

A photograph of a rugged coastline with rocky cliffs and waves crashing against the shore. In the foreground, two hikers with backpacks are walking along a path covered in low-lying vegetation, looking out towards the ocean.

Cape to Cape Eco Accommodation Pre-Feasibility Study

FINAL REPORT | October 2020

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This report was prepared by TRC Tourism in relation to the Cape to Cape Eco Accommodation Pre-Feasibility Study.

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Executive Summary

The Cape to Cape (C2C) Track is a long-distance walking trail located in the far south-west corner of Western Australia, 250 kilometres south of Perth. It meanders along the whole length of the Leeuwin-Naturaliste Ridge, which forms the backbone of the Leeuwin-Naturaliste National Park.

The Cape to Cape Walk is the ‘backbone’ of the Leeuwin-Naturaliste National Park. The Park attracts 3.37M visitors per annum (2018-19)¹, making it the most popular national park in Western Australia. The Park’s popularity is not surprising given it is only a three hour drive south of Perth, and borders the iconic Margaret River winery region and the broader ‘Australia’s South West’ region which is synonymous as a place rich in nature, adventure, culture, coastal, culinary and historical experiences.

The C2C is within this well-known area and provides a range of connecting experiences stretching from Cape Naturaliste in the north, following the coast to Cape Leeuwin in the south 123 km away.

Four walker markets use the Cape to Cape. These are:



Although many people visit the National Park each year for a range of recreational activities, the C2C itself attracts around 20,000 walkers per year, who undertake a range of short, day and multi-day walks. With over 70 step-on / step-off access points, around 6,000 of the track’s walkers per year do an overnight walk (from 1 night through to 7 nights). Approximately 1000 of these walkers complete the entire 8 day end-to-end walk.²

The C2C offers both fully facilitated and independent walking experiences. There are currently six operators offering a range of off track accommodated itineraries, including one operator delivering the Great Walks of Australia signature C2C experience. Walkers can also undertake the walk independently with some campsites provided by DBCA.

¹ Department of Biodiversity, Conservation and Attractions, national park visitation 2018-2019

² TRC estimates

With possible growth and interest in the C2C experience, Tourism WA have commissioned this study to understand the demand and the opportunity for new eco-accommodation along the Track.

The brief required three types of accommodation to be evaluated:

- » Budget camping accommodation (self-catered camping)
- » Moderate accommodation (ie basic tent, limited catering, shared ablutions)
- » Upmarket accommodation (ie cabin / luxury tent, fully catered, en-suite ablutions).

The findings

- **Demand** is likely to grow for the Cape to Cape track through a) tourism growth over time beyond COVID-19 b) increasing interest in nature based and adventure activities and c) growth amongst markets that have a high propensity for this type of experience.
- The **optimal positioning** and **point of difference** that will enable the Cape to Cape to grow the supported walker market share relative to other well-known multi day walks, lies in the connection between the walk and other attributes and experiences of the destination. This has been expressed and re-iterated by commercial operators and other stakeholders. This positioning predominantly relies on in region accommodation from which walkers are transported to and from trailheads on a daily basis.
- Much of the **track infrastructure** is in poor condition, in comparison to, for example all the Great Walks of Australia tracks, requiring considerable investment in alignments, surface, drainage and allied amenities to be of a standard suited to a great walking experience.
- There also continues to be potential for growth in the **independent walker market** that undertakes longer walks (e.g. 7 night end to end), camps and carries their own luggage, as well as camping with luggage transfers between overnight camps.
- Whilst a large range of accommodation exists in the region, there are **gaps in the high end accommodation**, although three new high-end accommodation properties are planned, all within close proximity to the track. Existing average annual occupancy rates are low at 55%, which is anticipated to be further impacted with a downturn in visitation and the negative economic impacts of COVID-19
- **Camping facilities** for independent overnight walkers on the track are inadequate and inappropriately spaced to meet market needs.

Financial returns on investment in accommodation

Based on the three accommodation categories, the following financial returns were estimated should new on-track accommodation be developed:

Budget accommodation

The establishment of budget style camping facilities supporting a largely independent and self catering market, charged at \$11/night (DBCA fee rate), would see a reasonable return on investment at each of the modelled growth rates (current on track campsites along the north of the track charge no fee).

Moderate accommodation

The establishment of moderate style camping facilities (basic tents provided, on-site camp manager / host, communal cooking shelter, shared amenities etc.) charged at \$25 / night, would not see a return on investment at each of the modelled growth rates for several years.

However, for the moderate level accommodation, if there were no provision of tents or catering requirements, an on-site manager would not be required. Under this scenario, still charging at \$25/person/night and with a similar investment into good quality facilities (designated tent platforms for own tents, a communal shelter and toilets) on each growth rate a solid return on investment would be delivered.

Upmarket on trail accommodation

This type of accommodation was evaluated on the basis of three nights/sites as the market that would pay for this type of accommodation is unlikely to walk for seven days. It is based on a capacity of 12 guests plus two staff/location based on the experience of other iconic multi day walks where an exclusive experience on track is desirable.

The analysis examines the return on investment for one of the sites and the result would be the same for each of the sites. For a range of occupancy levels from 50-100%, the return on investment is adequate at 75% and 100% occupancy rate and negative at lower rates.

Recommendations

Upmarket accommodation

- Given the financial analysis of ROI for upmarket accommodation, the additional high end properties coming on-line near the track in the future, the broad range of off track accommodation already available and the downturn in the tourism industry due to COVID-19, we would not recommend offering upmarket accommodation for EOI at this stage. Demand could be re-evaluated in a few years after the track has been upgraded, campsites established, continued promotion and positioning of the experience and the tourism industry has recovered.
- On track upmarket accommodation could also dilute what we believe to be the optimal positioning for the Cape to Cape for supported walkers – the experience enables a connection between the walker and the destinations’ character, attributes and values. Staying in upmarket accommodation on track does not enable the same level of local interaction with the destination as offered by off track options.

Camping facilities

- Whilst budget camping facilities could be provided, it is recommended that as the track is upgraded, priority should be given to a **consistent high standard of moderate standard camping facilities** at appropriately distanced locations, suited to 7-night walks by independent overnight walkers and walker groups.

Moderate standard camping would see attractive campsites, potentially with tent platforms, shared ablutions plus a cooking and gathering shelter.

Under this scenario there would not be ‘tents’ or similar provided, but walkers would bring their own. Opportunities could also be provided for commercial operators to store equipment and, potentially, have separate sites nearby. Walkers could, if they wished, avail themselves of local services to transport luggage between campsites.

Track infrastructure

- It is recommended that a **Cape to Cape track master plan** is developed to determine all experience and infrastructure requirements as well as maintenance and optimal governance arrangements. The role of the master plan would be to:
 - Determine the optimal route (including seasonal access management), materials and priorities for upgrades and alignments as well as appropriate locations for overnight nodes. There are significant natural values that will require detailed planning to determine appropriate sites for overnight nodes.
 - Audit existing infrastructure including signs, way-finding and interpretation, shelters and rest areas, amenities (water, toilets), accessibility needs etc.
 - Identify sites and concepts for significant lookout points suited to all walker markets
 - Prepare concept design options using best practice sustainability guidelines on material choices, minimal impact construction and resources (renewable energy and water collection).
 - Address all components of the visitor experience cycle – development of a ‘one-stop-shop’ for planning, a sense of arrival and welcome (visitor centre / C2C hub), on track experiences delivered and expectations surpassed, opportunities for sharing and ‘remembering’ through purchase of gifts and souvenirs.

Regional strategy

- Positioning of the region for its nature-based assets can also be strengthened through further development and promotion of a suite of trails through the Unbeaten Trails project that can underpin diversity in target markets and add new demand drivers. Although there may not be opportunities to physically connect these trails, the network can certainly be promoted to encourage longer regional stays and repeat visitation to complete different trails and sections.

Fee for overnight walkers and commercial operators

- Upon the completion of upgrades to the track and the establishment of good camping facilities, it would be timely to introduce a **fee for overnight walkers and commercial operators** that can be re invested in the track. This could be collected through the on track camping fees and a per capita fee for clients using either commercial shuttle services to access trailheads or walking with commercial guiding companies. Registration and collection of fees also enables monitoring, measuring of impacts and appropriate management of track. Fees could be packaged similar to the Three Capes Track to support other experiences depending on individual interests (e.g. caves and lighthouse access, shuttle bus, adventure activities and overnight on track accommodation). Such a structure would need to be thoroughly and carefully mapped out and justified, demonstrating benefits from the fees (improvements to track and facilities) and method for collection and management. Existing tour operators and stakeholders would need to be closely consulted on this, noting that commercial entities will need to incorporate such fees into their own charges. An analysis of fee charging systems across a range of overnight walks can be viewed in Appendix E.

1 Introduction

‘The Cape to Cape Track (C2C) runs for 123 kilometres along the Leeuwin-Naturaliste Ridge, between the lighthouses of Cape Naturaliste and Cape Leeuwin in the far south west of Western Australia. It features spectacular coastal and forest scenery, a fascinating geology of cliffs, caves, headlands and rock formations and an ever-changing display of vegetation and wildflowers.’³

1.1 About the Cape to Cape (C2C)

The C2C has been designed to connect people to the environment, linking the pristine WA coastline with sheltered woodlands. The Track provides a range of walking options for visitors of varying abilities from short wheelchair and stroller friendly sections, through to more rugged and remote sections. Some visitors undertake the track in its entirety either as a guided or independent option, utilising off track accommodation or on track campgrounds. Due to the flexibility of options, the Track appeals to a range of markets from local community members and ‘Friends of’ groups, independent adventure walkers preferring to camp, domestic independent walkers using local accommodation in-between sections and tour groups. There are also several day visitor nodes where people access the coast for swimming, surfing and general recreation.

1.2 Purpose of this study

TRC Tourism (TRC) was contracted by Tourism WA to undertake a Demand and Pre-Feasibility Study on the potential to locate ecotourism accommodation on the Cape to Cape track (C2C). Although there is accommodation in various communities between Cape Naturaliste to Cape Leeuwin, some are situated a fair distance off the actual Track. Both Tourism WA and the Department of Biodiversity, Conservation and Attractions (DBCA) have received expressions of interest from various private proponents interested in developing new ecotourism accommodation along the C2C. Prior to considering such proposals and in competitive fairness and transparency, Tourism WA has commissioned this study to inform decision making on whether the ecotourism accommodation opportunities should proceed further.

1.3 Methodology

This Report comprises of a range of components:

- **Desktop research and analysis** – current situation (including use, products and experiences), market demand and trends, literature review of relevant strategies and plans, case studies and benchmarking of other ‘Great Walks of Australia’ and similar overseas experiences.

³ Friends of the Cape to Cape Track

- **Consultation** – preliminary discussions with range of stakeholders from State Government agencies, local Councils, Regional Tourism Organisations (RTOs), commercial walk operators, commercial transport operators, community groups and private sector developers (summary of consultation).
- **Track assessment** – the walker experience, gaps, opportunities and challenges, potential impacts of new infrastructure on natural and cultural values.
- **Viability analysis** – indicative high level demand scenarios, costs and return on investment on a range of accommodation options.

1.3.1 Study limitations

COVID-19 presented some restrictions in travelling physically along the C2C and undertaking consultation and meetings with stakeholders in person. Despite these restrictions, TRC was still able to actively engage stakeholders through online video meetings, and a virtual C2C experience analysis was undertaken by TRC's inhouse trails specialist. However, consultations were not able to be conducted with Aboriginal organisations due to challenges as a result of COVID-19 communication limitations and isolation. Should work progress to more detailed planning in the future, consultation with Aboriginal organisations should be prioritised.

A second limitation of the study was the availability of data specific to the Cape to Cape Track. Whilst some track usage data exists based on pedestrian counters at visitor nodes, the track network consists of multiple access points used for both short walks and accessing the coast for other activities such as surfing. This makes it difficult to determine actual numbers undertaking walks of any particular length. This said, excellent anecdotal data was made available through stakeholder discussions. Once an estimate of the various uses of the track was made, this was verified with commercial operators and other stakeholders who were broadly in agreement with estimates.

1.4 Roadmap for this report

The Cape to Cape Eco Accommodation Pre-Feasibility Study Report is a culmination of the findings captured throughout the methodology stages and research documents. The Report includes:


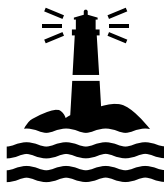


- **The C2C experience** - an overview and assessment of the current offer
- **Demand, trends and target markets** - measured against what makes a great walking experience
- **SWOT Analysis** and benchmarking the C2C against other 'must do' walking experiences
- **Future track priorities** – ecotourism accommodation, experiences, facilities, infrastructure, products and service development
- **Viability** – track modelling and measuring impact for eco accommodation and other priorities
- **Conclusions and recommendations** – the next steps towards the development of eco accommodation and other report recommendations.

2 The C2C Experience

2.1 Current offer

The Cape to Cape Track traverses through the iconic Margaret River region and WA’s most popular national park – Leeuwin-Naturaliste National Park (3.37M visitors 2018-2019).⁴ In addition to the national park, the region offers several drawcards such as local food and wine experiences, natural exploration along the coast including fossil and stalactite rich caves and the ancient Karri forest, and the historic Cape Leeuwin and Cape Naturaliste lighthouses. Some experiences are available in close proximity to the track, with others located off track requiring additional walking or transport.

Table 1. SUMMARY C2C OFFER

	<p>Commercial operations</p> <ul style="list-style-type: none"> • 6 x commercial tour operators (3 are WA based). • 1 x outdoor education learning experience (tailored for school groups) • 5 x transport providers • Several wineries packaging short (half day) walks with winery/dining experiences
	<p>Attractions (refer Figure 1)</p> <ul style="list-style-type: none"> • 17 lookouts • 3 historic lighthouses • 6 caves • 4 coastal bays <p>Many food, wine and artisan experiences particularly around Margaret River.</p>
	<p>Places to stay</p> <p>Campgrounds</p> <ul style="list-style-type: none"> • 7 campgrounds (4 x Cape Track walk only free campgrounds; 3 x Leeuwin-Naturaliste National Park fee based public campgrounds) <p>On / near track accommodation</p> <ul style="list-style-type: none"> • 34 near track commercial accommodation providers ranging from commercial caravan park / campgrounds to luxury accommodation (refer Figure 2). • Airbnb – 665 total available rentals along the C2C.⁵
	<p>Events</p> <ul style="list-style-type: none"> • Cape to Cape 4 Day MTB Race* • Group walks with Friends of Cape to Cape – members and others welcome. Most walks are escorted day walks, once per year and end-to-end walk is undertaken. <p>The broader Margaret River and Busselton Region hosts several events across the year including markets, performances, art, concerts, wine and gourmet festivals and adventure events such as surfing, Ironman, swimming, marathons and triathlons.</p>

**Note: The Cape to Cape 4 Day MTB Race is not held on the Cape to Cape walking track.*

⁴ Department of Biodiversity, Conservation and Attractions, 2020

⁵ www.airdna.co search: Margaret River Busselton Region accessed 25.5.2020

Figure 1. THE CAPE TO CAPE TRACK



2.1.1 Regional access

Driving from Perth southwest to Cape Naturaliste is 262 km or approximately three hours drive. The Track can be accessed at various stages and for those undertaking end-to-end it can be commenced at either Cape Naturaliste or Cape Leeuwin. There is no public transport to the Track, to access the Track and region, walkers can:

- Self-drive a personal or hire vehicle and leave it at Cape Naturaliste, finding alternative return arrangements (taxi, private bus)
- Taxi or charter bus ex-Perth – can also provide daily Track pick up services for those using off Track accommodation
- Daily private coach transport service from Perth to Margaret River, Yallingup, Busselton and Dunsborough
- If you can arrange your own transport to the region, some accommodation providers offer Track drop-off and pick-up
- Join a tour starting and finishing in Perth.

The Busselton-Margaret River Airport expansion and the new cruise ship facility will allow further increased tourism opportunities by opening the door to other inter-state and international markets.

2.1.2 Track access and sections

There are 71 access tracks / roads to the Cape to Cape along the approximately 125km track. 'Access points' are defined as any road, sealed, unsealed, 2WD, 4WD, maintained, unmaintained or restricted access that could feasibly be used to drop off / pick up / extract walkers from the Cape to Cape.

- 25 of these are 2WD accessible, the balance require a 4WD
- This averages to an access point every 2km.

This is a unique feature of the track, providing multiple possibilities to hop-off to experience local communities, products and attractions; choice of walk distance and duration to suit the individuals; and is quickly accessible during track emergencies.

Self-catering walkers traditionally undertake the C2C as a seven night end-to-end experience. This itinerary comprises of the following sections:

1. Cape Naturaliste to Yallingup (13 km)
2. Yallingup to Moses Rock (16.75 km)
3. Moses Rock to Gracetown (13 km)
4. Gracetown to Margaret River (20 km)
5. Margaret River to Boranup Forest (21.5 km)
6. Boranup Forest to Cosy Corner (20.5 km)
7. Cosy Corner to Cape Leeuwin (19km).



TOUR GROUP CAPE TO CAPE EXPLORER TOURS

2.1.3 Tour products

Walking tours

There are currently six commercial walking tour operators who conduct tours along the C2C, three of which are based in Western Australia and run the majority of the tours on the track. Each of the six operators commences and finishes their tours in Perth. All use off track commercial accommodation, with most choosing to stay at the one venue (glamping through to luxury) throughout the duration of their tour (each being a different property to other operators). Each operator provides transport daily to and from the accommodation to the next section of the track (full list at Appendix A).

Operator 'Walk into Luxury' is the only operator accredited to provide Tourism Australia's signature 'Great Walks of Australia' experience. They offer a 1-6 day experience delivering 'the best of' the C2C. Luxury accommodation and fully inclusive itineraries are offered.

The six operators combined advertise via their respective websites a total average of 75 departures per annum, with a general group size of 10-14. This does not factor in cancelled departures or private / chartered group walking tours. Tour operators usually conduct C2C walking tours during Autumn or Spring. No tours are conducted during the winter months of July and August, with operators noting the possibility of track flooding particularly at the Wilyabrup and Margaret River crossings making the track inaccessible. A 4km winter diversion for the Margaret River has been created to allow year round traverses. Hiking during the hot summer months of December and January is also not recommended – this is due to the higher temperatures and potential for heat exhaustion and dehydration. Summer is also a common time for bushfires which creates a substantial risk to walkers.

Other products

In addition to the walking tours offered, a large range of outdoor activities is also available including caving, abseiling, rock climbing, snorkelling, diving, mountain bike and 'fat bike' coastal riding in the region.

The availability of outdoor activities attracts 80% of all WA outdoor education programs (predominately for school groups) to the Cape to Cape region⁶. Some local private properties and a dedicated outdoor education camp are available for use by outdoor education groups. Activities also including walking and orienteering along sections of the C2C.

Synonymous with the region is the Margaret River food and wine offer. Several walking tour companies incorporate food and wine experiences into their itineraries. Additionally, a number of wineries offer day and overnight experiences (some out of Perth, others within the region) that include a short walk (generally less than a half day) on the Cape to Cape and a winery experience such as a long lunch.

Transport operators

Within the region, five local transport / shuttle bus operators are listed and promoted via the Friends of Cape to Cape and Trails WA. These operators offer pick-up and drop-off services at the start and finish of the walk, or provide a daily service for walkers undertaking shorter sections or staying in off track accommodation.

2.1.4 Accommodation

Commercial

Approximately 34 commercial accommodation options are available within 2 km of varying sections of the Track. Within 2 km of track is a comfortable maximum distance for walkers to walk to off-track accommodation, particularly after they have already likely walked a substantial distance for the day. Beyond the 2 km, accommodation options increase greatly, particularly within the Margaret River area. Options vary from bed and breakfasts, coastal lodges, hotels and commercial tourist parks offering cabin and camping options. Many commercial accommodation providers offer transport to and from sections of the Cape to Cape track.

Accommodation in the region averages 50-55% occupancy year-round, with peak periods occurring at Christmas and Easter as well as during events. Majority of the accommodation is defined as mid-range, with a small number of high-end properties.

Three new high-end properties close to the track (Margaret River and Smiths Beach) are in the planning phase, one of these was recently announced as a Marriot Group (Westin) property to be opened in 2023 at Margaret River.

There is also some land close to the track zoned ‘tourism development’, which is yet to attract investment (refer zoning map Figure 10). The Busselton-Margaret River Airport expansion and the new cruise ship facility are expected to drive increased visitation from inter-state and international markets, potentially creating additional market interest for property development from recognised accommodation developers and operators.

LUXURY
ACCOMMODATION
USED BY
GREAT WALKS
EXPERIENCE -
INJIDUP SPA
RETREAT



⁶ Perth, Outdoor WA

Campgrounds (non-commercial)

Along the northern section of the track, there are three small self-sufficient walker-only campsites offered. Sites are Mount Duckworth, Moses Rock and Ellenbrook. These campgrounds provide a picnic table, composting toilet and rainwater tank.

Towards the southern section of the track within the Leeuwin-Naturaliste National Park, DBCA manages four near to track campsites which are accessible to both walk-in and drive-in visitors. Each campground attracts fees and provides BBQs, shelters, toilets and rainwater facilities. The largest campsite, Conto Campground also requires pre-booking.

Airbnb

A total of 665 Airbnb accommodation options are currently active across the Margaret River Busselton region. Most offer the entire house for rent with multiple bedrooms.⁷ The number of properties available within each township includes:

Yallingup – 30	Margaret River – 430	Hamelin Bay – 8
Gracetown – 41	Redgate – 14	Leeuwin – 4
Prevally – 38	Boorunup – 1	Augusta – 99

Figure 2 provides an overview of available accommodation and distance to track.

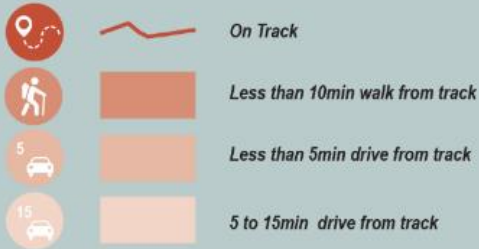


CAPE TO CAPE TRACK WALKER ONLY CAMPSITES

⁷ www.airdna.co – Margaret River / Busselton Region accessed: 25 May 2020

Figure 2. Overview of available accommodation along the C2C

Proximity to Track



Accommodation Locations



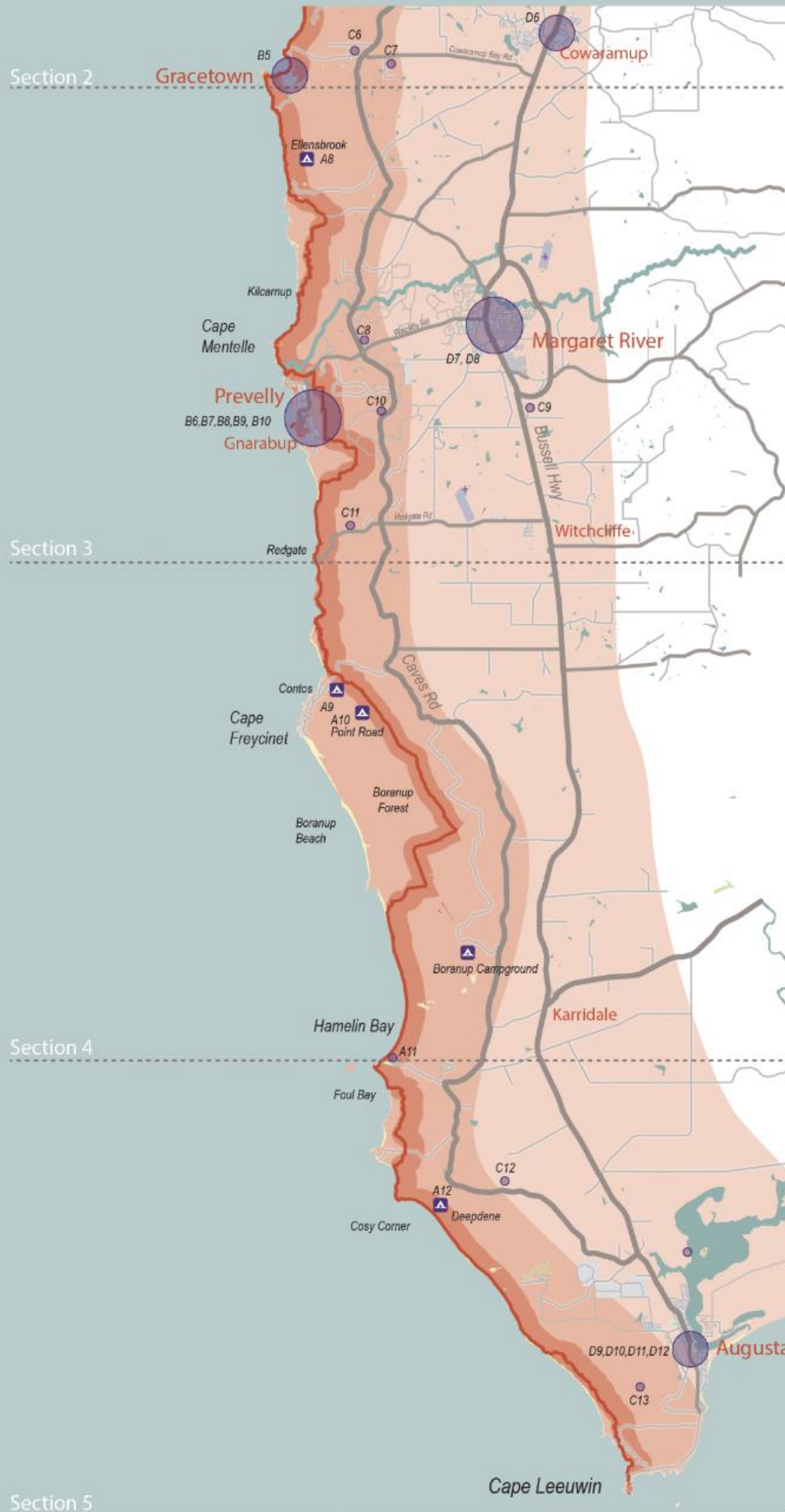
Accommodation - Section 1

- A1 - Mt Duckworth Campsite** (DBCA Campground icon)
- A2 - Yallingup Beach Campsite**
- A3 - Yallingup Holiday Homes, Resort & Apartments**
- A4 - Smiths Beach Resort**
- A5 - Canal Rocks Beachfront Apartments**
- A6 - Chandlers Smiths Beach Villas**
- B1 - Caves House Hotel**
- B2 - Seashells Yallingup**
- B3 - Caves Caravan Park**
- B4 - Injidup Spa Retreat**
- B5 - Injidup Surf Shack**
- C1 - Pullman Bunker Bay Resort**
- C2 - Yallingup Forest Resort**
- C3 - Sienna Lodge**
- C4 - Wyadup Brook Cottages**
- D1 - Eagle Bay Holiday Homes & Apartments**
- D2 - Dunsborough Holiday Homes & Apartments**
- D3 - Quindalup Holiday Homes**

Accommodation - Section 2

- A7 - Moses Rock Campsite** (DBCA Campground icon)
- B5 - Gracetown Holiday Homes**
- C5 - Cape Lodge**
- C6 - Gracetown Caravan Park**
- C7 - Olio Bello Glamping**
- D6 - Cowaramup Holiday Homes & Apartments**





Accommodation - Section 3



A8 - Ellenbrook Campsite ▲



B6 - Surfpoint Resort
B7 - Prevelly Caravan Park
B8 - Beachside Prevelly Villas
B9 - Margarets Beach Resort
B10 - Other Prevelly & Gnarabup Holiday Homes & Apartments



C8 - Margaret River Bed and Breakfast
C9 - Glenbrook Estate
C10 - Acacia Chalets
C11 - Redgate Beach Escape



D7 - Margaret River Holiday Homes and Apartments
D8 - Margarets Forest Holiday Apartments

Accommodation - Section 4



A9 - Contos Campground ▲
A10 - Point Road Campground ▲
A11 - Hamelin Bay Caravan Park



B11 - Boranup Campground (3km from track) ▲

Accommodation - Section 5



A12 - Deepdene Campsite ▲



C12 - Wrenwood Chalets
C13 - Sheoak Chalets



D9 - Experience Augusta Accommodation
D10 - Anchors @ Augusta
D11 - Augusta Hotel Motel
D12 - Other Augusta Holiday Homes

Section 5

3 Demand, trends & target markets

3.1 The Demand

3.1.1 Cape to Cape Track use

There is currently minimal information available regarding actual users of the C2C track and its existing capacity. The Department of Biodiversity, Conservation and Attractions (DBCA) has pedestrian counters along some stages of the track but have advised data collected has low reliability. This is due to the multiple entry and exist points along the track and the difficulty in assessing short day use versus overnight use and overall duration on the track.

