BINDOON
Mountain Bike and Adventure Park

Feasibility Study for the Shire of Chittering June 2019

Breakaway
TOURISM PTY LTD

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The purpose of this Report is to provide the Proponents with information relating to the development opportunity and feasibility described in the Report. The Consultant has prepared the Report, based on its experience, knowledge and networks related to tourism, recreation and leisure industry developments and information obtained from consultation with the mountain bike industry and community, associated sport and recreational sectors, product and service providers, government agencies, published materials and the general public.

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Section 1:

Executive Summary
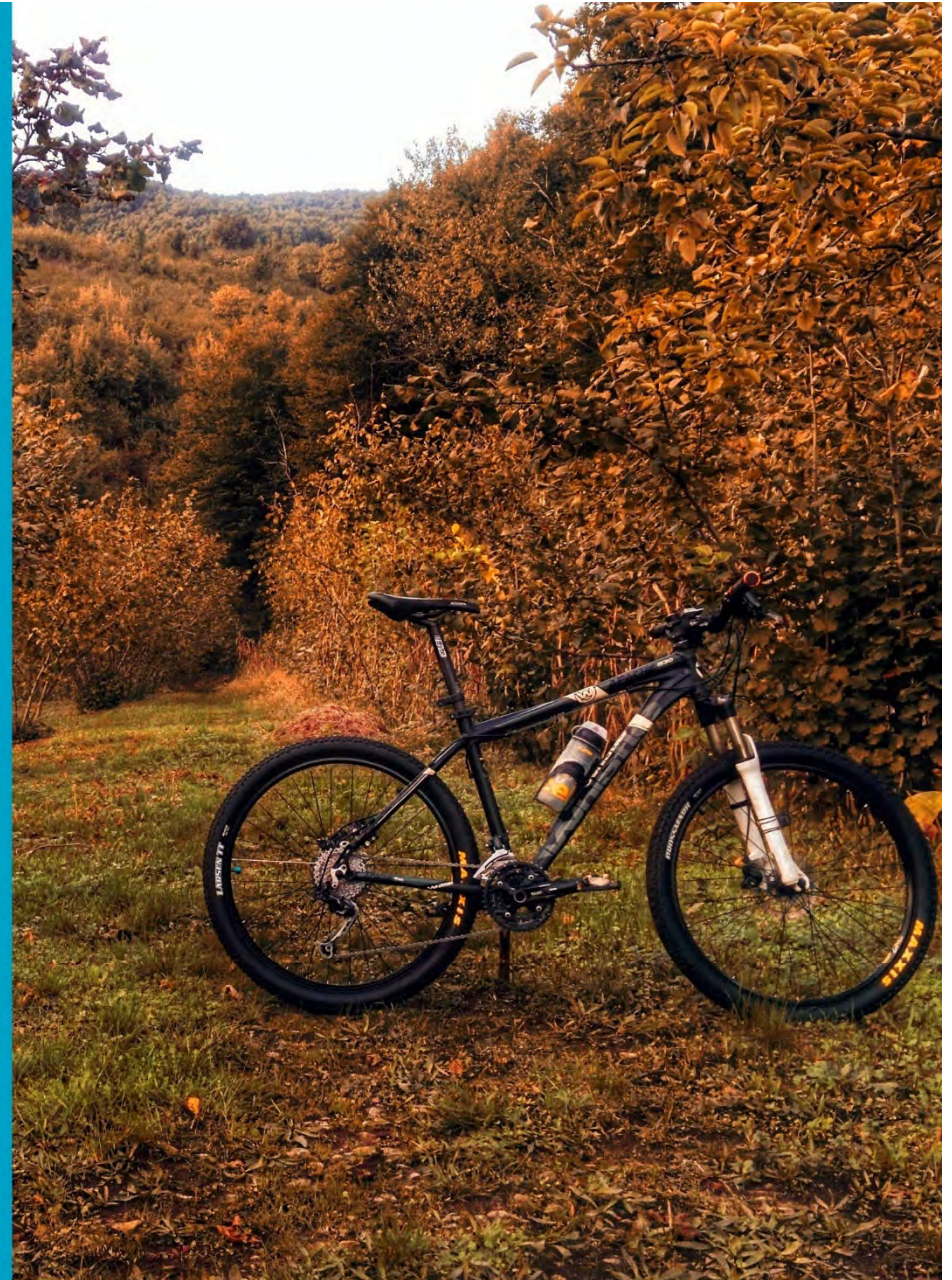
1. Executive Summary

This Feasibility Study has been commissioned to assess the opportunity, which has been identified by the Shire of Chittering, to develop a mountain bike and adventure park/facility in the location of Bindoon.

The Shire is looking use this potential development as a platform to generate increased visitation and economic contribution through the delivery of a major tourism, sport and recreation attraction.

Why a Mountain Bike Park?

It has been widely reported in recent years that mountain biking is one of the world's fastest growing recreational, sport and tourism activities and Western Australia is following this global trend.

Following research and data collection mechanisms for the sport and recreational activity, a myriad of mountain bike trail strategies, plans, projects and guidelines has since been developed by the mountain biking sector, industry organisations, Local Government Authorities and State Government Agencies in response to a rapidly growing demand for mountain bike trails across Australia.

Consultation with WestCycle, the peak industry body for cycling in Western Australia identified the development of mountain bike trails in Perth and surrounds are a priority as the demand for sanctioned, quality mountain bike trails for the Perth metropolitan population far outweighs the supply.

The opportunity to capture the interest of a growing consumer market of mountain bikers of all ages with a high quality, world-class mountain bike attraction may become the 'hero' product within a broader tourism and recreation strategy for the Shire of Chittering.

Due to the planning and development of mountain bike trail networks, hubs and trail towns in State Forests and National Parks in the south west of Western Australia such as Dwellingup, Collie and Nannup, an opportunity to provide a unique point of difference with a dedicated mountain bike park, with collocated adventure activities all at one convenient location, may be capitalised on.

With the benefit of close proximity to the major population base of Perth, the activation of a unique, world-class mountain bike and adventure park attraction in Bindoon has the potential to be of regional, state and national tourism significance.

Why Consider Bindoon as a Location?

For a mountain bike trail network to be successful, one of the key requirements is a suitable landform with relevant topography. The proposed site at Lot 3874, Bindoon aligns with all the necessary key features to enable quality design conceptualisation.

- The primary site is large (over 89 hectares) to allow for a variety of activities and features to be developed plus, should demand dictate, the size of the site can accommodate future expansion requirements

- The site has great topography, which lends to sustainable development principles being applied. The variations in landforms also provides the opportunity to design trails which suit all skill levels

- The site has great elevation, a key factor in creating a trail network which can facilitate a range of high-end rider experiences

- The proximity of the site to the Bindoon town centre (less than 1km), offers an opportunity for local business stimulation

- Access to Bindoon from the major metropolitan base of Perth is less

than an hour's drive away, soon to be reduced to 45 minutes with the opening of NorthLink WA

Supporting the above attributes is the existing services and infrastructure framework which can support and grow with any potential visitation increase.

Many mountain bike trail networks are somewhat isolated from the closest town centre, which largely dictates the need for those styles of development to contain all services in house adding to resources required and cost of infrastructure.

Because of the short distance between the subject site and Bindoon town centre, minimal duplication of services will be required moreover, co-location initiatives can be structured to maximise benefits for the local community and businesses.

Some key design objectives to maximise the site benefits have been established, such as:

- Utilise the natural contours of the site to minimise construction activity

- Minimise clearing and vegetation removal

- Implement a forward-thinking design to ensure ongoing maintenance and sustainability can be better managed

- Create rider experiences for all skill levels

- Consider the consultation and survey feedback to ensure the design concept is market relevant

- Create easy trail linkages for safe and measured rider skill progression

- Install comfortable and inviting infrastructure to encourage non-riders to visit

- Develop a product which can stimulate increased tourism in the area

- Use the natural assets of the area as a marketable product to enhance the economic flow from increased visitation

- Future proof the design to keep up with market trends

- Stage the design to align with funding allocations and to offer marketable rider experiences

- Take advantage of the proximity to existing infrastructure and the proximity to the Bindoon town centre

- Create sustainable revenue and add-on revenue streams

- Include additional onsite activities such as an adventure park to create a development which is appealing to a broader market segment

A major advantage of the Lot 3874 site in Bindoon is that it is not State Forest or National Park land managed by the Department of Biodiversity, Conservation and Attractions thus avoiding potential restrictions, consultation requirements, licencing, Approvals, extensive timelines and red tape to commence development.

Are There Any Constraints or Issues?

Most developments have constraints or issues which need to be assessed and countered if the project is deemed worthy of pursuing. The key issues and constraints for this proposed development include:

- Land Acquisition: The subject site is privately owned. Additional to the key subject site there is another portion of land which has been included in the preferred design option, this is under the same private ownership. Preliminary discussions have indicated a desire from the land holders to sell, however the two valuations that have been completed to date have a variance upwards of $400k. This needs to

be further reviewed.

