CONCENTRIC CIRCLES

Guidance for Trails Tourism Close to Perth

FINAL REPORT | May 2024

On behalf of all Western Australians,
the authors of the Concentric Circles Report acknowledge and value the heritage, culture and spiritual connection of Aboriginal people with the lands and waterways through which trails pass. We acknowledge Aboriginal people as the Traditional Custodians and pay our respects to Elders past, present and emerging.

This *Concentric Circles: Guidance for Trails Tourism Close to Perth* report has been prepared by TRC Tourism for the Department of Local Government, Sport and Cultural Industries.

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ACKNOWLEDGEMENT

We acknowledge the Indigenous peoples of the lands, waters and communities we work together with. We pay our respects to their cultures; and to their Elders – past, present and emerging.

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Front cover image: View from atop Wongborel / Mount Brown looking over the township of York, Wheatbelt Region, Western Australia.

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Contents

New shared use Dwaarlindijrraap Bridge, a pedestrian and cycle swingbridge over the Murray River at Lane Pool Reserve, part of the Adventure Trails offering at Dwellingup

1. Executive Summary

As the most densely populated location in Western Australia, metropolitan Perth naturally represents the largest source market for trail recreation visitation to adjacent Wheatbelt and Peel regions.

As the demand for trail-based tourism grows and Perth residents look to their nearest regions for more and more varied trail-based recreation, so too has momentum for developing trail-based infrastructure in the regions, fuelled by the recognised economic and social benefits that trail development facilitates.

The inner Wheatbelt and Peel regions offer significant potential for attracting intrastate trail-based tourism in an era where people are seeking the premium of remoteness, wilderness and nature-based activity. Equally, the establishment of quality trail experiences has the potential to diversify regional economic income, support business and community enterprise development while also serving community liveability and amenity needs.

This report applies a Concentric Trails Study Methodology in order to develop a high-level strategic roadmap that can guide trail destination management and domestic trail visitation into the future aiming to achieve the right trails for the right users, in the right place, at the right time.

Generally, the study concludes that there are logical time bands that guide inbound visitation to a region:

- 30 minutes to an hour for short trip, health and wellbeing trips
- 1-2 hour preference for day trips
- 2-3 hour for weekend trips

Other key findings include:

- Trail destination preferences likely differ according to a geographical split between Perth's northern and southern metropolitan regions, as the factor of travel time differs for each source market.
- Quality, variety and amount of trail are equal factors in trip intention decision making alongside travel time / accessibility.
- Factors that also dictate a visitor's destination-based decision include the availability of added value attractions, accommodation and catering supply, event motivators and ease of access.
- The adoption of a hub and spoke model is recommended to guide aspiring trail destinations in how to develop trails and supporting tourism facilitation appropriately.
- Critical to appropriate trail development and prioritisation is coordination between regions, LGAs and destinations.
- Identifiable epicentres have emerged for trail-based visitation centred on Dwellingup (southern zone), York (eastern zone, developing) and Bindoon (northern zone, developing) with a significant skew towards mountain biking development in these places.
- These destinations are adequately located at sufficient proximal distances that justify ongoing investment in their growth without risk of source market cannibalisation or trail oversupply.
- There exists significant development potential for lifting Jarrahdale's trail offering in the walking trail space to a Regional level.
- Toodyay, Northam, and Boddington warrant ongoing development with a strategic lens of ensuring investment is directed appropriately to strengthen diversification, improve connectivity; and support trail tourism facilitation.
- There is an experience gap in the Dryandra region with development potential based on a collectivisation of attractions and nearby facilitation centres in a zone format
- A major gap exists in the storytelling and representation of Aboriginal cultural and heritage linked to trail experiences.
- Longer distance adventure riding (gravel grinding, bike packing) offers a significant market opportunity.

2. Recommendations Overview

1	Support for trail development should meet strict trail destination development criteria across landscape suitability, community support, existing in-use infrastructure, Traditional Owner support, master planning and strategic planning support, identified funding channels, and proximal considerations of not being located within one hour of similar trail destination/s.
2	Strategic focus on primary mountain biking trail clusters of Bindoon, York and Dwellingup and associated trail network destinations. Consideration given to supporting added-value ride hubs only where located a minimum of >1-hour drive (70-100km) away, and other development criteria as above are met.
3	Strategic focus on existing walk clusters and associated township service centres, specifically opportunities to develop walking trail options in Bindoon/Chittering, Toodyay/Northam/Avon, Jarrahdale-Serpentine and others connecting to the Bibbulmun Track. Focus on 1-3 day (i.e. weekend stay) trail experiences.
4	A focus on improving hero linear trails to better serve short trip, day trip and 2-3 night experiences, including addressing connectivity with townships and trail nodes, improving quality of experience with a preference for developing cloverleaf, loop, stacked loop trail development.
5	Develop a quantitative framework for categorising hiking trail destinations as Local, Regional or State/Signature, as per existing mountain bike trail hierarchy guidelines.
6	Conduct Full Trail and Capacity Audit across trail-relevant LGAs
7	Establish Wheatbelt Trails Working Group (inner Wheatbelt coverage)
8	Develop a Wheatbelt Trails Destination Strategy/Masterplan (inner north, east and south region focus) to mirror the existing Peel Regional Trails Strategy.
9	Continue the coordinated trails development approach in the Peel Region through ongoing implementation/review of Peel Regional Trails Strategy, and continuation of Peel Trails Committee as a coordinating body for the region
10	Develop and promote trail-based itineraries based on short, day trip and overnight trail destinations using Wedge Dispersal Model for priority identification.
11	Identify and invest in opportunities for the increased development of Indigenous cultural attractions and storytelling attached to trail destinations.
12	Coordinate Inter-LGA and Inter-Region Trail Marketing Activity
13	Develop trail marketing content campaign based on Concentric Circle Arc via Trails WA channels
14	Identify and develop accommodation potential and capacities in trail destination townships and transit nodes
15	Identify and seek solutions for hospitality and tour workforce accommodation
16	Support development of Long Distance Adventure Cycling Experiences including the development of a State-Wide Long Distance Adventure Cycling Strategy (Gravel Grind and Bike Packing/MTB Touring)
17	Identify the potential to grow or establish new trail-based events to drive visitation
18	Recognise and plan for 1. three-zone destination structure - North, East, South to better inform marketing and information campaigns; and 2. Two-zone source market structure (North and South Perth)
19	Support ongoing development of York MTB Trail Concept Planning with further investigations into upgrading walking trails and feasibility of summit trail with a view to achieving Regional status.
20	Identify and develop Dryandra Zone including Dryandra Woodlands, Narrogin and Pingelly as an adventure cycling (gravel grind / bike packing) zone, establish best suggested routes/itineraries

3. Introduction

3.1   The Project

Significant growth in outdoor recreation has seen more people pursuing quality trails tourism experiences close to Perth, particularly in hiking and mountain biking.

The 1-2 hour travel arc from metropolitan Perth provides opportunities for metropolitan residents to pursue a broad range of trail-based activities that are easily accessible as day and overnight trip options.

The increasing interest in, and demand for trails has highlighted the need for a more coordinated approach to trails tourism destination developments in the 1–2-hour travel time zones around Perth.

This Concentric Circles project represents a sub-regional plan that supports the State's guiding/strategic documents. It aims to ensure well-planned trail projects provide quality experiences for users, to best leverage and support existing trail destination attractions, and to address challenges in the potential for overconcentration of trail development in co-located regions.

Having a coordinated approach will ensure land managers, regional and tourism organisations and user groups are able to work cooperatively and cohesively to create better experiences for visitors and better outcomes for community, rather than diluting offerings by competing for the same markets.

3.2   Scope

Region

The geographical scope of this study covers the Wheatbelt Region as defined by Wheatbelt Development Commission and the Peel Region as per boundaries identified by Peel Development Commission.

Activities

The scope of this study is defined by two types of trail-based recreation:

- Hiking (bushwalking and trail running); and
- Mountain Biking

While important to trail tourism planning and economies, horse riding and motorised recreation are not within the scope of this focused study. As such this report does not make recommendations pertaining to horse riding trails or equine tourism or motocross. BMX is also not included, being restricted to small-footprint trail infrastructure and not considered a significant motivating factor for tourism-based travel.

Adventure cycling in the form of gravel grinding and bike packing will be reflected upon as they are increasingly considered as sub-sectors of mountain biking and tourism drivers in the space of nature-based cycling.

Nomenclature

For this study, subject locations will be identified as 'trail destinations' as general terminology encompassing destinations that have a recognised level of trail attraction and infrastructure, or intend to.

For the purposes of planning, *WA Strategic Trails Blueprint 2022-2027* classifies trails and trail networks into three significance categories: State Trails; Regional Trails; and Local Trails.

Further, it identifies trail clusters with associated parameters: Trail Town; Trail Centre; Trail Network.

Trails WA also has a 'Trail Town' accreditation program applied as a tailored, best practice accreditation system designed to help communities become world class trail tourism destinations. The accreditation process includes an application process across six categories.

This study does not necessarily seek to apply the Trails WA classification, and thus will distinguish destination subjects by using the term 'trail destination', which may still include reference to significance categories or cluster categories.

Trail classification inclusions

The purpose of this study is to help strategically grow intrastate tourism via trail recreation and visitation and guide trail infrastructure development to support tourism outcomes. As such, the classification of trails considered by the report is generally limited to State and Regional trails. It does not specially address the development of Local trail networks, although it does recognise the importance of Local trails and the benefit to their community. It also recognises the important role Local trail networks play in supporting State and Regional Trails as added value experiences, dispersal motivators and in providing connectivity between trail destinations and townships.

Exclusion of any trail network in this report does not necessarily imply that these networks should not be invested in, maintained and promoted for the benefit of all. Indeed, some Local networks should be proactively developed, with investments reflective of any identified role those networks can potentially play in regional trail and travel behaviour connectivity.

3.3   Background

Responding to significant growth in both trail recreation and trail infrastructure planning and development, TRC Tourism was commissioned by the Department of Local Government, Sport and Cultural Industries to create a concentric circles-based planning framework that assists trail destinations in the Wheatbelt and Peel regions to better plan and coordinate recreational trail development.

3.4   Methodology

TRC Tourism undertook a three day in-situ visit of the Wheatbelt and Peel Regions to attain a foundational understanding of the regions and their existing trail offers.

Two regional workshops and one Perth-based workshop were hosted, inviting land and trail managers, LGA representatives, tourism, and outdoor recreation organisations to participate in discussion around trail planning and the concept of a concentric circles framework.

Desktop research was conducted, investigating regional trail planning, strategies, planned developments and management status.

Research was also conducted into precedent studies on concentric planning principles, underlying visitor source markets, activity demand and trail user preferences.

Trail check: scoping final touches to trail works at the new Bindoon Mountain Bike Park, in Chittering, Wheatbelt Region Western Australia

4. Strategic Context

This report – and the development of trail tourism across Western Australia – is guided by a number of stakeholders and collection of primary documents that give frameworks, strategic, and specific trail development direction for any trail destination wishing to further trail-based experiences in their region.

4.1 Guiding Strategies and Plans

Communities wishing to develop trail infrastructure should always engage with the appropriate Traditional Owners and land managers at the very beginning of any project. This ensures best outcomes for sustainable development, cultural, heritage and environmental outcomes and offers best pathways for identifying and being successful in achieving funding streams to realise a project.

As a matter of priority, the foundation documents below should always be referenced and reflected upon from the beginning of and throughout any trail planning process.

Western Australian Strategic Trails Blueprint 2022-2027

Provides the strategic framework for the development of the state's trail network, aims to increase the contribution that trails make to the visitor economy.

Trail Development Series

Series of documents outlining the required process of trail development in Western Australia, presented as a four-part series:

- Part A: A Guide to the Trail Development Process
- Part B: A Guide to Community Consultation
- Part C: A Guide to using Multi-Criteria Decision Analysis (MCDA)
- Part D: Checklists and Templates

Western Australian Mountain Bike Strategy – Mountain Biking and Off-Road Riding in Western Australia 2022-2032

Identifies 59 recommendations to assist the sustainable development of mountain biking and off-road riding across Western Australia.

West Australian Mountain Bike Management Guidelines

Tool for land managers, trail professionals and mountain bike groups by providing guidance to ensure a consistent approach to planning, designing, constructing, and managing sustainable mountain bike trails across the State.

WA Hiking Strategy: Bushwalking and trail running in Western Australia 2020-2030

Provides direction for the sustainable development of hiking activities and associated trails' infrastructure in Western Australia.

WA Trails Market Research 2021

Provides an understanding of Western Australia's existing proposition as a hiking and mountain biking (MTB) trail tourism destination with insights to Tourism WA and the Regional Tourism Organisations to develop effective marketing messages and campaigns to promote Western Australia as a trails destination.

Regional strategies and plans (Collection)

A number of masterplans and strategies apply to Local Government Areas across the study area, each of which have been reviewed for status of trail development and directions. Not all LGAs or regions are covered by trails masterplans. Documents are referenced in Appendix A.

4.2   Tourism Planning

There are a number of important plans that inform tourism planning across Peel and Wheatbelt regions:

- THRIVE 2030 - The Re-imagined Visitor Economy
- JINA: Western Australian Aboriginal Tourism Action Plan
- WA Recovery Plan 2020
- Plan for our Parks 2019
- Peel Development Commission Strategic Plan 2020-22
- Regional Development Strategy 2016-2025
- Peel Regional Investment Blueprint 2050
- Peel Tourism Investment Framework
- Wheatbelt Development Commission Strategic Plan 2020-2023
- Wheatbelt Blueprint

It is recognised that there is a Destination Perth Tourism Destination Management Plan currently in draft including sub regional plans and development strategies that cover the Peel and Wheatbelt regions. The report and its recommendations are unavailable at the time of writing however it is likely to contain trail-relevant tourism recommendations pertinent to this Concentric Circles strategic analysis and should be referred to.

There are also many City and Shire plans that attend to tourism priorities for municipalities.

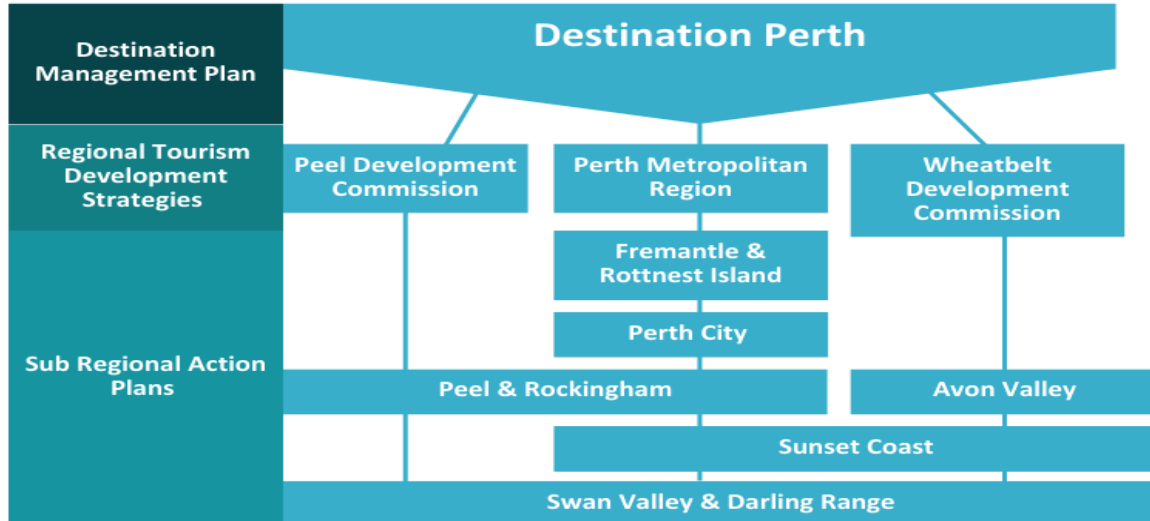Figure 1: Tourism Strategy Hierarchy for the Destination Perth Region

TABLE 1 TABLE: TOURISM STRATEGY HIERARCHY FOR THE DESTINATION PERTH REGION

4.3   Destination Management

Destination Perth is the overarching Regional Tourism Organisation (RTO) for some (but not all) of the regions encompassed in this study.

Destination Perth is comprised of six subregions (with those relevant to this study in **bold**):
- Perth City
- **Swan Valley & Darling Range**
- **Avon Valley**
- **Sunset Coast**
- Fremantle & Rottnest
- **Peel** & Rockingham.

While Destination Perth features trail destinations, most of those promoted are within the Perth metropolitan area. It does promote:
- The Bibbulmun Track (numerous)
- Munda Biddi Trail (numerous)
- Swan Valley Walking Trails (Chittering)
- Mandurah & Peel Walking Trails (Peel)
- Toodyay Walking Trails (Toodyay)
- Yanchep Trails (Sunset Coast)
- Kep Track

The region is supported by two Regional Development Commissions (Peel and Wheatbelt) whose objectives are to develop and enhance the economic development of their respective areas.

4.4   Stakeholders

Western Australian Indigenous Tourism Operators Council – peak representative for Aboriginal tours and experiences in Western Australia.

South West Aboriginal Lands and Sea Council – and the six Noongar regional corporations and Noongar/Bibbulmun people it represents.

Department of Local Government, Sport and Cultural Industries – develops and implements government policy and initiatives in sport and recreation, while contributing to the healthy lifestyle of Western Australians by increasing physical activity through sport and recreation.DLGSC has the lead State responsibility for sport and recreation and works closely with other agencies and organisations to deliver community outcomes. DLGSC is a key stakeholder and contributor to policy, strategy and planning for hiking and mountain biking in Western Australia.

Department of Biodiversity, Conservation and Attractions – incorporating the Parks and Wildlife Service delivering land management operations across conservation and ecosystem management, parks and visitor services and regional and fire management services.

Wheatbelt Development Commission – facilitates long term development of the Wheatbelt by connecting government and the private sector through strategic projects aligned with business and community development.

Peel Development Commission – facilitates long term development of the Peel Region by connecting government and the private sector through strategic projects aligned with business and community development.

Local Government Authorities (LGAs) – work with local partners and community to determine and deliver local priorities and a range of services such as infrastructure, health, planning, and recreation, including local trail and paths development.

Trails WA – provides information, marketing and advocacy of trails in Western Australia and advocates for the trails sector, working collaboratively with partners in State Government, recreation, environment and the community.

Outdoors WA – the peak body for the outdoor sector in Western Australia, including outdoor recreation, outdoor education, adventure tourism and camping.

Tourism WA – the statutory authority responsible for promoting Western Australia as a tourist destination.

WestCycle – the peak body for cycling in Western Australia covering all cycling disciplines. Operates at a strategic level to lead and coordinate the growth and development of bike riding in Western Australia.

Destination Perth – Perth Region Tourism Organisation Inc., trading as Destination Perth, is the Perth region's peak destination marketing organisation responsible for promoting the city and surrounds.

**Trail User Groups –** including state representative organisations and regional/local clubs.

5. Concentric Circles

Concentric circles as a framework have been applied to this trails tourism project as a tool to analyse visitation and destination characteristics including: source market location; travel to destination times and behaviours; and location of trail destinations proximal to others, both competing and complementary.

5.1 Overview

What are concentric circles in a planning context?

- Technique that identifies and segments a core destination and/or its attraction(s)
- Concentric circles with an epicentre located in Perth Metro help identify and 'locate' a destination proximal to another (with a view to identifying as complimentary, competitive or neutral)
- Each circle represents a specific zone or level of attraction (linked to travel time), with the core area/market (Perth Metro) at centre
- Effective for developing tourism and trails in natural areas, such as national parks, forests, reserves and wilderness areas with reflection to facilitation nodes.
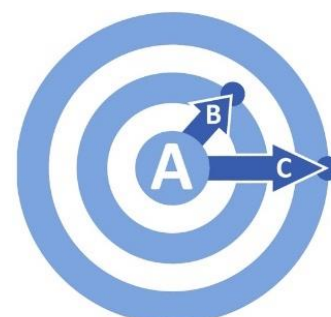
A = SOURCE MARKET
B = DESTINATION
C = DESTINATION
➡ TRAVEL TIME

What are the benefits of using Concentric Circles for tourism planning?

Efficient Resource Allocation

Concentric circles help to identify what resources may be needed for trail destinations and how to prioritise allocation. As the concentric circles expand outwards, resource allocation becomes less intensive, as areas become less central to the attraction. This allows planners to optimise resource allocation and ensure resources are used efficiently and effectively.

Improved Visitor Experience

Helps ensure that visitors have a clear understanding of the different levels of attraction in the area. This makes it easier for visitors to plan their visit and ensure that they see all of the key attractions in the area. It also helps to create a sense of progression, as visitors move from the core area to the outer circles.

Increased Visitor Satisfaction

Helps ensure that visitors have a high-quality experience in the most attractive areas. This can help to create a positive impression of the area and encourage visitors to return in the future.

More Effective Marketing

Identifies the key selling points of the area and uses them to promote the attraction to potential visitors. Concentric circles can also be used to create a series of marketing messages, each targeting a specific level of attraction. This helps to ensure that the marketing is targeted and effective, and that potential visitors have a clear understanding of what the area has to offer.

Sustainable Development

Ensures that the most sensitive areas of attractions are protected from excessive tourism development. This helps ensure that areas remain sustainable and that the natural resources are protected for future generations.

What are the benefits of using Concentric Circles for trails planning?

Efficient Trail Development

Helps identify the most important areas for trail development. This ensures that resources are allocated appropriately, used efficiently and that the trails are developed in the most attractive market-relevant areas.

Improved Trail Experience

Ensures that the trails are designed to identify and showcase the most appealing areas of the attraction. This helps to create a more enjoyable and engaging trail experience for visitors.

Increased Trail Use

Via improved experience delivery.

5.2 Concentric Application

This study considers three forms of Concentric Circle frameworks that can be used to assess trail-based tourism development.

Regional Locator

Applying foundational concentric circles to a geographical area aims to visualise and understand travel behaviour and proximity of trail destinations to the source market, in this instance, metropolitan Perth.

By identifying the source (place a visitor travels from) and the trail destination(s) (where visitors may travel to) we can assess how long it may take a source market to get to a location (based on car travel), and what, if any, clustering of trail destinations is occurring.

This helps create an understanding of market behaviour when reflecting upon preferred travel time investment matched to type of trail activity (walking, running, mountain biking) and travel modality (short trip, day trip, overnight).

The map below identifies that for the Wheatbelt Region all trail destinations assessed at Regional or above classification (visitor attractors), are located between 1 hour and 2 hours of metropolitan Perth. It shows that most trail destinations in Peel are within 1-1.5 hours of metropolitan Perth. Hence it dictates that to attract visitors, a destination must understand what visitors' motivations, expectations and behaviours are when they choose to travel 1-2 hours for trail-based recreation. This map also identifies the current trail destination status – which destinations feature a critical mass of trail infrastructure worthy of Regional or State classifications.