Based on limited data plus conversations with stakeholders for this project, use estimates of the C2C have been verified with local operators and are summarised in the table below.⁸

Table 2. Summary of C2C use, user type, on track camping and growth trends

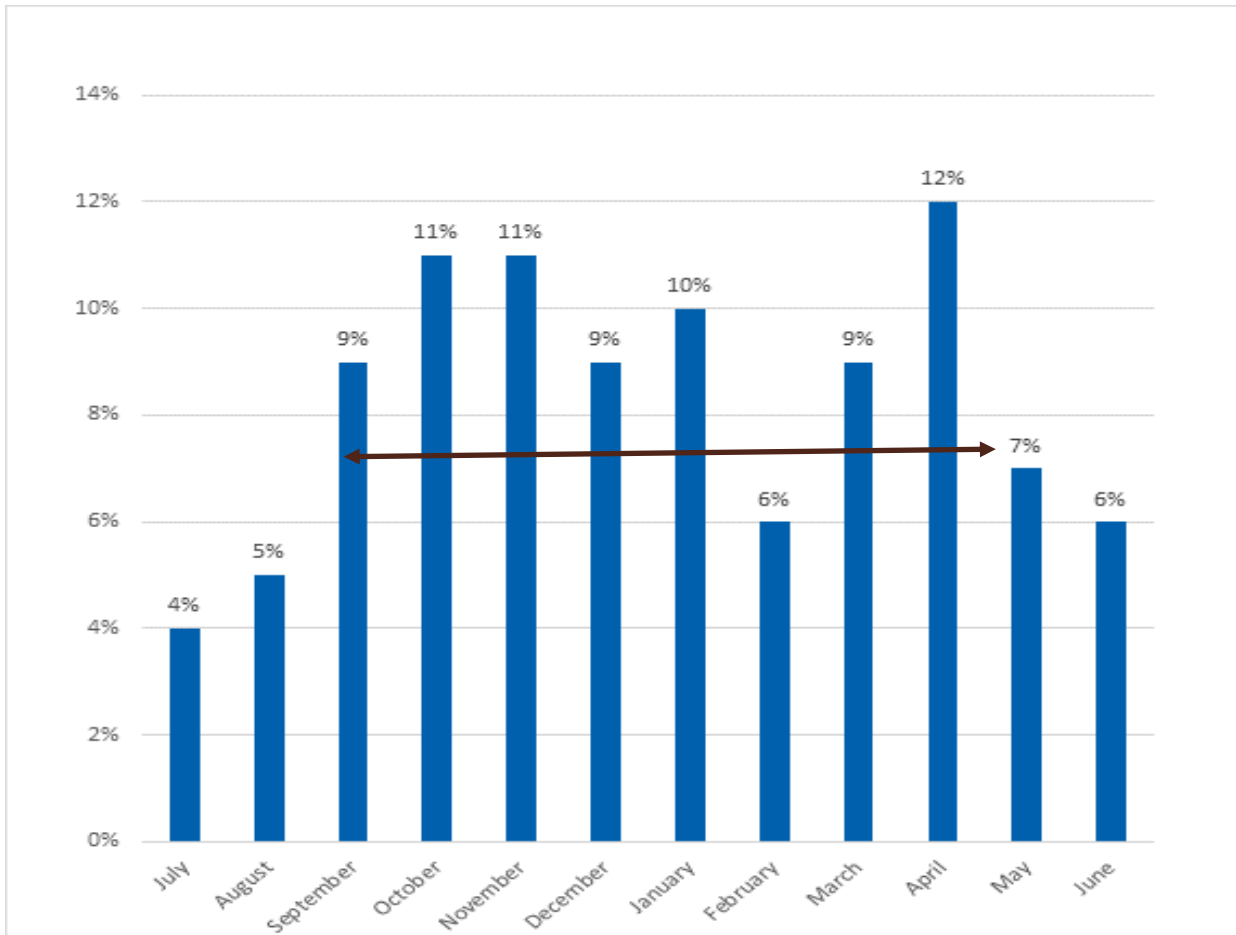
<p>Walkers</p> <ul style="list-style-type: none"> • In excess of 15,000 walkers /annum (includes, short, long, overnight walkers) • Estimate 30% do overnight (varying lengths/itineraries) • 1000 per annum walk end to end • 2000 per annum undertake fully supported walks (part of track, off track accommodation included) • 3000 per annum undertake partially supported walks using off track accommodation and/or transport services • Several operators (including wineries) offer combined day experiences of a half day walk followed by winery/restaurant. 	<p>User type</p> <ul style="list-style-type: none"> • Independent walkers • Friends and families • People with different physical abilities • Education and schools • Senior citizens • Backpackers • Recreational and other organisations, such as scouts and churches • Domestic, interstate, intrastate and international • Self-guided and guided • Trail runners • Corporate • Commercial.
<p>On track camping</p> <ul style="list-style-type: none"> • Estimated camping nights associated with C2C usage is about 16,000. <p>Visit night distribution estimates (not including commercial campgrounds)</p> <ul style="list-style-type: none"> • Mt Duckworth: 20% • Moses: 20% • Ellensbrook: 15% • Conto campground: 40% • Deepdene: 5% 	<p>Growth trend</p> <ul style="list-style-type: none"> • Counter detections are growing at an average of 1.1% per year for the last 3 years.

⁸ Data collected through DBCA and pers comms with a range of stakeholders contributing to this project

3.1.2 Seasonality of use

Commercial operators report that the majority of walking occurs between September and May, many not offering tours during winter due to potential track flooding. The data presented in Figure 3 is consistent with this trend, with July and August showing the lowest use.

Figure 3. Source Department of Biodiversity, Culture and Attractions



3.1.3 Bushwalking in the Cape to Cape region⁹

The most recent Shire of Augusta-Margaret River visitation report provides a three year average overview, reporting a total of 673,000 visitors year end 2018. Of this figure, 72% were intrastate, 14% from interstate and 14% were international visitors.¹⁰ Specific to bushwalking, a market review of bushwalking in the Cape to Cape region (incorporating Margaret River, Augusta and Busselton) has been compiled using Tourism Research Australia (TRA) survey data, with full results available at Appendix C. Briefly, the data shows that 292,000 visitors participated in bushwalking during 2019 – an increase of 63,000 visitors from 2015.

Cape to Cape Region visitor profile

The characteristics of both domestic and international visitors to the Cape to Cape Region are very similar. Figure 4 illustrates major characteristics and travel behaviour of Cape to Cape region domestic and international markets, based on a three-year averaged observation to 2019.

⁹ Cape to Cape region encompasses the 3 SA2s of Margaret River, Augusta and Busselton region as per ABS mapping

¹⁰ Shire of Augusta-Margaret River, overnight visitor factsheet Feb 2020, Tourism WA

Figure 4. Major characteristics of bushwalking visitors in Margaret River / Cape to Cape regions



Full graphs capturing TRA domestic data for bushwalking visitors in the Cape to Cape Region can be viewed at Appendix C.

3.2 Trends

3.2.1 Walking market in Australia

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

- International visitors engaging in bushwalking and rainforest walks increased by 7% to 1.9 million per annum (2018).¹¹
- Domestic overnight trips involving activities such as bushwalking increased 9% to 12.8 million year end December 2018.
- Based on the UNWTO estimates of the walking market globally, Australia captures less than 1% of the global trade in extended walks (multi-day), whereas our neighbours in New Zealand have nearly twice that share.¹²
- It is estimated that around 3% of all walks in Australia are now extended or multi-night walks with over 50 promoted as overnight walks.

Western Australia

With more than 300 trails across the State offering varying experiences, it is difficult to quantify the overall number of actual bushwalkers in Western Australia. This lack of available data and the need to measure, monitor and manage future trail use, has been recognised within the Draft WA Hiking Strategy 2019 – 2029. Relevant available data includes:

- More than 20 million visits to national parks and reserves in 2017 (many parks are home to the State's walking tracks)¹³
- The 1000 km Bibbulman Track attracted 80,000 people undertaking a short recreational walk along the track. At present the 1000 km end to end experience (8-10 weeks) is only undertaken by around 200 walkers annually.¹⁴
- Participating in treks, trails and / or hikes is also rated by visitors to WA as one of the Top 5 motivators for travelling to the State.¹⁵
- For Western Australians, walking and running are two of the top five physical activities undertaken in the State. It is estimated that annually 93,802 Western Australians participate in bushwalking activities.¹⁶

¹¹ TRA International Visitors in Australia – Year ending September 2018.

¹² Adventure Travel Trade Association Report 2018-19

¹³ DBCA WA national park visitation 2017

¹⁴ Bibbulmun Track Foundation – 2017 Vision Workshop Full Report

¹⁵ Visitor Experiences and Expectations Research 2018-2019

¹⁶ AusPlay Bushwalking 2019 survey results, Australian Sports Commission

3.2.2 Guided and premium walking experiences

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

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

Due in part to the restricted availability, many of the Australian 'Great Walks' operated at or near 100% capacity, especially in peak periods.¹⁷

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

To cater for the discerning High Value Traveller, the Signature Experiences Program was developed by Tourism Australia, incorporating the 'Best of Australia'. Great Walks of Australia is part of this program and consists of a marketing collective of Australia's multi-day guided walks. Each product within the collective is delivered by an independent operator who offers an expected level of quality, usually including luxury lodges, guided experiences, all-inclusive multi day walks ranging from 3-6 days. One operator on the Cape to Cape is included within the Great Walks of Australia and, as such, this is the only WA track currently in this program. In contrast, Tasmania currently offers three Great Walks experiences.

Although many visitors both domestic and international participate in bushwalking during their holiday, guided and accommodated overnight walking visitors are a relatively low volume segment. Despite being low volume, this is a high yielding market. Comparatively, it is estimated that around 200,000 Australians participate in annual high end extended or multi-night walks, only 40,000 of them do these walks within Australia. In 2016 it was estimated that nearly \$250 million per annum in Australian 'walking money' was going offshore.¹⁸

This presents a significant opportunity for WA, with the C2C currently the only walk in the State that has an operator that meets Great Walk of Australia status. With a range of walking experiences available across the State (e.g. Bibbulmun Track), there is very little product supporting overnight walking experiences. With the High Value Traveller a core target market for WA, further investigation into walking opportunities and product development in addition to the Cape to Cape should be explored.

Although low volume, this is a very high value market segment. Existing Great Walks of Australia operators reported running at close to 100% capacity in 2017, demonstrating the demand for this type of experience.

¹⁷ Commercially confidential discussions with industry specialists

¹⁸ Carruthers, F., Former rivals Geoff Dixon and Brett Godfrey partner in walking tourism venture, Financial Review Magazine, 2016

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

3.2.3 Impact of COVID-19

The severe and ongoing impact of COVID-19 is requiring a stocktake from all destinations, with UNWTO reporting 96% of destinations have imposed travel restrictions. COVID-19 is reshaping the tourism industry - businesses and market demand are unlikely to return in the same position as pre-COVID. Relying on historic data to predict future travel behaviour will not be possible, particularly for international markets.

Tourism has consistently been one of the most resilient economic sectors and fastest to recover after crisis, largely because of people's desire to travel, but will in future be tempered by health concerns that arise from the movement of people. Any economic activity that requires people to move to create value, or depends on proximity between people for trade, will have to change radically.

While it is impossible at this time to predict the future with a strong degree of certainty a range of trends and issues are becoming apparent:

- Confidence in shorter trips – safety of travelling closer to home
- International tourism will take a number of years to recover – higher cost travel, less disposable incomes and health concerns will all impact international travel decisions.
- Social distancing is here to stay - Although not yet fully understood, the pandemic will also result in a range of social and behavioural changes which will change how customers consume tourism and leisure experiences. This may impact number of users at attractions or at venues with new enforced capacities and limits.
- New focus on hygiene - Going forward, consumers are going to pay greater attention to health and hygiene standards – alongside quality and price, hygiene will be an added customer trust/assurance factor to consider. This will need to transpire across not only businesses, but destinations.
- Preference for drive tourism and touring trips - travellers will prefer the safety and isolation of their own private vehicle, which may mean shorter journeys as opposed to flying.
- Local travel and as permitted VFR travel – with existing domestic border restrictions in place, people will seek travel experiences within their 'own backyards'. This will see an increase in day trips particularly to national parks and village communities (e.g. Margaret River). As restrictions lift, there will be a desire to reconnect with families and friends.
- Renewed consumer interest in our surroundings - Places with plenty of space are likely to be favoured over crowded places i.e. the natural environment rather than city breaks; the great outdoors rather than indoor attractions, and self-catering rather than hotels. Examples of national parks and reserves re-opening across Australia has demonstrated this desire for people to focus on wellbeing, sustainability and a stronger sense of community.
- Changes in market purchases and preferences – with a preference to support local communities and environments, consumers may focus on purchases and travel choices that contribute to the greater good. Value for money will also be a consideration, with many individuals, families and communities impacted financially during the pandemic.

- International customers are an important component in the luxury fully guided walking segment – demand will clearly be restricted in the short to medium term, with future access only provided to travellers from COVID-19 ‘safe’ countries.¹⁹

3.3 Target market profiles

3.3.1 Western Australia

Domestic

In 2018, Tourism WA developed six domestic market audience profiles:

- Escape and Connect travellers
- Bright Lights travellers
- Off the Beaten Track travellers
- Family Fun travellers
- Relax and Unwind travellers
- Culture Vulture travellers.²⁰

The characteristics from each segment which have the strongest strategic alignment with this eco-accommodation study are outlined in Table 4.

Table 3. Characteristics of domestic target market segments likely to be interested in a C2C eco-accommodation experience

Tourism WA market segment	Personality	Demographics	Alignment with eco-accommodation	Holiday needs and behaviours
PRIMARY SEGMENTS MOST LIKELY TO BE ATTRACTED TO A C2C EXPERIENCE				
Escape and Connect travellers	Like to challenge themselves – looking to disconnect from daily life stress and reconnect with their partner	Predominately 35-49 yrs (mid-career professionals) and 50-65 (towards retirement)	Will pay more for quality experience. Likely to choose higher end accommodation Higher average spend per trip.	Enjoys food and wine experiences and sightseeing.
Off the Beaten Track travellers	Love the outdoors especially hiking and camping. Are environmental and love the simple life.	Older demographic, most likely to be empty nesters or have grown-up children (16 years or	Most likely to stay in standard hotel/motels or resorts, with friends and family, or in caravanning and camping accommodation.	Avoiding crowds and ‘touristy’ destinations. Nature and wildlife experiences, particularly those that are unique, and balancing active, outdoor adventures with peace and relaxation. Have a preference for regional destinations.

¹⁹ Earthcheck analysis of COVID-19 impacts on Australian tourism and the C2C experience May 2020

²⁰ <https://www.tourism.wa.gov.au/marketing/Domestic-and-international-marketing/Pages/Domestic-market-profiles.aspx#/>

Tourism WA market segment	Personality	Demographics	Alignment with eco-accommodation	Holiday needs and behaviours
PRIMARY SEGMENTS MOST LIKELY TO BE ATTRACTED TO A C2C EXPERIENCE				
		older) at home (50+)	Careful with their spending, and want to know they are getting the best value for money	
Culture Vulture travellers	<p>Are health conscious and stay active and eat healthily.</p> <p>Are life-long learners who are keen to try new things.</p> <p>Like to challenge themselves and believe in taking risks.</p>	Older demographic (60% are aged 50+ years).	<p>Most likely to stay in 4 star or standard hotel accommodation or with friends and family.</p> <p>Are happy to pay for quality and spend more to save time.</p>	<p>All about discovery and learning – seeing and doing new things.</p> <p>Enjoy sightseeing, learning about a destination’s history and heritage, visiting cultural attractions or attending cultural events, and experiencing local food and wine.</p>
SECONDARY SEGMENTS LIKELY TO BE ATTRACTED TO A C2C EXPERIENCE				
Family Fun travellers	<p>Like convenience and routine to maximise family time.</p> <p>Are bargain hunters and budget conscious.</p>	<p>Most likely to be parents and have children under the age of 16 years living in their household.</p> <p>Over half this segment are aged between 35-49.</p>	<p>If they aren’t staying with friends or family, they are most likely to stay in a standard hotel or self-contained apartment. Seek value for money.</p>	<p>Having fun as a family.</p> <p>Coastal and self-drive holidays</p> <p>Seek out destinations, facilities, and experiences that are family-friendly.</p>
Relax and Rewind travellers	<p>Keep active with light exercise like walking, golf and pilates.</p> <p>Take life slowly and enjoy the simple pleasures.</p> <p>Seek peace and comfort.</p>	<p>Majority are aged 50+ years and are most likely to be empty nesters or have grown up children (aged 16 years or above) in their household.</p>	<p>Most likely to stay in 4 star or standard hotel accommodation or with friends and family.</p> <p>Affordability is a major consideration.</p>	<p>Enjoy balancing their rest and relaxation with sightseeing, food and wine experiences, and some shopping.</p> <p>A chance to connect with partner.</p>

Escape and Connect, Off the Beaten Track and Culture Vulture travellers are the most likely to engage in a C2C ecotourism experience.

Bright Lights travellers who are seeking city-based experiences with events, dining and shopping, have not been included in this list as potential visitors seeking this type of experience.

International

WA’s major international markets include the United Kingdom, Germany/ Switzerland, New Zealand, Singapore, Malaysia, Indonesia, United States of America, India, China, Hong Kong and Japan. Each of these nationalities attract Tourism Australia’s international target market – the **High Value Traveller (HVT)**.

The HVT generally spend more, disperse into regional areas and stay longer, desiring nature and wildlife and aquatic and coastal experiences:

Figure 5. The High Value Traveller – Australia’s international target market



To cater for the discerning High Value Traveller, the Signature Experiences Program was developed by Tourism Australia, incorporating the ‘Best of Australia’ from Cultural tours, Great Walks and Winery Experiences. Products are catered to the needs of the high value international traveller who is ‘seeking out travel destinations that deliver unique and authentic experiences which tap into their passion points’.²¹

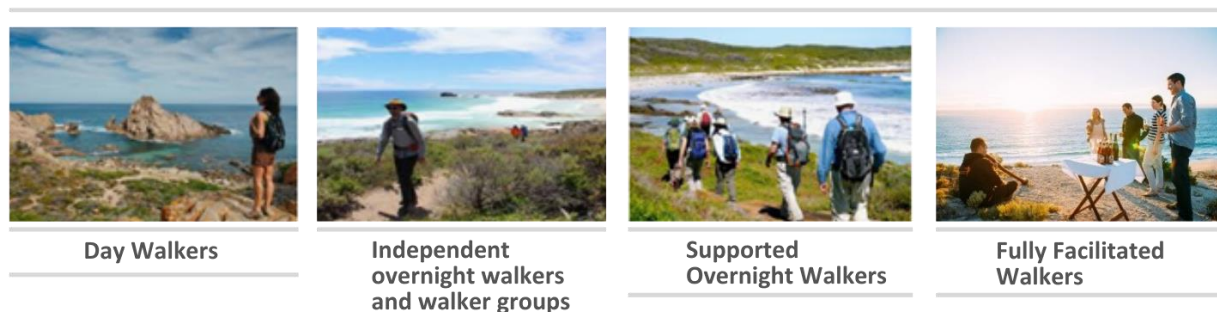
World class nature and wildlife, coastal experiences and good food, wine and local cuisine are predominant drawcards for WA’s HVT Target Markets. The Margaret River / Busselton Region can certainly deliver on these expectations, however the HVT market is generally short on time and has expectations of travelling to a range of WA or Australian regions during their visit.

To compete for the valuable time of the HVT market, C2C experiences would need to lend themselves to either packaged short walking experiences inclusive of eco-accommodation, or day walks with multiple activities incorporating food and wine, coastal and nature / wildlife encounters.



3.3.2 Target Market Segments



Four core walking target market segments have been identified for the C2C experience:





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

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

Table 4. Core Target markets for the Cape to Cape Track experience

Walker type	Needs
<p>Day walkers</p> 	<ul style="list-style-type: none"> • Distance: 20 minute walks up to 15–20 km day treks. • Demographic: Popular with almost all demographics and age groups, often caters for all levels of fitness and accessibility needs. Favoured by ‘Active Families’. • Expectations: Trailheads with clear signage, points of interest, visitor interpretation and trail marking (65% do not plan or research prior to a walk). Return loops in preference to one-way and return trails.
<p>Independent overnight walkers and overnight walking groups</p> 	<ul style="list-style-type: none"> • Distance: Overnight stops spaced every 10–20 km (depending on gradient). • Demographic: <i>Younger Adults, Women Travellers</i> and <i>Active 55+</i> groups. Experienced trail walkers who bring all their own gear. Usually walk with a small group 2-4 people. • Expectations: Mix of grades (2-5) preferable, spend 1-3 nights. Provision of water, toilets, designated mid or high level camping areas, common shelters and separation from large groups (happy to share with other independent walkers). Shuttles for off trail accommodation. Will seek pre and post walk accommodation and experiences. • Example: The Three Capes Walk in Tasmania has catered well to this market, with the trail and facilities designed to suit. This is evidenced by increasing demand of walkers booking and undertaking this walk.

Walker type	Needs
<p>Supported overnight walkers</p> 	<ul style="list-style-type: none"> • Distance: Overnight stops / trailhead access spaced every 10 to 16 km (depending on gradient) • Demographic: <i>Younger Adults, Women Travellers</i> and <i>Active 55+</i> groups. Seeking an experience where they don't have to bring all their own gear at a mid-range level. • Expectations: Mix of gradients (2-5 grading) with some sense of adventure challenges. Walking with a guide or local tour operator. Seeking unique, iconic and 'brag-able' experiences. Comfortable tents (glamping) or roofed accommodation (cabins) separated from other users located within 1 km of the trail (or a shuttle to take to accommodation further away). Trail options/accommodation for 1 to 3 nights as typically walking 1–3 nights on the trail plus one night before or after the trail journey.
<p>Fully facilitated/ supported walkers</p> 	<ul style="list-style-type: none"> • Distance: Overnight stops/trailhead access points spaced every 10 to 16 km with a mix of gradients offered • Demographic: High Value Travellers - Highest average spend of all walk markets, an average of \$2,360 per tril and average length of 4 nights stay (\$590 pre day)²² • Expectations: Full commercial, seamless, all inclusive high quality guided experience. Comfortable through to luxury roofed accommodation separated from other users located within 1 km of the trail (or a shuttle to take to accommodation further away). Sense of remoteness, exclusivity. Trail options/accommodation for 1 to 3 nights as typically walking 1–3 nights on the best trail sections, plus one night before or after the trail journey.

3.3.3 Summary

In summary, the walking market both overseas and in Australia is growing and guided and self guided accommodated walks are one of the fastest growing tourism products.

There is an existing market for nature-based activities and bushwalking in the region and considerable potential for growth in Cape to Cape walkers. Recent evidence has shown more people getting out into nature as a result of recent Covid19 restrictions. This trend is likely to continue with more people interested in outdoor activities.

More resilient, and predominantly younger travelers will probably be the first to return to remoter and more adventurous destinations - gradually and in limited numbers. There will likely be an acceleration of the recent trend amongst millennials, whereby they want to feel their major purchases are contributing to the greater good (e.g. environmental conservation, community livelihoods etc.)

More affluent walkers who often undertake high end walks overseas are likely to do them domestically whilst travel is restricted, or they feel safer at home.

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

4 Assessment of Cape to Cape

4.1 Assessment of the current C2C experience

Consistent with great walk experiences, a range of track elements have been assessed including ease of pre-walk planning and awareness of walk, track access, available track products, accommodation, on track facilities and the overall walk experience. Each element has been rated as either:



Poor – substantial work is required



Fair – experience is ok, but improvements can be made



Fair-Good – some minor improvements to be made















Good – currently a positive experience

Assessment of the C2C was done via a range of means including:

- Desktop research including user feedback
- Mapping and assessment of access points and available facilities, products and services
- Desktop C2C experience planning (from an intended walker perspective)
- Stakeholder consultation
- Past track knowledge and walk user interviews.

Table 5. C2C Track assessment overview

TRACK ELEMENT	COMMENTS	RATING
Planning 	<p>No one-stop-shop or online planning tool.</p> <ul style="list-style-type: none"> • Friends of C2C provides an overview of a ‘five section’ walk which can be done between 4-8 days – very minimal information on suggested itineraries, section lengths, physical requirements, access points, terrain and re-supply options. • No ‘official’ or singular planning tool is offered – walkers must contact each organisation / business individually. • Online search ‘Cape to Cape’, is dominated by commercial tour operators. Non-commercial sites such as WA Parks, Trails WA and Friends of the C2C appear much lower in the list of options. • Accommodation presented via Trails WA and Friends of C2C websites is an overview only. Need to visit each providers website for full details. • A list of locally based private hire / taxi services is listed on Friends of C2C website providing pick-up / drop off from the track. 	Poor 
Access 	<ul style="list-style-type: none"> • Access via private vehicle, coach transport or tour. No public bus or dedicated shuttle service is provided. • In region, a range of taxi/private hire vehicles offer shuttles and transport if pre-booked in advance. • 71 access points documented within this study, however there is minimal advice about best points of pick-up / drop off. • Seasonal impacts with flooded river crossings preventing safe access. 	Fair-Good 

TRACK ELEMENT	COMMENTS	RATING
Product 	<ul style="list-style-type: none"> Guided and semi-led options – experiences are generally expensive and all inclusive, reducing ability for flexible options. Six commercial operators already exist offering a combined total of 75 annual scheduled departures (up to 1,050 pax at full capacity). Minimal linked information available about other products and experiences along the track. 	Fair 
Accommodation 	<p>Camping (non-commercial)</p> <p>Lacks logistical ability to be self-supported, especially if seeking all-wilderness (camping) end-to-end on track. Some sections of the track are long (up to 31km) with no self-camp options, requiring current users to opt for commercial accommodation on 1-2 of the nights.</p> <p>Accommodated options</p> <ul style="list-style-type: none"> A large range of accommodation appears to be available near to the track when searching the Margaret River Busselton Tourism site and Airbnb. Some venues are also offering complementary track transport services. Much accommodation is self-catering (beach houses), cabins or mid-range. There is currently limited high-end accommodation, however planning for two new high-end venues is in progress and a third has recently been announced. Reduced availability of nearby accommodation within the southern section of the walk. 	Fair-Good 
On track facilities 	<ul style="list-style-type: none"> The 4 x walker only campsites along the north of the track are very small with minimal facilities (7 sites). Should visitation increase on the track, sites may experience overcrowding and environmental encroachment. Track campsites are not evenly spaced. Some overnight options are closer together (e.g. 11 km), with others potentially requiring up to 31km of walking. Minimal advice on available re-supply options (food, water). Rainwater available at track campsites, however quality cannot be assured, with boiling recommended. Other than track campsites, minimal information is provided about other on track facilities (toilets, picnic tables, trail heads, points of interest). Areas along the track have poor signage and way-finding. 	Poor 
Walk experience 	<ul style="list-style-type: none"> Spectacular scenery and vantage points Track condition poor in many sections including long sections of beach walking Daily distance mix not always ideal (varies from 11 km up to a possible 28km per day). Well suited to supported / guided / off track accommodated experiences where drop off/pick-ups are arranged, with many pick up/drop off points available. Query on routing of walk: sub-par experience compared to other 'Great Walk' products when on 4WD / featureless backcountry. Requires in situ trail audit to assess. Experience of walking and sleeping along the track is only available to some degree via self-sufficient camping. All other accommodation requires walkers to leave the track and walk to nearby available accommodation, or arrange independent pick-up transport. 	Fair 

4.2 Stakeholder consultation

Consultation was conducted separately with DBCA, Friends of C2C, commercial walking operators, tourism organisations, local government and transport providers. It is to be noted that consultations were not able to be conducted with Aboriginal organisations due to challenges as a result of COVID-19 communication limitations and isolation. Should work progress to more detailed planning in the future, consultation with Aboriginal Organisations should be prioritised.

The following is a summary of the issues emerging from the consultation:

Planning

- Any development will require comprehensive planning and consultation, including amendments to plan of management
- Cape to Cape Strategic Plan including the vision need updating
- Current Strategic Plan does not provide for on track accommodation
- Need to have a holistic approach and strategy for trails, their development, governance, funding and maintenance.

Values

- The national park is linear and fragmented with significant nature and cultural values, a sense of remoteness and potential for visual impacts.

Track

- Recognize the need for investment in long term capital and maintenance program to underpin environmental integrity of the track itself
- This is the highest day use national park in WA with the most day use sites and multiple entry points
- Whilst there are multiple trail heads, the track could accommodate many more walkers
- The track needs significant investment to get it to an appropriate standard of construction, appropriate alignment, management of erosion, provision of amenities and maintenance - it can't be a world class experience until the track infrastructure is upgraded
- River crossings need attention if year-round walking is to be encouraged. With flooding occurring particularly during the winter months, sections of the trail (specifically Margaret and Wilyabrup River crossings) become inaccessible. This is preventing the trail from being an all weather year round experience.
- Some sections are grade 4, long stretches of beach walking, sections eroding into the sea.

Experience

- Original vision was as a “walk for all” – varying lengths from short to “end to end” and including sections suited to access for all
- Strength of the product and point of difference is in the off-track accommodation, step on step off experiences and transport services and interaction with the region
- The track is suited to walking in segments from trailhead access points
- Most walkers also undertake other experiences
- Majority of clients are seeking an integrated experience of the walk and other destination assets

- Less people walk the southern sections of the track
- Most do not want to do full walk, but selected highlights
- As well as walking tour operators there are several day and overnight products involving a half day walk and a winery experience – these are popular with international market.
- Enables a mix of itineraries
- Even mix of “serious” walkers who do the walk only, and others who will include tourist experiences such as wineries etc

Challenges

- Vehicles are encroaching on some visitor sites
- Friends do a fantastic job, but it is not sustainable and budget inadequate
- Demand for large groups requiring their coach transfers to the walk has dropped off in the last 8 years or so.

Accommodation

- Contos and Jarahdene are suitable for glamping or similar, but other Cape to Cape sites (Duckworth, Moses, Ellensbrook and Deepdene) need to be maintained for independent and group camping
- Any additional accommodation needs to be off the track, and government investment in accommodation would be competing with the private sector.
- Current on track camping permitted is low impact and small scale
- Need to consider Cape to Cape accommodation in the context of all trail experiences for the region
- Accommodation on track would
 - add diversity to existing tourism accommodation
 - attract new markets
- Existing regional accommodation is not at capacity – on average 55%/annum but at capacity Christmas, Easter, school holidays and events
- Estimate 1700 beds in share economy
- Gap is in higher end accommodation but some in pipeline
- Need ‘meaningful’ spacing between overnight nodes on track
- Prefer base at one accommodation with daily transport to trailheads all of which are within easy distance and readily accessible by Caves Road
- Could complement existing experience with trail upgrade and on trail cabins/shelters
- Feel there is enough volume and variety of accommodation to service current walker demand.
- Anything that offers a self-catering option is more popular than traditional hotel rooms
- Possibilities for accommodation exist on private land adjacent to the track
- Feel there are limited locations on track for any accommodation, without impact the values and experience.

Opportunities

- Anticipate the direct flights to Busselton will attract some new accommodation brands to the region.
- Continue to promote Cape to Cape as an integrated walk/destination experience.
- DBCA charges park use fees elsewhere but local decision not to charge for Cape to Cape/ Leeuwin Naturaliste national park.
- Other regional trail products (eg Wadandi, Meelup Track) also have considerable potential.

4.2.1 Recommendations from stakeholder consultation

Based on the feedback received, recommendations include:

- **A planning framework** – aligning with the WA Bushwalking Strategy and Trails Blueprint, develop a regional trails master plan (connecting the regional network) and localised C2C master plan. The master plan would articulate the regional and trail specific visions and values, define a governance structure, prioritise projects with indicative funding, recommend appropriate resourcing and provide an implementation schedule.
- **Track management and maintenance** – stemming from the master plan, a track management and maintenance program would be established to ensure ongoing track repairs, maintenance, consistent standards, upgrades, management and allocation of appropriate resources. This includes addressing needs voiced such as river crossings and track flooding, erosion, infrastructure (including signage) and amenities).
- **Experience** – the existing experiences and values are strengths of the C2C. Packaging and promoting this through an easy planning tool (on-stop-shop website, trails centre, app) will bring greater awareness of the diversity and options available.
- **Accommodation** – feedback relating to on-track accommodation is more supportive of improving the existing assets such as the Contos and Jarahdene campsites. With existing regional accommodation not at capacity, a large range of share economy beds and high-end accommodation plans in the pipeline, additional accommodation is not generally supported at this time. Commercial operators also noted visitors undertaking guided experiences preferred to have one base for accommodation with transfers provided to and from trail heads daily (the experience which they are already offering).

