

ATTACHMENT B OPPORTUNITIES ANALYSIS

**South West Edge Trail Tourism
Experience Opportunities**



Concept *2* Strategy



Image Credit: Lenore Lyons, Concept 2 Strategy

ATTACHMENT B OPPORTUNITIES ANALYSIS:

South West Edge Trail Tourism Experience Opportunities

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.

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OVERVIEW

This document examines opportunities for new trail tourism experiences in the Perth, Peel, South West, Great Southern and Esperance regions of Western Australia.

Background

This trail tourism opportunities analysis draws on a trail tourism product audit and gap analysis completed in August 2023 for the Perth, Peel, South West, Great Southern and Esperance regions of Western Australia – see *Attachment A: Trail Product Audit*.

The gap analysis focused on the supply of tour products and experiences. It did not consider other supply gaps (e.g. events, trail infrastructure, trail services), or gaps in demand (e.g. trail tourism marketing activities or positioning) or capability (e.g. workforce skills and development).

The opportunities listed in this report include new products and experiences as well improvements to existing products to meet the needs of the trail user market.

The product opportunities identified in this report aim is to position Western Australia as a sought-after trail tourism destination, attracting interstate and international “Destination Trail Users”.

The information contained in this report may be used by Tourism Western Australia to assist tourism operators to develop new products and experiences and may inform a prospectus to help attract new operators and investment in trail tourism.



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Project Objectives

This report supports Tourism Western Australia's vision for destination development in the state's regional areas for the next 10 years.

It provides an understanding of the current state of trail tourism in the regions under study and identifies actions and priorities to support the sustainable management and growth of each destination.

In supporting this framework, the goal of this project is to identify trail tourism opportunities that:

- Could provide a positive return on investment for an operator
- Could be developed by a tourism operator
- Likely to align with the Department of Biodiversity, Conservation and Attractions' (DBCA) commercial operations licence guidelines
- Would be considered a **hero product** for an interstate/international visitor

Hero Experiences

Hero experiences are those 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 and represent where WA has a competitive advantage over other destinations
- Focus on what is unique, memorable and engaging about the destination

In other words, the focus is on identifying trail tourism experiences that have the potential to align with the region's brand proposition and become destination drivers for interstate and international visitors.

This approach acknowledges that while not all product gaps represent opportunities, a compelling trail destination needs to offer visitors a diverse range of trail products, services and experiences.

Therefore, in addition to the opportunities analysis, this report includes an appendix of other areas for product and service development.

APPROACH

Assessment Criteria

This project used five key criteria to identify trail tourism experience opportunities – distinctive destination; regional experience strengths; regional trail significance; trail activity market demand; and trail activity visitor segmentation (see Figure 1).

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 (e.g. glaciers, alpine peaks, waterfalls, volcanoes, giant forests, coastal spires).

They are also attracted by the natural and cultural stories of place – there is a strong desire to immerse themselves in the landscape and interact with its people. A distinctive destination manifests feelings of awe and wonder.

An exceptional natural and cultural landscape is therefore critical to attracting Destination Trail Users. While high quality, sustainable trail infrastructure is important, evidence from multiple popular trail destinations demonstrates that visitors are motivated by the opportunity to experience something different and special even when the trail itself is of poor quality.

Regional Experience Strengths

The focus area for this report is the Perth, Peel, South West, Great Southern and Esperance

regions. The report has considered each region's tourism experience strengths as identified through regional stakeholder consultation and documentary analysis.

Iconic Trails

In assessing the potential of each region to support trail tourism experiences, the project has prioritised development of the region's iconic trails and trail networks. The concept of an "iconic trail" is discussed in further detail in the next section.

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 (2022)* 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 (2021)*.

Figure 1.
Experience Opportunity Criteria



Report Structure

The report is organised into sections based on different trail activities – i.e. hiking, trail running, cycling, paddling, and horse riding. This approach provides for a more 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, a separate section on multi-activity experiences has been included at the end of the report.

Each activity section contains:

- **Overview section** - a definition and description of the activity, a review of market research, and a description of relevant visitor segments.
- **Product concept** – each proposed experience is described in the form of a product concept with details such as length (days/nights), location, trail/s, inclusions, market segment and market source.
- **Justification** – a short explanation drawing on market research, and the presence of high-quality trails or other tourism infrastructure.
- **Other opportunities** – other potential regions, locations or trails where the proposed experience could be offered. Not all experiences are suited to other locations. As well as exhibiting significant diversity in the quality and form of their trail infrastructure, the regions included in this report have different tourism experience strengths and are at different stages of maturity in tourism development. For this reason, the opportunities list refers to the region/s and trail/s that the experience is most likely to support or enhance.
- **Case Studies** – short case studies of existing trail tourism experiences delivered in other parts of Australia or internationally. These case studies might provide operators with a starting point from which to develop unique experiences that best capture the spirit of Western Australia’s culture, heritage and landscapes.

Limitations

The following caveats should be considered when assessing the proposed trail-tourism opportunities.

- **Feasibility analysis required** - the proposed experiences have not been subject to market testing. Feasibility analysis and detailed market research will be required before these products can be brought to market. This analysis should include any development or planning constraints or obstacles.
- **Operator availability** – 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.
- **Trail infrastructure** – 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. Off-piste products will require land manager support and approval.
- **Accommodation** – availability and suitability of accommodation to support multi-day experience offerings is a challenge in some areas and will require additional investment.
- **Support services** – availability of supporting services to enable packaged products is a challenge in most areas. This includes shuttle services, luggage transfer, and bike repair and maintenance. Provision of these services could form part an income diversification strategy for existing business owners or be the basis for new business development.

ICONIC TRAILS

This project is focused on identifying experiences that utilise Western Australia’s Iconic trails and trail networks.

Iconic trails and trail networks are the best trails of their type (see Box). The trail experience is exceptional, and the supporting infrastructure, services and facilities are of high-quality.

Iconic trails and trail networks align to the market positioning of the destination and reflect its strengths and key points of difference.

Iconic trails and trail networks have strong marketability. However, to attract the intended Destination Trail User, they must also be able to compete with trail experiences in other destinations. Iconic trails may fail to attract an intended market for a range of reasons, such as perceived value-for-money or travel time when compared to another trail.

Exceptional trail tourism products and experiences can play a critical role in overcoming these barriers. Therefore, the focus of this report is identifying trail tourism experiences that support the region’s iconic trails, trail networks, and trail destinations; and enhance and build the reputation of regional trails (see Table 1).



Iconic Trail Criteria⁶

One of the best trails of its type - Spectacular scenery and viewsheds; and located in a landmark location (e.g. World Heritage) or distinctive natural and/or cultural landscapes. Travels through a mostly natural area with the opportunity to showcase an important landscape or place. Some trails/trail networks will provide a special challenge or adventure; and/or cater to special interests.

Experience is aligned with state tourism and regional tourism brand promise

Quality infrastructure that is fit for purpose and built to industry best practice

Accessible to key target markets

Quality information (pre-trip, in destination and post-trip)

Effective and sustainable management

Supported by trail-based tourism product

Located in a recognised tourism destination (desirable)

Table 1. Trail Significance Categories⁶

Category	Description	Market
Iconic Trails	Iconic trails and trail networks have the highest marketability – i.e. these trails offer outstanding experiences that drive the highest visitation outcomes in terms of numbers, nights, dispersal and spend. They align with Western Australia’s brand positioning and can attract interstate and international visitors.	International Interstate Intrastate
Regional Trails	A trail or trail network that services the local community and attracts visitors from outside the region. Provides quality experiences that keep people in the region longer and attract users more familiar with the area or wanting less popular experiences.	Intrastate
Local Trails	A trail or trail network that services the local community and visitors for recreation, transport, health and wellbeing. Many are located close to residential areas. Recognised by locals as a popular trail/trail network and often have a high level of community connection (‘ownership’) and management.	Rarely a focus of tourism marketing

Western Australia’s Iconic Trails

Western Australia’s hiking and cycling trails, trail networks and trail destinations have been categorised using the criteria listed on the previous page. Other trail activities such as paddle trails and bridle trails have yet to be categorised using this criteria.

Hiking

There are two iconic hiking trails and several iconic trail destinations, supported by other regional hiking trails and trail destinations (see Table 2).

Table 2. Iconic and Regional Hiking Trails, Trail Networks and Trail Destinations within Study Region ⁶

Significance	Hiking Trails	Hiking Destinations
Iconic	<ul style="list-style-type: none"> • Cape to Cape Track • Bibbulmun Track 	<ul style="list-style-type: none"> • Stirling Range National Park • Torndirrup National Park • Fitzgerald River National Park
Regional	<ul style="list-style-type: none"> • Wadjemup Bidi (Rottnest Island) • Wiilman Bilya Trail (Wellington National Park) • Bald Head Trail (Torndirrup National Park) • Bluff Knoll Trail (Stirling Range National Park) • Hakea Trail (Fitzgerald National Park) • Cape Le Grand Coastal Trail (in National Park) 	<ul style="list-style-type: none"> • Porongurup National Park • Wellington National Park • Cape Le Grand National Park • Cape Arid National Park

Cycling

The Munda Biddi Trail has potential as an iconic trail. It provides a good off-road cycling experience but there are gaps in the quality of the trail infrastructure and a lack of trade-ready trail tourism product.

There are currently no Iconic Mountain Bike (MTB) trail networks in Western Australia. There are several regionally-significant MTB trail networks, however, on their own they lack sufficient marketability to appeal to international markets. However, if marketed as a collective experience, the “South West MTB Trails” have the capacity to attract an interstate market (see Table 3).

Table 3. Iconic and Regional Cycling Trails, Trail Networks and Trail Destinations within Study Region ⁶

Significance	Cycling Trails/Trail Networks	Cycling Destinations
Iconic (Potential)	<ul style="list-style-type: none"> • Munda Biddi Trail 	<p>South West MTB Trails</p> <ul style="list-style-type: none"> • Margaret River MTB Trails (Lead Experience – strong destination awareness) • Dwellingup Adventure Trails • Wambenger MTB Trails (Collie) • Nannup MTB Trails
Regional	<ul style="list-style-type: none"> • Calamunnda Camel Farm • Dwellingup Adventure Trails • Margaret River MTB Trails • Wambenger MTB Trails (Collie) • Pemberton MTB Park • Nannup MTB Trails 	

REGIONAL TRAIL FOCUS

Destination Perth

Location & Sub-regions

The Destination Perth tourism region encompasses the Perth Metropolitan area (including Rockingham, the Perth Hills, Swan Valley and Rottnest Island) and the Peel region.

This report focuses on the potential to activate trails and trail networks within the region’s key national parks and marine parks which are concentrated in the Perth Hills, Rottnest Island, and the Peel region.

In 2022, the Destination Perth region received 4.72 million overnight visitors who stayed a total of 24.6 million nights. Sixty-nine per cent of these visitors were intrastate, 23 per cent were interstate and 8 per cent were international visitors. These overnight visitors contributed \$5.35 million to the Perth economy.⁴¹

Trail Tourism Development Focus Areas

Table 4 provides an overview of trail tourism development focus areas for Rottnest Island, the Perth Hills and Peel region.

These trails/trail networks include the region’s two iconic trails – the Bibbulmun Track and Munda Biddi Trail – as well as regionally significant trail offerings.

Table 4. Trail Tourism Focus Areas in Perth and Peel Region

Significance	Rottnest Island	Perth Hills	Peel Region
Hiking	<ul style="list-style-type: none"> Wadjemup Bidi (Rottnest Island) 	<ul style="list-style-type: none"> Bibbulmun Track [Iconic] John Forest National Park 	<ul style="list-style-type: none"> King Jarrah Walk Trail, Lane Poole Reserve (Dwellingup)
Cycling	<ul style="list-style-type: none"> Rottnest Island cycle trails (Cycle) 	<ul style="list-style-type: none"> Munda Biddi Track (Cycle Touring) [Iconic] Railway Reserves Heritage Trail Kep Track 	
Mountain Biking		<ul style="list-style-type: none"> Calamunnda Camel Farm John Forest National Park (in development) 	<ul style="list-style-type: none"> Dwellingup Adventure Trails
Paddling & Aquatic	<ul style="list-style-type: none"> Rottnest Island coastline 		<ul style="list-style-type: none"> Murray River, Mandurah Estuary Murray River, Lane Poole Reserve
Horse Riding		<ul style="list-style-type: none"> Serpentine-Jarrahdale Equestrian Trails 	

Australia's South West

Location & Sub-regions

The Australia's South West (ASW) tourism region encompasses four sub-regions: Bunbury Geographe, the Margaret River Region, Southern Forests and Valleys, and the Great Southern.

In 2021-22, overnight tourism in Australia's South West was valued at \$2.18 billion. In 2022, the region welcomed 3.17 million overnight visitors, of which 91 per cent were intrastate visitors.⁴²

Trail Tourism Development Focus Areas

Table 5 provides an overview of trail tourism development focus areas in the Australia's South West region. These include the region's three iconic trails – the Cape to Cape Track, the

Bibbulmun Track and Munda Bididi Trail.

There are a diversity of regionally significant trail offerings across the Australia's South West region. These include purpose-built mountain bike trail networks that have been recently completed or are currently in development. These mountain bike networks incorporate downhill (gravity) and cross-country trails, and skills-development areas (such as jump lines or pump tracks). These are supported by several off-road cycle trails suited to mountain bikes and gravel bikes.

The region's coastlines, rivers and inlets also provide locally and regionally significant paddle experiences.

Table 5. Trail Tourism Focus Areas in Australia's South West

Trail Activity	Bunbury Geographe	Margaret River Region	Southern Forests & Valleys	Great Southern
Hiking	<ul style="list-style-type: none"> • Bibbulmun Track [Iconic] • Wiilman Bilya Trail (Wellington National Park) • Wellington NP (other trails) 	<ul style="list-style-type: none"> • Cape to Cape Track [Iconic] • Wadandi Track 	<ul style="list-style-type: none"> • Bibbulmun Track [Iconic] 	<ul style="list-style-type: none"> • Bibbulmun Track [Iconic] • Stirling Range NP [Iconic Destination] • Torndirrup NP [Iconic Destination] • Porongurup NP
Cycling	<ul style="list-style-type: none"> • Munda Bididi Track (Cycle Touring) [Iconic] • Collie Darkan Rail Trail 	<ul style="list-style-type: none"> • Wadandi Track 	<ul style="list-style-type: none"> • Munda Bididi Track (Cycle Touring) [Iconic] • Timberline Loop (Nannup) 	<ul style="list-style-type: none"> • Munda Bididi Track (Cycle Touring) [Iconic] • Denmark-Nornalup Heritage Rail Trail
Mountain Biking	<ul style="list-style-type: none"> • Wambenger MTB Trails (Collie) 	<ul style="list-style-type: none"> • Margaret River MTB Trails 	<ul style="list-style-type: none"> • Nannup Tank 7 MTB Park • Pemberton MTB Park 	<ul style="list-style-type: none"> • Valley of the Giants MTB Trail Network
Paddling & Aquatic	<ul style="list-style-type: none"> • Honeymoon Pool Kayak Trail (Wellington National Park) 	<ul style="list-style-type: none"> • Margaret River and coastline • Blackwood River 	<ul style="list-style-type: none"> • Kapagup-Nornalup Paddle Trails • Blackwood River and Donnelly River 	<ul style="list-style-type: none"> • Kapagup-Nornalup Paddle Trails • Torndirrup National Park & Albany rivers and coastline
Horse Riding	<ul style="list-style-type: none"> • Collie Darkan Rail Trail 		<ul style="list-style-type: none"> • Warren Blackwood Stock Route • Shannon National Park Bridle Trails 	<ul style="list-style-type: none"> • Denmark-Nornalup Heritage Rail Trail

Australia's Golden Outback

Location & Sub-regions

The Australia's Golden Outback (AGO) tourism region encompasses 54 per cent of Western Australia's landmass. The region stretches from Esperance in the south, through the Goldfields and Murchison in the north and out to the Gascoyne and Wheatbelt in the west.