- Access to the site: Creating an efficient access and entry statement just using the subject site is difficult. To counter this, the initial design concept incorporates a portion of the land to the west of the subject site. This land has already been identified for future caravan park development, however there are a range of operational and market segment synergies which would benefit both developments and should be considered.

- Funding: With land acquisition and construction/roll out costs, funding needs to be thoroughly reviewed. The need for high capital input in Stage 1, will need comprehensive modelling to ensure the desired financial metrics for the Shire can be achieved.

- Operating the Facility: Operating the proposed development will require a level of competencies which come from industry experience. The resources are available however it would take some finessing to establish a well-resourced operating model. Owing to this, lease options to hand operations to a qualified management team is also worth reviewing.

- Planning and Approvals: At this point no intensive assessment of issues such as environmental, flora and fauna and other planning detail have been undertaken. A desktop audit and consideration of these issues has been completed, with no red flags to date, however detailed reporting will need to be implemented to obtain all required Approvals.

Can the Development Generate a Return on Investment?

Assessing the viability of the proposed Bindoon Mountain Bike and Adventure Park development requires a cautious approach and requires a recognition of the veracity of the projected financial outcomes.

This is because the critical path to establish accurate inputs to any form of financial modelling or projecting of this proposed development, is laden with assumption-based inputs.

This is due to the variances between the initial design concept which has been completed for this report and the actual detailed final design which would need to be undertaken should the project be considered a go forward option.

These vagaries are mostly due to the 'unknowns' of the subject site topography, such as soil conditions, actual trail formations, vegetation density, natural drainage, flora and fauna assessments, bushfire assessments etc.

None of these studies, investigations and reporting have yet been undertaken, due to the 'proposal' nature of this initial Feasibility Study, furthermore such assessments and reports would be costly and potentially a large sunk cost should the development not proceed. A more measured approach and methodology as to assessing the broader benefits of the development has been suggested as part of this report.

In acknowledging the above information, there are however indications that a well-developed, operated and marketed mountain bike and adventure park facility can provide turnover levels which could translate to an attractive ROI outcome.

Using inputs based on similar facilities in Western Australia, it is estimated annual mountain biking user numbers for the proposed development to be 17,200, which then by extrapolating out using an average fee payment per person, results in an estimated annual turnover figure of $619k. The financial section of this Report drills down further into the metrics and assumptions used.

As previously detailed, the overall design, trail systems, value add features

and operational processes for the proposed Bindoon Mountain Bike and Adventure Park development are conceptual only.

The development costing inputs have been derived from rates provided by industry professionals and other industry-based assumptions. To provide some context to what the costings represent, the overall design concept has been aimed at providing a benchmark or "hero" mountain bike and adventure park facility, with additional onsite activity options included to diversify and broaden the market segment capture for year-round visitation.

Unique inclusions such a highly regarded surface uplift and an adventure/obstacle park have been put forward as part of this initial concept phase, from which the benefits of increase DevEx cost vs revenue upside, can be reviewed and assessed.

It has been recommended that a development such as this, where demand is based on projections only, be staged to ensure a slow capital scenario can be minimised. Staging detail and the underpinning benefits and methodology around the staging is highlighted in [Section 23: Financial Planning and Analysis, Construction Cost Estimates], of this Report.

All-inclusive estimated construction costings for the 3 Stage Design Concept are as follows:

> **Stage 1: $2,357,600**
>
> **Stage 2: $547,000**
>
> **Stage 3: $183,500**

Stage 1 requires a large upfront capital input, however justifications for this and the potential benefits can be reviewed in [Section 17: Design Concept, Design Concept Features] of this Report.

In isolation, the development costs may seem unappealing. It is important though to factor in:

- The conceptual nature of the design

- If/where the design can be pared back to reduce costs

- Access to grants and other funding opportunities [see Section 5: Situation Analysis, Grants and Funding Assistance]

- Broader economic benefits to the Shire of Chittering [see Section 16: Economic Contribution Overview, Economic Impact]

- Broader benefits of having a marquee tourism development from which other tourism activity can be stimulated

Creating a 'Hero' Tourism Product

Tourism is defined as *"An industry that is important for the benefits it brings and due to its role as a commercial activity it creates demand and growth for many more industries. Tourism not only contributes towards more economic activities but also generates more employment, revenues and plays a significant role in development."*

Existing mountain biking participation and continued growth is a known, and is supported by a plethora of master planning, forecasting and studies all undertaken by a range of Government agencies and private commercial entities alike, to ensure that the supply of quality trail developments is able to keep up with the increasing demand in Western Australia, nationally and internationally.

The current Shire of Chittering broader tourism landscape can be improved upon. The Shire of Chittering, via a strong forward-thinking mindset from Shire officers, is positioned to capitalise on a burgeoning adventure sports market, by simply taking advantage of the natural land formations which are proximal to the town of Bindoon.

By identifying and considering the subject site as a potential mountain bike

and adventure park facility, the Shire may be able to use the development as a platform from which a range of other tourism activity can be developed.

Refer to this link for an example of what mountain bike developments can achieve:

Wheels of progress: What happens when a rural town becomes the mountain bike capital of Australia?

www.abc.net.au/news/2017-12-26/mountain-bike-trails-driving-major-change-in-derby/9276384.

It is accepted that a well-designed, operated and marketed mountain bike and adventure park facility generates strong user throughput and it is also recognised that the current mountain biking landscape has a level of demand which outweighs the availability of quality riding experiences, in particular within short proximity to the major population centre of Perth.

Should the Shire of Chittering consider this proposed development as a go forward option, it would be recommended the design, features, secondary activities and operational processes all exceed benchmark levels, aimed at creating a 'hero' tourism product for Western Australia which can define the region as a 'must visit' destination and aspirational tourism location for adventure experiences.

Additional to the proposed mountain bike and adventure park development, the Shire of Chittering has other tourism initiatives which can be rolled out and implemented.

Some of these opportunities have laid dormant because of the risk associated with visitation. The robust mountain bike scene could be the catalyst to underpin an increase in visitation and promote confidence for other commercial operations to piggy-back on to this upside.

Furthermore, a robust mountain bike and adventure park throughput would

likely require an increase in the provision of services and infrastructure to ensure the needs of increased visitor numbers are supported by a well-serviced tourism landscape.

This ethos is absolutely essential to sustain the integrity of a proposed Bindoon Mountain Bike and Adventure Park brand.

Goal: To be recognised as 'Best New Tourism Business' at the Western Australian and Australian Tourism Awards!

* This category of the annual Australian Tourism Awards recognises new tourism businesses that have commenced trading, visitation or service delivery during the qualifying period. This award recognises excellence in the planning and development of new tourism infrastructure and/or services in Australia.

Where to From Here?

The development is worthy of further assessment. Irrespective of the anecdotal nature surrounding user numbers, revenue generation, development costing etc, the acknowledged potential of far-reaching benefits for this type of development must dictate a desire to seek further validation that the project is worthy. Similar to the way coastal locations capitalise on their natural assets, the ideally located escarpment in Bindoon should also be part of a strategic vision for the area.

It is recommended that by using a critical path methodology, the Shire of Chittering apply relevant resources to plan out and deliver a framework, which consists of various 'Go' or 'No-Go' decision points.

The decision points will revolve around some of the key issues detailed previously which all funnel into a 'Project Worthy' or 'Project not Worthy'

final assessment.

Establishing a Steering Committee or similar can deliver the required outcomes and engage services of credentialed industry specialists to ensure the decision points can be assessed and reviewed accurately.

Section 2:

