf Schools Australia'.

## Wildlife Tourism –Wildlife & Birdlife

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Wildlife tourism is generally defined as ‘tourism undertaken to view or encounter wildlife’. It can take place in a number of settings, ranging from in the wild, through to semi-captive and captive. Wildlife tourism is a subset of Nature-based tourism, and is generally considered both sustainable and educational.

The ability to view wildlife (up close and personal) is one of the key strengths of the NSW South Coast. The Region is known for its whale and dolphin watching and its ‘surfing’ kangaroos and is becoming known for its seal colony. The South Coast is also well known for its prolific bird life, in particular pelagic birds, migratory birds and shore-birds and waders. All three South Coast LGAs promote whale watching, with the Eurobodalla Coast and Sapphire Coast also promoting bird routes and bird watching.

Prolific terrestrial and marine wildlife and birdlife are part of the ‘Shoalhaven’ brand and experience, with the area known for:

- Kangaroos – with most of the smaller coastal villages having local ‘mobs’ which make themselves at home in the village streets. Kangaroos are also plentiful in Kangaroo Valley and along the Shoalhaven River corridor. Video footage of the ‘surfing kangaroos’ at Pebbly Beach has gone viral on the internet, and is one of the attractions that brings international visitors into the City.
- Whale watching – humpback and southern right whales are common sights off the Shoalhaven Coast during the migratory seasons, with whale watching cruises available from Jervis Bay and Ulladulla.
- Dolphins – resident pod within Jervis Bay, with Jervis Bay known for its dolphin watching cruises.
- Wombats – well known amongst campers in Kangaroo Valley (Bendeela) and along the Shoalhaven River (Gradys, Coolendel and Yalwal).

In addition:

- The Jervis Bay Marine Park is becoming known for its giant stingrays and turtles (seasonal) and is the home of the closest accessible seal colony to Sydney and a grey nurse shark breeding area.
- Lake Wollumboola is an internationally recognised ‘Important Birding Area’ with a large black swan colony as well as a destination for migratory sea birds. The Lake is a wetland of international importance, with Ramsar listing currently being sort. There are also a number of other migratory, shore, heath and forest bird ‘hot spots’ in the City.
- There are penguin colonies at Jervis Bay and off the Bawley Coast.

There is a range of quality nature-based accommodation properties in the City (eg Paperbark Camp) that can be marketed in conjunction with the wildlife and birdlife experiences.

## Possible Markets

In addition to appealing to the mainstream domestic market and international visitors (current markets) there is also opportunity for:

- Using ‘up close and personal’ wildlife viewing experiences to market to residents of Sydney, Illawarra and the ACT, from non-English speaking backgrounds.
- Marketing to international students in universities in Sydney, Wollongong and the ACT as an activity to do with friends and relatives who visit from overseas.

- Targeting both domestic and international:
  - Natural History Clubs and Associations
  - Museum Societies and Friends Societies
  - Botanical Clubs and Societies
  - Bird watchers / birding clubs
  - Photography groups

Most of the larger clubs and associations run escorted tour programs with trips to areas of high ecological value. To break into the international market, the Shoalhaven would most likely need to partner with other quality wildlife / nature-based destination in NSW (for example with Lord Howe Island) and possibly Australia.

- Targeting eco, nature-based, environmental, bird and wildlife/ bird photography tour operators – both nationally and internationally – seeking to have Shoalhaven experiences included in tour programs.
- Targeting ecological, environmental and other theme-related national and international conferences – both for holding the event in the Shoalhaven, and to be included in pre and post conference tour packages for international conferences hosted in Sydney, Wollongong and Canberra.
- Building a number of Shoalhaven specific wildlife events – eg building on the Jervis Bay Whale Festival, developing a bird event based around the arrival of the migratory birds, running a program of themed wildlife based photographic / art-based workshops and competitions – eg Bird Week, Sea Week, Forest Week.

