

FINAL REPORT

South West Edge Trail Tourism Experience Opportunities



Concept *2* Strategy



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Produced in November 2023 by Concept 2 Strategy for Tourism Western Australia.

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Acknowledgement

Concept 2 Strategy recognises and values the heritage, culture and spiritual connection of Aboriginal people with the lands and waterways in Western Australia. We pay our respects to their cultures, and to their Elders - past, present and emerging.

Version Control: 090324



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EXECUTIVE SUMMARY

Tourism Western Australia has commissioned this *Trail Tourism Experience Opportunities* report to inform the development of trail tourism experiences in and around National Parks along the South West Edge – a drive trail that links the Perth, Peel, South West, Great Southern and Esperance regions.

This study will inform the Western Australian State Government’s National Park Tourism Experience Development Program (NPTED). The aim of the NPTED is to:

Complement existing Government investment in tourism infrastructure in WA’s National Parks, meet gaps in commercial short-stay accommodation offerings, and enrich the diversity and density of the tourism economy in the region, through the development of a mix of unique accommodation options, and increase the number of tourism products available.

In recent years, the Western Australian Government has invested considerable funds in constructing and upgrading trail infrastructure across Western Australia. This investment creates opportunities for developing new commercial tourism products which can attract and engage interstate and international visitors.

This report provides information that can be used to assist tourism operators to develop new products and experiences that utilise Western Australia’s world-class trail infrastructure.

The opportunities analysis has identified over twenty new experiential tourism products that meet the needs of interstate and international Destination Trail Users.

The identified opportunities focus on delivering “hero experiences”. That is, experiences that:

- Have the best potential to drive visitation and expenditure from interstate and international markets
- Reflect the heart and soul of the Western Australian brand story (*Walking on a Dream*) and represent where WA has a competitive advantage over other destinations
- Focus on what is unique, memorable and engaging about the destination

Collectively, these hero experiences will position Western Australia as a sought-after trail tourism destination.



REPORT STRUCTURE

This report consists of three parts:



Final Report

This document provides a high-level summary of key findings from the product audit and opportunities analysis.



Attachment A Trail Tourism Product Audit

A comprehensive audit of all trail tourism products and experiences in the South West Edge region as at August 2023. The audit includes a brief discussion of trail tourism and trail user markets, and a detailed analysis of the region's trail experience strengths and product gaps.



Attachment B Opportunities Analysis

A detailed discussion of experience opportunities by activity type. It includes a summary of Western Australia's iconic trails and trail networks, and a list of regional trail priorities.

Opportunities are grouped by activity (e.g. hiking or cycling) and include several product concepts per activity. At least one illustrative case study from Australia or internationally is included for each product concept.

How to use this report

This report has been developed to assist current tourism operators and potential business owners to identify and develop new trail-based tourism experiences that meet the needs of interstate and international Destination Trail Users.

The analysis focuses on **Destination Trail Users** because they provide the greatest opportunity to grow both visitor numbers and yield.

These experienced trail users travel regularly with trails as their primary motivator. They seek out high quality trails in outstanding scenic locations. Their travel decisions are often motivated by the desire to experience "bucket list" long trails (e.g. Overland Track in Tasmania), and/or recognised trail destinations (e.g. New Zealand).

The product concepts listed in this report are multi-day experiences. The fully inclusive nature of these products, their higher price points and set departure dates, make them attractive to Inbound Tour Operators (ITOs) and retail travel agents. For this reason, they are well suited to interstate and international visitor markets.

In contrast, day tours are less likely to be destination drivers for interstate and international trail visitors. However, they can increase yield, spend and length of stay by providing add-on experiences for independent travellers as well as interstate and

international visitors who have booked a multi-day trail tourism product. They also contribute to the density of experience offerings which supports reputation and awareness as a trail destination. While they are not the primary focus of this report, a list of potential new day products is included in Attachment B.

It is important to note that the product concepts listed in the Opportunities Analysis are suggestions that illustrate the types of products that could be developed to meet market demand. They have not been subject to market testing, and feasibility analysis and detailed market research will be required before these products can be brought to market.

In some cases, existing operators are already working in the sector and/or region and may be interested in expanding or diversifying their product offerings to take advantage of these opportunities. In other cases, a start-up may need to enter the market.

In most cases, the trail infrastructure required to deliver the experience is operational, but trail support services (e.g. shuttles or transfers) and accommodation may be lacking and will require further development before the product concept can be realised.