4.3 Itineraries and distances

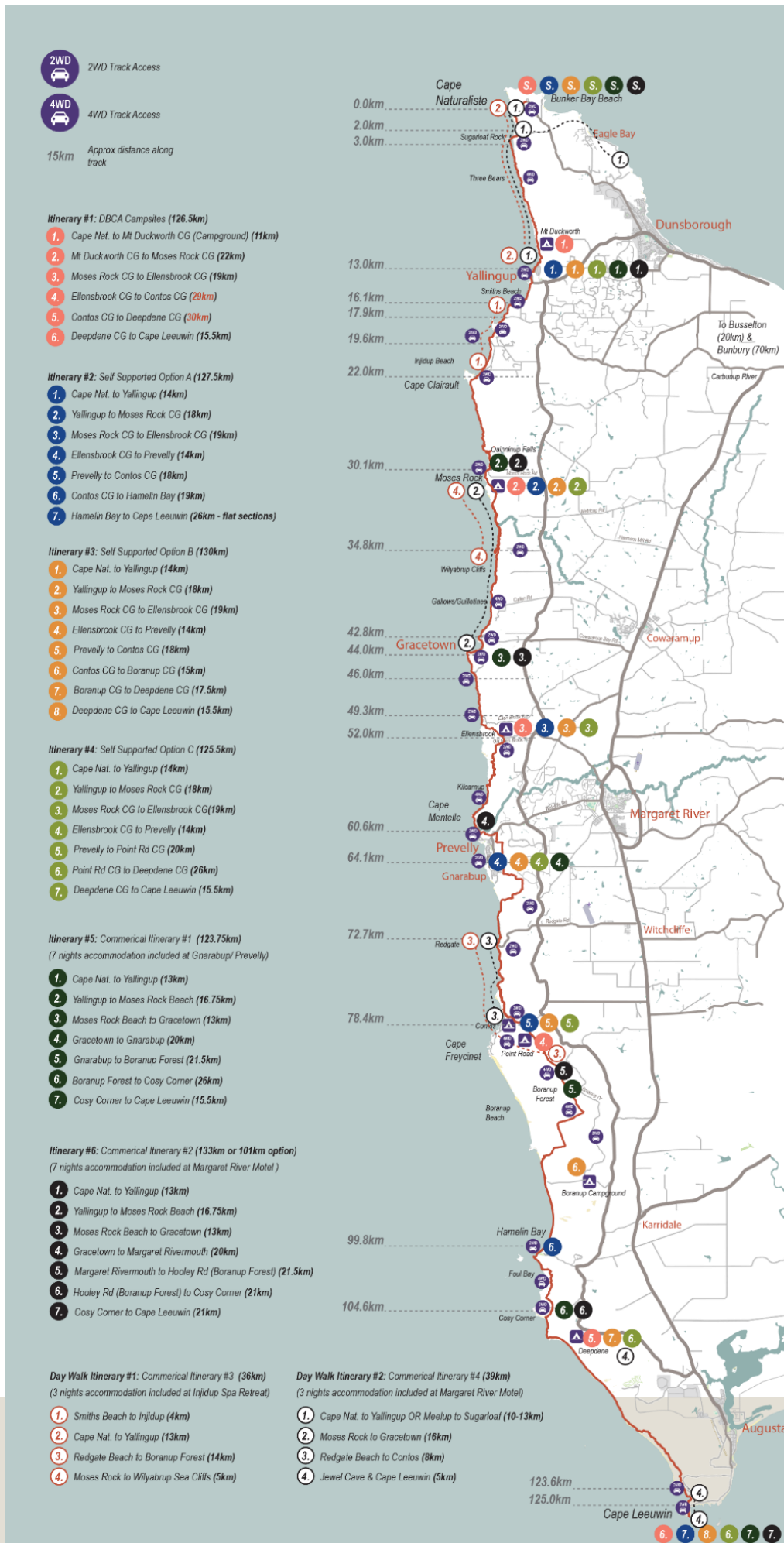
Walking distances and duration have been reviewed against existing ‘Great’ and iconic multi day walking experiences with optional itineraries for the C2C. Preferred walk duration of the C2C is not actively promoted, with both the Friends of C2C website and commercial operators suggesting the walk can be done in 4-8 days. The below table shows potential itineraries and distances per day on the C2C, demonstrating some sections requiring extensive walking if duration is reduced, or where DBCA accommodation on track is not available. In general, distances of greater than 15km each day are not preferred by supported walkers, whilst some independent walkers will be prepared to walk more than 20km on some days.

Table 6. Possible C2C itineraries and average daily walking distances compared with other iconic multi-day walks

Itinerary	D1	D2	D3	D4	D5	D6	D7	D8	TOTAL
Cape to Cape #1 DBCA on track accom only.	11	22	19	31	28	15.5	x	x	126.5
Cape to Cape #2 (DBCA + off track accommodation)	13-14	18	19	14	18	19	26.5	x	127.5
Cape to Cape #3 (DBCA + off track)	13-14	18	19	14	18	15	17.5	15.5	130
Cape to Cape #4 (DBCA + off track)	13-14	18	19	14	18	28	15.5	x	125.5
Cape to Cape #5 (DBCA + off track)	13-14	18	19	16-17	13	28	15.5	x	124.5
Great Ocean Walk #1	26.5	24	16	18	19.5	x	x	x	100
Great Ocean Walk #2	18.5	20.5	16.5	12.4	14.2	14.4	15.1	x	100
Great Ocean Walk #3	10.3	13.3	11.4	9.8	15.3	14.8	15.3	14.1	100
Three Capes	4	11	19	14	x	x	x	x	48
Fraser Island	6.7	13.1	16.1	12	14.4	13.5	x	x	90
Overland Track	10.7 + 2 side	8 + 3	17 + 1	8.5 + 5	9.5 + 2.5	9	x	x	65

The map at Figure 6 visually demonstrates the table above, and the distances required to complete each C2C itinerary.

Figure 6. Cape to Cape map indicating a range of itinerary options and distances



4.3.1 Analysis of C2C itineraries and distances

The five suggested walking itineraries for the C2C demonstrate that a complete end to end on track accommodated / camping experience is not possible without walking more than 25 – 30 km in one day. To provide an experience consistent with walker preferences (avg. 15 km per day), requires use of both on track and off track accommodation. In its present form, the C2C cannot provide a complete self-catering wilderness / camping experience for walkers aspiring to achieve the end to end.

Itinerary #3 of the Great Ocean Walk is the only one comparable to the C2C, covering over 100 km and offering 7 nights on track accommodation. In similarity to the C2C, the Great Ocean Walk also provides opportunities for walkers to step off track for local experiences, restocking of supplies and utilisation of off track accommodation if camping isn't desired. The Great Ocean Walk however has much less per day distance required, with 15.3 km the maximum walking requirement in one day.

4.4 Seasonality and other complementary regional experiences

4.4.1 Seasonality

Existing commercial tour operators generally do not offer departures for the C2C during winter (July-August). This is due largely in part to the likelihood of flooding and inaccessibility on the track, particularly around the Margaret River and Wilyabrup River Crossings. Traditionally, winter is a quieter period for the region, however a range of activities is offered with visitors encouraged not to be fearful of the cooler weather. Special winter activities and attractions offered in the region that can be used to encourage walkers along sections of the trail include migrating whales (May – Sept), winter harvests and farmers markets, everything is green and lush, rivers and waterfalls are flowing, no heat or bothering flies, truffle foraging and the Truffle Kerfuffle Festival (June), South West Mud Festival (July) and a range of music, movies and performances in the evening by the comfort of a warm fire. With track upgrades to enable all weather access, walkers could enjoy the 'track for all seasons', while also perhaps opting for a range of off track accommodation and shuttle services if camping on the track is a concern.

4.4.2 Complementary activities and experiences

There is a huge range of activities, attractions, products and experiences generally for visitors to the region. Featuring both inland forests and coastal landscapes, there is a range of outdoor and nature based activities including adventure sports such as scuba diving, horse riding and rock climbing. Caves, heritage lighthouses, Aboriginal cultural experiences, wildlife and wildflowers can either be enjoyed on or off track. Margaret River is synonymous for local food, wine and breweries in the region with high quality, unique events, farmgate and markets all on offer. Events are offered across the year capitalising on the seasons, harvests and changes in the natural environment. These experiences can be packaged and presented to the various walking markets, catering for a range of interests and demographics.

In addition to the C2C, there are several new trail experiences that could readily be further developed and promoted, with potential for the region to become a trails destination. This includes the Wadandi Trail and the recently investigated Wilyabrup Gourmet Trail as well as a northern extension to Meelup Trail (at the northern end of the Cape to Cape) as a standalone trail.

A network of trails can encourage visitors to stay longer in the region, undertake different trail experiences (e.g. walk the C2C, cycle Wadandi), or return time and time again to undertake a different trail, experience a different season or try a new complementary activity or event.

Substantial value-add opportunities exist for walkers of the C2C. It is about collating these experiences and packaging / promoting them as a range of C2C experiences to meet the needs of the target markets.

4.5 Accommodation availability

Section 2 and Appendix B describe accommodation in the region whilst Figures 6 and 7 show the relationship between the Cape to Cape and accommodation.

In summary:

The majority of walkers on the Cape to Cape use roofed accommodation off track and transport to trailheads either as part of a commercially guided walk or using a shuttle service. There is accommodation within a reasonable drive distance (30 minutes) of all trailheads.

There is a diverse range of accommodation available to the market including hotels, motels, guesthouses and private properties in the sharing economy (Airbnb etc).

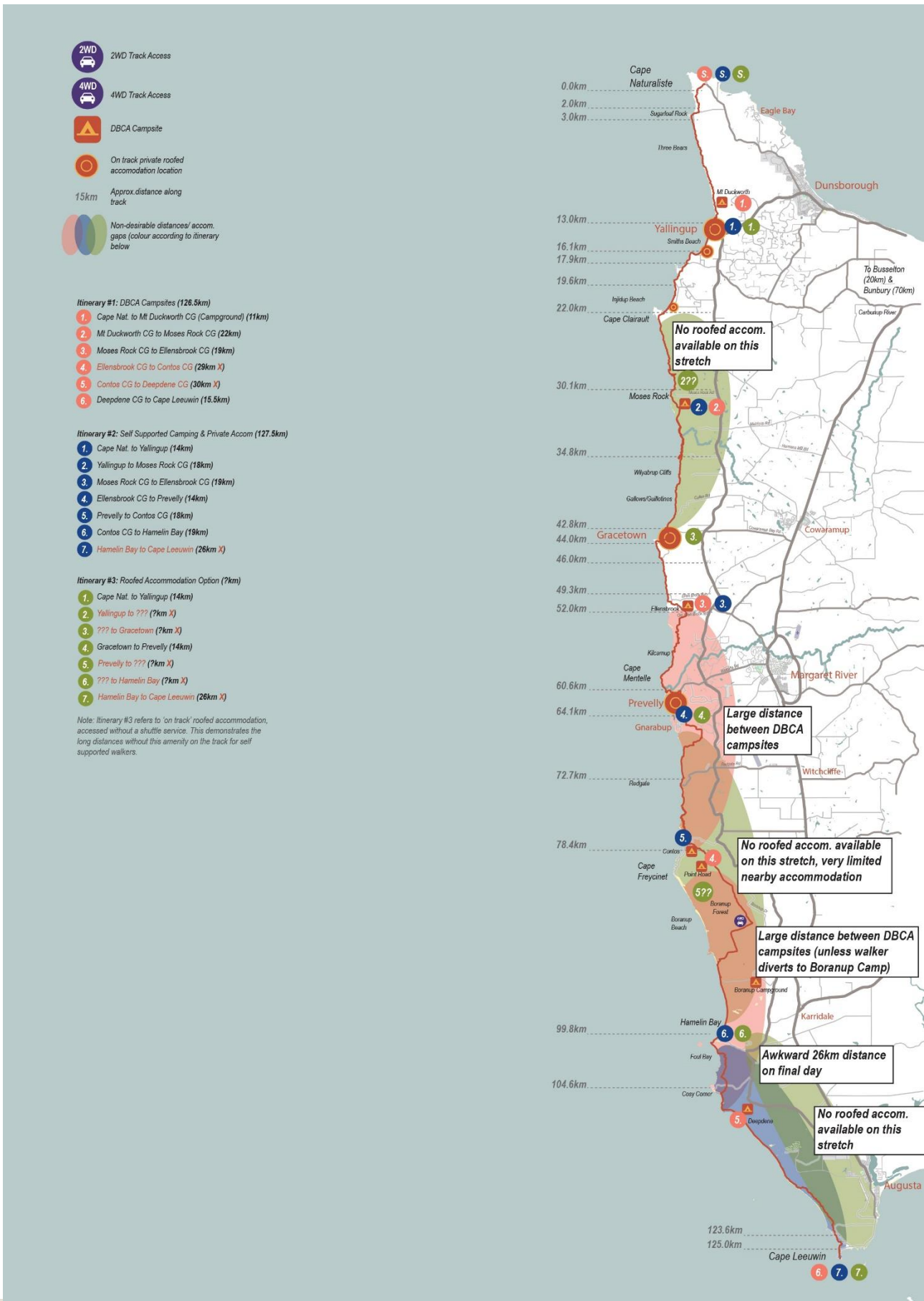
There is understood to be a gap in high end accommodation. However, there are three properties in the pipeline (Margaret River, Smiths Beach and Gnarabup Beach) that will contribute to meeting this need which in turn may increase overall visitation to the region. There is also an expectation that the introduction of direct flights from Melbourne to Busselton is likely to contribute to attracting new accommodation brands into the region.

Existing accommodation in the region has traditionally been at around 50-55% average annual occupancy but at capacity at peak times (Christmas, Easter, events). Additional accommodation could impact the average occupancy rate, depending on the size of the proposed development and its ability to drive new demand to the region.

Camping options provided by DBCA on the Cape to Cape are not appropriately spaced to create a seamless experience for the walker, and a number of sites overlap with car-based camping which potentially negatively impacts the walker experience.

Figure 7 shows the gaps in accommodation against three types of walks – a) camping using DBCA sites b) camping using DBCA plus other campsites (eg. commercial) and c) roofed accommodation near the track. It also shows the gaps in accommodation.

Figure 7. Accommodation Gaps



4.6 Land suitability and planning considerations

Aside from where passing through townships, the vast majority of the Cape to Cape track runs through the Leeuwin – Naturalise National Park, mainly in a Class A Nature Reserve vested to the Conservation Commission of Western Australia (Figure 8).

The nature and principles of eco-accommodation is to minimise the impact on the environment, this includes visual impacts, this type of accommodation would therefore be extremely well suited in a visually sensitive area. Locations for building eco accommodation along / directly adjacent to the track will almost inevitably fall into the National Park, and as such need to consider the reserve’s management and linear and fragmented nature. Locations must be carefully selected so as not to compromise natural, heritage and cultural values of the park and the track – in particular the long term viability of populations of conservation significance.

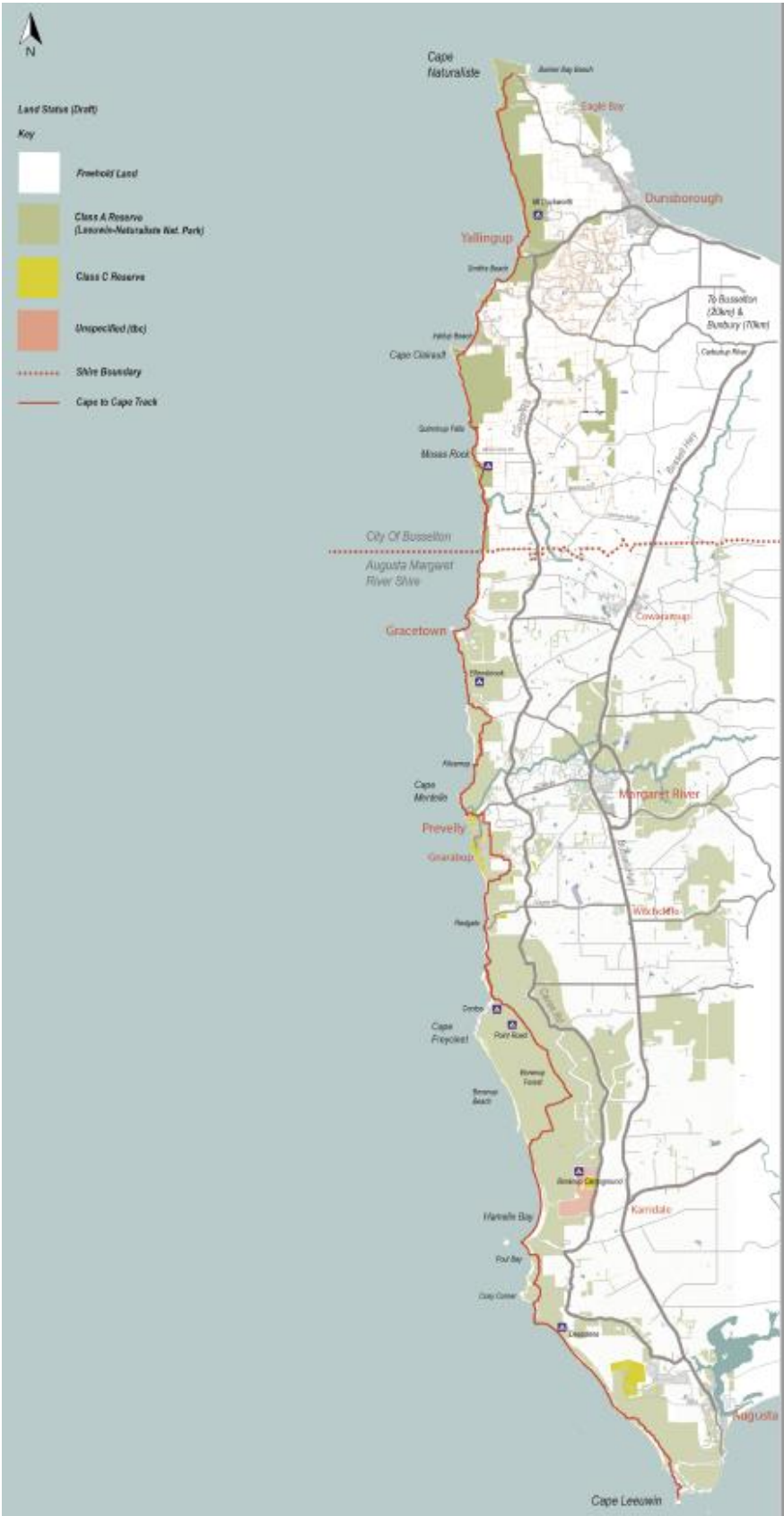
Towards the southern section of the track, where limited accommodation has been noted, the Boranup Forest area has limited exposure to Zone B, defined as - “Areas of low to moderate scenic quality and high public exposure/ sensitivity and areas of high scenic quality or rare landscape character which have low public exposure/sensitivity.” Other locations to the south including Conto Campground also sit within Zone B and C.

Any eco-accommodation proposed on the track and within the Leeuwin – Naturaliste National Park will need to:

- Fill a gap – where a shortage in accommodation has been identified, particularly where there are large distances between on track accommodation, or there is a shortage of off track accommodation options such as in the southern section.
- Meet walker needs / expectations – based on the demographic information presented, align the level of eco-accommodation to the target market. Presently, this may be the self-catering independent walker in which case, eco-campgrounds at the proposed budget or moderate level may be the best option as opposed to a hard roofed facility.
- Be appropriate to the natural, cultural and visual environments – meeting the requirements of the National Park.
- Comply with zoning / planning requirements. Alternatively, through consultation and legislative reviews proposals for amendments to cater for a broader range of facilities and locations may be a further option.
- Consult with relevant agencies and stakeholders such as (but not limited to) – DBCA, DWER, DPLH, DFES, Commonwealth and respective Local Governments, local community, South Aboriginal Corporation, tourism industry and operators.
- Provide multiple benefits for local communities, regional economies, environmental and cultural values and visitor experiences.
- Develop a criteria for eco-accommodation development standards that are consistent and align with the above. Ecotourism Australia presents a substantial criteria for eco-accommodation aspiring towards Eco Certification. Green Star rating is also an accreditation program facilitated through the Green Building Council of Australia, with criteria to meet specifically on design, construct, sustainable use, resourcing and longevity.

A summary of relevant planning documents and areas of natural, cultural and visual significance can be viewed in Appendix G.

Figure 8. Land tenure and zoning



4.7 Comparing great and iconic walking experiences

The below walks provide an opportunity to compare the multi-day walk experience with other ‘great’ and iconic walking opportunities in Australia and overseas. This table measures against the characteristics of great trail experiences, demonstrating where gaps and opportunities may lie for the C2C.

Table 7. Comparative analysis of ‘Great’ and iconic walking experiences

Trail	Location	Route/Track	Experience	Accommodation	Services	Interpretation
Great Ocean Walk*	<p>Along the coastline between Apollo Bay and the Twelve Apostles (near Port Campbell) in south west Victoria.</p> <p>Traverses Great Otway National Park.</p> <p>Three hour drive east of Melbourne.</p>	<p>100 km trail able to be walked as an 8 day walk or as shorter multi-day walks or day walks.</p> <p>Mostly easy to moderate grade with some harder sections.</p> <p>Walked in an east-west direction.</p> <p>Mix of purpose-built track, rock platforms, sandy beaches and some shared vehicle trails.</p>	<p>Independent or guided walking.</p> <p>Iconic Southern Ocean coastline with tall forest, scenic cliff-top vistas, deserted beaches and rock platforms.</p> <p>Parallels the Great Ocean Road from which it is accessible at several nodes.</p> <p>Low to moderate level of interaction with other visitors at access nodes. Some higher volume interaction at major visitor nodes (such as The Twelve Apostles) at peak visitor periods.</p>	<p>Seven bookable, limited capacity, Parks Victoria on-trail campsites, 4 of which can accommodate small parties of up to 18 walkers.</p> <p>Numerous options with off-trail accommodation partners.</p>	<p>Comprehensive online walk information and booking facility. Links to partners.</p> <p>Numerous options for transport shuttles, guided walks and self-guided walks of various lengths and difficulty aimed at a range of markets. Some showcase local natural and cultural features, local food and produce. Equipment hire services.</p>	<p>Free downloadable audio apps in English, German, Japanese and Korean.</p> <p>Onsite interpretation at visitor nodes along the walk.</p> <p>Offered by licensed tour operators, some of which feature local guides. A variety of products focus on different aspects – such as natural, historic, Aboriginal, shipwrecks, local food and produce.</p>

Trail	Location	Route/Track	Experience	Accommodation	Services	Interpretation
Three Capes Track*	<p>Tasman Peninsula, Tasmania about a 90 minute drive from Hobart.</p> <p>Commences at the Port Arthur Historic Site and traverses part of the Tasman National Park to Fortescue Bay.</p>	<p>46 km trail.</p> <p>Total walk takes 4 days/3 nights.</p> <p>Easy to moderate grade with some steeper sections on purpose-built, highly engineered track.</p> <p>Plan to add a further track to Cape Raoul.</p> <p>(Other bushwalkers can access the track and an older track and park service campsites from Fortesque Bay, but cannot stay/camp at Three Capes Track huts).</p>	<p>Spectacular sea cliffs wild forest and heath landscapes. Chance to see marine wildlife.</p> <p>Walk starts at Port Arthur with a boat trip to the trailhead.</p> <p>Independent walkers limited to 48 per day, staying one night in each of 3 on-track public cabins located away from visitor nodes. Cost per adult is \$495 and per child/concession \$396.</p> <p>One tour operator is licenced to provide an exclusive trail experience.</p>	<p>3 bookable, purpose-built, self-catering public cabins with beds and shared cooking and dining facilities managed by Host Rangers.</p> <p>Exclusive, fully catered, private on-track lodges operated by single tour operator.</p>	<p>Comprehensive online walk information and booking facility. Links to partners.</p> <p>Shuttle bus service between Fortescue Bay and Port Arthur at the end of the walk.</p> <p>Scheduled bus services from and to Hobart. Also charter bus and taxi services.</p> <p>Equipment hire and food purchasing services.</p> <p>Luggage storage at Port Arthur.</p>	<p>On-track interpretation at 'story-seats'.</p> <p>Complimentary track guidebook provided to walkers. Interpretation and reference books at cabins.</p> <p>Interpretation provided by private operator.</p> <p>Interpretation at Port Arthur Historic Site.</p>
Wilderness Coast Walk	<p>Along the coast between Mallacoota and Sydenham Inlet in Croajingalong National Park in east Gippsland, Victoria.</p> <p>About 6 hours' drive from Melbourne to Mallacoota.</p>	<p>About 100 km of mainly beach walking with some coastal forest and heathland areas. No track makers in some areas.</p> <p>May be walked in its entirety or as shorter day or overnight walks.</p>	<p>Remote wilderness hiking along an isolated coastline and through pristine environments rich in coastal wildlife for fully-equipped, self-sufficient walkers.</p> <p>Permits required.</p> <p>Maximum group size of 8 people.</p> <p>Accessible from several locations.</p>	<p>Designated wilderness campsites which must be booked in advance. Limited to a 2 night stay at each campsite.</p> <p>General campsites near access points.</p> <p>Point Hicks Lighthouse Keepers' Cottages bookable through Parks Victoria.</p> <p>Holiday accommodation at beginning and end of walk at Mallacoota and Bemm River.</p>	<p>Basic online information on route, logistics and safety. Online campsite booking.</p> <p>Various guided tours cover parts of the route.</p>	<p>No interpretation in wilderness parts of the journey – up to walkers to obtain information.</p> <p>Information on cultural and heritage values available online.</p> <p>Interpretation offered by tour operators.</p>

Trail	Location	Route/Track	Experience	Accommodation	Services	Interpretation
Cape to Cape Track	<p>Between Cape Naturaliste Lighthouse and Cape Leeuwin Lighthouse in the far south-west of Western Australia.</p> <p>Passes through several small coastal towns and close to the visitor destination and wine growing area of Margaret River.</p> <p>About 3 hours' drive south of Perth.</p>	<p>About 123 km taking between 5 and 8 days to walk.</p> <p>May be walked in short day or multi-day sections.</p> <p>Variable route conditions including beaches and inland areas mainly of an easy to moderate grade.</p> <p>Numerous access points.</p>	<p>Extensive beaches, spectacular coastal cliffs, diverse vegetation, wildflowers and wildlife, limestone caves.</p> <p>Experience of small coastal towns and local history and culture.</p> <p>Variable levels of interaction with other visitors at visitor nodes and depending on the season.</p>	<p>Several basic, bookable (low fee) on-track campsites. Maps and guidebook available as paper copies.</p> <p>Range of accommodation at nearby towns.</p>	<p>Comprehensive online information and links to partners.</p> <p>Range of guided and self-guided tours along parts of the route and nearby areas.</p> <p>Luggage and walker transport services.</p> <p>No public transport available to track access points.</p>	<p>Track guidebook and plant identification guide can be ordered from website.</p> <p>Interpretation offered by tour operators.</p>
Light to Light Walk	<p>Walk along the coastline of Ben Boyd National Park near Eden on the far south coast of NSW.</p> <p>About 7 hours' drive south of Sydney.</p>	<p>30 km, 2 to 3 day walk.</p> <p>Well-marked route, generally easy, between Boyd's Tower (at Edrom) and Green Cape Lighthouse.</p>	<p>Coastal scenery – sea cliffs, red rocks, forest, tea tree, heath and banksia woodland environments, marine wildlife. Beach experiences.</p> <p>History of coastal settlement, ship wrecks and whaling at and near Green Cape Lighthouse (the end point of the walk).</p> <p>Interaction with other visitors likely at campground (which are accessible by vehicles and popular) and near Green Cape Lighthouse.</p>	<p>Online information on route, logistics, safety and campground booking.</p> <p>Two bookable (low fee) on-track campground at Saltwater Creek and Bittangabee Bay.</p> <p>Green Cape Lighthouse Keepers' Cottages bookable through the park service.</p> <p>Range of off-track accommodation at Eden, Twofold Bay and the vicinity.</p>	<p>Several guided walking tours utilising campgrounds or off-track accommodation. Some offer linked kayaking experiences.</p> <p>Walker and luggage transport services.</p>	<p>Free downloadable phone app on the walk.</p> <p>Some online information on natural and cultural features.</p> <p>On-site interpretation at Boyd's Tower and Green Cape Lighthouse.</p> <p>Interpretation offered by tour operators.</p>

Trail	Location	Route/Track	Experience	Accommodation	Services	Interpretation
Abel Tasman Coast Track (NZ)*	Between Marahau and Wainui Bay traversing Abel Tasman National park in the north-east of new Zealand's South Island. 60 km from the visitor destination of Nelson.	60 km, 3 to 5 day walk. Well-marked track with some steep and rough sections. Easy to intermediate level walking. Independent or guided walking.	One of NZ's Great Walks along beaches and through lush forests. Opportunities for swimming, wildlife watching, kayaking. High visitor numbers and high volume visitor nodes can detract for the experience.	Comprehensive website (Great Walk website) and online booking. Numerous bookable (small fee) on-track campsites and 4 huts operated by the Department of Conservation. Numerous nearby private accommodation partners, including houseboat accommodation.	Numerous guided and serviced tour options for different markets, including a walk/kayak product. Water taxi services offer walker and luggage transfers to accommodation and between different walk sections.	Free downloadable track guide and app. Online information on natural and cultural features. Interpretation offered by tour operators.
Proposed Great Lakes Walk and Aquatic Trail	Between Pacific Palms, Seal Rocks and Tea Gardens, with sections through Myall Lakes National park, in the mid north coast of NSW. Pacific Palms is about 3.5 hours' drive north of Sydney.	Total 5 day-4 night combined walking and kayaking journey - 3-day walk and 2 -day kayaking. Able to be experienced in shorter sections. Proposed well-signed Class 3 walking track. Proposed operators for the kayaking legs to ensure use of the most appropriate reaches of the lakes dependent on the weather and visitor safety considerations. Seal Rocks is the only higher volume node on the route. Careful design is proposed to minimise visitor interaction at Seal Rocks if desired.	Diverse, pristine coastal and wetland landscapes, ecosystems and wildlife - coastal cliffs, beaches, lakes and lake access to secluded beaches. Potential Aboriginal experiences. Historic heritage and contemporary coastal village life and culture. Local food and produce. Combined walk and kayak experience. Remote experience of Myall Lakes on kayaks and houseboat.	Proposed availability of a range of accommodation options near the trail, including in trail-side towns and villages, in historic buildings and in secluded areas. Proposed houseboat accommodation for the kayaking sections. Potential for exclusive, fully serviced, private accommodation.	Provision of comprehensive online information is proposed. Opportunities for a range of services – guided and self-guided tours, walker and luggage transport, exclusive fully serviced products.	Proposed for an Interpretation Strategy to be developed to guide storytelling featuring the area's natural, Aboriginal and historic values. Potential methods include a downloadable app, on-track interpretation and training of commercial guides in interpretation related to the Trail.