## Whale Watching

The whale watching sector has experienced significant growth over the past 20 years. Hervey Bay in Queensland is recognised as the ‘top’ destination for whale watching in Australia. There are 4 NSW locations ranked in the Top 10 whale watching areas in NSW, with Byron Bay ranked 3<sup>rd</sup>, Merimbula 5<sup>th</sup>, Port Stephens 7<sup>th</sup> and Sydney 10<sup>th</sup>. Whale watching cruises operate out of most of the ports along the NSW coastline. There is a concentration of operators based in Port Stephens (6 larger companies plus smaller charter fishing and sailing boats) and Sydney (9 operators). Sydney, Port Stephens and Jervis Bay actively target the international and group tour markets.

On the South Coast, there is a concentration of whale tour operators at Jervis Bay (2 tour operators and 3 small charter operators), Bateman’s Bay (4), Moruya (2) and Narooma (4), with cruises also operating out of Ulladulla, Merimbula and Eden. Eden has the Killer Whale Museum plus the Davidson Whale Station and Ben Boyd Tower Historic Sites.

The whale watching season extends from June through to the first week in July (northward migration) and from September through to November (southward migration, often with calves). The annual National Whale Census Day is the last Sunday in June, with the whale watching area at Booderee National Park being one of the data collection sites. Humpbacks and Southern Right Whales are the most common species seen along the South Coast, however there are also 10 less common species also found in the waters.

The National Parks & Wildlife Service (NPWS) have recently launched their new website, with the site having a ‘Wild About Whales’ micro-site. The site identifies the best vantage points in NSW to watch whales, with Jervis Bay identified on the site as a ‘Whale Hot Spot’. The site also provides information on whale watching tips, whale identification and whale tracking. NPWS have also launched a whale APP with whale watchers able to get information on and log sightings, post photographs and track whales. The website also includes information on the Jervis Bay Whale Festival – one of 5 whale festivals held in NSW.

The Wild About Whales website and APP provide the opportunity for the Shoalhaven to raise its profile as a whale watching destination. This would require the Shoalhaven to become a ‘whale spotter’ regularly updating the whale sightings on the NPWS APP / website. The two major Whale Watch Cruise operators at Jervis Bay currently do this on their own websites.

### **Shoalhaven Whale Product & Infrastructure**

The Shoalhaven Whale watching product and infrastructure includes:

Cruises	Dolphin Watch, Jervis Bay Jervis Bay Whales (Dolphin Wild)
Charters	Beachdaze, Jervis Bay Jervis Bay Fishing Charters Jervis Bay Sailing Charters Ulladulla Fishing Charters
Whale Watching Platforms / Lookouts	<u>With Interpretation</u> Penguin Head, Culburra Beach St George Lighthouse, Booderee National Park Warden’s Head, Ulladulla  Without Interpretation – platforms on numerous headlands along the Shoalhaven Coast. QR Codes could be used on these platforms to enable visitors to download the NPWS whale APP to access interpretative information on whales.
Festivals & Events	Jervis Bay Whale Watching Festival - month long festival in June Whale Census Day – Last Sunday in June – Booderee National Park
The Shoalhaven Whale	Shoalhaven has adopted a hump-back whale – Muriyira

The main point of difference to other whale watching product along the NSW coast, is that the whales come into Jervis Bay to rest, and can be viewed from the still waters of the Bay, rather than having to go out into the open ocean. The Bay also attracts a lot of mother whales with calves during the spring whale watching season.

### **Shoalhaven Tourism Website**

Whale Watching is included as an activity on the Shoalhaven Tourism website. At present, the page provides links to the NPWS Wild About Whales site, the cruise operators and the site for the Jervis Bay Whale Festival. It would be desirable to include information about shore-based whale watching locations along the Shoalhaven Coast, as well as information on Muriyira the Shoalhaven Whale.

