

# ATTACHMENT A PRODUCT AUDIT

**South West Edge Trail Tourism  
Experience Opportunities Analysis**



Concept *2* Strategy





# ATTACHMENT A PRODUCT AUDIT:

## South West Edge Trail Tourism Opportunities Analysis

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

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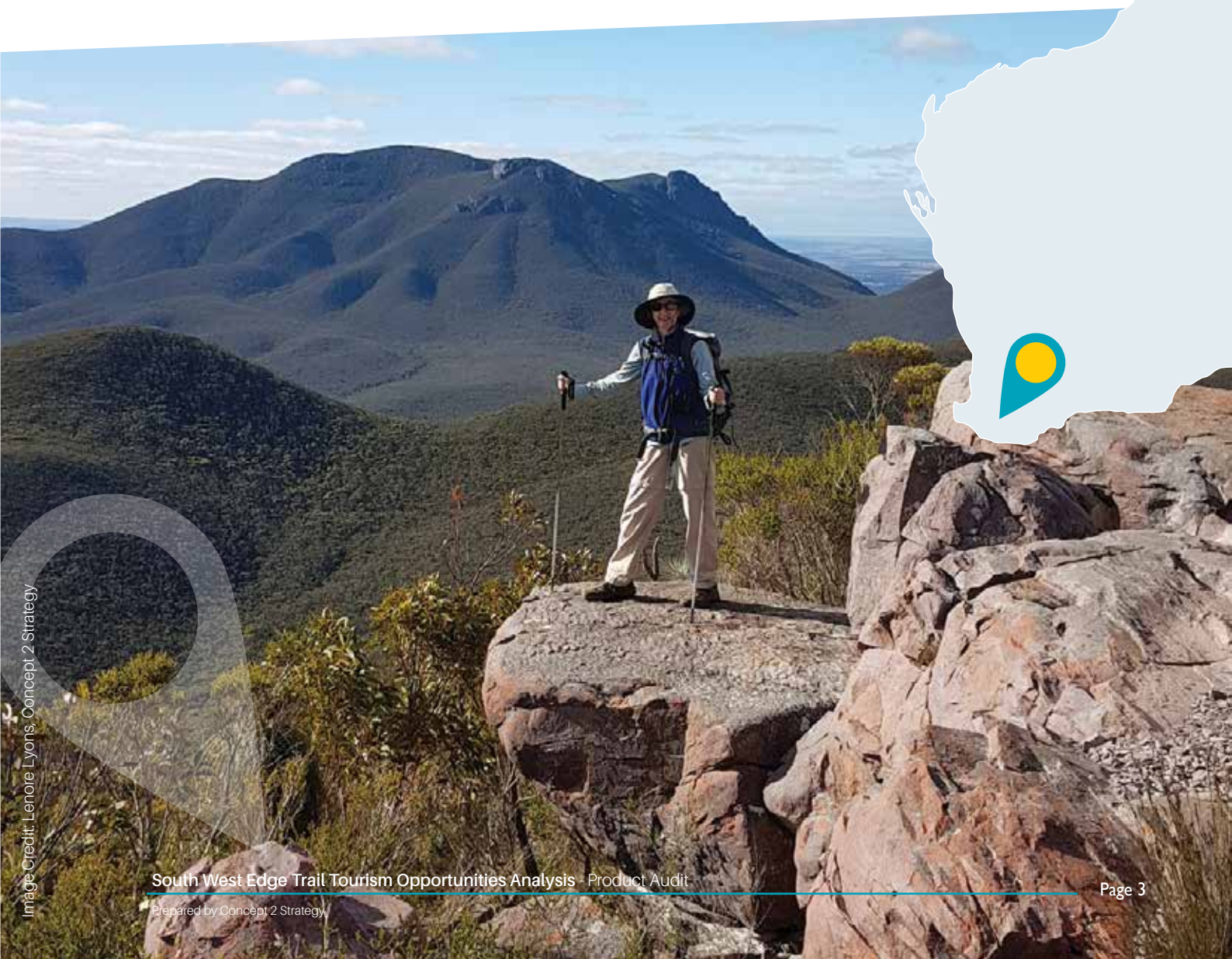
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# OVERVIEW

This document provides a summary of the results of a trail tourism product audit for the Perth, Peel, South West, Great Southern and Esperance regions of Western Australia.

## Background

Tourism Western Australia has commissioned this study to identify a comprehensive list of tourism product opportunities on, and around, trail infrastructure in Western Australia's Perth, Peel, South West, Great Southern and Esperance regions.

This trail tourism product audit forms part of a trail tourism gap analysis. The gap analysis will help to identify experiential tourism product opportunities that don't currently exist, providing information that can be used to assist operators in developing new products and potentially informing a prospectus to help attract new operators and investment to develop identified opportunities.

It will be used to identify key gaps and opportunities, as well as potential areas for diversification and/or improvement of existing products in order to meet the needs of the trail user market.