This report is focused on the coastal region stretching from the Fitzgerald River National Park to Cape Arid National Park.

In 2021 and 2022, the Goldfields Esperance region welcomed an annual average of 741,000 total overnight visitors, staying 4.3 million nights and contributing \$552 million to the region's economy. Eight-seven per cent of visitors to the region were from Western Australia.⁴³

Trail Tourism Development Focus Areas

Table 6 provides an overview of trail tourism development focus areas in the Esperance and South Coast region.

The Fitzgerald River National Park is an identified iconic trail destination, providing two long trails with overnight camping experiences at the eastern (Hakea Trail) and western (Mamang Trail) ends of the park. The Hakea trail is the most accessible of these two trails, providing year round (all weather) sealed access and purpose-built camping facilities.

The region's other key national parks provide a diversity of hiking experiences.

Table 6. Trail Tourism Focus Areas in the Esperance and South Coast Region

Trail Activity	Esperance & South Coast Region
Hiking	<ul style="list-style-type: none"> • Fitzgerald River National Park [Iconic Destination] • Hakea Trail (Fitzgerald River National Park) • Cape Le Grand National Park • Cape Arid National Park • Great Ocean Walk and Cycle Trail
Cycling	<ul style="list-style-type: none"> • Great Ocean Walk and Cycle Trail

HIKING

Hiking is an activity that involves walking on a natural trail surface through a primarily natural landscape.

In Australia, the term “bushwalking” is often used instead of hiking. A range of other terms are used internationally, including walking, trekking, tramping, rambling, and strolling.

This report uses the following definition of “hiking tourism”:

Hiking tourism is a vacation or holiday-related outdoor activity that is undertaken on foot in natural and cultural landscapes. The walking activity may have a duration of over 30 minutes to any number of days. It may be undertaken for a range of reasons, including enjoyment, challenge, exercise and/or contemplation.¹

The United Nations World Tourism Organization (UNWTO) identifies the following benefits of hiking tourism: it encourages visitors to explore less visited areas, spend more and stay longer; it helps to overcome seasonality; it contributes to conservation of the natural environment; and it can promote enhanced interaction and understanding between residents and visitors.²

Market Potential

Recent market research commissioned by Tourism Australia – *Future of Global Tourism Demand* – reveals that one third of international travellers are interested in hiking or walking experiences. This interest is strong within all market segments – High Yield Travellers (35%), Luxury Travellers (30%), Long-Stay Travellers (37%) and Working Holiday Makers (42%).³

Table 7. Interest in Hiking across the Globe³

Market	Interest (%)	Rank out of 89 Experiences	Size ('000)
Global	33%	25	41,417
Germany	49%	3	2,738
France	43%	5	3,201
USA	42%	8	11,051
Canada	46%	8	2,874
Italy	48%	9	3,558
UK	37%	19	3,558
NZ	38%	23	284
Australia	37%	20	3,286

N.B. For this and other tables in this report, only markets where Tourism Australia and Tourism Western Australia are active have been included. For other markets, refer to the *Future of Global Tourism Demand* report.



The strongest interest comes from Western markets, particularly Germany, where nearly half of those surveyed were interested in this experience which ranks third in appeal out of 89 experience categories (Table 7).³

Interest in hiking is strongest amongst young singles/couples under 45 years of age (38%); and older singles/couples aged over 45 years (18%). Interest tends to be stronger amongst middle to high income earners.³

Amongst those interested in hiking, the strongest travel motivators are “getting into nature” (19%) and “exploration” (20%).³

Western Australia Visitation Data

Data on pre-COVID visitation to Western Australia reveals an interest in hiking amongst both domestic and international visitors. In 2019, 3,137,000 visitors undertook a bushwalk while in Western Australia.⁴

Nationally, Western Australia has the second highest percentage of domestic bushwalking visitors (14.4%), behind Tasmania (25.6%).⁴

The percentage of domestic visitors who bushwalk while on holiday is steadily increasing and represented 16.7 per cent of overnight visitors to WA in 2020.⁵ Australia’s South West receives most of the state’s domestic bushwalking visitors.

The United Kingdom is Western Australia’s top international market for bushwalkers, averaging around 33,000 per year or 19 per cent of the state’s international bushwalkers.⁵

Although smaller in total numbers, Swiss visitors are most likely to go bushwalking during their trip, with almost two-thirds (62.4%) of all Swiss visitors to WA participating in bushwalking.⁵

Hiking Visitor Segments

Western Australia’s key hiking visitor segments are described in Table 8.

The **Active Lifestyle Hiker** represents the largest segment within the **Destination Trail User Market**. Experiences targeted at this group have the potential to become destination drivers by encouraging interstate and international visitors to choose WA for their next hiking trip; and/or extend length of stay and spend of travellers who are already motivated to visit WA.

Luxury Walkers (High Yielding Travellers)

represent a small, high yield segment of the **Destination Trail User Market**. Experiences targeted at this group play an important role in destination and brand awareness by elevating domestic and international awareness of iconic trails.

Independent Hikers represent a small, low-yield segment of the **Destination Trail User Market**. The experiences identified in this report are unlikely to appeal to this market.

Leisure Walkers are the primary segment within the **Trail Users While on Holiday Market**. They represent the largest group of visitors by size and make up the bulk of current visitors who currently undertake a bushwalk while in WA. They are most likely to undertake self-guided hikes/walks but are attracted by compelling, unique day tour experiences.

Table 8. Western Australian Hiking Markets and Segments⁶

Visitor Segment	Description
Destination Trail Users	
Active Lifestyle	<p>Active lifestyle hikers are outdoor enthusiasts who will plan their visit to include the use of trails. They regularly participate in a range of outdoor activities such as hiking, cycling, or water sports, and are comfortable spending time in natural areas away from services.</p> <p>Time spent on trails is often half to full day or overnight stay. These hikes may require some forward planning.</p> <p>Many active lifestyle hikers possess intermediate to advanced hiking skills, have appropriate gear to suit conditions (e.g. backpacks, wet weather gear, boots), and have an above average level of fitness.</p>
Luxury Walkers	<p>Luxury Walkers are High Yield Travellers (HYT) seeking unique, exclusive, luxury experiences in areas of exceptional beauty. The 'bragability' (exclusivity) of the experience is a key motivator.</p> <p>Luxury Walkers have an average level of fitness and enjoy spending time in the natural environment. However, the quality of accommodation, food and beverages, and other services are critical when choosing a trail experience.</p> <p>Time spent on trails is 1-3 days, with a mix of half to full-day hikes. Other activities, including time for personal reflection/leisure, may be packaged into the trip. Preference is for trails that are not too strenuous so that walkers can socialise at the end of the day.</p>
Independent	<p>Independent hikers are adventurers who love being outdoors and consider it to be a very important part of their life. Many only feel free and at peace when they are immersed in wilderness.</p> <p>Independent hikers prefer hiking trails that are not overdeveloped or crowded. They view hiking as an opportunity to be removed from society and isolated in nature.</p> <p>Many independent hikers are looking for a hiking trail experience that is challenging, tough and demanding. Depending on the length and complexity of the hike, forward planning for food, water, shelter, emergencies, weather, route and other supplies may be required. They enjoy the process of planning their hike and it is one of their key motivators.</p>
Trail Users While on Holiday	
Leisure Walkers	<p>Holiday makers who seek out accessible trails for use with family and friends. They utilise trails as an activity on their holiday; as something they do in-between other activities or to access key sightseeing locations or points of interest (e.g. Castle Rock Skywalk).</p> <p>Time spent on trails is often short to half-day in duration.</p> <p>They often have limited trails experience and therefore prefer trails with good signage and maps; picnic tables and toilets; and accessible parking. They often travel as part of mixed-age groups or families with young children.</p>

Hiking Experience Opportunities

As outlined in the *Trail Product Audit Report*, the study region offers a diverse range of hiking experiences that appeal to the Destination Trail User and Trail User While on Holiday markets. The following proposed hiking tours have the potential to fill key niche product gaps.

01. Walking on Country	Elements	Description
<p>An immersive guided overnight hike that brings together stunning natural landscapes and ancient cultural knowledge.</p> <p>Join a 2-day guided hiking tour on the Bibbulmun Track learning about bush tucker, medicinal plants, and ancient traditions. This small group tour begins with a Welcome to Country and traditional smoking ceremony and is led by Aboriginal guides who share their knowledge of the world's oldest living culture.</p> <p>At the end of the day, camp overnight in a purpose-built campground with the custodians of the land. Sit around the campfire, listen to stories of the dreamtime written in the night skies and reconnect with nature and Country.</p>	Days/Nights	2D/1N or 3D/2N
	Length	8-12km per day
	Accommodation	Glamping
	Inclusions	Transfers; meals; trail snacks; accommodation
	Type	Guided
	Region/s	Perth & Peel South West Great Southern Esperance
	Trail/s	Bibbulmun Track Cape to Cape Track Wiilman Bilya Trail Stirling Range National Park Fitzgerald River NP
	Market Segment	Active Lifestyle
	Market Source	Domestic & International

Opportunity

Aboriginal tourism is a strategic priority for both Tourism Australia (TA) and Tourism Western Australia. *Discover Aboriginal Experiences* (DAE) is one of the eight collectives in the Signature Experiences of Australia program promoted internationally by TA.

Pre-COVID data shows that 1.4 million international visitors (17 per cent) participated in an Aboriginal and Torres Strait Islander tourism experience when visiting Australia in 2019, an increase of 8 per cent since 2014. For domestic travellers the figure was 1 million in 2019 (or 1 per cent), an increase of 12 per cent since 2014.⁷

The *Future of Global Tourism Demand* shows that Australia is the country most associated with authentic Indigenous experiences. Although awareness of Aboriginal experiences was found to be low across most international markets, as well as in Australia, appeal became evident when respondents were presented with specific Indigenous experiences and intention to engage increased substantially, indicating latent demand exists.³

There are currently no multi-day guided Aboriginal hiking experiences in Western Australia. There are several Aboriginal tour products that incorporate short walks. A review of Australian tour product has identified one multi-day Aboriginal hiking experience in Australia – the wukalina Walk based in Tasmania (see Case Study).

Although the experience is suitable for a range of iconic trails/trail destinations, there is significant opportunity to build on the brand recognition of the Noongar-named Bibbulmun Track and associated dreamtime story of the Waugal.

There may also be an opportunity to support the experience through the Camping with Custodians program by investment in unique accommodation.

Existing Aboriginal-owned business and tour guides could be supported to extend their current product offering to include an overnight experience.

02. Adventure Expedition Hike	Elements	Description
<p>On this guided trek you'll be carrying a full pack through the unspoilt wilderness of Western Australia's only sub-alpine mountain terrain. A 24 kilometre walk offers spectacular mountain climbs through a unique landscape</p> <p>This is a challenging bushwalk with long days, big, heavy packs and trying conditions. The terrain is very rugged and steep. There is no marked trail, no formal campsite and no water. This trip is recommended for people who are regular hikers and have a high level of fitness.</p> <p>A true wilderness hike, this trek is for those who enjoy a challenge and like to get off the tourist tracks and into the real backcountry. If you have a thirst for adventure and want to experience remote mountain hiking, then this is the perfect hiking adventure for you.</p>	Days/Nights	3D/2N
	Length	8-10km per day
	Accommodation	Camping
	Inclusions	Transfers; meals; trail snacks; hiking and camping gear
	Type	Guided
	Region/s	Great Southern Esperance & South Coast
	Trail/s	Stirling Range National Park Fitzgerald River National Park
	Market Segment	Active Lifestyle
	Market Source	Domestic & International

Opportunity

The Adventure Travel Trade Association estimated that in 2019, the international (i.e. outbound not including domestic travel) adventure tourism market was worth USD683 billion.⁸

One of the key drivers of increased demand for adventure tourism is increased urbanisation and digitalisation, resulting in consumers seeking active, authentic experiences that highlight natural and cultural values.⁹

The Adventure Tourism Development Index lists Australia in the Top Ten developed countries for adventure travel. This is a measure of strong potential for adventure tourism competitiveness. Iceland, Switzerland and New Zealand are ranked in the top three positions for developed countries, and Czech Republic, Chile and the Slovak Republic ranked in top three for developing countries.¹⁰

The *Future of Global Tourism Demand* report found that approximately one quarter of Out of Region Travellers are interested in trekking/camping, with the strongest interest amongst Walking Holiday makers (37%). Interest is strongest amongst Young Singles/Couples (Under 45) at 39 per cent; and young families (34%).³

There is strong affinity between this activity and hiking (58%) and mountain rock sports (41%).

The highest interest in trekking/camping comes from France (25%), South Korea (25%), India (34%) and New Zealand (25%).

Similarly, around 21 per cent of Out of Region Travellers are interested in mountain or rock sports, with higher interest among Working Holiday Makers (37%) and those in the younger demographic (Young Singles/Couples and Young Families, both 38%). The strongest affinity with other experiences is trekking/camping at 46 per cent.

Strong interest comes from India (35%), China (22%), Malaysia (26%) and Germany (20%).

There are currently no expedition hikes on offer in Western Australia. The proposed Stirling Range Ridge Traverse is a technical hike requiring a high level of fitness and guides with expedition experience in remote locations. The Ridge Walk is gaining in popularity as a self-guided experience with the intrastate market and would appeal to more adventurous travellers with limited experience hiking in remote locations.

There is also potential for an expedition hike through the Fitzgerald River National Park (incorporating the Mamang Trail and Hakea Trail), pending DBCA approval.

CASE STUDY

wukalina Walk (Tasmania)

wukalina Walk is a 4-day/3-night Palawa-owned-and-led guided experience involving cultural activities, bush tucker and traditional foods in the magnificent landscape of wukalina (Mt William National Park) and Irapuna (Bay of Fires) in North-East lutruwita (Tasmania).

Guests sleep in an architecturally-designed standing camp, Krakani Lumi (resting place), in unique domed-ceiling huts set within coastal heathland. The third night is spent in a beautifully repurposed and restored lightkeepers cottage at the most northern end of Irapuna (Bay of Fires).

Involves two main days of hiking and a day dedicated to sharing some of the cultural practices that connect First Nations peoples to their Ancestors, such as shell-stringing and clapstick making. Walk departs Launceston from September to May.

PRICE: \$2,895pp twin-share.

WEB: www.wukalinawalk.com.au



Domed ceiling huts.
Image Credit: Tourism Australia
[<https://www.australia.com/en/things-to-do/aboriginal-australia/discover-aboriginal-experiences/exclusive-accommodation.html>]

CASE STUDY

South Coast Track (Tasmania)

The South Coast Track walking adventure is a 9-day (65km) trek from Melaleuca on the south-west coast of Tasmania to Cockle Creek. It involves trekking in remote areas for up to 8 to 10 hours a day (10-15km), possibly more, over rugged and varied terrain. The tracks are long, rough and very steep. Expect creek and river crossings that could be waist-deep. Plenty of mud, slippery surfaces, steep tracks and fallen trees while carrying a full pack.