4.7.1 Analysis of Great and Iconic Walks – Gaps and Opportunities

A brief review of the great and iconic walks presented demonstrates both commonalities and contrasts between the walks. Specifically, for consideration of the C2C:

- **Distance** – the end to end walk is exceptionally long by great walk standards. There is an opportunity to promote a range of shorter itineraries and packages that fit within the 3-4 days. This can also encourage visitors to return to complete ‘the next leg’ at a later stage, as many walkers do along the Heysen Trail and Bibbulman Track.
- **Track quality** – some of the iconic walks are purpose-built engineered tracks, delivering an easy to moderate experience. It has been noted that some sections of the C2C follow 4WD tracks which can potentially detract from the experience and raises concerns of walker safety. In addition, a well designed and engineered track can result in less environmental impacts, all weather access and erosion control.
- **Equipment hire, luggage storage and food purchasing / drop services** – some of the walks offer these services which could be future business opportunities for the C2C. These would be attractive services for interstate and international visitors who may not necessarily have camping or hiking equipment and are carrying excessive luggage not needed along the track. Food purchasing and a drop service would also help walkers safely complete the end to end, and they would not be required to carry 8 days of food in backpacks.
- **Themed guided walks** – as opposed to offering an overarching ‘guided’ experience, specialised day and multi-day themed walks could be new product development. Specialised themes could include bird-watching, whale watching, Aboriginal culture, heritage, nature based, flora, photography, gourmet (sampling local produce available enroute), art walks (where walkers are guided and then may stop at a particular point of interest to paint or capture local scenery) and so on.
- **Promotional materials** – many walks offer free downloadable apps and complementary track booklets, some in a range of languages. Apps are available for the C2C (commercial / fee based) and walkers can purchase track maps and information, they aren’t offered for free.
- **Visitor interpretation** – this is a core offer along majority of the walks. Stakeholder feedback noted the need for new signage and visitor interpretation along the C2C, an important experience and walker safety consideration for the future.
- **Fees and bookings** – some tracks either charge walker fees or require a permit to access the trail. This obviously assists with monitoring user numbers, track resourcing and funding, managing track capacity and providing a more exclusive experience for walkers.
- **Other packaged walk experiences** – along some of the walks, add on experiences such as boat cruises and kayaking are offered. C2C could include such packaged experiences along the track visiting some of the region’s attractions such as the caves and lighthouses.
- **Accommodation** – generally, walks offer either on track camping (must be booked, fee based) or off track accommodated options provided by government with any in track accommodation the realm of private sector. The Three Capes, Overland, Milford, Abel Tasman and other NZ walks offer a public hut experience on track also (managed by national parks), mainly due to the cooler and inclement weather. The Great Ocean Walk and proposed Great Lakes Trail have been designed so that walkers seeking roofed accommodation can do so off track, as a means of supporting local businesses and communities.

4.8 Overall summary of the assessment of the C2C

- Much of the track is in very poor condition and requires significant investment – this should include visitor facilities (including signage) and infrastructure.
- Entry fees do not apply to Leeuwin Naturaliste National Park predominantly due to the multiple entry points and difficulty of collection, DBCA does charge park use fees elsewhere.
- Need to consider Cape to Cape accommodation in the context of all trail experiences for the region (including Wadandi, Meelup, Wilyabrup).
- Need to have a holistic approach and strategy for trails, their development, governance, funding and maintenance.
- Friends of C2C play a crucial role in promotion, advocacy, volunteer work and lobbying for the C2C. The organization however does not have the ongoing capacity or resources to adequately manage all aspects of the Track. Their role and opportunities for renewed MOUs and partnerships should be considered in the future.

FEE models:

Fee based – Walkers register and pay a fee to access the track. Fees are generally collected by the management agency and used to reinvest in track maintenance and upgrades. Collection of fees also aids in monitoring and controlling visitor use. The Three Capes Track in Tasmania charges a \$495 walker fee for 4 day / 3 night walk. Fee includes hut accommodation with shared facilities, shuttle / boat to and from the trail heads and entrance into the Port Arthur Historic Site. Track Managers Tasmania Parks and Wildlife Service collect the fees and also have a lease agreement with an exclusive operator providing luxury accommodation along the C2C. Since 2015, trail user numbers have grown from 5,000 per annum to 12,000 in 2018-2019.²³ To estimate the cost of \$495 per person by 12,000 assumes a return of \$5.94M per annum (although there are costs associated with this for services such as boat, hut maintenance etc).

Donation – The Track is managed by a not-for-profit entity, largely comprising of volunteers who maintain the track. Walkers must register to use the track, however at the time of online registration, they are encouraged to make a donation to help with the upkeep of the track. Example – Te Araroa The Long Path, New Zealand managed by the Te Araroa Trust.

No fee – track creates broader regional economic benefits, attracting additional visitors and encouraging them to stay longer and spend more in the region. The Barwon South West Adventure trail network charges no fee, with the trail network instead expected to deliver significant economic benefits to the Victorian community. With a 6 year investment of \$40 million, the trail network net upgrade is expected to deliver \$74.7 million in benefits over 10 years.²⁴

Comprehensive case studies outlining Lessons for C2C can be viewed in Appendix F.

²³ Visitor numbers to selected parks and reserves, Tasmanian Parks and Wildlife 2019

















²⁴ TRC Tourism, Growing Adventure Tourism in Barwon South West Region, A Business Case for Investing in Regional Trails in Barwon South West Region, June 2015

5 Positioning the Cape to Cape for success

5.1 Characteristics of great walks

Based on the review of target markets and other walking experiences, there are several components that contribute towards a great walk experience, whether it be for day use or an extended walking opportunity. The Cape to Cape Track is well positioned to leverage from the current visitation to Leeuwin-Naturaliste National Park and the region. The below diagram provides an overview of what constitutes broadly as a ‘Great Trail’ experience, benchmarking the existing C2C against these elements.

Table 8. Characteristics of a Great Trail experience versus the Cape to Cape Track offer

CHARACTERISTIC OF GREAT TRAIL	C2C CONTEXT
 <p>Clear point of difference for the trail experience that is well communicated through marketing</p>	 <p>The current activity associated with the Cape to Cape is different from other iconic walks and offers a strong point of difference. There is however some disconnect with understanding the offer - no one-stop-shop to access planning information.</p>
 <p>Existing high market profile for the destination in which they are located</p>	 <p>High profile exists for Margaret River but will need stronger messaging about nature in combination with food and wine.</p>
 <p>Complementary nature-based attractions, products and infrastructure in the region</p>	 <p>Broad range on offer</p>
 <p>Ability to cater to both independent and guided walkers / riders</p>	 <p>Range of experiences delivered for both independent and guided needs although the siting of campsites needs to be improved</p>
 <p>An experience that offers a level of exclusivity and avoids high volume nodes or trails</p>	 <p>Operators are offering packaged experiences that are exclusive, but there are some sites with reduced exclusivity with interaction in high volume nodes.</p>
 <p>A quality, seamless experience with ease of information, booking and accommodation</p>	 <p>Commercial partnerships and services do exist but needs improvement</p>
 <p>Walk / cycle distances that is geared towards consumer preferences</p>	 <p>Diversity of experiences / accommodation combined with services enables consumers selection of distance and difficulty. Camping sites are not appropriately spaced. Improvement is needed with promotion of suggested itineraries.</p>
 <p>The scenery and range of environments along trail, plus the trail infrastructure</p>	 <p>Exceptional landscape experience but extensive improvements required to track infrastructure</p>

External to the actual track experience are the underpinning elements:

- Commitment to state or local government priority projects, investment and resourcing surrounding the trail experience
- Availability of both public and private accommodation easily accessible from the track
- Visitor information, cultural, historical and natural interpretation, way-finding and orientation
- Visitor management (limiting over-crowding, detrimental impact on area values, visitor safety)
- Opportunities for public and private investment
- Partnerships with local communities, conservation and special interest groups, local businesses and traditional owners.

What are the benefits?

In return, great trail and walking experiences can support a raft of benefits including:

- Advocacy and connectivity with natural and cultural environments, supporting conservation and protection efforts
- Social and physical health and well being
- Establishment of new businesses and employment within nature based, visitor servicing or adventure tourism experiences
- Flow-on quality lifestyle and economic benefits for local people.

5.2 How other iconic walks are seen

From Table 9, it is clear to see that the Cape to Cape experience is most alike to the offer provided by the Great Ocean Walk. This is a choice of step-on / step-off sections with shuttle services available, independent and fully supported walking options, and opportunities to get off the track to support local communities and businesses. A more in-depth Case Study of the Great Ocean Walk experience is provided in Appendix F.

Similarities include:

- The strength of tourism product in the destination is a significant value add to the walking experience.
- The Cape to Cape could hold a stronger market share than other walks given the integrated tourism product opportunities around nature, food and wine.
- Tour operators, transport providers and accommodation sector interviewed for this study indicated that majority of walkers are looking for mix of experiences.

Table 9. An overview of Great walk experience and accommodation type

Track	Experience	Accommodation offered
Overland Track	End to end – 5 nights	Fully supported – commercial cabins on track
		Independent – camping or huts on track
Three Capes	Circuit – 3 nights	Fully supported – commercial cabins / lodges on track
		Independent – huts on track
Bay of Fires	End to end – 3 nights	Fully supported commercial cabins / lodge on track
Maria Island	Circuit – 3 nights	Fully supported – commercial tents / heritage accommodation on track
		Independent – camping on track
Great Ocean Walk	End to end + step on / step off (3 nights recommended)	Independent and supported - Step on / step off using a range of private commercial accommodation and shuttle services off track
		Fully supported – lodge based walk – off track
		Independent – camping on track
Arkaba Walk	End to end – 3 nights	Fully supported – swag camps and homestead accommodation on track
Scenic Rim Trail	End to end – 1 night	Fully supported – glamping / cabins on track
Wilsons Prom	Circuit – 3 nights	Independent – camping on track
Cooloolo Great Walk	End to end – 4-6 nights	Fully supported – cabins (in development) on track
		Independent – camping on track

5.3 Positioning

Positioning is about taking ownership of one idea or emotional territory in the marketplace

The positioning provides a framework to deliver a message and products to market, so that the offering of the region is easily understood and “consumed by the visitor”. It is how a product stands out for the consumer for its merits and values. It is about **not** being all things to all people. Clarity of positioning for the Cape to Cape experience is critical to generating awareness and attraction to visit the C2C over other multi day walks.

It is clear from conversations with stakeholders that the Cape to Cape is currently undertaken in two ways – firstly as a supported walk that uses destination accommodation and integrates other experiences such as food and wine and local attractions in the walking visit. Secondly, as an independent walk on the track of various durations with camping at both on track and near track facilities. For the latter group, whilst they may do other destination activities before or after the walk, it is not important during the walk.

The strength of the Margaret River brand is a significant opportunity off which to leverage Cape to Cape experiences. The C2C has the potential to be positioned for the exceptional experience of supported walking from off track accommodation that integrates with the wine and food offerings and other exceptional experience themes within the destination, whilst continuing to provide for independent walkers on track.

In comparing other multi day walks across Australia, the Great Ocean Walk is the most similar in terms of positioning – a multi-day experience where visitors either walk independently using on track camping, or undertake supported walks using off track local destination accommodation.

Incorporating high end accommodation on track will potentially alter the C2C experience. Walkers seeking this type of accommodation are likely to want an exclusive guided experience, not to be walking alongside independent or other tour group walkers. Commercial operators catering for high value travellers have also indicated that this market prefer to have accommodation at ‘one base’ and are keen to connect with a range of off track local experiences. As with the Great Ocean Walk and proposed Great Lakes Trail – the walks are a means of connecting visitors with local businesses and communities, while providing them with an additional reason to stay longer in the region. The positioning of the C2C needs to capitalise on the destination’s experiences holistically. Walkers aren’t just undertaking the C2C purely for the walk and accommodation – they are coming for the complete value the region offers.

6 Viability of new eco-accommodation

6.1 The accommodation options

The purpose of this study is to analyse the demand, physical need and suitability for the development of any new eco-accommodation along the C2C. This section will assess the viability of proposed new eco-accommodation across a range of options:

- Budget style accommodation (e.g. self-catered, tents/huts as per Bibbulmun track)
- Moderate level accommodation (e.g. basic tent, limited catering, shared ablutions)
- Up-market, exclusive accommodation (e.g. cabin/luxury tent, fully catered, en-suite ablutions).

The brief described these options as follows

Table 10. Accommodation options

Accommodation Type	Description
Budget Style Accommodation	Self-catered, hut/ tent area as per Bibbulmun track. (Govt. operator – Parks & Wildlife Service (PWS)) No on-site staff. Rangers visit to undertake cleaning and maintenance.
Moderate Level Accommodation	Basic tent, limited catering, shared ablutions. (Govt. operator- Parks & Wildlife Service (PWS)) Site Managers on each site (7 sites)
Up Market Accommodation	Cabin/luxury tent, fully catered, en-suite ablutions) (Private operator) Site managers on each site (total 3 sites)

6.2 Market insights

Supported Walkers

- The supported walker market has a preference for a 3-4 night walk and 12-15 km / day; they generally prefer luggage to be transported or carry only small pack (10-12kg max).
- Current preference for supported walkers on Cape to Cape is 3-4 nights **from one base** and **transport to trailheads**. Some also do 7 night itineraries but also **from one base**.
- This is consistent with the higher end market (High Value Traveller) who also has a preference for 3-4 nights.
- If accommodation is to be established on track, it needs to be spaced at average 12-15 km / day to suit majority of market.
- Gaps in the market are lower end on track (e.g. camping / cabins) and high-end (although properties are in the pipeline that will contribute to filling this gap).
- **Independent Walkers** Most people that do end to end on Cape to Cape take 8 days / 7 nights. This is consistent with an average of up to 18km / day.
- The self-sufficient walker is more likely to choose a 7 night itinerary

- Camping options are not appropriately spaced to create a seamless experience for the walker, and a number of sites overlap with car-based camping which potentially negatively impacts the walker experience

Current situation and opportunities

- Existing accommodation in the region (largely mid-range and self-catering) has traditionally been at around 50-55% average annual occupancy but at capacity at peak times (Christmas, Easter, events). Additional accommodation will further impact this low rate of occupancy, unless it is in the low or high end range where a gap currently exists – which in turn may increase overall visitation to the region.
- There is a large amount of share accommodation establishments available.
- Covid-19 will exacerbate lower occupancies given inbound visitors to the Augusta-Margaret River region contributes an annual average of 28% of the inbound market of Western Australia.²⁵
- The Busselton-Margaret River Airport expansion and the new cruise ship facility will allow further increased tourism opportunities by opening the door to other inter-state and international markets.

6.3 Demand and financial analysis

On the basis of the research and market insights presented in the previous sections, the first two categories (budget and moderate) have been evaluated on the basis of a 7 night experience. The up market accommodation has been evaluated on the basis of a 3 night experience (3 sites - consistent with the higher value traveler and typical 'great walk' type products). The market seeking the more up market accommodation is unlikely to do a seven-day walk using different accommodation each night.

Analysis assumptions:

- Walker numbers have been based on current estimates covering day and overnight walks. Total walkers were estimated at 20,000 per year (14,000 day walks and 6000 overnight walks). See Table 3 earlier in report.
- Three growth scenarios were examined for a 10-year period – with staggered annual growth rates in walkers of Scenario 1 – 5%, Scenario 2 – 7.5% and Scenario 3 – 12.5%.
- Strong growth will be predicated on upgrading the track, developing the accommodation and effectively positioning the Cape to Cape within the destination offering.
- It is assumed Government would build and operate the budget and moderate accommodation, with the up market accommodation offered via EOI at a site lease based on 7.5% of gross revenue (with a rent holiday years 1-3).²⁶
- Budget and Moderate level accommodation is for 7 sites. This is on the assumption that this range of accommodation will largely cater for independent walkers undertaking the end to end experience (8 days / 7 nights).

²⁵ Shire of Augusta – Margaret River overnight visitor factsheet – February 2020

²⁶ **The analysis in this section is indicative only and covers potential user numbers and financials. The analysis is based on a number of assumptions which are detailed. As part of a feasibility study a full financial analysis would need to be undertaken for each option.**

- Up market accommodation is for 3 sites. This meets the desired walk length / duration of HVT Great Walks market which is largely supported (4 days / 3 nights).
- Up market accommodation has been modelled separately due to the differing operational models, and because growth in the up-market accommodation is limited by the total capacity of the accommodation.
- Detailed analysis is provided in Appendix H.

Table 11. Accommodation Options – On Trail

Accommodation Type	Description	Rates / Fees	Development
Budget Style Accommodation	Self-catered, hut/ tent area as per Bibbulmun track. (Govt. operator – Parks & Wildlife Service (PWS)) No on-site staff. Rangers visit to undertake cleaning and maintenance.	\$11 per person per night (National Park & State Forest Camping Fees 2019)	7 sites along trail Capacity: 30 persons Cost per site: \$250,000 Cost 7 sites: \$1,750,000
Moderate Level Accommodation	Basic tent, limited catering, shared ablutions. (Govt. operator- Parks & Wildlife Service (PWS)) Site Managers on each site (7 sites)	\$25 per person per night (comparable sites on other walks)	7 sites along trail Capacity: 30 persons Cost per site: \$750,000 Cost 7 sites: \$5,250,000
Up Market Accommodation	Cabin/luxury tent, fully catered, en-suite ablutions) (Private operator) Site manager at each site (total 3 sites) provision of meals, cleaning, laundering etc.	\$250 per person per night (Indicative rate for private facility) (Does not include catering & meals – a fully catered night might be \$450-\$500)	3 sites along trail Capacity: 12 persons 7 cabins (2-bedroom cabins) – 6 for guests & 1 for staff. Cabin cost \$250,000 Cost per site (7 cabins) = \$2,000,000 Cost 3 sites: \$5,250,000

Table 12. Cape to Cape Walk – User Assumptions

Cape to Cape Walk	Estimates Walkers		Accommodation Use	
	Year 1	On Trail	Off Trail	
Total Walkers	20,000			
Day Walkers	14,000			
Overnight Walkers				
2-day walks = 1 night accom	1000	50%	50%	
4-day walks = 3 night accom	3500	50%	50%	
8-day walks = 7 nights accom	1500	67%	33%	
Total Overnight Walkers	6,000	3,255 (on trail)	2,745 (off trail)	

Growth Scenarios	
Scenario 1	5.0% annual growth Y2-10
Scenario 2	7.5% annual growth Y2-10
Scenario 3	12.5% annual growth Y2-10

Scenario 1 – Annual Growth 5.0 % per Year

This section provides a summary of findings at 5.0% growth per annum over a 10 year period. Full analysis can be viewed at Appendix H.

Walker numbers and nights

- Day walkers grow from 14,000 (year 1) to 21,719 by year 10
- Overnight walkers grow from 6,000 (year 1) to 9,308 by year 10.

For those using on trail accommodation:

- Basic and moderate (covers 1, 3 and 7 night walkers) grows from 12,785 nights (year 1) to 19,834 nights (year 10)

Financial modelling

Based on the above estimates, at **5% per year growth**, forecast revenue generated from accommodation less operational costs is presented below:

Table 13. Financial modelling - at 5% per year growth

Accommodation Type	Revenue	Annual operating costs	Net operating result
Budget Accommodation (7 sites) \$11 per person / night	Year 1: \$140,635 Year 10: \$218,171	\$52,500 per year (across 7 sites) Rangers undertake cleaning and maintenance	Year 1: \$88,135 Year 10: \$165,671
Moderate level Accommodation (7 sites) \$25 per person / night	Year 1: \$319,625 Year 10: \$495,843	Site Manager - \$70,000 (incl super) per year x 7 sites = \$490,000 Annual maintenance all sites costs - \$157,500 / year	Year 1: -\$327,875 Year 10: -\$151,657

6.3.1 Scenario 2 – Annual Growth 7.5 % per Year

This section provides a summary of findings at 7.5% growth per annum over a 10 year period. Full analysis can be viewed at Appendix H.

Walker numbers and nights

- Day walkers grow from 14,000 (year 1) to 26,841 by year 10
- Overnight walkers grow from 6,000 (year 1) to 11,347 by year 10.

For those using on trail accommodation:

- Basic and moderate (covers 1, 3 and 7 night walkers) grows from 12,785 nights (year 1) to 24,278 nights (year 10)

Financial modelling

Based on the above estimates, at **7.5% per year growth**, forecast revenue generated from accommodation less operational costs is presented below:

Table 14. Financial modelling - at **7.5% per year growth**

Accommodation Type	Revenue	Annual operating costs	Net operating result
Budget Accommodation (7 sites) \$11 per person / night	Year 1: \$140,635 Year 10: \$267,056	\$52,500 per year (across 7 sites) Rangers undertake cleaning and maintenance	Year 1: \$88,135 Year 10: \$214,556
Moderate level Accommodation (7 sites) \$25 per person / night	Year 1: \$319,625 Year 10: \$606,945	Site Manager - \$70,000 (incl super) per year x 7 sites = \$490,000 Annual maintenance all sites costs - \$157,500 / year	Year 1: -\$327,875 Year 10: -\$40,555

6.3.2 Scenario 3 – Annual Growth 12.5 % per Year

This section provides a summary of findings at 12.5% per annum over a 10 year period. Full analysis can be viewed at Appendix H.

Walker numbers and nights

- Day walkers grow from 14,000 (year 1) 28,090 by year 10
- Overnight walkers grow from 6,000 (year 1) to 17,319 by year 10.

For those using on trail accommodation:

- Basic and moderate (covers 1, 3 and 7 night walkers) grows from 12,785 nights (year 1) to 36,904 nights (year 10)

Financial modelling

Based on the above estimates, at 12.5% per year growth, forecast revenue generated from accommodation is presented below:

Table 15. Financial modelling - at **12.5% per year growth**

Accommodation Type	Revenue	Annual operating costs	Net operating result
Budget Accommodation (7 sites) \$11 per person / night	Year 1: \$140,635 Year 10: \$405,944	\$52,500 per year (across 7 sites) Rangers undertake cleaning and maintenance	Year 1: \$88,135 Year 10: \$353,444
Moderate level Accommodation (7 sites) \$25 per person / night	Year 1: \$319,625 Year 10: \$922,600	Site Manager - \$70,000 (incl super) per year x 7 sites = \$490,000 Annual maintenance all sites costs - \$157,500 / year	Year 1: -\$327,875 Year 10: \$275,100

It should be noted that for the moderate level accommodation, if there were no roofed accommodation or catering requirements, an on-site manager would not be required. In this situation, as per the low / basic accommodation, DBCA staff would service the 'moderate' accommodation facilities as with other national park campgrounds.

An analysis of the impact of removing the need for a site manager was undertaken, returning a remarkable net positive result of \$162,125 (year 1) to \$338,343 (5%), \$449,445 (7.5%) or \$765,100 (12.5%) by year 10 (full analysis at Appendix H).

6.3.3 Upmarket Accommodation - Return on Investment

The following analysis is for the upmarket trail accommodation. This has been modelled separately to the budget and moderate level accommodation because growth in demand for the up market accommodation will be limited by the capacity in terms of bed numbers, and also because it is assumed that investment in the upmarket accommodation would come from the private sector.

It has been assumed that if there is up market accommodation it will be consistent with the capacity of other 'great walks' with groups of up to 12 people accommodated (ie 6 client cabins and one staff) plus group facilities / amenities

The following are the assumptions used in the cash flow modelling and estimation of the ROI for the upmarket trail accommodation. It is assumed that with seasonal conditions, the accommodation operates over 8-month period (240 days). This delivers a capacity of 2880 visitor nights for each facility. For 3 sites the capacity over the 8-month period would be 8640 visitor nights. Three occupancy rates were examined (100% , 75% and 50%). The tariff was \$250 per person / night (accommodation only- the actual cost including support/catering etc would likely be \$450-\$500).

Table 16. Upmarket accommodation

Upmarket Accommodation	Modelling Assumptions <Accommodation Site>
Capacity (persons)	12
Months	8
Days per month	30
Total Days	240
Total Visitor Nights (capacity)	2880
Occupancy Rates	Visitor Nights – Occupied
100%	2880
75%	2160
50%	1440
Tariff	\$250 per night
Cost Assumptions	
Capital cost per site	\$2,000,000
Site lease	7.5% gross revenue – with rent holiday years 1-3
Maintenance	3% of capital cost
Staff – Site Manager	Salary \$75,000 per year
Other Costs	\$50,000 per year assumed

The analysis examines the return on investment for one of the sites. Three sites on the trail are proposed and the analysis would apply to each of these accommodation facilities. Detail of the analysis is provided in Appendix H.

In summary based on the assumptions for the market the modelling shows:

- The Return on Investment (ROI) is positive for two of the cases (occupancy rates 100%, 75%) and negative for one case (Occupancy rate 50%), with a tariff of \$250 per person / night.
- ROI 100% occupancy = +70.3%; ROI 75% occupancy = +30.6%; ROI 50% occupancy = **-10.9%**.

At the 100% and 75% occupancy rates, there would be potential to attract a private investor/operator.

For a comparison, two other cases were examined with lower tariff rates: 100% occupancy and a tariff of \$150 per person / night and 75% occupancy and a tariff of \$150 per person / night. The 100% occupancy gives a positive ROI of +6.0%. This would not be sufficient to attract an investor/operator due to risk factors associated with specialist on trail accommodation. The 75% occupancy gives a negative ROI of **-19.4%**.

6.4 Summary

- From this analysis, it can be viewed that at 5%, 7.5% and 12.5% growth rates, only the budget accommodation produces positive Net Operating Results.
- Moderate level accommodation is cost prohibitive with the inclusion of a site manager. Considerations of other models may make this a viable option, such as no on-site manager with a reduction of facilities provided (e.g. all self-catering, no provision of tents) making the site easier to manage by rangers or volunteer camp hosts. For comparison, a brief analysis has been done on this scenario, in which surpluses are realised at each of the growth rates (analysis can be viewed within Appendix H).
- Upmarket accommodation provides an adequate return on investment at 75% and 100% occupancy rate. However, the existing largely mid-range off track accommodation in the region has an average occupancy of around 55%.
- Operators in the region already providing supported experiences (including GWOA product) advised that clients prefer having 'one base' for accommodation as opposed to a different venue each night.
- Three new upmarket accommodation venues are planned to come online in the region over the next 1-3 years.

6.5 Potential impacts of new on track eco-accommodation

Natural, cultural and heritage values – the C2C incorporates a range of natural, cultural and heritage values that must all be carefully considered when planning track changes or accommodation sites (including camping). Stakeholder consultation revealed issues with track erosion and track sites where flooding occurs. Any future planning work towards identifying new accommodation sites will need to include environmental and cultural impact assessments, review and if appropriate amend restrictions in current planning documentation and consult closely with relevant Aboriginal people connected to the region. The values are a core component of the track's attraction and will need to be protected and managed appropriately.

Existing users of the track – approximately 20,000 visitors use some part of the C2C each year. Of this use, majority are short day visits. Around 1,000 walkers undertake the complete end to end annually, and tour operators deliver guided experiences to approximately 1,000 visitors annually. Stakeholder commentary noted that the track has capacity for increased use, and visitors enjoyed the sense of remoteness (minimal visitor interactions) the track experience provided. Obtaining more reliable track

use data including assessing where visitors stay, inspecting the existing track use and impacts will aid in determining optimum carrying capacity for the track and suitable locations for potential new accommodation that does not impact on the 'remote' experience.

Existing guided services – all existing C2C guided walk experiences use one base in the region for guest accommodation. It was revealed that this is the expectation and preferred option of visitors on guided experiences. Each of the operators has existing relationships with local off track accommodation providers, who provide the standard of accommodation the guests are anticipating. The off track base also enables tour guests to enjoy complementary local experiences in the region such as food and wine or visiting attractions.

Existing accommodation providers, local businesses and the community – the region has a large range of off-track accommodation, particularly the mid-range and self-catering categories. A gap in high level accommodation has been identified, however new high quality accommodation will be coming online in the region over the next 1-3 years. Accommodation providers already experience an average of 55% occupancy, new on track accommodation would only further compete with this. The off track accommodation and shuttle services used by walkers support local businesses, while also enabling the walker to connect with other local products and experiences. Providing an on track option, prevents walkers getting off track to connect with local communities and experiences.

Other comments:

- The walking experience of the Cape to Cape needs to be an exceptional experience if it is to warrant investment in accommodation, and if demand for the experience is to grow. Significant investment will first be required to bring the track to an appropriate standard including re-alignments, erosion control, construction and maintenance as well as amenities, wayfinding signage, information and interpretation.
- There is adequate accommodation available or in the pipeline for fully facilitated walkers as well as supported overnight walkers, but the facilities for independent and group overnight walkers are inadequate and not well spaced along the track. Well designed independent walker facilities could attract growth in this market as well as be suitable for supported overnight walkers.
- Track upgrades and associated infrastructure (signs, lookouts, rest areas) will drive increased visitation, positive word of mouth and generate more opportunities in the region. Development of new and upgraded on-track camping facilities, will provide a better quality C2C experience and create greater opportunities to develop ancillary products to support these walkers.

7 Conclusions and recommendations

7.1 Concluding comments

Positioning the Cape to Cape

The **optimal positioning** and **point of difference that will enable** the Cape to Cape to grow supported walker market share relative to other well-known multi day walks lies in the connection between the walk and other attributes and experiences of the destination. This has been expressed and re-iterated by commercial operators and other stakeholders. This positioning predominantly relies on in region accommodation from which walkers are transported to and from trailheads on a daily basis and the complementary activities, products and attractions that are also significant drawcards for the region. There also continues to be potential for growth in the independent walker market that undertakes longer walks (e.g. 7 night end to end), camps and carries their own luggage, as well as camping with luggage transfers between overnight camps.

Seasonality has been identified as an issue, particularly due to track flooding and inaccessibility during winter. With recommended track improvements to allow for the C2C to be a 'walk for all seasons', is the opportunity to grow visitation during traditionally quieter times. Promotions could include seeing waterfalls flowing (something that cannot be viewed during warmer months), unique plants in flower, a quieter experience with less people around or regional events (e.g. winter harvests) that may provide a value-add activity to the walk experience. This report has also identified a plethora of products, experiences and attractions in the region, enabling visitors to choose a walk experience that suits them. Walk themes incorporating local food and wine, adventure, heritage, Aboriginal culture and nature encounters can all be packaged with or added-on to the walk as a pre or post walk activity, with suggested itineraries aimed at the targeted walker markers.

Walker markets

The four existing walker market using the Cape to Cape should continue to be provided for. These are:



Day Walkers



Independent overnight walkers and walker groups



Supported Overnight Walkers



Fully Facilitated Walkers

The walking track

The walking experience of the Cape to Cape needs to be an exceptional experience if it is to warrant investment in accommodation, and if demand for the experience is to grow. Significant investment will be required to bring the track to an appropriate standard including re-alignments, erosion control, construction and maintenance as well as amenities, wayfinding signage, information and interpretation.

Given the high profile of the track and high visitation levels including day walkers, a series of innovative visitor infrastructure (such as has been established by DBCA for example at The Gap, Albany and in Kalbarri National Park) at appropriate locations would also enhance the overall experience.



Adequacy of accommodation

There is adequate mid-range off track accommodation in the region to cater for fully facilitated and supported overnight walkers, however presently there is limited up market accommodation available to cater for the HVT. Three new up market facilities are in the pipeline, scheduled to come online within the next 1-3 years. The facilities for independent and group overnight walkers however are inadequate and not well spaced. Well designed independent walker facilities could attract growth in this market as well as be suitable for supported overnight walkers.

Financial returns on investment in accommodation

Budget accommodation

The establishment of budget style camping facilities charged at \$11/night (DBCA fee rate), would see a reasonable return on investment at each of the modelled growth rates.

Moderate accommodation

The establishment of moderate style camping facilities (defined in the brief as provision of basic tents, limited catering, shared ablutions – requiring an onsite camp manager or host) charged at \$25/night, would not see a return on investment at each of the modelled growth rates for several years.