## Approach

This product audit was completed in July and August 2023 using a combination of stakeholder

interviews and digital data scrapes. It consists of two parts:

1. Business Audit
2. Benchmarking of hero experiences

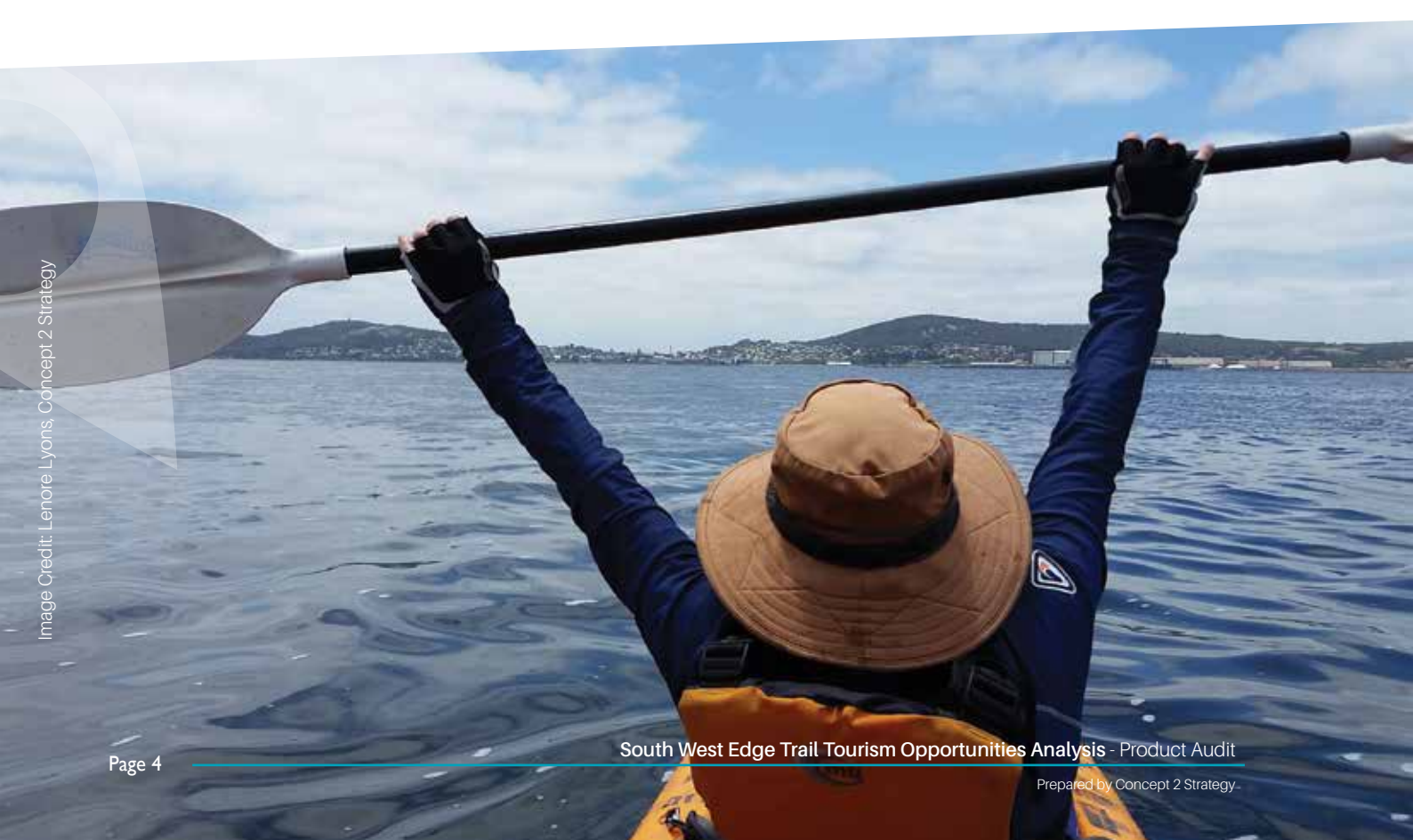
## Business Audit

The audit aimed to capture the full range of trail tourism products, services and experiences currently on offer in the Perth, Peel, South West, Great Southern and Esperance regions.

Data was collected via website data scrapes of business websites, Visitor Centre websites, Chambers of Commerce websites, Regional Tourism Organisation (RTO) websites, the Australian Tourism Data Warehouse (ATDW), and booking aggregators.

## Product Benchmarking

Product offerings were then benchmarked against a project definition of "hero experiences" to determine the extent to which they would be considered attractive to an interstate or international visitor. The concept of "hero experiences" is discussed later in this report.





# Types of Trail Activities

For the purposes of this report, a **trail** is an established path, route or track which often traverses natural areas and is used by people for non-motorised recreation. Recreational trails may be terrestrial or aquatic, they may be linear or looped, and may be standalone or part of a network.

## Terrestrial Trail Activities

Terrestrial (land-based) trails typically utilise a purpose-built pathway constructed from natural soil, sand, or gravel, or artificial pavement (e.g. concrete).