Map 1: Regional Locator
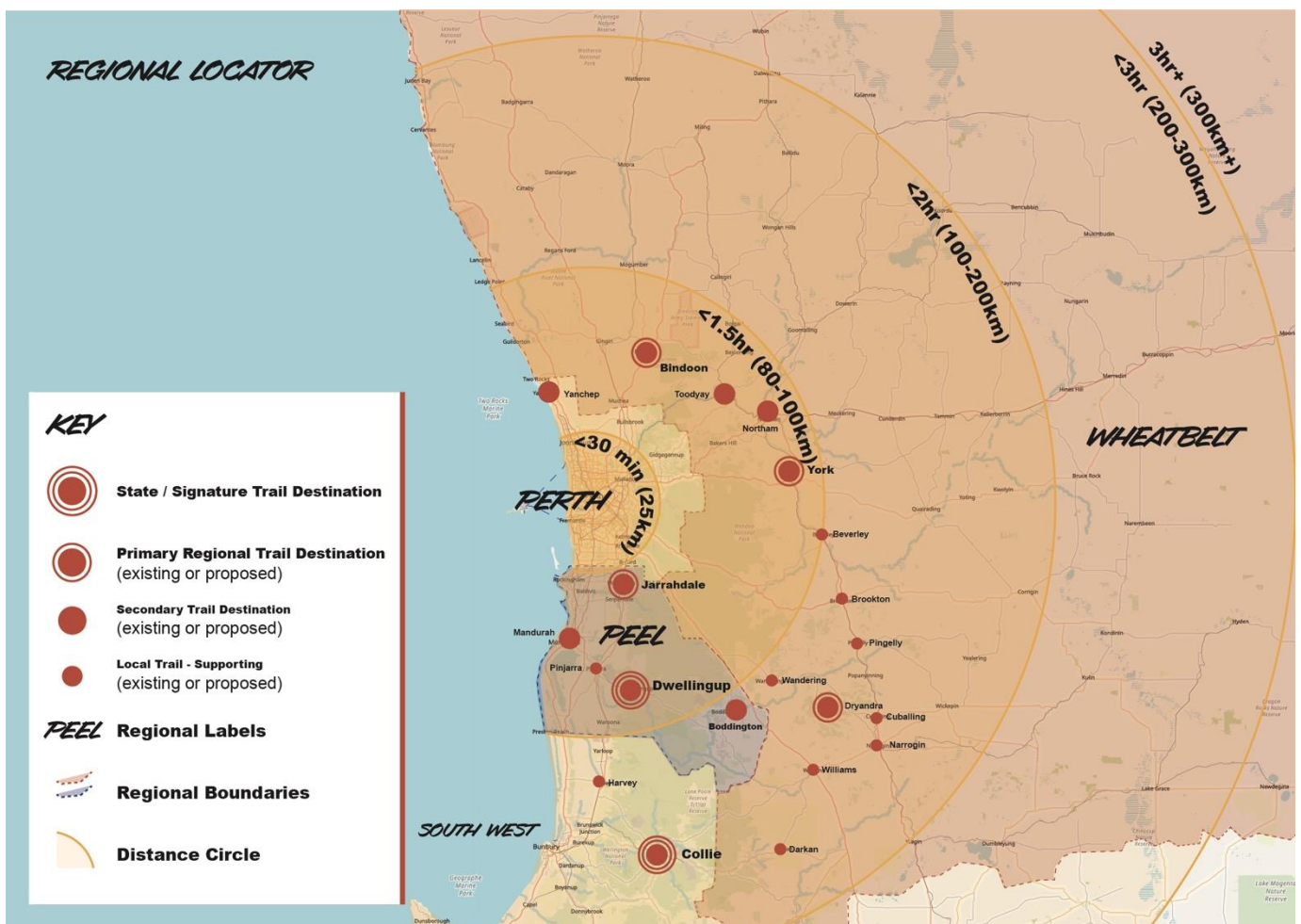
Proximal Locator

In understanding destination-based travel behaviour it is important to not only consider where a market source is and why they may travel to a destination, but also why they may choose an alternative destination offering a trail experience for an equivalent time investment.

This can be conceived as a competitive analysis, especially for short trip and day trip markets. However, it can also be viewed as a complementary destination analysis in terms of targeting longer stay / overnight markets: how can one destination attract visitors already visiting another, proximal trail node? This is not seeking to diminish visitation of the primary trail destination, rather it aims to understand how to best encourage dispersal of visitor engagement, extend stay and increase overall regional spend.

To create a 'proximal' understanding it is pertinent to apply the concentric circles with epicentres focused on each recognised major trail destination (regional or major local with developments in planning).

These have been identified as:

WHEATBELT

- Bindoon (Primary Regional - proposed)
- York (Primary Regional - proposed)
- Dryandra (Primary Regional – proposed. Currently undeveloped, suggested potential for specific development, supported by townships)

PEEL

- Dwellingup (existing State / Signature)
- Jarrahdale-Serpentine (Primary Regional – walking focus)

Map 2: Proximal Locator
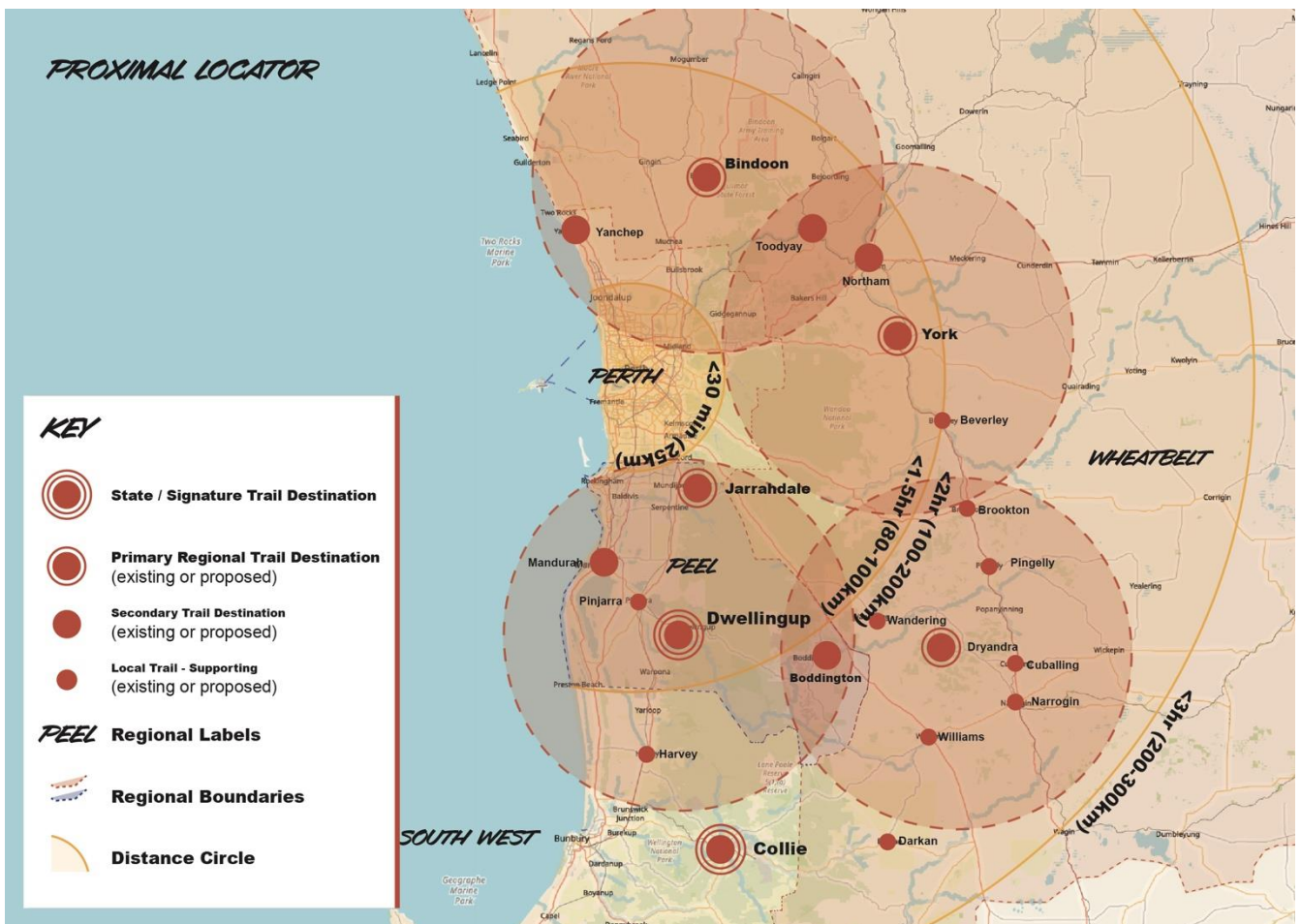
The map depicted prior does not identify several major trail destinations or hubs *within* the Perth Metropolitan area. These trail hubs (i.e. Goat Farm/Kalamunda, John Forrest NP) can act as a net barrier, their closer proximity to home addresses matched to quality trail landscapes and attractions can capture trail visitors and increase the challenge of attracting them beyond the Metropolitan Region.

These fringe metropolitan trail hubs should be considered when targeting particular trail visitors (i.e. mountain bikers), with strategies in place to leverage off or create competitive distinction from such hubs. For instance, mountain bikers regularly visiting Kalamunda / Goat Farm MTB trails may see Bindoon as a new and exciting location offering equally high-quality trail experiences and therefore choose to add the destination into their ride rotation. Gravel Grind adventure riders may be targeted with messaging that distinguishes Dryandra as a unique landscape very different to anything found closer to Perth.

Collie, to the south of Dwellingup is identified as a State / Signature destination to the immediate south of Peel Region with the $10 million development of the Collie Adventure Trails. Whilst out of scope for this study, its proximity to Peel Region, Dwellingup and location within 2-hour travel time of Perth, means it remains relevant when assessing potential trail developments in proximity.

So too, trail attractions in the Peel Region must consider the transitory nature of a large trail-based market segment whose primary target destination lies further south in the Margaret River Region.

Wedge Dispersal

Extending from the proximal model of concentric circle analysis, a 'wedge dispersal' model can be applied to conceptualise how a trail-based visitor may travel according to their potential engagement with multiple trail destinations.

A wedge overlay seeks to transform an 'out and back' travel itinerary reaching a single trail destination into a wedge, or 'piece of pie' travel itinerary that brings into play other trail (or non-trail) destinations.

This approach allows a perspective of guiding where trail or support services investments should be targeted to better cultivate tourism dispersal, extended stay visitation and increased regional spend.

The wedge dispersal model assists in understanding where a potential travel corridor can be cultivated and, in cases where a destination may not be able to compete or alternatively add *trail-specific* value to a nearby high quality trail node, it can still add value and attract visitation via investment focus on hospitality (accommodation and catering), other activities and attractions (cultural, heritage, food and wine) and events that leverage the initial trail-based visitation.

Map 3: Wedge Dispersal
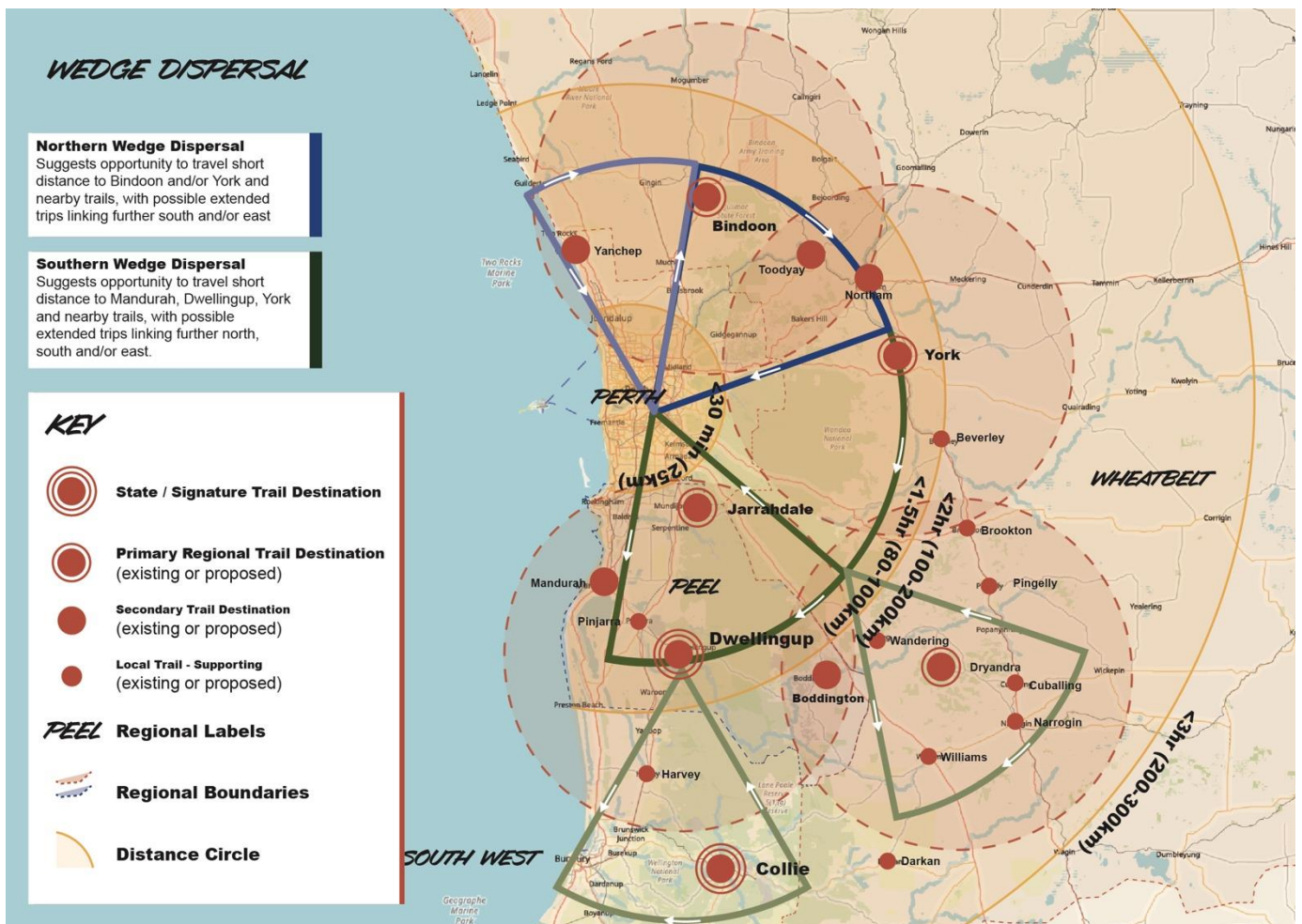
6. Travel Behaviour & Assumptions

There are no specific studies or data that capture average travel-to-trail times, distances travelled, or preferences of Perth-based visitors to regional (Wheatbelt and Peel) trail destinations.

It is important to recognise *inter-destination* movement (where tourists travel from an originating place to destination locations) versus *intra-destination* movement (where tourists move around to different attractions within a single destination – or in this case, co-located regional destinations).

Further, it is important to identify if a destination's strength is as an inter-destination attractor (i.e. Signature Trails or major trail hubs) or operates as an intra-destination attractor (i.e. local and regional trails).

Also to be considered is the significant impact of digital information in influencing destination decision making and influencing a tendency to travel to several places or participate in multi-attraction travel.

6.1   General research into travel behaviour highlights

- *Does Distance Matter? Examining the distance effect on tourists multi attraction travel behaviours* report[1] concludes from the reading of numerous other travel distance tourism behaviour studies that geographic distances are an important factor that tourists carefully consider when planning their trips, but equally a clustering of inter-related attractions also influences destination decisions.

- *Travel Distance: a Tool for Nature-Based Tourism Market Segmentation* report[2] identified market segments of nature-based tourists based on travel distance and disclosed that distant travellers tend to show a higher level of involvement in sightseeing activities.

- A study on Brisbane's peri urban park visitation[3] found that older visitors live closer to their destination parks while younger visitors travel further to use parks. Travel distance did not vary with the type of recreational activities that users were conducting in the park. People who live closer to a park tend to visit more often, but visit for shorter periods of time compared to those who live further away. Conversely, people who travel further to visit a park, especially larger regional and national parks, tend to stay longer, and undertake activities based on active recreation or socialising.

- Younger people travel further, in larger groups but less often. Older people travel less distance but more frequently[3].

- Visitors with more nature orientated values will travel further to access recreation park-based assets (lessening of distance decay effect) [3].

- There is increased pressure on (closer) peri urban parks and therefore dispersal of visitors to parks further afield is of strategic importance[3].

- Determining visitor usage and travel patterns for parks is important because it can greatly assist land managers in facility provision and demand-management for peri-urban sites, which in-turn affects the residential amenity of surrounding communities[3].

- Trail destinations proximal to older populations should plan and deliver suitable trail experiences for that demographic (shorter, more accessible) as this market will visit the most[3].

- There is no relationship between the distance travelled to the park and the activities that people engaged in, with no differences in the distance travelled between those going hiking, running or mountain biking[3].

- A US study found that more distant visitors participated more in viewing activities; were more likely to be first-time and day visitors; did less camping; spent more money on activities, private lodging, and

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[1] Deukhee Park, Jinwon Kim, Woo Gon Kim & Hyunjung Park, 2019
[2] Nyaupane and Graefe, 2008
[3] *The role of distance in peri-urban national park use: Who visits them and how far do they travel?* Rossi, Sebastian Dario, Byrne, Jason Antony, Pickering, Catherine Marina 2015

transportation; visited the destination less frequently; spent longer periods away from home; and had less place attachment than those traveling shorter distances[4].

- The majority travelled under 70km (35.6%). A sweet spot was 70-160km (28%). Distance decay (further distance, less likely to travel) applied from 160km, although percentage rose again (19.5%) for longer distances destinations of 1000km (the greater the time and money investment the longer the stay) [4].
- Very few short distance visitors spent money on lodging[4].
- Longer distance travellers tend to be between 41–60 years old[4].
- There is a clear pattern suggesting that distance and place attachment are reciprocal i.e. as distance increases place attachment decreases. Visitors who live close to the destination are more likely to visit attractions more frequently than distant visitors. This result is consistent with the gravity model in that, the closer one lives to a park, the more frequently they visit the park[4].
- In addition, the results showed that the frequency dropped significantly when the distance increased above 80km, which could be a threshold distance for frequency of visit[4].
- Number of days (overnights) increases with distance from source market[4].

6.2 Mountain Biking

- 50% of people travel between 30-60 mins to access their regular MTB trails[5].
- 87% of riders would ride more regularly if they had closer access to trails[6].
- Distance required to travel to access trails remains a 'barrier'[6].
- Responding to how far people usually ride when they mountain bike, 33% ride 11km-20km while 40% ride 21km-30km. For most people this would represent a ride of between 60 minutes to two hours duration[6].

This report makes the assumption that a 'day trip destination' for mountain bikers requires a minimum of 20-40km of available trail accounting for 40% riders and that up to 60 minutes travel time is a limit for 'regular' visitation.

Extrapolating, on an assumption of avoidance of repetition, a weekend MTB destination requires likely 40-80km as minimum and potentially can be 1.5hr – 3hrs drive time. It is generally recognised that an international Mountain Bike Trail Hub of Signature status requires 80km of trail within its networks and a supporting 'Trail Town' encompassing adequate long stay and activity facilitation.

6.3 Bushwalking

- Most bushwalking activity is in Perth and the South West.
- There is little data available on travel preferences of bushwalkers, although a NSW study in the 1980s showed that bushwalkers preferred to walk in small, informal groups, arrived at trailheads by car "covering considerable distances to reach their destination". It recorded an average of 2.4 hours spent participating in bushwalking and associated activities (representing an average of 10km per walk)[7].
- A study of the *overnight* walking market by TRC Tourism (2022) found that 60% of overnight walkers prefer daily distances of less than 12km. Nearly half of walkers prefer to walk 4-6 hours a day. A third of respondents preferred 3 nights or less for total trip.
- An iconic landscape is very important to those taking their own tent. Time spent walking is a factor for all, but less so for those using a provided shelter. Weather/climate is also a factor for people.

This report makes the assumption that a destination-based hiking visitor from Perth Metro would seek a minimum of 10km of trails with significant landscape and/or point of interest values to travel a short distance

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[4] *Travel Distance a Tool for Nature Based Tourism Market Segmentation (US),* 2010

[5] *WestCycle Mountain Bike Community Survey,* 2021

[6] *WA Mountain Biking Strategy,* 2022

[7] *Bushwalkers and trail hikers*, Garrard, I.M. 1982

(<30 minutes travel); 15km+ for a day trip assuming 30 minutes to 2 hours travel and 25km+ of available trail experience for an overnight trip. This assumes an average of 3-4km/hour walking pace and adequate levels of trail quality and features of interest.

6.4   Trail running

- Most trail running in Western Australia is undertaken in Perth and regions – with no recorded delineation between Perth, Wheatbelt and Peel. Margaret River and the South West region also hold strong appeal for trail runners with the State's largest trail running event, Margaret River Ultra with more than 1500 participants, taking place there.
- Consultation with Perth-based trail running community indicates that most trail running for training / recreational purposes occurs closer to Perth (Perth Hills i.e. Bells Rapids (Avon Valley), John Forrest etc), with events or extended (30km+) signature trails or networks being a primary catalyst for motivating extended and overnight travel further afield.
- Trail runners travel specifically to engage in their pursuit with 87.9% making a journey with the express purpose of running trails[8].
- When it comes to where to *train*, trail runners in the majority will travel 1-2 hours to reach their preferred singletrack site (41.8%). Another 12.7% will travel more than 2 hours. 29.8% prefer to only have to travel less than 30 minutes while 15.8% run on trails located in their immediate vicinity.
- When considering time willing to be *travelled for an organised trail running experience* (event, camp, tour), respondents go to great lengths: 38.2% would travel 2-4 hours. 28% 1-2 hours, 15.5% more than six hours. 27.5% would also travel interstate while 25.5% would travel internationally.
- 30% of trail runners intending to compete in an event travel to a race location prior to train on the course[9].

This study makes the assumption that a trail runner requires slightly increased minimums of available trail distances at a destination ranging from 10-15km for a short trip (<30 minutes), 20km-40km+ for a day trip with 1-2 hours' drive time and 40-100km+ for multiday trail running excursions.

6.5   Contextual considerations and exceptions

Exceptions to general distance vs. time investment guides for all activities can be considered when a trail destination offers a laser focus on higher quality of experience, a higher concentration of points of interest/landscape features and/or concentrated variety within a lesser-distance network, supported by higher quality/diversity of off trail amenity and added value attractions and services.

Downhill MTB Parks require a concentration on quality and features of trails rather than pure distance, along with supporting trail infrastructure (jumps trails, pump tracks, skills parks). Flow trails are assessed on both length and trail features equally, whereas XC mountain bike trails require increased distances and raw technicality, with less manicured features, to be attractive to the target rider.

A shorter trail network with a higher concentration of features i.e. waterfalls, viewpoints, cultural interpretations will be of higher attraction value to walkers/trail runners than a longer trail network with fewer features or topographic interest. Stirling Range Ridge Walk in the Great Southern region is a clear example where Perth Metro residents will travel 5+ hours to engage in multiple short walks of 3-7km and up to 25km for the full Range Ridge traverse, lured by spectacular high mountain views not on offer elsewhere.

The layout of trail network also affects magnetisation to a trail destination – a stacked loop or a cloverleaf trail network is of more attraction weighting than an end-to-end trail that requires either transfer logistics to return from a finish point or an out and back journey that is often not as appealing, especially for walkers/runners, but also for mountain bikers who generally prefer single direction trails for safety.

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[8] *Trail Running Market Snapshot 2013,* Adventure Types
[9] Rapid Ascent, event operator statistic

Dwellingup Trail and Visitor Centre, Peel, Western Australia
IMAGE: Tourism WA

7. The Market

7.1   Source Market

Given proximity of between 45 minutes and 3 hours' drive, the biggest source of visitation to Wheatbelt and Peel regions is from metropolitan Perth.

95% of visitors to the Wheatbelt in 2020/21 were intrastate, although this was impacted by COVID for the period. However, pre-COVID 2016-2018 visitation averaged 89% for intrastate[10].

96% of visitors to the Peel Region in 2020/21 were intrastate, also impacted by COVID for the period. However, pre-COVID 2016-2018 visitation remained at 88% for intrastate[11].

It is not known the percentage sourced specifically from Perth metropolitan (as opposed to inter-regional) however logic applies that as the biggest population centre in WA and the closest to the study market, that the majority would be from Perth metropolitan.

Metropolitan Perth

Perth city is located on the Country of the Whadjuk Noongar people, who have lived for at least 60,000 years. The Noongar people refer to Perth as Boorloo.[12]

Greater Perth is home to just over two million people (2,224,475, population density of 346.5 people per square kilometre), 77% of the state's population. This is forecast to grow to 2.9 million people by 2031 and 3.5 million people by 2050, becoming the third largest city in Australia after Sydney and Melbourne.[13] It currently ranks as the 6th most liveable city in the world and is the only Australian city to receive a perfect score in three categories (Healthcare, Education and Infrastructure) according to the Global Liveability Index 2021.

The Perth Metropolitan areas with the highest density[14] at June 2021 were:

- Perth (North) - Highgate (4,100 people per sq km) in Perth's inner north
- Scarborough (3,700) on Perth's north-west coastline
- Tuart Hill - Joondanna (also 3,700) in Perth's inner north

In the three-year data analysis by KPMG, Swan saw the ninth biggest change in population nationally, with a 15,600 increase since 2019. In Perth's eastern metropolitan region, the area saw an increase of 3.4 per cent annually between 2019 and 2022, with a total of 161,000 residents calling it home by December.