With remoteness comes potential to encounter variable weather conditions. Guests need an excellent level of fitness, be prepared to carry a full pack weighing up to 20kgs and be completely comfortable in adverse weather conditions and remote locations where evacuation may be very difficult.

Includes flight to Melaleuca from Hobart.

PRICE: \$4,195pp 2-person shared tent.

WEB: www.worldexpeditions.com



Creek crossing.
Image Credit: World Expeditions
[<https://www.tasmanianexpeditions.com.au/Trekking-with-a-Full-Pack/South-Coast-Track>]

03. Bibbulmun Track Luxury	Elements	Description
<p>On this guided walk you'll discover the highlights of the renowned Bibbulmun Track on the south coast of Western Australia. Be mesmerised by giant ancient forests and stunning remote coastlines. Our passionate, knowledgeable guides share the history of the land and introduce you to its incredible biodiversity.</p> <p>Each night of your epic walk 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.</p> <p>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.</p>	Days/Nights	4D/3N
	Length	5-10km per day
	Accommodation	Unique Accommodation
	Inclusions	Transfers; premium food and beverages; wellness activities (e.g. yoga, forest bathing); accommodation
	Type	Guided
	Region/s	South West Great Southern
	Trail/s	Bibbulmun Track
	Market Segment	Luxury Walkers
	Market Source	Domestic

Opportunity

There are currently no luxury hiking experiences on the Bibbulmun Track which is one of Western Australia's iconic hiking trails.

Incorporating wellness activities would also resonate with the luxury market. The *Future of Global Tourism Demand* found strong interest in wellness experiences amongst Luxury Travellers (31%).³

This product would be ideally suited to the Great Walks of Australia program, which is part of Tourism Australia's Signature Experiences of Australia. The Cape to Cape Track is part of this program via Walk into Luxury.

To be part of the Great Walks program, commercial operators must provide guided multi-day adventures with a "sense of exclusivity and outstanding food and wine [combined with] remote wilderness locations".

The criteria include being within a 1 hour's drive of a major airport, "luxury" accommodation (can include glamping), excellent quality prepared meals, drinks, and guides/pick-ups.

This product would showcase the south coast portion of the trail (Walpole to Denmark) which offers the most exceptional viewsheds and diversity of landscapes and vegetation. This area is within one hour of Albany regional airport. Consideration should be given to sub-branding for this section

of the Bibbulmun Track to address consumer perceptions about length and challenge.

This experience requires purpose-built unique accommodation. There are multiple tour operators with products suited to this experience, however, they are currently reliant on 3-star or camping accommodation options.

To elevate the Bibbulmun Track to the Great Walks program would require existing operators to be paired with high-quality accommodation.

While in-park accommodation provides for walk-in/walk-out style products, off-park accommodation with shuttle services may be a quicker way to bring this product to market. There are several examples of Great Walks products that use off-park accommodation with daily transfers (see for example the Great Ocean Walk).

An alternative concept would be to incorporate unique accommodation in an unusual setting (e.g. such as a houseboat on the Blackwood River).

There may also be an opportunity to develop luxury walking packages for the Stirling Range/ Porongurup National Parks, Fitzgerald River National Park, and Cape Le Grand National Park. This will require investment into high quality accommodation and a focus on local (or WA) food and beverage.

TRAIL RUNNING

Trail running is an activity that involves running in natural environments on formed trails.

Trail runners typically utilise hiking trails and firebreaks. Some mountain bike parks also permit trail running on MTB trails, usually for events or on a rotation basis with cyclists.

Market Potential

The *Future of Global Tourism Demand* report reveals that just over ten per cent of international travellers are interested in trail running experiences (Table 9). This interest is strongest amongst Luxury Travellers (15%), Long-Stay Travellers (14%) and Working Holiday Makers (21%).³

Table 9. Interest in Trail Running across the Globe³

Market	Interest (%)	Rank out of 89 Experiences	Size ('000)
Global	12%	88	14,400
Hong Kong	16%	75	197
Canada	15%	77	939
South Korea	11%	80	1,094
India	18%	81	668
USA	14%	84	3,675
Singapore	12%	85	192
Italy	11%	85	330
Australia	10%	87	913

The report notes that trail running is a niche experience, ranking towards the bottom of the 89 experiences tested across all markets. Interest is skewed towards younger travellers, particularly men.³

There is very little published research on trail running visitation trends. However, event data provides one indicator of its popularity. Events are a significant element within the industry. The International Trail-Running Association (ITRA) has reported that the sport experienced significant growth since 2020 with an estimated 20 million trail runners worldwide and 12 per cent growth per annum since 2010.¹¹

ITRA states that there are nearly 10,000 trail running events around the globe. It reports that although trail runners are mostly men (77%), there has been a 45 per cent increase in the number of women competing since 2015. The average age is 40 years old, and dropping, with 90 per cent aged between 25-55 years.¹¹

Trail running is increasing in popularity in Australia and internationally.¹² A 2018 survey of West Australians found that there were equal numbers of men and women, and that 23 per cent of trail runners were aged 45-54.¹²



Trail Running Experience Opportunities

As outlined in the *Trail Product Audit Report*, there are no trail running tours in the study region. The following proposed trail running tours have the potential to address key niche product gaps.

04. Trail Running & Wellness Retreat	Elements	Description
<p>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. Enjoy the peace and tranquillity of a picturesque karri forest as you explore the coastal hinterland trails.</p> <p>Off-track you'll be pampered and rejuvenated at a luxurious retreat. Your fully-inclusive package includes healthy wholefood breakfasts and lunches. At the end of the day, enjoy a fabulous dinner of local produce and wine, and indulge in a range of spa treatments.</p> <p>You'll be running 3-4 hours per day on a mixture of sand and gravel trails, as well as sections of beach. On some sections, you'll be running uphill and downhill on natural surfaces, with vertical climbs of 200-500m.</p>	Days/Nights	5D/4N or 4D/3N
	Length	40-60km per day
	Accommodation	5-star
	Inclusions	Transfers; meals; trail snacks; accommodation
	Type	Guided
	Region/s	South West Great Southern
	Trail/s	Cape to Cape Track & Boranup Forest Bibbulmun Track & Bald Head
Market Source	Domestic International	

Opportunity

There is a growing link between outdoor recreation activities and wellness tourism. Wellness travel activities include experiences that promote mental, physical and emotional well-being, such as yoga and meditation, spa treatments, forest bathing, and healthy food.

The *Future of Global Tourism Demand* report reveals that over a quarter of Out of Region travellers are interested in wellness retreats. This experience represents a strong yield opportunity, attracting audiences with higher incomes. The market skews heavily female, and younger age groups (under 40). This interest is strongest amongst Luxury Travellers (31%), High Yield Travellers (29%) and Working Holiday Makers (38%).³

The report reveals that transformation is a motivation for travel. Trail running sits within the top ten other experiences for which there is a strong affinity (18%).³

Wellness tourism and travel has been growing in popularity over recent years, and the impacts of COVID-19 have only increased its popularity further. Thinking about the impact of COVID-19 on travel preferences and behaviour, 16 per cent of Sydney and Melbourne residents and 22 per cent of Perth residents agree they now prefer a wellness holiday.¹³

There is an opportunity to combine multi-day trail running tours with a range of wellness experiences in the Margaret River region utilising the Cape to Cape Track and local trails in Boranup Forest. With the development of accommodation and a day spa at The Dam in Denmark, there may be an opportunity to utilise the Bibbulmun Track, WOW Trail, and Bald Head trail to create a similar experience in Denmark.

The proposed Trail Running and Wellness Retreat is well suited to development as a women-only experience. Women-focused travel is growing, with the emergence of specialised adventure tour companies and products led by local female guides.¹⁴ Part of this interest in women-only tours is fuelled by the rise in women's solo travel.¹⁵

There is an opportunity to capitalise on the growing levels of female participation in trail running, female interest levels in wellness travel, and the rising number of women-only adventure tours to create a trail running experience that incorporates wellness products and a focus on high-quality, healthy cuisine.

CASE STUDY

Dolomites Trail Running & Wellness Retreat (Italy)

Be prepared for some of the most breathtaking trails you've ever run (due to their beauty and elevation) while being pampered in some of the most luxurious four-star hotels of Sud-Tyrol. You'll run the trails of the Pale Mountains, as the Dolomites are known, a UNESCO World Heritage Site preserved for its stunning natural beauty with an amazing group of women who, like you, run because of how it makes them feel: strong, calm, enchanted and free.

Includes accommodation, meals, trail guide, local escort, luggage transfers.

PRICE: \$4,800pp

WEB: www.holimites.com/en/sport-packages/trail-running-wellness-retreat-048



Image Credit: Holimites.
[<https://www.holimites.com>]

CASE STUDY

Trail Running Pilgrimage (USA)

Are you curious about mindfulness and how running and time in nature can enhance your life? These trips focus on mindfulness, sunrises and star-filled nights, coupled with running efforts that make you work for it but leave you feeling vibrant and refreshed for good conversations and meaningful time together in beautiful destinations.

We choose places and trails that are beautifully coupled with mindfulness practices, inspiring text and poetry, body awareness, yoga, meditations, pilgrim passports, and journaling to help you grow as a runner.

Join our pilgrim guides as we open ourselves to place, adventure, conversations, and community. Expect to have a good effort on the trails each day that leaves you ready to enjoy the group and place the rest of the day. 6-15 mile efforts per day with luxury accommodations.

PRICE: \$4,700pp

WEB: www.thresholdexpeditions.com/tx-pilgrim-mindfulness-awareness



Image Credit: Threshold Expeditions.
[<https://www.thresholdexpeditions.com>]

05. Hill Running Adventure	Elements	Description
<p>Run the highest peaks in the south west of Western Australia on an iconic multi-day trail running route that includes the stunning peaks of the Stirling Ranges, Porongurups and Mt Hallowell.</p> <p>Dramatic mountains and stunning views are around every corner. Most of these trails are linear (point-to-point), on rugged tracks that involve scrambling and some climbing. You'll certainly get a work-out, and the immense satisfaction of tackling the region's wild landscape.</p> <p>Although each trail distance may be short (6-12km), the terrain cannot be underestimated. You will need to have a high level of fitness, and prior experience trail running.</p>	Days/Nights	5D/4N or 4D/3N
	Length	20-30km per day
	Accommodation	Camping
	Inclusions	Transfers; meals; trail snacks; accommodation
	Type	Guided
	Region/s	Great Southern
	Trail/s	Stirling Range National Park Porongurup National Park Mt Hallowell (Bibbulmun Track) Mt Lindesay Trail
Market Source	Domestic International	

Opportunity

The *Future of Global Tourism Demand* report reveals that ten per cent of Out of Region travellers are interested in mountain or rock sports. This audience skews younger (particularly under 30) and is aligned with nature-based and adventure travel. This interest is strongest amongst Long Stay Travellers (28%) and Working Holiday Makers (37%).³

Some of the strongest interest comes from South and South East Asian markets, including India (35%), China (22%), and Malaysia (26%). Trail

running sits within the top ten other experiences for which there is a strong affinity (21%).³

The Great Southern offers some of the only mountain hiking in Western Australia, including the only sub-alpine climate in the state. The proposed Hill Running Adventure caters to the adventure-end of the trail running market.

There is also an opportunity to develop this experience into an ultra trail running event, incorporating other trails/road systems within the region.

CASE STUDY

Tour du Mont Blanc (France)

One of the world's toughest 100 milers, the Ultra Trail du Mont Blanc (UTMB), circumnavigating the highest mountain in the Alps, Mont Blanc at 9,000m and passing by its 71 glaciers and 400 summits.

This is a great running adventure to sign up for if you want to explore the Alps more or to recce the route for the UTMB. As always you will have a Lead Runner with you, refreshment points, logistic support as well as food and accommodation provided.

The scenery is absolutely stunning and you'll experience some of the most breath taking views of Mt Blanc the area has to offer. It's broken down into 6 stages with a day to relax in Chamonix at the beginning and end of the trip.

PRICE: \$4,800pp

WEB: www.gorunningtours.com/run/europe-tour-du-mont-blanc/



Image Credit: Go Running Tours.
[<https://www.gorunningtours.com>]

CYCLING

Cycle Tourism involves travelling for the purpose of participating in cycling. The following definition of cycle tourism has been developed specifically for the Australian context:

*Trips involving a minimum distance of 40 kilometres from a person's home and an overnight stay (for overnight trips), or trips involving a minimum non-cycling round trip component of 50 kilometres and a minimum four-hour period away from home (for day trips), of which cycling, involving active participation or passive observation, for holiday, recreation, leisure and/or competition, is the main purpose for that trip. Participation in cycling may include attendance at events organised for commercial gain and/or charity (competitive and non-competitive), as well as independently organised cycling.*¹⁶

While most definitions of cycle tourism include people who travel for passive observation of cycling events and competitions, this report focuses on active participation (i.e. people who ride a bike).

Market Potential

Tourism Research Australia (TRA) data on domestic travel in 2019, found that 2.2 per cent of domestic overnight visitors went cycling.

This equated to 2.6 million overnight trips at an average of 4.4 nights per trip (or 11.3 million bed nights). In addition, Australians took almost 2 million day trips involving cycling.¹⁷

Holiday travel was the largest driver, accounting for 68 per cent of cycling trips; followed by those visiting friends and relatives (24%). Most of these trips (78%) occurred in regional Australia.¹⁷

For the period 2015-2017, 351,700 overnight visitors to Western Australia undertook cycling while on their trip. Fifty-seven per cent of these were intrastate visitors; and another third were international visitors.¹⁸

Prior to the COVID-19 Pandemic, Western Australia witnessed a significant increase in the numbers of visitors undertaking cycling activities. In 2018 and 2019 the figures were 692,000 and 680,000 respectively.⁵



The *Future of Global Tourism Demand* report reveals that a quarter of Out of Region Travellers are interested in cycling experiences. Germany rates the highest level of interest (37%), followed by countries in East and South East Asia, and India (see Table 10).

This interest is strongest amongst Luxury Travellers (29%), Long-Stay Travellers (28%) and Working Holiday Makers (40%).³

Those interested in cycling tend to be younger, particularly young families, with a skew towards males.³

Amongst those interested in cycling, the strongest travel motivators are “getting into nature” (19%), “adventure” (16%) and “exploration” (17%). There is a strong affinity with trekking/camping (39%), mountain/rock sports (34%) and a range of other nature-based experiences.³

Table 10. Interest in Cycling across the Globe³

Market	Interest (%)	Rank out of 89 Experiences	Size ('000)
Global	25%	52	29,519
Germany	37%	17	2,094
Indonesia	41%	21	556
China	26%	27	7,601
India	35%	33	1,276
Japan	23%	36	1,837
Malaysia	30%	43	502
UK	22%	53	2,159
Australia	16%	78	1,401

Road cycling (68%) attracts stronger appeal than mountain biking (50%), with some travellers interested in both.

Cycle Tourism - Activities & Disciplines

Road Cycling

In Australia, road cycling refers to riding on paved roadways on bicycles built for speed racing. Internationally road cycling events attract large numbers of spectators (e.g. Tour de France).