Terrestrial trail activities include:

### Hiking

Walking on a natural trail surface through a primarily natural landscape. 'Bushwalking' is a term that is used primarily in the Australian context. A range of other terms are used internationally, including walking, trekking, tramping, rambling, and strolling. The term hiking is inclusive of all abilities - some trails are specifically designed to accommodate the use of mobility aids such as wheelchairs and strollers.

### Trail Running

Running on a natural trail surface through a primarily natural landscape. Trail runners may use hiking trails and off-road paths such as firebreaks or roads.

### Cycling

The use of a bicycle or electric bicycle on a trail. The term 'cycling' incorporates a range of different disciplines, riding styles, interests, and bike types. It includes leisure riding on urban pathways, road cycling, mountain biking (MTB), gravel riding, and cycle touring. Mountain biking is often used as an inclusive term to refer to all forms of off-road cycling. Cycling is inclusive of all abilities - some trails are designed to accommodate bicycles built for wheelchair users (e.g. hand crank cycles).

### Horse Riding

Riding a horse on a natural trail surface or through a natural landscape.

## Aquatic Trail Activities

Aquatic (water-based) trails typically utilise rivers, lakes/inlets, and coastlines. Aquatic trail activities include:

### Kayaking, canoeing, rafting and stand-up paddle boarding (SUP)

Involves paddling a vessel on a range of waterways, including flat water, white water, and in the ocean.

### Snorkelling and diving

May follow a designated path (trail) utilising in-water signage and/or interpretation; or choosing one's own path at a known snorkelling or diving site.

### Coasteering

An activity that involves exploring a coastline by climbing and jumping off rocks, and ocean swimming.

The following aquatic experiences are not typically regarded as trail activities because they do not involve following a designated path or paddling/swimming from one location to another. However, they are included in this study because they may provide a unique opportunity to capitalise on the region's brand strengths.

### Wild swimming

Also referred to as open water swimming, involves swimming in a natural body of water such as a river, lake or ocean.

### Surfing, windsurfing, and kitesurfing

An activity that currently occurs in numerous locations along the coastline and on some inlets.

# What is Trail Tourism?

Trail tourism is a form of leisure travel where the use of recreational trails in a natural environment forms a significant part of the experience. Trail use may be the primary motivator of travel, or it may be combined with other forms of activity.

Trail tourism is generally considered a form of nature-based tourism, that is, travel where the primary motivation is to spend time in natural areas.

Nature-based tourism encompasses a diverse range of interest areas, including adventure tourism, coastal and marine tourism, wildlife and botanical tourism, agritourism, wellness tourism, and cultural tourism.

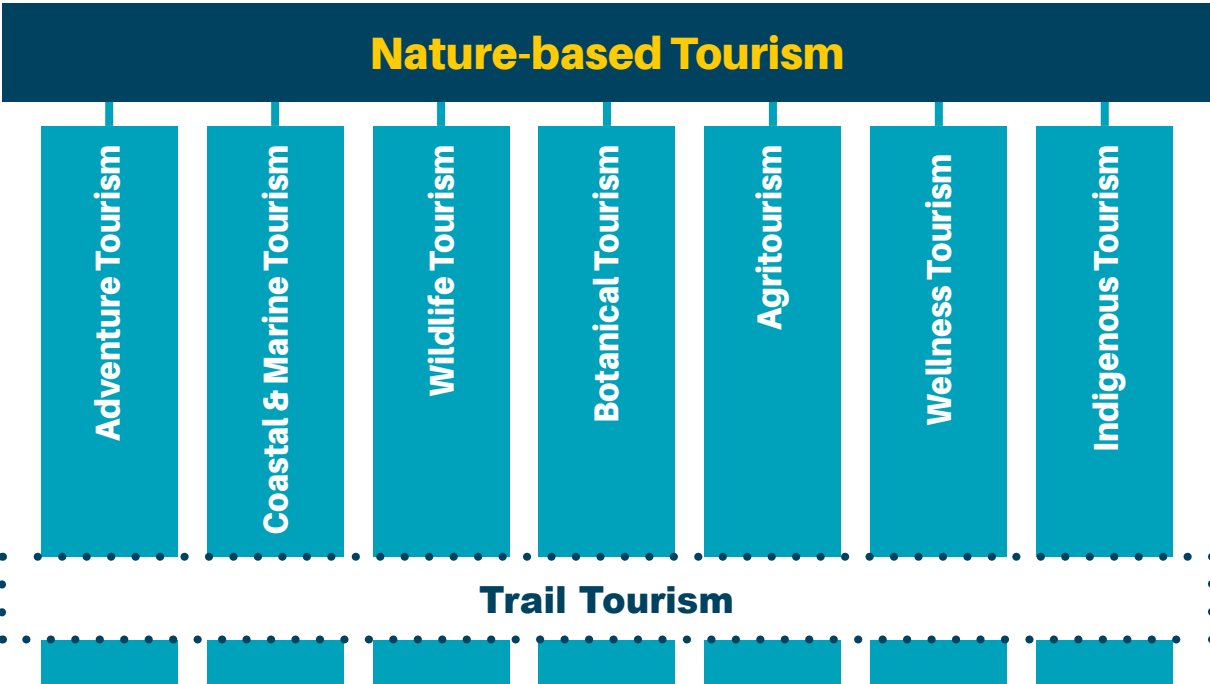
Trail tourism may be present in all forms of nature-based tourism (see Figure 1). The key distinguishing characteristic of trail tourism is *that the use of recreational trails forms a significant part of the experience*.