Wanneroo and Armadale both followed Swan as some of WA's fastest-growing regions, marking an 11,700 and 9,900 increase respectively.

In general, Perth's north-west, north-east recorded highest growth. Northern Perth (specifically Highgate and Scarborough) had highest density while East Perth recorded highest density in the centre[15].

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[10] Tourism WA, Overnight Visitor Fact Sheets 2021
[11] Tourism WA, Overnight Visitor Fact Sheets 2021
[12]https://artsandculture.google.com/entity/perth/m062qg?hl=en
[13] https://perth.wa.gov.au/en/future-perth
[14] https://www.abs.gov.au/statistics/people/population/regional-population/latest-release
[15] https://www.abs.gov.au/statistics/people/population/regional-population/latest-release

Source Market Zoning

As Perth's population density and residential spread increases, it is important to recognise the impact such growth has on travel times to regional trail destinations and likely visitation behaviour. In applying a concentric circles lens to the study, it is practical to consider not one but two centres of source market, one being from the northern population centre of Perth and one from the south. Given travel time increases exponentially the longer a visitor has to travel through metropolitan Perth, a visitor in residing south of the Swan River has easier and quicker access to trail destinations in the south and east. Those in the north have easier and more expedient travel to attractions in the north and east.

Map 4 (right):
Perth Metropolitan Source Market Area

Map 5 (below): Perth Markets
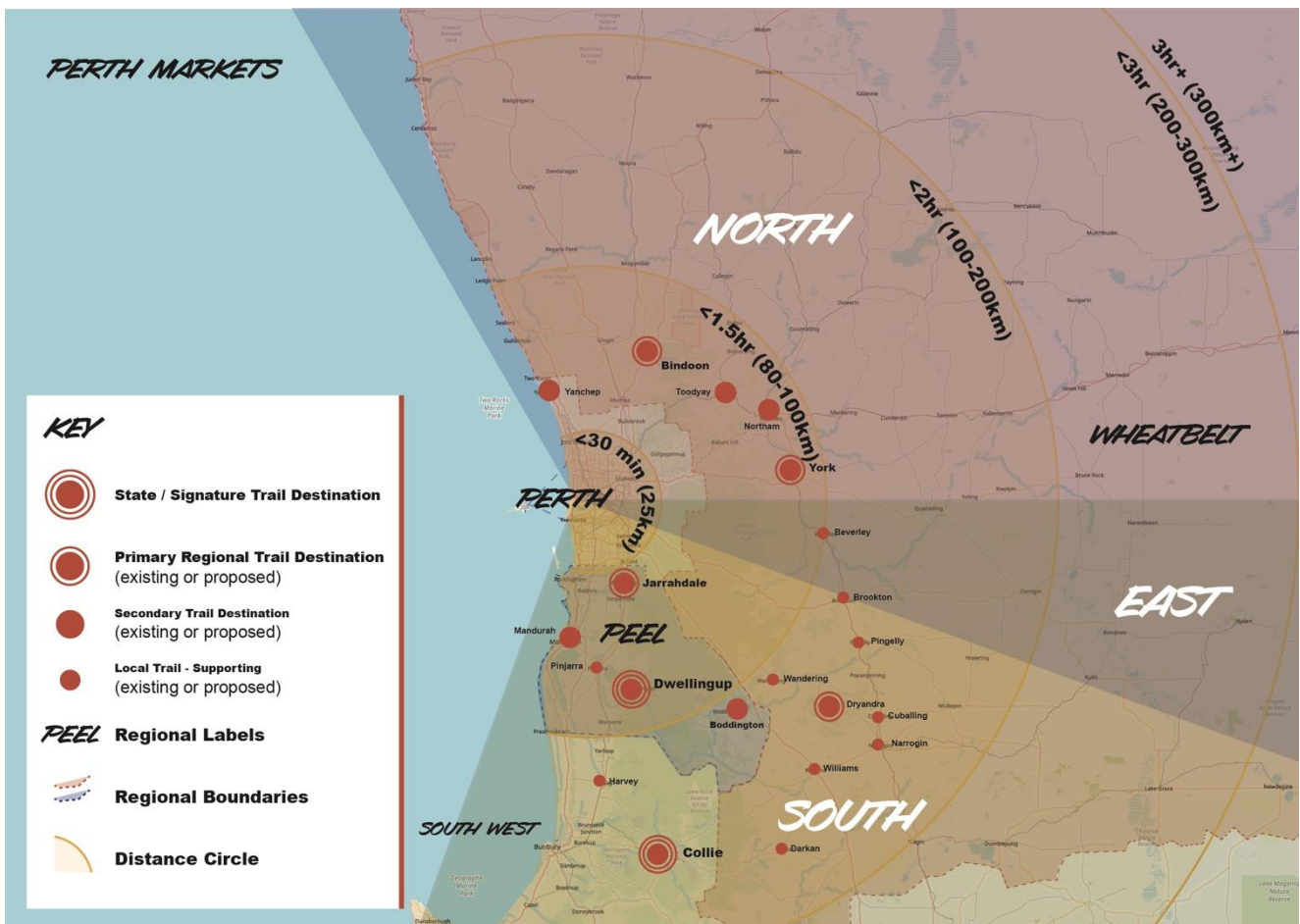
Competing or complementary? Kalamunda MTB trails on the outskirts of Perth vie for target market visitation with regional trail destinations

7.2   Trails Market

According to recent data[16] many Australians are favouring participation in informal recreation over structured sport. Trails offer more flexibility than traditional sports, as users can participate in a variety of different ways, with variable group sizes, at times that suit them. Many trail users are also drawn to trails to connect to nature and experience physical and mental health benefits.

*WA Trails Market Research Report (*2021) identifies the intrastate market – predominantly sourced from metropolitan Perth – as providing the greatest potential for trails-based visitation volume, especially for the near-to-Perth regions.

CYCLING – GENERAL

Data suggests that elevated 'recreational' bike riding during and after the COVID lockdown period has influenced a diversified trip purpose. Most of the bike count growth across 2020 was due to additional weekend bike riding. This suggests a greater interest in recreational bike riding among Perth residents and supports survey data indicating that by the end of 2020, a broader demographic spread of riders was using the (metro) bike path network.

AusPlay statistics for 2022 Year recorded cycling as the fifth most popular recreational activity with 15.2% of West Australians participating in some form of cycling.

More generally, *WA Trails Market Research Report* records that 26% of Western Australian's took a day trip that included a cycle experience. While the largest group of overnight visitors to WA who undertook cycling while on holiday is the intrastate (WA) market, interstate and international visitors stay for a longer time at the destination.

ADVENTURE CYCLING – DIFFERENTIATION IN A GROWTH MARKET

Although many reports focus on mountain biking as a focus discipline, there are growing markets that can be described as similar but distinct to mountain biking that also use trails and dirt roads for cycling recreation. They (along with mountain biking) are more broadly described under the label 'adventure cycling' defined as any style of cycling that travels off bitumen seeking an experience enjoyed in nature and on two wheels.

Most people participating in what is often called mountain biking but can in fact refer to any number of disciplines, do so for fun and enjoyment, with only a small proportion focused on competitions. A study of different adventure biking categories, quickly becomes a study of fragmentation. TRC Tourism recognises 17 categories with plenty of crossover between them.

The attractive points for adventure biking are that it enables people to choose who they ride with, generally family or close friends; it can be done anytime; it does not require a minimum level of competency (other than the ability to ride a bicycle) and allows people to choose trails to match their ability.

Regions looking to attract and facilitate the adventure biking community need to be mindful of the increasingly diverse nature of what 'adventure/mountain biking' actually is or is perceived to be by different markets. Curators of nature-based cycling also need to recognise that riders today demand a higher quality of experience and service across what is an increasingly fragmented market profile. The challenge for nature-based cycling regions is to target the biggest user base that best matches the style of riding best suited to the landscapes available.

Adventure cycling can be broken down into subset descriptors of mountain biking, bike packing/touring and gravel grinding. Each subset has different engagement profiles, if sometimes overlapping.

Mountain bikers use predominantly singletrack trails (although often use dirt and fire roads as connecting trails), seek more technical terrain with features that are increasingly designed and groomed for use (i.e. flow trails,

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jumps, berms). There are many different styles of mountain biking from cross country (XC) to all mountain, gravity, flow and downhill (DH), along with niche styles of trials, freeride, freestyle, 4X, and slalom. Rides are usually 2 hours to full day experiences. Many mountain bikers seek out extensive networks of trails and/or require a critical mass of trails to consider a destination for ride-specific travel. It is generally recognised that an international Mountain Bike Trail Hub of Signature status requires 80km of trail within a network and a supporting 'Trail Town' encompassing adequate long stay and activity facilitation.

Gravel grinding encompasses a fairly broad sweep of riding activity, but pertains mainly to long distance day rides – most often 100km+ – that seek out back country, dirt and fire track roads with little to no traffic. Gravel grinders will often seek high-end ascent profiles and likely compete with friends either in person or through online platforms (such as Strava). Gravel grind events – both competitive races and non-competitive challenges – are a rising phenomenon across the world, but particularly in North America and Australia where the countryside is vast and fairly unpopulated and landscapes attractive to ride through. Gravel grind bikes are versatile, adaptable and durable, with a focus on greater comfort for longer-form adventures and the types of rough, remote road routes and variable surfaces that comes with rural landscapes.

Bike packing / back country touring is the birthchild of mountain biking and backpacking. It delivers the adventurous freedom of multi-day backcountry hiking, combined with the range and added thrills of riding a mountain bike. It's about exploring remote places via singletrack trails, gravel, and abandoned dirt roads, carrying only essential gear.

While backcountry touring can be done on gravel grind bikes, it is more often undertaken on a mountain bike, which delivers better capacity for loading up with luggage while maintaining better stability – important when your load is heavy and you are rolling over rough ground. Because mountain bikes tend to move more slowly than road bikes, and carrying loads tend to be much more than on gravel grind adventures, daily distances tend to be shorter for backcountry rides, favouring roughly the 40-50km mark and often entailing lots of stopping en route to admire vistas, or stop at the country bakery. More determined riders can, however, surpass 100km in a day, depending on terrain, climbing profile of the route, luggage load, weather and sunlight hours.

Where gravel grinding is usually (but not always) a single day outing and orientated towards competitive or challenge-related goals, bike packing is all about slow travel exploration. It is based around multi-day, often multi-week and sometimes multi-month journeys where the focus is on exploration of places, landscapes, towns and tourist attractions: simply, it is having a grand adventure on two wheels while being mostly self-sufficient. 'Mostly' because while hardcore riders take pride in being an island unto themselves in terms of sufficiency, the profile of bike packing has softened somewhat with riders now often staying at B&Bs, hotels, motels and caravan parks and eating out at cafes and restaurants.

The cycle tourist is much more likely to undertake a range of other activities compared to non-cycle tourists, explaining why the cycle tourist's average spend is much higher than non-cycle tourists. Of interest is their tendency to eat at restaurants, go to licensed venues and go shopping; all activities which would benefit the economies of Wheatbelt and Peel regions.

MOUNTAIN BIKING

Mountain biking is recognised as one of the fastest growing recreational and tourism activities in the world. Some estimates on national mountain bike participation suggest that almost one million Australians engage in some form of mountain biking activity, ranging from beginner through to competition level.[17]

In terms of growth, mountain biking has a market opportunity to grow considerably. Mountain biking was the sixth most popular recreational activity across Australia that adults participated in more during the April to June 2020 COVID-19 lockdown. These activities, particularly those that can be done solo or physically distanced, were more immune to COVID-19 disruption.[18]

Data on actual participation in mountain biking in Australia is largely collated from four sources – Mountain Bike Australia's (MTBA) statistics; *Ausplay Cycling – State of Play Report* (2020); *Mountain Biking in Australia - An*

[17] *Warburton Mountain Bike Destination* 2019 – Instinct and Reason
[18] *Early impact of COVID-19 on sport and physical activity participation*, AusPlay, October 2020

Economic and Participation Analysis (AusCycling 2021); and recent research undertaken by Instinct and Reason on behalf of the Yarra Ranges Council for the Warburton MTB Trail Hub project in Victoria.

Determining exact levels of participation in mountain biking in Australia is difficult due to a lack of consistent data at a national level. The AusCycling report found the number is likely to align closer to the 2021 AusPlay survey, which found that approximately 492,900 Australians participate in mountain biking, an increase of nearly 22% on the previous year. The data found that participation is generally skewed towards males, and that participation is predominantly casual and non-organised. TRC notes the variation range between participation numbers quoted in available reports (from 492,900 up to approaching 1 million) is likely due to the lack of capturing entry and beginner level recreational rider activity. This cohort represents a large percentage of riders who own and use mountain bikes off road but do not necessarily identify as 'mountain bikers' and are therefore not captured in standard data capture gateways (club membership, event participation, wheel counts).

The WA Mountain Biking Strategy 2022-2032 reports that 53,116 people participated in mountain biking in WA across 2021. A WestCycle mountain biking community survey (2021) reported 62% of respondents were riding at least once a week, with 31% of these participants riding 2-3 times per week.

Trail counter data from trails in various regions across WA supports increased state-wide level of interest and participation in mountain biking.

The Wambenger Trails near Collie recorded 6,059 rides in their first full month after opening, and the Murray Valley Trails (Dwellingup) were ridden a total of 111,353 times in 2021, their first full year of operation after opening. The Kalamunda Trails – one of the closest mountain bike trail networks to metropolitan Perth – were ridden a total of 139,633 times in 2021.[19]

Figure 1. Demographics of Basic, Intermediate and Competition riders[20]

BASIC RIDERS	INTERMEDIATE RIDERS	ADVANCED OR COMPETITION RIDERS
• MTB is an add-on holiday experience, learning a new skill and undertaking a different experience • Predominately female • Over 55 years of age • Minimal MTB experience • May undertake as a holiday activity • MTB will be part of a day trip • Participating in MTB for health and fitness and being outside in the open air.	• MTB is part of a holiday in a natural setting • Undertaken with family or partner • 6-10 years riding experience • May undertake as a twice per year holiday activity • MTB will be part of a day trip • Participating in MTB for health and fitness and being outside in the open air.	• MTB is a core element of the holiday • Thrill-seeking and adventure based • Will undertake with family or friends • Predominately male • 11+ years MTB experience • Income $150K+ pa • May undertake 3 times or more per year as a holiday activity • MTB will be usually part of a 2-night trip • Participating in MTB to challenge themselves, enjoy time outside in the open air, health and fitness, thrill seeking and adventure, recreation and social connection.

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[19] *WA Mountain Bike Strategy* 2022

[20] *Warburton Mountain Bike Destination 2019* – Instinct and Reason

E-BIKES

Electric and power assisted bikes (e-bikes) represent one of the fastest growing segments of the bike industry, as they allow riders to extend their cycling distances. E-bikes help in overcoming hilly terrain or lack of fitness, can assist in rehabilitation after injury or illness, and are a cost-effective and green transport solution. They also improve trail accessibility for older riders who can access areas and ride trails that they would not normally be able to.

Australian e-bike sales have just recorded their fourth consecutive year of rapid growth. For the 2019–20 financial year sales were 48,000 units, up almost 50% from 32,500 units sold in 2018–19. Using a $3,000 average retail sale price estimate would mean $216 million in annual retail sales this current 2020–21 financial year for a product category that virtually didn't exist in Australia five years ago and is only set for further development and growth.[21] In WA, 15% of WA mountain bikers use an e-MTB[22].

BUSHWALKING

Bushwalking is currently rated in sixth position of the top 20 sports and physical activities undertaken by Australians. 1.3 million Australian adults (6.4% of the adult population) and 21,000 children participate in bushwalking activities annually, with 18% of participants undertaking bushwalking activities at least once per week.

Peak participation age for men is 55–64 years and for women is 25–34 years.

50% of Australian bushwalking participants walk for 3 hours or more on average.

Top reasons to participate in bushwalking are to be outdoors and enjoy nature, for fun and enjoyment and for physical health and fitness.

Recreational walking is currently rated in first place of the top 20 sports and physical activities undertaken by Australians.

Figure 2: What bushwalkers are seeking[23]

Iconic Walks
An iconic walk is a personal adventure, an achievable challenge that creates an overwhelming feeling of reward.

When people search the world for iconic walks, they consider one or more of these **common characteristics:**
- diverse landscapes, often mountainous, coastal, pristine, beautiful, dramatic
- contact with locals, and local history and culture, including built
- animal encounters
- uncrowded
- length varying from tens to hundreds of kilometres, including optional side trips and sections.

For **backcountry longer walks,** people value:
- landscape variety
- solitude
- pristine environment
- adventure
- effort versus reward
- escape
- own pace (for some).

Popular **shorter walks** often include:
- landscape variety
- history
- effort versus reward
- uncrowded track
- comfort somewhere (during and/or at the end).

SOURCE: PWS, 2018 as cited in Tasmania's Next Iconic Walk Feasibility Study: Final Report. 23 July 2021 (Version 14) (SGS Economics and Planning)

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[21] Latz Report , May 2020

[22] WestCycle Mountain Bike Community Survey 2021

[23] PWS, 2018 as cited in Tasmania's Next Iconic Walk Feasibility Study: Final Report. 23 July 2021

Walking and running are two of the top five physical activities undertaken by Western Australians.[24]

AusPlay statistics for 2022 recorded (general) walking as the top recreational activity with 40.1% of West Australians participating. Bushwalking specifically was sixth most popular, recording 7% or 154,900 West Australians regularly engaging (this is an increase from 2020 figures of 4.8% or 107,000).

A brief analysis of Google Analytics data sourced from Trail WA's website for the period 2019-2021 revealed that the majority of users are from Perth and are aged 25-54 years. The majority of website users are based in Australia, of which almost 84% are from the Perth region.[25]

Bushwalkers seek experiences in natural environments and access to diverse landscapes. Participants assess elevation, distance, aesthetics, and technical aspects of a trail to decide if it is the experience they desire. While some are motivated by the opportunity to walk or run with family or friends, others are motivated to participate in solitude. There is a segment of the population looking for more varied places to walk the dog and others seeking a personal challenge through multi-day, unassisted expeditions.

TRC Tourism research into the national multiday (overnight) walking market showed approximately 3.3 million Australians have been on an overnight walk in the past five years or have one planned in the next year. Compared with the average Australian, overnight walkers are younger. 57% of walkers are aged between 18-39, compared with 25% of the sample. Participation in walking falls away at around age 40. 45% of walkers have children under 18, compared with 14% of non-walkers. The study also found that 26% of overnight walkers sought full accommodation and meals on a trip with 43% seeking some form of shelter (serviced and non-serviced). 31% were tented hikers. The survey showed that retirees preferred fully-serviced walks while young-mid aged singles and couples with and without children preferred tented accommodation. Older couples and families preferred some form of shelter during their overnight hike.

The most common location for bushwalking is the Perth Metropolitan Region, followed by the South West, Peel and Great Southern Regions.

This correlates with data from the Bibbulmun Track Foundation which showed that campsites that are closest to Perth (e.g. Hewetts Hill and Monadnocks) receive the highest numbers of walkers, the majority of whom are Perth resident day walkers or overnight walkers (1-2 nights in total). More remote huts such as Long Point and Schafter Huts attract lower numbers of Perth residents (54% and 57% respectively).[26]

Djurandi Dreaming Point Peron
Cultural Tour, Rockingham IMAGE: Tourism WA

[24] AusPlay survey results. Australian Sports Commission. Retrieved from www.clearinghouseforsport.gov.au
[25] *WA Trails Market Research*, 2021.
[26] *WA Trails Market Research*, 2021

TRAIL RUNNING

With an estimated 20 million participants since 2010, trail running has been one of the world's fastest growing sports, according to the International Track and Field Federation.[27] Since the mid-1990s, the popularity of trail running has grown at a rate of 15% each year.[28] Indicative measures record the growth of trail running events as increasing 1,000% in the last decade[29].

In 2003 Ultra Running magazine reports that 18,000 people in North America completed an ultramarathon. In 2017 that figure had risen to 105,000, the majority on trail.

The economic spin-offs generated by trail running events can be quantified in millions of dollars – more than US$8.5 million was generated from the 2017 Ultra Trail du Mont Blanc (UTMB)[30], considered the global pinnacle of ultra-trail running events. Chamonix Tourist Office reports that UTMB it is now one of the busiest two weeks of the year.

In Australia, the Ultra Trail Australia event started in Katoomba, Blue Mountains New South Wales in 2008, with 177 entries in a single distance (100km). The running festival now hosts a sell-out (capacity) 6,000 across five distances. It is estimated by race organisers that 8,000-9,000 spectators/supporters also attend. The Blue Mountains City Council's Event Strategic Plan identified the Ultra Trail event as a high yield event contributing an estimated $12.5M in 2018 to the local economy and supporting local employment and associated businesses.[31]

As an indicative measure, the largest trail running event in Australia (Ultra Trail Australia) is seven times as big as the largest mountain biking event (Otway Odyssey, 1000 participants); there are four time as many trail running events (450-500) as mountain biking events in Australia and the average trail running event attracts 2-4 times participation (600-800) as the average sized mountain biking event (200-300).

Trail running near Bells Rapids, Avon National Park
IMAGE: TRC Tourism

[27] https://theconversation.com/the-trail-running-community-faces-its-biggest-challenges-yet-156260
[28] https://www.worldathletics.org/disciplines/trail-running/trail-running
[29] https://www.theguardian.com/lifeandstyle/2018/apr/02/ultrarunner-ultramarathon-racing-100-miles
[30] https://www.lyoncapitale.fr/actualite/coronavirus-et-trail-quel-impact-sur-l-utmb/
[31] https://www.bmcc.nsw.gov.au/sites/default/files/docs/LPP_Report_2_Violet_Street_KATOOMBA_NSW_2780_X_687_2020.pdf

TRAVEL MARKET ENGAGEMENT BEHAVIOUR

Health & Wellbeing visitors are generally those undertaking a trail experience for the purposes of health, wellbeing and training (for a particular health, fitness or sport outcome). While they will travel longer distances for training purposes on weekends, in general this is a market taking 1-3 hours of any weekday or weekend for the specific purpose of training (can be skills based or fitness based, physical or mental motivators). As a guide, these visitors tend to travel up to an hour maximum for this experience, mostly between 15-45 minutes as a threshold. Health & Wellbeing visitors naturally transform to Day and Overnight visitors for extended engagement experiences relevant to their preferred recreation.

Day visitors are those who travel for a round trip distance of at least 50 kilometres, are away from home for at least four hours and do not spend a night away from home. Same day travel as part of overnight travel is excluded, as is routine travel, such as commuting between work/school and home.

In contrast to *AusPlay* reports, the National Visitor Survey shows that for the period 2018-2020 an average of 36.2 million people undertook a bushwalk while on a day trip. Over one-third of these trips occurred in New South Wales, and 10% occurred in Western Australia.

Although WA had a smaller number of total day trips compared to NSW, Victoria and Queensland, it has the highest number of day trippers who undertake a bushwalk. This is also higher than the national average, which grew from 5.7% in 2018 to 6.3% in 2020. This suggests that there is already an appetite amongst WA day trippers to undertake a bushwalk[32].

Overnight visitors travel further to target destinations, usually 100km+, an adequate distance required to justify overnight time and monetary expenditure. This market tends to spend more in region, but frequent less often. They have higher thresholds of expectation in terms of amount, variety and quality of trails, points of interest, off trail facilitation (accommodation, hospitality) and added value activities and attractions.

7.3   The Tourism Economy

In the year ending March 2020, the Perth region welcomed 5.6 million visitors, which had been steadily growing over the preceding years. COVID has had a significant impact on visitation with just under 3 million visitors arriving in 2021.[33]

Visitation to the Perth region has traditionally been dominated by the intrastate market, with 56% of visitors being from within the state, although they command only 31% of the spend.

International visitors have been highly lucrative for the region, with 17% of the visitors attracting 28% of the spend. The interstate market is less lucrative than international, with 27% of the visitors generating 22% of the spend.

Tourism in Perth metro and its surrounding regions generates more economic activity than tourism in the rest of Western Australia's regions put together, with a Tourism Gross Value Added (GVA) of $1.6b, compared with regional WA at $1.5b.[34] The industry employs around 24,800 people, 4.8% of the region's employment, and has around 24,000 tourism businesses.