KEY FINDINGS - PRODUCT AUDIT

Approach

An audit of trail tourism products in the South West Edge region was conducted in August 2023 (see Attachment A).

The study region included businesses located in three regional tourism areas:

- **Destination Perth** (including the Perth metropolitan area and the Peel region);
- **Australia's South West** (including Bunbury-Geographe, Margaret River Region, Southern Forests and Valleys, and the Great Southern); and
- **The Esperance and South Coast region** (part of Australia's Golden Outback).

Businesses were included in the audit if the use of recreational trails was a significant part of one or more of their product offerings.

The gap analysis did not consider other supply gaps (e.g. events, trail infrastructure, trail services), gaps in demand (e.g. trail tourism marketing activities or positioning) or capability (e.g. workforce skills and development).

Regional Experience Strengths

The audit revealed that hiking is a signature experience strength, with the South West and Great Southern providing well-established experience offerings for hiking (see Table 1). These experiences already attract interstate and international visitors and meet the definition of a hero experience.

Cycling is an emerging experience across all regions except Esperance. The South West and Great Southern regions have emerging experience strengths in cycle touring on the iconic Munda Biddi Trail.

The recent development of purpose-built downhill and cross-country mountain bike trail networks in the Perth, Peel, South West and Great Southern regions supports a development opportunity in mountain biking.

Aquatic experiences remain under-developed across the region, representing a significant development opportunity for a region which is recognised internationally for its coastal attractions and lifestyle.

Table 1: Regional Experience Strengths in Trail Tourism

LOCATION	HIKING	CYCLING	MTB	AQUATIC	HORSE
Perth	✓		✓	✓	
Peel	✓		✓	✓	✓
South West	✓	✓	✓	✓	✓
Great Southern	✓	✓	✓		
Esperance	✓				

- ✓ **Signature** – product well established and represented in destination marketing
- ✓ **Emerging** – product is established, growing representation in destination marketing
- ✓ **Development Opportunity** – limited established product

Regional Experience Gaps

Multi-day Experience Gaps

The audit revealed that the multi-day hiking market is well catered for across the South West Edge, with numerous Western Australian-based and interstate-based tour companies running a regular program of multi-day hiking tours. Most of these utilise the iconic Cape to Cape Track and Bibbulmun Track, although there is a gap in the provision of luxury hiking products on the latter.

In comparison to other recognised hiking destinations in Australia and internationally, the region lacks experiences that utilise unique accommodation such as trail lodges, as well as indigenous cultural products.

There are also key gaps in multi-day offerings utilising iconic trails in regional destinations. For example, the Bald Head Trail in Albany and the trail networks in both the Fitzgerald and Cape Le Grand National Parks.

In contrast to hiking, there are very few multi-day products that focus on other trail activities such as:

- cycle touring
- mountain biking
- paddling
- horse riding

At the time of the audit, there were no multi-day trail experiences for trail running. Multi-activity experiences – that is, those that include more than one type of trail activity (e.g. hiking and paddling, or mountain biking and hiking) – were also notably absent.

Day Experience Gaps

The region has a reputation as a nature-based tourism destination and there are a diverse range of nature-based and ecotourism tours that incorporate trail activities.

However, very few of these day tours meet the definition of a hero experience for trail tourism.