Using this definition, wildflower tours that involve walking on recreational trails would be regarded as a form of trail tourism. Whereas a bus tour that involves driving to multiple wildflower ‘hotspots’ with limited walking, would not be considered trail tourism.

Trail tourism therefore encompass a diverse spectrum of experiences that occur on terrestrial and aquatic trails, including:

- **Risk taking or thrill seeking** (e.g. downhill mountain biking or coasteering)
- **Immersion in natural environments** (e.g. bushwalking or canoeing)
- **Environmental conservation** (e.g. contributing to environmental sustainability through voluntourism on trails)
- **Engagement with indigenous culture and communities** (e.g. Aboriginal tourism)
- **Observation of wildlife and/or natural landscapes** (e.g. birdwatching or wildflower tours)
- **Consumption of regional food and produce** (e.g. cycling tour of wineries)
- **Participation in wellbeing activities** (e.g. forest bathing).

Figure 1: Trail Tourism as a form of Nature-based Tourism\*



\* Builds on and expands on taxonomy developed by Weaver, David, Bill Faulkner, and Laura Lawton (1999) *Nature-based tourism in Australia and beyond: A preliminary investigation*, CRC Tourism Work-in-Progress Report Series: Report 1.

# BUSINESS AUDIT

The Business Audit was conducted between 3 July 2023 and 15 August 2023.

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

The audit identified 59 businesses that met this definition within the Perth, Peel, South West, Great Southern and Esperance regions (see Figure 2).

All of these businesses run tours. Some also provide hire equipment, training, and/or transport services. While this audit does not focus on non-tour services offerings, they provide the operator with the ability to value-add to their experience offering by utilising these services in new product development.

## Business Location

The majority of businesses are based in Western Australia (86 per cent). Of these, thirty-nine per cent have their business address in Perth (n=20) and forty-five per cent are based in the South West (n=23) – see Figure 3.

Fourteen per cent of tour operators are based interstate (n=8).

## Tour Delivery Region

Most tours are delivered in the South West (n=36) – see Figure 4. Note some operators deliver in multiple locations, hence the total is greater than 59.

Figure 2: Number of Trail Tour Operators (August 2023)

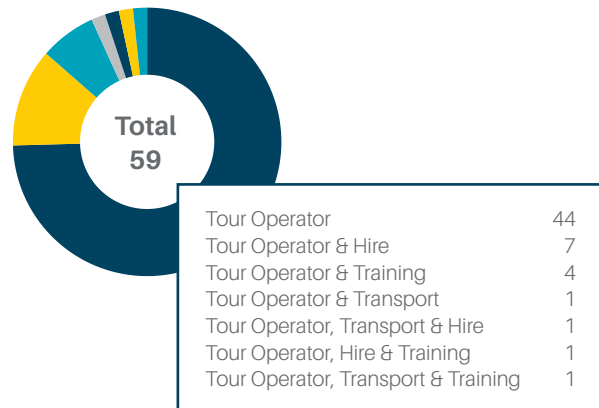


Figure 3: Tour Operator Business Location (August 2023)

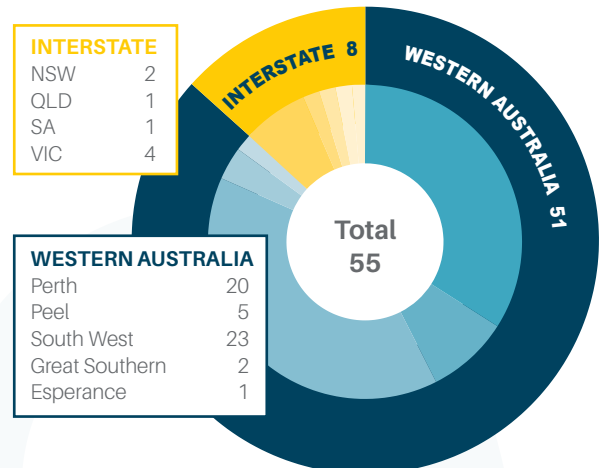
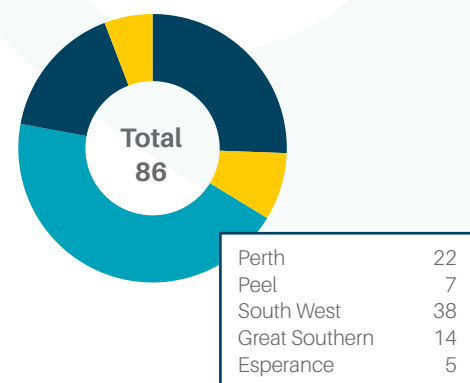


Figure 4: Tour Delivery Region by Number of Operators (August 2023)



# BUSINESS AUDIT

## Tour Length

Most tour operators offer day experiences.