At only 2.7% of the region's total GVA,[35] tourism is smaller than other industries in the state (such as mining and agriculture), however it contributes to the liveability and community connectedness of places, and has a low barrier to entry to encourage employment at all levels.

There are currently around 24,000 tourism businesses[36], around 16,750 hotel rooms, and around 3,500 Airbnb listings in the Perth and surrounding region, with a heavy leaning to the 4½ star accommodation style.

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32 *WA Trails Market Research*, 2021
33 Tourism WA, Sourced from Tourism Research Australia, IVS & NVS 2022.
34 Tourism Research Australia, Regional Tourism Satellite Accounts 2020-21
35 Tourism WA RTO Research Insights 2021
36 https://www.tra.gov.au/tourism-businesses-in-australia-june-2016-to-2021

7.4   The Trail Economy

CYCLING (including mountain biking)

Demand for cycling products and experiences has grown at an unprecedented rate, with the global cycling market set to increase from $130b to $200b in 2027. As a key market segment, mountain bikes are expected to drive a significant portion of this growth, reflecting the strong demand for mountain biking activities.[37]

The 2021 AusCycling report found that mountain biking participants spend between $136.9 and $630.8 million annually in Australia simply riding on local trails[38]. This expenditure provides significant support to retail, accommodation and food, professional, scientific and technical services industries.

In addition to this local expenditure, mountain bikers also contribute significantly to the Australian tourism industry and broader visitor economy through regular travel to mountain biking destinations. Approximately 40% of riders went on a bike-specific *interstate* holiday in the past 12 months, averaging a spend of $2,485.75 per trip and travelling 1-2 times per year. Approximately 65% of riders went on 1-3 *intrastate* holidays in the past 12 months with an average spend of $1,707.95 per trip.

Mountain Biking in Australia: An Economic and Participation Analysis estimates average total expenditure per rider per year for Australian mountain bikers of $2,882. This is spent across transport to and from trails, meals and beverages, purchased from retailers and bike rental. This figure does not include larger expenses such as bike purchases, equipment, clothing and servicing – expenditure that would occur closer to a rider's home location, rather than at the destination.

The report states that on average, people who mountain bike spend $27.10 per ride, with transport to and from the trails being the largest expenditure item at $12.35 per ride, followed by purchases from supermarkets and other retail shops at $7.40 and other meals and beverages at $6.25 per ride.

Because of the nature of these purchases, with the possible exception of transport costs, this expenditure would likely occur within the proximity of mountain bike trails, with purchases made before or after a ride.

In addition to general expenditure, it was identified that approximately two-thirds of mountain bikers went on a mountain bike specific intrastate holiday in the past 12 months. MTBA members were more likely than non-MTBA members to go on a holiday intrastate revolving around mountain biking. Based on the survey results, people who went on intrastate holidays to mountain bike went between one and three times a year, with MTBA members more likely to go on intrastate holidays to mountain bike more than four times per year[39].

Western Australian mountain bikers reported that they would ride more regularly if they had closer access to trails and that they would be prepared to contribute $5-$10 per ride towards the cost of maintaining and managing trails[40].

HIKING & TRAIL RUNNING

There is very little published data on the direct spend of hiking and trail running tourists.

The 2014 Bibbulmun Track User Survey found that the average daily direct expenditure per person of all respondents using the Bibbulmun Track was $38.71[41].

However, when categorised by overnight and day-walk respondents, it is apparent that respondents on overnight walks ($45.09) spent considerably more per person per day than those on day trips ($30.95). This was mainly because of the requirement to pay for accommodation as well as a comparatively higher expenditure on equipment and food.

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[37] *Bicycle Market Size, Share and COVID-19 Impact Analysis 2020-2027,* Fortune Business Insights, 2020.
[38] The discrepancy in these two figures results from the difficulty in estimating the total number of riders in Australia. The figure is agreed to be likely somewhere in the middle.
39 *AusCycling's Mountain Biking in Australia: An Economic and Participation Analysis*
[40] *WA Mountain Bike Strategy* 2022-2027
41 *WA Trails Market Research* 2021

Using spend data and average annual number of overnight walks and day walks, the report's authors of the original report (Bibbulmun Track Foundation) were able to quantify the estimated total average annual direct expenditure by Bibbulmun Track walkers as $13.1 million.

There also exists very little economic data on trail running recreation as a market, with the exception of a recent survey[42] of trail running event operators yielding some relevant data, with considerations that in general a high percentage of trail runners enter more than one trail running event per year. This means that the trail running events sector is a good indicative measure of the trail running sector more broadly.

Across the 2020-21 season there were: 119 event producers including commercial, club, and not for profit-based entities hosting an average of 331 trail running events, accounting for 1,160 individual distance runs based on a survey of all AU event calendars.

A significant number of trail run event operators (40%) produced 5 or more events per year, with an *average* registration count of 465 per event, this accounts for an approximate 154,113 trail run event entries per year across Australia (noting that this captures likely entries to multiple events by a single participant).

With an average entry fee (averaged across all price points ranging from $20 through $2189 (multi-day) and all distances from 5km through 200 miles) of $186.50 per entry, this accounts for a spend of $28,742,075 million per year on trail running entry fees alone.

Based on a number of economic analyses provided by some event producers using post event survey data, events of economic significance (300+ participants) account for anywhere between $130,000 (300-400 participants, single day events) to $4M+ (1000+ participants, multiple day events) in local and regional economic stimulus per event, accounting for direct regional expenditure on accommodation, food and catering, fuel, and services.

There are approximately 35 trail running events across WA of which 12 are located within the study region.

Outside of region, but indicative of potential value of trail running events to regions, the Margaret River Ultra organised by Rapid Ascent, hosts more than 1,500 trail runners, with organisers reporting 15,169 bed nights generated and a direct economic impact of $6.3 million.

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42 Trail Running: The Economic Value of Australia's Trail Running Evets Sector 2022

8. Trail Visitor Characteristics

It is important when assessing potential trail projects to have a clear understanding of the trail user market your trails will likely appeal to and be suitable for. This helps guide development prioritisation, ensuring the right trails are created for the right reasons in the right place at the right time.

Western Australian Trails Market Research Report (2021) identifies two types of trail visitor markets:

- **Destination Trail Users:** experienced trails users who regularly travel with trails as a primary motivator. They have likely visited other Australian or international trails destinations. They seek high quality trails with good supporting infrastructure in scenic/natural locations.
- **Trail Users While on Holiday:** typically, less experienced trail users whose primary motivator for travel is not trails. While they view trail use as a secondary motivation for their visit, they will participate in trail activities and will likely hire or require equipment. They may place less emphasis on the trail and more on accessibility of the facility, the setting and nearby attractions and amenities.

An additional market for this study is:

- **Local Trail Users (Recreational):** typically, residents living within a 50km radius of a trailhead. They use trails for fitness, recreation and leisure, particularly on weekends or during holiday periods. Accessibility and setting are important. Those travelling a longer distance <100km may place more emphasis on nearby attractions and amenities and are more likely to be weekend visitors.

The Research Report also identifies four main groups of trail users according to motivations and skills and experience:

- **Leisure:** typically, holiday makers who seek out accessible trails for use with family and friends. Time spent on trails is often short to half-day in duration.
- **Active Lifestyle:** outdoor enthusiasts who will plan their visit to include use of trails. Time spent on trails is often half to full day or overnight stay.
- **Adrenaline Seekers:** competitive and/or highly skilful trail users, who participate in trail activity regularly, often multiple times a week. They seek challenges, whether this be through organised competitions, seeking out less accessible trails or more technical/challenging trails.
- **Independent Adventurers:** dedicated trail users who will seek out challenging trails or unique and extended experiences. Time spent on trails is often overnight and multi-day.
- Broadly, the Leisure Market tends to fall within the 'Trail Users While on Holiday' and 'Local Trail User' markets, while Active, Adrenaline and Independent trail visitors tend to fall within the 'Destination Trail User' and 'Local Trail User' markets. There is some overlap between segments, however.
-

MOUNTAIN BIKING

WA Mountain Bike Strategy 2022-2027 further delineate the mountain bike market segments as:

- **Leisure** – general cyclists of all ages and abilities, recognised as the largest market. Ride infrequently, have limited skills, require accessible trails.
- **Enthusiast** – purely recreational riders with moderate skills, variable fitness and ride weekly.
- **Sport** – competitive riders, ride regular routes multiple times a week and are members of MTB club. Small but influential market.
- **Independent** – skilled outdoor enthusiasts who ride once a week or more and are technically proficient. Also a smaller market. Undertake activities independently/self-planned and facilitated.
- **Gravity** – skilled technical riders seeking very challenging trails, ride once a week, often club members. Small market requiring purpose-built trails, often with uplift facility.

HIKING

Surveys show hiking activities have wide demographic appeal: bushwalkers range from children accompanied by parents through to retired seniors. Equally, trail runners are spread across a wide range of age groups as entry barriers (skill, equipment, access) are extremely low.

A diverse range of available experiences allows participants to select an experience according to their capability and how much time they have, resulting in an activity that can be enjoyed at any stage of life[43].

Bushwalkers and trail runners seek experiences in natural environments and access to diverse landscapes. Participants assess elevation, distance, aesthetics, and technical aspects of a trail to decide if it is the experience they desire. While some are motivated by the opportunity to walk or run with family or friends, others are motivated to participate in solitude. In some instances, the activity is a by-product of a different recreation focus such as birdwatching, wildflowers, geographic, cultural or heritage interests.

The *WA Hiking Strategy 2020-2030* identifies three categories across the participation spectrum:

- **Outdoor Aware** – virtual or visual, incidental, outdoor play
- **Outdoor Active** – managed outdoor recreation, adventure recreation, outdoor immersion
- **Outdoor Adventure** – wilderness experience, extreme adventure.

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[43] *WA Hiking Strategy: Bushwalking & Trail Running in WA* 2020-2030

9. Trail Destinations

9.1 What is a trail destination?

Most locations host trails and pathways of some form, however not all trails and trail networks qualify specifically as a 'trail destination', that being a place that offers an appropriate amount and desired type of trails attractive to an inbound visitor travelling for the purposes of nature-based recreation.

Key tenants of a 'trail destination'

- Concentration of trails and trail type (matched to target visitor preferences)
- Quality of trails and experience
- Diversity of trails
- Differentiation (unique selling points)
- Suitability and sustainability of trails (environmental, cultural, community)
- Inclusive and accessible trails
- First Nations partnerships in place
- Viable governance, management and business models in place
- Support and facilitation capacity (accommodation and servicing)
- Community support
- Communication capacity – availability of pre-trip information and marketing
- Commercial opportunities
- Events capacity

Trails are classified in an overarching trails hierarchy.

Figure 3: Classification of trails hierarchy.
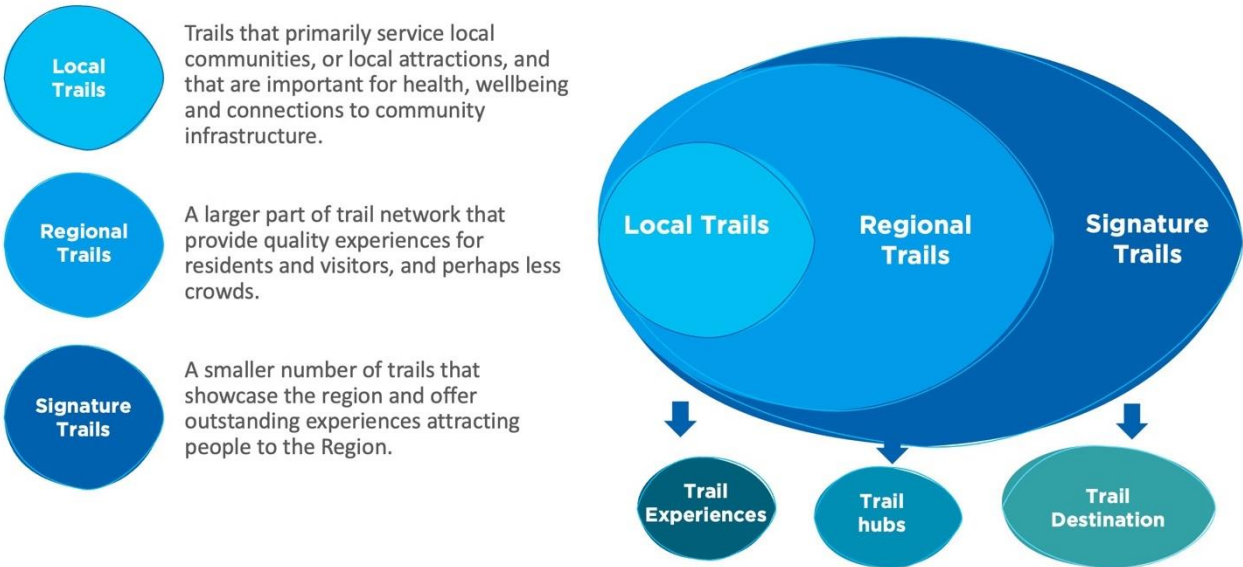
This structure allows for appropriate development decision making regarding the appropriate type of trails required and levels of infrastructure investment.

9.2 Mountain Biking Trail Classifications

Any mountain biking trail destination should meet minimum trail classification standards applied to mountain biking trails. *Western Australia Mountain Bike Management Guidelines* defines the significance hierarchy of mountain biking trail destinations as:

Table 1.   Mountain Biking Trail Classifications

National Significance

- For a large population /visitation centre
- Offers one week+ riding opportunities
- >80km trails
- 4+ loops
- >50% singletrack
- <180km from airport major transport link
- <20km access from major highway
- >90km from another national scale centre
- Mix of trail classifications including all classifications
- Minimum high-quality facilities and support services available
- NB: respected trail builders, World Trail, recommends that any mountain biking hub of international or interstate significance should be located within 2hrs from a major gateway airport.

Regional Significance

- For small population centre or large community / tourism resource
- Caters for short breaks or weekend trips
- 20-80km trail
- 2+ loops
- >50% singletrack
- <40km from population of >15,000 +
- <10km access from major highways and primary roads
- >45km from another national or regional scale centre
- Mix of trail classifications, minimum green/blue
- Infrastructure – accommodation, car park, toilets, trailhead signage, trail markers.

Local Significance

- For small community and/or cater day trips
- Up to 20km
- 2+ loops
- >80% singletrack
- Clear public road access
- All trail classifications
- Minimal infrastructure – car park, toilets, trailhead signage, trail markers

Western Australia employs a Trail Classification System that provides a standard five level, colour coded system to indicate the degree of difficulty of mountain bike trails. The classification enables visitors to understand the nature of the trail before beginning their ride and allows them plan their ride for enjoyment, appropriate level of challenge and safety.

This matrix incorporates both IMBA's Trail Difficulty Rating System and Dafydd Davis' mountain bike Trail Classification and Grading System. This matrix gives detailed specifications for trail tread, turns and technical features.

Figure 4: Mountain Bike Trail Short Classification Descriptors [44]

easy	This symbol indicates a typically flowing, open trail on firm terrain with gentle gradients. Surface may be uneven, loose or muddy at times. Riders may encounter small rollable obstacles and technical trail features. Recommended for beginner riders.
moderate	This symbol indicates a typically narrow trail with loose, soft, rocky or slippery sections and hills with short steep sections. Riders will encounter obstacles and technical trail features. Recommended for intermediate riders with some technical mountain biking experience.
difficult	This symbol indicates a trail with variable surfaces and/or steep gradients. Riders will encounter large obstacles and technical trail features. Recommended for experienced riders with good technical skills.
extreme	This symbol indicates the trail may contain highly variable surfaces, very challenging terrain and/or very steep sections. Riders will encounter committing and unavoidable obstacles and technical trail features that may not be rollable. Recommended for very experienced riders with high level technical skills.

WA Mountain Bike Management Guidelines

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[44] *Western Australia Mountain Bike Management Guidelines*

9.3   Hiking Trail Classifications

AUSTRALIAN WALKING TRACK GRADING SYSTEM

Western Australian trails refer to the Australian Walking Track Classification System (based on AS 2156.1-2001). Under the system, walking trails are graded on a difficulty scale from grades one to five, categorising the relative technical difficulty of recreation walking trails. These systems are used to:

- assist trail users to make informed decisions
- encourage visitors to use trails that match their skill level
- manage risk and minimise injuries
- improve the outdoor experience for a wide variety of visitors
- aid in the planning of trails and trail networks.

Figure 5: Australian Walking Track Grading System

	Grade 1: No bushwalking experience required. Flat even surface with no steps or steep sections. Suitable for assisted wheelchair users.
	Grade 2: No bushwalking experience required. A hardened or compacted surface which may have gentle hill sections or occasional steps. Walks up to 10km.
	Grade 3: Suitable for most ages and fitness levels. Tracks may have short steep sections, a rough surface and many steps. Walks up to 20km.
	Grade 4: Bushwalking experience recommended. Tracks may be long, rough and very steep. Directional signage may be limited.
	Grade 5: Very experienced bushwalkers with specialised skills, including navigation and emergency first aid. Tracks likely to be very rough, very steep and unmarked.

Any walking trail destination should have its trails assessed, classified and grades advertised via pre-trip and in situ information.

There is no official alternative designation for trail running trails. At present, trail runners refer to and make destination and intended activity decisions based on the available Australian Walking Track Grading System where available.

There is also no official quantitative framework (as per mountain biking) that categorises walking trails and networks into the specific hierarchical National/Signature, Regional and Local designations.

9.4   Trails WA Trail Towns

'Trail Town' is an accreditation assessed by Trails WA. It denotes a population centre or popular recreation destination that offers a wide range of high-quality trails as well as related services, facilities, businesses, strong branding and supportive governance of a standard to attract international visitation.

A Trail Town incorporates trail centres and typically has multiple trail networks. A Trail Town may also consist of a number of sites, hosting several signed and mapped trails of varying type and classifications. Current recognition covers destinations with a focus on Mountain biking or Hiking. In addition to the town's main accredited activity, other complementary activities can include, for example, equine and paddle trails.
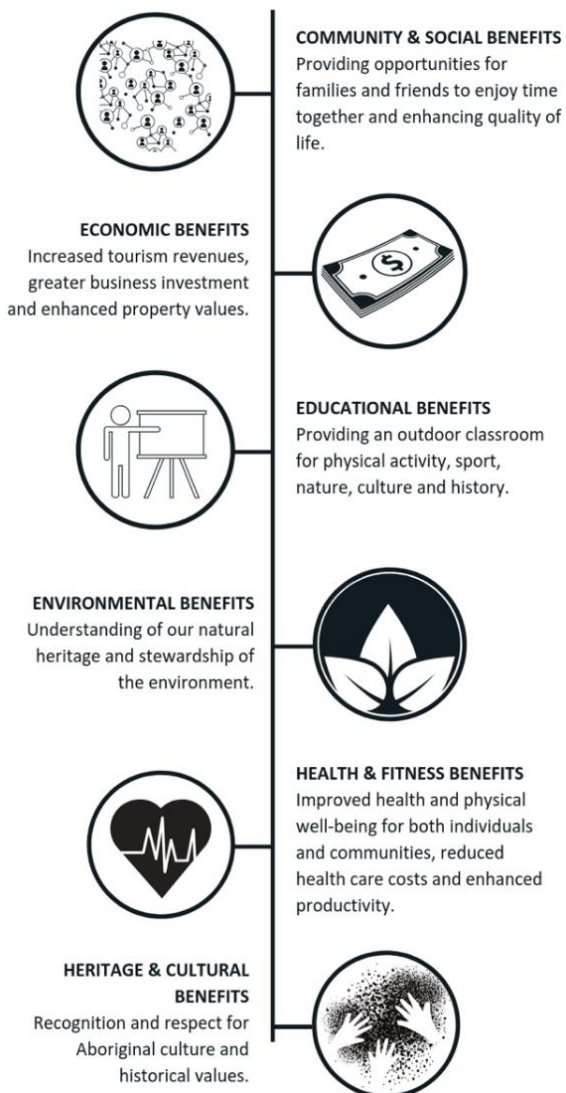
A Trail Town must have a minimum of three days' of trail activity of exemplary standard.

Mountain Bike (MTB) Trail Towns must host a minimum of 80km of sanctioned, signed, high quality and purpose built single track MTB trail.

Hiking Trail Towns must host a minimum of 45km of sanctioned, signed and high-quality purpose built hiking trail.

9.5   Benefits & Characteristics of Quality Trails

BENEFITS OF GREAT TRAIL EXPERIENCES

COMMUNITY & SOCIAL BENEFITS Providing opportunities for families and friends to enjoy time together and enhancing quality of life.

ECONOMIC BENEFITS Increased tourism revenues, greater business investment and enhanced property values.

EDUCATIONAL BENEFITS Providing an outdoor classroom for physical activity, sport, nature, culture and history.

ENVIRONMENTAL BENEFITS Understanding of our natural heritage and stewardship of the environment.

HEALTH & FITNESS BENEFITS Improved health and physical well-being for both individuals and communities, reduced health care costs and enhanced productivity.

HERITAGE & CULTURAL BENEFITS Recognition and respect for Aboriginal culture and historical values.

CHARACTERISTICS OF GREAT TRAIL EXPERIENCES

Clear point of difference for the trail experience that is well communicated through marketing

Existing high market profile for the destination in which they are located

Complementary nature-based attractions, products and infrastructure in the region

Ability to cater to both independent and guided walkers / riders

An experience that offers a level of exclusivity and avoids high volume nodes or trails

A quality, seamless experience with ease of information, booking and accommodation

Walk/cycle distance that is geared to consumer preferences

10. Regional Analysis

The study region is supported by two Regional Development Commissions (Wheatbelt and Peel) whose objectives are to develop and enhance the economic development of their respective areas.

The study region encompasses trail landscapes located between 45 minutes and 3 hours of metropolitan Perth. There exists a diversity of landscapes and topographical offerings across both regions attractive to hikers, trail runners and mountain bikers. However, large parts of the Wheatbelt region in particular do not offer high value trail-centric landscapes and tourism offerings at a regional or state classification level. This report will focus on trail destinations of a regional plus classification that offer high quality trail-based recreation with limited reference to local trails positioned within proximity deemed to offer added value and dispersal propositions linked to primary regional trail offerings.

Regional Strengths

Diversity and proximity – Wide diversity of experiences across the regions, representing much of the best of Western Australia within close proximity (1-3 hours) of the city and suburban population centres.

Access – Roadways and vehicular access is generally good.

Rural character – Safe, secure with low population and genuine rural characteristics, Perth's outer-regions provide an abundance of experiences located within 30--minute to 3-hour radius.

Natural assets - Naturally beautiful regions, national parks, landscapes and topographical points of interest with a favourable climate for most of the year, with exceptions of high temperature summer days.

Investment – Ongoing investment in trail projects that support the trail visitor economy, led by the likes of Dwellingup and Bindoon.

Immersion – the 'remote wilderness feel' of trails in the Perth region is a strength in terms of immersion and building unique, adventurous experiences that require some commitment, encouraging extended length of stay.

History & Culture - townships exhibit strong historical and cultural heritage and associated stories that can be hosted on trails both township and nature based.

Events – a strong calendar of trail based events.

Regional Weaknesses

Collaboration – collaborative planning, development and marketing by regions and LGAs lacking, creating significant development and marketing challenges.

Connectivity – lack of connection between major regional trail attractions. Regional public transport, cycleways and walkways between attractions not connected in a way that facilitates visitors. Marketing and visitor information not always unified in (regional) brand voice, legibility or collaboration. Major gaps in Traditional Owner storytelling and Connection to Country embedded in trails.

Brand clarity – Inconsistent regional and trail-focused branding and marketing that capitalises on existing trail experience strengths and focuses messaging for clarity.

Remoteness – Distance between activity nodes and notable lack of 'infill' trail attractions between nodes to encourage directive dispersal.

Lack of trail attraction / suitable geography – in some outer regions, specifically a majority of Wheatbelt.

Accommodation – Lack of visitor accommodation (quantity, quality and variety).

Workforce – lack of available tourism workforce and challenges of accommodating staff in situ.

Approval processes – Complex, uncoordinated approval processes across land managers at different levels of permit process.

Strategic direction – divergent development and investment priorities of neighbouring LGAs.

Regional Threats

Coordination – lack of coordination between LGAs and regions stifling cross-border trail development.

Workforce and skills shortages – a lack of low cost accommodation, visa issues, skills shortages and a permanent migration out of region and industry has left major and systemic workforce issues in tourism and hospitality across the country.