Consultation and Reference Data
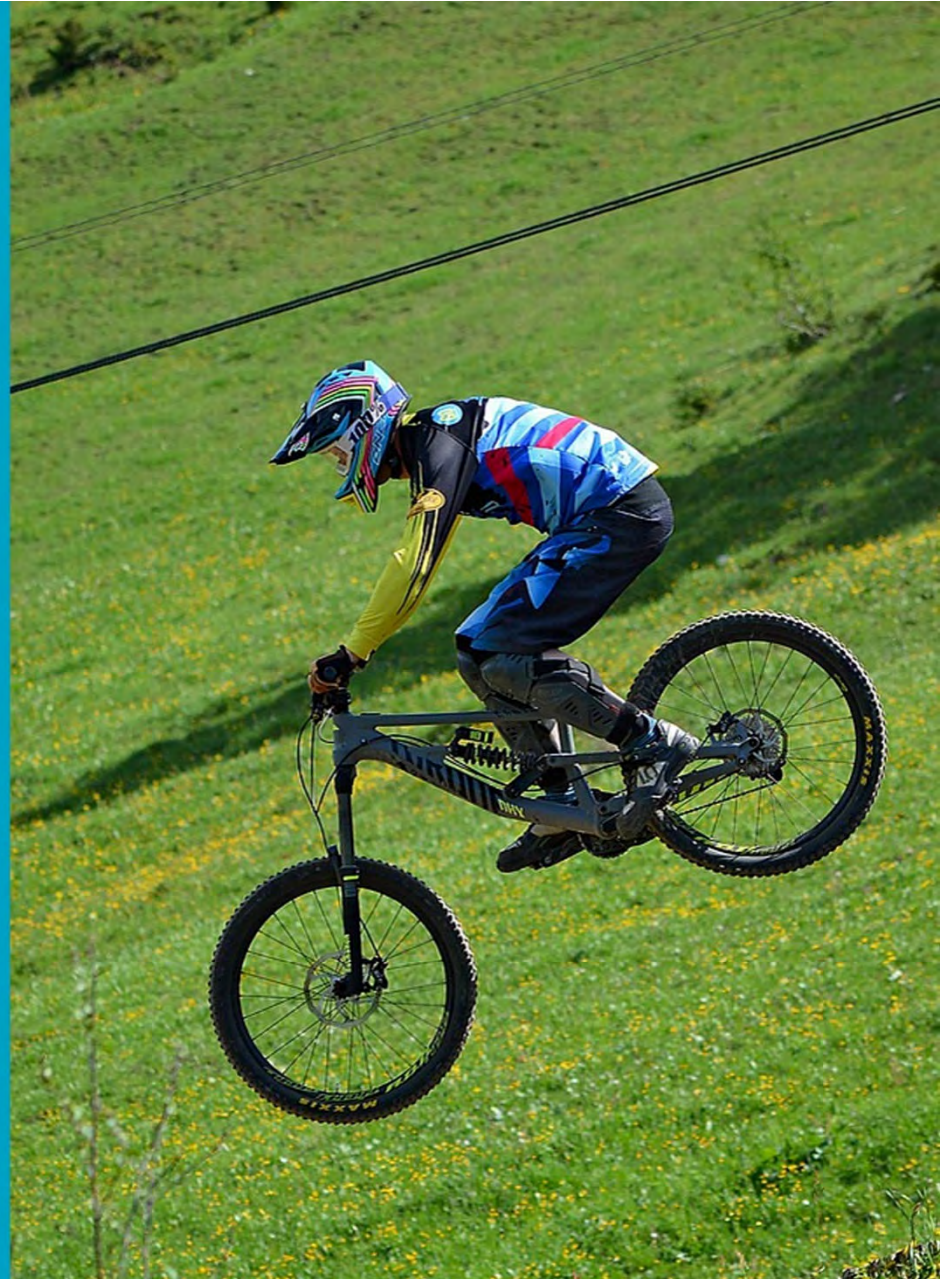
2. Consultation and Reference Data

A 'Proposed Bindoon Mountain Bike Park" public consultation survey was undertaken between the 9th and 30th April 2019.

Full analysis of survey outcomes provided in **Section 6: Project Consumer Survey Analysis**.

Survey Distribution Group 1: Stakeholders

Circulation: 330

A survey was shared with 330 representatives of the following identified Shire of Chittering businesses, Government departments and mountain bike, sport, outdoor recreation and tourism related agencies.

See Attachment 1: Stakeholder Database

Survey Distribution Group 2: Schools

Circulation: 1,189

The survey was sent to State, Catholic and Independent primary and secondary schools in the Perth Metropolitan including schools considered local to Bindoon for recreation and excursion activities.

See Electronic Attachment 1: Schools Contact List

Survey Distribution Group 3: Social Media

The survey was also distributed via Breakaway Tourism's Instagram, Facebook and LinkedIn channels, then further circulated by the following interested parties.

Breakaway Instagram Reach (5,067 people); Impressions (7,728); Likes (296)

Breakaway Facebook Reach (11,621 people); Engagements (1,140)

Breakaway LinkedIn* Views (637) **Michelle Sidebottom LinkedIn page*

Social Media Survey Distributors

- Visit Chittering
- Chittering Visitor Centre & Post Office
- Mountain Bike Australia
- WestCycle
- WA Mountain Biking Association
- Bicycling WA
- Outdoors WA
- Trails WA
- Department of Local Government, Sport and Cultural Industries – Wheatbelt

- Clubs WA
- Moore River Region
- Mountain Bike WA
- WA 4WD Association
- Kalamunda Mountain Bike Community
- Kalamunda Mountain Bike Collective
- Southern Hills Mountain Bikers
- Perth Mountain Bike Club
- Huck to Flat

Table 1: Social media survey distributors

Interviews & Consultation Group 4: Mountain Bike Sector

Interviews and consultation was conducted via a range of communication methods including face to face; teleconference; and email correspondence.

Interviewees included a selection of mountain bike sector-related stakeholders (State and National), and were chosen for their capacity to provide further research materials and specialist industry/agency insights.

Stakeholder Consultation

- Shire of Chittering
- Chittering Tourist Association & Visitor Centre [Amy McCauliffe]
- Mountain Bike Australia [Denise Cox]
- Outdoors WA [Jamie Bennett]
- WestCycle; and WA Mountain Biking Association - WAMBA [Matt Fulton]
- Wheatbelt Development Commission [Emily Comber]
- Jump and Pump Nation, and Trail Design [Ian Humphrey]
- Department of Local Government, Sport & Cultural Industries – Sport & Recreation / Trails WA [Steve Bennett]
- Forest Edge Recreation Camp [Graeme Watson]

- Perth Trail Series [Melina Mellino]
- Tourism WA [Renata Lowe]
- Three Chillies Trail Design [Paul Neave]
- Rock and Roll Mountain Biking [Mark Wardle]
- Koya Aboriginal Corporation – Aboriginal Nature Trekz [Quinton Tucker]
- Peel Regional Trails Strategy Presentation – Common Ground [David Willcox]
- Wavecrest Tours [Rick Besso]
- Caravan Industry Association of WA [Craig Kenyon]
- Orienteering WA [Hadrien Devillepoix]

Table 2: Stakeholder consultation list

Research, Guidelines and Data Collection

Key research, guidelines and statistical data were sourced throughout the consultation and research phase of this Study from key government; mountain biking; cycling; trails; tourism; outdoor recreation; and sporting-related agencies and stakeholders.

Strategic plans, reports and audits previously developed by (or for) the Shire of Chittering have also been used as significant reference data for this Study to avoid duplication of effort and unnecessary consultancy service expenses for the Project owner.
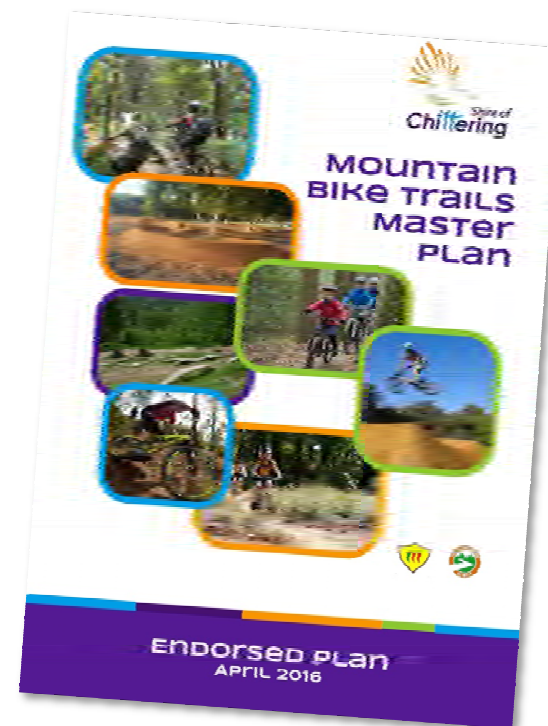
Figure 1: Shire of Chittering Mountain Bike Trails Master Plan

Shire of Chittering

- **Chittering Visitor Centre Strategic Plan 2016-2019**
- **Shire of Chittering Audit Series**:
  - Accommodation Capture – Chittering
  - Assets and Services of Chittering
  - All Projects Chittering (tourism-related projects)
  - What's Working / Not Working in Chittering
- **Shire of Chittering Mountain Bike Trails Master Plan**
- **Shire of Chittering Sport & Recreation Plan 2012-2022**
- **Shire of Chittering Strategic Community Plan 2017-2027**
- **Shire of Chittering Trails Network Master Plan 2013-2023**
- **Bindoon Deviation 'for Heavy Haulage Vehicles' Strategy 2017**

Regional

- **City of Albany Trails Hub Strategy 2015-2025[City of Albany]**
- **Northern Growth Alliance Tourism Strategy** [Wheatbelt Development Commission]
- **Perth & Peel Mountain Bike Master Plan** [WestCycle]
- **Regional Cycling Strategies** [WA Department of Transport]
- **Shire of York Trails Strategy 2019-2028** [Shire of York]
- **South West Mountain Bike Master Plan** [WestCycle]
- **Wheatbelt Blueprint** [Wheatbelt Development Commission]