In 2022, 466,000 Australians participated in track or road cycling. This represents 17 per cent of the population who participated in cycling (2.2 million).¹⁹

The Future of Demand noted that 17 per cent of Out of Region Travellers are interested in road cycling, with interest strongest amongst Working Holiday Makers (26%). Interest is highest in Germany, followed by a number of Eastern markets. Those interested in cycling tend to be younger, particularly young families, with a skew towards males.³

This data mirrors the overall results for cycling, reflecting the higher interest in road cycling (68%) amongst all Out of Region Travellers.

It is important to note, however, that the meaning of “road cycling” differs in other national contexts. It may refer to recreational cycling on roads, which is commonplace in many countries, but increasingly less common in Australia due to factors such as high road speeds, narrow road shoulders, and negative attitudes towards cyclists from other road users.

Interestingly, the image used to accompany *The Future of Demand Road Cycling Fact Sheet* is a cyclist riding on a purpose-built cycle path in an urban environment (i.e. not on-road cycling). In this report, the term “recreational cycling” is used to describe this form of cycle activity.

Mountain Biking (MTB)

Mountain biking is defined as:

*Cycling off-road on a variety of unsealed surfaces, typically through a natural setting. Mountain biking is a diverse activity that can be enjoyed almost anywhere from a backyard to a gravel road, as well as purpose-built trails.*¹⁶

The term covers a range of disciplines and activities that use an off-road bicycle. *The Western Australian Mountain Bike Strategy 2022-2032* describes eight mountain bike styles based on the type of trail that is used (see Table 11).²⁰

Some mountain bike riders have a preference for one style of riding over another and may describe themselves as primarily “downhill (gravity) riders”, “cross-country riders”, or “gravel riders”; while others enjoy riding on a range of trail types. Importantly, not all cyclists who ride a mountain bike see themselves as “mountain bikers”.

Mountain biking is considered one of the fastest growing recreational activities globally. AusPlay survey results estimate that approximately 330,100 Australians participated in mountain biking in 2022 (approximately 1.5% of the population).²²

A 2021 study of mountain biking trends nationally found that participation is generally skewed towards males (80%), with female participation generally sitting between 13-25% across different states and territories; and one-third of mountain bikers are aged between 40-49 years.²³

The *Future of Global Tourism Demand* noted that 13 per cent of Out of Region Travellers are interested in mountain biking, with interest strongest amongst Working Holiday Makers (23%). Interest is highest in Indonesia, followed by a number of Eastern markets. Those interested in cycling tend to be younger, particularly young families, with a skew towards males.³

Cycle Touring

Cycle touring is a form of cycle tourism in which riding a bicycle is the primary form of transport. It includes both on-road and off-road routes over multiple days.

Cycle touring itineraries include on-road routes through country towns and villages; long-distance rail-trails; as well as remote adventure trails that incorporate huts or camping.

There are a range of cycle touring products that cater to cyclists with different skill levels and interests, including fully catered “inn-to-inn” tours where luggage is transported ahead to the next town; and independent back-country cycling requiring the use of panniers or trailers to transport clothing, food and camping gear.

Recreational Cycling

In the context of cycle tourism, “recreational cycling” covers a broad range cycle experiences that do not involve the use of specialised bikes or require technical skills or knowledge.

Recreational cycling may occur on a range of surfaces and trail types: It includes riding on off-road paved and natural surfaces such as purpose-built cycle paths, rail trails, gravel roads and firebreaks, as well as on-road cycle lanes and paved roadways.

Recreational cyclists come from a wide variety of backgrounds, ages and skill levels. In Australia, cycling participation rates have been growing steadily since 2019. In 2022, 2.2 million Australians participated in cycling.¹⁹ A national survey conducted in 2021 found that approximately 18.2 per cent of Australians rode a bicycle (including e-bicycles) in the week prior to the survey and 40.3 per cent rode a bike over the previous year.²¹

Recreational cyclists seek out a range of cycling experiences while on holiday. They are motivated by opportunities to interact with locals, immerse in nature, and learn about a destination’s flora, fauna, history and culture.

Table 11. Western Australian Mountain Bike Styles²⁰

Trail Type	Description
Cross Country	Primarily single-track orientated with a combination of climbing and descending, and natural trail features of varying technicality. Cross Country trails appeal to the majority market and can cater for timed competitive events. Typically bikes are lightweight with shorter travel dual suspension or have no rear suspension.
All Mountain / Enduro	Similar to Cross Country and primarily single-track orientated, with greater emphasis on technical descents, with non-technical climbs. All Mountain trails can cater for timed competitive events (Enduro). All mountain trails may use uplift to the trailhead where appropriate. Bikes are typically light to medium weight with medium-travel dual suspension.
Downhill	Purely descent-only trails with emphasis on steep gradients for speed and technical challenge with a focus on skill development. These trails can cater for timed competitive racing. Downhill trails typically appeal to the more experienced market. However, green (easy) downhill trails are emerging to cater for all experience levels. Downhill trails usually require uplift to the trailhead via chairlift or vehicle shuttling. Bikes are designed for descending, built for strength over weight and typically long-travel dual suspension.
Freeride	Typically descent-focused trails with emphasis solely on technical challenge and skill development. Trails feature both built and natural terrain technical features with a focus on drops and jumps. Appeals to the more experienced market and caters for competitions judging manoeuvres and skills only. Bikes are typically medium to long travel dual suspension and are built for strength.
Park	Built feature environment with emphasis on manoeuvres, skill development and progression. Appeals to wide market including youth and can cater for competitions judging aerial manoeuvres. Can include jump tracks, pump tracks and skills parks. Typically dirt surfaced but can include hardened surfaces. Bikes are typically built for strength, with short travel suspension.
Touring	Typically long distance riding on reasonably uniform surface conditions and lower grades. Touring trails are dual direction linear trails or long distance circuits with a focus on reaching a destination. Touring trails can include rail trails, access/fire roads and single track. While there is a limited market for long distance mountain biking, touring trails can be ridden in sections making them accessible to all. Bikes may be carrying panniers or towing trailers, and are usually robust with limited suspension. However, for short sections or day trips most mountain bikes are suitable.
Gravel	While not a new concept, the popularity of gravel riding has increased significantly in recent years. It is typically conducted on gravel or unsealed roads or paths and can be considered as bridging the gap between traditional road riding and mountain biking combining the higher speed and efficiency of road cycling with the capability to ride on rough and loose terrain. While traditional mountain bikes can be used for gravel riding, specialised bikes have become popular in recent years and typically feature a drop bar bike with clearance for bigger tyres and a more relaxed comfortable geometry.
Cyclocross	Cyclocross is a growing discipline of cycling which provides off-road riding opportunities over a short course predominantly on natural surfaces such as grass, mud and sand. Races are conducted over multi-laps and can be conducted in a variety of settings where there is access to off-road terrain.

Cycling Visitor Segments

Western Australia’s key cycling visitor segments are described in Table 13 (see over).

The **Active Lifestyle Cyclist** is the largest segment within the **Destination Trail User Market**. Experiences targeted at this group have the potential to become destination drivers by encouraging interstate and international visitors to choose WA for their next cycle trip.

Adrenaline Seekers represent a small segment of the **Destination Trail User Market**. Experiences targeted at this group play a role in destination and brand awareness.

Independent Adventurers represent a small, low-yield segment of the **Destination Trail User Market**. The experiences identified in this report are unlikely to appeal to this market.

Leisure Riders are the primary segment within the **Trail Users While on Holiday market**. They represent the largest group of visitors by size and make up the bulk of current visitors who cycle while in WA.

Interest in particular cycling activities or disciplines varies within each of these segments (see Table 12).

The opportunity to develop cycle tourism experiences that cater to the needs of these visitor segments is highly dependent on the quality, accessibility and uniqueness of the cycle trail, trail network, route or itinerary.

Table 12. Western Australian Cycle Visitor Segments by Cycle Activities

Visitor Segment	Trail Experiences
Active Lifestyle Cyclists	Cross-country & All Mountain MTB Trails Gravel Riding Cycle Touring Recreational Cycling
Adrenaline Seekers	Gravity & Freeride MTB Trails
Independent Adventurers	Cycle Touring (Road or MTB)
Leisure Riders	Recreational Cycling

Table 13. Western Australian Cycle Markets and Segments⁶

Visitor Segment	Description
Destination Trail Users	
Active Lifestyle	<p>Active lifestyle cyclists are outdoor enthusiasts who will plan their visit to include a cycling experience. They own a hybrid bike, mountain bike and/or e-bike and ride regularly. They regularly participate in a range of outdoor activities such as hiking, cycling, or water sports, and are comfortable spending time in natural areas.</p> <p>Active lifestyle cyclists are intermediate to advanced riders with a good understanding of the basics of cycling, they own their own bike and know their limits.</p> <p>The seek out well-designed and marked trails with associated facilities such as equipment hire/repair, safe parking, nearby access to accommodation, food and beverage facilities, shuttle services. They may seek out guided and/or packaged experiences when travelling to new destinations.</p>
Adrenaline Seekers	<p>These are highly-skillful, technical-focused riders who seek challenging trails and are often members of cycle clubs. They are generally, like to participate in competitions and events, or compete against themselves on increasingly difficult and technical trails.</p> <p>Adrenaline seekers have a high fitness and are willing to seek less accessible trails.</p> <p>Adrenaline seekers are primarily mountain bike riders and gravel riders, who seek out specific trails with the highest classifications and/or technical features for their discipline.</p>
Independent	<p>Independent cyclists are skillful riders and outdoor enthusiasts, who ride frequently, as often as once a week. They often participate in other outdoor activities.</p> <p>Independent cyclist enjoy planning their own rides which are frequently overnight or multi-day rides. They ride a variety of trail classifications</p> <p>Independent riders are more motivated by an adventure then the technicality of a ride. This group includes off-road mountain bike riders, road cyclists and gravel riders.</p>
Trail Users While on Holiday	
Leisure Riders	<p>Leisure Riders are typically holiday makers who seek out unique outdoor activities for use with family and friends. They cycle as an activity on their holiday, but it is not the motivator behind their trip.</p> <p>Time spent on trails is often short – 1-2 hours in duration.</p> <p>They may ride very rarely and therefore prefer trails with good signage and maps; picnic tables and toilets; and accessible parking. They often travel as part of mixed-age groups or families with young children.</p>

Mountain Biking Experience Opportunities

As outlined in the *Trail Product Audit Report*, there is a lack of multi-day cycling experiences in the study region. The following proposed mountain biking tours have the potential to address key product gaps.

06. Multi-day Single Track MTB Tour	Elements	Description
<p>Spend a week exploring Western Australia'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.</p> <p>Start by sampling the infamous Camel Farm in the Perth Hills with over 50km of single-track to choose from. We then move on to the stunning Dwellingup MTB Trails, including "The Roost" on top of the descending trails overlooking the Murray Valley.</p> <p>Next stop the Wambenger (Collie River Valley) MTB Trails, with three mountain bike networks to choose from, you'll be spoilt for choice. Then, WA's newest trail network - Nannup Tank 7 MTB Park - awaits. Your adrenaline journey ends in Margaret River at the Woodjitup Trails (aka Compartment 10) and a well-deserved brew or two overlooking the ocean.</p>	Days/Nights	6D/5N
	Length	3-5 hours per day
	Accommodation	3-star
	Inclusions	Transfers; meals; trail snacks; accommodation
	Type	Escorted (solo riding)
	Region/s	Perth Peel South West
	Trail/s	Camel Farm Dwellingup MTB Trails Wambenger MTB Trails Nannup MTB Trails Margaret River MTB Trails
	Market Segment	Adrenaline Riders
	Market Source	Domestic International

Opportunity

Western Australia's distance from eastern state visitor markets is a barrier for some consumers choosing their next mountain bike adventure because it adds time and cost to a trip. Most of WA's MTB trail networks are located several hour's drive from Perth, further compounding this challenge.

One way to address this barrier is to package up a week's riding to enable visitors to sample the best WA has to offer. An escorted package that literally takes care of "everything" (transfers, bike hire or bike builds, meals, accommodation, coffee breaks, and a sample of local beverages) takes the hassle and time out of planning a trip, allowing the customer to focus on enjoying what they love doing - shredding the trails.

While research suggests that most mountain bikers travel independently rather than as part of an organised tour, an escorted trip can be appealing to those with limited time to both plan and experience the trails. Making a virtue of "hassle free" and emphasising the social aspects of group travel (a recognised element of MTB culture), could make WA an attractive travel destination for both domestic and international travellers.

The inclusion of the Margaret River MTB Trails is strategic. While this trail network does not provide the epic riding experience of other trail destinations, it offers strong brand and destination awareness that appeals to key MTB demographics - particularly around coastal lifestyle, surf culture, and food and beverage.

Importantly, it also allows for flight departures via Busselton-Margaret River Airport to Melbourne or Sydney, thus reducing the time needed to travel within region to connect to interstate flights. The proposed itinerary outlined above could include pick-up from Perth, with a departure from Busselton for East Coast visitors.

The inclusion of heli-shuttle services between trail destinations may provide a "wow-factor" element to this experience.

There may be an opportunity to develop a "partner's package" alongside this product, with tours and experiences for non-riders (see case study).

CASE STUDY

Hero Dirt Rotorua (NZ)

6 days of shredding hero dirt with like-minded riders on the world's best single track in and around Rotorua. If you love enduro riding, want it loamy, and just want as much ride time as possible, then this is THE trip. There's a tonne of variety here and it's right on our doorstep - technical and tight, steep, fast and flowy, and just plain sendy if you want to push it. We'll even top it off with a helicopter shuttle into epic back country. Stay in cool lodging, have all your meals, transport, refreshments and details taken care of by an awesome team. So show up solo or bring some riding buddies - either way, you'll experience the best single track of your life.

PRICE: \$3,200pp

WEB: www.newzealandmountainbiking.com/tour/hero-dirt-rotorua/



Image Credit: New Zealand Mountain Biking. [<https://newzealandmountainbiking.com>]

CASE STUDY

Rocky Mountain Bring-Your-Partner (Canada)

You and your partner love to ride and vacation together, but a mountain bike vacation is either out of the question if you want to go together or one of you is asking for permission to travel apart. Sound familiar? You are in the right place. The Rocky Mountain Bring-Your-Partner has been redesigned for the ever-growing number of couples that ride at different levels but want to enjoy one of our epic Sacred Rides experiences without either of you being on the wrong trails. We have weaved the days together to allow advanced riders as well as the new or casual rider to hit the trails they crave. Most days you will see your partner at breakfast, lunch and rejoin in the evening for a fantastic meal and some well-deserved rest and relaxation.