Intentional tourism planning – with other major industries competing for resources, it is difficult to establish trail tourism as a priority at local and state government level to produce coordinated and seamless visitor experiences.

Community sentiment – The community not valuing trail tourism or the opportunities it brings to the area, potentially not supporting trail development and approval processes.

Brand – Brand damage through lack of visitor experience management across whole-of-visit period (i.e. service and accommodation as well as on trail experience quality).

Investment – Lack of coordinated, complimentary and connected investment in critical infrastructure that supports trail tourism growth.

Inappropriate development – trail projects that do not meet market expectations, match landscape values, or are informal and not benchmarked to State planning guidelines.

Regional Opportunities

Focus on variety – developing destinations according to local strengths in landscape, capacity and unique offerings.

Building access – from target source markets and between trail destinations.

Destination connectivity – encouraging movement to and between surrounding regions with extensive experience opportunities through complementary (not competing) trail networks. Leverage of long-distance trails between nodes. Leveraging of Active Transport development.

Indigenous connection Further development of indigenous walking tour and other tourism experiences; use nature and trails as a key experience theme to connect experiences.

Mobilising growth and new activity markets - Capitalise on ongoing growth in higher value outdoor active markets and new emerging activity niches.

Event calendar – develop a vibrant year-round event calendar that encapsulates and engages focused on both trail-based and non-trail events (added value attractors for trail visitors). Creates target focus for initial visitor attraction and dispersal.

Brand – If communicated and rolled out well with operators, trade and the market, regional trail-based brands can re-engage markets and help clarify trail offerings and attractions to the market, while facilitating 'itinerary inspiration' in an authentic and tangible way.

Facilitation – growing nature based and adventure tour operators and related facilitation. There is significant opportunity to build the regions as adventurous and naturally relaxed, but with all the benefits of city lifestyle café and accommodation comfort.

Local food and drink – There is a major opportunity to hero culinary offerings and local produce as part of a regional trail experience.

10.1   Wheatbelt Region

OVERVIEW

The Wheatbelt region spans 154,862 square kilometres and has a diverse landscape from white beaches to hills and streams, located across 43 Local Government Areas, allocated into four regional clusters: Central Coast, Central Midlands, Central East, Avon and Wheatbelt South.

Agriculture is the main producer providing good local tourism product of olives, vegetable, wine grapes, honey and citrus fruits to name a few. There is an excellent tourism drive along the Wheatbelt Way which provides visitors with a free app to download that educates them on the region.

Trail-based regions of interest to this study include:

- Central Coast
- Avon and
- Wheatbelt South

Primary LGAs of significant trail-based interest for review include:

- Shire of Chittering
- Shire of Toodyay
- Shire of Northam
- Shire of York
- Shire of Beverley
- Shire of Pingelly
- Shire of Narrogin
- Shire of Cuballing
- Shire of Wandering

Adjacent LGAs that do not have significant destination trail-based attractions that may maintain a supporting role as dispersal activators of a trail-based travel itinerary include:

- Shire of Gingin
- Shire of Williams
- Shire of West Arthur
- Shire of Brookton

Map 6: Wheatbelt Regional Map
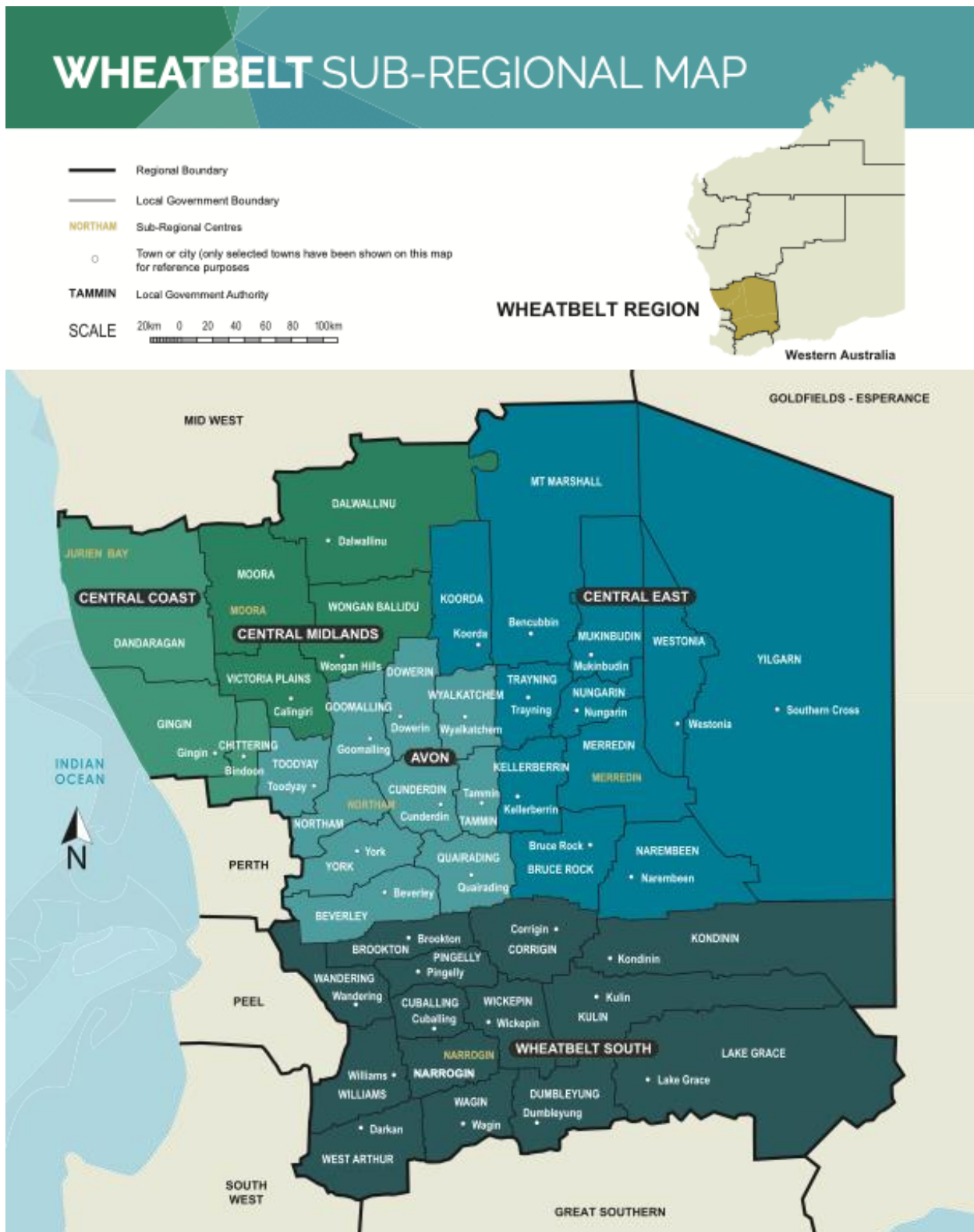
Yanchep NP
(NB: out of scope, project relevant trail hub)

Existing Trail Offering	Yanchep National Park offers the only current major walking trail infrastructure of Regional status to the north of Perth. It offers walk trails ranging from family friendly trails of 500m to challenging hikes up to 52km. Main walk trails include: • Ghost House Walk • Yaberoo Budjara Heritage Trail (Shared Use) • Coastal Plain Walk Trail • Wetlands Walk • Yanchep Rose Trail • Caves Walk Trail • Woodlands Walk Trail • Cockatoo Walk Trail The only trail of (limited) significance to the mountain biking market is the Yaberoo Budjara Heritage Trail.
Planned / Potential Trail Developments	NA
Guiding Strategies in Place	NA - mostly under DPAW management.
Concentric Analysis	• Walking focus (Local-Regional) • Northern suburbs source market focus • Potential trail connection / extension south and east for connectivity • Close proximity to Northern Perth Metro Yanchep offers a Local-Regional walking destination courtesy of the number and overall length of its trail network including connection to several long-distance trails. Only one major trail is suitable for mountain biking (local significance only). It does not feature the experience quality of other walk destinations within Perth Metropolitan (John Forrest, Bells Rapids area etc), however does stand as an alternative walks destination for the northern metropolitan region, and offers (a degree of) connectivity between Joondalup and Yanchep. Active Transport planning may develop connecting pathways to further activate Yanchep trails. Development opportunities are limited due to National Park status. The Shire of Gingin is to the north (in scope), however offers only trails of local significance with limited opportunity for significant development.

Shire of Gingin

Existing Trail Offering	The Shire of Gingin has a range of attractive landscapes, notably the coastal area anchored by Gingin, Guilderton and Lancelin, and, further inland, rolling hills and farmlands. The Moore River and the coastline are two of the Shire's greatest natural attractions with some local level walking trails in place: There are no formally recognised mountain bike trails. Existing trails include: • Gingin Town Heritage Trail • Moore River and Silver Creek Trails • Lancelin Coastal Path • Moore River Water Trail
Planned Trail Developments	No formal project specific plans beyond upgrades of local trails
Guiding Strategies in Place	Shire of Gingin Trails Masterplan 2018
Concentric Analysis	• Limited local trails • Water activities focus • Dispersal and extended stay node The Shire's Trails Masterplan recognised that there is limited potential for significant trail-specific development. Short walks can be upgraded as added value activities in support of the region's strength in water-based activities (windsurf, dive, snorkel, swim, surf, kayak, canoe) and in food, wine, arts and crafts. Gingin Shire is natural northern oceanside hub for trail-based activity in Yanchep NP to its south and may act as a wedge dispersal attractor linked to expected increase in Bindoon visitation driven by major trail development in that location (to the east). Primary market source opportunity identified in targeting population centres in the northern suburbs of Perth for day and weekend visitation, using local trails as added value propositions and/or itinerary suggestion Gingin as component of mixed coast-plus-inland activity trip (bush and beach).

Shire of Chittering

Existing Trail Offering	Bindoon is a developing trail destination with potential to achieve Regional classification.
	Bindoon is set to become a major Regional mountain biking destination with the near-completion of:
	• Bindoon Mountain Bike and Adventure Park Stage 1 Trails (13km) are under construction with Stage 2 Concept Plan complete • Community bike parks (Clune Park, Muchea, Maryvale Downs).
	Walking trails in and around Bindoon (Chittering LGA) are mostly short, easy walks:
	• Bindoon Tail Trail • Djidi-Djidi Ridge Walk • Stonehouse Walk • Carty Reserve Walk Trail • Wannamal (Historical) Walk.
Planned / Potential Trail Developments	• Ongoing development (major) of Bindoon Mountain Bike and Adventure Park Long Distance Adventure Ride – Toodyay - Avon National Park – Bindoon • Development of community bike parks into more significant (contained) trail offerings • Bindoon to Carty Reserve / Chittering Lakes Trail connectivity.
Guiding Strategies in Place	Chittering Trails Network Masterplan 2013-2023
	Chittering Mountain Bike Masterplan 2016
	Bindoon Trails Network Concept Plan
	Chittering Long Distance MTB Trail Feasibility Report 2023
Concentric Analysis	• Developing Regional Trail Destination • MTB heavy focus • Integrate increased walk/run options • Long distance adventure ride connections south • Accommodation capacity limitations • Close proximity to Northern Perth Metro.
	With a focus on the advanced development of the Bindoon Mountain Bike and Adventure Park, Bindoon has the opportunity to further develop into a Regional trail destination notably for mountain bikers, offering the only major mountain bike facility to the north of, and within close proximity to, the heavily populated Perth Metropolitan area. It represents a closer MTB destination than other equivalent facilities (once Stage 2 is complete).
	Opportunity is to be found in the further development of cycling-based experiences, namely as a trailhead for a long-distance adventure ride linking Toodyay, Northam and on to Midland. Such a route would add value to Bindoon's base trail encouraging extended stay and onward (or inbound) dispersal from neighbouring townships of note (Toodyay, Northam).
	Additionally, there is opportunity to further strengthen Bindoon's trail destination status by identifying and further developing walking trails, both within the Adventure Park site and further afield linking the township to other points of geographical and heritage interest. This would deliver added-value propositions, activities for non-riders (friends and family of riders staying in town), and facilitate potential trail running (or off-road duathlon) visitation and events.

Shire of Toodyay

Existing Trail Offering	Toodyay has limited existing walking and shared use trails and no mountain bike specific infrastructure. Existing walks are of local significance. • Bilya Walk Trail • Friars Rosary Walk
Planned / Potential Trail Developments	• Trail links from Bindoon to the north-west and Northam to the south • Trails Masterplan recommended by Walks Forum (include Avon Valley Trail Masterplan) • Develop and extend existing Bilya Walk into a loop trail • Trail hub with trailhead facilities • Proposed Noongar Trail, focus on Aboriginal cultural heritage • Julimar Conservation Park loop walk • Investigate trail from Walyunga NP and Avon Valley NP to Toodyay • On and off road long distance adventure ride route linking Bindoon-Toodyay-Northam-Midland • Avon River Trail – new trail proposal approximately 270km in length connecting Avon Valley towns of Beverly, York, Northam and Toodyay along the Avon River. The trail has potential to become a sought-after multi-mode adventure experience with users able to walk/run, ride or paddle different sections. Located in the heart of Noongar Ballardong Country there is also opportunity for the trail to have a focus on opportunities to share stories and sites of significance.
Guiding Strategies in Place	No trail strategy in place. Toodyay Walk Tracks Forum Report 2022
Concentric Analysis	• Dispersal node, connectivity target • Accommodation and facilitation supply • Added value attraction (heritage) • Local trails only • Middle proximity to Perth Metro. Located 85km east-northeast from Perth, Toodyay is a popular heritage visitation target for day trippers attracted by its National Trust listing as an Historic Town. The town features an array of studios, galleries, boutique shops, accommodation, wineries, eateries and family entertainment. With reference to trails, Toodyay is a good base to explore the popular Avon Valley National Park (albeit located to the far side of the park relative to Perth), the Avon River being its major geographical feature of interest. It does not currently feature enough trail-based attractions to be considered a trail destination, nor should it seek to be given its proximity to other trail destinations, Bindoon to the north east and York to the south, along with Northam which has stronger trail development potential. Toodyay, therefore is positioned as a support and added-attraction hub, offering more activities, accommodation and catering for trail visitors spread across the region, encouraging dispersal and extended stay. Its strength lies in attraction of overnight accommodation for non-camping visitors wanting to explore nearby Avon Valley National Park, and for adventure cyclists, existing or potential based on proposed adventure ride links incorporating Toodyay, specifically the proposed long distance cycle route Bindoon-Toodyay-Northam-Midland.

Shire of Northam

Existing Trail Offering	Northam currently has a limited range of trails across the different trail user types. None of the existing designated trails in the region are characterised by formalised trail towns or centres. Experiences vary from short walks (less than 1km), to half day walks / trail runs and mountain bike rides, through to multi-day bushwalks/rides. The Region as a whole contains 64km of designated sanctioned trails (walk, MTB, cycle, horse).
	Notably, Northam is the terminus of the longer distance Kep Track (hike, ride, equestrian). Existing trails include:
	• Kep Track (shared use)
	• Mount Ommanney (shared use)
	• Domtj Kooliny Track (shared use)
	• Nannamulle Brook Trail (Walk)
	• Warranine Homestead Trail (Walk)
	• Lion Loop (Walk)
	• Clackline Brook Flora Trail (Walk).
	• Rail Heritage Trail – Mokine Road-Spencers Brook
	Northam is also home to the The Bilya Koort Boodja Centre for Nyoongar Culture and Environmental Knowledge on the foreshore of the Avon River in Northam's CBD. This high-quality regional tourist attraction offers an interactive educational experience that recognises the rich Aboriginal and environmental presence in the Nyoongar Ballardong region.
Planned Trail Developments	• Upgrade and connectivity developments for Dorntj Kooliny Trail, Clackline Rail Trail and other local trails (includes bridge construction development)
	• Planned upgrade and development of Mount Ommaney ride and shared use trails – trail planning grant submitted
	• Upgrade and connectivity developments for Kep Track
	• Avon River Trail – new trail proposal from the headwaters in Yearlering to Wulyunga pool in Bullsbrook, approximately 270km in length. The trail would connect Avon Valley towns of Beverly, York, Northam and Toodyay along the Avon River. The trail has potential to become a sought after multi-mode adventure experience with users able to walk/run, ride or paddle different sections. Located in the heart of Noongar Ballardong Country there is also opportunity for the trail to have a focus on opportunities to share stories and sites of significance.
Guiding Strategies in Place	Northam Trail Masterplan 2022
Concentric Analysis	• Local trail destination (exception: Kep Track)
	• Regional trail destination potential with development (differentiation: shared use, cultural and paddle integrations)
	• Connectivity and facilitation (accommodation etc) hub
	• Major Aboriginal Cultural Heritage destination (focus for trail development)
	• Middle proximity to Northern Perth Metro.
	The only existing trail of Regional significance in Northam is Kep Track, although its trailhead experience and infrastructure is lacking and it currently finishes outside of the township.
	Northam's overall trail destination status would be significantly improved by upgrades to existing trail quality, connectivity and a focus on local trails aligning to start/finish at the Bilya Koort Boodja Centre. This would further emphasise the strength and opportunity for Aboriginal cultural tourism and entwining cultural heritage and storytelling into each connected trail experience.

A development prioritisation of Northam's potential strength in multi-mode shared use trail (walk, run, ride, paddle) and existing opportunities to be leveraged in the Aboriginal Cultural Heritage and storytelling space, gives a pathway to potentially becoming a Regional Trail Destination of significant differentiation to others in the study, and specifically to that of nearby (but connected) York, which has prioritised strengths in mountain biking development.

Further feasibility investigation of the Avon River Trail (proposed) is supported under this analysis.

Leveraging the potential for paddle trails connected to walk trails and the guided tour and hire opportunities available would deepen and differentiate the experience offering and tie into Northam's heritage as the start of the famous Avon Descent paddle event.

Mount Ommanney has potential for added value development, currently proposed mountain bike, shared use and walk. Technical mountain biking development would remain at a local, added value level, with nearby York better placed to leverage that particular ride market.

Shire of York

Existing Trail Offering	A town of historical significance, York features two imposing and unique landforms of Mount Bakewell and Mount Brown which offer opportunities to create a collective trail network of Regional note, encompassing the town centre, the Avon River, and potentially both peaks. Wongborel/Mt Brown has organically developed into a mountain biking (and hike/run) network of significance, albeit all trails are officially unsanctioned. Trails include: • Avon River Trail (shared use) • Unsanctioned (but well used) single track at Wongborel /Mt Brown (shared use, some MTB only) • Promoted heritage trails (walk).
Planned Trail Developments	• Wongborel / Mt Brown Trail Network • Walwalying / Mt Bakewell Summit Walk Trail • Gogulgar Bilya / Avon River (upgrades, extensions, connectivity). • Avon River Trail – new trail proposal approximately 270km in length connecting Avon Valley towns of Beverly, York, Northam and Toodyay along the Avon River. The trail has potential to become a sought-after multi-mode adventure experience with users able to walk/run, ride or paddle different sections. Located in the heart of Noongar Ballardong Country there is also opportunity for the trail to have a focus on opportunities to share stories and sites of significance.
Guiding Strategies in Place	York Trails Master Plan 2019-2026 York Trail Network Concept 2022 Mt Brown Trail Maintenance Guide 2019
Concentric Analysis	• Regional trail destination potential • MTB hub focus (Wongborel /Mt Brown) • Added value walking trails • Connectivity and facilitation hub. Ideally located only an hour east from Perth, York already has significant tourism value in its heritage, agricultural/produce and event offerings. Further, it has developed a moderate amount of trail offerings, notably along the Avon River and on the slopes of the imposing Wongborel/Mt Brown, which is a particular magnet for mountain bikers (including events). Ideally situated with Northam and Toodyay to the north, and Beverley/Pingelly to the south, it is the stand-out eastern trail epicentre and ideally located as a dispersal attractor for visitors further north or south. It has a higher accommodation ration than many other nearby townships and its variety of attractions both on and off trail makes it prime for an approach of strengthening tourism visitation via improved and expanded trail attractions.

Shire of Beverley

Existing Trail Offering	• Town Heritage Trails (Vincent Street Heritage Walk award winning trail for best Tourism product category at WA Heritage Awards) • Avondale Discovery Farm Bushland Trail • Beverley Town Walk • Mount Dale Circuit • Bibbulmun Track • Christmas Tree Well Walk • Six 'Walk GPS' walks are informal bushwalks not recognised by DPAW • Avondale Discovery Farm Drive Trail.
Planned / Potential Trail Developments	• Shared Use Trail along Avon River – Commonage Hill 10-12km • Cycle routes linking townships Beverly-York (Avon Central Cycle Strategy) • Beverley Heroic Cycle Route (Adventure Ride - potential) • Pioneers Trail (County Peak Trail) • Redevelop trail network at Avondale Discovery Farm including Avondale Link Trail • Reinvigorate Mount Dale Circuit (DPAW) / realign Bibbulmun Track to Mount Dale. • Avon River Trail – new trail proposal approximately 270km in length connecting Avon Valley towns of Beverly, York, Northam and Toodyay along the Avon River. The trail has potential to become a sought-after multi-mode adventure experience with users able to walk/run, ride or paddle different sections. Located in the heart of Noongar Ballardong Country there is also opportunity for the trail to have a focus on opportunities to share stories and sites of significance.
Guiding Strategies in Place	Shire of Beverley Trails Master Plan 2014 (revisited)
Concentric Analysis	• Supporting trails • Dispersal driver linked to York, Pingelly/Dryandra • Adventure Ride focus • Middle proximity to Perth Metro. Beverley offers local trails with no trail or network of Regional status, however as a township node enroute between York to the north and Dryandra (Pingelly/Narrogin) to the south, its trail and heritage offering is identified as an added value that should be captured in regional trail-destination marketing. It has a strong adventure cycling (road, gravel grind and bike packing) background (past Beverley Heroic backcountry road ride) and should be considered for any development of Adventure Cycling as a linked destination piece, with consideration to identifying dirt/gravel road routes in preference to sealed roadways, and well-placed points of interest/features. May be preferentially linked north to York and west to Wandoo National Park for gravel grind loops. Any development of Pingelly to the south via Dryandra makes Beverley well placed as a dispersal driver for the Adventure Cycling market, with other trails and historical attractions as add-on drawcards.

Shire of Pingelly

Existing Trail Offering	Limited existing trails, none of destination note
Planned / Potential Trail Developments	• Mountain biking trails – town centre (10km) • Pump Track and Skills Trails.
Guiding Strategies in Place	Pingelly Mountain Bike & Cycling Strategy 2022-2026
Concentric Analysis	• Dispersal and extended stay node, • Connectivity target (Dryandra Woodland-Narrogin-Pingelly Adventure Cycle Zone) • Accommodation and facilitation (food, service) supply • Added value attraction (if MTB trails developed) • Local trails only • Distant from Perth Metro. Pingelly currently seeks to develop approx. 10km of mountain bike trails along with a pump track and skills park in its town centre. This would not mark the township as a trails destination, especially given it is located farther from Perth Metropolitan than other trail destinations in study that (already) contain more trail stock. Pingelly's strength lies in its proximity to the Dryandra Woodlands, which in conjunction with Narrogin to the south and Williams or Boddington to the west, could collectively become a more significant trails destination, especially for adventure riders (gravel grinders and bike packers). Narrogin has existing if informal mountain bike stock. Pingelly's development of 10km of trail adjacent the town centre adds collective weight to the overall offering. The primary strategy beyond implementation of any trail-centric local trails would be to develop the service offering: quality accommodation, food, beverage and local produce, along with potentially an event that bases from Pingelly, but uses Dryandra as the exploratory visitation zone. In this way, it remains possible for Pingelly to develop a 'cycling culture' as per its MTB and Cycling Strategy, without requiring significant trail infrastructure development beyond local trails.