Promotional / PR activities could be developed around Muriyira. There may also be opportunity for each of the towns and villages within the Shoalhaven to adopt a whale, with local promotions and activities (designed to generate publicity and awareness) built around these whales (eg an annual betting competition on the first and last of the locally adopted whales to pass through the area). There may also be opportunity to include an ‘Aboriginal’ overlay at the interpretative sites – myths, legends, stories associated with the whales.

### **Dolphin Watching**

Dolphin Watching is one of the high profile attractions of Jervis Bay and the Shoalhaven. There is a resident pod of around 60 dolphins in Jervis Bay, with Dolphin Watch and Dolphin Wild running daily dolphin watching cruises. These cruises are attracting international visitors, including large tour groups. Dolphins are also frequently seen along the Shoalhaven coastline and in the lower reaches of the Shoalhaven River near Greenwell Point, Orient Point and Crookhaven Heads.

There is opportunity for Huskisson / Jervis Bay to capitalise more effectively on the Jervis Bay dolphins, possibly through interpretative displays and public art. The Callala Chamber has also suggested building a dolphin viewing platform at Callala Bay (near Wowly Creek) to provide interpretative information on the dolphins in the Bay as well as opportunities to view the dolphins in Callala Bay.

## Kangaroos

Kangaroos are one of wildlife icons of the South Coast. Kangaroos are found in many of the coastal towns and villages, particularly in the quieter areas (eg Currarong, Berrara, and along the Bawley Coast). The kangaroos appeal to both the domestic and international markets. A You Tube video of kangaroos 'surfing' at Pebbly Beach has received a lot of coverage internationally, and has resulted in international visitors coming into the area specifically to visit Pebbly Beach. Tourism Australia is currently running an advertising campaign internationally which has a scene from Pebbly Beach – one of 11 icon areas being featured.

This provides a small window of opportunity to package 'kangaroo / wildlife' tours with the dolphin tours for promotion to the international market. (Note: Sydney Wildlife and Adventure Tours offer 1 day dolphin and whale watching tours to Jervis Bay, and a 2 day tour which combines a whale / dolphin watch cruise with the birds at Green Patch and the Kangaroos at Pebbly Beach). There is also an opportunity for a local tour operator / activity provider to diversify into wildlife tourism.

## Other Wildlife

Other wildlife viewing opportunities include:

- The Jervis Bay seal colonies – Some of the Dolphin cruises include a visit to the seal colony. Jervis Bay Dive also runs 'Seal Dives' in winter.
- Turtles and Giant Sting Rays in Jervis Bay.
- Grey Nurse Shark breeding area (for divers)
- Wombats – along the Shoalhaven River corridor – can generally be seen at Bendeela, O'Grady's and Coolendel camping areas.

## Bird Watching

Bird watching and bird photography are potentially lucrative niche markets, particularly if the area can attract inbound bird watching and bird photography tour groups.

The bird photography tour market is well developed in the United States and Europe and is emerging in Australia. Bird photography has been developed in Western Australia and are attracting international groups. Lord Howe Island is currently developing this market. Photography tours are generally hosted by a high profile, specialist bird photographer and structured with a mix of workshops and field trips. This is a very high yield market that is willing to travel to remote destinations in the pursuit of rare birds. With its spectacular scenery and prolific bird life, the Shoalhaven could be an ideal destination for bird photography tours.

To become a recognised birding destination, a locality needs to have the following factors:

- A 'hook' of international significance – this can be a very rare bird, a bird event (eg nesting area of international value), or a habitat with a unique mix of birds.
- Bird 'hot spots' in the surrounding area, that provide different viewing habitats and have prolific bird life.
- Local birders with significant expertise in finding the rare birds, and being prepared to act as bird guides.



- Local birders and/or birding clubs that are prepared to take-on the commitment of communicating with the birding market. For example, if a rare bird is sighted, immediately notifying bird clubs, bird press etc that the bird has been seen with ongoing monitoring and reporting of the bird.
- Bird lists and supporting locational information.