However, for the moderate level accommodation, if there were no tents or catering requirements, an on-site manager would not be required. Under this scenario, still charging at \$25/person/night and with a similar investment into good quality facilities (designated tent platforms, a communal shelter and toilets) on each growth rate a solid return on investment would be delivered and an excellent experience could be provided for independent (and potentially partially supported) walkers..

Upmarket on trail accommodation

This type of accommodation was evaluated on the basis of three nights/sites as the market that would pay for this type of accommodation is unlikely to walk for seven days. It is based on a capacity of 12 guests plus two staff/location based on the experience of other iconic multi day walks where an exclusive experience on track is desirable.

The analysis examines the return on investment for one of the sites and the result would be the same for each of the sites. For a range of occupancy levels from 50-100%, based on an accommodation only tariff of \$250/night (catering and other services could be expected to be an additional

\$200+/night/person).the return on investment is negative for the lowest occupancy, and positive for higher scenarios although these occupancy levels are generally not reached in the region.

7.2 Recommendations

Upmarket accommodation

- On track upmarket accommodation could also dilute what we believe to be the optimal positioning for the Cape to Cape for supported walkers that lies in the connection between the walk and other attributes and experiences of the destination. Staying in upmarket accommodation on track does not enable the same level of interaction with the destination as does off track within the destination, and thus will be less appealing to supported walkers.
- Given the financial analysis of ROI for upmarket accommodation, plus the additional high end properties coming on-line near the track, combined with the downturn in the tourism industry due to COVID-19, we would not recommend offering upmarket accommodation for EOI at this stage. Demand could be re-evaluated in a few years after the track has been upgraded, campsites established, continued promotion and positioning of the experience and the tourism industry has recovered. An option of two sites, one in the north and one in the south at a distance from existing accommodation, could be investigated at this time.

Camping facilities

- Whilst budget camping facilities could be provided, it is recommended that as the track is upgraded, priority should be given to a **consistent quality moderate standard camping facilities** at appropriately distanced locations suited to 7-night walks by independent overnight walkers and walker groups.

Moderate standard camping would see attractive campsites (potentially with tent platforms, shared ablutions plus a cooking and gathering shelter [see example pictures below Grampians Peaks Trail]). Under this scenario there would not be ‘tents’ or similar provided, but walkers would bring their own. Opportunities could also be provided for commercial operators to store equipment and, potentially, have separate sites nearby. Walkers could, if they wished, avail themselves of local services to transport luggage between campsites.



MODERATE LEVEL ON TRACK CAMPING INFRASTRUCTURE GRAMPIANS PEAKS TRAIL

Regional strategy

Positioning of the region for its nature-based assets can also be strengthened through further development and promotion of a suite of trails through the Unbeaten Trails project that can underpin diversity in target markets and add new demand drivers. Although there may not be opportunities to

physically connect these trails, the network can certainly be promoted to encourage longer regional stays and repeat visitation to complete different trails and sections.

A regional Trails Master Plan is required to determine the priorities for development and positioning of the region as a trails destination.

Fees for overnight walkers and commercial operators

- Upon the completion of upgrades to the track and the establishment of good camping facilities, it would be timely to introduce a fee for overnight walkers and commercial operators that can be re invested in the track. This could be collected through the on track camping fees and a per capita fee for clients using either commercial shuttle services to access trailheads or walking with commercial guiding companies. Registration and collection of fees also enables monitoring, measuring of impacts and appropriate management of track. Fees could be packaged similar to the Three Capes Track to support other experiences depending on individual interests (e.g. caves and lighthouse access, shuttle bus, adventure activities and overnight on track accommodation) see appendix J.

Other considerations

- Prior to Master Planning, a comprehensive review of Zoning / planning restrictions will need to be undertaken. The Master Plan will either need to work within these restrictions, or areas where restrictions may be amended will need to be considered.
- Environmental and cultural impact assessments will be required prior to confirmation of any new facilities or accommodation on track.
- Consultation with Aboriginal organisations (did not occur due to COVID-19 travel restrictions)
- Best practice sustainable design principles (as per Ecotourism Australia and Green design principles).
- Updating Park Management Plans and policies to allow for recommendations. The current Leeuwin-Naturaliste National Park Management Plan 2015 does not support development of on track accommodation. A determination needs to be made on whether this may be supported in the future under well managed guidelines and principles. For future research. Is there potential to construct 1 or 2 high end on/near track options, one north/one southern end of track.
- Locations of up market accommodation – with the advice three new up market accommodation facilities will be available in the region in the future, location of further new up market venues could be considered for the longer term. With track improvements, positive word of mouth, packaging and itinerary development, overnight walking along the C2C may grow. This may present an opportunity for additional up market accommodation to be located at either end of the C2C instead of along the Track. Walkers can use this as a hub and know that facilities, services, supplies and access is readily available. Locating up market accommodation in a hub will also reduce planning / zoning concerns and potentially be a more viable option for an investor, as the accommodation venue can welcome other visitors to the region, not just walkers of the C2C.
- A new Great Walk for Western Australia. As noted, other State and Territory Governments are undertaking further work on growing the Great Walks offer and available product. Serious considerations should be given to a future Great Walk in WA that aligns with the WA Trails Blueprint 2017 and the recently released WA Hiking Strategy 2020. Several jurisdictions within WA are now working towards developing their own Regional Trails Master Plans, which provides the ideal opportunity as a springboard for the WA Government to investigate new Great Walks for the State.

8 Appendices



APPENDIX A – TOUR OPERATORS AND TRANSPORT PROVIDERS C2C

TOUR AND TRANSPORT OPERATORS	
Adventurous Women	<ul style="list-style-type: none"> • Group travel for women with tours across Australia • Offers one Cape to Cape experience annually. • Stay in beach house accommodation, The Break with shared facilities. • Max participants 13 <p>www.adventurouswomen.com.au</p>
Cape to Cape Explorers	<ul style="list-style-type: none"> • Offers 6 x 8 day end-to-end guided tours in Autumn (March – May) and 10 x 8 day end to end guided tours during Autumn (Sept-Nov). • Locally based in Margaret River region, provides pick up and drop off service to and from Perth • In addition to end to end tours, offers options for day guided hiking tours and self-guided trail running and 3, 4, 5 and 7 day packaged tours (includes transfers, accommodation and meal options), private and custom tour options also available • A range of accommodation options offered to suit varying budgets and needs (uses the one accommodation venue for the duration of the tour) from private apartment at Margaret’s Beach Resort, shared facilities at Gnarabup Beach House or camping (Spring only) at private ‘Glamping Village’ at Surf Point Resort. <p>www.capetocapetours.com.au</p>
Explorus Adventure Learning	<ul style="list-style-type: none"> • Part of the Outdoor Education Group, Explorer Adventure Learning is tailored for school groups of up to 160 people. • Onsite bush camp and bunkhouse, students participate in a range of activities within the Leeuwin Naturalise National Park including abseiling, canoeing and hiking along parts of the Cape to Cape. https://www.oeg.edu.au/territory/wa/camp-margaret-river/
Inspiration Outdoors	<ul style="list-style-type: none"> • Offers 19 annual departures of 8 day lodge accommodated guided tours throughout the year. Most tours are operated during September & October. • Also offers 3 x 5 day ‘highlights’ tour also lodge accommodated. • Max groups size 13, offers private guided walks for groups of four or more. • Stay in one location each night, the Margaret River Hotel with transport to and from Track segments daily. <p>www.inspirationoutdoors.com.au</p>
Auswalk Walking Holidays	<ul style="list-style-type: none"> • 8 day walking tour. • Stays at same accommodation each night, Prevally Beach house (offering both shared and ensuite facilities). • Offers 13 tours annually during April, May, September and October. • Self-guided option also available. <p>www.auswalk.com.au</p>
MyDriver Margaret River	<ul style="list-style-type: none"> • Offers private vehicle tours, generally to half – full day tours of Margaret River wineries. • Can also pick up / drop-off from Perth and transport to and from segments of Cape to Cape on request. <p>www.mydrivermargaretriver.tours</p>
Shepherdsons Transport	<ul style="list-style-type: none"> • Offers vehicle and driver hire in coaches, for private groups participating in the Cape to Cape. • Can also provide camping equipment and options on request. • Based at Margaret River. <p>www.margaretriverbushire.com</p>

TOUR AND TRANSPORT OPERATORS

Walk into Luxury	<ul style="list-style-type: none"> • Promoted as part of Tourism Australia’s Signature Great Walks series, Walk into Luxury offers a 4 day Cape to Cape Walk (only 41 km of Track). • Stays each night at Injidup Spa Retreat with max groups sizes of 14. • Offers 26 departures annually across the year except July, August, December and January. <p>www.walkintoluxury.com.au</p>
Dunsborough Taxis	<ul style="list-style-type: none"> • Provides vehicle and coach hire and driver for self-guided walkers and private groups, including pick-up and drop-off along segments of the Cape to Cape with advanced bookings. Can also pick-up and drop-off ex-Perth. <p>www.southwestairporttransfers.com.au</p>
Life’s an Adventure	<ul style="list-style-type: none"> • Offers 8 annual departures of 4 day accommodated guided tours, operating Feb, March, April, May, September, October, November. • Stays nightly at the Pullman Bunker Bay Resort. • Max group sizes are 12 with tours <p>www.lifesanadventure.com.au</p>
World Expeditions	<ul style="list-style-type: none"> • Offers 8 day end to end guided walk in lodge accommodation (not defined but in same 3-4 star accommodation in Margaret River). • Offers 18 departures annually during April, May, September and October. <p>www.worldexpeditions.com.au</p>
Southwest Driving Services	<ul style="list-style-type: none"> • Daily transfers to and from your Accommodation or using your Transport transfers each morning from the end of your days walk to the start each day. Custom day walks. Pack Transfers. Food and water drops. Recovery and Rescue Service Perth and Airport transfers <p>https://www.facebook.com/cyfort2/</p>
Margaret River Passenger Transport	<p>Transport you in small charter vehicles, Generally Luxury 7 seat SUV.</p> <p>www.margaretriverpassengertransport.com.au</p>

APPENDIX B – ACCOMMODATION LIST

ACCOMMODATION	
SECTION ONE	
Pullman Bunker Bay Resort Margaret River	<ul style="list-style-type: none"> • Located very close to Track start point (Cape Naturaliste) approx. 2km • Award winning ‘World Class’ Hotel in Margaret River • Top Hotel Standard range of accommodation options, with studio, one, two and three-bedroom bungalow-style villas • On-site restaurant and day spa facilities <p>https://www.pullmanbunkerbayresort.com.au/</p>
Yallingup Beach Holiday Park	<ul style="list-style-type: none"> • Within 50m of Track • Cabins, caravans and campsites • http://new.yallingupbeach.com.au/
Yallingup Beach Resort	<ul style="list-style-type: none"> • Within 200 m of Track • Self-contained Luxury Beach Accommodation – 7 Modern Three-Bedroom Executive Villas and a One-Bedroom Apartment • https://www.yallingupbeachresort.com.au/
Caves House Hotel	<ul style="list-style-type: none"> • Located within 1km of Track • Caves House Hotel is a heritage-listed iconic hotel. Provides both hotel and apartment style accommodation. • www.caveshousehotelyallingup.com.au
Chandlers Smith Beach	<ul style="list-style-type: none"> • Located within 500m of Track • Well-appointed self-contained 2 brm chalets, right on the Track at Smiths Beach, 3 km south of Yallingup. Sweeping ocean views from your verandah. Ph 08 9755 2062 Fax No 08 9755 2062 Email csbunits@bigpond.com www.chandlerssmithsbeach.com.au
Caves Caravan Park Yallingup	<ul style="list-style-type: none"> • Located approximately 1km from Track • Includes chalets, glamping tents and camping sites • www.cavescaravanpark.com.au
Injidup Spa Retreat	<ul style="list-style-type: none"> • Located within 200m of Track • Surrounded by 3000 acres of Leeuwin-Naturaliste National Park and commanding 180 degree views of the secluded Injidup Beach, Injidup Spa Retreat is the undiscovered gem of Western Australia. The property is meticulously detailed with imported fixtures and fittings, complimented by the work of accomplished Western Australian artists. Each villa is complete with private plunge pool, BBQ and decking. The Small Luxury Hotel of the World organizes personalized tours of the Wardandi land and guided treks with local Aboriginal guides. A treatment and hot spa overlooking Injidup Bay is the ideal way to relax after a days trekking. For more information please visit our website or contact reservations: +61 8 9750 1300 or reservations@injidupsparetreat.com.au www.injidupsparetreat.com.au • Accommodation used by Walk Into Luxury as part of the Great Walks branded experience
Seashells Yallingup	<ul style="list-style-type: none"> • Within 500 m of Track • Set amongst beautiful extensive gardens and just a short stroll to Yallingup Beach. The property offers 1 and 2 bedroom apartments which are fully self contained and are adjacent to the magnificently restored, heritage-listed Yallingup Caves Hotel which features a restaurant and bar. This property is only 500m from the Track and rates start from \$179 per night. Ph 08 9750 1500 Fax No. 08 9750 1533 Email yallingup@seashells.com.au www.seashells.com.au

ACCOMMODATION

SECTION ONE

Smiths Beach Resort	<ul style="list-style-type: none">• Located approximately 200m from Track• Listed as one of the Small Luxury Hotels of The World, the award winning Smiths Beach Resort is the ideal base for Cape to Cape trekkers. Immediately adjacent Smiths Beach, the Resort offers 1,2,3 or 4 bedroom beach houses, villas or apartments. Our beach shacks offer that back to nature experience with all the modern touches. Private and group packages are available including guided touring. For more information please visit our website or contact reservations: +61 8 9750 1200 or email reservations@smithsbeachresort.com.au www.smithsbeachresort.com.au
Wyadup Brook Cottage	<ul style="list-style-type: none">• Located within 2km of Track• Wyadup Brook Cottages have 6 fully self-contained cottages on a peaceful rural setting only 3.5 kms from Injidup Bay/Wyadup. Choose from a one, two or three bedroom cottage. Cape to Cape Track 2 or 3 Night Packages available, or we can tailor make packages to suit individual needs. Packages include accommodation, pick up/drop off transfers on the northern section of the track, Cape Naturaliste to Prevelly, breakfast hamper and packed lunches. Ph (08) 97552294 Email wyadup@inet.net.au www.wyadupbrook.com.au
Yallingup Forest Resort	<ul style="list-style-type: none">• Approx. 2km from Track• Eco-friendly Yallingup chalet accommodation, conveniently located in the majestic Margaret River wine region. Surrounded by nature, close enough to hear the surf. Eco-friendly, self-contained chalet accommodation in bush / coastal forest setting on the ridge above Yallingup Beach, just 2 km from the Track. The chalets have fully-equipped kitchens, pot-belly fires, BBQ's and all linen supplied. Rates: \$140 - \$175 for 2; 10% disc. off-peak to members for 2 night stay or longer. Ph 08 9755 2550 Fax No 08 9756 6016 Email stay@yallingupforestresort.com.au www.yallingupforestresort.com.au
Canal Rocks Beach Front Apartments, Smiths Beach Yallingup	<ul style="list-style-type: none">• Located within 100m from Track• Offers comfortable leisure accommodation at scenic Yallingup just three hours from Perth and provides guests with a range of self-contained accommodation to suit all budgets. Offers studio, two and three bedroom apartments which are spacious, tastefully furnished and include views of the ocean. They include a spa bath, television, DVD and compact disc players as well as a gas log fire and ceiling fans. The fully equipped kitchen caters for all culinary requirements. Located within easy access to Yallingup's shops, Eagle Bay, Dunsborough and Busselton, Canal Rocks Beach Front Apartments offers the chance to explore the region's world-class wineries, restaurants, galleries, golf facilities, majestic forests and pristine beaches. Canal Rocks are unique formations on Yallingup's rugged coastline where the Indian Ocean surges endlessly along a rock-girt channel amongst the popular surf breaks of Three Bears, Yallingup and Smith's Beach.• 97 Smiths Beach Road, Yallingup, Western Australia 6282, Australia (08) 97 552 116 www.canalrocks.com.au
Sienna Lodge, Yallingup	<ul style="list-style-type: none">• Approx. 2km from Track• Sienna Lodge is the perfect place to stay and relax. Offers cosy vineyard accommodation nestled between the valley and the ocean, just minutes to the wild and beautiful Smiths Beach, as well as many local attractions. Sienna Estate makes the ideal base to explore Margaret River Wine Region - you'll love it! Sienna Lodge offers a accommodation options with air-conditioning, free wi-fi internet, flat screen Samsung television with DVD player, CD player, intelligent electronic safe, refrigerator, toaster, tea and coffee making facilities, garden barbecue area and a gift of Momentum Sienna Estate grown wine on arrival. Relax on the verandah with a glass of local wine at sunset, listen to the native birds singing or smell the flowers from the garden.• 8 Canal Rocks Road, Yallingup, Western Australia 6282, Australia (08) 97 552 028 www.siennaestate.com.au
Track Camp Site	<ul style="list-style-type: none">• Located on Track

ACCOMMODATION

SECTION ONE

Mt Duckworth	<ul style="list-style-type: none">• Free basic bush camp for fully self-contained campers / walkers. Includes drop toilet, picnic table, water, no shelters
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ACCOMMODATION

SECTION TWO

Cape Lodge	<ul style="list-style-type: none">• Approx. 2km from track• Voted World's Best of the Best Hotels 2011, Best Boutique Hotel in Australia, World's Top 20 Vineyard Hotels 2010, Conde Nast Traveller Gold List "Best for Food" 2011. Sitting on its own secluded vineyard in the heart of the Margaret River Wine Country is one of Australia's finest small vineyard lodges. As you meander down the winding driveway of our intimate country estate you will discover why Cape Lodge was voted Luxury Travel Magazine's Best Boutique Hotel in Australia and listed in Conde Nast Traveller's Gold List 2011. Surrounded by stunning forest, lake and parkland scenery Cape Lodge is only minutes away from pristine beaches, coastline and the sparkling waters of the Indian Ocean and neighbours the great Margaret River wine estates of Mosswood, Vasse Felix, Cullen and Pierro. Described as one of Australia's finest new generation gourmet establishments the multi award winning gourmet restaurant was ranked in the Top Ten in the World for Food and has recently opened a Gourmet Retreat and Cooking School. Cape Lodge features 22 rooms and suites, the executive five bedroom Private Residence, an all weather tennis court and a beautiful free form swimming pool.• 3341 Caves Road, Yallingup, Western Australia 6282, Australia (08) 9755 6311 www.CapeLodge.com.au
Gracetown Caravan Park	<ul style="list-style-type: none">• Approx. 2km from Track• Gracetown Caravan Park is located approximately 2.5kms off the Cape to Cape Track at Gracetown. Offers a complimentary pick up and drop off service for all Cape to Cape walkers staying at our park. Camping starts at \$15 per person per night and we also have basic park cabins all the way through to fully self contained chalets. We also have a small shop onsite to help replenish any supplies. Here you will find single BBQ packs, bread, milk, water, noodles, pasta, bacon, eggs and other items. We have hot showers and a undercover campers kitchen along with free WIFI so you can stay in touch with loved ones. We offer a complimentary pick up and drop off service for all cape to cape walkers staying at our park to and from Gracetown general store. Camping starts at \$16 per person per night. Ph 08 9755 5301 Fax No 08 9755 5508 Email gracetowncaravanpark@bigpond.com
Olio Bello Glamping	<ul style="list-style-type: none">• Approx. 3km from Track• Located on an olive farm by a picturesque lake• Designed for minimal environmental impact and maximum comfort - each bungalow (total 6) boasts a private en-suite, kitchenette, spacious viewing deck.• www.oliobello.com
Caves Road Chalets	<ul style="list-style-type: none">• Approx. 2km from Track• Nestled in a peaceful natural bush setting Caves Road Chalets offers the perfect base from which to explore the many delights and natural wonders that this unique part of Western Australia's South West has on offer. Situated on 64 acres of natural bushland, only a few minutes from beautiful swimming and surfing beaches, wineries, restaurants, caves, galleries, golfing, bushwalking, fishing, shopping, sight seeing and more! The property is a nature lovers paradise with a huge array of birdlife, wildlife and seasonal wildflowers. Watch the kangaroos grazing at dusk and dawn, and the possums when they come out to play.• Lot 5023 Caves Road, Cowaramup, Western Australia 6284, Australia (08) 97 555 266 www.cavesroadchalets.com.au

ACCOMMODATION

SECTION TWO

Track Campsite Moses	<ul style="list-style-type: none">• Located on Track• Free basic bush camp for fully self-contained campers / walkers. Includes drop toilet, picnic table, water, no shelters
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ACCOMMODATION

SECTION THREE

Acacia Chalets	<ul style="list-style-type: none">• Approx. 2km from Track• Modern, spacious, fully self-contained 2 & 3 bedroom chalets in a natural bush setting with views of the Leeuwin Ridge. Voted #1 on TripAdvisor for 2010. Just 1.5km from the Cape to Cape Track at Gnarabup/Prevelly, Acacia Chalets are a perfect base for day walks north or south or to relax at the end of your trek. Large decks, gas BBQ, all linen supplied & friendly, helpful service. Ph 08 9757 2718 Fax No Email enquiries@acaciachalets.com.au www.acaciachalets.com.au
Glenbrook Estate	<ul style="list-style-type: none">• Approx. 5km from Track• Guesthouse / Lodge style accommodation with 8 rooms around a central courtyard, situated on 190 acres of bushland 5 km south of Margaret River, and offering unbeatable hospitality! Ideally suited to small groups, especially walkers. All bedding supplied; self-catering, or meals provided on request. Separate camping area also available with open fireplace, BBQ, undercover area & hot showers. 12 km from the Track at Redgate or Prevelly. Small bus & driver can be arranged & visits organized to other points of interest. From \$16.50 p/head. 10% disc. to walkers / 'Friends'. Ph 08 9757 2791 Fax No 08 9757 2791 Email glenbrookestate@westnet.com.au
Margaret River Bed and Breakfast	<ul style="list-style-type: none">• Approx. 2km from Track• 4.5 Star B&B at its best. 4 luxury queen bed suites overlooking bush, large en-suite, spa-bath, separate shower, separate toilet, spacious lounge/dining room, gas log fire, alfresco area secluded in pristine forest. TV,. Gourmet cooked Australian breakfasts, home-baked bread, muffins. 5 mins to town, restaurants, beach, vineyards, golf, Margaret River mouth. 5-10 minutes to world renowned vineyards where you can experience the finest in quality food, wine, scenery Escape, indulge and relax. Ph 08 9758 7002 Fax No Email dirk@margaretriverbnb.com http://margaretriverbnb.com
Margaret's Forest	<ul style="list-style-type: none">• Approx. 6-7km from Track• The natural choice in the heart of Margaret River... Margarets Forest self contained apartments are located where the forest meets the picturesque town of Margaret River. The complex adjoins natural forest and bike and walking trails amidst karri, marri and peppermint trees as well as the main street with all it has to offer right on its doorstep. In fact, the accommodation is so conveniently located, you can stroll out onto the cafe strip and enjoy the unique characteristics of the township. From the entrance, a left turn will lead you to the edge of town, where you can explore the forest or linger by the river, cycle the tracks or even picnic with nature. A right turn leads you more to the action of town. Shops, restaurants, galleries, cafés, boutiques and supermarkets... all within 2 minutes reach. Ph 08 9758 7188 Fax No 08 9758 8507 Email stay@margaretsforest.com.au www.margaretsforest.com.au
Prevelly Park Beach Resort	<ul style="list-style-type: none">• Approx. 1km from Track• Budget style Caravan park in delightful setting located 300 metres from pristine beach in protected bay. On site vans,

ACCOMMODATION

SECTION THREE

	<p>cabins and cottages (self-contained). Linen hire available. Well-stocked shop for all your supplies. 10% discount for Friends' members. Ph 08 9757 2374 Fax No 08 9757 2790 Email Prevellyparkbookings@preveliwines.com.au</p>
<p>Prevelly Villas</p>	<ul style="list-style-type: none"> • Approx. 1km from Track • Superbly located oceanside holiday houses, ON the Cape track through Prevelly Park. No taxis or drop-offs needed, plus you have the convenience of a shop/liquor store, and restaurant, opposite the houses. Easy! Prevelly Villas offers you the choice of five self-contained houses, each with 3 bedrooms to sleep 6 persons. We warmly welcome Track walkers to our houses and understand the need for comfort and good rest. Peter and Deirdre are very happy to assist in any aspect of a planned walk and feedback indicates that Prevelly is a good base to do at least two parts of the walk from the north or south of the route. We're great value Ph 08 9757 2277 Fax No 08 9757 2277 Email prevills@westnet.com.au www.prevellyvillas.com.au
<p>Redgate Beach Escape</p>	<ul style="list-style-type: none"> • Approx. 2km from Track • Four contemporary designed, 2 brm chalets with panoramic ocean views, set on 80 acres and surrounded by National Park. Just 1 km back from the Track at Redgate Beach. Rates from \$180 to \$260. Ph 08 9757 6677 Fax No Email contact@redgatebeachescape.com.au www.redgatebeachescape.com.au
<p>Surfpoint Resort</p>	<ul style="list-style-type: none"> • Approx. 1km from Track • Surfpoint Resort is the perfect location to stop, revive and re-stock midway through your Cape to Cape walking experience. Surfpoint Resort is located just meters off the official track, making it the easiest accommodation to walk into. Surfpoint Resort can also organise meals, track transfers and any other walking supplies that may be needed to be replenished midway through your trip (please note that these services need to be pre organized in advance). For more information, bookings or any questions please contact us either at office@surfpoint.com.au or give us a call on 08 97571777. www.surfpoint.com.au A: 12 Riedle Drive Gnarabup Western Australia 6285 T: +61 8 9757 1777 E: office@surfpoint.com.au or surfpointresort@outlook.com
<p>Margaret's Beach Resort</p>	<ul style="list-style-type: none"> • Approx. 1km from Track • Just 10 kilometres from Margaret River town, on Western Australia's spectacular South West Coast, and just 500 metres from pristine Gnarabup Beach, Margaret's Beach Resort is the only resort accommodation by the sea. Offering idyllic 4 Star apartment accommodation, Margaret's Beach Resort offers a range of accommodation options for your Margaret River break. Choose from Studio Apartments, One Bedroom Spa Apartments, and Two Bedroom Apartments and Townhouses with and without spas. There is even a Four Bedroom Beach House which sleeps up to eight people for those family or small group holidays. • 1 Resort Place Gnarabup Beach, Margaret River, Western Australia 6285, Australia (08) 9757 1227 www.margaretsbeachresort.com.au
<p>Track Campsite Ellensbrook</p>	<ul style="list-style-type: none"> • On Track • Free basic bush camp for fully self-contained campers / walkers. Includes drop toilet, picnic table, water, no shelters

ACCOMMODATION

SECTION FOUR

Hamelin Bay Holiday Park	<ul style="list-style-type: none"> • Approx. 500m from Track • Lovely shady setting under peppermint trees close to beach & right on the Track. Wood available in winter months. LPG gas. Kiosk with cold drinks, tea / coffee, pies, ice-creams, confectionery. Kiosk hours in winter are limited. Please call beforehand. Standard Cabins (without ensuite) from \$90, Cabins with ensuite from \$135, powered sites from \$32, unpowered from \$26. Prices are for two people - there is a charge for extras. Ph 08 9758 5540 Fax No. 08 9758 5016 Email bookings@hamelinbayholidaypark.com.au and website www.hamelinbayholidaypark.com.au
Leeuwin-Naturaliste National Park campground Contos	<ul style="list-style-type: none"> • Within National Park approx. 1km from Track • \$15 per adult / night (concession and child rates also apply) – large drive-in campground with 116 campsites, drinking water, toilets, picnic tables, communal BBQ / cooking shelters. Bookings can be made online www.parks.dpaw.wa.gov.au
Leeuwin-Naturaliste National Park campground Point Road	<ul style="list-style-type: none"> • Within National Park approx. 2km from Track • Point Road - \$11 per adult / night – small open campground can accommodate up to 7 tents. Toilets, BBQ, picnic table, no water. Online bookings not available.
Leeuwin-Naturaliste National Park campground Boranup	<ul style="list-style-type: none"> • Within National Park, approx. 2km from Track • \$11 per adult / night – small campsite with only 7 sites (tent only), toilets available, no water on-site. No bookings can be made.
Bush Camp Margaret River	<ul style="list-style-type: none"> • Private campsite managed by Explorus, Outdoor Education Group • Tailored for school groups of up to 160 people. • Onsite bush camp and bunkhouse, students participate in a range of activities within the Leeuwin Naturalise National Park including abseiling, canoeing and hiking along parts of the Cape to Cape. • https://www.oeg.edu.au/territory/wa/camp-margaret-river/