PRICE: \$4,700pp

WEB: www.sacredrides.com



Image Credit: Sacred Rides. [<https://sacredrides.com>]

07. Valley of the Giants Cross-country Adventure	Elements	Description
<p>Embark on a journey of discovery as you explore the remarkable forests of the Valley of the Giants in the south west of Western Australia. The forest is dominated by unique tingle trees - literal giants - found nowhere else in the world.</p> <p>This two-day cross-country mountain bike adventure traverses the heart of the Valley of the Giants, on purpose-built tracks and shared-use trails. Starting in the picturesque town of Walpole, your journey will take you through the forest canopy with glimpses of Nornalup Inlet and the Frankland River, before arriving at the Tree Top Walk.</p> <p>Your stay includes 3 nights accommodation, entry to the Tree Top Walk, all meals and the chance to soak in your very own hot tub at the end of each day's ride. A highlight of your trip will be riding through the cavernous base of a tingle tree.</p>	Days/Nights	2D/3N
	Length	30-40km per day
	Accommodation	Glamping/Lodge
	Inclusions	Transfers; meals; trail snacks; accommodation
	Type	Self-guided
	Region/s	South West Great Southern
	Trail/s	Valley of the Giants MTB Trail Network
	Market Segment	Active Lifestyle Riders
	Market Source	Domestic International

Opportunity

The Valley of the Giants Adventure Trail Network is currently under construction, with stage 1 opened in early 2023, and stage 2 due to start in 2024.

The Munda Biddi Trail has been incorporated into the cross-country MTB network plan. The Giants Adventure Ride (81km) is the iconic trail experience, offering an immersive experience amongst the tall trees of the Walpole Wilderness. These trails will be supported by an interconnected series of loop trails of varying lengths.

There is an opportunity to develop a self-guided

package that enables riders to explore the trails over 2 days. Preliminary investigation has begun on the feasibility of establishing a trail lodge in the area to cater to packaged tours. This analysis has also identified potential sites for glamping or tiny houses.

The uniqueness of the tingle forest and the existing infrastructure associated with the Tree Top Walk will make this cross-country trail network attractive to the interstate and international active leisure market.

CASE STUDY

Timber Trail Lodge (NZ)

Our biking packages take the hassle out of planning your adventure. With Timber Trail Shuttles and Bike Hire, we'll make sure that you, your bike and your luggage get where they need to be.

No bike? We have bike hire options available too!

Our off-grid, purpose-built lodge is located in forest setting approximately halfway along an 85km trail. We offer 20 rooms (ensuite or shared bathroom); fully-catered -breakfast and dinner, and lunch packs and snacks for riding days.

Our package includes shuttle, bag transfers, car transfers, secure parking, bike hire, bike storage, charging station, repair station.

PRICE: NZ\$590pp (two nights)

WEB: www.timbertrailodge.co.nz



Image Credit: Timber Trail Lodge.
[<https://www.timbertrailodge.co.nz/timber-trail>]

08. Adaptive MTB Supported Adventure	Elements	Description
<p>An epic cycling adventure on Western Australia's purpose-built adaptive MTB trails. Spend the day zooming through forest trails on a specially adapted mountain bike. Experience the best adaptive trails in Perth and Collie.</p> <p>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.</p> <p>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.</p>	Days/Nights	3D/4N
	Length	20-30km per day
	Accommodation	3-star
	Inclusions	Transfers; meals; trail snacks; accommodation
	Type	Guided
	Region/s	Perth South West
	Trail/s	Camel Farm Arklow MTB Trails (Collie)
	Market Segment	Active Lifestyle Riders Living with a Disability
	Market Source	Domestic

Opportunity

An estimated twenty per cent of Australian adults live with a disability or long-term health condition. A 2018 study commissioned by Tourism Research Australia found that approximately three-quarters of people with a disability travel, with more stating they would like to travel if the products or technologies existed to enable/support their travel.²⁴

There is also significant market opportunity internationally. A 2017 report found that over 1 billion people worldwide have disabilities, almost half of whom are in Asia. When combined to include families and carers, this rises to 2.2 billion. Collectively, they control over \$8 trillion in annual disposable income. It has been estimated that people with disability visiting the European Union contribute over \$118 billion in both direct and indirect economic benefits.²⁵

Adaptive mountain biking enables people with a range of disabilities or impairments to participate in cycling activities. Adaptive mountain bikes vary depending on the user's mobility, but many are pedalled by hand and have three wheels.

The Arklow MTB Trails in Collie incorporate several adaptive trails that have been specifically built to enable people living with disabilities to use the trails. There is an opportunity to build on market demand for inclusive tourism experiences to develop an adventure product specifically suited to adaptive MTB.

Collie Trails Retreat has 19 nature-based campsites with disability access bathrooms and inclusive chalets under construction.

Product development will require partnership development with existing tour operators and disability organisations. For example, there may be an opportunity to work with Break the Boundary to develop a multi-day guided tour product using their expert guides.

Break the Boundary is a not-for-profit based in Perth that provides nature-based off-road cycling and hiking opportunities for people living with a disability. They run social group rides, clinics and multi-day camps and have a range of adaptive mountain bikes and trail walking technology for people to trial and hire at their Adaptive MTB and Trail Walking Hub at the Calamunnda Camel Farm.

In 2022, Break the Boundary received funding under the State Government's Hiking Participation Grant program to develop an immersive nature-based adaptive hiking program. This program aims to train guides and instructors to deliver programs for people living with a disability.

There may be an opportunity to develop a "carers/family members package" alongside the proposed product, with tours and experiences for non-riders.

09. Munda Biddi Gravel Adventure	Elements	Description
<p>Experience an unforgettable feeling of freedom and adventure gravel bike riding on the Munda Biddi Trail - 'the path through the forest'.</p> <p>You'll be riding a mix of roads, including gravel roads and single track trails. Each day offers a variety of terrains and trail surfaces to refine your gravel riding skills.</p> <p>Suitable for intermediate and experienced gravel riders, our local knowledge means we can ensure your gravel biking holiday is tailor-made to your requirements and fitness levels.</p>	Days/Nights	3D/4N
	Length	20-30km per day
	Accommodation	3-star
	Inclusions	Accommodation; transfers; some meals
	Type	Supported (or guided)
	Region/s	Perth Peel South West
	Trail/s	Munda Biddi Trail, regional road systems
	Market Segment	Active Lifestyle Riders
	Market Source	Domestic

Opportunity

Gravel grinding or gravel biking consists mostly of distance riding over unpaved roads. Fitness, sport and training are primary motivators for gravel riders, who also enjoy the opportunity for social interaction, adventure, and riding in scenic locations. Gravel riding typically involves a specialised gravel bike, with riders covering distances between 100-300km per day.

Gravel riding is growing in popularity. Much of this interest is linked to an expansion of gravel riding events. Most gravel riding tends to take place in peri-urban and rural hinterlands close to major metropolitan centres, with itineraries developed and shared (often via social media) within the gravel riding community.

There may be an opportunity to develop supported overnight itineraries for gravel riders that include bike-friendly accommodation, transfers, and ready access to evening meals, breakfast, and lunch supplies and snacks.

There may also be the opportunity to develop cycle tourism experiences linked to existing gravel riding events such as the UCI Nannup Seven. For example, a cycle tour could form part of a participant's pre-event training, or a cycle experience that uses an event route may be attractive to visitors who want to experience it in a non-competitive way.

CASE STUDY

Sardinia - Cape to Cape (Italy)

8 Days of Gravel Adventure. Climb up to the Capo Sperone lighthouse to mark the start of our journey... and looking out from Capo Mannu over the med to mark its end! Ride scenic gravel roads along the Cabras Lagoon.

Check out the UNESCO heritage Nuraghic site of Barumini. Scale the exciting gravel tracks of Monte Grighine. Enjoy the stunning scenery of the rugged coast of the Sinis Peninsula. Eat fantastic home-cooked food, washed down with honest local wine!

PRICE: \$3,400

WEB: www.skedaddle.com



Image Credit: Saddle Skedaddle Cycling Holidays. [<https://www.skedaddle.com>]

Other Cycling Experience Opportunities

The opportunities identified above are suited to mountain biking and gravel riding enthusiasts. There is also a significant market for recreational cycling at a slower pace.

10. Regenerative Cycling Holiday	Elements	Description
<p>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.</p> <p>Cycling along the Wadandi Track (rail trail), local shared-use paths, and country roads, you'll have the chance to sample delicious wines and produce, experience the serenity of giant forests, and the stunning beauty of the pristine coastlines.</p> <p>You'll be staying in unique accommodation at organic and permaculture farms, foraging for fresh produce, and learning how to make cheese.</p> <p>With your luggage transferred, logistics sorted and accommodation booked, all you need to do is pedal your e-bike and enjoy!</p>	Days/Nights	3D/2N
	Length	20-30km per day
	Accommodation	Unique
	Inclusions	Accommodation; transfers; some meals
	Type	Self-guided
	Region/s	South West
	Trail/s	Wadandi Track Regional and local cycle trails Country roads
	Market Segment	Active Lifestyle Riders
	Market Source	Domestic

Opportunity

A recurring theme in research on recreational cycle tourism is the desire for cycle tourists to be in contact with the natural environment and local culture, including produce, events, traditions and history. Studies show that an appealing cycle destination offers stunning scenery, bicycle-friendly roads or shared-use paths, cycle-friendly services and accommodation, and unique culture.²⁶

Rail Trails and shared-use paths facilitate a slow pace of riding through picturesque areas such as farmland, rural towns and villages, forests, coastlines and waterways. They are mostly flat or with very low gradients, with wide surfaces that may be gravel or paved. They are particularly popular for recreational cycling because they are suitable for riders of all abilities and suit a range of fitness levels.

Recreational cyclists have intermediate skill levels and are largely made up of novice riders who do not cycle regularly. They seek out experiences that involve less than 3 hours of leisurely riding per day. All-inclusive self-guided experiences allow them to ride at their own pace to/from their accommodation each day.

There is an opportunity to develop short cycle holiday experiences incorporating the region's rail trails and shared-use paths. The proposed Margaret River experience focuses on the region's permaculture and organic farms, with overnight stays in sustainable unique accommodation. This would support increasing interest in regenerative and sustainable tourism.

This type of self-guided short cycle break is ideally suited to e-bikes. The various elements of this experience already exist, but visitors must book each element separately and work out the logistics of their itinerary. An all-inclusive package with luggage transfer takes the hassle out of booking this holiday.

There may be an opportunity to develop similar experiences in other destinations. For example, an agritourism focused tour that links Nannup, Pemberton and Bridgetown with stays in Tiny Houses. Other locations include the Perth Hills and Denmark. However, these are more likely to appeal to an intrastate market.

CASE STUDY

Clare and Barossa Valley

The Clare and the Barossa Valleys are two of Australia's most celebrated wine regions. Discover the township of Clare, a classic South Australian town with heritage buildings built predominantly out of stone during the colonial period. Ride the full length of the Riesling Trail and enjoy visiting internationally acclaimed vineyards and farmer's markets with fresh local produce. There are plenty of opportunities to pack the panniers with a few treats to take home.

Then cycle through the stunning Barossa Valley, visiting towns such as Tanunda and Nuriootpa. Enjoy panoramic views, while also cycling along old country roads nestled between gorgeous vineyards.

With your luggage transferred and comfortable 3-star accommodation sorted, all you need to do is pedal your bike, listen to the birdsong in the air and take in the outstanding scenery of the Clare and Barossa Valleys. After this five-day trip, you'll have become fully immersed in these beautiful regions.

PRICE: \$1,990pp

WEB: www.australiacycletours.com.au



Image Credit: Australian Cycle Tours
[<https://www.australiacycletours.com.au/>]

CASE STUDY

She Bikes He Bikes - Otago Rail Trail (NZ)

If you're up for the epic 150 Km end to end experience, then let us put together a package for you, we can start you cycling at either end of the trail and even in the middle. You'll find our itineraries are comprehensive, fully itemised with no hidden costs. Our hire fleet is made up of quality Specialized USA comfort bikes and mountain bikes (29rs) and we can arrange baggage transfers and personal transfers to and from the Otago Central Rail Trail.

Itineraries:

- Five days - Soak it up
- Four days - Deluxe - Smooth Start
- Four days - Deluxe - In the Grove
- Four days - In the Grove
- Three days - Getting it done
- Two days - Spring
- One day - Day Trips

PRICE: Four days from NZ\$1,200pp

WEB: www.shebikeshebikes.co.nz/otago-central-rail-trail/



Image Credit: Timber Trail Lodge.
[<https://www.shebikeshebikes.co.nz/>]

PADDLING

Paddling is an umbrella term used to describe the use of a paddlecraft (also referred to as a vessel) on the water. Paddlecraft include sit-in and sit-on-top kayaks, canoes, stand-up paddleboards, rafts, or similar craft that are propelled by a person using a paddle who is on or in the craft.

Recreational paddling may occur on:

- **Flatwater** – water that is not moving, most likely a river, lake or inlet
- **Moving water** – waters that are moving, e.g. rivers in flow or an estuary with tidal currents
- **Whitewater** – moving water with a significant number of rapids
- **Sea/open water** – waters not enclosed by land

These terms provide a useful guide when determining the nature of a paddling experience; however, water conditions can vary according to many factors and grading systems identify the level of difficulty and risk, and safety requirements.

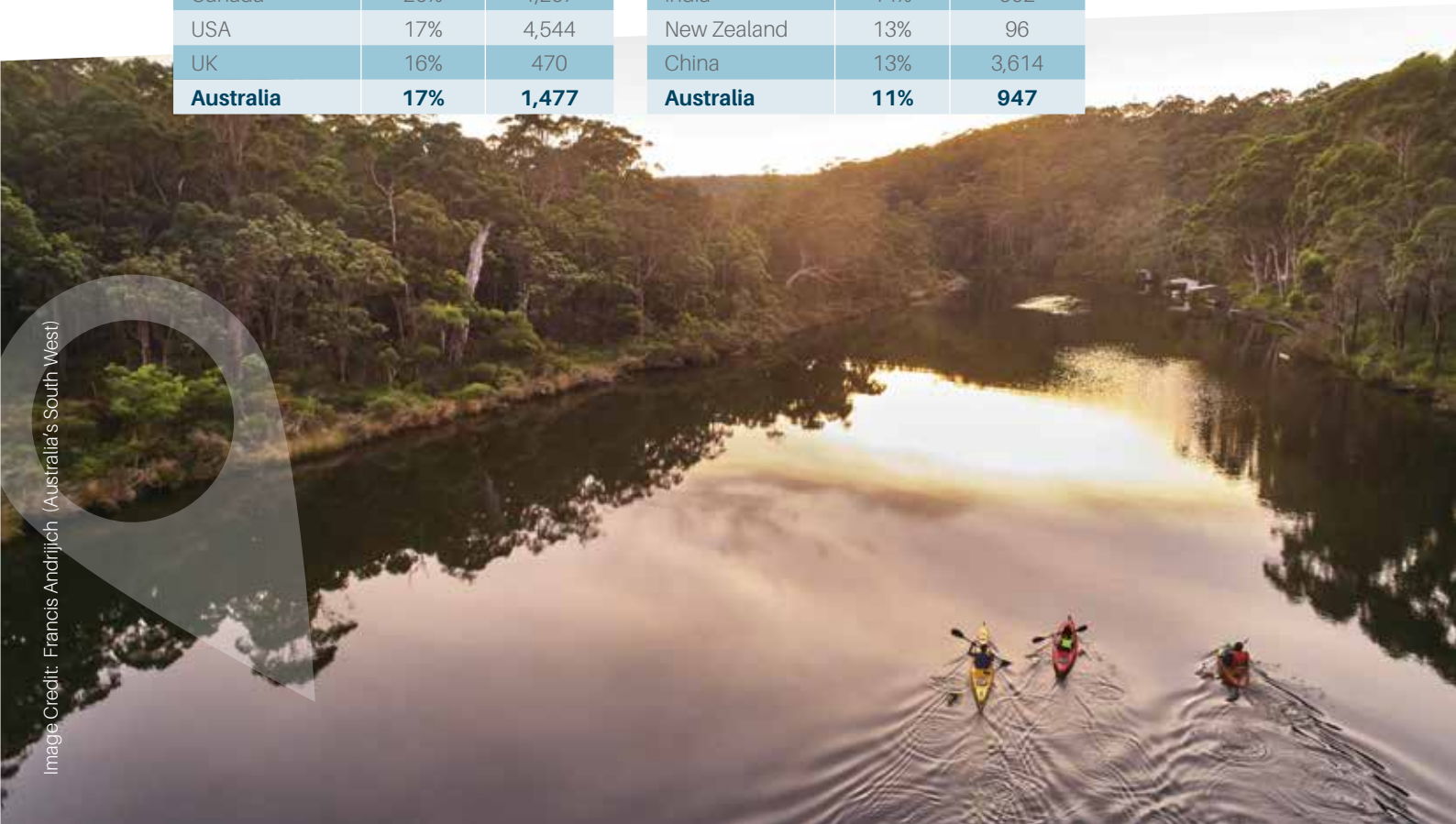
Market Potential

The *Future of Global Tourism Demand* report reveals that on average a quarter of Out of Region Travellers are interested in water sports, with the strongest interest among Working Holiday Makers (38%).³

- **Paddle Sports** – on average, 1 in 10 are interested in paddle sports, with strongest interest from Working Holiday Makers (20%) and High Yield Travellers (17%). The Top 3 markets interested in paddle sports are New Zealand, Canada and USA. This audience skews towards females and higher income levels.³
- **Rafting** – overall, 12 per cent of Out of Region Travellers are specifically interested in rafting experiences, with significantly higher interest among Higher Yield Travellers (14%), Luxury Travellers (14%) and Working Holiday Makers (19%). Rafting is of higher interest to several Eastern markets. Those interested in rafting skew towards young families and tend to have higher incomes.