State

- **Department of Sport and Recreation Strategic Plan 2016-2018** [WA Department of Local Government, Sport and Cultural Industries]
- **DoT Long Term Cycle Network for WA** [WA Department of Transport]
- **Our Bike Path 2014-2020** [WestCycle]
- **Outdoor Education and Recreation Activities Policy** [WA Department of Education]
- **Outdoors WA Annual Report 2018 & The Great Outdoors** [Outdoors WA]

- **Strategic Directions for the WA Sport & Recreation Industry 2016-2020** [WA Department of Local Government, Sport and Cultural Industries]
- **The Business of Trails 2017** [Kerstin Stender, Edith Cowan University]
- **Two Year Action Plan for Tourism Western Australia 2018-2019** [Tourism WA]
- **WA Cycle Tourism Strategy** [WestCycle]
- **WA Mountain Bike Management Guidelines** [WA Department of Local Government, Sport and Cultural Industries; WestCycle; West Australian Mountain Bike Association]
- **WA Mountain Bike Strategy 2015-2020** [WestCycle]
- **Western Australian Adventure Activity Standard – Mountain Biking** [Adventure Activity Standards WA]
- **Western Australian Bicycle Network Plan Update 2017-2018** [WA Department of Transport]
- **Western Australian Cycling High Performance Strategic Plan** [WestCycle]
- **Western Australian Strategic Trails Blueprint 2017-2021** [Trails Reference Group, TRC Tourism]

Interstate

- **Guidelines for the Planning, Design, Construction and Maintenance of Recreational Trails in South Australia** [Recreation South Australia]
- **Guidelines for Trail Planning, Design and Management** [Victorian Local Government Authorities]
- **Queensland Mountain Bike Strategy 2018** [Mountain Bike Australia]

National

- **Australian Adaptive Mountain Biking Guidelines** [Break the Boundary; Mountain Bike Australia; Queensland Government]
- **Australian Mountain Bike Trail Guidelines 2019** [Mountain Bike Australia]
- **IMBA Australia Trail Difficulty Rating System v2.0, 2014** [Australia - International Mountain Bicycling Association]
- **Mountain Bikers Code of Conduct** [Mountain Bike Australia]

International

- **IMBA Guidelines for a Quality Trail Experience - Mountain Bike Trail Guidelines 2017** [International Mountain Bicycling Association, USA]
- **Mountain Bike Trail Impact Review 2019** [Single Tracks, USA]

Mountain Biking E-publications, E-newsletters and Apps

- Australian Leisure Management
- Breaking the Boundary
- Flow Mountain Bike
- International Mountain Bicycling Association
- Mountain Biking Australia Magazine and App
- Single Tracks
- TrailFork
- Trails WA

Data

- Australian Bureau Statistics
- Australian Sports Commission
- Bureau of Meteorology
- Curriculum Standards Authority of WA
- Destination Perth Regional Tourism Organisation
- Main Roads WA
- Real Estate Industry WA
- Service Skills Australia
- Tourism Australia
- Tourism WA
- WA Indigenous Tourism Operators Council

Table 3: Research, guidelines and data collection list

Section 3:

Project Overview

3. Project Overview

Project Methodology

The Shire of Chittering is exploring the option of purchasing 89 hectares of land adjacent to the Bindoon townsite on which to develop a mountain bike facility.

This Feasibility Study aims to review a proposed Mountain Bike Park in the town as it relates to Bindoon and the Shire of Chittering's triple bottom line (social, economic, and environmental).

Planning and Design Context

The planning and design of the proposed Bindoon Mountain Bike and Adventure Park concept has been undertaken by Breakaway Tourism in partnership with mountain bike trail specialists Three Chillies Trail Design.

The design has been aimed at providing a 'Hero' mountain biking tourism product to facilitate an increase in visitation and economic contribution the Shire of Chittering and to stimulate further tourism and employment opportunities for local residents.

Project Vision and Mission

'Red Hill' or 'Bindoon Hill' (Lot 3874) is a large hill overlooking the town of Bindoon with spectacular views across lakes, orchards and the townsite itself. It occupies an area of 89Ha a few hundred metres to the east of Bindoon and is currently privately owned.

The Shire of Chittering is exploring the option of purchasing the land to develop a mountain bike facility (including the possibility of coupling with another adventure tourism operation) with the desire that it will assist with further developing Bindoon as a destination for mountain biking, and tourism generally, creating an enhanced sustainable economy in the area.

In order to secure and strengthen the economy of the local community after a proposed Bindoon bypass of the Great Northern Highway, the Shire of Chittering has been working on a number of integrated strategies which may help to provide for an enhanced economy and an increase in local job opportunities. The Shire has therefore been developing plans which provide for both housing diversity, alternative accommodation, tourist infrastructure and a range of outdoor and adventure-based activities which create Bindoon as a destination, not just as a place for people to travel through.

For example, The Shire of Chittering has recently completed feasibility studies on both a Caravan Park and a lifestyle Village at the base of 'Bindoon Hill', finding them both to be positive for the community and the local economy.

The Bindoon Bypass is part of the overall upgrade of the Great Northern Highway from Muchea to Wubin. Three major arterial transport links (Brand Highway, Great Northern Highway and NorthLink WA / Tonkin Highway) will intersect at the site of the 1,100-hectare Muchea Industrial Park.

The bypass presents both benefits and challenges for the town of Bindoon; improvements to road safety and amenity on the one hand and potential negative impacts for local businesses on the other due to reduced traffic throughput.

Council and its community have as a consequence over recent years worked on a Bindoon Deviation Strategy, which is aimed at mitigating any resultant negative impacts on the local community.

VISION:

Identified in the Shire of Chittering's 'Mountain Bike Trails Master Plan' launched in 2016

'By 2020 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'

Section 4:

Project Environment

4. Project Environment

Project environment analysis for a proposed mountain bike and adventure park in Bindoon.

Figure 2: Shire Chittering and Visit Chittering logos

Project Proponent:	Shire of Chittering
Organisation Type:	Local Government Authority
Phone:	+61 (08) 9576 4600
General Email:	chatter@chittering.wa.gov.au
Website:	www.chittering.wa.gov.au
Street Address:	6177 Great Northern Highway, Bindoon WA 6502
Postal Address:	PO Box 70, Bindoon WA 6502
ABN:	48 445 751 800

The Shire of Chittering has an opportunity to procure a privately-owned parcel of land at Lot 3874 in Bindoon for the purposes of developing Bindoon and the broader Shire of Chittering as a world-class adventure, recreation and nature-based tourism destination in Western Australia.
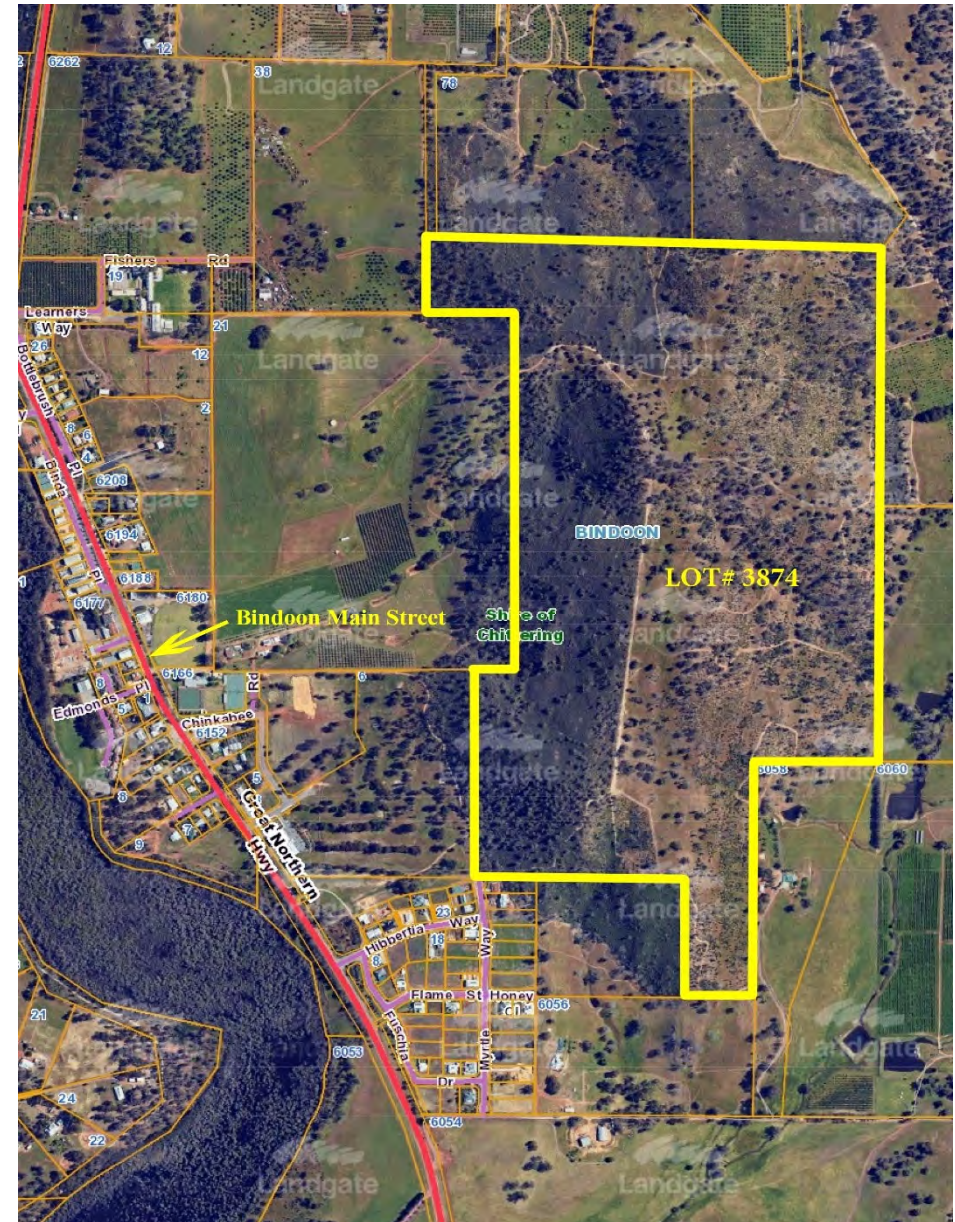
Figure 3: Site Map, Lot 3874, Bindoon