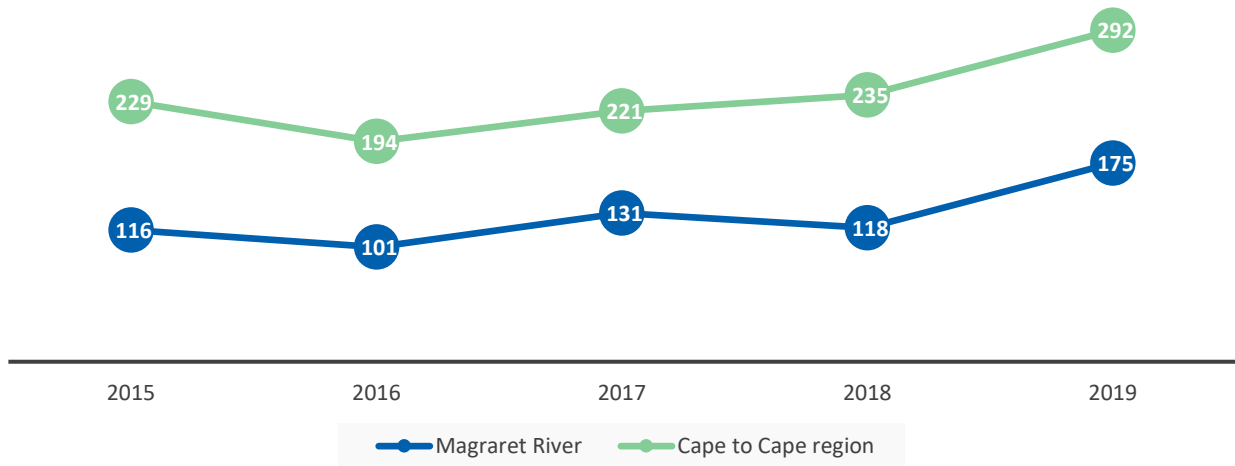
ACCOMMODATION

SECTION FIVE

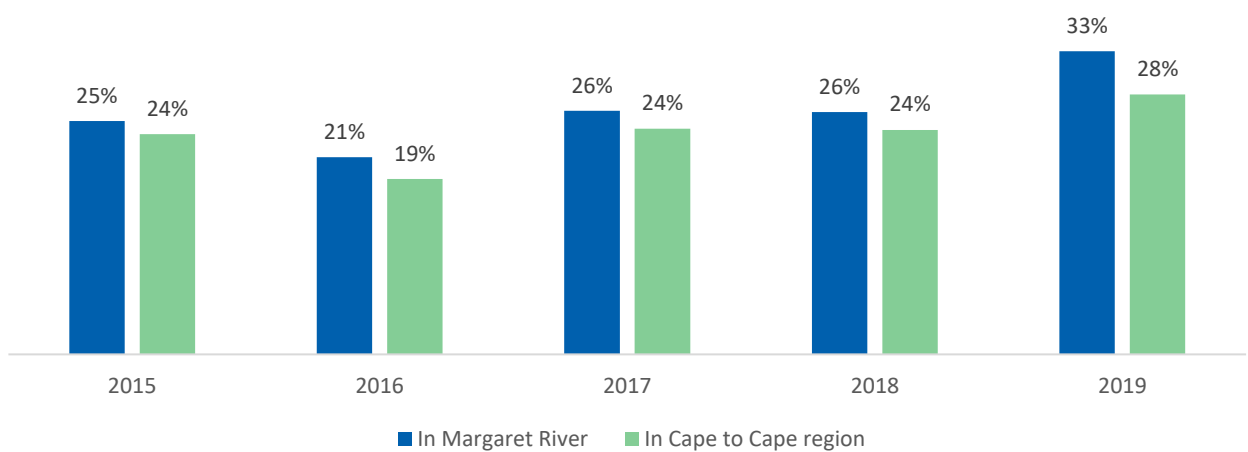
Alouarn Apartments	<ul style="list-style-type: none"> • Approx. 3km from Track • Relax after your walk in brand new luxury apartments in the heart of Augusta. Sweeping ocean & river views. Vouchers to enjoy at the nearby Deckchair Cafe. Ph 0428 575 116 Email info@alouarnapartments.com.au www.alouarnapartments.com.au
Anchors at Augusta	<ul style="list-style-type: none"> • Approx. 3km from Track • Great ocean and river views! Brand new luxury apartments! Central location! You'll be impressed by these luxurious solar passive apartments and their affordability. What a great way to start or finish your Cape to Cape walk! Ph 0419 581 298 Fax No Email anchorsataugusta@bigpond.com www.anchorsataugusta.com
Augusta Hotel-Motel	<ul style="list-style-type: none"> • Approx. 5km from Track • Riverfront motel features superb views from most units and dining areas. On-site restaurant. Free in-house movies. Also backpacker accommodation and self-contained chalets available. Comfortable accommodation at the end of a hard walk! Can supply packed lunch. Rates from \$71 dbl. off-peak. Ph 08 9758 1944 Fax No 08 9758 1227 Email frontdesk@augusta-resorts.com.au www.augusta-resorts.com.au
Augusta Sheoak Chalets	<ul style="list-style-type: none"> • Approx. 2km from Track • Peaceful rural setting on the Leeuwin Ridge (Hillview Road) behind Augusta, with great views over farmland and river, 5km from Track, 3km from Augusta. Three chalets (\$150 pn for 2, with \$25 per extra person. Chalet 4 with sleeping for 16, \$490 pn for 8, with \$25 p.ex.p, Chalet 5 with sleeping for 12, \$450 pn for 8, with \$25 p.ex.p and large commercial kitchen and seating for large groups. Ph (08) 9758 1958 Email bookings@sheoakchalets.com.au Web www.sheoakchalets.com.au
Wrenwood Chalets	<ul style="list-style-type: none"> • Approx. 2km from Track • Your two bedroom chalet is nestled in a unique and beautiful Australian bush setting, offering complete privacy on the 100 acre natural bush and wetland property. All of the facilities for self catering are provided in these spacious colourbond and timber dwellings and the wood fire and leather lounges create a very cosy atmosphere in which to plan your day's adventure on the Track. We can also cater (delicious vegetarian) for all of your meals and drop you off and pick you up along the Track, from Prevelly to Augusta. We are located on Caves Road opposite Cresswell Road which leads to the Beach and the Cape to Cape Track 3 kms away. The Cosy Corner turn off is 3 kms west of us and Jewel Cave is 2 kms east. Ph 08 9758 4070 Email wrenwoodchalets@activ8.net.au www.wrenwoodchalets.com
Our Place Augusta	<ul style="list-style-type: none"> • Approx. 5km from Track • Start or finish your Cape to Cape journey with Our Place Augusta - perfectly located in town. This converted family home provides a range of accommodation options to our guests - from 1 to 9 people. Similarly shared and exclusive arrangements are available. Facilities include fully equipped kitchen, lounge, dining and BBQ & patio area. We provide the full service. We can arrange you transport to and from the track, provide you packed lunches and also have space for you to leave your car while you complete the track. Prices start at \$65pp for a queen room. Book direct via our website, email, phone or on AirBnB. P. +61 427 002 763 E. booking@augusta.wa.au W. http://www.ourplaceaugusta.com F. https://www.facebook.com/OurPlaceAugusta <https://www.facebook.com/OurPlaceAugusta/>
Track Campsite Deepdene	<ul style="list-style-type: none"> • Approx. 500m from Track • Free basic bush camp for fully self-contained campers / walkers. Includes drop toilet, picnic table, water, no shelters

APPENDIX C – TOURISM RESEARCH AUSTRALIA (TRA) DATA ANALYSIS

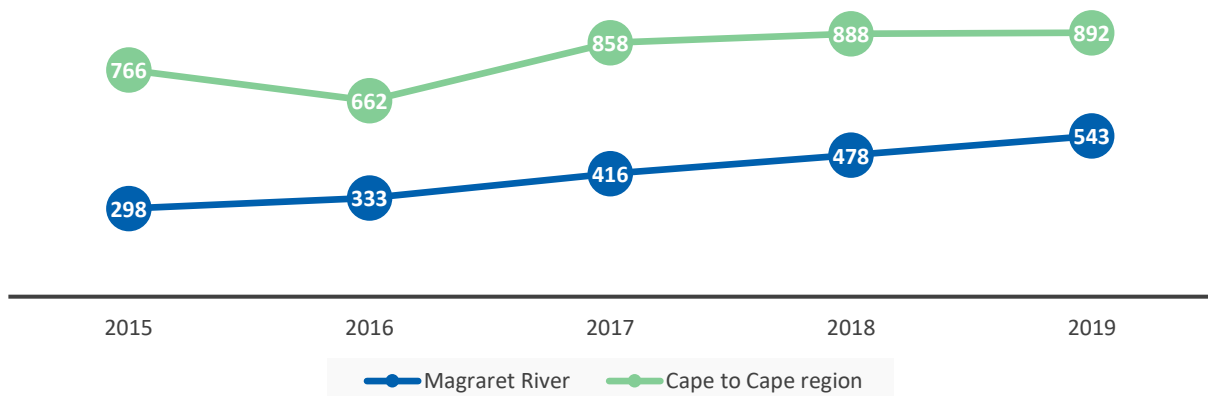
Number of overnight domestic bushwalkers in both the Margaret River and Cape to Cape regions ('000s)



Participatory ratio in bushwalking by overnight domestic visitors



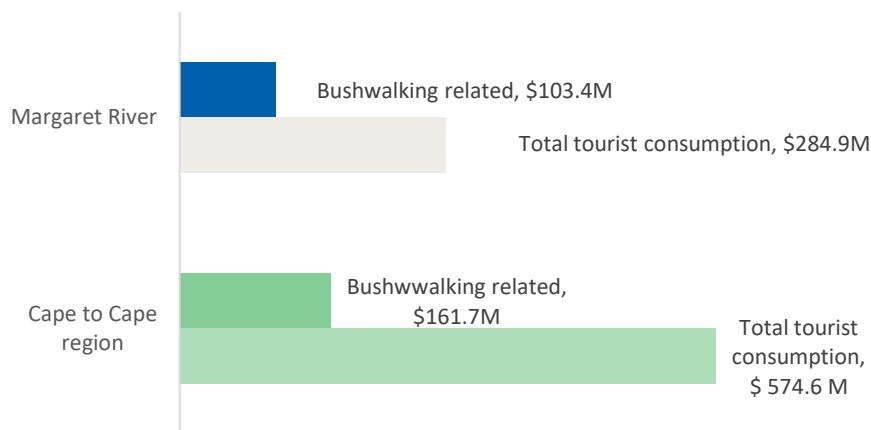
Accumulative nights spent by domestic visitors engaging in bushwalking activity in Margaret River / Cape to Cape Region



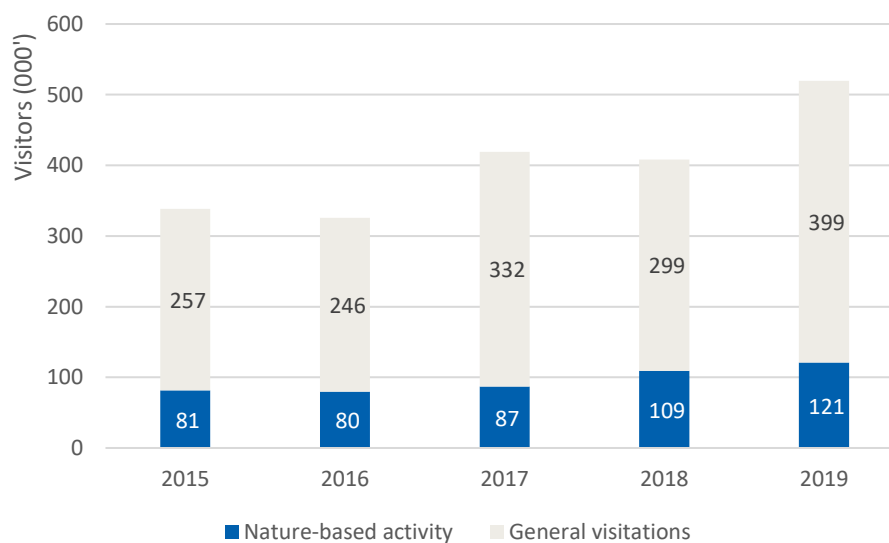
ALOS of bushwalking visitors versus general visitors in Cape to Cape region



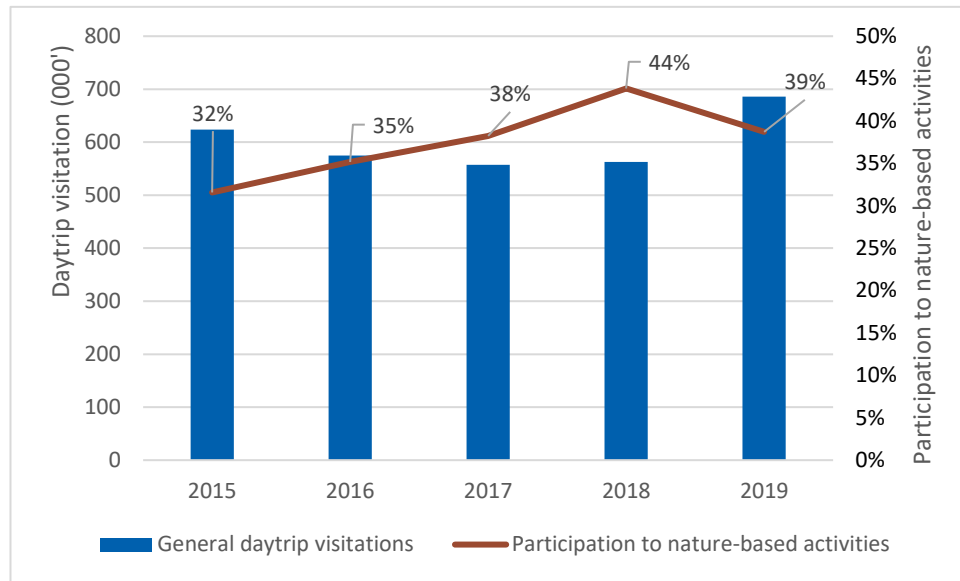
Expenditure of visitors engaged in bushwalking and total tourism consumption



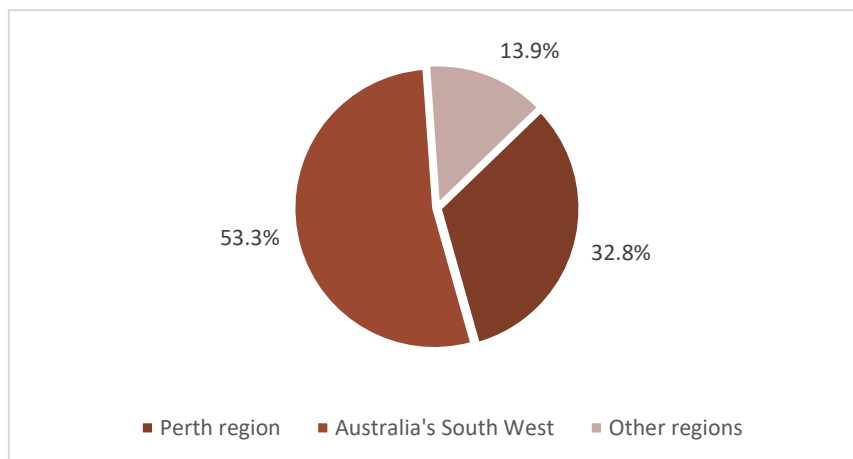
Daytrip visitations to Margaret River and preference on nature-based activities



Daytrip visitations to Cape to Cape region and their tendency to undertake nature-based activities (2015-2019)²⁷



Source markets of daytrip visitations in Cape to Cape region (2019)



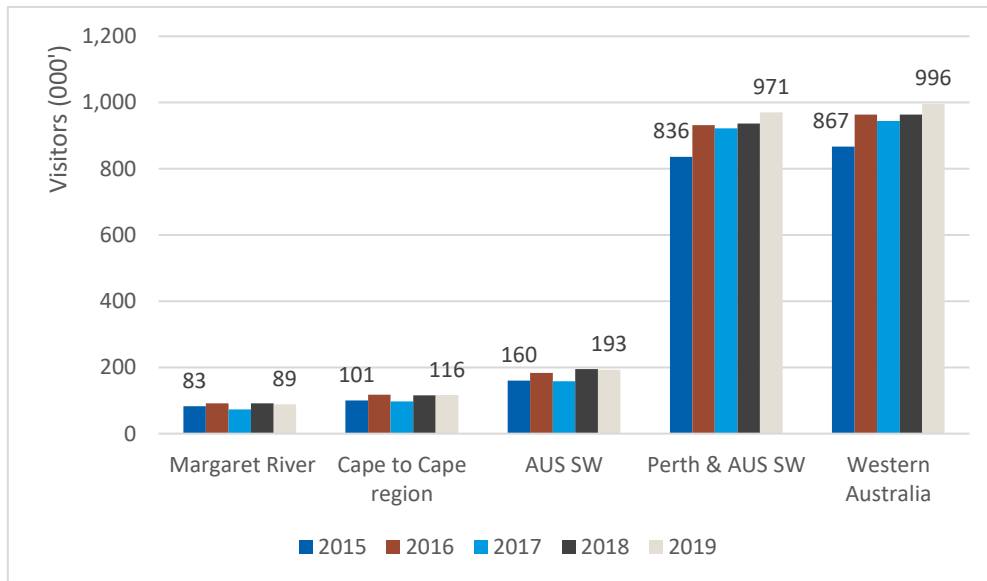
²⁷ Data analysis collected by Earthcheck – Cape to Cape Region bushwalking analysis sourced from TRA, May 2020

International Visitors: Comparative Market Trends in Margaret River, Cape to Cape region, Australia’s South West, Perth & Australia’s South West and Western Australia

In 2019, the Cape to Cape region welcomed more than 116,000 international visitors, with 89,000 in Margaret River and additional 27,000 visitors to the Augusta and Busselton region.

Over a five-year period (2015-2019), the growth of inbound visitors to Margaret River was 1.8%, slower than the growth rate for Australia’s South West and Western Australia (5.2% and 3.7% respectively).

International visitors to Margaret River, the Cape to Cape Region, Australia’s South West, Perth and all WA for comparison.



APPENDIX D – TRENDS

The Global walking market

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

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

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

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

Other trail trends

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

Eco and nature-based accommodation and experiences

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

Ecotourism is a niche segment within the broader category of **nature-based** and sustainable tourism. The ecotourism segment of consumers and experiences are those that seek to enhance a nature-based experience with both sustainable operating practices and engaging interpretation of the natural and cultural landscape. This educational element, mixed with sustainable practices, is

what separates ecotourism from nature-based and mainstream sustainable tourism. It engages and informs visitors and is managed to be ecologically, economically and socially sustainable by contributing to the wellbeing of the natural areas and local communities where they operate.

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

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

- More than 2.2 million Australians (1 in 10) intend to partake in ecotourism in the next 12 months, both within and outside of Australia
- Ecotourists tend to be younger travellers (72% under the age of 45) which aligns with the growth in the uptake of great walks for the 40-50 year old market
- Ecotourists are generally travelling as a couple (40%), with similar statistics for other travel types including groups (23%), families (19%) and solos (18%)
- People intending to take ecotours are highly educated with 30% having an undergraduate or higher degree
- Environmental and social responsibility are important considerations of purchase by ecotourists
- 72% of travellers would like companies to tell them more about how they are making a positive difference to society so they can support them
- Sustainability is of great focus for Australians, with 68 percent of Australians acknowledging that they are concerned for the environment, while travellers are becoming more aware of the impacts of their actions on the environment.²⁸

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

There has also been a boom in modular designs, many of which can be best described as semi-permanent or demountable. Designs often have Scandinavian minimalist markers, with “getting away from it all/ getting back to nature” at the heart of their selling propositions.²⁹ An overview of the types of eco-accommodation is provided in Table below.

²⁸ <https://www.nielsen.com/au/en/insights/article/2019/eco-tourism-is-not-just-for-greenies/>

²⁹ Earthcheck Report on potential trends relevant to the C2C experience 2020

Typical categories of accommodation which can be classified as eco-accommodation

Basic campground



Example – The Larapinta Trail in the NT consists of a total of 41 campsites along the 223 km long trail. Campsites are basic and can be selected based on user needs – this varies from complete remote sites with cleared section for hiker tents, through to sites with tent pads, rainwater, toilet facilities, shelters and picnic tables. The offer along the Larapinta Trail meets the ‘basic’ and ‘moderate’ standard of on trail hiking accommodation.

Characteristics

- Land designated and managed for the purpose of short-term recreational lodging or camping in tents or other temporary shelter.
- Low intensity use – some sites may include amenity buildings, cabins and manager’s facilities.
- Often run by Councils or national park agencies or can be self-managed.
- Predominantly unpowered sites/ sometimes a small number of powered sites dependent on location and market need.
- Basic communal facilities i.e. amenities, some have hot water, gas BBQs.
- Often located in scenic reserves and/or parks.
- Usually located outside town limits.

Typical visitor markets

- Attract guests looking for a camping experience.
- Meet the needs of RVs (self-contained camping).
- Grey nomad and touring markets.

Typical cost

From Free (Larapinta Trail), \$3.30pp (NT Parks and Wildlife), \$6pp (NSW Parks) up to \$32.90 (Great Ocean Walk).

Cabin



Example – Scenic Rim Trail Queensland experience with Spicer’s Eco Retreat. Connects with Great Walks of Australia, providing 2-5 day guided walk with luxury exclusive (group only) eco accommodation (cabins and glamping options). The Spicer’s accommodation range is working towards zero carbon emissions by 2030 through a range of energy efficient, construction and waste initiatives.

www.spicersretreat.com

Characteristics

- The term cabin (sometimes referred to as a lodge) can refer to a number of accommodation types such as hostel / hotel/ motel rooms. However, in a nature-based tourism context most typically can be regarded as a discrete self-contained commercial accommodation property, often at the luxury end of the market.
- Can be discrete single properties or organised around a small number (less than 20) of units/ properties on a single site
- Often self-contained, but can also be presented as serviced properties with some central facilities – dining etc
- Can be integrated with associated leisure experiences – spa, walking, nature-based activities

Typical locations

- At the luxury end of the market, lodges most favour rural locations.

Typical visitor markets

- Often positioned at the upper end of the leisure market – predominantly short break demand

Typical scale of development

- Gross floor area of structures or buildings: 10-20%
- Total Site area: 4-8 ha
- No. of cabins/rooms: Varied scale, though typically small scale with approximately 20 rooms. Can include individual properties up to small groups of units on a planned site.
- Permanent structures, often in brick/concrete or substantial wood cabin build.

Typical cost

Aquila Eco Lodge (Grampians) - \$690 / night

Airlie Beach Eco Cabins - \$150 / night room only

Jenolan Eco Cabins (Blue Mtns) \$160 / night room only

Daintree Eco Lodge \$495 / night room only

Glamping/pods/other demountable accommodation



Example – Paperbark Camp, Jervis Bay NSW. Built on the eco accommodation ethos, providing glamping options among the Eucalypt trees. Offers standard ‘glamping’ tents through to King Deluxe (larger with luxury furnishings and indoor hot tub).

Characteristics

- Glamping is a form of camping but involving accommodation and facilities more luxurious than those associated with traditional camping.
- Fusion of glamour and camping.
- Not necessarily a tent. Typically, permanent/ semi-permanent cabin-like or ‘stilted’ structures.
- Comfortable furnishings and access to amenities such as electricity and running water
- Generally private and secluded.
- Can be delivered as temporary or demountable structures.

Typical locations

- Glamping typically takes place in relatively secluded outdoor location s- beaches, forests, national parks etc.
- Located away from populated areas.

Typical visitor markets

Varied visitor market, appeals to a number of demographics due to variety of locations and experiences on offer - relatively high price point makes the market distinct from camping.

Typical scale of development

- Gross floor area of structures or buildings: 5-15%.
- Total Site area: 3-5ha.
- No. of cabins/rooms/tents: Typically, small scale (up to 20 units), in line with their luxurious reputation, however, can cater to larger groups.

Typical cost

Karinjini Eco Retreat Deluxe Eco Tent with Ensuite - KING \$399 / night including breakfast for two.

Paperbark Camp \$785 / night, dinner and breakfast included.

Eco Beach Resort, Broome - \$113 per night (Eco Tent) or \$225 (Eco Villa).

APPENDIX E – GREAT WALKS OF AUSTRALIA (GWOA)

Tourism Australia has created the Signature Experiences Program, designed with the High Value Traveller in mind. Packages have been developed to promote Australia's outstanding tourism experiences within a variety of niche areas and special interest categories, such as - wineries, luxury lodges, golf courses, guided walks, Aboriginal guided experiences, fishing adventures, wildlife encounters and cultural attractions. Tourism Australia has strategically partnered with industry collectives that can deliver on the Signature Experience proposition. The Great Walks of Australia is one of the signature experiences delivered through a marketing collective of operators. One Cape to Cape operator is included in the Program (Walk into Luxury). Presently, the core of the Great Walks walking market is domestic. GWOA have reported the current walker split to be broadly 80% domestic and 20% international. One of the core goals of GWOA is growing awareness of Australia as a walking destination internationally. At the same time, GWOA realise the significant potential for growth in sales volume also lies with the domestic market.

Across Australia's 'signature' trails it is estimated that approximately 500 - 1000 visitors per annum take part in the individual great or fully facilitated signature walks. Although this market is considered very small relative to other visitor markets, the per visitor yield is significantly more, with estimated daily per person expenditure of \$590. It is understood there has been growth in supported walking since the creation of the Great Walks of Australia collective, of approximately 10%.³⁰ This has been driven by:

- Increased demand for this style of experience
- Broadening of the demographic
- Additional walks joining the membership collective
- Current walks increasing their number of departures or maximising their group size as they had factored in capacity for growth in the initial product development phase.

The criteria for Great Walk membership requires operators to offer:

- A walking experience in an iconic location
- Two nights or more high quality guided product
- Exclusive access to a high standard of unique, quality accommodation
- Caters for small groups of up to 16 with a maximum of 10 guests to 1 guide ratio
- Delivers a market preference of shorter 3 – 4 days with 10 – 14 km of walking per day
- Offers excellent standards of "Aussie hospitality" and high quality food offerings.³¹

³⁰ GWOA pers comm

³¹ Great Walks of Australia Business Plan 2018-2021 **Cape to**

Great walk analysis

Name of Walk	Location	Operator	Recommended Itinerary	Distance	Type of Accommodation	Guest Capacity	AUD price pp (Low / High Season)
Cradle Mountain Huts Walk (Overland Track) 	Tasmania, AUS	Tasmanian Walking Company www.taswalkingco.com.au	6 days / 5 nights	65 km	Cradle Mountain Huts	Maximum of 12	\$3,695 / \$4,395
Bay of Fires Lodge Walk 	Tasmania, AUS	Tasmanian Walking Company www.taswalkingco.com.au	4 days / 3 nights	33 km	Forester Beach Camp and The Bay of Fires Lodge	Maximum of 10	\$2,395 / \$2,750
Freycinet Experience Walk 	Tasmania, AUS	Freycinet Experience Pty Ltd www.freycinet.com.au	4 days / 3 nights	37 km	Friendly Beaches Lodge	Maximum of 10	\$2,520 / \$2,950
The Maria Island Walk 	Tasmania, AUS	The Maria Island Walk www.mariaislandwalk.com.au	4 days / 3 nights	34 – 43 km	Wilderness Glamping and Bernacchi House	Groups of no more than 10 walkers	\$2,550 / \$2,600

Name of Walk	Location	Operator	Recommended Itinerary	Distance	Type of Accommodation	Guest Capacity	AUD price pp (Low / High Season)
Three Capes Track Lodge Walk 	Tasmania, AUS	Tasmanian Walking Company www.taswalkingco.com.au	4 days / 3 nights	48 km	Crescent Bay Lodge and Cape Pillar Lodge.	Maximum of 14	\$2,895 / \$3,095
Larapinta Trail Walk 	Northern Territory, AUS	World Expeditions www.larapintatrailwalk.com.au	Guided walks range from 3, 6, 9, 12 and 14 days. Self-guided options also available.	223 km (Divided into 12 sections)	Semi-permanent campsites with Safari-style sleeping tents	Unknown	3 days Larapinta Experience in Comfort from \$1,495 6 days Classic Larapinta Trek in Comfort from \$2,985
Scenic Rim Trail 	Queensland, AUS	Spicers Retreats www.spicersretreats.com	2 days / 1 night	28 km	Spicers Canopy Glamping Tents	Unknown	\$1,490 / \$1,690
The Arkaba Walk 	South Australia, AUS	Wild Bush Luxury www.arkabawalk.com	4 days / 3 nights	45 km	Blacks Gap Signature Swag Camp, Elder Swag Camp and Arkaba Homestead	Maximum of 10	\$2,400 / \$2,900

Name of Walk	Location	Operator	Recommended Itinerary	Distance	Type of Accommodation	Guest Capacity	AUD price pp (Low / High Season)
Twelve Apostles Lodge Walk 	Victoria, AUS	Australian Walking Company www.auswalkingco.com.au	4 days / 3 nights	47 km	Twelve Apostles Lodge	Maximum of 10	\$2,195 / \$2,550
Milford Track 	South Island, NZ	Ultimate Hikes www.ultimatehikes.co.nz	5 days / 4 nights	54 km	Glade House, Poppelona Lodge, Quintin Lodge and Mitre Peak Lodge	Maximum of 50	\$2,125 / \$2,759
Routeburn Track 	South Island, NZ	Ultimate Hikes www.ultimatehikes.co.nz	3 days / 2 nights	32 km	Mackenzie Lodge and Routeburn Falls Lodge	Maximum of 50	\$1,406 / \$1,954
Grand Traverse 	South Island, NZ	Ultimate Hikes www.ultimatehikes.co.nz	6 days / 5 nights	66 km	Steele Creek Lodge, McKellar Lodge, Mackenzie Lodge, Routeburn Falls Lodge	Maximum of 24	\$1,821 / \$2,411

Name of Walk	Location	Operator	Recommended Itinerary	Distance	Type of Accommodation	Guest Capacity	AUD price pp (Low / High Season)
Best of Yellowstone Tour (Yellowstone National Park) 	Montana, USA	Wildland Trekking www.wildlandtrekking.com	5 days / 4 nights	48 km	Canyon Lodge, Old Faithful Inn, Old Faithful Snow Lodge, Roosevelt Hotel, Grant Village Lodge	Maximum of 12	From \$3,425
Cape to Cape Track 	Margaret River – Busselton WA	Walk into Luxury www.walkintoluxury.com.au	4 days / 3 nights	41 km	Injidup Spa Retreat	Maximum of 12	From \$2,690 pp

APPENDIX F – CASE STUDIES

Three Capes Track, Tasmania



Lessons for C2C:

- Provides the preferred 4 day itinerary
- Visitor interpretation and artistic furniture / installations enroute
- Fee for self walkers includes overnight hut styled accommodation and value add activities such as transfers, guidebook and maps, entrance to Port Arthur Historic Site (A consideration for C2C to offer this for entry into caves or lighthouse experiences)
- Additional local business opportunities created such as equipment hire, gourmet food packs, pre/post accommodation and shuttle services
- Capped at 48 walkers departing daily, the walk is one directional
- Partnership with Great Walks operator who has installed two exclusive eco-accommodation facilities on track.
- Managed by Tasmanian Parks who receive some revenue from track fees and also site lease agreement with the Great Walks operator.

The Three Capes Track is a 4-day/3-night hike in Tasmania's south, totalling 48 kilometres in length. The walk is graded easy to moderate and leads visitors through a myriad of natural landscapes with exhilarating clifftop outlooks on Cape Pillar and Cape Hauy and stunning views to Cape Raoul. The trail experience starts at Port

Arthur, with a 60-90 minute boat ride including interpretation around the Southern Peninsula to the start of the track.

The first day is a 4 kilometre walk. Day two is 11 kilometres, day three 19 kilometres and day four 14 kilometres. The Track can either be undertaken as a self-guided experience, or with the one licensed commercial operator as part of the 'Great Walks of Australia' Signature Experience.

TRACK FACILITIES

The track is well-defined and purpose-built including timber boardwalks and several sections of stone steps. It also includes a series of interpretive encounters along the track, marked by whimsically-shaped benches and artistic installations. An accompanying handbook explains the tale of the Tasman Peninsula's human and natural history at each stop.

Accommodation:

For self-guided: (Budget/Mid-Range) Overnight accommodation is at huts managed by Parks and Wildlife Service, with shared rooms featuring mattresses, toilets and all cooking facilities and equipment provided. Cold showers are also available.

The fee for 3 nights on a self-guided visit to the Three Capes Track is \$495 per person. This includes: entry to Port Arthur Historic Site (valid

for 2 years), car parking and secure lockers; Pennicott Wilderness Journey cruise departing Port Arthur twice daily; 3 nights self-catered accommodation in cabins on track; bus transfer from Fortescue Bay back to Port Arthur Historic Site twice daily; "Encounters on the Edge" guidebook with maps and trail access.

A maximum of 48 people on a self-guided experience can depart each day with bookings made online. Walkers can only travel in one direction.

Great Walks High Value experience: The Tasmanian Walking Company is the only guided walking company authorised by the Tasmanian Parks & Wildlife Service to offer the Three Capes Track and stay within the national park each night. The Company has constructed two high-end huts that offer fully serviced and accommodation packages, including all bedding, hot showers and food and wine.