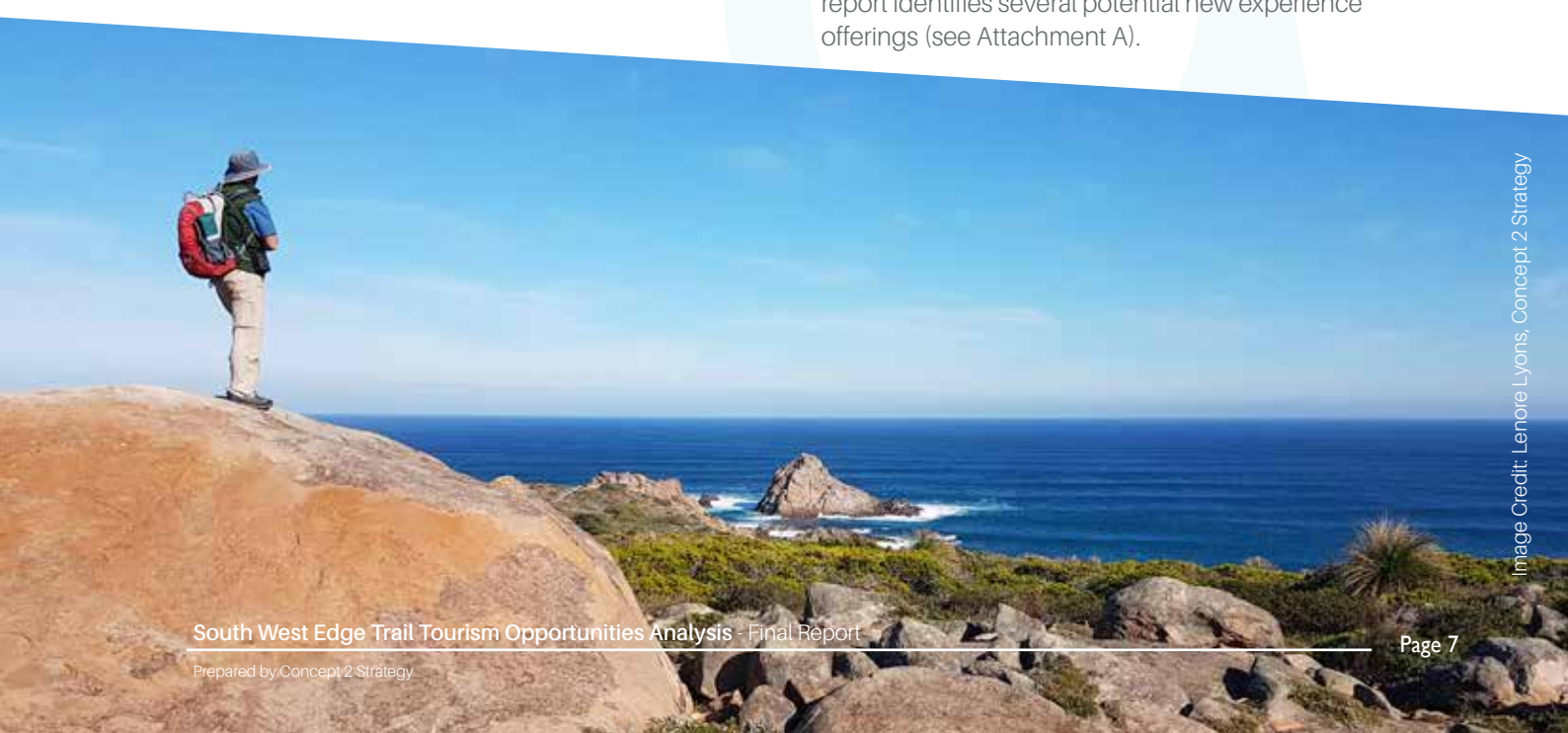
Common limitations include:

- the lack of a ‘wow-factor’ (i.e. awe-inspiring, memorable);
- the product does not utilise one of WA’s iconic trails or trail networks;
- the tour lacks live inventory (i.e. it is not instantly bookable); and/or
- the product is not distribution or export-ready.

There are also significant gaps in the supply of day tours for several trail activities. This includes:

- Day hikes (except Destination Perth)
- Trail running
- Mountain Biking (except Destination Perth and Margaret River Region)
- Gravel riding
- Recreational cycling
- Paddling (particularly whitewater and sea kayaking)
- Horse riding (except Destination Perth and Margaret River Region)

Although day tours were not the focus of the opportunities analysis (next section), the audit report identifies several potential new experience offerings (see Attachment A).



OPPORTUNITIES ANALYSIS

Approach

The opportunity analysis used five key criteria to identify potential new trail tourism experiences – distinctive destination; regional experience strengths; regional trail significance; trail activity market demand; and trail activity visitor segmentation.

Distinctive Destination

Successful trail destinations showcase distinctive natural and/or cultural landscapes. With such a wide range of trail experiences to choose from nationally and internationally, Destination Trail Users consciously seek out spectacular scenery and rare natural phenomena. Their aim is to immerse themselves in the landscape and interact with its people. An exceptional natural and cultural landscape is therefore critical to attracting Destination Trail Users.

Regional Experience Strengths

The focus area for this report is the Perth, Peel, South West, Great Southern, and Esperance and South Coast regions. The report has considered each region’s tourism experience strengths as identified through regional stakeholder consultation and document analysis.