Proposed Project Location

Site Address: Lot #3874, Bindoon WA 6502

GPS Coordinates: Lat: 31.38° S | Long: 116.11° E

Lot Type: Freehold Land

Parcel Identification Number (PIN): 567877

Lot Area (m²): 894,926 m²

Lot Area (Ha): 89.49 Hectares

Region Scheme (RS): No Region Scheme found

Local Planning Scheme (LPS): Shire of Chittering Scheme No. 6 Agricultural Resource (No R-code)

Permitted Use: Permitted uses within this zoning classification include: Agriculture - Extensive; Agriculture – Intensive; Agro Forestry; Arts & Crafts Centre; Cemetery; Civic Use; Family Day Care; Single House; and Stable

State Planning Policies (SPP): Fire Prone Area *(site is located within an identified Bushfire Prone Area. This dictates that a Bushfire Management Plan will need to be established as part of any development)*

Services: Property is fully serviced, with the exception of reticulated sewer

Contamination Register: Property is not currently listed on the Department of Water and Environmental Regulations Register

Development Assessment Panel (DAP): No DAP Applications found within 150m

Structure Plans: No Structure Plans found

Layout Plans: No Layout Plans found

Aboriginal Heritage: No Aboriginal Sites or Other Heritage Places found

Historical Heritage: No Historic Heritage Places (Heritage Council) found

No Historic Heritage Municipal Inventory Places (LGA) found

Shire of Chittering Population: 5,472 (ABS, Census 2016)

Shire of Chittering Townsites: Bindoon, Muchea and Wannamal

Shire of Chittering Localities: Mooliabeenee, Upper Chittering and Lower Chittering

Surrounding Shires: Gingin, Victoria Plains, Toodyay and Swan

Electorates: Moore (State); Pearce (Federal)

Development Commission: Wheatbelt Development Commission

Tourism Region: Destination Perth

Tourism Sub-Region Destination: Chittering Valley

The name 'Bindoon' is thought to be Aboriginal in origin and to mean "place where the yams grow"
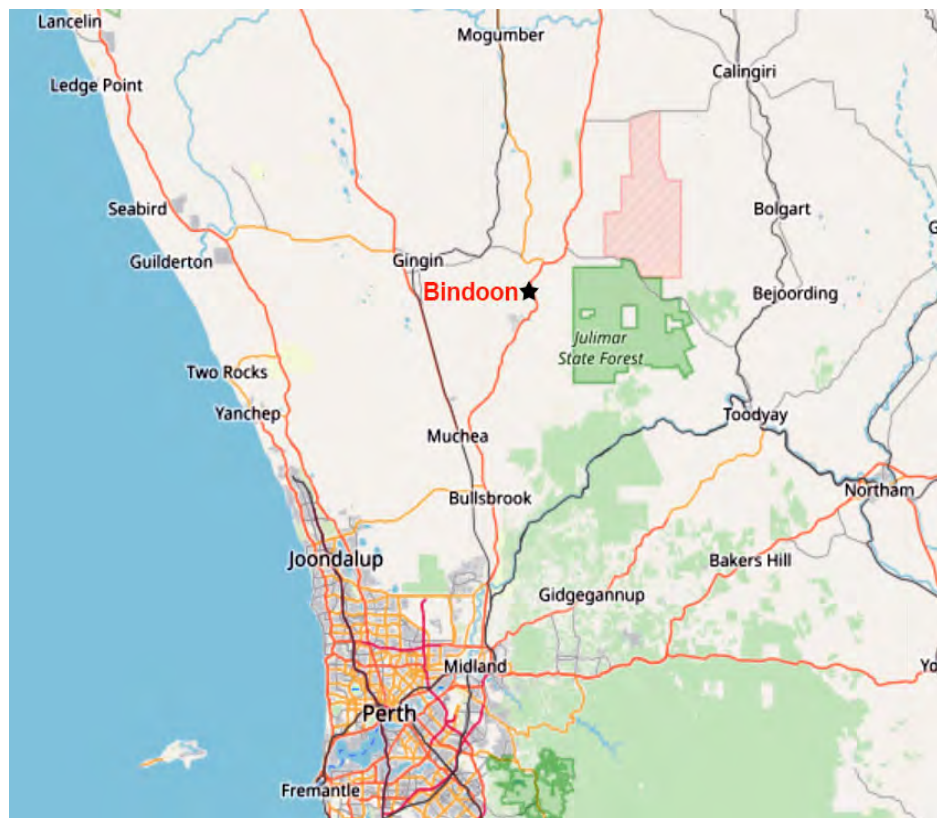
Figure 4: Perth Metro to Bindoon Map
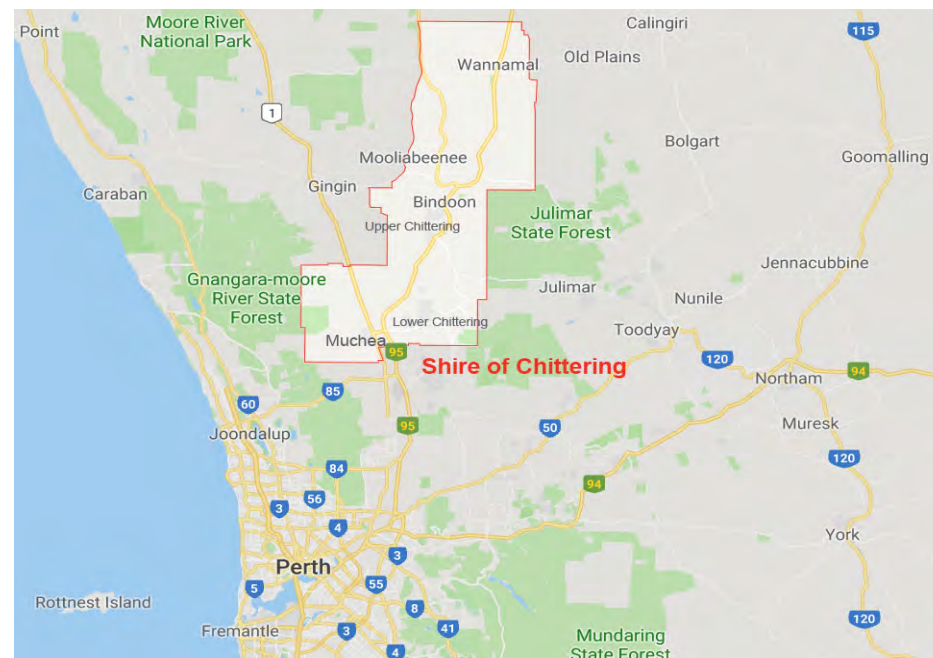
Figure 5: Shire of Chittering map and localities

Location Distance Chart	
Perth CBD - Bindoon	83km (1 hr 10 min)
Yanchep - Bindoon	78km (60 min)
Midland - Bindoon	66km (55 min)
Joondalup - Bindoon	65km (54 min)
Ellenbrook - Bindoon	57km (48 min)
Swan Valley Tourist Region - Bindoon	55km (40 min)
Muchea - Bindoon	29km (26min)
Gingin - Bindoon	28km (22min)

Table 4: Bindoon distance chart

As a tourism destination, Chittering Valley is identified and promoted as 'rich in food, farms, wine and beautiful landscapes'

Figure 6: Destination Perth website - Chittering Valley banner

From a Western Australian tourism region perspective, as identified by Destination Perth (tourism region marketing agency) and Tourism Western Australia (State marketing agency), Bindoon is assigned to the sub-tourism brand of 'Chittering Valley'.