The majority of hiking tours are multi-day experiences, whereas cycling, mountain biking, horse riding, and aquatic experiences are primarily day tours.

Only three operators offer both day and multi-day tours.

Figure 5: Tour length by Number of Operators (August 2023)

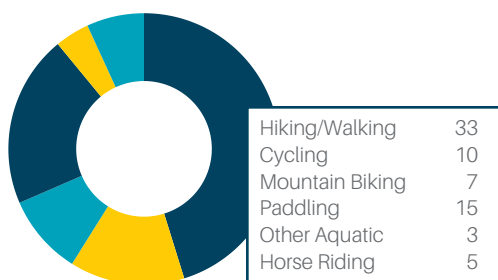
DAY	40 Operators
MULTI-DAY	16 Operators
DAY & MULTI-DAY	3 Operators

## Trail Type

Most tour operators provide hiking/walking trail experiences (n=33).

Note that the total is greater than 59 because some operators offer a range of products for different trail types (e.g. hiking tour, cycling tour) and/or products utilising one or more trail types (e.g. a hiking and paddling tour) – see Figure 6.

Figure 6: Trail Experience Type by Number of Operators (August 2023)



### KEY

**Cycling** – includes cycling on dual-use paths, rail trails, and off-road touring (e.g. Munda Biddi Trail)

**Mountain Biking** – cycling on designated MTB trail networks – primarily downhill and/or cross country

**Paddling** – kayaking, canoeing, stand-up paddle boarding

**Other Aquatic** – swimming, coasteering, surfing

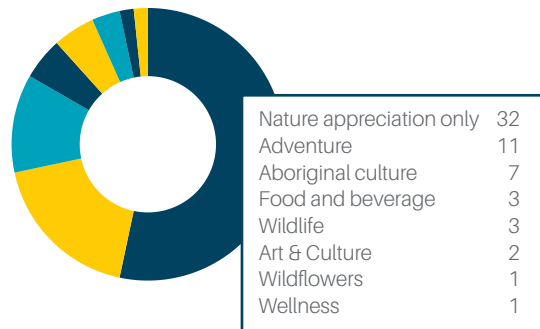
## Experience Domains

All tours have a strong focus on nature appreciation and/or spending time in natural areas.

Twenty-seven operators incorporate other experience domains. For example, there are seven Aboriginal cultural tours, and eleven adventure tours (e.g. downhill mountain biking, sea kayaking, coasteering, horse riding).

Note that the total is greater than 59 because some operators offer products with multiple experience domains (e.g. nature appreciation and food and beverage) – see Figure 7.

Figure 7: Experiences Domains of Operators (August 2023)



The presence of other experience domains is reflected in key marketing messages and product descriptions.

The significance placed on recreational trail experience varies. For example, some Aboriginal cultural tours are described as “cultural walking tours”, whereas others are described as “cultural heritage tours”. And yet, both involve the use of walking trails of similar length and duration.

In other cases, the emphasis is on niche interests rather than trail use. For example, “wildflower tours” or “forest bathing”.



## Trail Experience Type

Most regions offer hiking and cycling experiences. Note that the table identifies experiences not business operators, and hence the number is greater than 59.

- There are no mountain biking experiences offered in the Great Southern or Esperance regions, reflecting the lack of high-quality MTB trails.
- The Esperance region currently only offers hiking experiences, including in Cape Le Grand National Park and the Fitzgerald River National Park.

Table 1: Trail Experience Type by Region (August 2023)

Trail Experience Type	Perth	Peel	South West	Great Southern	Esperance
Hiking/Walking	10	4	23	12	5
Cycling	3	1	6	3	
Mountain Biking	3	1	4		
Paddling	6	2	6	1	
Other Aquatic	1		3		
Horse	1	1	3		

The South West region offers the greatest diversity of trail experience domains.

Table 2: Experience Domains by Region (August 2023)

Experience Focus	Perth	Peel	South West	Great Southern	Esperance
Nature appreciation only	13	4	23	11	4
Adventure	4	1	7	2	
Aboriginal culture	3		2	1	1
Food and beverage			2		
Wildlife	1		1		
Art & Culture		1	1		
Wildflowers			1		1
Wellness	1		1		

# BENCHMARKING

Each trail tourism product offering has been benchmarked against the project definition of a “hero experience” to determine whether it would be attractive to an interstate or international visitor.