Based on information provided in the submissions to the draft Tourism Masterplan and discussions with National Parks, the birding 'hot spots' and birding activities in Shoalhaven City include:

Bird Hot Spot / Product	Experience / Significance
Shoalhaven Heads – Comerong Island Nature Reserve	Shorebird Conservation Interpretative area – 'Domestic and International Runway' – annual refuge for migratory birds + year-round habitat for Australian shore birds and waders.
Lake Wollumboola (possible 'hook')	<p>Recognised by Birdlife International as an 'Important Birding Area' (IBA) – prolific birdlife – up to 20,000 birds on the Lake. The area is recognised under international migratory bird agreements, JAMBA and CAMBA.</p> <p>Threatened species habitat (10 threatened species) plus an over winter ground for migratory birds – 43 species of which 33 are protected under international agreements.</p> <p>Black Swan colonies – one of the largest in the world.</p> <p>Successful nesting area for the endangered Little Tern - school children's project of decoy birds</p> <p>Bird watching programs and school excursions conducted by NPWS and Lake Wollumboola Protection Society (LWPS).</p> <p>The Lake is listed in the Directory of Wetlands of National Significance and the Register of the National Estate. The LWPS is seeking Ramsar listing of the wetland.</p> <p>Two tour companies – 'Follow that Bird' and 'Kangaroo Valley and South Coast Tours', occasionally run birding tours to the Lake.</p>
Bomaderry Creek Regional Park	Rock Robin (Origma) and the Yellow-tufted Honey Eater. The Origma is a bird endemic to NSW
Booderee National Park	<p>Over 200 species of shore, heath and forest birds</p> <p>Little Penguin colony</p> <p>Full bird list available from Visitors Centre, detailed bird watching information available on Park website + bird watching APP.</p> <p>Guided Walks</p>
Pigeon House Mountain Didthul	Origma, Spotted Quail Thrush (+ prolific wildflowers in Spring)
Mt Bushwalker & Tianjara Plateau (Morton National Park)	Heath birds (winter) including Striated Field Wren
Lake Conjola Entrance & Narrawallee Inlet and Nature Reserve	Hooded Plover and heath and shore birds.
Depot Beach / Murramarang National Park	Bird interpretive information along Discovery Trail. Tall forest species – Little Lorikeet, Gang Gang Cockatoo, Rose Robin, Honey Eater, Swift Parrot (occasional sighting)
NPWS Discovery Programs	<p>Shore bird activities</p> <p>Bird watching activities</p>

Information on migratory and shore-birds has been erected at a number of locations along the Shoalhaven Coast line. Shoalhaven Tourism is also producing a Bird Watching information Brochure.

Further South, Eurobodalla Shire promotes three bird routes. One of the Charter Boat operators from Batemans Bay also runs off-shore tours to see the Pelagic birds. Bega Valley Shire also has bird routes, with the Far South Coast Bird Watchers Association running 2 bird watching tours per month which are open to visitors.

## Bird Tour Operators

List of Bird Tour Operators in Australia who service the International Market & bring tours into NSW - (list not comprehensive).

Birding Tours Australia  
Endemic Bird Tours  
Peregrine Bird Tours  
Follow that Bird  
Natural Travel Specialists  
Coates Wildlife Tours  
Birdranges NSW  
Sicklebill Safaris  
Wild Watch Australia

### **Specialist Bird Photography Tour Operators – operating out of the US, UK and Europe**

Greg Downing Photographic Tours	<a href="http://www.gdphotography.com">www.gdphotography.com</a>
Exotic Birding	<a href="http://www.exoticbird.com">www.exoticbird.com</a>
Wild Bird Eco Tours	<a href="http://www.wildbirdeco.com">www.wildbirdeco.com</a>
Wildlife Photography Tours	<a href="http://www.phototour.com">www.phototour.com</a>

(see [www.naturescapes.net](http://www.naturescapes.net) – which has a directory of tour operators)

## Photos: Shoalhaven Heads 'Runway'.





## Motor Sports

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Shoalhaven City Council has recently given support to Motorcycling NSW to develop a national standard motorsports complex at Yerrinyong in Nowra. The \$15 million complex will include a number of inter-linked tracks, and pit and spectator facilities. Construction on the complex is expected to start in 2013, with the complex to open in 2015.