The two lodges rest lightly within the natural environment. Sustainability features include water-recycling showers, Ornilux bird glass and the latest solar power technology. Bird-friendly Archimedes wind turbines bolster their renewable energy resources. They have also worked closely with the topography of the land – each lodge aligning to contours of the existing landscape. This not only has minimised the impact on the surrounding vegetation but allows the accommodation to blend into nature's setting.

Maximum group sizes are 14 and average daily walking distance is 12 km. Rates: From AUD \$2,790 twin share

TRAIL USE

Parks and Wildlife Service figures show that around 600 people per year hiked on the old tracks south of Cape Huay before the creation of the official Three Capes Track. More than 1300 people hiked the Three Capes Track in the first

month of its opening. Since 2015, trail user numbers have grown from 5,000 per annum to 12,000 in 2018-2019.³² To estimate the cost of \$495 per person by 12,000 assumes a return of \$5.94M per annum.

In addition to the Track fee, a range of commercial operators now provide services for Three Capes Track walkers including accommodation pre and post walk, shuttle services and 'gear and gourmet' food and equipment supplies. Although only one commercial operator can offer accommodation on the actual track, others are offering guided experiences on the track with accommodation off-track.

For visitors that do not wish to complete the entire 3 night Three Capes Track experience, Parks and Wildlife Service has also facilitated a 29 kilometre round-trip walk that accesses Cape Pillar via the old Cape Pillar track from Fortescue Bay, with a formal campsite provided at Wughalee Falls featuring tent platform, toilet and rainwater tank.

Some of the tourism and planning accolades that the Three Capes Track has received include: Best New Tourism Business – Tasmanian Tourism Awards – 2016; Best New Tourism Business – Qantas Australian Tourism Awards – 2016; International Planning and Design Award – American Trails – 2017; Tasmanian Development of the Year – Property Council of Australia – 2018; Ecotourism Winner – Tasmanian Tourism Awards – 2018.



³² Visitor numbers to selected parks and reserves, Tasmanian Parks and Wildlife 2019

Great Ocean Walk, Victoria, Australia



Lessons for C2C:

- Day, short and longer walk options available
- Shuttle services provided for those who want off-track accommodation (not camping)
- 'O-walk' accommodation network for those seeking non-camping
- Network of 40 marketing partners. In 2009, the Walk provided an estimated annual impact of \$15 million (including marketing, visitor expenditure and flow-on expenditure) and more than 100 full-time jobs.'

The Great Ocean Walk is Victoria's premier long distance walk. It stretches approximately 104km along the south-west coast and traverses the coastline and forest from Apollo Bay to the iconic Twelve Apostles, Port Campbell National Park.

The trail offers walkers the option of short walks to day hikes and longer 7 night / 8 day camping experiences. The proximity to local towns also allows for visitors to stay in 'o-walk' accommodation and enjoy a variety of independent or packaged services, such as tours, guides, transport providers, food and wine.

Most of the Great Ocean Walk sections could be classified as suitable for most ages and fitness levels, with some bushwalking experience recommended.

The sections of the Great Ocean Walk can be broken up by campsite stops.

- Section 1 – Apollo Bay Visitor Information Centre to Elliot Ridge Campsite = 10.3km
- Section 2 – Elliott Ridge Campsite to Blanket Bay Campsite = 13.3km
- Section 3 – Blanket Bay Campsite to Cape Otway Campsite = 11.4km
- Section 4 – Cape Otway Campsite to Aire River Campsite = 9.8km
- Section 5 – Aire River Campsite to Johanna Beach Campsite = 15.3km
- Section 6 – Johanna Beach Campsite to Ryans Den Campsite = 14.8km
- Section 7 – Ryans Den Campsite to Devils Kitchen Campsite = 15.3km
- Section 8 – Devils Kitchen Campsite to Great Ocean Road information bay adjacent to Glenample Homestead = 14.1km

Self-guided walkers can choose to have accommodation arranged off the track with shuttle services to trailheads daily or to use the campsites along the route. Each campsite has 8 individual camp 'pads' set into the surrounding bushland which can accommodate a 2-3 person tent. Registration fees apply at these campsites and hikers must book at least two weeks in advance.

Camping fees for Great Ocean Walk purpose built hike-in campsites.

Individual: Per tent, per night. Maximum of 12 people. One 2-3 person tent, per tent site, max 4 sites \$32.30

Small Group: Per tent, per night. Maximum of 18 people. One 2-3 person tent, per tent site, max 6 sites. \$29.00

Part of the appeal of the walk is that it is accessible to everyone, from visitors that want to carry their own equipment and walk independently, to those who wish to only carry a daypack and enjoy a more luxurious transfer and accommodation hosted option.

There are no trail fees to walk the Great Ocean Walk.

Opened in January 2006, the Great Ocean Walk displayed signs of immediate economic benefits. The Victoria's Trails Strategy 2013-2023 stated that the Great Ocean Walk involved 'more than 40 marketing partners; and in 2009, the Walk provided an estimated annual impact of \$15 million (including marketing, visitor expenditure and flow-on expenditure) and more than 100 full-time jobs.'



Barwon South West Adventure Trails, Victoria



Lessons for C2C:

- Substantial collaborative planning work undertaken (vision, business case, tourism and marketing strategy, guidelines, design and management)
- Connects existing trails to establish a network, leveraging existing high profile regional trails to market lesser known experiences
- Strong investment commitment in trail improvements and strategy implementation (\$40M over 6 years) with forecast regional economic benefits of \$74.7M and creation of 273 jobs over 10 years.

The Barwon South West region of Victoria wanted to plan and position itself as an adventure trails destination. The region covers 9 local government areas and incorporates numerous reserves, natural areas and visitor destinations.

Previous planning efforts for walking, cycling and mountain biking had been challenged by the complexity of the region, its numerous stakeholders and the large range of trails and trail management arrangements.

Over 20 trails already existed in the region, including 6 international and nationally significant trails and mountain biking hubs. An impressive calendar of international and national cycling and trail based events was also in place.

A Vision and Business Case, Action Plan, Cycle Tourism Strategy, Marketing Strategy and Guidelines for Trail Planning, Design and Management were each prepared to achieve a coordinated and collaborative approach in developing a leading trails destination.

The approach taken was visitor-centric, rather than a landowner/manager approach and best-practice from world leading trail developers was utilised.

The outcomes included successful buy-in to the importance of lead and support trails, and agreement on which was which; community support and an understanding of the roles of the different trails; trail construction and management guidelines to assist the community; agreement to the commitment of funds to jointly invest in the priority trails; and a business case for investment.

Importantly, the project was implemented with the stakeholders continuing to work closely together on the agreed strategy. This included giving priority to a small number of iconic trails that could position the region, without being parochial. These would be priorities for investment, development and marketing within the bounds of expected resources.

These prioritised trails would become flagships for the region, form the core adventure trails and cycle tourism offering in the region and be used to attract private and public sector investment, and would offer the best opportunity for revenue generation.

- Great Ocean Walk
- Grampians Peaks Trail
- You Yangs MTB Trails
- Surf Coast Walk
- Forrest MTB Trails
- Twelve Apostles Trail
- Great South West Walk

With implementation of the proposed improvements and if the leading trails continued to attract existing and new visitors to the region, it was estimated that a 10% increase in visitor numbers could be achieved. This would result in an estimated \$24 million in direct visitor expenditure per annum in the region and 273 jobs. In addition, the flow-on effects as a result of indirect expenditure were expected to be greater.³³

The Barwon South West Adventure trail network is expected to deliver significant economic benefits to the Victorian community. With a 6 year investment of \$40 million, the trail network net upgrade is expected to deliver \$74.7 million in benefits over 10 years.³⁴



³³ TRC Tourism, Growing Adventure Tourism in Barwon South West Region, A Business Case for Investing in Regional Trails in Barwon South West Region, June 2015

³⁴ TRC Tourism, Growing Adventure Tourism in Barwon South West Region, A Business Case for Investing in Regional Trails in Barwon South West Region, June 2015

Te Araroa The Long Path, New Zealand



Lessons for C2C:

- Connection of networks with a range of trail managers / owners including national parks, council and recreational trails.
- Popularity in the end-to-end experience growing due to iconic status awareness – end of track Finishers Medal also offered
- Marketed as a walk for everyone
- Acts as a corridor to what New Zealand has to offer – culture, nature, history, local cuisine, accommodation & experiences
- One-stop-shop online service, also supports and promotes registered local businesses. Walkers register online.
- Managed by the Te Araroa Trust (TAT) – relies on donations, grants and volunteers to operate. No fee payment, however when walkers register, depending on the length of walk they are encouraged to donate a nominal fee for the continued upkeep and promotion of the walk.
- TAT has identified the issues and challenges in continued operations and are working through future planning to mitigate these issues.

Snapshot

The 3000 km route stretching from Cape Reinga in the North of New Zealand to Bluff in the South was officially opened December 3rd, 2011 - taking in spectacular New Zealand landscapes from beaches to volcanoes to forests to cities. The whole route normally takes 50-80 days per island (4 months).

Te Araroa's trails connect with Department of Conservation tracks, Council paths and beach walks to collectively form New Zealand's national walking trail.

During the 2018-2019 walking season (October-April) the number of people walking the entire length of the trail exceeded 1,100 for the first time. Hundreds of thousands more walked individual sections.

Marketing

Marketing efforts highlight that Te Araroa can be enjoyed as a fantastic day walk or as a series of multiday walks. The walk connects settlements, townships and cities. It's a corridor that encourages social and economic transactions en route – for marae stays and other cultural experiences, also food and accommodation. The track corridor showcases a wide variety of New Zealand experiences - natural, cultural, and historic.

The main website highlights the top 6 day walks and the top 6 multi-day walks. Online walkers can order the official Finishers Medal and the official Guidebook. Local business can register online as an accommodation provider.

In 2019 six of the Te Araroa trail's most spectacular and scenic locations were immortalised in a new series of postage stamps released by NZ Post.

Governance

Te Araroa Trust (TAT) is the guardian of the trail, responsible for developing, promoting and managing it.

The Trust relies on donations and grants to operate, and they encourage walkers to donate online e.g. they suggest a donation of NZ\$500pp for those walking the length of Te Araroa, NZ\$250 for those walking one island only and smaller amounts for more specific tracks/distances.

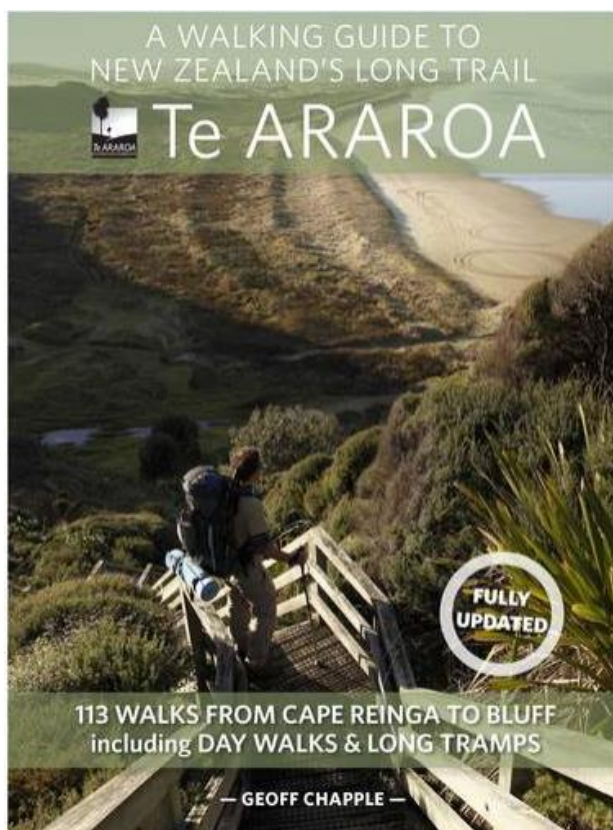
TAT and its eight regional trusts state that they have achieved what the official bodies could not. For years their organisation has had a hard battle for funds, and survival, and lately their success, is due to the many volunteers who have kept the dream alive and advancing.

The trust encourages walkers to register online, so they can track numbers.

Issues

Weakness identified by the TAT:

- No accurate data on the number of annual through and sectional walkers
- Lack of resources - \$ and staffing
- Infrastructure is at seasonal capacity
- Trail fragility – maintenance and land-use agreements
- Relationship with DoC – inconsistent, too few Regional Trusts – we require them each region
- Vision - lacks clarity
- Lack of recognition of the TAT by NZ Government compared to the NZ Cycle Trail
- Lack of champions



Maintenance

TAT are dependent on the support of their donors, sponsors and partners - agencies such as the Department of Conservation, New Zealand Transport Agency and New Zealand Walking Access Commission. Otherwise maintaining and sustaining the trail for the walking public to enjoy would not be possible. Unlike some NZ Trails Te Araroa does not get ongoing direct funding from Government.

The TAT will focus on the following over the next 3 years:

- Reduce road walking, improve amenities including accommodation, reduce critical hazards – including water crossing

Sustainability

- There is a need to plan and secure income streams.
- Generate income from government, corporate, philanthropic and community supporters, including walkers.
- Encourage local communities to participate in economic development from embracing Te Araroa.
- Work alongside a large and highly valued community of well-connected volunteers and stakeholders.
- Ensure clearly defined structures, roles, responsibilities, recognition at all levels.

Sources:

- www.teararoa.org.nz/faq/
- www.ausleisure.com.au/news/te-araroa-trail-celebrated-in-new-zealand-postage-stamp-series/

East Coast Trail Newfoundland, Canada



Lessons for C2C:

- Significant contribution to local communities through visitation and use of the trail (\$3.5M annually)
- Governance and trail management through the East Coast Trail Association (charitable entity). Funded through membership, donations and government grants – not an ongoing reliable source of resourcing and consideration of future trail governance and management is required
- Volunteers are important through promotion and advocacy of the trail, generating funds, sharing news and stories, trail representation, undertaking administrative and maintenance functions, developing policies and driving passion for the trail.
- Trail covers a mix of private and public land which also creates management issues.

SNAPSHOT

The East Coast Trail is a 300 km footpath along the meandering coastline of Newfoundland's Avalon

Peninsula, passing through 30 coastal communities. Split into 26 separate paths, each trail has distinctive topography, history, and surprises – colourful fishing villages, fjords, lighthouses, ecological areas, icebergs, a suspension bridge, and the first sunrise in North America.

There are over 14,000 visitors completing over 65,000 hikes a year on the trail.

Non-resident hikers contribute over \$3.5 million annually to the local communities along the trail, with tourism a critical revenue source.

GOVERNANCE

The East Coast Trail on Newfoundland's Avalon Peninsula is managed by the East Coast Trail Association. (ECTA)

The ECTA is a registered charity established to provide a wilderness hiking experience by developing and maintaining the East Coast Trail, promoting public access, minimizing its impact on the natural environment and protecting it for future generations. The long term sustainability of the trail is not a challenge that can be solved by the East Coast Trail Association alone. The trail covers private land and public land. Ensuring its sustainability is a complex and demanding legal challenge for a small charitable organization. The association has membership levels starting at \$25 and asks for donations.

Investments by the Government of Canada and the Government of Newfoundland and Labrador (\$1.2million) in the East Coast Trail Association (ECTA) will help to further support trail upgrades and generate 60 weeks of employment for 18 trail crew.

ISSUES

The ECTA have identified five strategic challenges that are critical to long-term success: communications, funding, trail management, volunteerism and governance. The effective resolution of these challenges is conditional on the engagement and active involvement of stakeholders in the management of the trail.

Marketing and Communications

Two critical goals for the East Coast Trail are funding to sustain the trail and delivery on its mandate and mission. Not-for-profit, charitable organizations like the East Coast Trail cannot accomplish their missions effectively or attract funding and resources without the support and commitment of many stakeholders. Marketing and communications provide a road map and tools to develop and build that engagement, support and commitment.

The issue cited most often in the membership survey, volunteer focus groups and other stakeholder consultations was the need for improved, regular and sustained communications and marketing efforts. Members value engagement and information about the trail and the work of the association and its board.

Financial Resources for Long-Term Sustainability

Like many other charitable, not-for-profit organizations, the East Coast Trail Association is struggling to find the financial resources required to carry out its mission. The Trail has a reputation for an outstanding coastal hiking trail and received international recognition as one of the 10 best adventure destinations in the world. The trail is now a critical aspect of the province's tourism infrastructure.

However, the current funding model cannot sustain the existing 265 km of developed paths from Cape St. Francis to Cappahayden. They need to secure funding for the long term in order to ensure that the ongoing management and operation of the trail remains financially sustainable.

Maintenance, Enhancement and Protection

It is vital, though increasingly difficult, to keep pace with the current demand to meet hiker expectations and keep the trail in a safe condition. Extreme weather events erode coastline paths and knock down thousands of trees that need clearing each year. Ensuring that the trail and its environment are protected is critical to maintaining the trail's wilderness hiking experience for tourists and residents alike.

Volunteerism

Volunteers give stamina to the East Coast Trail Association. They develop policies and standards, monitor trail conditions, plan trail operations, slash brush, edit newsletters, update the website, monitor social media accounts, publish maps and guidebooks, lead guided hikes, raise funds, support administration, advocate in municipal land-use planning, provide legal guidance, attend public events, give direction, participate in committees and promote the association in numerous ways. Volunteers are passionate friends of the trail and are essential to its success.

Governance and Structure

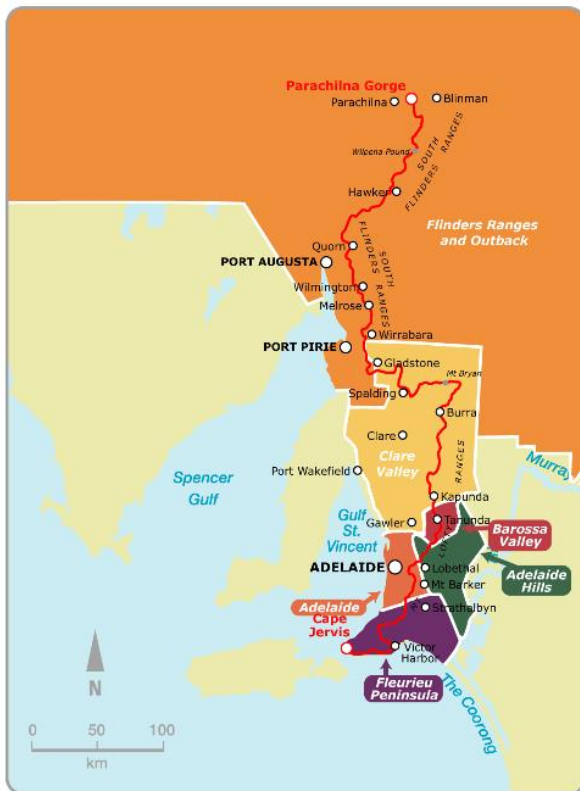
The association is based on a governance structure that was implemented in 1994. Though enhanced over the years, challenges remain. The trail maintenance program is struggling to meet the demands of a 265-km trail; the work demands placed on our core volunteer committees cannot be supported over the long term.

Changes to governance are required to manage these challenges effectively and to sustain the trail. An improved governance model will include policies, decision-making processes, systems and organizational structures that enhance the support needed to manage the association.

Sources:

- www.macsadventure.com/holiday-2421/hiking-newfoundlands-east-coast-trail#
- www.eastcoasttrail.com/en/choose-your-path/points-of-interest.aspx
- www.newfoundlandlabrador.com/things-to-do/hiking-and-walking
- www.canada.ca/en/atlantic-canada-opportunities/news/2017/05/east_coast_trailassociationreceivesgovernmentfunding.html
- www.ectthruhike.com/

The Heysen Trail



Lessons for C2C:

- Seasonal access only (April – October, extreme heat impacted)
- Trail passes through national parks, public roads and trails, local council areas and private land
- Governance and management is a partnership between Friends of Heysen Trail, Department for Environment and Water, volunteer walking clubs, landholders and other individuals.
- Clear Governance objectives established, each section of the walk has a 'leader' who is responsible for undertaking respective management roles for that section.
- One-stop-online shop sharing articles, itineraries, selling merchandise and maps
- Recent Government funding commitment (\$6M) for trail improvements.

SNAPSHOT

The Heysen Trail is a long distance walking trail in South Australia. It runs from Parachilna Gorge, in the Flinders Ranges via the Adelaide Hills to Cape Jervis on the Fleurieu Peninsula and is approximately 1,200 kilometres in length. Open April to October each year, the Trail passes through:

- National Parks, Conservation Parks and Reserves
- Public roads and road reserves (unmade roads) through local council areas
- Private land
- Forests

GOVERNANCE

The Trail is managed and maintained by a partnership between:

- the volunteers of the Friends of the Heysen Trail
- the Department for Environment & Water (DEW)
- a number of volunteer walking clubs, landholders and individuals.

The Friends of the Heysen Trail is a volunteer organisation dedicated to the promotion and maintenance of the Heysen Trail. Online, there is an extensive list of members of the group, online shop selling maps and clothing, online articles and updates. The objectives of the group are:

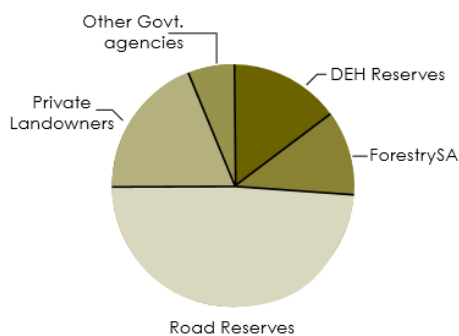
- to promote public awareness and usage of the Heysen Trail and other walking trails in South Australia
- to assist and advise in the development and maintenance of walking trails in South Australia
- to ensure the rights and interests of recreational walkers are preserved and that access to walking trails and other walking areas are protected
- to promote awareness of environmental responsibilities on and adjacent to walking trails

- to make representations and submissions to appropriate Government, semi-Government and non-Government organisations on any matters concerning recreational walkers and walking trails

GOVERNMENT

In the June 2019 State (SA) Budget \$6M was allocated for enhancements to the Heysen Trail and Deep Creek Conservation Park over the next three to four years.

Heysen Trail Land Tenure



MAINTENANCE

The organisation depends on walkers for information and comments on the condition of and safety concerns along the trail. The trail is broken down into sections, and each section has an identified leader who is responsible for that area, for example:

Promoting the Trail

- Developing and implementing a marketing plan
- Incorporating the trail into state, national and international tourism promotions and publications.

Broaden the Variety of Experiences available on the Trail to Encourage Increased use by a Wider Range of People

- Developing strategic sections of the trail
- Developing trail links to nearby towns; encourage tourism operators to develop packages providing accommodation and transfers.

Ensure a High Standard of Trail Management

- Developing a management plan that addresses route, standards and facilities
- Developing annual operating plans for maintenance
- Enhancing interpretation of Aboriginal and European culture.

Increase the Support Base

- Strengthening partnerships between land owners, the Friends of the Heysen Trail and Parks
- Improving engagement with Local and State Governments
- Exploring options for a high level stakeholder group to guide management of the trail.

Pursue Resources for Development, Management and Promotion

- Expanding the range of funding sources for priority works.

Sources: <https://heysentrail.asn.au/heysen-trail/>

www.environment.sa.gov.au/files/sharedassets/parks/heysentrail_plan

APPENDIX G – LANDSCAPE VISUAL ZONES

Leeuwin – Naturaliste Management Plan 2015

The Leeuwin – Naturaliste Management Plan 2015 is the framework for protecting the Park’s natural and cultural values, while continuing to be regarded as one of the primary coastal recreation and tourism destinations in Western Australia, making a significant contribution to the regional economy. Specific actions relevant to this study include:

- allow for and encourage sustainable nature-based visitor activities where they do not compromise natural, cultural or heritage values
- engage with the community to encourage a sense of community ownership of the planning area and ensure support for the management objectives and strategies in this plan
- maintain and enhance the trail network to provide a range of bushwalking experiences while not adversely impacting on key values.
- Maintain the network of walk trails indicated and develop these to the class indicated. Inappropriately located or unauthorised walk trails will be relocated, or closed and rehabilitated.
- Liaise with local government and the Friends of the Cape to Cape Track to ensure complementary management of the track where it traverses other tenures.
- Ensure the more remote southern sections of the Cape to Cape Track have minimal infrastructure.
- Develop and implement a strategic plan for the Cape to Cape Track.
- Provide appropriately designed camping opportunities that minimise environmental and other impacts and conflicts between users.
- Extend the range of services and recreational experiences available through the involvement of private enterprise and ensure that commercial tourism activities are compatible with other management objectives.
- Evaluate proposals for licences and commercial tourism leases according to departmental policy.

The Management Plan identifies Visual Landscape Management Zones that “take into account visual landscape qualities, the level of visibility or seen area and public sensitivity” (Appendix G). The majority of the Cape to Cape Track runs through Zone / Class A of this classification meaning these locations reflect “a landscape rich in naturalness, diversity, components of high visual quality and areas with high levels of public use and sensitivity”. Because of the sensitivity of visual landscapes along the Leeuwin-Naturaliste Ridge, the Management Plan currently requires any proposed development within this Zone be assessed for impacts on the visual landscape. The purpose of Zone A is to protect and enhance visual landscape values within this defined area.

Leeuwin-Naturaliste Sub-Regional Strategy – May 2019

The Leeuwin - Naturaliste Sub Regional strategy seeks to provide direction and guidance to address the constraints of the area by seeking to balance economic, social and environmental considerations, rather than taking a solely conservationist approach.

- **Landscapes** - The unique landscapes of the sub-region are inherently linked to the desirability and liveability of the area, and provide a significant enabler, attracting investment and income from tourism and agriculture, and creating an attractive place to live, work, visit and play (p. 39).
- **Tourism** - To support tourism in the sub-region it is necessary to:
 - protect and maintain the environment, particularly the coast, forests and regional or national parks
 - provide complementary tourism accommodation options throughout the sub-region
 - maintain significant cultural heritage assets, walking and bicycle trails
 - provide complementary tourism attractions with agricultural pursuits within rural land.

Many of the sub-region's natural assets have little on-site management and therefore access to these areas may not be controlled or generate a direct income to reinvest back into its ongoing maintenance. To maintain the sub-region as a tourism destination a range of accommodation types, ranging from campsites through to 5-star hotels, need to be supported and maintained to suit different visitor budgets (p. 46).

State Planning Policy - Section 6.1 Leeuwin-Naturaliste Ridge

State Planning Policy 6.1 Leeuwin-Naturaliste Ridge Statement of intent:

“extraordinary landscape which is part of the nation's heritage. Its unique values will be conserved by land use strategies and development assessment processes, having particular regard for:

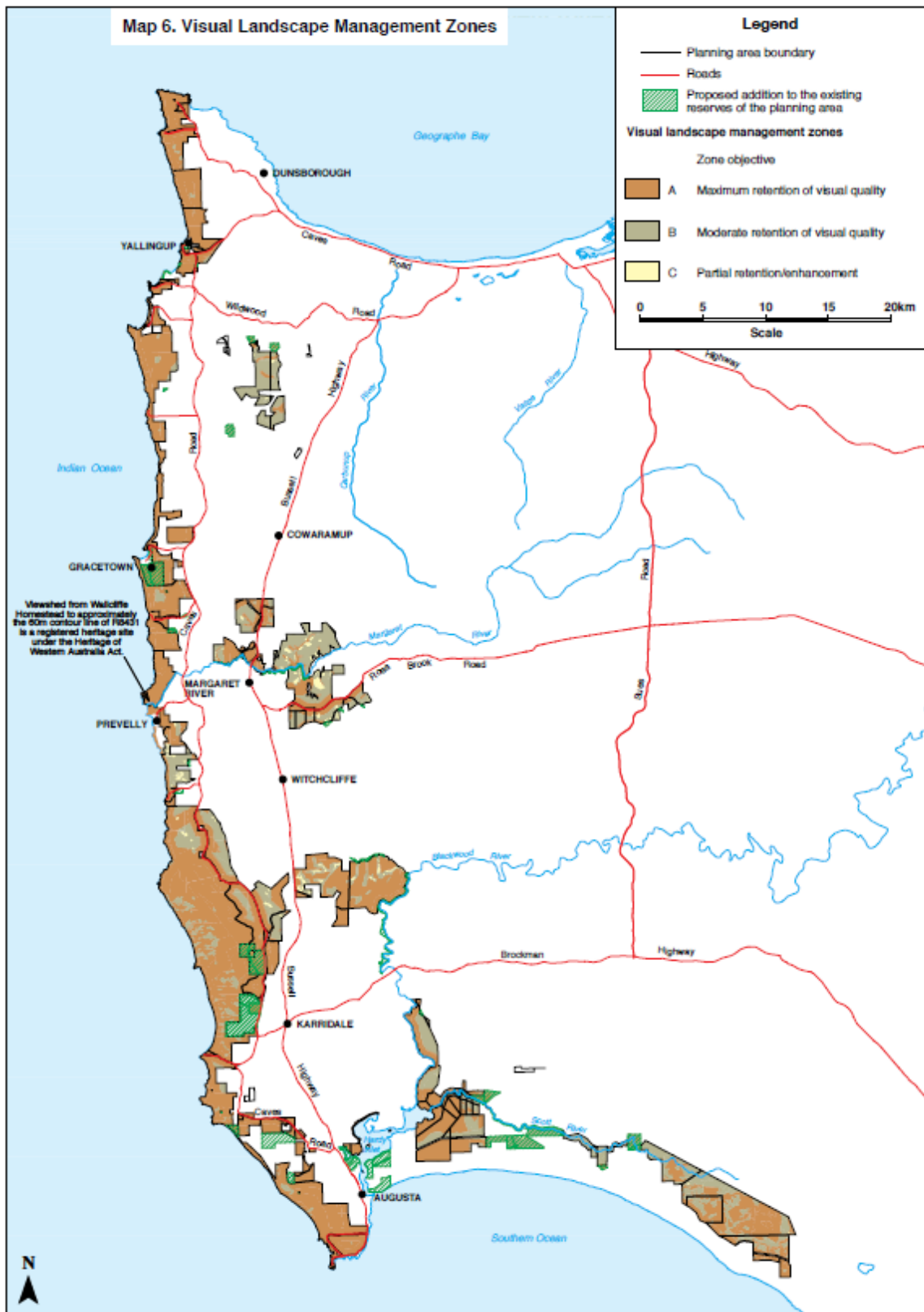
- Protection of the natural character of the Leeuwin-Naturaliste Ridge, including the coastal and marine interfaces and areas of remnant vegetation.
- Maintenance of the mosaic of land uses evident in existing agricultural areas, while providing for change in agricultural land uses, and
- Recognition of the role and importance of human activity and its contribution to cultural landscape.”

Section 4.5 Tourism Statement of Intent states:

“A diverse and sustainable tourism base which complements the existing character and lifestyle of the policy area will be facilitated by:

- Encouraging nature-based and cultural tourism opportunities
- Focusing coastal tourism in designated nodes
- Integrating large-scale tourist development into Principal Centres and other settlements
- Promoting low-scale tourist development that is consistent with local characteristics
- Encouraging innovative tourism development that responds to the local natural and cultural environment
- Assessing land use proposals for their impact on tourism
- Conserving those landscape, cultural and environmental values that offer future tourism potential.”