## Hero Experience Definition

The following working definition of a “hero experience” has been developed for this study:

### Hero Experiences:

- 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

### Hero trail tourism experiences are:

- Most likely to occur on Western Australia’s iconic trails/trail networks and/or trail destinations (using the framework outlined in the *Western Australian Trails Market Research (2011)* report and updated to reflect new trail development)
- Have the potential to elevate an existing ‘hero destination’ (i.e. “Where the destination name on its own is sufficient; the location is well-known, easily searchable or a common feature on Western Australian travel itineraries”) or to become a ‘game-changer’ that will build on the reputation and market awareness of an emerging destination
- Meet the needs of the “Destination Trail User” market
- Have the potential to deliver a ‘wow-factor’ (awe-inspiring, memorable)
- Support the principles of sustainable tourism development
- Distribution or export-ready (or could become commissionable with assistance)

## Destination Trail Users

It is generally acknowledged that there are two distinct trail visitor markets – “Destination Trail Users” and “Trail Users While on Holiday” – who are distinguished by the significance of trails in their travel choices (see Figure 8).

Figure 8: Key Trail User Markets



### Destination Trail Users

- Experienced trails users who regularly travel with trails as a primary motivator.
- They have likely visited other Australian or international trails destinations.
- They seek high quality trails with good supporting infrastructure in scenic/natural locations.



### Trail Users While on Holiday

- Typically, less experienced trail users whose primary motivator for travel is not trails.
- While they view trail use as a secondary motivation for their visit, they will participate in trail activities and will likely hire or require equipment.
- They may place less emphasis on the trail and more on accessibility of the facility, the setting and nearby attractions and amenities.

These two trail user markets can be segmented based on demographics, psychographics and behaviour.

For further information on these market segments, refer to Trail Futures (2021) *Western Australian Trails Market Research* report prepared for Tourism Western Australia.

# Ability to Attract Destination Trail Users

## Multi-day Experiences

The trail audit has identified a significant number of multi-day experiences that meet the definition of a “hero experience”. These experiences already attract interstate and international visitors.

### Multi-day Hiking Tours

The audit identified 36 multi-day hiking tours. These experiences cater to a diverse range of markets including luxury travellers and active lifestyle travellers. The product offerings vary in terms of accommodation standard and type (see Table 3), the total number of days (see Table 3), inclusions, and guided vs self-guided.

Almost two-thirds of all multi-day hiking tours utilise the Cape to Cape Track (n=21), and another third utilise the Bibbulmun Track (n=12).

There are fewer tour products utilising other iconic trails in the study region. There are two dedicated tours of the trails within the Stirling Range and Porongurup National Parks (both 5 days guided), and another longer tour (8 days) that incorporates walks in Albany’s national parks including Bald Head. This is the only tour package that visits this iconic trail.

There are four dedicated tours of the trails within the Fitzgerald River and Cape Le Grand National Parks.

There is only one package that includes the Rottnest Island hiking trails - this is a Walk into Luxury Cape to Cape tour with a Rottnest add-on.

### Cape to Cape Track Packages

- Most are solely on the Cape to Cape (n=18)
- Two are combined with the Bibbulmun Track
- One incorporates Rottnest Island trails
- Half of the product offerings are “luxury” walks staying in 5-star accommodation with an emphasis on food and beverage offerings
- Wide range of options regarding length of tour (3-10 days); with a median of 8 days
- Most tours are guided (n=16)
- Average price is \$3,300 per person, maximum price of \$9,695 (10 days Cape to Cape)

### Bibbulmun Track Packages

- Most are solely on the Bibbulmun Track (n=18)
- Two are combined with the Cape to Cape Track
- One includes Bluff Knoll in the Stirling Range National Park
- There are no 5-star accommodation options, the majority use 3-star accommodation
- Wide range of options regarding length of tour (5-10 days); with a median of 7 days
- Most tours are guided (n=10)
- Average price is \$2,750 per person, maximum price of \$3,899 (5 days Bibbulmun Track)

Table 3: Multi-day Hiking Experience Offering by Accommodation Standard (August 2023)

Location	Accommodation			Total
	5-star	3-star	Camping	
Cape to Cape Track	10	9	2	21
Bibbulmun Track		10	2	12
Torndirrup NP, Gull Rock NP (Albany)*		1		1
Stirling Range NP, Porongurup NP		4		4
Fitzgerald River NP, Cape Le Grand NP		4		4
Rottnest Island*	1			1

\* Not a standalone destination, always combined with another iconic trail



# BENCHMARKING

## Multi-day Experiences

Table 4: Multi-day Hiking Experience Offering by Number of Days (August 2023)

Location	Days								Total
	3	4	5	6	7	8	9	10	
Cape to Cape Track	1	3	2	2	4	6		3	21
Bibbulmun Track			1	4	2	3	1	1	12
Albany region (not Bibbulmun Track)*						1			1
Stirling Range NP, Porongurup NP			2		1				4
Fitzgerald River NP, Cape Le Grand NP					4				4
Rottne Island*					1				1
<b>Total</b>	<b>1</b>	<b>3</b>	<b>5</b>	<b>6</b>	<b>12</b>	<b>10</b>	<b>1</b>	<b>4</b>	<b>43</b>

\*Not a standalone destination, combined with another iconic trail

Total is greater than 36 because some products include multiple destinations

There are twelve (12) businesses offering multi-day hiking tours. Half of these (n=6) are based in Western Australia; and the other half are based interstate.