Table 14. Interest in Paddle Sports and Rafting across the Globe³

Paddle Sports	Interest (%)	Size ('000)	Rafting	Interest (%)	Size ('000)
Global	14%	16,866	Global	12%	14,455
New Zealand	22%	164	Indonesia	18%	550
Canada	20%	1,267	India	14%	502
USA	17%	4,544	New Zealand	13%	96
UK	16%	470	China	13%	3,614
Australia	17%	1,477	Australia	11%	947



Domestic Participation Trends

There is very little data on paddling visitation trends. Domestic participation data provides proxy for market demand within Australia.

In 2022, 346,227 Australians participated in canoeing or kayaking (1.6% of the adult population). Notably, participation in canoeing/kayaking has grown significantly since 2019 (n=276,000 participants).²⁷

There is a skew towards male participation (56%), and interest is higher amongst those aged 45-64. Kayaking attracts the highest level of participation (82%) compared to canoeing (14%).²⁷

The top reasons for participation are "fun/enjoyment" (49%), "physical health or fitness" (34%), and "to be outdoors/enjoy nature" (34%). Most participation is non-organised (i.e. it is not organised by clubs or other groups).²⁷

Tasmania has the highest participation rate (2.8%), while New South Wales has the highest share of participants nation-wide (37.8%). Of those surveyed, fifty-four per cent took part in canoeing/kayaking between 1-11 times per year.²⁷

One study of recreational paddlers conducted for the Shire of Gympie in Queensland, found that 35 per cent of respondents spent 2-3 hours paddling, and 27 per cent spent around half a day on the water. The highest demand was for Grade 1 (Flatwater or Moving Water), short (0 - 5km) to medium trails (5 - 10 km).²⁸

A survey of trail users in the Great Southern identified a similar pattern of usage. Among respondents who highlighted canoeing or kayaking as their predominate trail activity, 42.5 per cent spent 2-4 hours on the water, 20 per cent spent less than 2 hours, and 23 per cent spent a full day on the water.²⁹

Most respondents described their paddling ability as "intermediate" (67%), with 18 per cent beginners, and 15 per cent advanced. The majority went paddling with a friend or partner (82%), and a significant number also paddled independently (57%). Almost half paddled at least once a week. The top three reasons for paddling were: being in nature, exercise/fitness, and fun/excitement.

Paddling Visitor Segments

There is limited market research on Australian paddling visitor segments. Table 15 provides a summary of international research on paddler markets. It draws on two studies - one of paddlers in the United States and the other of German participants in a whitewater holiday experience.

These studies, while limited in scope, align with the market research on mountain biking visitor segments. In sum:

- **Active Lifestyle Paddlers** – keen recreational paddlers who seek out opportunities to paddle for a day to overnight with friends and family members. The US study found this group to account for 19.2 per cent of respondents (n=413). There are opportunities to develop products for this market in WA.
- **Independent Paddlers** – adrenaline seekers looking for challenge. More likely to travel solo or with friends, and seek out difficult, technical or challenging routes over multiple days. The US study found this group to account for 20.2 per cent of respondents (n=435). There is limited opportunity to develop products for this market, although supported expeditions may be of interest for first time visitors.
- **Leisure Paddlers** – a diverse group of holiday makers who seek out short paddle experience using canoes or kayaks. They have varying skill levels, and paddle with friends and family for fun and enjoyment. The US study found this group to account for 60.6 per cent of respondents (n=1,304). Products developed for this market are unlikely to be destination drivers but will extend length of stay for travellers already visiting the region.

Table 15. International Paddler Markets

Destination Trail Users				
WA Trail Markets	US Study (2014) ³¹		German Study (2018) ³²	
Active Lifestyle	Recreational Travelers	Recreational paddlers who frequently paddle both non-locally and locally. More like to be male, aged 41-60. More likely to use a kayak with friends. Day trips or overnight. More likely to develop own itineraries or follow self-guided routes.	Active Vacationers	Highly social tourists who participate in a range of activities with their family members and friends. Strong interest in joining other nature or adventure-based activities
Independent	Enthusiast Travelers	Avid paddlers who frequently paddle both non-locally and locally. Tend to be male, aged 18-40. More likely to use a kayak and paddle solo, with friends or a club. More likely to take trips of 3-4 days and plan their own trips.	Challenge Seeker Vacationers	Enthusiastic paddlers who are motivated to challenge their abilities and to improve their physical, social, and intellectual skills.

Trail Users While on Holiday				
WA Trail Markets	US Study (2014) ³¹		German Study (2018) ³²	
Leisure Trail Users	Recreational Hobbyist	Recreational paddlers who frequently paddle in their local area only. More like to be female aged 41-60. More likely to use a kayak with friends. Day trips self-guided and guided.	Moderate Vacationers	Strongly motivated by a desire to have fun and seek out enjoyable, novel experiences when travelling.
	Occasional Paddler	Infrequent paddlers. More like to be female, aged 31-50. More like to use a canoe. Less than a day, self-guided and guided.		
	Novice Paddler	Recreational paddlers who frequently paddle in their local area only. More like to be female aged 41-60. More likely to use a kayak with friends. Day trips self-guided and guided.		
			Reluctant Vacationers	Low level of motivation or previous experience. These participants seem to be encouraged either by the tour sales person or their companions. In general, they are less satisfied with the experience than other groups.

paddling Experience Opportunities

As outlined in the *Trail Product Audit Report*, there are no overnight paddling experiences in the region, no whitewater experiences, and limited sea/open water experiences. The following proposed tours have the potential to address key product gaps.

11. Family Canoeing Camp	Elements	Description
<p>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.</p> <p>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.</p> <p>The Donnelly River offers a scenic paddle through pristine bush with impressive limestone cliffs close to the coast. There's lots of opportunity for fun along the way – swimming, exploring and camping over two nights.</p>	Days/Nights	3D/2N
	Length	2-3 hours per day
	Accommodation	Camping
	Inclusions	Transfers; meals; snacks; camping equipment
	Type	Guided
	Region/s	South West
	Trail/s	Donnelly River
	Market Segment	Active Lifestyle Riders
	Market Source	Domestic

Opportunity

Research shows that family travel plays a key role in busy family lives by offering a chance for families to reconnect, recharge and have a break from their normal routine.

The key drivers for domestic travel by families are ease and convenience, and they seek out destinations, facilities and experiences that are family-friendly. Value-for-money (affordability) is also important, so inclusive packaged tours are appealing.³³

There is an opportunity to develop a paddling package suited to families. This experience is unlikely to be a destination driver for interstate and international family travellers but could play a role in extending length of stay or regional dispersal. It will also appeal to intrastate visitors.

The proposed experience is set on the Donnelly River with overnight camping. The Murray River, Blackwood River, Wellington Dam area, and Frankland River provide similar opportunities.

CASE STUDY

Lower Klamath River Rafting (USA)

Explore a special stretch of the Lower Klamath near Happy Camp, CA where the water bubbles with bouncy, easy rapids and warm, pleasant swimming holes. Often adored by OARS' littlest guests, it's an ideal choice for those with young children interested in a family adventure vacation or introduction to whitewater rafting. Days are filled with splashy rapids, calm pools for swimming, and perhaps even an opportunity to jump off a rock into the river before reaching camp and enjoying one more night under the stars together.

PRICE: US\$1000pp (3 days)

WEB: www.oars.com



Image Credit: OARS.
[<https://www.oars.com/adventures/lower-klamath-river-rafting/>]

12. Whitewater Rafting Expedition	Elements	Description
<p>Negotiate the untamed waters of the Frankland River Western Australia on a whitewater rafting adventure.</p> <p>Paddle your way through the heart of the Walpole Wilderness. Experience the majesty of the giant Tingle Trees, surging rapids, and tranquil river flows.</p> <p>This expedition trip highlights the best rapids in the lower reaches of the Frankland River, including incredible boulder sections.</p> <p>Each night you'll camp under the stars, enjoying delicious food and swapping stories about the day's adventure.</p>	Days/Nights	3D/2N
	Length	3-4 hours per day
	Accommodation	Camping
	Inclusions	Transfers; meals; snacks; camping equipment
	Type	Guided
	Region/s	South West Great Southern
	Trail/s	Frankland River
	Market Segment	Active Lifestyle Independent Adventurer
	Market Source	Domestic International

Opportunity

Research has identified the following core dimensions of adventure tourism – risk and danger, the natural environment, thrill and excitement, challenge, and physical activity.³⁴

Whitewater rafting meets these cognitive and emotional dimensions of adventure tourism by providing a context in which participants can experience thrill and challenge in a supported environment.

There is an opportunity to develop a whitewater paddling expedition on the Frankland River. The river provides the only consistent remote whitewater in WA. However, it is still dependent on seasonal flows and will require professional expert instructors to guide and navigate the river system.

Feasibility for this product is currently being examined.

CASE STUDY

Rafting the Franklin River (Tasmania)

Professionally guided 5 to 10 day wilderness whitewater rafting expeditions through the rapids and reaches of the iconic Franklin River in South West Tasmania. Franklin River rafting trips are true expedition holidays. There are many rapids, some may require strenuous portages. No previous whitewater rafting experience is necessary, but please be aware that rafting and camping in this untamed and remote wilderness does require at minimum a medium fitness level and a sense of adventure.

This trip starts on the Collingwood River which soon joins up with the Franklin River and finishes on the Gordon River. It usually takes 7 or 8 days to raft the full navigable length of the Franklin River (110 km).

PRICE: \$3,650pp (7 days)

WEB: www.franklinriver.com



Image Credit: Water by Nature Tasmania Franklin River Rafting.
[<https://franklinriver.com>]

13. Historic Coast Sea Kayaking Adventure	Elements	Description
<p>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.</p> <p>Your journey starts at Frenchman' Bay, paddling past Quaranup Historic Quarantine Station, to Middleton Beach and Emu Point. You'll explore Oyster Harbour and Green Island, before following the coastline of Gull Rock National Park to Nanarup Beach.</p> <p>There's plenty of time on this tour to learn about the region's history, culture and biodiversity. Package includes entry to Albany's Historic Whaling Station, the National Anzac Centre, and a guided tour with a local Aboriginal guide.</p>	Days/Nights	3D/2N
	Length	2-3 hours per day
	Accommodation	3-star
	Inclusions	Transfers; meals; snacks; accommodation
	Type	Guided
	Region/s	Great Southern
	Trail/s	Albany Coastline
	Market Segment	Active Lifestyle (Intermediate)
	Market Source	Domestic

Opportunity

Western Australia's coastal lifestyle is a key drawcard for interstate and international visitors. Sea kayaking provides an active way to explore the region's beaches and coastlines. Experiences can be tailored to the needs of novices, recreational paddlers with intermediate skills, as well as highly experienced paddlers.

However, much of the region's coastlines are exposed to ocean swell and wind, and lack sheltered waters, bays and harbours suited to paddlers with intermediate skill levels.

Albany's harbours are an exception. The proposed itinerary builds on Albany's unique maritime heritage to showcase spectacular King George Sound.

By limiting paddle time to half-days, there is also an opportunity to package a range of half-day land-based tours focused on history, heritage, culture and biodiversity.

This proposed tour also leverages key events such as Albany's maritime festival and Bicentenary commemorations.

CASE STUDY

Three Capes Kayak (Tasmania)

Spend four days kayaking around the Tasman Peninsula. Start your trip at Lime Bay Coastal reserve where we take a short paddle to the infamous convict coal mines historic site.

Day 2 we paddle towards Cape Huay, one of the highlights of the Three Capes Track.

Day 3 we paddle south past the Tasman Arch and Blowhole. Lunch is enjoyed at Bivouac Bay where we can stretch our legs on a hike with great views over the sea cliffs.

Day 4 we experience the Port Arthur site by kayak before paddling south to the spectacular Crescent Bay for lunch. After a rest and a swim for the bold, we will round out the afternoon with a 2.5 km return hike to the summit of Mt Brown.

PRICE: \$3,060pp

WEB: www.tasmanianexpeditions.com.au/Raft-Canoe-Kayak/Three-Capes-Kayak



Image Credit: Tasmania Expeditions.
[<https://www.tasmanianexpeditions.com.au>]

14. Kapagup-Nornalup Kayaking Holiday	Elements	Description
<p>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.</p> <p>Paddle to the southern edge of Nornalup Inlet and hike out to the rugged southern ocean.</p> <p>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.</p>	Days/Nights	5D/4N
	Length	3-4 hours per day
	Accommodation	3-star
	Inclusions	Kayaks, transfers, meals, and accommodation
	Type	Self-guided
	Region/s	South West Great Southern
	Trail/s	Kapagup-Nornalup Paddle Trails
	Market Segment	Active Lifestyle
	Market Source	Domestic

Opportunity

The Kapagup-Nornalup Paddle Trail Network consists of 14 paddle trails of various lengths within the Walpole and Nornalup Inlets, and along the Walpole, Deep and Frankland Rivers.

There is an opportunity to develop a self-guided inclusive package that enables visitors to explore different parts of the paddle trail network over multiple days. Itineraries can be developed to suit paddlers with different skills and experience, from novice to advanced paddlers.

There may also be an opportunity to develop a self-guided camping holiday as part of the experience offering. This would include camping gear and suggested locations for pitching a tent for an overnight paddle.

An all-abilities canoe launch is being installed on the Frankland River in Nornalup. This provides an opportunity to develop a range of para-canoe experiences. Inclusive accommodation suited to people living with a range of disabilities will be essential for this product.