Shire of Narrogin

Existing Trail Offering	Narrogin has a heritage focus within its township, featuring a Heritage Walk, with three primary trail networks located adjacent to the township for walking with some informal (but recognised) mountain bike trails: • CBD Heritage Walk • Foxes Lair (5 walk trails, some shared use and single use informal MTB) • Railway Dam Trails • Gnarojin Park (cultural significance) • Narrogin is also located within proximity to the Dryandra region, a landscape of some significance with walking trails, camps and cultural, flora and fauna attractions.
Planned Trail Developments	• Foxes Lair Trails Upgrade • Railway Dam Trails Upgrade • Gnarojin Trails Upgrade.
Guiding Strategies in Place	Narrogin Walks Trails Masterplan 2019 Gnarojin Park Masterplan Narrogin Pump Track and Mountain Bike Trail Feasibility Study 2019
Concentric Analysis	• Dispersal and extended stay node • Connectivity target (Dryandra Woodland-Narrogin-Pingelly Adventure Cycle Zone) • Accommodation and facilitation (food, service) supply • Added value attraction (incl MTB trails) • Local trails only • Distant from Perth Metro. Foxes Lair, the Commonage and Railway Dam were all recommended in the Pump Track and MTB Trail Feasibility Study as appropriate sites for development of purpose designed mountain bike trails of up to approx. 20km. Such development would remain as a local trail designation, however if considered as a component of nearby Dryandra Adventure Ride potential, and in collaboration with local MTB trail development in nearby Pingelly (north), Narrogin would have high value as an added-value proposition for cycle tourism and increase dispersal and potential extended stays according to the Wedge model of trail destination travel.

Shire of Cuballing / Dryandra Woodlands

Existing Trail Offering	Backcountry dirt touring roads Short walking trails in Dryandra including: • Lol Gray Trail (12km) • Lol Gray Loop (3km) • Wandoo Trail (3km) • Ochre Trail (5km) • Breakaway Walk (1km) WA's newest National Park. Stronghold for some of Australia's rarest and most vulnerable wildlife, including numbats, woylies, brushtail wallabies, chuditch, quenda and the mound-building malleefowl. Yornaning Dam MTB trails / Kooloot Biddi Trail
Planned / Potential Trail Developments	No planned trail developments at present within the Dryandra Woodland proper, although 2011 Dryandra Woodland Management Plan proposes development of mountain bike trails in the western region of the park, and recommends linking Dryandra ride experiences to Narrogin offerings. Potential as an adventure cycling (gravel grind / back country bike packing) zone requiring no physical trail construction Overnight trail – planning in progress
Guiding Strategies in Place	Dryandra Woodland Management Plan (DPAW) Mentioned in Narrogin Pump Track and Mountain Bike Trail Feasibility Study 2019
Concentric Analysis	• Potential for Regional 'Zone' Destination (in association with supporting hub Pingelly, Narrogin, Boddington) • Adventure ride focus • Short walk, strong biodiversity focus • Event potential with facility • Accommodation development potential • Distant proximity to Perth Metro. 2011 Dryandra Woodland management plan proposed development of mountain bike trails in the western region of the park, however no development has since been initiated. Cyclists already use the fire roads and management roads and the nearby township nodes of Narrogin and Pingelly to the east are well placed to leverage tourism/ economic benefits from this destination if developed as an adventure cycling destination. Narrogin and/or Pingelly are, even with proposed mountain biking developments, not in and of themselves at a capacity or of a magnetism to achieve Regional trail destination categorisation. However, should Dryandra be positioned and developed (not necessarily requiring new trails, given adventure cycling focuses on dirt / backcountry roadways within landscapes of significance), the overall Dryandra and surrounding townships would collectively become a critical mass of attraction, enough to be considered a Regional Trail destination. Any mountain biking and/or walking trail development in the Dryandra/Narrogin/Pingelly region therefore has added impetus as added value infrastructure, albeit remaining individually as local developments. As a region inclusive of Dryandra, Narrogin, Pingelly and townships to the west of Williams and Boddington, the Dryandra Woodlands would be at the epicentre of a collective trails destination of Regional worth.

Shire of Wandering

Existing Trail Offering	• Bibbulmun Track and Munda Biddi both pass through Shire of Wandering (northern area) • Mount Cooke – 11km walk trail in the Monadnocks National Park • Close to Dryandra Woodlands walk / ride offerings • Close to Boddington walk / ride offerings
Planned Trail Developments	No formal development plans in place
Guiding Strategies in Place	No formal trails masterplans in place
Concentric Analysis	• Limited local trails • Support node for Boddington and Dryandra trail offerings Located between Boddington to its west and Dryandra Woodlands zone to the east, Wandering's only significant trail offering within Shire are sections of the Munda Biddi and Bibbulmun Track in the north (and not feasibly connected to the village of Wandering. There is no other significant trail infrastructure approaching Regional significance. Any trail local development potential should be focused on identifying and improving any short walk / day walk or loop walk sections of the Munda Biddi and Bibbulmun, and any likely connectivity corridors. Wandering village could potentially be identified as a western base for exploring the proposed Dryandra Woodland adventure ride zone and/or walking trails, and therefore should be included as a service base (accommodation potential) in collective messaging alongside Pingelly, Cuballing, Narrogin and Williams, pending availability of such services. It may also leverage nearby Boddington's development of local-level trails, both ride and walk, again as an alternative hospitality base.

Shire of Williams

Existing Trail Offering	Williams Heritage Trail (1km town walk)
Planned Trail Developments	Future Development being investigated for a walk trail from the Williams Nature Reserve to McKenzie Road lookout Opportunity to connect to surrounding towns via disused rail trail. Multiple creek/river crossings requiring infrastructure investment
Guiding Strategies in Place	No formal trails masterplans in place Williams Local Bike Plan 2005-2020 (intratown transit cycling)
Concentric Analysis	• Limited local trails • Support node for Dryandra and Boddington Limited existing or opportunity for walk or ride trails beyond local significance. Williams village could potentially be identified as a western base for exploring the proposed Dryandra Woodland adventure ride zone and/or walking trails, and therefore should be included as a service base (accommodation & catering potential) in collective messaging alongside Pingelly, Cuballing, Narrogin and Wandering, pending availability of such services. It may also leverage nearby Boddington's development of local-level trails, both ride and walk, again as an alternative hospitality base.

Shire of West Arthur

Existing Trail Offering	- Collie to Darkan Rail Trail - Nangip Creek Walk Trail - Hillman Walk Trail
Planned Trail Developments	Extension of Collie to Darkan Rail Trail through to Williams and Narrogin, placing Darken as a stop-over node. Shire of West Arthur has also identified the long-term potential of - another rail trail between Bowelling and Duranillin - a spur trail to Hillman Nature Reserve. A planning grant has been submitted. Access currently only through private farmland
Guiding Strategies in Place	No formal trails masterplans in place
Concentric Analysis	- Limited local trails - Support node for Collie - Added connectivity value via Rail Trail Shire of West Arthur with Darken as its main township hub offers local level and added value trail experiences primarily via the Collie to Darken Rail trail. Any extension of the rail trail through to Williams in the north east, or development of spur trails would bring much needed connectivity, and unlock the potential to tap into an adventure ride market looking to ride from established trail destination Collie in the east all the way to proposed adventure ride destination, Dryandra Woodlands and associated support villages. Non technical off road routes such as rail trails are highly attractive to adventure riders (gravel grinders and bike packers). There is leverage opportunity in developing potential accommodation, catering, added value attraction as a support / facilitation / transit node for the ride market coming out of Collie. The West Arthur locality therefore remains a support node best suited to offering added value attractions and facilitation to visitors targeting nearby trail destinations

Shire of Brookton

Existing Trail Offering	Boyagin Rock – cultural significance in area
Planned Trail Developments	No formal plans
Guiding Strategies in Place	No formal trails masterplans in place Next Generation Brookton 2020
Concentric Analysis	Limited trails (cultural attraction) Limited potential for trail-specific development given non-appropriate landscapes. Short walk and cultural interpretation opportunity at Boyagin Rock. Leverage potential development of nearby Pingelly and Dryandra as an adventure ride zone targeting through visitation from the north (Beverley etc) based on Wedge Dispersal model of encouraging tourism flow from one trail destination to another. Ensure any relevant itinerary marketing includes Brookton / Boyagin Rock.

10.2   Peel Region

OVERVIEW

Peel region is located 1-2 hours' drive south of Perth and is constituted by five Local Government Areas:

- Serpentine-Jarrahdale

- Murray
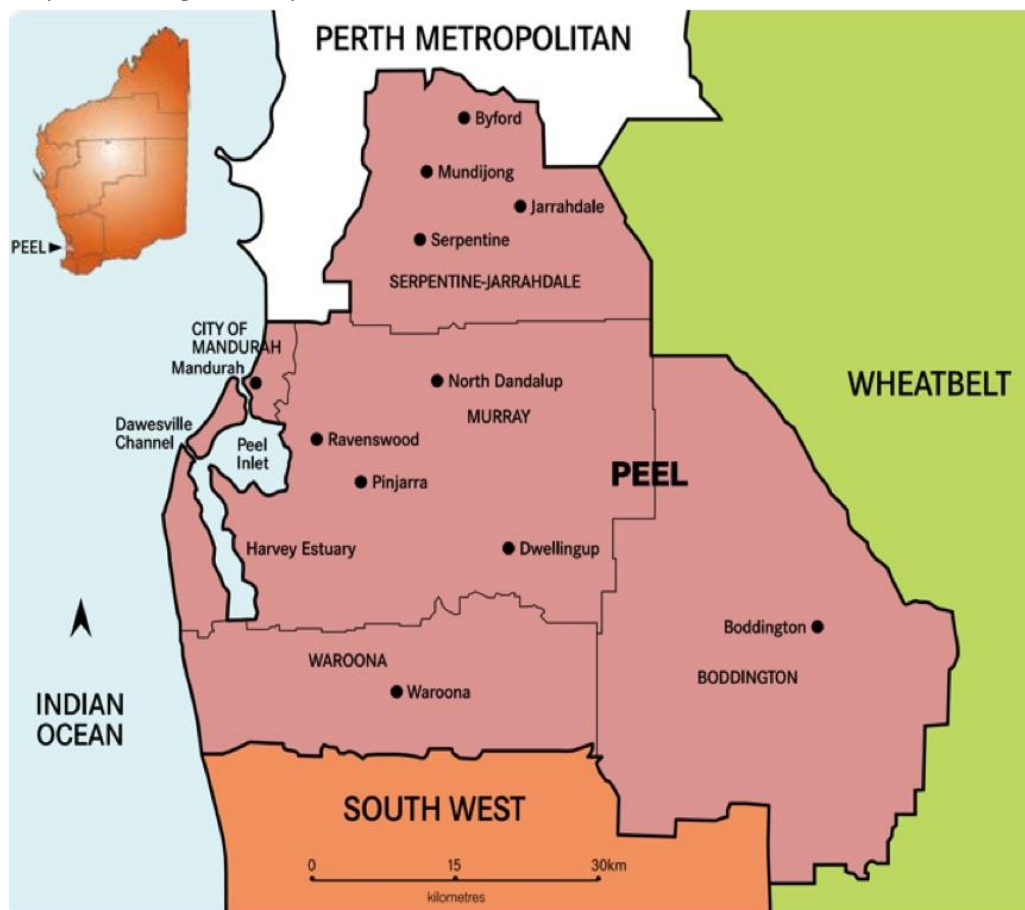
- Mandurah

- Waroona

- Boddington

The region has extensive wetlands that are of international and national significance and support diverse and unique flora and fauna. There is a variety of tourism experiences ranging from historic towns such as Pinjarra, to the Serpentine National Park and other regional assets that provide a base for nature tourism.

Peel hosts Western Australia's only trail destination of National Significance in the Dwellingup Adventure Trails, with Dwellingup aspiring for recognition as a 'Trail Town' by Trails WA. Jarrahdale has aspiration for Trail Town designation, noting the accreditation program as at June 2023 only recognises destinations with a focus on Mountain Biking or Hiking.

A comparatively small region with a high concentration of significant landscapes, Peel hosts a high density of trail-based destinations. This creates the imperative to ensure its trail-based destinations are diverse, complementary, add value to each other and do not unnecessarily compete for similar markets.

The Peel Region has a Peel Regional Trails Masterplan that strategically guides trail development across hiking and mountain biking. It also has a Perth & Peel Mountain Biking Masterplan directing mountain biking trail development across the region.

Map 7: Peel Regional Map

Shire of Jarrahdale-Serpentine

Existing Trail Offering	The Shire is a significant destination for horse riding with a strong equine community and trail offering. Equine trails are out of scope for this report, however notable for representing possible added value drawcards for trail-based visitation. Jarrahdale is accessible to 32 trails/networks comprising 20 bush and urban walking trails, two shared use trails, two mountain biking trails/networks and eight bridle trails/networks. Existing walk trails include: • Balmoral Trail – shared use trail with interpretation elements relating to the historic timber industry and railway • Bibbulmun Track – long distance walk trail which extends from Perth to Albany • Munda Biddi Trail – long-distance, off-road cycling trail that extends from Perth to Albany. Walkers are permitted on this trail which shares the Balmoral alignment for part of its length • Various walks in Serpentine NP • Kitty's Gorge Walk • Gooralong Brook Walk. Existing MTB trails include: • Langford Park network • Munda Biddi. Trail events include: • Truth or Consequences Trail Run • Snakes N Ladders Trail Run • Sly Fox Trail Run • Jarrahdale Endurance Hike with Off The Beaten Track.
Planned / Potential Trail Developments	There are a number of trail developments underway within the Jarrahdale-Serpentine Shire which form part of a progression towards the intention of establishing Jarrahdale as a 'Trail Town', these include: • Mounts Loop Trail • Byford Trail Centre including linking into Wungong Regional Park; • Mundijong to Jarrahdale Rail Trail • Jarrahdale Oval Trail Head • Langford Park MTB network development $400,000 confirmed investment.
Guiding Strategies in Place	• Peel Regional Trails Strategy 2019 • Serpentine Jarrahdale Trail Development Business Case • The Jarrahdale Oval Recreation Space and Trail Head Master Plan • Jarrahdale Trail Town Business Case and Implementation Plan 2021.
Concentric Analysis	• Regional Destination • Trail Town aspiration • Closest proximity to Perth Metro (of Peel / Wheatbelt) • Trail diversity (hike, MTB, equine) • En route to State/Signature Dwellingup • Extended stay and added value potential. As the closest trail destination to South Perth Metro source market, Jarrahdale and Serpentine NP offer accessible trail experiences across a diversity of trails in high quality landscapes. Its strength lies in equine and walk/run trails (heavy concentration of trail run events) more so than mountain biking. Jarrahdale must compete with a strong gravitational pull-through of trail visitors exerted by more significant trail destinations to the south in Dwellingup, Collie and

Margaret River. This requires Jarrahdale to develop a stronger focus on experience differentiation, targeting of the day trip market and attempting to slow / stop the through-travel markets for extended stay options.

Trail developments should concentrate on features of differentiation from other trail destination offerings in the south and on developing quality trail tourism facilitation in terms of accommodation, hospitality and added value attraction, which destinations such as Dwellingup may lack (i.e. accommodation variety and quality).

Mounts Loop Trail project seeks to link the town of Jarrahdale to the Bibbulmun Track and offers an excellent opportunity to attract the weekend Perth Metro walking market, especially if fully developed as a loop.

A concerted focus on hiking trails would deliver adequate differentiation from more MTB-focused Dwellingup and Collie hubs further south and further justify Jarrahdale-Serpentine's investments in Regional destination status despite it being in close proximity to others. Notably there has been a recent announcement of $400,000 investment in upgrading Langford Park MTB network. Located as the closest to the Perth Metro area, it has capacity to attract day visitors that Dwellingup may not, however also competes with other advanced MTB facilities located within the Perth Metro area for the same market.

Shire of Boddington

Existing Trail Offering	• Boddington Rail Trail / Tullis Bridge Trail • Ranford Pool Walk Trail
Planned Trail Developments	• Boddington Williams Reserve MTB Trail Network • Boddington to Dwellingup Rail Trail
Guiding Strategies in Place	Boddington Williams Reserve Trail Network Broad Concept Boddington Trail design and experience site assessment Peel Regional Trails Strategy 2019 Perth and Peel Mountain Bike Masterplan / Boddington Local Trail Plan
Concentric Analysis	• Local trails • Significant local development planned (MTB) • Added value attractor • Dispersal and facilitation hub • Inner proximity to Perth Metro Boddington is located only 30 minutes' drive to the east of the Signature trails Destination of Dwellingup, with plans for significant mountain biking development as identified in the Perth and Peel MTB Masterplan. It is popular with weekend visitors and features a redeveloped Hotham Park recreation area including pump track and kayak launch onto the Hotham River. It's biggest event in non-trail: the Boddington Lions Rodeo is the state's biggest. This places MTB trail development as added value / dispersal trails. There is some risk of oversupply with consideration to any MTB trails developed to a differentiated style and feature level of Dwellingup – nominally XC as noted in Boddington Williams Reserve Trail Network Broad Concept) MTB, given Dwellingup's more manicured MTB supply. Boddington is on the far fringe of Dryandra Woodlands and therefore has potential as a dispersal attractor capturing visitors travelling from Dwellingup across to Dryandra Zone for the unique landscapes and biodiversity experiences available there (especially for long distance adventure ride market, potentially spreading from Munda Biddi). Cycle-based visitation to Boddington would be strengthened with the development of the Boddington – Dwellingup Rail Trail as proposed in the Boddington Strategic Community Plan 2019-2029. Collie – another major trail development zone – is located further south, the challenge for Boddington is to convince visitors to travel east prior to travelling further south (or en return route), using the collective pulling power of both proposed local trails and the Dryandra Adventure Ride Zone (proposed).

Shire of Murray

Existing Trail Offering	The Murray region of Peel hosts Western Australia's only (current) Nationally Significant Trail Destination in Dwellingup Adventure Trails. The trail network mostly is located in a corridor aligned north south with Munda Biddi travelling through its centre along with the Bibbulmun Track intersecting. Trails include: • Dwellingup Adventure Trails (network of MTB and hike trails including Marrinup & Turner Hill, Dwellingup MTB Trails, Murray Valley MTB Trails,) • Munda Biddi • Bibbulmun Track • Waterous Trail (MTB loop off Munda Biddi). • Pinjarra Heritage Walk / Pinjarra Murray River Walk • Events include: • Mighty Jarrah Trail Run • Dwellingup 100 MTB • WTF (Waterous Trail on Foot) 50 / 100 miler trail run.
Planned Trail Developments	Further development and improvements of Dwellingup Adventure Trails
Guiding Strategies in Place	Peel Regional Trails Strategy 2019 Perth and Peel Mountain Bike Masterplan Dwellingup Futures
Concentric Analysis	• Signature trail destination • Trail Town aspirations • Epicentre for Peel region • Trail infrastructure near completion / volume capacity • Facilitation challenges – hospitality and services • Opportunity to develop extended stay (including working with co-located support trail destinations and dispersal). Dwellingup is in its final phases of trail development and stands alone as Western Australia's highlight multi-user Signature Trail Destination. There remains some development to be complete, however the destination's main challenge moving forward is off trail in building its capacity to deliver on accommodation, food and catering. Rental crises have restricted access to hospitality and tourism workforce, in turn restricting operational capacity for many trails-related businesses. This limits capacity and impacts negatively on visitor experiences. Nevertheless Dwellingup, like Derby in Tasmania, serves as a role model for trail destination development (especially in terms of trail infrastructure and marketing) with learnings of value for other aspirational trail destinations, particularly in Wheatbelt Region.

Shire of Harvey

Existing Trail Offering	Range of local trails including: • Lake Brockman Loop • Harvey Wildflower Ridge Walk • Heathlands Walk • Harvey Dam Walk Loop • Leschenault Peninsula Ridge Walk • Hoffmans Mill Trail • Beach walks (i.e. Leschenault Peninsula Conservation Park; Binningup to Myalup)
Planned Trail Developments	• Harvey Region Trails and Adventure Plan in development (open for community comment) • opportunities around Harvey Dam (including links from heritage precinct), Lake Brockman, Korjikup Conservation Area • connections to Munda Biddi, Myalup/Lake Preston • opportunities to master plan beach and hinterland informal trails around Myalup
Guiding Strategies in Place	None in place. Harvey Region Trails and Adventure Plan "positioning the Harvey Region as the gateway for the Trails and Adventure network in Australia's South West" is in development. The Harvey Region Trails and Adventure Plan has been divided into four priority areas that require consideration and development to support the growth of trails and adventure activities: 1. Create a signature trail and adventure hub 2. Provide complementary immersive experiences 3. Implement robust and sustainable governance 4. Market and promote the experiences on offer.
Concentric Analysis	• Local trails • Connectivity potential (Munda Biddi) • Some differentiation in beachside and lakeside trails • Facilitation / dispersal node Harvey represents opportunity for one of only two ocean-side trail regions in the study area (the other being Mandurah to the north). There are no significant formal trails in region at present, although walking trails around Lake Preston, Myalup and Leschenault Peninsula Conservation Park are used by locals (and some visitors – although none are currently 'destination' trails). Proximity to Munda Biddi presents opportunity to link the township of Harvey to the trail, potentially creating a loop trail. Water catchment areas may present challenges with route alignments, however adventure cycle routes can be created using back country roads as alternative link options. Harvey is an en route locality for trail visitors headed south from Perth or Dwellingup to Collie or Margaret River, presenting opportunity to capture the transit market overnight. As such, consideration should be given to facilitation measures, including opportunity to improve accommodation, catering and added value attractions, especially water-based activities (i.e. soft adventure paddling). This would dovetail with in-draft Harvey Region Trails and Adventure Plan that positions the region as a 'gateway' destination, making added-value activities the key ingredient (recognising that Dwellingup to the north and Collie to the south offer higher level of offerings in the mountain biking sphere in particular, and Margaret River and the Cape to Cape offer a higher level of offering in the walking sphere).

Shire of Mandurah

Existing Trail Offering	City of Mandurah Shire is a smaller region with limited urban and peri urban trails, many linked to waterways and coast, and including: • Halls Head Coastal Path (shared use) • Erskine Nature Trail • Joseph and Dulcie Nannup Trail • Island Point Reserve Circuit • Mandurah Public Art (Heritage) trails • Mariner's Cover Walk • Samphire Cove Walk • Other short peri-urban walks
Planned Trail Developments	• Halls Head Shared Coastal Path due for completion • Consultants also engaged to develop a signage guide for the City, a Master Plan for a trail around the Estuary (Round the Estuary Trail), and signage and mapping for paddling trails (with planning and procurement works for an all abilities paddle launch site already underway). • Yalgorup National Park project aims to develop a range of environmentally sustainable trails, attractions and accommodation within Yalgorup National Park. Environmental assessment and design planning underway. State funding secured to partially assist with detailed planning and implementation, the City is investing in the long-term tourism potential of the Yalgorup National Park. • NB: paddle trails (outside scope of this report) have received funding for development
Guiding Strategies in Place	Transform Mandurah Economic Opportunities Report 2022
Concentric Analysis	• Local (peri-urban) trails • Differentiation node (beachside trails) • Water activities focus • Strong facilitation support node (accommodation, catering, services) • Eco-tourism with trails support element Mandurah is positioned as a major coastal destination, known for its beaches, waterways and coastal paths. It has limited available landscapes for the development of specific Regional-level trails, however is ideally sited as a major accommodation and added attraction destination. It lies within proximity to major trail destination Dwellingup (and is the nearest large city / facilitation centre for that destination, which has limited serviceability / capacity for accommodation and catering). A major point of difference is the availability of paddle trails and family-friendly local trail options, along with the beach aspect and convenience of higher density of holiday services and entertainment. With development of some in planning trails, including the Yalgorup National Park eco-attraction concept, Mandurah can seek to leverage overnight and extended stay trails visitors by focusing messaging in its diversity of accommodation and catering, along with added value events and offerings (i.e. paddling) to target and attract visitors focused on Dwellingup and those travelling further south to Collie / Margaret River region.