Only three businesses offer products for the "luxury" market - Life's an Adventure (NSW), Walk into Luxury (WA), and Aus Walks (VIC).

### Multi-day Cycling Tours

There are four multi-day cycling tour offerings - all on the Munda Bididi Trail - and all meet the definition of a "hero experience".

These are fully-guided, inclusive tour offerings on either the Northcliffe to Walpole or the Albany to Walpole sections of the trail.

- All tours utilise 3-star accommodation
- Tours run over 6 or 7 days

The average tour price is \$2,550, with the maximum price \$2,900

### Multi-day Paddling Tours

There are two multi-day tour products that incorporate paddling, however, neither of these products meets the definition of a "hero experience".

- Dwellingup Adventures overnight hike and canoe tour
- Surf and Dirt Adventures includes kayaking in a 3-day Margaret River experience

### Multi-day Horse Riding Tours

There are two multi-day horse riding tours - both in the Margaret River region - of which one meets the definition of a "hero experience".

The fully-guided, inclusive tour offering by international tour operator Globetrotters, is run over 5 days based on a property in Margaret River.

- Stay in glamping tents, all meals
- Riding through forests, beaches, rural properties, and vineyards and farms
- Includes Aboriginal cultural tour and Welcome to Country
- \$3,520 for a 5-day itinerary

## Day Experiences

The entire region lacks day tour product that meets the definition of a “hero experience”.

While it is beyond the scope of this report to describe the reasons why each tour product fails to meet this benchmark, the following summary outlines common limitations:

- Lacks a “wow-factor” (awe-inspiring, memorable)
- Does not utilise one or more of WA’s iconic trails/trail networks, or trail destinations
- No live inventory

### Day Hiking and Walking Tours

None of the day tours identified in the audit, except for those offered by the Margaret River Discovery Company and Walk into Luxury, currently meet the definition of a “hero experience”.

- The Margaret River Discovery Company offers a quintessential Margaret River wine and coastal experience that includes a hike on the Cape to Cape Track and a canoe trip on the Margaret River.
- Walk into Luxury advertises a day hike on the Cape to Cape Track.

Hiking and walking tours offer the greatest diversity of experience domains (including wellness, wildflowers, wildlife, art, food and beverage, and nature appreciation). The exception to this are Aboriginal cultural tours, of which there are seven across the study region.

### Day Horse Riding Experiences

There are several horse riding experiences in the Perth, Peel and South West regions.

- Most offer trail riding on rural properties.

### Day Cycling and Mountain Biking Tours

A range of cycling tours are offered in the Perth, Peel and South West regions. Most utilise cycle paths or dual-use paths, and in some cases MTB trails. Several utilise electric bikes.

There are a range of experience domains on offer, including:

- Food and beverage tours
- Adventure tours

### Day Paddling and Aquatic Experiences

A diverse range of paddling and aquatic experiences are offered in the Perth, Peel and South West regions, including:

- Canoeing, kayaking (flat water and sea kayaking), and stand-up paddle boarding
- Coasteering, surfing and wild swimming



# EXPERIENCE STRENGTHS

The trail tourism product audit has identified existing experience strengths in hiking, as well as secondary and emerging strengths in cycling and aquatic experiences.

## Hiking is a Regional Experience Strength

The South West and Great Southern regions have well-established experience strengths in hiking (see Table 5). There are a significant number of multi-day hiking packages available that utilise two of the region’s iconic trails – the Cape to Cape Track and the Bibbulmun Track.

The Esperance region offers an exceptional hiking experience incorporating the iconic trails of the Fitzgerald River National Park. There is further scope to expand this experience offering.

There is emerging product growth in day hiking tours in the Perth, Peel and South West regions, although it is primarily limited to the intrastate market.

## Cycling is an Emerging Experience Strength

The South West and Great Southern regions have secondary experience strengths in cycle touring on the Munda Biddi Trail. There is opportunity to expand this offering.

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 an emerging strength in mountain biking.

## Aquatic is a Nascent Experience Strength

Although the entire study region is recognised for the quality of its aquatic experiences, there are no existing product that meets the definition of a “hero experience”. There is potential for trail tourism strength in this area.

Table 5: Regional Experience Strengths in Trail Tourism

LOCATION	HIKING	CYCLING	MTB	AQUATIC	HORSE
Perth	Development Opportunity		Emerging	Development Opportunity	
Peel	Development Opportunity		Emerging	Emerging	
South West	Emerging	Emerging	Development Opportunity	Development Opportunity	Development Opportunity
Great Southern	Emerging	Emerging	Development Opportunity		
Esperance	Signature				

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





Image Credit: Tourism Western Australia



# EXPERIENCE GAPS

The following discussion of experience gaps distinguishes between multi-day trail tourism products and day products.