Iconic Trails

In assessing the potential of each region to support trail tourism experiences, the report has prioritised development of the region’s iconic trails and trail networks. These are the best trails of their type – the trail experience is exceptional, and the supporting infrastructure, services and facilities are of high-quality.

Market Demand

Market demand for different trail experiences was determined via a review of existing market research, including Tourism Australia’s *Future of Global Tourism Demand*¹ report, and academic research on trail tourism; review of international best practice case studies and trail tourism trends; and interviews with key stakeholders and operators.

Visitor Segments

Existing research on trail-tourism visitor segments has been included where it is available. This includes the hiking and mountain biking visitor segments and personas contained in the *Western Australia Trails Market Research Report*.²

1. Tourism Australia (2022) *Future of Global Tourism Demand: Global tourism research into the experiences that will drive Australia’s tourism demand now and into the future*. November 2022.
2. Trail Futures (2021) *Western Australian Trails Market Research*. Report prepared for Tourism Western Australia.

Figure 1.
Experience Opportunity Criteria



Regional Opportunities

Multi-day experience opportunities were assessed based on type of trail activity (i.e. hiking or cycling). This approach provides a nuanced understanding of different target markets and their needs and interests.

While some market research suggests that most trail users prefer one type of activity over another, there is also evidence of an affinity between trail activities and other adventure activities. For this reason, where a destination has an experience strength in more than one trail activity type, consideration has been given to the opportunity for multi-activity experiences.

Drawing on research outlined in the *Future of Global Tourism Demand*, new product opportunities were mapped against three key experience clusters – wellness (transformation), adventure, and Aboriginal culture (heritage). These were chosen because they align closely with the region’s signature and emerging experience strengths – see Table 2.

To determine which region was best suited to the development of new multi-day trail tourism products under each experience cluster, several factors were considered:

- **Unique and/or exceptional natural landscapes or features that support the activity** (e.g. for whitewater activities, the presence of rivers with Level 2-4 rapids suited to paddlers of different skills and abilities).
- **Density of supporting products and services that support experience cluster** (e.g. for wellness-focused experiences, availability of a range of wellness services, practitioners and retreat-style accommodation).
- **High-quality trail or trail network** (e.g. recognised iconic trail or trail network, or existing trail destination with a range of regional trails).

Table 2: Multi-Day Trail Tourism Experience Opportunities by Experience Cluster and Region

Experience Cluster	Perth	Peel	South West	Great Southern	Esperance
Hiking					
Wellness			✓	✓	
Adventure				✓	✓
Aboriginal culture	✓	✓	✓	✓	✓
Cycling					
Wellness		✓	✓	✓	
Adventure	✓	✓	✓	✓	
Paddling					
Adventure (Whitewater)				✓	
Adventure (Sea Kayaking)				✓	✓
Adventure (Flatwater Canoe)			✓	✓	
Horse Riding					
Wellness			✓		✓
Adventure		✓	✓		

✓ ✓ **New product development opportunity**

Product Concepts

To assist operators to understand and evaluate these opportunities, twenty-two product concepts were developed – see Table 3. These concepts draw on examples of unique trail tourism offerings delivered in Australia or internationally.

Each product concept includes a description of the tour length (days/nights), location, trail/s, inclusions, market segment and market source, as well as a case study.

It is important to note that the product concepts are aspirational, that is, they provide an idea of a tourism experience that might meet the needs of the Destination Trail User market. However, they have not been subject to market testing, and feasibility analysis and detailed market research will be necessary before these products can be brought to market.







In some cases, existing operators are already working in the sector and/or region and may be interested in expanding or diversifying their product offerings. In other cases, a start-up business may be required to deliver the product.