The complex will be used for a variety of motorsports activities including:

- Motorcycle racing and events – The complex is being designed to accommodate each of the 9 competitive disciplines – Motocross, Enduro, Minikana, Road Racing, Historic Racing, Dirt Track, Supermoto, Speedway and Moto Trials.
- Rider training, including the 'Stay Upright' RMS programs.
- Driver training / advanced driving skills.
- Motor racing.
- Speedway
- Go Karting.

The complex is also expected to be available for the licensed drivers and riders to use their street vehicles on the track (Speed off the Street style programs) and for private hire for events, shows etc. It may also have activities such as 'Drive a V8' targeted to enthusiasts.

In addition to motor sports, the complex has the potential to provide a focus for other car and motor cycle based activities including:

- Car, truck, heavy equipment and motorcycle shows
- Car and motorcycle club and association rallies
- Show and shine events
- Swap meets
- Road safety / younger driver programs
- Driver training for emergency services

The complex may also have potential for use for other activities, such as outdoor exhibitions and entertainment (eg large music festival).

Building on the motor sports theme, consideration should be given to exploring the potential to use State Forests in the City for off-road rallying, including endeavouring to attract a high profile event such as the Suburu Rallies.

Ideally accommodation needs to be available at, or in very close proximity to, the complex. Wakefield Park for example has five six bedroom (sleeps 12) villas on site, while Mt Panorama at Bathurst has a Rydges Hotel offering 118 serviced apartments.



## Commercial Tour & Activity Operators – Shoalhaven City

One of the Strategies in the Tourism Masterplan is to strengthen and grow commercial tour product in the City. The following Tables identify both local and external tour companies that operate in the City. The list is not comprehensive. Touring is concentrated in the Northern and Central Shoalhaven, with Jervis Bay being the main destination, followed by Berry and Kangaroo Valley. The dolphin tours are the main product sold in the City.

### External Operators – licensed to operate in National Parks within the Shoalhaven

Tour companies based outside Shoalhaven City and running tours into the City – licensed to operate in National Parks

Operators	Base	Parks Used	Type of Tour / Activities
Beautiful Tours Australia	Sydney	Morton Jervis Bay	Boutique mini-bus tours day tours to the Illawarra region and the Jervis Bay area – targeted to international visitors – tours conducted in German or English. Jervis Bay tour includes dolphin watching.
Boutique Tours Australia	Sydney	Morton	Boutique guided / charter tour company specialising in winery tours and wildlife tours. 1-3 day tours. Mainly operates in the Hunter Valley and Blue Mountains with the occasional tour taking in the northern end of the Morton National Park. Potential to approach operator to offer Shoalhaven Wine and wildlife tours as part of their tour program.
Colourful Trips	Sydney	Morton Seven Mile Beach	Two Day Trips which include destinations in the Shoalhaven: <ul style="list-style-type: none"> <li>- Beaches &amp; Boomerangs – Seven Mile Beach &amp; Kangaroo Valley</li> <li>- Jervis Bay Dolphins – Dolphin Cruise, Boomerang Throwing at the Lady Denman</li> </ul>
Follow That Bird	Sydney	Morton	One day bird watching tours around the periphery of Sydney. No regular tours for the Shoalhaven area however will organise one-off longer tours and tailor tours to individual requirements.
K7 Adventures	Snowy Mountain Area	Morton / Tallowa Dam	Range of outdoor adventure based activities including canyoning, abseiling and rock climbing, mountain biking etc. Mainly operate in the Snowy Mountains & Canberra areas, however are licensed to operate in Morton National Park and conduct out-door based education programs for small groups in the Tallowa Dam area.
Land's Edge	Sydney / Gerringong / Batemans Bay	Morton Murrumarrang Seven Mile Beach	Specialist education provider – adventure, recreation, curriculum based field studies, plus a surf school operating at Seven Mile Beach. Programs are concentrated around the northern edge of the City and in Murrumarrang National Park – primarily in the Eurobodalla Shire part of the Park.
Life's an Adventure	Sydney	Cambewarra Range Nature Reserve Morton / Tallowa Dam	Adventure based company specialising in Kayaking, Bush Walking and Mountain Bike tours in Sydney and the surrounding region, primarily the Blue Mountains. The company also offers extended escorted tours, with all luggage transferred between overnight sites. The Company has an Outdoor Adventure Social Club which runs day and half day activities most weekends as well as the occasional trip away. The company also offers corporate training and team building programs.
Outdoor Insights		Morton	Specialises in corporate outdoor experiential training. Activities include abseiling, canoeing, orienteering, sea kayaking, bushwalking, camping, mountain biking and eco challenges. Uses Jervis Bay for Sea Kayaking and Kangaroo River / Tallowa Dam and the northern end of the Morton National Park for canoeing, mountain biking, bushwalking, camping and eco-challenges. The company uses four accommodation properties within the