## Multi-day Experience Gaps

Destination Trail Users are the primary market for multi-day products. Their travel decisions are often motivated by the desire to experience “bucket list” long trails (e.g. Cape to Cape Track, Larapinta Trail, Overland Track), and/or recognised trail destinations (e.g. Tasmania, New Zealand, Scotland).

While many Destination Trail Users are independent travellers who curate their own itineraries and manage all bookings, a significant proportion purchase multi-day inclusive guided or self-guided packages.

Multi-day products are usually booked many months ahead, with some popular trail tours requiring advance bookings of 12-18 months.

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.

## Hiking

The multi-day hiking tour market is well catered for in the study region. There are product offerings for the region’s two iconic trails – the Cape to Cape Track and the Bibbulmun Track – and three iconic trail destinations – the Stirling Range National Park, Torndirrup National Park, and the Fitzgerald River National Park.

Several tours also incorporate additional regional trails and trail destinations, including Rottne Island, Wellington National Park, Porongurup National Park, and Cape Le Grand National Park. However, there are no products incorporating Cape Arid National Park, which is a recognised regional trail destination.

The multi-day hiking tours offer a very similar experience, with little apparent product differentiation except for accommodation type and standard. However, there are a number of experience gaps:

- Lack of luxury tour product on the Bibbulmun Track, which is a nationally significant long trail
- Lack of tour product utilising dedicated trail lodge accommodation, which is a key feature of the “Great Walks of Australia” program marketed by Tourism Australia to the international destination trail user market
- Limited tour product incorporating the Bald Head Trail in Torndirrup National Park, which is a Western Australian iconic trail
- Limited glamping or unique accommodation options
- Lack of experience domains – most products focus on nature appreciation
- Lack of short tours (2 or 3 days)

## Cycling

There is a lack of multi-day cycle touring product in the region. Gaps include:

- No cycle touring product on northern sections of the Munda Biddi Trail, which is a national significant long trail
- No cycle touring product utilising Munda Biddi Trail shelters
- No self-guided tour options on the Munda Biddi Trail
- No cycle touring product that incorporates regional long trails such as the Wadandi Trail, Denmark-Nornalup Heritage Rail Trail, Collie Darkan Rail Trail, Railway Reserves Heritage Trail, and Waterous Trail
- No cycle touring product incorporating dedicated trail lodge accommodation, glamping or unique accommodation

## Mountain Biking

- There are no multi-day tour products for mountain biking enthusiasts

## Paddling

- Limited overnight canoeing tours
- No multi-day sea kayaking or rafting products

## Horse Riding

- Limited multi-day horse riding tours
- No multi-day horse tours utilising long-distance bridle trails such as the Warren Blackwood Stock Route

## Other Gaps

- Limited multi-day tours incorporating hiking and paddling
- No multi-day tours that incorporate cycling with other trail activities (e.g. hiking and cycling, or cycling and paddling)



Image Credit: Lenore Lyons, Concept 2 Strategy



# EXPERIENCE GAPS

## Day Experiences

While day tours are unlikely to be destination drivers for interstate and international visitors, they perform a several key functions:

- They can increase yield, spend and length of stay by providing add-on experiences for multi-day products. Trade-ready products can be packaged with multi-day experiences, or they can be booked separately.
- They can increase yield, spend and length of stay for independent Destination Trail Users who are unlikely to purchase multi-day tour product.
- They can encourage dispersal across the region.
- They can contribute to the density of experience offerings which supports reputation and awareness as a trail destination.
- They cater well to the needs of the Trail User While on Holiday market, and trade-ready products can support itinerary and package development by ITOs, Destination Management Companies (DMCs) and retail travel agents.
- They are well suited to PR, media and consumer direct marketing campaigns, thereby contributing to brand and destination awareness.

## Hiking & Walking

- Except for the Perth and Peel Regions, there are no day hikes on the Bibbulmun Track
- Except for Aboriginal cultural tours that incorporate short walks, there are no walking or hiking tours in the Great Southern and Esperance regions. This includes a lack of product incorporating iconic trails such as Bald Head and Bluff Knoll (Stirling Range National Park), and other regional trail destinations (Porongurup National Park, Fitzgerald River National Park, Cape Le Grand National Park).
- No trail running tours

## Cycling & Mountain Biking

- Except for a self-guided tour in Dwellingup, there are no day cycle tours on the Munda Biddi Trail
- There are no day cycle tours in the Great Southern or Esperance regions.
- Limited day tours on MTB trails

## Paddling & Aquatic Experiences

- No whitewater paddle experiences
- No flat-water paddle experiences in the Great Southern
- No paddle experiences in Esperance
- Limited stand-up paddle boarding experiences

## Horse Riding

- No horse riding tours in the Great Southern and Esperance regions

# CONCLUSION

The next stage of this project will consider these gaps and other opportunities in light of research into international best practice and case studies of unique trail tourism offerings in Australia and overseas.

This analysis will seek to identify new trail tourism experience development opportunities that could be adapted to Western Australia's unique sense of place.







Image Credit: Tourism Western Australia