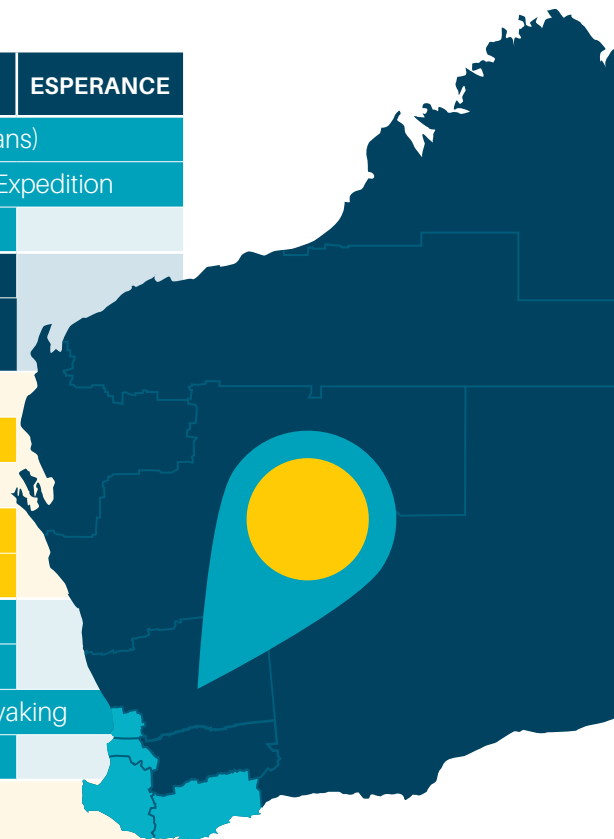
In most cases, the trail infrastructure required to deliver the experience is operational. In a limited number of cases, the trail infrastructure is under development and is anticipated to be completed by 2025. Most products will require land manager and trail manager support and approval.

A brief description of each product concept is contained below.

For further detail, refer to Attachment B.

Table 3: Trail Tourism Opportunities by Activity and Region

	PERTH	PEEL	SOUTH WEST	GREAT SOUTHERN	ESPERANCE
HIKING 	Walking on Country (Aboriginal Custodians)				
				Adventure Expedition	
				Bibbulmun Luxury	
TRAIL RUNNING 				Trail Running & Wellness	
				Hill Running Adventure	
CYCLING 	Single-track MTB Adrenaline				
				Cross-country MTB Adventure	
	Adaptive MTB				
	Gravel Adventure				
			Regenerative		
PADDLING 	Family Canoeing				
				Whitewater Rafting Adventure	
				Sea-kayaking	
				Flatwater Kayaking	
HORSE RIDING 				Heritage Trail	
	Family Trail Riding Camp				
				Women's Wellness	Women's Wellness
MULTI-ACTIVITY 	Paddle, Peddle, Promenade				
				Hike, MTB, Raft Adventure	
	MTB, Rock Sports, Coastal Adventure				
	Transformative				



Concept Descriptions



HIKING

Adventure Expedition – Stirling Range

A true wilderness hike, this is a challenging bushwalk with long days carrying a big, heavy pack in difficult conditions. The terrain is rugged and steep. There is no marked trail, no formal campsite and no water. This trek is for those who enjoy a challenge and like to get off the tourist tracks and into the real backcountry.

Walking on Country

An immersive guided overnight hike that brings together stunning natural landscapes and ancient cultural knowledge. Led by Aboriginal guides who share their knowledge of the world's oldest living culture. At the end of the day, camp overnight in a purpose-built campground with traditional custodians.

Bibbulmun Track Luxury Hike

Each night of your epic walk on the Bibbulmun Track will be spent in a unique eco-camp built on sustainability principles. Each morning you have the option of a wellness activity or indulge in a moment of peaceful solitude in your private accommodation. This tour showcases the very best of regional produce and southern climate wines. You'll return from this walk revitalised in mind, body and soul.



TRAIL RUNNING

Trail Running and Wellness Retreat

Imagine yourself running on the spectacular Cape to Cape Track admiring the amazing views, followed by a dip in the ocean at one of Margaret River's unspoilt beaches. Off-track you'll be pampered and rejuvenated at a luxurious retreat. Your fully-inclusive package includes healthy wholefoods, local produce and wine, and indulgent spa treatments.

Hill Running Adventure

Run the highest peaks in the south west on an iconic multi-day route that includes the stunning peaks of the Stirling Ranges and Porongurups. Most of these trails are rugged tracks that involve scrambling and some climbing. You'll certainly get a workout, and the immense satisfaction of tackling the region's wild landscape.

Concept Descriptions



CYCLING

Single Track MTB Adventure

Spend a week exploring WA's epic new mountain bike trails. These single-track trails have been built by the best in the business, providing awesome gravity, flow and technical trails in stunning locations. All-inclusive shuttle service (with helicopter flights) includes Perth's infamous Camel Farm, the Dwellingup MTB Trails, Wambenger (Collie River Valley) MTB Trails, and Nannup Tank 7 MTB Park. Your adrenaline journey ends in Margaret River at the Woodjilup Trails (aka Compartment 10) and a well-deserved brew or two overlooking the ocean.