CASE STUDY

Abel Tasman National Park Kayak Tour (New Zealand)

Spend three days kayaking the coastline from beautiful Totaranui/Awaroa in the North down to the golden shores of Marahau. Spacious and spectacular, the northern section is seldom visited by others. The middle of the park offers lagoons and rocky outcrops. The southern section showcases twelve stunning beaches to end your journey.

Immerse yourself completely in the natural wonders of the Abel Tasman National Park. Be wowed by the night sky, the milky way is truly amazing in the park. Enjoy drifting to sleep listening to the waves before waking up to bird song. It's a relaxing, content-rich, fully catered, beach side camping experience.

PRICE: NZ\$999

WEB: www.abeltasmankayaks.co.nz/guided-kayak-tours/three-day-classic/



Image Credit: Abel Tasman Kayaks.
[<https://www.abeltasmankayaks.co.nz>]

15. Bay of Isles Sea Kayaking Expedition	Elements	Description
<p>The Archipelago of the Recherche (or Bay of Isles) consists of 105 islands of the coast of Esperance on the remote south coast of Western Australia.</p> <p>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.</p> <p>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.</p>	Days/Nights	4D/3N
	Length	4-6 hours per day
	Accommodation	Glamping & Camping
	Inclusions	Transfers; meals; snacks; accommodation
	Type	Guided
	Region/s	Great Southern
	Trail/s	Esperance Coast
	Market Segment	Active Lifestyle (Experienced) Independent Adventurer
	Market Source	Domestic International

Opportunity

Expedition-style sea kayaking in open waters is popular with experienced paddlers. Destinations include the south-west of Tasmania and Bass Strait, which are subject to the same weather patterns as much of the southern coastline of Western Australia.

There may be an opportunity to develop a sea kayaking experience in the Bay of Isles off Esperance. However, this would require a feasibility assessment with experienced paddle guides, and discussion with DBCA regarding access to remote islands for camping.

CASE STUDY

South West Tasmania

8-Day Sea Kayaking Expedition in Tasmania's Wilderness World Heritage Area, offers a combination of sheltered wilderness harbours, rugged ocean coastlines, remote islands and wild rivers. There are no roads and no settlements.

Discover spectacular destinations in the best way possible - by water, at paddling pace.

This trip has a flexible itinerary with time for optional short walks or relaxing on the beach. Your nights will be spent in remote and hidden campsites with a treat on the last night at the luxurious Forest Lagoon standing camp. Every night you'll enjoy delicious food with a glass of wine.

PRICE: \$4,150pp

WEB: www.roaring40skayaking.com.au/8-day-sea-kayak-expedition



Image Credit: Roaring 40s Kayaking.
[<https://www.roaring40skayaking.com.au>]

HORSE RIDING

Horse riding includes a range of different disciplines that involve interaction with a horse, such as riding, driving and vaulting.

Horse or equestrian tourism is defined as:

*any form of tourism where the horse is an element of the tourism experience.*³⁸

This definition encompasses a range of activities, including participation in competitive events, attendance at horse racing events, as well as undertaking horse tours. This report is focused on the latter.

Horse tour products fall into four major categories:⁴¹

- Guided commercial horse treks and trail rides (core experience offering)
- Farm stays, guest and working ranches (core experience offering)
- Expert riding clinics and riding camps (peripheral product)
- Horse-drawn carriages where clients need no riding skills and have no direct interaction with horses (minor product)

This report focuses on the first two categories which represent the core experience offerings in horse tourism.

Within the literature on horse tourism, a distinction is often made between horse rental – which refers to horseback riding sessions less than a day – and horse trekking (i.e. trip of more than 24 hours). This distinction is explored further in the discussion of visitor markets (see below).

Horse riding occurs in a range of landscapes using a variety of trails or tracks, including:

- Firebreaks
- Road verges
- Bridle Trails
- Stock Routes
- Rail Trails
- Gazetted gravel roads
- Shared-use / Multi-use Trails
- Beaches

Women far outnumber men in equestrian tourism activities, with some international retailers stating that 70-80 per cent of their clients are female.³⁹



Market Potential

The *Future of Global Tourism Demand* report reveals that one in five Out of Regional Travellers are interested in horse riding, with greatest interest among Luxury Travellers (24%) and Working Holiday Makers (32%).³

Those interested in horse riding skew younger (18-29) and are female with below-average incomes.³

The strongest travel motivations are “into nature”, “exploration” and “adventure”. There is strong affinity between horse riding and adventure sports.

Table 16. Interest in Horse Riding across the Globe³

Market	Interest (%)	Rank out of 89 Experiences	Size ('000)
Global	20%	68	25,056
India	32%	44	1,192
USA	25%	46	6,539
China	21%	52	5,912
Canada	22%	53	1,364
Malaysia	26%	56	433
Singapore	22%	60	334
Australia	18%	66	1,614

Domestic Participation Trends

In 2022, 229,000 Australians participated in horse riding. There is a skew towards female participation (85%).³⁵

The top reasons for participation are “fun/enjoyment” (63%). Most participation occurs in regional and remote areas and is non-organized (54.2%) (i.e. it is not club based).³⁵

A 2018 study conducted as part of the *Shire of Serpentine Jarrahdale Equine Strategy* found that horse trail riding is the most popular of all equine activities (62%), followed by recreational riding (54%) and dressage (35%).³⁶

The preferred riding distance was 6-10km (36%), followed by 10-20km (21%) and 5km (18%). Eighteen per cent of riders preferred to ride distances greater than 20km.³⁶

Recreational Horse Riding Activities

The Australian Trail Horse Riders Association (ATHRA) identifies four main recreational horse riding activities:³⁷

- **Horse trail riding** – riding on natural trails for several hours up to a day. Includes participants from different equine pursuits and involves varying distances, experience and abilities. Participants ride outside of enclosed areas for pleasure, challenge, experience and educational outcomes. Users are looking to exercise their horses and ride in attractive rural settings for a few hours to a day-long ride.
- **Horse trekking** – long distance point to point riding involving the use of either pack horses or support vehicles to carry overnight camping equipment and supplies, or cloverleaf style which involves self-catering and overnight camping. These are non-competitive riders who often travel long distances along linear trails or on daily loops of up to 30 kilometres from a base. Trail experience range from overnight to rides that last several weeks.
- **Endurance riding** – riding in long distance loops (20km, 40km, 80km), usually as a competitive event.
- **Harness driving** – hitching a vehicle to a horse and riding on trails.

Horse trail riding and horse trekking are the two primary forms of recreational horse riding undertaken as part of horse tourism.

Horse Riding Visitor Segments

There has been very little market research on horse tourism visitor segments. One study of Australian horse tourism describes two key segments:³⁸

- **Tourists hiring horses** – inexperienced riders with a range of motivations and behaviours, including “always wanted to ride”, event-focused riding (e.g. hen’s parties), and former horse riders returning to riding.
- **Tourists who own horses** – regular riders who own their own horses or access to horses that they use for recreational riding. Some of these riders travel regularly to ride for training, events, pleasure and holiday activities, including internationally.

This categorisation also overlaps with distinction between **Horse Rentals** (activities of less than one day) and **Horse Trekking** (rides of more than one day), with tourists who own horses more likely to participate in horse trekking tours.

However, this distinction does not account for beginner and novice riders who seek out horse trail riding experiences of more than one day in duration.

An analysis of international horse tourism experiences reveals that most multi-day tour products are suited to riders with a range of skill levels, including beginners with limited riding experience. This suggests that interest in horse trekking experiences is not limited to tourists who own their own horses or regularly access horses for recreational riding.

Horse tourism experience development, therefore, needs to accommodate a range of skill levels.

Travel Motivators

Research has identified the cultural importance of “horsemanship” as a key motivator for many horse tourists. Except for short duration horse rides, most horse tourists do not see the horse as a means of transport. Instead, spending time *with* horses is a key reason for travel.³⁹

Research on horse tourism has identified several other key experience motivators for horse tour participants.⁴⁰ This research suggests that these motivations are shared by riders of all abilities and experience levels.

Experience of nature – a way to get to know the landscape through bodily immersion (as opposed to “just gazing” at the scenery). A slow form of travel that offers a different way of experiencing the landscape.

Beauty – horse tourists expect to observe beauty in nature; and to see and experience a natural world that is different to what they observe at home.

Escape and relaxation – a way of getting away from a stressful, urban environment.

Nostalgia – to experience a romantic past (before modern transport) or a different type of lifestyle.

Horse Riding Experience Opportunities

As outlined in the *Trail Product Audit Report*, there are limited overnight horse riding experiences in the study area. The following proposed tours have the potential to address key product gaps.

16. Warren Blackwood Stock Route Adventure	Elements	Description
<p>Join us for an equestrian adventure that brings to life the heritage of Australia's cattle droving stock routes.</p> <p>Experience the beauty of giant forests, tranquil rivers, peaceful inlets, and picturesque rural towns. The Warren Blackwood Stock Route is a 320km bridle trail based on the old stock droving routes of pioneering families of Western Australia's South West.</p> <p>Your adventure starts in Nannup and continues from Bridgetown through the Shannon National Park and Broke Inlet.</p> <p>You'll camp overnight with your horse, sharing stories around the campfire and imagining the life of the long-distance cattle drover of yesteryear.</p>	Days/Nights	6D/5N
	Length	4-5 hours per day
	Accommodation	Camping
	Inclusions	Transfers; meals; snacks; camping equipment; horses
	Type	Guided
	Region/s	South West
	Trail/s	Warren Blackwood Stock Route
	Market Source	Domestic International

Opportunity

Australia's history of horsemanship and cattle droving provides a unique point of difference to horse trekking tours offered in other destinations.

There is an opportunity to build on this history by showcasing the towns and national parks along the Warren Blackwood Stock Route on a multi-day supported horse trek.

The length of the trip will be determined by the starting point. Finishing at Broke Inlet provides an

important opportunity to showcase the coastal landscape and include beach riding.

There may also be an opportunity to develop an advanced expedition style route along the historical Forest Hill and/or Camballup-Moriarty stock routes through the Shires of Plantagenet and Denmark, pending route development and DBCA approval.

CASE STUDY

Man from Snowy River Heritage Ride (NSW)

The 'Man from Snowy River' horseback experience incorporates bridle tracks through quiet valleys and points of rich historical interest.

Our journey up the majestic Howqua River along the high track towards "Stockyard Creek", visiting historic huts made famous by the Man from Snowy River movie.

This tour includes challenging riding with spectacular views over the river, tree fern gullies and cantering sections.

Each night you'll stay in rustic overnight accommodation, including an authentic pioneer homestead experience and local gourmet cuisine.

PRICE: AU\$3,000pp (5 days)

WEB: www.watsonstrailrides.com.au



Image Credit: Watson's Mountain Country Trail Rides.
[www.watsonstrailrides.com.au]

17. Southern Forests Trails	Elements	Description
<p>Experience the joy of horse riding on our short break trail camp. This horse riding trail tour offers a mix of tuition and enjoyable rides through peaceful forests.</p> <p>Suitable for adults and children of different ages and abilities, this trip will introduce you the pleasures of trail riding on a network of dedicated bridle trails.</p> <p>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.</p>	Days/Nights	3D/2N
	Length	2-3 hours per day
	Accommodation	Camping
	Inclusions	Transfers; meals; snacks; camping equipment; horses
	Type	Guided
	Region/s	South West
	Trail/s	Shannon NP Bridle Trails
	Market Segment	Beginner-Intermediate
	Market Source	Domestic International

Opportunity

There is an opportunity to provide a family-friendly horse riding camp experience that incorporates tuition and short trail rides with camping.

The Shannon National Park Bridle Trail network incorporates three main trails that vary in length from 7km to 20km. A dedicated campground for horse riders includes toilets, hot showers, picnic area, and yards for horses.

There is an opportunity to develop a similar product utilising the bridle trails in the Shire of Serpentine-Jarrahdale. The recently completed Equine Strategy for the shire identifies a range of proposed new or upgraded bridle trail development.

CASE STUDY

Banff Lodge Ride (Canada)

Rugged mountain scenery and an abundance of wildlife.

That's what you'll find on the 3-day Sundance Explorer ride. And when the sun sets, you'll be relaxing in pure backcountry comfort. Cowboy style.

This adventure takes you along the glacier-fed waters of the Bow River, one of the best spots in Banff to spot elk, deer or even moose roaming along the shores. Follow the historic Storm pack trail, travelled by renowned explorer Erling Storm in the early 1900s, while taking in awe-evoking views of the Sundance mountain range.

At night, the cozy Sundance Lodge gives you a surprisingly comfortable spot to rest your head. Snuggle by the fire, devour gourmet backcountry cuisine and swap tales about the day's adventures with your fellow riders.

PRICE: CAN\$1,400pp (3 days)

WEB: www.hiddentrails.com/pub/tour.aspx?id=ab_banff_lodge_rides_3&tourtype=FamilyVacations



Image Credit: Hidden Trails.
[www.hiddentrails.com]

18. Women's Horse Riding Wellness Retreat	Elements	Description
<p>Combine your love of horses with yoga, meditation, and massage for the ultimate wellness retreat.</p> <p>Whether you are more familiar with horse riding or with yoga, you will be challenged by and find joy in this retreat.</p> <p>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.</p> <p>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.</p> <p>And of course, your trip wouldn't be complete without a pairing with the region's award-winning wines.</p>	Days/Nights	3D/2N
	Length	2-3 hours per day
	Accommodation	Luxury
	Inclusions	Transfers; meals; snacks; accommodation; wellness activities; horses
	Type	Guided
	Region/s	South West
	Trail/s	Margaret River (various)
	Market Segment	Intermediate-Advanced
	Market Source	Domestic International

Opportunity

Research shows that the strongest interest in horse riding experiences comes from women.

The *Future of Global Tourism Demand* report notes that overall more than a third of Out of Region Travellers are interested in spa treatments, with strongest interest from Japan (43%), the UK (41%), Italy (46%) and Hong Kong (43%). This interest is heavily skewed to women and higher income levels.³

The report also shows a strong affinity between spa treatments with wellness retreats (40%), winery stays (33%), and horse riding (28%).

There is an opportunity to develop a women-only experience that combines all these interest areas.

There may also be an opportunity to develop this experience in the Esperance area.

CASE STUDY

Connection, Liberty and Yoga (Costa Rica)

Come and participate in our exceptional retreat that has been thoughtfully planned to help you connect with horses, nature and your inner power.

Our retreat merges the daily rituals of yoga, guided meditation and Natural Horsemanship teachings to enhance your body language, concentration and leadership skills. Live in the moment and relish the fresh air and tranquillity of our charming mountain farm. Learn mindfulness and connect with yourself while meditating and interacting with your equine companion. Experience the harmony between you and your horse during your yoga sessions. Immerse yourself in the vitality and serenity of our jungle environment.

PRICE: US\$2,100pp (7 days)

WEB: www.horseridingtours.com/costa-rica/cartago/connection-liberty-and-yoga-237424



Image Credit: Horse Riding Tours. [www.horseridingtours.com]

MULTI-ACTIVITY

Multi-activity tours provide opportunities for travellers to experience a range of different trail activities in one package.

For the purposes of this report, multi-activity tours are defined as:

The combination of one or more trail activities into one tourism product. For example, a trip that includes hiking and mountain biking, or hiking and paddling.

This definition does not include products where **one** trail activity is combined with another non-trail tourism experience such as wellness activities or indigenous cultural tours. These types of products are discussed in the previous section under the relevant trail activity type.