'Things to do in the Chittering Valley' promoted by Destination Perth and Tourism Western Australia include:

- *Follow the Chittering Farm Flavour Trail to boutique farms and see where your food comes from*
- *Enjoy a picnic at one of the many lovely parks*
- *See the wildflowers in spring during the September Spring Festival or from natures roadside garden*

- *Visit the Brockman Arts & Craft Centre*
- *Enjoy great food at the popular Bindoon Bakehaus or Stringybark Winery & Restaurant*
- *Enjoy one of many walk and drive trails in the region*
- *Purchase fresh fruit and vegetables from roadside stalls*
- *Taste local produce at the annual A Taste of Chittering festival in August*

The proposed development of a world-class adventure tourism attraction in Bindoon may significantly elevate the tourism status, overall brand awareness, and consumer market appeal to the Chittering Valley.

Proposed Project Site Overview

The Shire of Chittering local economy is based on broad acre farming, orchards, small rural and semi-rural lifestyle residential properties. There is limited industry being extractive industry operations (gravel, clay and sand), the State livestock yards, mineral sands processing, shearing, tourist attractions, viticulture, wineries and other small businesses.

The proposed Bindoon Mountain Bike and Adventure Park site at Lot 3874, Bindoon is set on 894,926 m² (89.49 Hectares) of undulating countryside and bushland with 360-degree views of the surrounding rural area.

The property known as 'Red Hill' (known to locals as 'Bindoon Hill') boasts an expansive 70-metre-high hill overlooking the Bindoon town centre, orchards, lakes, valleys, farmland and the Julimar State Forest.

The property forms an irregular shape, having a relatively steep topography throughout with a ridgeline extending through the centre of the site on a north to south alignment. The soils have a high gravel content and the

western side of the ridgeline is vegetated, whilst the eastern side has been partially cleared for grazing purposes.

The key arterial road to the property and Bindoon township from Perth is the Great Northern Highway (Highway 95).

The soon-to-be completed NorthLink WA Tonkin Highway extension will allow greater access from the Perth metropolitan area within 45 minutes (due late 2019) and will significantly reduce the time to Bindoon from major Perth hubs.

Electricity, town water and telephone services are available at the south eastern corner of the property at Myrtle Way.

There are no established built formations on the property with the exception of a telecommunications tower (Optus Mobile Pty Ltd, Vodafone Network Pty Ltd) located on the northern end of the hill's crest.

Figure 7: View west from Lot 3874 hill crest

Connectivity to Bindoon Town Centre

Lot 3873 Chinkabee Road, Bindoon is located adjacent to the town centre. Laying east of the town, the elevation of the site runs parallel to the Great Northern Highway and the main footprint of Bindoon's business and retail hub. Connectivity to the town centre is via Great Northern Highway, with all relevant retail, hospitality and community services within walking or cycling distance of the proposed site.

Importantly, the location of the following key existing businesses create opportunistic synergies with the proposed development:

1. **Bindoon Sporting and Recreation Association (Chinkabee Complex):** The location of this building is directly adjacent to the proposed trail hub or lay down/parking area. The building has a highly functional internal layout and opportunities can be explored that may benefit the Sporting Club operations and create an additional layer of convenience for the proposed mountain bike and adventure park site.

2. **Chittering Health Centre:** Mountain biking by its very nature does have an element of risk for the rider and injury can happen. Having medical services such as the Chittering Health Centre at the base of the proposed site creates an additional level of appeal to the market segment who at most other mountain biking trail locations, typically need to travel some distance to seek medical attention if required.

3. **Shire of Chittering Administration and Works Depot**: Located opposite the site on the Great Northern Highway within a short walk or drive may provide ease of access for service and maintenance personnel.

The Shire of Chittering is investigating plans to develop a tourist park (caravan, camping and cabin park) following the completion of a Feasibility Study in 2018. The proposed land parcel for a tourist park adjoins the

proposed subject site and may be a critical element of sustainable operations with the provision of affordable, quality accommodation, caravan and camping to meet the needs of visitors to a mountain bike and adventure park attraction.

Site Access

Currently the subject site can be accessed via two roads, Chinkabee Road and Myrtle Way, which are yet to be constructed on the site, however they are gazetted roads.

Typical road access in its current form is via an adjacent property which is under the same private ownership as the proposed site for procurement. Further negotiations and planning would be required to develop/construct a visitor market relevant, and local resident appropriate access road to the property.

Topography

It is worth noting a mountain bike trail development on the subject site would offer a more aesthetically appealing outcome for the town, local community and visitors to Bindoon due to the relatively low impact on vegetation removal and general clearing required by mountain bike trails.

Retaining most of the existing topography would assist to maintain the natural look of the overall escarpment from the main visual corridor which is situated along the Great Northern Highway and Bindoon main street.

Site Constraints

The topography and gradient of the site and the elevation dictate that most development options for the site would be deemed too difficult and too expensive. Both valuations undertaken on the site support this notion and go as far as suggesting that broad agricultural development would also be difficult because of the topography.

The unique nature of mountain bike trail design relies on such topography and elevation, which is why this appropriately situated site has been proposed.

Access to the site is an issue. Part of the initial design concept offers a counter measure for this access by incorporating a portion of the land parcel, identified for future caravan park development. Further discussion surrounding this will need to take place, however there are a range of operational, development and construction synergies which would support this initiative.

Site Acquisition Overview

There have been two recent valuations of the property, one commissioned by the Shire of Chittering and one commissioned by the owners of the subject property. Valuations were as follows:

1. Opteon Valuation commissioned by the Shire of Chittering 31 July 2018

   Valuation amount $290,000 to $360,000

2. Independent Valuers of Western Australia commissioned by the subject landowners 5 December 2018

   Valuation amount $805,000

The disparity between the two valuations is far too vast and the justifications for each valuation are contradictory in nature.

It would appear the most effective outcome would be to enter into discussions with the current owners to find an agreeable value of the subject site or to seek a third independent valuation of the property.

Such is the variance of valuations, the only way to factor this part of the overall capital investment into the financial modelling for the purpose of this Feasibility Study is to assume an averaged value of the two completed valuations.

Additionally, a small portion of the land directly to the west of the subject site, which is detailed on the design concept, would also be factored into the overall land acquisition process. The land is under the same private ownership as the main subject site. *This has not been currently valued, however initial discussion have indicated support from the current owners.*

Environmental Aspects

There have been no environmental sensitivities identified at Lot 3874, Bindoon throughout the course of this research study phase that may impact on a mountain bike and adventure park development in Bindoon.

The mountain bike trails network and park design concept has been designed on an acute understanding of environmental principles and working within the natural formations of the subject site to mitigate such issues as:

- Destabilisation of soils and slope

- Minimise vegetation clearing

- Minimise any potential spread of pathogens, diseases and weed

Although a preliminary high-level desk top assessment has not uncovered any major environmental risks or issues, a more detailed Flora and Fauna Assessment of the subject site will need to be commissioned as part of the overall detailed design process, should the proposed project be considered worthy of proceeding.

Environmental Impact Assessment and Planning

An Environmental Impact Assessment may be the first recommended pathway to evaluating the likely impacts of a proposed mountain bike trail network development in Bindoon taking into account inter-related environmental, socio-economic, cultural and human-health impacts, both beneficial and adverse.

Secondly, the development of an Environmental Management Plan may inform the design, development, construction and operation of a new facility.

Some of the content required to establish a rigid environmental management plan may include:

- Contributing to Conservation and Sustainability

- Communication and Education

- Managing Risk to the Environment

- Sustainable Energy Use

- Environmental Monitoring and Reporting

- Fire Management

- Waste Management

- Interpretation

- Compliance and Sector Specific Requirements

- Water Use

- Wildlife Issues

- Social and Cultural Sustainability

Consumer sentiment for environmentally friendly developments and operations is also a key factor to ensure extra layers of marketability for the proposed development.

A strong Environmental Management Plan to care for the flora, fauna, soil and environment in the proposed development and operational stages of the project would need to be developed and implemented prior to project commencement.

Bushfire

The WA Department of Planning, Lands and Heritage has identified Lot 3874, Bindoon as a Designated Bush Fire Prone Area [1]

Additional planning and building requirements may apply to development on this site.

Designated bush fire prone areas have been identified by the Fire and Emergency Services Commissioner as being subject, or likely to be subject, to bushfire attack. Additional planning and building requirements may apply to development within these areas. A further assessment of the bushfire risk may also be required under the Planning and Development (Local Planning Scheme) Regulations 2015 and the Building Code of Australia. The Shire of Chittering will be aware of the requirements that apply in this area.

A comprehensive Bush Fire Management Plan in the proposed development and operational stages of the project would need to be implemented prior to project commencement.

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[1] Landgate search, Crown Allotment 3874, Bindoon, WA, May 2019

Section 5:

Situation Analysis

Figure 8: Image courtesy Tourism WA

5. Situation Analysis

The following situation analysis details the current status of outdoor recreation and tourism industry product and associated services in the Shire of Chittering as situated in the tourism regions of Destination Perth (WA Tourism Region); Chittering Valley (Sub-region of Destination Perth); and the broader mountain biking, trails and outdoor recreation sector across Western Australia.