Valley of the Giants Cross-country Adventure

Embark on a journey of discovery as you explore a remarkable forest dominated by unique tingle trees – literal giants – found nowhere else in the world. This two-day cross-country mountain bike adventure traverses the heart of the Valley of the Giants. All-inclusive, with transfers, your package includes soaking in your very own hot tub at the end of each day's ride. The highlight of your trip will be riding through the cavernous base of a tingle tree.

Adaptive MTB Supported Adventure

An epic cycling adventure on WA's purpose-built adaptive MTB trails. This tour is designed for some prior knowledge and experience of adaptive mountain biking. Expert guides will be on hand to provide you with hints and tips to get the most out of your bike. Staying in accommodation suitable for you, your carer or family members, this tour allows plenty of time to travel to each destination and recharge after a day on the trails.

Munda Biddi Gravel Adventure

Experience an unforgettable feeling of freedom and adventure gravel bike riding on the Munda Biddi Trail - 'the path through the forest'. You'll be riding a mix of roads, including gravel roads and single-track. Each day offers a variety of terrains and trail surfaces to refine your gravel riding skills. Suitable for intermediate and experienced gravel riders, our local knowledge means we can ensure your gravel biking holiday is tailor-made to your requirements.

Regenerative Cycling Holiday

Margaret River is one of Australia's premier wine regions, yet its appeal extends far beyond the cellar door. There are a growing number of locals who are passionate about producing food sustainably and sharing their farms and food with visitors. Cycle at your own pace on a network of local trails and country roads, sampling delicious wines and produce. You'll be staying in unique accommodation at organic and permaculture farms, foraging for fresh produce, and learning how to make cheese. With your luggage transferred, logistics sorted and accommodation booked, all you need to do is pedal your e-bike and enjoy!

Family Canoeing Camp

Looking to spend time reconnecting as a family? Want to get away from the busyness of life and spend time in nature? This family-friendly canoe trip provides the perfect opportunity for family bonding time. Suitable for children over 5 years of age, this canoe trip helps kids gain confidence and interest in the outdoors while the adults kick back and relax. There's lots of opportunity for fun along the way – swimming, exploring and camping over two nights.

Whitewater Rafting Expedition

Negotiate the untamed waters of the Frankland River Western Australia on a whitewater rafting adventure. Experience the majesty of the giant Tingle Trees, surging rapids, and tranquil river flows. Each night you'll camp under the stars, enjoying delicious food and swapping stories about the day's adventure.

Historic Coast Sea Kayaking Adventure

Explore Albany's beautiful coastline and learn about the incredible history of these stunning waters. Your professional guide will share stories of the seafarers and explorers who navigated these waters prior to establishing Western Australia's first European settlement. Package includes entry to Albany's Historic Whaling Station, the National Anzac Centre, and a guided tour with a local Aboriginal guide.

Kapagup-Nornalup Kayaking Holiday

Explore the tranquil waters of the Walpole Wilderness on a five-day kayaking holiday. You'll paddle along meandering rivers sheltered by towering karri trees, and visit beautiful sandy beaches surrounded by stunning coastal heath. Your self-guided itinerary includes transfers from your accommodation, meals and snacks, kayaking and safety equipment, maps and suggested daily itineraries. With three rivers and two inlets to explore, you'll be spoilt for choice.

Bay of Isles Sea Kayaking Expedition

Experience the pristine waters of the southern ocean on a sea kayaking adventure. Your sea kayaking trip includes two nights at Woody Island, where you will have the chance to snorkel in the pristine, clear temperate waters that surround the island. Explore remote islands, camp overnight under the stars and wake to brilliant sunrises over the ocean. Wildlife abounds in these waters which are home to sea lions, dolphins and whales.

PADDLING



Concept Descriptions



HORSE RIDING

Warren Blackwood Stock Route Adventure

Join us for an equestrian adventure that brings to life the heritage of Australia's cattle droving stock routes. Experience the beauty of giant forests, tranquil rivers, peaceful inlets, and picturesque rural towns. You'll camp overnight with your horse, sharing stories around the campfire and imagining the life of the long-distance cattle drover of yesteryear.

Southern Forests Trails

This horse riding trail tour offers a mix of tuition and enjoyable rides through peaceful forests. Suitable for adults and children of different ages and abilities, this trip will introduce you to the pleasures of trail riding on a network of dedicated bridle trails. You'll camp out under the stars at the Shannon Horse Camp. Each day you'll receive instruction from our expert instructors, followed by a ride through the forest.