			Shoalhaven – Avrajita in Kangaroo Valley, KV Golf & Country Club, Coolangatta Estate & Paperbark Camp.
Southbound Adventures	Shellharbour	Morton / Tallowa Dam	Outdoor Education Provider – walking, canoeing, mountain biking, abseiling, rock climbing, bushwalking etc – offering extended programs in Tasmania, New Zealand and along the Murray River as well Duke of Edinburgh Programs. Within the Shoalhaven, the company primarily operates in the Kangaroo Valley area.
The Outdoor Education Group	Moss Vale (NSW) Eildon (Vic)	Jerrawangala Morton Murramarang Bugong	Runs outdoor education programs including specialist activities (bushwalking, abseiling, kayaking, mountain biking etc) as well as ‘journey based’ outdoor programs ranging from 3 days to 4 weeks in length. The Bugong National Park – Beehive Point & Jacks Corner are used for abseiling activities. Other programs operate in the Jerrawangala, Morton and Murramarang National Parks. Also run Duke of Edinburgh Programs.
Total Eco Adventures / South Coast Nature Tours	Broulee	Meroo Morton Murramarang	Outdoor adventure tour operator and outdoor education provider. Mainly operates in Eurobodalla Shire primarily in the Batemans Bay Marine Park and the southern section of the Murramarang National Park. Runs the Broulee surf school, as well as kayaking, snorkelling and stand-up paddle boarding activities.
Wild Women On Top	Sydney	Morton (Pigeon House)	Programs of guided bushwalks in remote areas throughout NSW as well as longer trips including overseas programs. Organises the Coast Trek Teams Walk which raises funds for the Fred Hollows Foundation.

## Other External Tour Operators bringing Groups into the City

Operator	Product
Sydney Wildlife & Adventure Tours	1 day dolphin and whale watching tours to Jervis Bay. 2 day wildlife tours – Whale / dolphin watching Jervis Bay + birds at Green Patch + Pebbly Beach Kangaroos
Kangaroo Valley & South Coast Tours	Customised day trips into the northern Shoalhaven – includes dolphin & whale watching, and bird watching (Shoalhaven Heads, Lake Wollumboola)
Surfing Kangaroo Tours	Day tours out of Sydney - Dolphin & Whale Watching in Jervis Bay plus Berry & Kangaroo Valley
Sydney Weekend Adventures	Southern Explorer – 3 day tour taking in Kangaroo Valley, Berry, Coolangatta Estate and Jervis Bay
Australian Cycling Holidays	Berry Vineyards Tour (2-3 days), Shoalhaven Bays Tour (6 days)
Country Trails	Customised tours to Jervis Bay
Victors Food	2 day tour – Berry, Greenwell Point (oysters), Jervis Bay, Booderee National Park, dining at the Gunyah Restaurant at Paperbark Camp
Australian Pacific Touring (APT)	Jervis Bay Dolphin Tour
Pegasus Day Tour	Shoalhaven Tour – Shoalhaven River Cruise, Fleet Air Arm Museum, Kangaroo Valley Jervis Bay Tour – dolphin / whale watching