This definition does not include holidays where travellers purchase multiple separate tourism products to create a multi-experience itinerary.

The advantages of multi-experience products are manifold:

- **Opportunity to try something new** – visitors can try a new trail activity in a supported environment.
- **Experience the landscape from different vantage points** – visitors can immerse themselves in the landscape and gain a greater insight into its unique qualities.
- **Suited to groups with mixed skills and experience levels** – few visitors will have advanced skills in all activities, thus allowing mixed groups to learn and share.
- **Perceived 'value for money'** – bundling may be perceived as a cost-effective and time efficient way to experience multiple activities on one trip.



Market Potential

The *Future of Global Tourism Demand* identifies strong affinity between trail activities and other adventure activities – see Table 17. [N.B. only trail or adventure activities have been included in the table – other experience offerings with affinity to the trail activity are not included]

Table 17. Trail Activities by Affinity with other Trail Experiences (Top 10)³

Activity	Other experiences with strong affinity				
Hiking/Walking	Walking tours (#1)	Trekking / camping (#3)	Cycling (#4)	Mountain / rocks sports (#5)	Trail running (#10)
Walking tours	Hiking/walking (#1)	Indigenous guided tours (#4)	Trekking / camping (#6)		
Trekking/ camping	Hiking/walking (#1)	Mountain / rock sports (#2)	Other adventure / extreme sports (#4)	Trail running (#10)	
Trail running	Surfing (#1)				
Cycling	Trekking / camping (#1)	Mountain / rock sports (#2)	Surfing (#3)	Trail running (#9)	
Other water sports (includes paddle sports)	Snorkelling (#2)	Other adventure / extreme sports (#3)	Mountain / rock sports (#5)	Horse riding (#7)	Surfing (#8)
Horse riding	Other adventure / extreme sports (#1)	Surfing (#2)	Trail running (#10)		

Table 22 reveals a strong affinity between different walking and running activities. That is, travellers who enjoy hiking also likely to enjoy trekking and trail running.

Trekking/camping and trail running are also enjoyed by travellers who are interested in cycling.

Trail running is listed as an interest area for many trail-based experiences, but curiously, amongst those interested in trail running, other trail activities or adventure activities are unlikely to be mentioned.

Interestingly, surfing has a strong affinity for many non-hiking trail experiences.

Mountain/rock sports and other extreme adventure sports also have a strong affinity with trail-based experiences.

This analysis is suggestive of potential multi-experience product clusters but needs to be supported by more detailed market analysis of specific visitor segments.

For example, research used to develop the WA Trail Visitor Segments for Hiking and Mountain Biking shows that:

- Active Leisure Hikers and Active Leisure Cyclists participate in a range of trail and adventure activities;
- Independent Hikers and Cyclists have lower levels of interest in other trail activities; and
- Adrenaline Seekers are interested in adventure and extreme sports, but not hiking/walking.

19. Paddle, Peddle and Promenade	Elements	Description
<p>Explore the beautiful forests, rivers and lakes of Wellington National Park.</p> <p>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.</p> <p>After a relaxing night at our campsite near Honeymoon Pool, we embark on a hike on a section of the Wiilman Bilya Trail that skirts through the marri and jarrah forest along Wellington Reservoir.</p> <p>Your adventure concludes with a fantastic cycle trail along the shared-use Sika Trail, concluding at the amazing Wellington Dam mural.</p>	Days/Nights	3D/2N
	Length	3-4 hours per day
	Accommodation	Camping
	Inclusions	Transfers; meals; snacks; accommodation, all activities
	Type	Guided
	Region/s	South West
	Trail/s	Wellington National Park
	Market Segment	Active Lifestyle
	Market Source	Domestic International

Opportunity

Wellington National Park provides a range of hiking, cycling and paddle experiences near several nature-based campgrounds.

The proposed itinerary incorporated three trail activities with overnight camping. The experience is most likely to appeal to the intrastate family visitor, but with appropriate marketing that leverages the Wellington Dam mural may appeal to some interstate and international travellers.

There is an opportunity to develop similar experiences in other locations:

- Rottneest Island, with the inclusion of snorkelling, and glamping stay
- Margaret River region, with the inclusion of coasteering, surfing and/or wild swimming
- Valley of the Giants, incorporating farmstay or chalet style accommodation

CASE STUDY

Cycle, Kayak and Walk Tasmania

Selected as one of National Geographic Traveler magazine's '50 Tours of a Lifetime' this complete active adventure traverses all the must-see highlights of Tasmania's spectacular East Coast. With a combination of vehicle supported cycling, kayaking and walking you will make the absolute most of this adventure playground.

Over six days you will cycle through picturesque rural landscapes, past vineyards and lush orchards, along stunning coastline, and down deep forested valleys. You will kayak the sparkling aquamarine waters of Freycinet National Park and walk to one of the world's most beautiful beaches - Wineglass Bay. You'll catch a ferry to Maria Island and spend two days discovering the rich history, world class scenery and extremely friendly wildlife. A drive to the summit of Kunanyi (Mt Wellington) is the fitting conclusion to this fun filled trip. This tour caters to a wide range of fitness levels, with the constant support of guides and vehicle, so you can complete as many or as few kilometres as you please.

PRICE: AU\$3,595pp (6 days)

WEB: www.tasmanianexpeditions.com.au/cycling/cycle-kayak-and-walk-tasmania



Image Credit: Tasmanian Expeditions
[<https://www.tasmanianexpeditions.com.au/>]

20. Walpole Wilderness Adventure Tour	Elements	Description
<p>Embark on an adventure through the heart of the Walpole Wilderness.</p> <p>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.</p> <p>Your tour includes entry into the Valley of the Giants Tree Top Walk, including exclusive behind-the-scenes nocturnal tour.</p> <p>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.</p>	Days/Nights	5D/4N
	Length	4-5 hours per day
	Accommodation	3 star
	Inclusions	Transfers; meals; snacks; accommodation; equipment
	Type	Guided
	Region/s	South West Great Southern
	Trail/s	Valley of the Giants trail network
	Market Segment	Active Lifestyle Adrenaline Seekers
	Market Source	Domestic International

Opportunity

When complete, the Valley of the Giants trail network will include a range of cross-country MTB trails, sections of the Munda Biddi Trail, the Bibbulmun Track, and other hiking loops.

The Frankland River runs through the heart of the Wilderness area and includes rapids and boulders. It connects to the Frankland River hut on the Bibbulmun Track.

There may also be an opportunity to develop a bikerafting package that incorporates two of the trail activities.

Camping (rather than chalet accommodation) is also be possible for this experience.

The feasibility of this product is currently under investigation.

CASE STUDY

Multi-outdoor sports adventure (Scotland)

Welcome to the Highlands. A week full of adventure sports with a discovery of Scottish nature thanks to outdoor activities. A mix for adventurers looking for thrills and wide open spaces.

Your adventure starts with canyoning in an amazing gorge, followed by recovery time in a local whisky distillery.

The next day we embark on a rafting trip into one of the region's iconic rivers, before transferring to our next destination. We then take to our pedals on a 20-40km bike ride through the heart of the Cairngorms.

Day four sees us hiking (or skiing in season) one of Scotland's highest peaks; and day five we canoe along a beautiful section of the River Spey. The trip's not done yet - time to hike one more peak!

PRICE: \$2,100pp (8 days)

WEB: www.adventures-scotland.com/tour/multi-outdoor-sports-scottish-adventure/



Image Credit: Adventures Scotland.
[www.adventures-scotland.com]

21. Ultimate South West Adrenaline Tour	Elements	Description
<p>Get ready for the ultimate adrenaline hit. Five days jammed packed with extreme outdoor adventure.</p> <p>We kick off our trip in Perth with two days shredding the downhill trails in the Perth Hills and Dwellingup.</p> <p>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).</p> <p>We top that off with another day in the surf followed by abseiling and caving.</p> <p>Our final morning we hit the trails for a run (or a slow walk!) through the Boranup Forest before returning to Perth.</p> <p>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.</p> <p>Trips cater to all skill levels, with expert instructors on hand to provide coaching tips and advice.</p>	Days/Nights	5D/4N
	Length	4-5 hours per day
	Accommodation	3 star
	Inclusions	Transfers; meals; snacks; accommodation; equipment
	Type	Supported
	Region/s	Perth Peel South West
	Trail/s	Calamunda Camel Farm Dwellingup MTB Trails Margaret River region
	Market Segment	Adrenaline Seekers
	Market Source	Domestic International

Opportunity

There is an opportunity to curate an extreme outdoor sports itinerary that incorporates mountain biking with rock climbing, surfing, trail running and coasteering.

A supported trip with expert instructors/guides will enable visitors with different skill levels to participate in the same activity. For example, experienced mountain bikers can ride the blue and

black trails, while intermediate riders can select green and blue trails.

Similarly, experienced surfers can hit the outer break, while novice surfers can receive instruction near the shore.

The social side of the trip is equally important, providing lots of time to banter, swap stories, and enjoy local food and beverages.

CASE STUDY

Cycle Surfari (France)

This is hassle-free cycling with a dedicated Ticket to Ride support vehicle carrying the load between pitstops, and on hand for any equipment problems! While our Trip Leaders will guide you from stop to stop on the itinerary, the support team will be setting up camp in anticipation of your arrival. Expect your own private tent, bedding, full-board meals (including a packed lunch to fuel you on the road), some home comforts and a warm welcome on your arrival.

As well as cycling, post and pre-cycle surfs will be organised, all with in easy reach of our hand picked camping spots. Explore new lands and take in the sights on these awesome cycle tours, whether your a lycra enthusiast or new to the sport, everyone's welcome!

PRICE: xxx

WEB: www.tickettoridegroup.com/



Image Credit: Ticket to Ride
[<https://www.tickettoridegroup.com/>]

22. Transformative Retreat	Elements	Description
<p>Join us for a truly transformative experience in one of the world's unique biodiversity hotspots.</p> <p>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.</p> <p>Daily activities include stand-up paddleboarding, wild swimming, hiking, forest bathing, and cycling.</p> <p>There's plenty of time for relaxing in the afternoon. Enjoy a massage, spend time journaling, and move at your own pace.</p>	Days/Nights	3D/2N
	Length	3-4 hours per day
	Accommodation	Glamping/Unique
	Inclusions	Transfers; meals; snacks; accommodation, all activities
	Type	Guided
	Region/s	South West
	Trail/s	Margaret River region
	Market Source	Domestic International

Opportunity

The *Future of Global Tourism Demand* report reveals that over a quarter of Out of Region travellers are interested in wellness retreats. This experience represents a strong yield opportunity, attracting audiences with higher incomes. The market skews heavily female, and younger age groups (under 40).³

The report reveals that "transformation" is a motivation for travel. Other key motivations include

"reconnection", "into nature" and "exploration".³

There is an opportunity to develop a multi-experience product that builds on the Margaret River region's growing reputation for regenerative tourism, quality regional produce, and wellness activities.

There may be an opportunity to develop a similar product across all regions.

CASE STUDY

Transforming Experience with Yoga and Adventure Elements (Croatia)

A thoughtfully designed retreat to deliver an exceptional experience, a blend of adventure and insight. A unique holiday that has the power to transform your life. Join this retreat in the splendid beauty of Croatia's nature to discover the language and wisdom of the elements in your life. Be nourished, inspired, and empowered by every day yoga program and amazing excursions.

The program gives you the taste of Rovinj's rich history but also takes you to destinations far from the crowds, hidden small islands, and your own sunset sky. Temperatures call for wise movement, refreshing sea, and shady trees. And that is exactly the rhythm of the retreat. All adventure programs are guided by us. Equipment is the best there is for each adventure. Professional and personal care is yours to enjoy.

PRICE: AU\$2,159pp (7 days)

WEB: www.bookyogaretreats.com/5-elements-retreats-yoga-and-adventure/7-day-transforming-experience-with-yoga-and-adventure-five-elements-retreats-in-rovinj-croatia



Image Credit: BookYogaRetreats. [www.bookyogaretreats.com]

END NOTES

1. This definition has been taken from Nordbo et al (2014) and modified to exclude walks of less than 30 minutes in line with the definition used by New Zealand Tourism (2014). See: Nordbo, I., H. Engilbertsson and L. Vale (2014) "Market Myopia in the development of hiking destinations: the case of Norwegian DMOs", *Journal of Hospitality Marketing & Management*, 23(4):380-405; and New Zealand Tourism (2014) Tourist Special Interest: *Walking and Hiking*. Released: February 2014.
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OTHER OPPORTUNITIES

The following experiences have been identified as potential opportunities for the intrastate Destination Trail User and the Trail User While on Holiday market.

EXPERIENCE	DESCRIPTION	TRAIL/S	MARKET
Overnight Hikes			
Overnight trekking with a pack	Guided hiking and camping with a pack (rather than using accommodation)	Cape to Cape Track Bibbulmun Track Wiilman Bilya	Active Lifestyle (Intrastate)
Overnight hikes for beginners	Guided hiking and camping with a pack for those who've never done it before. Well suited to families.	Cape to Cape Track Wiilman Bilya Bibbulmun Track	Active Lifestyle (Intrastate)
Overnight luxury hike for couples	Hike to a unique accommodation venue (e.g. tiny house, stargazer dome, vineyard)	Cape to Cape Track Bibbulmun Track	Active Lifestyle (Intrastate)
Day Hikes			
Guided Day Hikes	Half-day hike with mixed groups from an existing high visitation site. Similar product on offer in Perth Hills and Margaret River, this experience fills gaps in experience offerings in other locations.	Tree Top Walk Bald Head Wiilman Bilya	Leisure Walkers
Food & Art	Day hike with grazing platters and an art class in the open air (en plein)	Cape to Cape Track	Leisure Walkers
Night Hikes	Guided hiking tour at night with a focus on nocturnal wildlife and stargazing	John Forest National Park Cape to Cape Track	Leisure Walkers
Foodies Hike	Half-day hike to a vineyard with premium food and beverages. Could include picnic style grazing in the open air, or platters in a cellar door setting	Margaret River Great Southern (utilising trails on private property)	Leisure Walkers
Trail running			
Trail running clinics	Overnight trail running experience that includes workshops and presentations on topics such as footcare, pack packing, nutrition, as well as coaching sessions.	Cape to Cape Track Bibbulmun Track John Forest National Park	Intrastate
Cycling			
Gravel riding clinics	Overnight gravel riding experience that includes coaching sessions and daily rides	Munda Biddi Trail	Intrastate
Road Cycling Tours	Overnight road cycling experiences incorporating country roads and dedicated cycle ways	Various	Intrastate
Downhill MTB Clinics	Overnight downhill MTB experience that includes coaching sessions and daily rides	Perth Hills Dwellingup	Intrastate
Paddling			
Geographe Bay Kayaking Tour	Overnight sea kayaking experience from Busselton Jetty to Cape Naturaliste, with luxury accommodation along the Geographe Bay coastline	Leeuwin-Naturaliste National Park	Intrastate
SUP Yoga Retreat	Overnight yoga retreat with a focus on stand-up paddleboard yoga	Leeuwin-Naturaliste National Park	Intrastate
Swan River Luxury Paddle	Overnight kayaking trip along the Swan River - paddle straight to your luxury accommodation and enjoy a chef prepared meal	Swan River	Intrastate



Image Credit: Tourism Western Australia