Shire of Waroona

Existing Trail Offering	The Shire of Waroona stretches between the Indian Ocean and the Darling Scarp, featuring pristine beaches, coastal lakes, fertile farmlands and peaceful jarrah forests. Covering a total area of 835km^2, the Shire includes the localities of Waroona, Hamel, Lake Clifton and Preston Beach. Waroona covers Lane Poole Reserve South of the Murray River, which includes a significant portion of the 'Dwellingup Adventure Trails' network, including King Jarrah Track (walk) and Murray Valley / Southern Shore Circuits (MTB) – these most often accessed from Dwellingup. Waroona also features a section of the Munda Biddi (cycling) trail inclusive of the Waterous Loop, popular as a ride attraction. Trails in the locality include: • Waroona Heritage Trail (walk or drive) • King Jarrah Track, Lane Poole Reserve (18km loop) • Island Poole Walk Trail, Lane Poole Reserve (1.5km loop) • 4x4 Nanga Heritage Circuit, Lane Poole Reserve (51.3km loop) • Lake Preston Walk Trail (2km) • Noise Scrub Bird Trail - Drakesbrook Weir • Harvey River Walk Trail - John Tognela Rest Area Forrest Highway • Hamel Wetland Walk Trail - Hamel • Hamel Nursery Walk Trails • Munda Biddi Trail - Waterous Loop (www.mundabiddi.org.au)
Planned Trail Developments	• Lake Clifton Rail Trail / Lime Kiln Trail along the rail corridor (*proposed via Peel Regional Trails Strategy 2019*) • Waroona Lakes Dual Use Trail (*proposed via Peel Regional Trails Strategy 2019*) linking Waroona – Drakesbrook Weir – Waroona Dam with extension to connect to Munda Biddi and Bibbulmun Track. • Walk Trail Waroona to Waroona Dam section has been approved by Council as part of Federal Government $8 million grant for Peel Trails.
Guiding Strategies in Place	Perth & Peel Mountain Bike Masterplan Peel Regional Trails Strategy including Waroona Local Trails Plan Waroona 2030 - Strategic Community Plan 2020-2030 *There is no Waroona Tourism Strategy in place*
Concentric Analysis	• Support node for existing Dwellingup Adventure Trails • Potential to develop as secondary trail access node from west via linking trail from Waroona township to Waterous Loop (cycling) via proposed Waroona Lakes Dual Use Trail • Strong facilitation support node (accommodation, catering, services) • Differentiation node for wetland walking / paddling and wildlife trails. Lake Preston Walk supported by community group FRAGYLE (Friends of Ramsar Action Group for the Yalgorup Lakes Environment). Yalgorup Lakes has international environmental significance. • Potential for eco-tourism accommodation with trails support element • Potential leverage of public transport access (train and bus) Waroona is strategically and beneficially located adjacent to a number of recognised trail destinations including Dwellingup to the immediate north and Collie to the south. Dwellingup has limited serviceability / capacity for accommodation and catering and no public transport access, making Waroona an ideal facilitation extension zone and alternative access node for Dwellingup visitors. It is also a transit capture zone for through-traffic travelling further south to Collie or Margaret River.

|	The Waroona 2023 Strategic Community Plan notes the "development of new trails and enhancement and promotion of existing trails" as an objective with the production of a Waroona Trails Strategy noted as the success measure.
	Implementation of the Peel Trails Strategy, which encompasses the Waroona Local Trails Plan, with prioritisation of the Waroona Lakes Trails and links west to Munda Biddi/Murray Valley.
	A further minor point of difference is the availability – albeit only minorly-activated – of wetland and coastal walking / paddling opportunities on the western coastal fringes within Waroona Shire.

10.3   Long distance trails

Long distance trails by their nature cross many LGA jurisdictions and regions. They provide excellent marketing focus as major trail products but also operate as attractors to short trip, day visit and overnight visitors not looking to undertake end to end journeys.

For Wheatbelt and Peel regions, they can act as visitation catalysts and stay extenders if sub-sections and experiences are included in regional trail tourism marketing. They can also be targeted as components of other regional trails (existing or planned) that loop off them; and act as connectivity corridors linking other trail experiences and towns.

Where intersecting with identified trail-centric LGA's in the study area, and especially where interacting with or routed nearby townships and other proposed significant trail developments, recognised long distance trails should always:

- Be considered for connectivity opportunities to town(s)
- Be considered for connectivity opportunities to other trail networks
- Be considered for appropriate re-routing when it serves best interest of both the long-distance trail and other co-located trails
- Be considered as a component or sector of other proposed long distance trail alignments or other loop trails (of same trail user base)
- Be considered for extension opportunities i.e. Kep Track extensions beyond Northam to York/Toodyay
- Be leveraged in marketing of regional trail destinations
- Have short trip and day trip sectors identified that increase attraction to Regional Trail Destination(s)

Map 8: Long Distance Trails
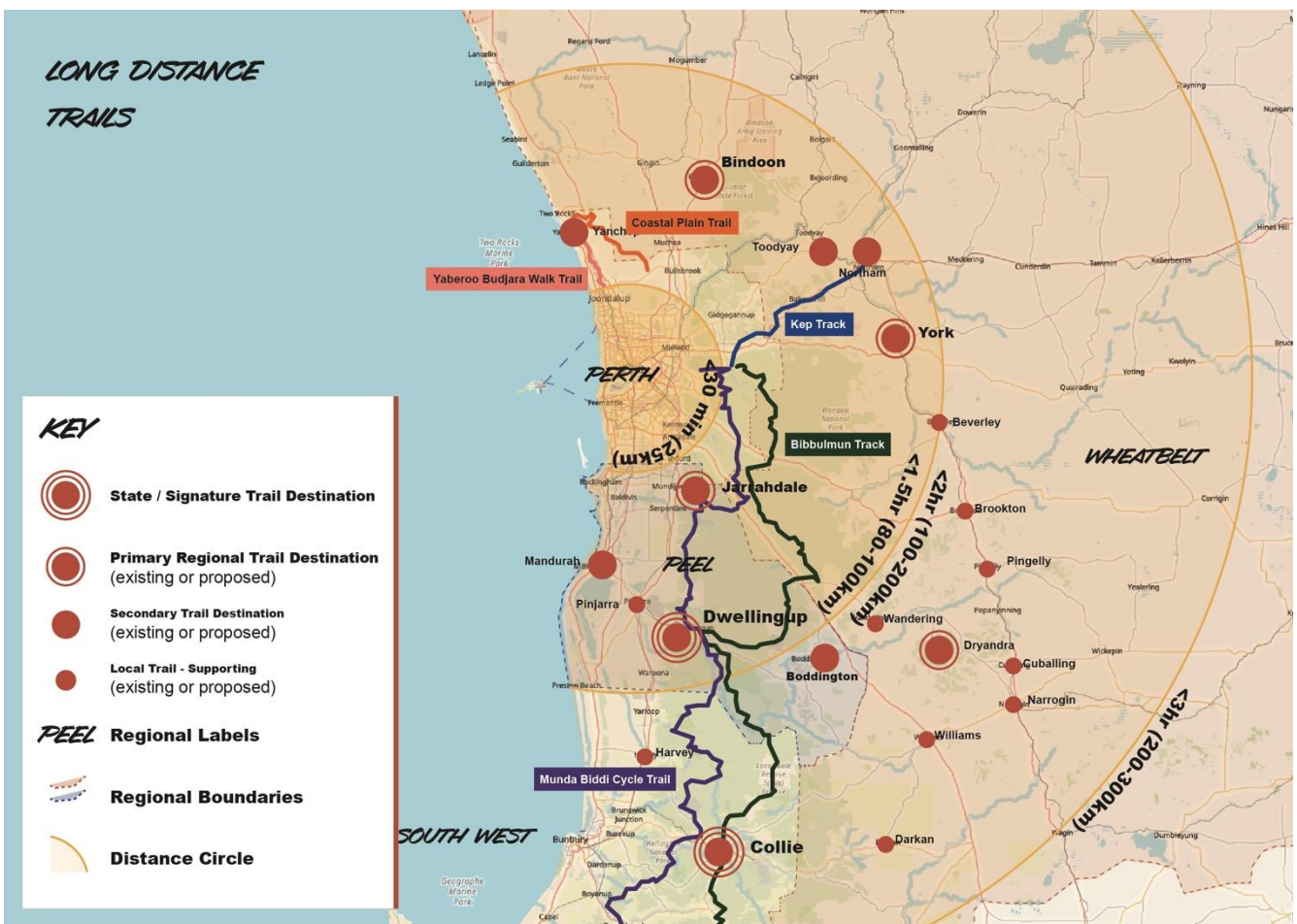
The Long Distance Trails

Munda Biddi – Western Australia's premier long distance off-road cycling experience. Starting in Mundaring, the 1000km trail meanders through scenic river valleys and the magnificent forests of the state's South-West. Joined by purpose-built track, the Munda Biddi (which means path through the forest in the Noongar language) uses a network of bush tracks, firebreaks, and disused railway formations and has sections suitable for cyclists of all ages and experience levels.

Bibbulmun Track - one of the world's great long distance walk trails, stretching 1000 kilometres from Kalamunda in the Perth hills, to the historic town of Albany on the south coast. The Track offers a range of experiences from an eight-week adventure staying in the 49 campsites, to day walks staying in rural towns.

Kep Track – the multi-use 75km Kep Track uses the rail formation between Mundaring in the Perth Hills, to Northam. It is vested in the National Trust with management responsibility falling with Shire of Mundaring and Shire of Northam. The alignment follows an old railway reserve with some sections of on road riding within the Shire of Northam along Clackline Rd and Weribee Road. At Mundaring it connects with the 1,000km Bibbulmun Track eventually joining Albany on the south coast. It also has connectivity with the Munda Bidda Track and Kattamorda Track.

Yaberoo Budjara Heritage Trail – 28-kilometre one way trail based on the movement of Yellagonga and his people between Lake Joondalup and Yanchep. It extends from Neil Hawkins Park in the south to Yanchep National Park in the north, traversing tuart and banksia woodland, coastal heath and former wetlands.

Coastal Plain Walk Trail – three-day, 52-kilometre walk between Yanchep National Park and Neaves Road, in the Melaleuca Conservation Park, traverses the National Park as well as the inland coastal plain. There are three overnight campsites along the way.

Welcoming trails on the Munda Biddi

10.4   Trail Destination Proximity Overview

Map 9: Proximal Locator (2)
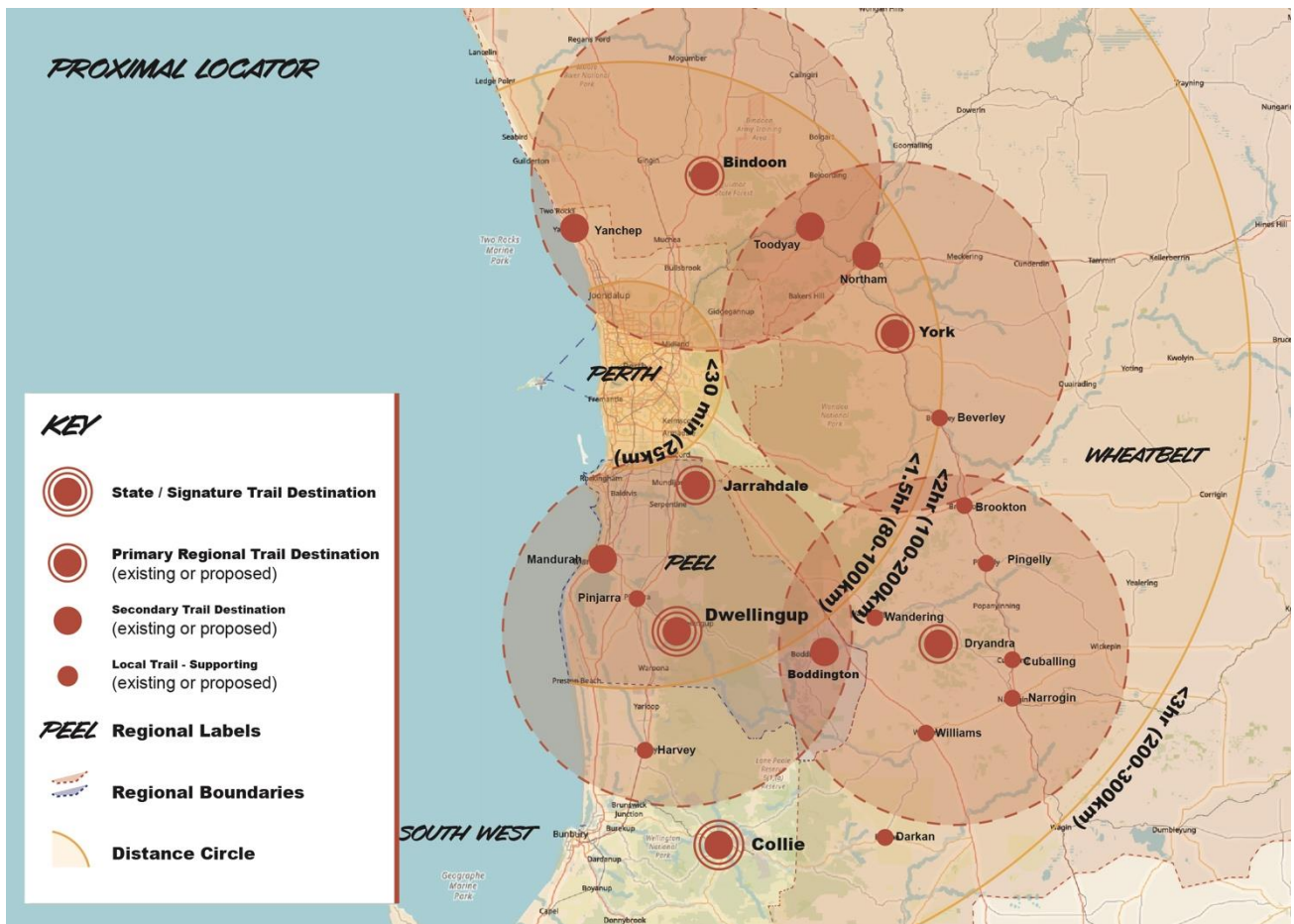
The following table gives oversight of approximate travel times between townships that host some form of notable trail asset. Proximity can used as a guiding measure in reflecting upon the appropriateness of either further trail development or designation as a support node for nearby trail destinations.

Table 2.   Trail Destinations

TRAIL DESTINATION	ASSET	LGA	CONCENTRIC DISTANCE PERTH NORTH	CONCENTRIC DISTANCE PERTH SOUTH	DISTANCE(S) FROM PROXIMAL TRAIL NODES	CLASSIFICATION
WHEATBELT						
Bindoon	Bindoon MTB Trails (in development) Local walk trails	Chittering	45mins	1 hour 10 mins	Toodyay 40 mins Northam 1 hour Yanchep 50 mins	Regional (potential)
Avon Valley National Park	Walking trails (various) Adventure Cycle (gravel road)	Toodyay (part)	1 hour	1 hour 10 mins	Toodyay 20 mins Northam 40 mins	Local

TRAIL DESTINATION	ASSET	LGA	CONCENTRIC DISTANCE PERTH NORTH	CONCENTRIC DISTANCE PERTH SOUTH	DISTANCE(S) FROM PROXIMAL TRAIL NODES	CLASSIFICATION
Toodyay	Heritage trails	Toodyay	1 hour 15 mins	1 hour 15 mins	Bindoon 40 mins Northam 20 mins Avon Valley National Park 20 mins	Local
Northam	Start of Avon Decent paddle Kep track Shared Use (hike/MTB) Short walking trails	Northam	1 hour 15 mins	1 hour 15 mins	Toodyay 20 mins York 20 mins Avon Valley National Park 45 mins	Local
York	Mt Brown shared use trail network (MTB focus) Avon River trails Heritage trails	York	1 hour 20 min	1 hour 20 min	Northam 20 mins Avon Valley National Park 1 hour Beverley 20 mins Kalamunda / Goat Farm (MTB Trails) / John Forrest 50 mins	Regional (potential)
Beverley	Limited local	Beverley	1 hour 40 min	1 hour 40 min	York 20 mins Pingelly 30 mins Kalamunda / Goat Farm (MTB Trails) / John Forrest 1 hr 15min	Local
Pingelly	Limited trails Proposed local MTB trails Dryandra proximity	Pingelly	2 hours	1 hour 45 min	Beverley 30 mins Narrogin 30 mins Dryandra 30 mins Boddington 50 mins Dwellingup 1 hr 20 mins	Local; Potential for support of collective Regional (Dryandra Zone)

TRAIL DESTINATION	ASSET	LGA	CONCENTRIC DISTANCE PERTH NORTH	CONCENTRIC DISTANCE PERTH SOUTH	DISTANCE(S) FROM PROXIMAL TRAIL NODES	CLASSIFICATION
Narrogin	Walking Trails, MTB trails (Foxes Lair, Griffo Circuit, Kooloot Biddi), Heritage Walk Trails Dryandra proximity	Narrogin	2 hours 30 min	2 hours	Pingelly 30 mins Dryandra 20 mins Boddington 50 mins Dwellingup 1 hr 20 mins	Local; Potential for support of collective Regional (Dryandra Zone)
Dryandra	Dryandra Woodland Walk trails, Adventure riding	Cuballing	2 hours 15 min	1 hour 45 min	Pingelly 20 mins Narrogin 20 mins Boddington 40 mins (Williams / Wandering 30 mins) Dwellingup 1 hr 20 mins	Regional (potential)
Wandering	Bibbulmun Track, Munda Biddi, Mount Cooke	Wandering	1 hour 40 min	1 hour 10 mins	Dryandra 20 mins Narrogin 40 mins Pingelly 30 mins Jarrahdale 50 mins Dwellingup 50 mins	Local
Brookton	Culturally significant Boyagin Rock	Brookton	1 hour 50 mins	1 hour 30 mins	Pingelly 15 mins Narrogin 45 mins Dryandra 45 mins Jarrahdale 1 hour 25 mins Dwellingup 1 hour 30 mins	Local

TRAIL DESTINATION	ASSET	LGA	CONCENTRIC DISTANCE PERTH NORTH	CONCENTRIC DISTANCE PERTH SOUTH	DISTANCE(S) FROM PROXIMAL TRAIL NODES	CLASSIFICATION
Williams	Local heritage trail	Williams	2 hours	1 hour 40 mins	Dwellingup 1 hour Boddington 30 mins Dryandra 30 mins Narrogin 20 mins	Local
West Arthur	Collie-Darkan Rail Trail, local trails	West Arthur	2 hours 40 min	2 hours 10 mins	Collie 40 mins Dwellingup 1 hour 15 mins Boddington 1 hour Dryandra 50 mins	Local

TRAIL DESTINATION	ASSET	LGA	CONCENTRIC DISTANCE PERTH NORTH	CONCENTRIC DISTANCE PERTH SOUTH	DISTANCE(S) FROM PROXIMAL TRAIL NODES	CLASSIFICATION
PEEL						
Boddington	Walking / rail trails Proposed MTB network	Boddington	1 hour 50 min	1 hour 30 min	Dryandra 40 mins Pingelly 50 mins Narrogin 1 hour Dwellingup 30 mins Jarrahdale 1 hour	Local
Dwellingup	Multiple MTB trail networks Walking trails Paddle trails Munda Biddi Bibbulmun	Murray	1 hour 20 min	1 hour 10 mins	Jarrahdale 40 mins Boddington 30 mins Dryandra 1 hour 20 mins	State / Signature
Jarrahdale / Serpentine NP	Equine trails Walking trails MTB trails (Langford Park)	Jarrahdale-Serpentine	1 hour	40 min	Dwellingup 40 mins Boddington 51 mins	Regional
Mandurah	Local trails, aquatic trails and activities	Mandurah	1 hour	45 mins	Dwellingup 30 mins Jarrahdale 40 mins Harvey 50 mins	Local
Harvey	Local trails, aquatic trails and activities, close to Collie MTB trails	Harvey	1 hour 40 mins	1 hour 20 mins	Collie 40 mins Dwellingup 40 mins Mandurah 50 mins	Local
Waroona	MTB trails via Dwellingup incl. walking trails, paddle trails Munda Biddi, Bibbulmun Track, aquatic activities. close to Collie MTB trails	Waroona	1 hour 30 mins	1 hour 10 mins	Collie 50 mins Dwellingup 25 mins Mandurah 35 mins	State / Signature (Dwellingup Adventure Trails) + Local

10.5 MASTER PLANS BY DESTINATION

REGION	LGA	TOWNS	TRAILS MASTER PLAN	HIKING MASTER PLAN	MTB MASTER PLAN	OTHER
Wheatbelt	Toodyay	Toodyay	✖	✖	✖	Walk Track Forum Report 2022
Wheatbelt	Northam	Northam	Shire Of Northam Trails Masterplan 2022	✖	✖	✖
Wheatbelt	York	York	York Shire Trails Masterplan 2019-2028	✖	✖	✖
Wheatbelt	Beverley	Beverley	Shire of Beverly Trails Masterplan	✖	✖	✖
Wheatbelt	Chittering	Bindoon, Lower Chittering, Muchea	Sport and Recreation Plan 2021-2031 Incorp. Trails Network Master Plan 2013-2023	✖	Mountain Bike Trails Masterplan 2016	Chittering_ MTB Feasibility Study
Wheatbelt	Gingin	Gingin, Lancelin, Ledge Point, Seabird, Guilderton	Shire of Gingin Trails Masterplan 2018	✖	✖	✖
Wheatbelt	Narrogin	Narrogin	✖	Walks Trails Masterplan	Pump Track and Mountain Bike Trail Feasibility Study 2019	✖
Wheatbelt	Pingelly	Pingelly	✖	✖	Mountain Bike and Cycling Strategy 2022-2026	✖
Wheatbelt	Cuballing	Cuballing	✖	✖	✖	✖
Wheatbelt	Wandering	Wandering	✖	✖	✖	✖
Wheatbelt	West Arthur	Darkan, Bowelling, Arthur River	✖	✖	✖	✖
Wheatbelt	Williams	Williams	✖	✖	✖	✖
Wheatbelt	Brookton	Brookton	✖	✖	✖	✖

REGION	LGA	TOWNS	TRAILS MASTER PLAN	HIKING MASTER PLAN	MTB MASTER PLAN	OTHER
Peel	Mandurah	Mandurah	Peel Regional Trail Strategy	✖	Perth & Peel Mountain Bike Masterplan	✖
Peel	Boddington	Boddington	Peel Regional Trail Strategy	✖	Perth & Peel Mountain Bike Masterplan	✖
Peel	Murray	Dwellingup	Peel Regional Trail Strategy	✖	Perth & Peel Mountain Bike Masterplan	✖
Peel	Serpentine Jarrahdale	Jarrahdale	Peel Regional Trail Strategy	Mounts Loop Trail Masterplan	Perth & Peel Mountain Bike Masterplan	✖
Peel	Waroona	Waroona	Peel Regional Trail Strategy	✖	Perth & Peel Mountain Bike Masterplan	✖
Outside Study Scope - Relevant	Collie	Collie	Collie River Valley Trails Strategy	✖	✖	Collie Adventure Trails Initiative

11. Strategic Directions

The Concentric Trails Planning Strategic Directions sets out core considerations for Local Governmental Areas and their Councils, land managers, tourism organisations and trail user groups. The check list below helps better plan for appropriate trail development to achieve the right trail(s) in the right place for the right reason at the right time.

11.1   Concentric Planning Framework

In coordination with current and future trail tourism planning processes, the Concentric Circles framework should be reflected upon to offer geographic overview and visitation driver analysis for best planning of trail destinations. The modelling can be used to define certain factors pertinent to a trail destination and how they may guide development priorities.

Regional Locator

Where does a trail destination sit with reference to the core source market(s) – Perth (Perth North / Perth South) – and how do factors such as travel times, and ease of access affect ability to attract visitation?

Proximal Locator

Where does a trail destination sit with reference to other proximal trail destinations? Are there other major, potentially competing trail destinations nearby? Do they vie for the same market? With reflection should a destination choose to grow their trail offering or choose to leverage off an existing co-located destination focusing on other non-trail tourism strengths (activities, accommodation, catering, events)?

Wedge Dispersal Model

Can a destination encourage dispersal by becoming an attractor that complements a nearby major trail destination? What is the attractor, trail or otherwise?

11.2   Trails Planning Process

A trail destination and associated trail development should meet the minimum requirement of integration with broader strategic plans:

- Are the trails or planned trails supported by overarching planning strategies including Regional Trails Masterplans, Trail Masterplans and Tourism Strategies containing trail priorities?
- Is a trail planning pathway defined and guided by existing State-wide strategic trail planning documents?
- Are trails being developed to meet Australian and State trail design standards including the WA Trail Development Series guidelines?
- Are Traditional Owners being partnered with and/or does a trail development have the support and involvement of Traditional Owners and Knowledge Keepers?
- Has the WA Trails Development Series Part A been referenced?

11.3   Regional and LGA coordination

Challenges of trails crossing administrative boundaries need to be addressed and planned for. Cooperation and coordination between land managers and LGAs is critical for the benefit of trail development, management and marketing of trail destinations and community support.