It describes the competitive situation in respect to the development of recreation/tourism products and services, a needs analysis, and community benefits.

Transport Data and Statistics

Road Access

Bindoon, situated in the Shire of Chittering is accessible via sealed roads, in close proximity to the Perth metropolitan area to the south making the destination highly accessible to self-drive visitors in all types of vehicles.

Note – The subject site at Lot 3874, Bindoon is currently a private property with unsealed, gravel access roads, however the roads are short enough not to impact on any hire car / motorhome / trailer prohibitive driving agreements from the public, tourists and coach travellers.

Main arterial roads to Bindoon include:

- Great Northern Highway (north and south)
- Bindoon Moora Rd (north)
- NorthLink WA Tonkin Highway extension (south from late 2019)

Wheatbelt Traffic Digest Count of Passing Vehicles[2]

The Wheatbelt Traffic Digest 2013/14 - 2018/19 report summarises the average number of vehicles and heavy vehicles travelling through the town of Bindoon from northern, north-west and southern directions. Data from the key transport routes to and from Bindoon have been outlined in the table below.

Location	Average Daily Traffic Count (% Heavy Vehicles)			
	Year 2015/2016	Year 2016/2017	Year 2017/2018	Year 2018/2019
Great Northern Hwy North of Teatree Rd	2,950 (28.1%)	-	3,700 (23.9%)	-
Great Northern Hwy South Bindoon Moora Rd			2,750 (26.3%)	2,830 (34.5%)
Great Northern Hwy North Bindoon Moora Rd	1,540 (38.5%)	1,610 (37.6%)	1,580 (38.0%)	1,690 (42.5%)

Table 5: Daily traffic counts on Great Northern Highway, Bindoon

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[2] Wheatbelt Traffic Digest 2013/14 - 2018/19, Main Roads WA

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Note: The traffic volumes in the Wheatbelt Traffic Digest report are expressed as the average number of vehicles at each location on a typical weekday (Monday to Friday) for the metropolitan area, and a typical day (Monday to Sunday) for regions outside the metropolitan area. Caution should be taken with using these figures as accuracy depends on the seasonality of when counts were taken and future road network changes that will come into play from late 2019 (NorthLink WA)

High traffic flow through the town of Bindoon may present an excellent marketing and brand awareness opportunity for a proposed Bindoon Mountain Bike and Adventure Park with the provision of quality signage at, and en route to the Park e.g. roadside billboards, tourist signage, wayfinding signage, entrance statement signage etc.

Great Northern Highway Bindoon Bypass

It is important to note Federal Government planning is underway for the Great Northern Highway Bindoon Bypass to improve freight efficiency, connectivity and travel time for heavy vehicles to the north and south of Bindoon. The new road will bypass the townships of Chittering and Bindoon. Commencement date yet to be released.

Whilst this will reduce the amount of traffic travelling past the proposed mountain bike and adventure park site, the removal of heavy vehicles through Bindoon will enhance the local amenity of the township for residents and visitors and will provide a safer environment for pedestrians and cyclists.

Seasonality

Seasonality does not affect vehicle access via main roads to Bindoon however as identified by the Chittering Visitor Centre there are distinct low and high seasons for tourism visitation in Bindoon.

Bindoon Tourism Seasonality[3]
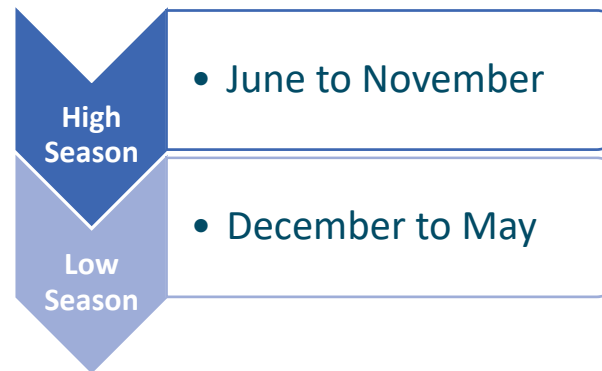
Figure 9: Bindoon Tourism Seasons

Bindoon Climate[4]

Bindoon Median Weather	Highest	Lowest
Average Maximum Temperature	33.1°C (Jan/Feb)	18.3°C (July)
Average Minimum Temperature	17.0°C (Feb)	5.4°C (July)
Average Rainfall	125.3mm (July)	10.5mm (Dec)

Table 6: Bindoon Median Weather Statistics, Gingin Aero Site: 009178

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[3] Chittering Visitor Centre consultation, May 2019

[4] Bureau of Meteorology, Climate statistics for Australian locations: Gingin Aero

Mountain Biking Seasonality

Mountain biking in the Midwest to South West of Western Australia does not have seasonality restraints although evidence of reduced mountain bike-related competitions and events in December and January has been determined.

The Western Australian Mountain Bike Association (WAMBA) Western Australian Race Calendars for 2018 and 2019 identified annual schedules of races and competitions across the disciplines of Cross-Country Olympic (XCO), Cross Country (XC) Marathon, Gravity Enduro, Down Hill and Cyclocross between February and November.

See Attachment 2: WAMBA Western Australian Race Calendar 2019

Reasons for mountain biking seasonality, i.e. Low season – December to January, may be impacted by several factors:

- Too hot to wear safety gear, helmets etc. for mountain biking
- Riding surface is hot and dry
- Fear of bushfires
- Busy Christmas / social season, reduced physical activity
- Mountain bike clubs and training on break during school holiday period
- Competitions and racing on break during school holiday period

Opportunities to reduce seasonality for a mountain bike and adventure park destination may include, but are not limited to:

- Unique wet element of trail network system e.g. reticulated trails
- Wet area at site or within the township e.g. water park / features, water spray tunnel / hoop tunnel, Summer pop up water park etc.
- Easy access to drinking water e.g. water fountains, free potable water for water bottle refills, bottled water sales
- Sale of ice creams, hydration/supplement products (e.g. gels and power drinks)
- Strong bushfire management and emergency response plans demonstrated on signage and website / customer education strategies
- Events and competitions in Summer months e.g. Junior skills park competition, astronomy camp out nights, Mountain biking coaching programs, hosting club summer camps, school holiday programs etc.
- Promotion of summer mountain biking apparel and equipment sales e.g. local retailer, business website online sales
- Diversified markets e.g. tour groups, vacation care groups

Public / Commercial Transport

Public Road Transport

A TransWA Coach Service 'East Perth to Geraldton and Kalbarri to East Perth via Moora (N2 Timetable)' operates on Tuesdays, Thursdays, Saturdays and

Sundays.[5]

On this route, East Perth and Midland Train/Bus Stations connect the Perth metropolitan area with coach services to Bindoon arriving and departing at the front of the Shire of Chittering Offices adjacent to the proposed subject site.

Getting to Bindoon via TransWA Coach			
Depart / Arrive	**Time**	**Journey Time**	**Fare One Way/Return**
Sunday Depart East Perth	11:45 am	Via East Perth 1hr, 17mins	Via East Perth or Midland
Sunday Depart Midland	12:10 am	Via Midland 52 mins	Adult $18.05 / $36.10 Conc. $9.05 / $18.10
Sunday Arrive Bindoon	1:02 am		
Tue/Thu/Sat Depart East Perth	9:30 am	Via East Perth 1hr, 17mins	Via East Perth or Midland
Tue/Thu/Sat Depart Midland	9:55 am	Via Midland 52 mins	Adult $18.05 / $36.10 Conc. $9.05 / $18.10
Tue/Thu/Sat Arrive Bindoon	10:47 am		

Returning to Perth Metro via TransWA Coach:			
Depart / Arrive	**Time**	**Journey Time**	**Fare One Way/Return**
Sunday Depart Bindoon	5:26 pm	To East Perth 1hr, 19mins	To East Perth or Midland
Sunday Arrive Midland	6:20 pm	To Midland 54 mins	Adult $18.05 / $36.10 Conc. $9.05 / $18.10
Sunday Arrive East Perth	6:45 pm		
Tue/Thu/Sat Depart Bindoon	3:26 pm	To East Perth	To East Perth or

Tue/Thu/Sat Arrive Midland	4:20 pm	1hr, 19mins	Midland
Tue/Thu/Sat Arrive East Perth	4:45 pm	To Midland 54 mins	Adult $18.05 / $36.10 Conc. $9.05 / $18.10

Table 7: TransWA coach N2 Timetable servicing Bindoon

See Attachment 3: TransWA N2 Timetable (Perth to Bindoon)

Other Transport Services

There are no direct public transport services via train or air to Bindoon. The closest access via train is Midland Railway Station (approx. 62km), and by air is the Perth Domestic and International Terminals (approx. 73km).