## Shoalhaven City based Tour & Activity Operators

	North	Nowra - Bomaderry	Culburra & Surrounds	Bay & Basin	Sussex Inlet	Ulladulla District	Bawley Coast
<b>Water-based</b>							
Cruises		Shoalhaven River Cruises	Escape Fishing Charters  Silver Star Fishing Charters	Dolphin Watch / JB Whales / JB Luxury Sailing / Extreme  Dolphin Wild / JB Whales  JB Sailing Charters  Blue Water Dive & Fishing Charters		Burrill Lake Cruises and Fishing Charters	
Fishing				Bay & Basin Sports Fishing  JB Fishing & Sight Seeing Charters		Ulladulla Fishing Charters Surf & Fish Charters Ulladulla Burrill Lake Cruises and Fishing Charters	
Paddling	KV Safaris  KV Adventure Company  Wilderness Experience Training			JB Stand-Up Paddling JB Kayak Company		Coastal Paddle Surf	
Surf School	Land's Edge (school groups)		Culburra Beach Surf School & Hire	JB & SI Surf School	JB & SI Surf School	Mollymook Beach Surf School Pam Burridge Surf Schools – Mollymook & Bendalong Ulladulla Surf School	
Diving				Ocean Trek Diving Crest Diving JB Dive Charters Deep 6 Diving / Dive		Ulladulla Dive & Adventure	

	North	Nowra - Bomaderry	Culburra & Surrounds	Bay & Basin	Sussex Inlet	Ulladulla District	Bawley Coast
				Jervis Bay Blue Water Dive & Fishing Charters			
Water Skiing / Wake-Boarding		The Wake Board School				Walk on Water (operates throughout the Shoalhaven)	
Other				Slingshot – trill ride			
<b>Land Based</b>							
Sight-Seeing		Awesome Trike Tours				Milton Heritage Tours / Ghost Walks – Milton	
Adventure – Mountain biking, bushwalking, abseiling etc	KV Adventure Company Wilderness Experience Training						
Air Sports	South Coast Recreational Flying Club – Learn to Fly	Sky Dive Nowra					
Horse Riding	Man from Kangaroo Valley			Valhalla Horse Riding & Farm Holidays			Timbertops Termeil (school holidays only)
Food & Wine	Foodscape Tours  Flavours of the Valley  Kenny's Escapes Food & Wine Tours						
Aboriginal Culture				Booderee National Park - guided walks, basket weaving workshops, talks		Jamane Gunya Cultural Experience Camp	
Other	NPWS Discovery Programs	NPWS Discovery Programs	NPWS Discovery Programs  Lake Wollumboola Protection	NPWS Discovery Programs  Booderee NP Guided Programs		GZone Flower Farm (group tours only)  NPWS Discovery Programs	NPWS Discovery Programs



	North	Nowra - Bomaderry	Culburra & Surrounds	Bay & Basin	Sussex Inlet	Ulladulla District	Bawley Coast
			Association - Bird Watching / Environmental Tours				
<b>Equipment Hire</b>							
Bicycles	Berry Mountain Cycles KV Kayak & Bike Hire			Shoalhaven Bike Hire			
Canoes / Kayaks	KV Canoe Hire / KV Kayak & Bike Hire	Shoalhaven Kayaks	Anglers Rest Kayaks	Canoe with a View JB Kayak Company			
Boat		Shoalhaven House Boats	Anglers Rest Boat Hire  Alonga Boat Hire	Husky Hire a Boat	Sussex Inlet Marine Centre  SI Houseboats		