- Does the trail development have the support of all land managers?
- Does the trail development have the support of the relevant Local Government Authority and is it included in LGA planning?
- Are there pathways and organisational structures that support coordination and communication between LGAs to the benefit of the trail development and ongoing management and marketing?

11.4   Connectivity

Trail development should procced according to a core design philosophy of connectivity. Trails should offer visitors and local community the ability to access landscapes easily, logically, with connections to and between townships, trailheads, other trails and attractions.

- Does the trail development link to and between townships (where feasible)?
- Does the trail incorporate loop trails where feasible?
- Does the trail link to other trails and attractions of note?
- Does the trail connect to country in a way that respects Aboriginal cultural heritage and storytelling (used in situ where appropriately identified and approved by Traditional Owners).

11.5   Appropriate development

Any trail development should be appropriate according to the host community, land managers and appealing to the trail user group/s.

- Landscape analysis – is the intended host landscape attractive to the trail recreation market? What are its unique selling points? Does a destination feature landscapes and host attractions that meet market demand and desirability?
- Tenure analysis – what is the feasibility of trail development considered against governance of land parcels, regulations of management, cooperation of land manager/s?
- Experience analysis – does intended trail experience meet target market needs and expectations?
- Community analysis – does the local community support the trail development?
- Traditional Ownership approval – does the trail development have Traditional Owner support and involvement?

11.6   Critical Mass

For a trail network to be classified as a destination (of attraction to visitors from out of region), it requires a baseline quantity of volume, variety and quality. Baselines are contextual to the type of trail, the intended user and their needs and the available landscape features.

- Importance of volume of trails in a travel-to trail destination – are there enough trails (distance)?
- Importance of quality – is the average quality high in terms of experience, desirable features, maintained standards and infrastructure?
- Has the carrying capacity of trail destinations been assessed and will it be ongoing, via a combination of visitor counts, trail condition monitoring, visitor feedback, parking capacity, and resource management? By using these indicators, tourism planners and trail managers can identify when the carrying capacity has been reached and develop strategies to manage visitor use and protect the trails and surrounding environment.

11.7   New markets

The outdoor active recreation space is ever-evolving, where new forms of engagement develop quickly and rise to become significant markets quickly (i.e. trail running is a relatively recent phenomenon but now a major trail market equal to any other).

- Has a destination recognised its potential strengths and attractions according to newly identified markets and/or incorporated facilitation to attract such?
- Potential markets include adaptive MTB, e-MTB, gravel grinding, bike packing, trail running, participatory (non-competitive) events such as challenge walks?

11.8   Dispersal attractors

The Concentric Circle framework identifies not only preferred trail destination development zones. With reference to the Wedge Dispersal model, it also identifies and values adjacent locations of interest for their added value attractions, facilitation services and dispersal motivators. Destinations that do not have capacity or justification for large scale development often remain of value to the broader regional trail tourism offering with local trails offering added activity targets, other activities and attractions such as

water-based recreation, equine tourism, local produce, festivals and events, cultural centres and heritage values increasing overall destination attraction.

- Are local trails of value, volume and quality enough to attract the trail market seeking added value trail experiences?
- What other strengths of attraction does a location feature that may interest trail visitors and encourage extended stay, stop over and dispersal from/between nearby regional trail destinations?
- Events & Festivals? Culture? Heritage? Produce / epicurean? Other outdoor active (paddling, equine, wildflowers, birdwatching, geocaching)? What is of most relevance to the trail visitation audience being targeted?

11.9   Services and facilitation (accommodation and catering)

The ability for a destination to service an intended trail user off trail is often just as critical to a trail network's success or failure to attract visitation. Plans should be made to assess and further develop the hospitality sector.

- Are there enough available and operational services such as accommodation, catering, equipment (i.e. hire) and other services such as tour operators/guides, visitor information (pre-trip and in situ) to ensure a visitor has a seamless experience?
- Is there a workforce in situ with capacity to service the growing inbound tourism market/s?

11.10   Events

A trail network of regional significance should be capable of hosting events as showcase attractors of visitation.

- Is a trail network connected to a township and associated facilities?
- Is there on trail capacity for large event attendance?
- Is there an appropriate event staging location connected to the trails?
- Is there infrastructure in place to cater to event participants in high numbers i.e. car parking, shelter, water, power?
- Is the associated township capable of servicing an event community i.e. accommodation, catering?
- Does the local community support any trail event plans?

12. Strategic Recommendations

12.1   Development Criteria

Any destination seeking support for trail development should meet trail destination development criteria:

- Landscape suitability
- Traditional Owner support (and involvement in development)
- Community support
- Some form of existing trail infrastructure with evidence of moderate use or feasibility study completed for new site development
- Be located not within 1 hour approx. of another similar trail destination i.e. MTB-MTB, and/or if seeking to be a supporting trail destination be located on a logical wedge travel route for trail tourism.
- Supported by existing Regional Trails Masterplan or Regional MTB / Hike Masterplan and/or Regional Tourism Strategy
- References and is guided by WA Trail Development Series Part A
- Financing channels identified for development and management/maintenance ongoing

12.2   Defined Strategic Focus Areas

A strategic focus on primary Mountain Biking trail clusters that are existing, in final phase or mid phase of significant development: Bindoon, York and Dwellingup and associated primary trail network destinations. Consideration given to supporting added-value hubs only where located a minimum of 1-hour (approximately) drive (70-100km) away, and destination meets other development criteria as above.

A focus on existing walk clusters and associated township service centres: Bibbulmun, Jarrahdale-Serpentine

A focus on improving hero linear trails to better serve short trip, day trip and limited overnight experiences, including addressing connectivity with townships and other trail nodes, quality of experience, with a preference for developing cloverleaf, loop, stacked loop / branch trail development.

12.3   Develop quantitative framework for categorising hiking trail destinations

Further to the defined requirements for a Hiking Trail Town, it is recommended to develop quantitative quantitative measures to enable the identification of hike trail destinations as Local, Regional or State/Signature, as per existing mountain bike trail hierarchy guidelines, to better guide investment prioritisation.

12.4   Conduct Full Trail and Capacity Audit

Conduct a more comprehensive trail experience audit of identified trail-relevant LGAs to capture more detailed foundation data (including trails, attraction features and facilitation capacity) to be used in planning and marketing activities moving forward.

12.5   Establish Wheatbelt Trails Working Group

Establish Trails Development Regional Working Group for Wheatbelt Inner covering LGAs with recognised trail destinations and aspirations to foster better inter-LGA coordination.

12.6   Wheatbelt Trails Destination Masterplan

Develop a Wheatbelt Trail Destinations Masterplan (inner north, east and south region focus) to mirror the existing Peel Regional Trails Masterplan.

12.7   Trail Itinerary Development – Wedge Dispersal Model

Develop and promote trail-based itineraries based on short, day trip and overnight trail destinations using Wedge Dispersal Model for priority identification.

12.8   Indigenous Trail Tourism

Identify and invest in opportunities for the increased development of Indigenous cultural attractions and storytelling attached to trail destinations, as appropriately informed and led by relevant Traditional Owners and Knowledge Keepers.

12.9   Coordinate Inter-LGA and Inter-Region Trail Marketing Activity

Develop (or identify) collaborative channels for Wheatbelt and Peel to coordinate cross (intra)regional and inter-LGA trails marketing efforts with a focus on itinerary and diversity marketing.

12.10   Concentric Circle Marketing – Trails WA

Potentially develop trail marketing content campaign based on Concentric Circle Arc via Trails WA channels (trail destination and itinerary development).

12.11   Accommodation Development

Identify and develop accommodation potential and capacities in trail destination townships and transit nodes, especially relevant to Dryandra-Pingelly-Narrogin region. Identify and seek solutions for hospitality and tour workforce accommodation.

12.12   Support Long Distance Adventure Cycling Experiences

Recognise the growth in 'adventure ride' market – requiring less trail development / investment and more conceptual itinerary/route development – by supporting the development of long-distance trail (ride) extensions and new planning, including Bindoon-Toodyay-Northam-Midlands proposal and Dryandra adventure ride zone. Conduct desktop audit of all regional disused railway corridors to identify viable and desirable off road adventure cycling routes / link opportunities between other trails/destinations.

12.13   Long Distance Adventure Cycling Strategy

In support of 10.12, develop a State-Wide Long Distance Adventure Cycling Strategy (Gravel Grind and Bike Packing/MTB Touring) – see NSW Adventure Cycling Strategy example. Reference all current long distance adventure cycling route proposals and disused railway corridor audit recommended.

12.14   Events

Identify the potential to grow or establish new trail-based events to drive visitation including regional series of MTB events with a node in each identified zone (North, East, South) plus gravel grind events organised and digital facilitation challenges. Support (via marketing assistance, grants etc) existing trail running events. Investigate potential for non-competitive walking events.

12.15   Destination and Source Market Zones

Recognise and plan for 1. three-zone destination structure - North, East, South to better inform marketing and information campaigns; and 2. Two-zone source market structure (North and South Perth) and their different engagement dynamic with destination zones to better target marketing efforts (especially digital).

12.16   York Regional Destination Development

Support ongoing development of York MTB Trail Concept Planning with further investigations into upgrading of York walking trails and feasibility of summit trail to reach Regional classification.

12.17   Bindoon Regional Destination Development

Investigate connective development of Bindoon walking trail network to expand current MTB development to better support multi-user visitation base. 1. Identify specific and appropriate loop routes within MTB precinct (on existing green shared use trail plus develop new intra-network alignments that

do not interfere with MTB routes, aiming for total 10-15km of low impact trail). 2. Review, develop and better connect local hiking trail network linking MTB precinct, township and nearby lakes 3. Leverage trail connectivity for adventure cycle / touring market by identifying gravel grind/bike packing routes including support for further development of long-distance MTB Trail Concept (Shire of Chittering Feasibility Study 2023), Bindoon (via Toodyay and Northam) to Midland.

12.18   Dryandra Regional Destination Development

Identify and develop Dryandra Zone including Dryandra Woodlands, Narrogin and Pingelly as an adventure cycling (gravel grind / bike packing) zone, establish best suggested routes/itineraries anchored between Pingelly, Narrogin and Boddington (or Williams/Wandering), encourage support servicing (accommodation, food and beverage, bike hire and servicing, added value activities), explore opportunities to activate Lions Dryandra Woodland Village (cycle-specific accommodation, catering and related events), plug in added value attractions (conservation heritage story, day time Numbat spotting).

12.19   Peel Regional Destination Development

Continue the coordinated trails approach underway in the Peel Region through ongoing implementation and review of Peel Trails Strategy supported by the continuation of Peel Trails Committee that has representation from Peel Alliance, Peel Development Commission, Shire/City's LGA, DLGSC, DBCA.

12.20   Jarrahdale-Serpentine Destination Development

Specific focus on the potential for walking trail development and improvements in the Jarrahdale-Serpentine LGA as a strength / point of difference compared to proximal regions' and other trail destination focus (i.e. Dwellingup, Boddington, Collie, Dryandra are all majorly focused on mountain and adventure riding). Inclusions for review: Mounts Loop Trail, Byford Trail Centre and link to Wungong Regional Park, Mundijong to Jarrahdale Rail Trail, Jarrahdale Oval trail Head. Further review for opportunity to improve Serpentine Falls, Kitty Gorge, Sullivan Rock/Mount Cooke/Darling Range with a view to development of loop walks, connections to/from Bibbulmun and upgraded facilitation and infrastructure.

Finalise Langford Park MTB facility upgrades. Messaging focus on attracting day-use visitors from Perth Metro as alternative destinations to Goat Farm, Kalamunda, Manning Park, Kwinana, Byford.

12.21   Waroona Destination Development

Reinvigorate the development of a Waroona Trails Strategy with prioritisation of Waroona Dams Shared Use Trail linking township to water bodies and further east to connect to Munda Biddi (and Dwellingup / Murray Valley Trails. Look to leverage Perth Metro public transport access to trails via Waroona.

13. Conclusion

This report has drawn on stakeholder feedback, workshops and insights into the characteristics of domestic trail tourism in the Wheatbelt and Peel regions and the profile of outdoor active visitors seeking to experience nature-based attractions within 1-3 hours of metropolitan Perth.

The surrounding region has a wide range of quality trail-based experiences including national parks and significant trail destinations such as Dwellingup. It also hosts numerous destinations seeking to grow their trail-based visitation and invest in trail infrastructure and associated development.

The Concentric Trails analysis provides high-level strategic roadmap to guide this trail destination management and development into the future with a view to improving coordination between regions, LGAs and destinations.

The adoption of a hub and spoke analysis model as outlined by the Concentric Circles approach could be used to consider how to best plan for trail-based experiences and to guide aspiring trail destinations in how to develop trails appropriately: the right trails for the right users, in the right place at the right time. Whilst it seeks to decrease the risk of over-supply of competing trail developments it does not discourage trail infrastructure development in general, and recognises the importance of continued investment in local trails for regional community use, noting such trails also serve purpose of added value attraction and resulting tourism dispersal.

Through the Concentric Circles prism, land managers can better plan how visitors connect from the city to the sub-regions guided by their motivations, behaviours, and expectations. Such a planning framework can become a basis to overlay key experience themes e.g. mountain biking, hiking, trail running and guide how best to plan for and cater to visitation, while also leveraging supporting activities and services.

It also can guide planning priorities by identifying appropriate trail development and where alternative complementary development (i.e. accommodation, services, added value activities) may be preferentially focused upon.

Dwellingup Adventure Trails.
IMAGE: TRC Tourism

The inner Wheatbelt and Peel regions offer significant potential for attracting intrastate trail-based tourism in an era where people are seeking the premium of remoteness, wilderness and nature-based activity. Equally, the establishment of quality trail experiences has the potential to diversify regional economic income, support business and community enterprise development while also serving community liveability and amenity needs.

There are a number of challenges to be faced, not the least being fragmentation of land management and inter-LGA coordination and cooperation across such large areas. This is especially pertinent given trails – and indeed trail visitors – rarely recognise or adhere to the invisible administrative boundaries of local government, which establishes cooperation between organisations and administrators as project-critical when it comes to trail development.

Any future trail development should be undertaken with specific coordination anchored in communication between trail and tourism officers within LGAs, major land managers such as DPAW and state-based administrative agencies. The Trail Development Series should be used as a guiding document and all trail proposal and trail frameworks should be agreed by all relevant stakeholders.

Other challenges are those consistent to any trail development planning: funding, maintenance and management concerns, all queries that must have solutions in place prior to further trail development action.

The Concentric Circles Trails Development study reveals that there have emerged natural epicentres for trail-based visitation centred on Dwellingup (southern zone), York (eastern zone, developing) and Bindoon (northern zone, developing) with a significant skew towards mountain biking development. These destinations are adequately located at sufficient proximal distances that justify ongoing investment in their growth without risk of source market cannibalisation or trail oversupply.

The gap in this spread across Peel and Wheatbelt is located in the Dryandra (south-east) region, however the landscape and existing trail supply does not warrant large scale investment in major (destination-based) mountain biking infrastructure. Rather a collectivisation of attractions and facilitation centres in a zone format – inclusive Dryandra, Pingelly, Narrogin, Cuballing, Wandering and Williams – could be developed to represent a 'destination' with a focus on adventure riding. Some mid-level development of local mountain biking infrastructure (Narrogin and Pingelly) would represent added value drawcards for the destination as would developing appropriate, improved hospitality and event-based drivers. Existing woodland walks and the biodiversity, flora and fauna (including daytime Numbat spotting) add further value to the visitation proposition.

Other trail destinations across the study area – Toodyay, Northam, Boddington, Jarrahdale - warrant ongoing development with a strategic lens of ensuring investment is directed appropriately to strengthen diversification (i.e. a focus on walking trails where landscape permits, or an alternative rider engagement profile such as adventure riding); improve connectivity (to other significant trail destinations); and support trail tourism facilitation (added value events, activities and hospitality offering).

A major gap exists in the storytelling and representation of Aboriginal cultural and heritage linked to trail experiences. The strongest proposition to advance a trail centre with a stronger Indigenous focus in Northam and surrounds, predicated on some mid-level trail development centred on the Bilya Koort Boodja Centre.

The combination of a growth in longer distance adventure riding (gravel grinding, bike packing), relatively lower level of required investment (pending on or off-road sections and gaps in preferred routing), opportunity for mass event capacity building, and connectivity improvements means a focus on investing in adventure riding zone, route, itinerary and facilitation is clearly identified.

The Concentric Circle analysis also makes clear the importance of identifying the trail tourism market and the differences in travel requirements based on being located in the north or south of Perth Metropolitan area. Further, it highlights the challenges of drawing day trip visitors out beyond the significant trail-based offerings of high-quality networks and national parks located within the Perth Metro area and therefore more easily and quickly accessible to that market. This highlights a need to capture and invest in factors of added value, hospitality and facilitation in any destination intending to attract a visitors interested in trail recreation.

Sunset from atop Wongborel / Mount Brown, York, Wheatbelt Region
IMAGE: TRC Tourism

Plan	Term	Contribution
WHEATBELT		
Shire of Beverly Trails Masterplan	2014	Recommends development of mostly short trails including: 1. Town Heritage Trails 2. developing geocaching on existing trails 3. develop (new) Pioneers Trail (County Peak) 4. redeveloping trail network at Avondale Discovery Farm including Avondale Link Trail 5. reinvigorate Mount Dale Circuit (DPAW)
Shire of Northam Trails Masterplan	2022	Vision: The Shire of Northam will be recognised a trails destination with an emphasis on experiences connecting locals and visitors to cultural heritage, environmental values and key destinations. Objectives: • Creating signature trail experiences with a focus on cultural heritage and environmental values. Proposed signature trail experiences for development include the Dorntj Koorliny Trail (improve), Kep Track (improve) and Avon River Trail (long term vision to link Toodyay, Northam and York). • Infill immersive experiences – focus on walking trail running and mountain biking trails wit upgrades. • Implement robust governance – Northam Shire to take lead. • Market and promote experiences on offer. Recommends: • Significant upgrades to Kep Track and Dorntj Koorliny Trail. • Development of (new) Avon River Trail • Upgrades to existing local trails with connectivity links to central Northam • Improve Mt Ommonney to local level trails (MTB/hike/walk) • Develop gravel / adventure ride routes • Develop potential for paddle trails on Avon River sections • Establish Northam BMX Club as trailhead hub for MTB • Investigate Mitchel Ave trail potential (new)
York Shire Trails Masterplan	2019-2028	Outlines a number of recommendations for the development of trails in the Shire of York. Recommends development of trails at • Walwalying/Mt Bakewell • Wongborel/Mt Brown • along the Gogulgar Bilya/Avon River.
York Trail Network Concept	2022	Concept Plan for proposed trail network on Walwalying/Mt Bakewell, Wongborel/Mt Brown and along the Gogulgar Bilya/Avon River.
Shire of Gingin Trails Masterplan	2018	Recommends the development of: • Gingin Town Heritage Trail (upgrade / realignment) • Moore River and Silver Creek Trails (upgrade) • Lancelin Coastal Path Upgrade • Moore River Water Trail Recognises limited scope for significant trail development beyond local significance.
Chittering Trails Network Masterplan	2013-2023	Proposes trail projects offering potential to deliver benefits to the community; recognises the needs and demands of local residents and

Plan	Term	Contribution
		visitors whilst taking advantage of the diverse range of attractive landscapes and vistas on offer. Projects include: • Bindoon Heritage Trail • Blackboy (renamed Djidi Djidi Ridge) Ridge Walk Trail • Carty Reserve Walk Trail • Bindoon MTB Trail Network • Wannamal Heritage Trail
Shire of Chittering Mountain Bike Masterplan	2016	Identifies opportunities within the Shire of Chittering to provide high quality mountain biking experiences for ratepayers, that also have significant new tourism attraction potential. Vision: "Chittering Shire will be a highly regarded mountain biking destination for day trippers from Perth, and will be appreciated by residents and prospective residents for its mountain bike friendly approach and commitment to quality mountain bike trails and facilities." Projects include: • Clune Park • Muchea Dual Slalom Jump & Pump Track • Blackboy (renamed Djidi Djidi Ridge) Ridge MTB • Carty Reserve to Clune Park Family Touring Trail • Wandena Community Bike Park • Wannamal Community Bike Park • Long distance ride route Toodyay-Bald Hill-Avon Valley-Bindoon • Sussex Bend Community Bike Park
Shire of Chittering Long Distance Mountain Bike Feasibility Study	2023	Proposes a long distance off-road cycling trail connecting Bindoon with surrounding regions via Toodyay, Northam to Midland.
Narrogin Walks Trails Masterplan	2019	Focus on built heritage strength / heritage walk trails. Major natural attraction identified as Foxes Lair. • Foxes Lair Trails Upgrade • Railway Dam Trails Upgrade • Gnarojin Trails Upgrade
Narrogin Pumps Track and Mountain Bike Feasibility Study	2019	Study to determine feasibility of Pump and Mountain Bike Trails in Narrogin Shire. Recommends: • Pump track within Gnarojin Trails area • Further development / formalisation of Foxes Lair, the Commonage and Railway Dam for MTB trails • Identification of Dryandra Woodland for MTB trails
Pingelly Mountain Bike & Cycling Strategy	2022-2026	Cycling and Mountain Biking Masterplan for Pingelly. Vision: • Create a place where visitors & locals will choose to cycle Strategies: • Build a Local Cycling Culture • Become the Trails Centre for the Southern Wheatbelt Actions: • Develop 10km mountain bike trails in town centre • Build pump / skills track and skate park • Build 'rail trail' style connecting trail along rail and pipe corridors north/south (Brookton, Narrogin)

Plan	Term	Contribution
Avon Central Coast Regional Cycling Strategy	2050	In collaboration with the Shires of Beverley, Chittering, Dandaragan, Gingin, Northam, Toodyay and York, the Department of Transport is developing a Regional Cycling Strategy for the Avon and Central Coast region. The Avon Central Coast 2050 Strategy will set out a long-term vision for cycling across the region, including an aspirational network covering key townsites and interregional connections.
PEEL		
Peel Regional Trails Strategy	2019	Strategic direction for trails in the Peel Region. Outlined Jarrahdale as having potential to become a Trails Town with a focus on equestrian trails. Identified a number of hike trail opportunities including a 'Mounts Trail' linking Jarrahdale to the Monadnocks. Includes Regional and Local Trail Strategies for : 1. Mandurah 2. Boddington 3. Murray 4. Serpentine 5. Waroona
Perth & Peel Mountain Bike Master Plan	2017	The Master Plan proposes building in the current supply across 24 sites in the region with sustainable high quality mountain bike facilities to deliver nationally and regionally significant mountain bike destinations in the Perth Hills Precinct, Dwellingup, Wungong, Swan Valley and Manchep plus Jarrahdale.
Shire of Serpentine Jarrahdale Tourism Strategy	2018-2023	The goal of the strategy is to provide the framework to transform Serpentine Jarrahdale into a high-ranking day-trip and holiday destination. The plan identifies 8 key areas of focus: 1. Branding and wayfinding 2. Expansion of the region's trail network 3. Leveraging agritourism to enhance food and wine offering 4. Equine tourism 5. Activating the region's natural cultural and historic attractions 6. Adventure tourism 7. Increasing and diversifying accommodation options 8. Regular and occasional events
Shire of Serpentine Jarrahdale Local Trail Plan	2019	Identifies trail development opportunities with a view to the establishment of Jarrahdale as a Trail Town.
Shire of Serpentine Jarrahdale Cycling and Walking Plan	2020	Sets out an interim and long term aspirational walking and cycling network for the Shire and includes an implementation program for individual projects that will support the realisation of the Plan's vision and objectives.
Mounts Loop Trail Masterplan	2021	Plan to link the town of Jarrahdale to the Bibbulmun Track . The Mounts Loop, placed within the Jarrahdale State Forest and Monadnocks Conservation Reserve, would traverse the highest points on the Darling Scarp through open marri-jarrah forests and granite outcrops. "A trail linking Jarrahdale to the mounts (specifically Mount Randall, Mount Cuthbert and Mount Vincent) will add significantly to the trails offering in the region, and help to make Jarrahdale a regionally significant bushwalking destination."
Jarrahdale Trail Town Draft Business Case	2021	A strategic document for the sustainable development of trail based tourism in the Shire by seeking to qualify for Trails Town accreditation.