Leeuin-Naturaliste capes area parks and reserves management plan



Sites of historical and Aboriginal heritage significance³⁵



³⁵ Leeuwin – Naturaliste Sub-regional Strategy 2019

Sites of natural importance³⁶



Land zoning / planning areas

³⁶ Leeuwin – Naturaliste Sub-regional Strategy 2019

APPENDIX H – C2C ON TRAIL ACCOMMODATION VIABILITY MODELLING

Estimated Trail Users & On Trail Accommodation Use – Scenario 1 (5% growth)

Cape to Cape Trail	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10
Scenario 1 - 5% growth per year										
Day Walkers	14,000	14,700	15,435	16,207	17,017	17,868	18,761	19,699	20,684	21,719
Overnight Walks										
2-day walks 1-night accom (5%)	1,000	1,050	1,103	1,158	1,216	1,276	1,340	1,407	1,477	1,551
4-day walks 3-night accom (4%)	3,500	3,675	3,859	4,052	4,254	4,467	4,690	4,925	5,171	5,430
8-day walks 7 nights accom (3%)	1,500	1,575	1,654	1,736	1,823	1,914	2,010	2,111	2,216	2,327
Total Overnight Walks	6,000	6,300	6,615	6,946	7,293	7,658	8,041	8,443	8,865	9,308
Total All Walkers	20,000	21,000	22,050	23,153	24,310	25,526	26,802	28,142	29,549	31,027
Overnight Walks (On Trail Accom)										
2-day walks = 1-night accom (50%)	500	525	551	579	608	638	670	704	739	776
4-day walks = 3-night accom (50%)	1,750	1,838	1,929	2,026	2,127	2,233	2,345	2,462	2,586	2,715
8-day walks = 7 nights accom (67%)	1,005	1,055	1,108	1,163	1,222	1,283	1,347	1,414	1,485	1,559
Total On Trail Accom	3,255	3,418	3,589	3,768	3,956	4,154	4,362	4,580	4,809	5,050
Overnight Walks (On Trail Accom nights)										
Basic & Moderate										
2-day walks = 1-night accom	500	525	551	579	608	638	670	704	739	776
4-day walks = 3-night accom	5,250	5,513	5,788	6,078	6,381	6,700	7,036	7,387	7,757	8,144
8-day walks = 7 nights accom	7,035	7,387	7,756	8,144	8,551	8,979	9,428	9,899	10,394	10,914
Total On Trail Accom (Nights)	12,785	13,424	14,095	14,800	15,540	16,317	17,133	17,990	18,889	19,834
Upmarket (3 sites)										
Overnight Walks (On Trail Accom) - nights										
2-day walks = 1-night accom	500	525	551	579	608	638	670	704	739	776
4-day walks = 3-night accom	5,250	5,513	5,788	6,078	6,381	6,700	7,036	7,387	7,757	8,144
8-day walks = 7 nights accom	-	-	-	-	-	-	-	-	-	-
Total Upmarket (only 1 day & 3 day)	5,750	6,038	6,339	6,656	6,989	7,339	7,706	8,091	8,495	8,920

Source: TRC Modelling & Estimates

Estimated Trail Users & On Trail Accommodation Use – Scenario 2 (7.5% Growth)

Cape to Cape Trail	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10
Scenario 2 - 7.5% growth										
Day Walkers	14,000	15,050	16,179	17,392	18,697	20,099	21,606	23,227	24,969	26,841
Overnight Walks										
2-day walks										
1-night accom (5%)	1,000	1,075	1,156	1,242	1,335	1,436	1,543	1,659	1,783	1,917
4-day walks										
3-night accom (4%)	3,500	3,763	4,045	4,348	4,674	5,025	5,402	5,807	6,242	6,554
8-day walks										
7 nights accom (3%)	1,500	1,613	1,733	1,863	2,003	2,153	2,315	2,489	2,675	2,876
Total Overnight Walks	6,000	6,450	6,934	7,454	8,013	8,614	9,260	9,954	10,701	11,347
Total All Walkers	20,000	21,500	23,113	24,846	26,709	28,713	30,866	33,181	35,670	38,189
Overnight Walks (On Trail Accom)										
2-day walks = 1-night accom (50%)	500	538	578	621	668	718	772	830	892	959
4-day walks = 3-night accom (50%)	1,750	1,881	2,022	2,174	2,337	2,512	2,701	2,903	3,121	3,277
8-day walks = 7 nights accom (67%)	1,005	1,080	1,161	1,249	1,342	1,443	1,551	1,667	1,792	1,927
Total On Trail Accom	3,255	3,499	3,762	4,044	4,347	4,673	5,023	5,400	5,805	6,163
Overnight Walks (On Trail Accom nights)										
Basic & Moderate										
2-day walks = 1-night accom	500	538	578	621	668	718	772	830	892	959
4-day walks = 3-night accom	5,250	5,644	6,067	6,522	7,011	7,537	8,102	8,710	9,363	9,831
8-day walks = 7 nights accom	7,035	7,563	8,130	8,740	9,395	10,100	10,857	11,671	12,547	13,488
Total On Trail Accom (Nights)	12,785	13,744	14,775	15,883	17,074	18,355	19,731	21,211	22,802	24,278
Upmarket (3 sites)										
Overnight Walks (On Trail Accom) - nights										
2-day walks = 1-night accom	500	538	578	621	668	718	772	830	892	959
4-day walks = 3-night accom	5,250	5,644	6,067	6,522	7,011	7,537	8,102	8,710	9,363	9,831
8-day walks = 7- nights accom	-	-	-	-	-	-	-	-	-	-
Total Upmarket (only 1 day & 3 day)	5,750	6,181	6,645	7,143	7,679	8,255	8,874	9,540	10,255	10,790

Source: TRC Modelling & Estimates

Estimated Trail Users & On Trail Accommodation Use – Scenario 2 (12.5% Growth)

Cape to Cape Trail	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10
Scenario 3 - 12.5% growth										
Day Walkers	14,000	15,750	16,931	18,201	19,566	21,034	22,611	24,307	26,130	28,090
Overnight Walks										
2-day walks										
1-night accom (5%)	1,000	1,125	1,266	1,424	1,602	1,802	2,027	2,281	2,566	2,887
4-day walks										
3-night accom (4%)	3,500	3,938	4,430	4,983	5,606	6,307	7,096	7,982	8,980	10,103
8-day walks										
7 nights accom (3%)	1,500	1,688	1,898	2,136	2,403	2,703	3,041	3,421	3,849	4,330
Total Overnight Walks	6,000	6,750	7,594	8,543	9,611	10,812	12,164	13,684	15,395	17,319
Total All Walkers	20,000	22,500	24,525	26,744	29,177	31,846	34,775	37,991	41,525	45,409
Overnight Walks (On Trail Accom)										
2-day walks = 1 night accom (50%)	500	563	633	712	801	901	1,014	1,140	1,283	1,443
4-day walks = 3 night accom (50%)	1,750	1,969	2,215	2,492	2,803	3,154	3,548	3,991	4,490	5,051
8-day walks = 7 nights accom (67%)	1,005	1,131	1,272	1,431	1,610	1,811	2,037	2,292	2,579	2,901
Total On Trail Accom	3,255	3,662	4,120	4,635	5,214	5,866	6,599	7,424	8,352	9,396
Overnight Walks (On Trail Accom nights)										
Basic & Moderate (7 sites)										
2-day walks = 1 night accom	500	563	633	712	801	901	1,014	1,140	1,283	1,443
4-day walks = 3 night accom	5,250	5,906	6,645	7,475	8,409	9,461	10,643	11,974	13,470	15,154
8-day walks = 7 nights accom	7,035	7,914	8,904	10,017	11,269	12,677	14,262	16,045	18,050	20,307
Total On Trail Accom (Nights)	12,785	14,383	16,181	18,204	20,479	23,039	25,919	29,159	32,804	36,904
Overnight Walks (On Trail Accom) - nights										
Upmarket (3 sites)										
2-day walks = 1-night accom	500	563	633	712	801	901	1,014	1,140	1,283	1,443
4-day walks = 3 night accom	5,250	5,906	6,645	7,475	8,409	9,461	10,643	11,974	13,470	15,154
8-day walks = 7 nights accom	-	-	-	-	-	-	-	-	-	-
Total Upmarket (only 1 night & 3 nights)	5,750	6,469	7,277	8,187	9,210	10,362	11,657	13,114	14,753	16,597

Source: TRC Modelling & Estimates

Financial Analysis Budget and Moderate Accommodation

This section provides an indicative high-level analysis of revenue and major costs associated with operations for each of the accommodation options and growth scenarios. As part of a feasibility study, a full financial analysis would need to be undertaken for each option.

Revenue

The following table shows revenue estimates which are based on the estimated users (from section 2) for each scenario and accommodation option.

Estimated Revenue – Accommodation Options & Scenarios (constant prices 2020)

Options	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10
Scenario 1: Revenue (5.0% Growth)										
Budget Style Accommodation -7 sites (\$11)	\$140,635	\$147,667	\$155,050	\$162,803	\$170,943	\$179,490	\$188,464	\$197,888	\$207,782	\$218,171
Moderate Level Accommodation- 7 sites (\$25)	\$319,625	\$335,606	\$352,387	\$370,006	\$388,506	\$407,931	\$428,328	\$449,744	\$472,232	\$495,843
Scenario 2: Revenue (7.5% Growth)										
Budget Style Accommodation -7 sites (\$11)	\$140,635	\$151,183	\$162,521	\$174,710	\$187,814	\$201,900	\$217,042	\$233,320	\$250,819	\$267,056
Moderate Level Accommodation- 7 sites (\$25)	\$319,625	\$343,597	\$369,367	\$397,069	\$426,849	\$458,863	\$493,278	\$530,274	\$570,044	\$606,945
Scenario 3: Revenue (12.5% growth)										
Budget Style Accommodation -7 sites (\$11)	\$140,635	\$158,214	\$177,991	\$200,240	\$225,270	\$253,429	\$285,107	\$320,746	\$360,839	\$405,944
Moderate Level Accommodation- 7 sites (\$25)	\$319,625	\$359,578	\$404,525	\$455,091	\$511,977	\$575,975	\$647,971	\$728,968	\$820,089	\$922,600

source: TRC Modelling & Estimates

Operations Costs

The following are the cost assumptions used in the indicative analysis of operational financials.

Accommodation Options	Operations Assumptions
Budget Style Accommodation (\$11 pp/n)	Staff No staff – Rangers visit sites to clean/maintain. Annual Maintenance cost -3% of capital cost = \$52,500 (7 sites)
Moderate Level Accommodation (\$25 pp/n)	Staff 1 site manager: Salary \$70,000 (incl super) x 7 sites = \$490,000 Annual Maintenance cost - 3% of capital cost = \$157,500 (7 sites)
Upmarket Accommodation (\$250 pp/n – room only)	Staff 1 site manager Salary \$75,000 (incl super) x 3 = \$225,000 1 cook Salary \$65,000 (incl super) X 3 =\$195,000 Annual Maintenance cost - 3% of capital cost = \$357,000 (3 sites) Site lease: 7.5% of gross revenue (rent holiday years 1-3)

Source: TRC Assumptions

Financial Comparisons

The following tables show 10-year revenue, expenses, and operating result for the each of the accommodation options. It is an indicative analysis showing operating results, to determine potential viability of the accommodation options. The operating result for each is EBDITA (Earnings before depreciation, interest, tax, and amortisation). A full financial analysis would need to be undertaken as part of a detailed feasibility study and business case.

Budget Style Accommodation

This option delivers an operating surplus under all of the scenarios. There is no staffing of the sites in this option, with servicing done by ranger visits. For example, for Scenario 1 (5% annual growth in users), the operating surplus increase from \$88,135 in year 1 to \$165,671 in year 10.

Budget Style Accommodation - Revenue & Expenses & Operating result (constant prices \$2020)

Budget Style Accommodation (7 Sites)	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10
Revenue (\$11/p/n)										
Scenario 1 (growth 5% pa)	\$140,635	\$147,667	\$155,050	\$162,803	\$170,943	\$179,490	\$188,464	\$197,888	\$207,782	\$218,171
Scenario 2 (growth 7.5% pa)	\$140,635	\$151,183	\$162,521	\$174,710	\$187,814	\$201,900	\$217,042	\$233,320	\$250,819	\$267,056
Scenario 3 (growth 12.5% pa)	\$140,635	\$158,214	\$177,991	\$200,240	\$225,270	\$253,429	\$285,107	\$320,746	\$360,839	\$405,944
Operating Costs										
Annual Maintenance cost -3% of capital cost = \$52,500 (7 sites)	\$52,500	\$52,500	\$52,500	\$52,500	\$52,500	\$52,500	\$52,500	\$52,500	\$52,500	\$52,500
Net Operating Result (EBDITA)										
Scenario 1 (growth 5% pa)	\$88,135	\$95,167	\$102,550	\$110,303	\$118,443	\$126,990	\$135,964	\$145,388	\$155,282	\$165,671
Scenario 2 (growth 7.5% pa)	\$88,135	\$98,683	\$110,021	\$122,210	\$135,314	\$149,400	\$164,542	\$180,820	\$198,319	\$214,556
Scenario 3 (growth 12.5% pa)	\$88,135	\$105,714	\$125,491	\$147,740	\$172,770	\$200,929	\$232,607	\$268,246	\$308,339	\$353,444

Source: TRC Modelling & Estimates. Note: EBDITA Earnings before depreciation, interest, tax, and amortisation.

Moderate Level Accommodation

This option delivers major operating losses under all of the scenarios. This is due to each of the 7 sites being staffed (onsite manager). For example, for Scenario 1 (5% annual growth in users), the operating losses are \$327,875 in year 1 and \$151,657 in year 10. Only Scenario 3 produces operating surpluses from Year 7 onwards.

Moderate Level Accommodation - Revenue & Expenses & Operating result (constant prices \$2020)

Moderate Level Accommodation (7 Sites)	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10
Revenue (\$25/p/n)										
Scenario 1 (growth 5% pa)	\$319,625	\$335,606	\$352,387	\$370,006	\$388,506	\$407,931	\$428,328	\$449,744	\$472,232	\$495,843
Scenario 2 (growth 7.5% pa)	\$319,625	\$343,597	\$369,367	\$397,069	\$426,849	\$458,863	\$493,278	\$530,274	\$570,044	\$606,945
Scenario 3 (growth 12.5% pa)	\$319,625	\$359,578	\$404,525	\$455,091	\$511,977	\$575,975	\$647,971	\$728,968	\$820,089	\$922,600
Operating Costs										
1 site manager: Salary \$70,000 (incl super) x 7 = \$490,000	\$490,000	\$490,000	\$490,000	\$490,000	\$490,000	\$490,000	\$490,000	\$490,000	\$490,000	\$490,000
Annual Maintenance cost - 3% of capital cost = \$157,500 (7 sites)	\$157,500	\$157,500	\$157,500	\$157,500	\$157,500	\$157,500	\$157,500	\$157,500	\$157,500	\$157,500
Total Operating Costs	\$647,500	\$647,500	\$647,500	\$647,500	\$647,500	\$647,500	\$647,500	\$647,500	\$647,500	\$647,500
Net Operating Result (EBDITA)										
Scenario 1 (growth 5% pa)	-\$327,875	-\$311,894	-\$295,113	-\$277,494	-\$258,994	-\$239,569	-\$219,172	-\$197,756	-\$175,268	-\$151,657
Scenario 2 (growth 7.5% pa)	-\$327,875	-\$303,903	-\$278,133	-\$250,431	-\$220,651	-\$188,637	-\$154,222	-\$117,226	-\$77,456	-\$40,555
Scenario 3 (growth 12.5% pa)	-\$327,875	-\$287,922	-\$242,975	-\$192,409	-\$135,523	-\$71,525	\$471	\$81,468	\$172,589	\$275,100

Source: TRC Modelling & Estimates. Note: EBDITA Earnings before depreciation, interest, tax, and amortisation.

Upmarket Accommodation

The option would have a private operator. With the pricing at \$250 per night and the estimated user numbers, operating surpluses are delivered in each year under each of the scenarios (100%, 75% and 50% occupancy). For example, at 100% occupancy, the net result increases from \$192,500 in year 1 to \$442,613 in year 10.

However, the operations may not be viable for a private operator.

- The results are EBDITA Earnings before depreciation, interest, tax, and amortisation. The profit and loss (P&L) would be impacted by the funding structure for the venture – the amount of equity and the loans to finance the development of the three facilities. Interest would be a major cost element.
- There is a significant risk factor associated special purpose accommodation on the track. The facilities are geared to a single visitor market – walkers. Financial results are dependent on achieving significant growth in numbers of overnight stays over the 10-year period. Annual numbers could be impacted by adverse weather conditions.
- With the combination of these financial and risk factors, a private developer/operator would be unlikely to invest in on-trail accommodation.

As part of a feasibility assessment and business case a full financial analysis (including all costs, including interest) would need to be undertaken.

Upmarket Accommodation - Revenue & Expenses & Operating result (constant prices 2020)

The following shows a 10-year cash flow analysis for a facility based on 100% occupancy at \$250 per person/per night. The ROI for the 10-year period is +70.3%.

100% OCCUPANCY											
SINGLE SITE UPMARKET ACCOMMODATION	Constant \$2020 prices										
\$250 per night	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10	Total
Cash Inflows											
Revenue	\$720,000	\$720,000	\$720,000	\$720,000	\$720,000	\$720,000	\$720,000	\$720,000	\$720,000	\$720,000	\$7,200,000
Cash Outflows											
Asset Cost	\$2,000,000										\$2,000,000
Salaries (Manager)	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000	\$750,000
Interest on Loan	Assumes 100% equity invest										\$0
Site lease	0	0	0	\$54,000	\$54,000	\$54,000	\$54,000	\$54,000	\$54,000	\$54,000	\$378,000
Maintenance	\$60,000	\$60,000	\$60,000	\$60,000	\$60,000	\$60,000	\$60,000	\$60,000	\$60,000	\$60,000	\$600,000
Other Costs	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$500,000
Total Cash Outflows	\$2,185,000	\$185,000	\$185,000	\$239,000	\$239,000	\$239,000	\$239,000	\$239,000	\$239,000	\$239,000	\$4,228,000
(total investment cost)											
Net Result	-\$1,465,000	\$535,000	\$535,000	\$481,000	\$481,000	\$481,000	\$481,000	\$481,000	\$481,000	\$481,000	\$2,972,000
ROI											+70.3%

The following shows a 10-year cash flow analysis for a facility based on 75% occupancy and \$250 per person/per night. The ROI for the 10-year period is +30.6%.

75% OCCUPANCY											
SINGLE SITE UPMARKET ACCOMMODATION	Constant \$2020 prices										
\$250 per night	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10	Total
Cash Inflows											
Revenue	\$540,000	\$540,000	\$540,000	\$540,000	\$540,000	\$540,000	\$540,000	\$540,000	\$540,000	\$540,000	\$5,400,000
Cash Outflows											
Asset Cost	\$2,000,000										\$2,000,000
Salaries (Manager)	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000	\$750,000
Interest on Loan	Assumes 100% equity invest										\$0
Site lease	0	0	0	\$40,500	\$40,500	\$40,500	\$40,500	\$40,500	\$40,500	\$40,500	\$283,500
Maintenance	\$60,000	\$60,000	\$60,000	\$60,000	\$60,000	\$60,000	\$60,000	\$60,000	\$60,000	\$60,000	\$600,000
Other Costs	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$500,000
Total Cash Outflows	\$2,185,000	\$185,000	\$185,000	\$225,500	\$225,500	\$225,500	\$225,500	\$225,500	\$225,500	\$225,500	\$4,133,500
(total investment cost)											
Net Result	-\$1,645,000	\$355,000	\$355,000	\$314,500	\$314,500	\$314,500	\$314,500	\$314,500	\$314,500	\$314,500	\$1,266,500
ROI											+30.6%

The following shows a 10-year cash flow analysis for a facility based on 50% occupancy and \$250 per person/per night. The ROI for the 10-year period is negative **-10.9%**.

50% OCCUPANCY												
SINGLE SITE UPMARKET ACCOMMODATION	Constant \$2020 prices											
	\$250 per night	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10	Total
Cash Inflows												
Revenue	\$360,000	\$360,000	\$360,000	\$360,000	\$360,000	\$360,000	\$360,000	\$360,000	\$360,000	\$360,000	\$360,000	\$3,600,000
Cash Outflows												
Asset Cost	\$2,000,000											\$2,000,000
Salaries (Manager)	\$75,000	75,000	75,000	75,000	75,000	75,000	75,000	75,000	75,000	75,000	75,000	\$750,000
Interest on Loan	Assumes 100% equity invest											\$0
Site lease	0	0	0	\$27,000	\$27,000	\$27,000	\$27,000	\$27,000	\$27,000	\$27,000	\$27,000	\$189,000
Maintenance	\$60,000	\$60,000	\$60,000	\$60,000	\$60,000	\$60,000	\$60,000	\$60,000	\$60,000	\$60,000	\$60,000	\$600,000
Other Costs	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$500,000
Total Cash Outflows	\$2,185,000	\$185,000	\$185,000	\$212,000	\$212,000	\$212,000	\$212,000	\$212,000	\$212,000	\$212,000	\$212,000	\$4,039,000
(total investment cost)												
Net Result	-\$1,825,000	\$175,000	\$175,000	\$148,000	\$148,000	\$148,000	\$148,000	\$148,000	\$148,000	\$148,000	\$148,000	-\$439,000
ROI												-10.9%

For comparison – Moderate level accommodation with no on-site staff

This option delivers major operating surpluses under all of the scenarios. This is due no staffing at each of 7 proposed sites. For example, for Scenario 1 (5% annual growth in users), the operating surpluses are \$162,125 in year 1 and \$338,343 in year 10.

Moderate Level Accommodation - Revenue & Expenses & Operating result (constant prices \$2020)

Moderate Level Accommodation (7 Sites)	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10
Revenue (\$25/p/n)										
Scenario 1 (growth 5% pa)	\$319,625	\$335,606	\$352,387	\$370,006	\$388,506	\$407,931	\$428,328	\$449,744	\$472,232	\$495,843
Scenario 2 (growth 7.5% pa)	\$319,625	\$343,597	\$369,367	\$397,069	\$426,849	\$458,863	\$493,278	\$530,274	\$570,044	\$606,945
Scenario 3 (growth 12.5% pa)	\$319,625	\$359,578	\$404,525	\$455,091	\$511,977	\$575,975	\$647,971	\$728,968	\$820,089	\$922,600
Operating Costs										
No Staff	0	0	0	0	0	0	0	0	0	0
Annual Maintenance cost - 3% of capital cost = \$157,500 (7 sites)	\$157,500	\$157,500	\$157,500	\$157,500	\$157,500	\$157,500	\$157,500	\$157,500	\$157,500	\$157,500
Total Operating Costs	\$157,500	\$157,500	\$157,500	\$157,500	\$157,500	\$157,500	\$157,500	\$157,500	\$157,500	\$157,500
Net Operating Result (EBDITA)										
Scenario 1 (growth 5% pa)	\$162,125	\$178,106	\$194,887	\$212,506	\$231,006	\$250,431	\$270,828	\$292,244	\$314,732	\$338,343
Scenario 2 (growth 7.5% pa)	\$162,125	\$186,097	\$211,867	\$239,569	\$269,349	\$301,363	\$335,778	\$372,774	\$412,544	\$449,445
Scenario 3 (growth 12.5% pa)	\$162,125	\$202,078	\$247,025	\$297,591	\$354,477	\$418,475	\$490,471	\$571,468	\$662,589	\$765,100

Source: TRC Modelling & Estimates. Note: EBDITA Earnings before depreciation, interest, tax, and amortisation.

APPENDIX I – FUTURE TRACK PRIORITIES

This Study has presented a broad overview of not just the potential of eco-accommodation on the C2C, but also a range of other needs and considerations that will impact any future track accommodation.

As per previous and current planning documentation (Cape to Cape Strategic Plan 2014 – 2017, Western Australia Strategic Trails Blueprint 2017-2021) several actions are required to support an enhanced C2C experience:

	Action	Priority
Update / audit implementation of Cape to Cape Strategic Plan 2014 – 2017	Future Track realignments undertaken according to sustainability principles in this fragile terrain. Provide a balance of different experiences such as beach, dunes, slopes, ridges, remoteness and mature forest.	High A physical track assessment and evaluation is required to identify any track realignment, upgrades and stabilisation requirements
	Multi-use - some sections may be shared with horses, motorbikes, vehicles and bicycles.	High The physical track assessment can also evaluate the potential of shared track use, benchmark against other shared track use experiences and measure likely impacts to visitor enjoyment, the community (economic and social) and the track's environmental and cultural values.
	MOU exists between DPAW and Friends of C2C	High Is the MOU still in place and relevant? Are there potential new partners? What Governance opportunities can be developed? A mix of Government, Friends of, tourism industry, Aboriginal organisations and community groups who can all undertake collaborative responsibilities for the Track (obtaining funding, maintenance, monitoring, marketing and promotion). Driven by DBCA and the Friends of C2C, the future of Track Governance and management needs to be determined. This includes incorporating new partners to help deliver best track outcomes.
	Corporate sponsorship of the Track is supported and encouraged when it complies with the department's Sponsorship Guidelines. Can this be further developed?	Low The case studies presented within the appendices show other walks collecting sponsorships and donations. This is generally done through a non-Government Trails Trust or charitable organisation.
	Investigate opportunities for additional income streams	Medium The case studies present some additional income streams that could be considered for the C2C including track use fees, camp and accommodation fees, sales of merchandise and maps, lease arrangements for on track accommodation and licensing for on track activities (including commercial tour operators).
	Track accommodation is not supported within this Plan due to the feeling there is sufficient accommodation available off the Track, a want to keep the experience 'wild', keeping user	Medium This study delivers an overview from the perspective of stakeholders, the actual availability of existing accommodation, an analysis of what other Great Walk experiences are offering, and what gaps are evident in the C2C experience including accommodation.

	Action	Priority
	numbers sustainable and protecting environments.	
As per the Western Australia Strategic Trails Blueprint 2017-2021, need to:	Understand who is walking on trails by implementing a system for recording, analysing and publicising trail-related data and research relevant to WA.	High To help make well informed decisions, understanding exactly who and how many are walking on the C2C is essential. This will aid in justifying future track improvements, management and experiences. This will also enable monitoring of impacts, capacity and measuring success.
	Ensure that community development remains a consideration in trails planning, design, management, funding, research, events and participation programs.	High The C2C is a component of the Margaret River / Busselton / Augusta destination. The existing nature, culture and culinary offer can become integrated and packaged with the C2C experience. It is important that the Track does not compete with what exists, but supports community development and local pride and ownership.
	Investigate successful international financial management models	High Case studies provided specific to C2C within this Report. This includes a range of public, private and not-for-profit models and partnerships.
	Review and report on current legislative arrangements for user-pays options on trails and on commercial usage fee structuring	Medium A viability analysis has been provided for C2C within this report. The analysis investigates options for collecting revenue from accommodation use.
	Develop criteria to identify and prioritise the iconic trail development opportunities with strong potential to attract a range of visitor markets and contribute to the visitor economy. The opportunities should extend through the different types of trails and trail users	High An analysis of the existing C2C experience, target market overview and trail trends, Great Walks criteria and characteristics and benchmarking against similar trail experiences provided within this report.
	Conduct a market gap-analysis to identify trails where linked products (such as tours transport, logistics operations, accommodation) could be established in a cost effective manner to add to the attraction of the trail for target markets.	High An analysis of the existing C2C experience, target market overview, trail trends, Great Walks criteria and characteristics and benchmarking against similar trail experiences provided within this report. Gaps and opportunities to package existing experiences is also presented in the SWOT analysis.
	Facilitate linkages between private sector providers and trail opportunities/service gaps.	High As per above.
	For each priority iconic trail opportunity, identify the requirements (including infrastructure, signage, information, interpretation, products, services and accommodation), cost-benefit analysis and timeframe to bring the trail and associated products to market.	High A physical track assessment / audit is recommended to determine needs with improvements or new infrastructure including signage and interpretation. This could be delivered as a broader Track Master Plan including design concepts and indicative construction costs.

APPENDIX J - COLLECTION OF TRACK USE FEES

Discussions have previously been had around collection of track use fees. Some iconic multi-day walks require users to book the experience, and often charge a track fee. Collection of the fee provides a means of managing track use (such as maximum numbers for enjoyment, visitor safety and reducing environmental impacts) and re-investing fees back into track and visitor management and conservation. Sometimes the fees may be all inclusive and cover the costs of on track hut or campground use. In other instances, track fees are not collected, however users may be required to pay camp fees. The below table provides an overview of some of the iconic walking experiences and associated fee payments (if any) required.

Multi-day walk comparison of track use fees

Walk	Distance	User numbers	On track accom	Fees	Management
Cradle Mountain – Lake St Clair	65 km / 6 days	8,000 walkers per year (max 60 walkers per day – one way. Mix of independent and group permitted)	Privately operated huts & public campsites	\$200 per adult, \$160 per child Commercial operators pay fees to NTPWC	Tas Parks and Wildlife Service
Three Capes	48 km / 4 days	12,000 walkers per year (max 48 walkers per day one way. Mix of independent and one group the Great Walks operator with 14 clients permitted)	Huts managed by Parks and Wildlife Private luxury eco-accommodation for walkers on 'Great Walks' tour	\$495 per person, includes entry to Port Arthur Historic Site, car parking and secure lockers; Pennicott Wilderness Journey cruise; 3 nights self-catered accommodation in huts on track; bus transfer from Fortescue Bay back to Port Arthur Historic Site twice daily; "Encounters on the Edge" guidebook with maps and trail access. Commercial operators pay fees to NTPWC	Tas Parks and Wildlife Service
Larapinta Trail – NT	223 km (12-14 days)	4000-5000 walkers per annum (no bookings required except for groups of over 8 persons)	Campsites	Nil. Only charges public campsite fees (\$5-\$10) or off track private accommodation. Commercial operators pay fees to NTPWC	NT Parks and Wildlife Commission

Walk	Distance	User numbers	On track accom	Fees	Management
Great Ocean Walk Victoria	110 km / 8 days	Unknown. Campers must register and pay 2 weeks in advance. East to west direction. Limit 1 night at each hike-in campsite, limit of 12 per campsite.	Campsites	Nil. Only payment for national park campgrounds (\$32.30 per tent per night) Commercial operators pay fees to NTPWC	Parks Victoria
Heysen Trail SA	1200 km / 60 days	Estimate 200 people per annum to tent to end. 2000 per year to a section of the trail.	Campsites	Nil. Campsite fees only \$3-\$15 per night.	Partnership between Department of Environment & Water and Friends of Heysen.
Heaphy Track, New Zealand	82 km / 4-6 days (mountain biking also permitted)	4992 total (walkers and mountain bikers)	Huts or campsites	\$34 per person per night in hut or \$14 in campsite	Department of Conservation
Milford Track, New Zealand	53.5 km / 4 days	14,000 walkers each year ³⁷	Huts	\$70 per adult per night (NZ), international \$140 pp. Outside Great Walks season \$15 per person per night (NZ & internationals)	Department of Conservation

³⁷ <https://milfordtrack.net/>



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