Women's Horse Riding Wellness Retreat

Combine your love of horses with yoga, meditation, and massage for the ultimate wellness retreat. Each day will combine yoga sessions as well as exhilarating rides through the magnificent forest and coastal scenery of the Margaret River region. At the end of the day, you'll be pampered with a range of spa treatments. You'll stay in peaceful accommodation, providing magnificent views of the surrounding countryside, and indulge in an organic wholefood menu specially designed by our chef using local produce.





Paddle, Peddle and Promenade

Explore the beautiful forests, rivers and lakes of Wellington National Park. Your adventure starts with a gentle kayak trip from Honeymoon Pool downstream along the river. Depending on the time of year, there may be some small rapids and the trail ends at a small waterfall where you can take a dip. After a relaxing night at our campsite near Honeymoon Pool, we embark on a hike on a section of the Wilman Bilya Trail that skirts through the marri and jarrah forest along Wellington Reservoir. Your adventure concludes with a fantastic cycle trail along the shared-use Sika Trail, concluding at the amazing Wellington Dam mural.

Walpole Wilderness Adventure Tour

On this five day guided tour, you'll experience the adrenaline of rafting on the stunning Frankland River; mountain biking through the giant tingle forests along single track cross-country trails; and hiking along peaceful forest trails with river and inlet glimpses. Staying in peaceful chalet-style accommodation, each night you'll have the chance to refresh and enjoy quality local produce. Share stories of the day's adventures with fellow travellers, observing wildlife and the stars.

Ultimate South West Adrenaline Tour

Get ready for the ultimate adrenaline hit. Five days jammed packed with extreme outdoor adventure. We kick off our trip in Perth with two days shredding the downhill trails in the Perth Hills and Dwellingup. Then we hit the magnificent Margaret River coast with a day of surfing and coasteering (hint: jumping off coastal cliffs and rocks into the roiling ocean below). We top that off with another day in the surf followed by abseiling and caving. Our final morning we hit the trails for a run (or a slow walk!) through the Boranup Forest before returning to Perth. Each night you'll enjoy a pint and a meal in one of the region's iconic pubs, distilleries or craft brewhouse, swapping stories with your fellow adrenaline junkies. Trips cater to all skill levels, with expert instructors on hand to provide coaching tips and advice.

Transformative Retreat

Join us for a truly transformative experience in one of the world's unique biodiversity hotspots. Your program includes daily morning yoga and meditation. After a brunch that celebrates organic, wholefoods sourced from local permaculture farms, we embark on a daily excursion into nature. Daily activities include stand-up paddleboarding, wild swimming, hiking, forest bathing, and cycling. There's plenty of time for relaxing in the afternoon. Enjoy a massage, spend time journaling, and move at your own pace.

**MULTI-
ACTIVITY**



CONCLUSION

The South West Edge region of Western Australia is well positioned to become a sought-after trail tourism destination.

The region's stunning coastal and terrestrial landscapes, unique biodiversity and cultural heritage, and high-quality trail networks, provide the building blocks for a range of exceptional trail tourism experiences.

To attract interstate and international Destination Trail Users to the region, however, these natural and cultural assets need to be supported by a diverse range of commercial tourism products and experiences.

This report aims to assist business owners and start-ups to identify product gaps and opportunities that could be the basis for new trail tourism experiences.

The opportunities analysis (Attachment B) summarises recent market research on different trail experiences and provides examples of trail tourism products already in-market in Australia and internationally. These case studies may help operators to understand the types of experiences that Destination Trail Users are interested in and that are popular in other destinations.

The task of attracting interstate and international Destination Trail Users to Western Australia is not without challenges. There is strong competition internationally for a share of the trail tourism market. If the South West Edge region is to compete, its trail tourism offering needs to be exceptional.

Highlighting the South West Edge's unique qualities and attributes – that is, its landscapes, biodiversity, culture and people – is critical to the process of growing the region's reputation as a trail tourism destination.

So too is showcasing the region's iconic trail networks. These signature trails and trail networks are the best of their type. Destination Trail Users are motivated to travel to areas of exceptional beauty, significant heritage and culture, and/or trails that offer special challenge or adventure.

The product concepts listed in this report represent a starting point from which tourism operators can build trail tourism experiences that represent the best that the South West Edge has to offer. In doing so, they will amplify the heart and soul of the Western Australian brand.