Car, bus, campervan and motorhome hire and charter vehicles are available across a variety of Perth metropolitan and regional locations.

Opportunities to enhance the frequency of public or commercial bus transport services to and from Bindoon may be negotiated (if viable) with providers such as TransWA and Integrity Coach Lines should demand increase for these services. Opportunities for the development of local transport operators and charter services may also be fostered.

Communications

Communication / telecommunication services available in the Shire of Chittering include:

- NBN Service Available

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[5] TransWA N2 Timetable (Perth to Bindoon)

- UHF CB Repeater Channel (Bindoon – BIN02)

- Free to Air Television (metropolitan and country channels)

- Pay TV connection access e.g. Foxtel, Fetch TV, Netflix, Stan etc.

- Radio (ABC National, rural services and commercial AM and FM radio stations)

- Western Tourist Radio - www.TouristRadio.com.au - 87.6FM

- Postal service runs daily

- Newspapers - major metropolitan and national newspapers available daily. Regional newspapers include[6]: The Advocate, Chittering Times Regional Community Newspaper and Northern Valleys News

- Online channels from the Chittering Shire, Visitor Centre and online community: Instagram: @chitteringshire @visitchittering @chitteringspringfest | Facebook: @shireofchittering @visitchittering and public groups 'Chittering Bushfire Ready', 'Shire of Chittering Have Your Say' and 'Chittering Youth Crew'

Marketing and promotional budget for delivery across a variety of communication portals to the local community and broader tourism and mountain biking consumer markets via a mix of traditional and digital marketing activities and collaborations is essential to the success of any new tourism asset.

Culture and Heritage

Aboriginal Culture

The South West of Western Australia (inclusive of the Shire of Chittering area), is recognised as 'Nyungar Country', and was originally home to the Yuat People, and the Ballardong and Whadjuk People over time.

At the time of the 2016 Census, the Shire of Chittering as a whole, had a relatively small Aboriginal and/or Torres Strait Islander population of 123 people, just 2.2% of the Shire's population. 50.4% of Aboriginal and/or Torres Strait Islander people were male and 49.6% were female (Median age – 15).

Chittering (S) (Local Government Areas) People Characteristics - Aboriginal and/or Torres Strait Islander peoples[7]				
Count based on place of usual residence on Census night.	Chittering (S)	%	WA	%
Male	63	50.4	38,027	50.0
Female	62	49.6	37,959	50.0
Median age	15	-	23	-

Table 8: Aboriginal and/or Torres Strait Islander People residing in Shire of Chittering

There have been no recognised Aboriginal heritage sites located in or near the property of Lot 3874, Bindoon identified throughout the course of this research study phase that may impact on a mountain bike and adventure park development in Bindoon.

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[6] www.newspapers.com.au

[7] ABS, Census 2016, People Characteristics - Aboriginal and/or Torres Strait Islander peoples

Aboriginal Tourism

With research revealing that Western Australia's Aboriginal tourism businesses made a significant contribution to WA's economy adding $43.8 million to the Gross State Product in 2017, in September 2018, Western Australia's Tourism Minister Paul Papalia commented *"There is a strong opportunity to capitalise on the increasing interest in Aboriginal tourism, and the State Government, through Tourism WA and in partnership with WAITOC (Western Australian Indigenous Tourism Operators Council) is working on a number of initiatives to help further grow the sector in the State."*

Cultural walking tours, traditional bushfoods, storytelling, festivals, dance, ceremony, art and craft visitor demand to experience one of the world's longest surviving cultures is clearly on the rise. Showcasing this in an accessible, authentic way requires strong cultural knowledge and skills.

An opportunity to develop authentic Aboriginal tourism product and employment pathways for Aboriginal people e.g. cultural walking tour / experience on a walking trail, may be an ideal product diversification and may appeal to a broad variety of target markets seeking cultural education, awareness or leisure experiences to satisfy market demand.

Cultural and Heritage Tourism

Cultural tourism is another important component in driving visitors to regional destinations and the State Government has a Cultural Tourism Policy that is embraced by both the Department of Local Government, Sport and Cultural Industries and Tourism WA. The Policy states that all art forms and cultural organisations interact with tourism in:

- The presentation of events, promotions and trade delegations;

- The generation of cultural packages for tourists to Western Australia;

and

- Expressing the identity of Western Australia as a region.

The Shire of Chittering and in particular, Bindoon boasts some significant places of historical and cultural interest. The Chittering Road Board building is a Heritage Listed site and the Brockman Precinct is home to:

- Bindoon Heritage Museum;

- Bindoon Arts and Crafts Group; and the

- Bindoon Men's Shed.

There are several art studios, creatives and giftware outlets throughout the Shire of Chittering.

Cultural and heritage tourism products such as these enhance the Shires destination appeal when coupled with a major attraction such as a mountain bike and adventure park.

Shire of Chittering Local Services Capacity

Health and Medical Services

Chittering Health Centre

Operated by Jupiter Health and Medical Services

- Located within a short walk or bike ride of the proposed subject site at 6 Woolah Rise, Bindoon

- Opening hours Monday to Friday 8.30am – 6.00pm**

- 2 x General Practitioners, Nurses, Optometrist, Skin Cancer Checks, Pathology, Iron Infusions, Minor Surgery, Family Planning, Pregnancy Tests, Pre-employment Medicals, Health Assessments, ECG,

Spirometry etc.

Medical Emergency Services

Weekdays, weekends, after hours emergency services

- St John Ambulance Chittering/Gingin Sub-Centre, 321 Weld Street, Gingin *Note: St John Ambulance facility proposed and property site identified adjacent to Chittering Medical Centre for Bindoon in the future*

- Nearest Hospital Emergency Departments – Joondalup Health Campus (64km) and St John of God Midland Hospital (65km) - 50mins

- Nearest after hours / weekends clinic – Landsdale Medical Centre After Hours and Walk in Clinic (67km) – 55 mins

WA Country Health Services

- Chittering branch

- Located at the Chittering Health Centre, 6 Woolah Rise, Bindoon

- Opening hours Monday to Friday 8.00am – 4.30pm

- Community health nursing, speech pathology, dietetics, occupational therapy, social work, midwifery/antenatal, physiotherapy (currently vacant)

Fire Brigade

Bindoon Volunteer Bush Fire Brigade and **Incident Support Brigade**

- Located at Edmonds Place, Bindoon

Police

Gingin Police

- Located at 4 Constable St, Gingin

Ranger Services

Shire of Chittering

Waste Management Services

Avon Waste

- Contractor to Shire of Chittering for waste collection

Technical Services

Shire of Chittering

- Roadworks, public property maintenance, signage, lighting, verges, tree pruning etc.

Visitor Information Services

Chittering Visitor Centre

- Located at 6180 Great Northern Hwy, Bindoon

- Opening hours HIGH SEASON (June to November)

  - Monday to Friday   9am to 5pm
  - Saturdays   9am to 3pm
  - Sundays   10am to 2pm

- Opening hours LOW SEASON (December to May)

  - Monday to Friday   9am to 5pm
  - Saturdays   9am to 12pm
  - Sundays   10.30am to 1.30pm

The Chittering Visitor Centre is located on the main street of Bindoon at 6180 Great Northern Highway, Bindoon, within a short walk of the proposed subject site and operated by the Chittering Tourist Association (Inc.). The three main functions of the Visitor Centre include:

- Visitor servicing and information

- Destination promotion as 'Visit Chittering'

- Sales of local art, craft and giftware

- An opportunity for the Visitor Centre to sell tickets, merchandise, hire goods, and mountain biking-related equipment may be presented

Figure 10: Chittering Visitor Centre

1. As the Chittering medical centre is only open Monday to Friday, a clear shortfall in local weekend medical services (outside of ambulance services), has been identified with the likelihood of mountain bikers being at a risk of physical injury during high visitation weekend periods.

2. Should the Shire of Chittering own and operate the proposed mountain bike and adventure park, employment of additional personnel in the areas of technical services, waste management and tourist information services may be required to maintain the premises and to provide high quality tourism services for a potential influx of mountain bike and adventure park patrons visiting Bindoon.

Local Tourism and Recreation Product

A review and update of audits previously commissioned by the Shire of Chittering has been undertaken to assess current tourism and recreation affiliated products and services that may impact on the appeal, market diversification and ongoing sustainability of a mountain bike and adventure park in Bindoon.

The review has identified six tourism and recreation categories:

1. Tourism and recreation attractions

2. Natural attractions

3. Trails

4. Food, beverage and culinary

5. Events

6. Accommodation, caravan and camping

The review is followed by:

Local Tourism/Recreation Product & Service Gaps – Recommendations

Competition: Mountain Biking/Recreation Product

A review of potential competing products to a mountain bike and adventure park in Bindoon used by the largest target consumer market and population base (Greater Perth), has been undertaken to assess current and future competition.

Three key sectors emerge as competition to sustainable visitation at a proposed new mountain bike and adventure park in Bindoon:

1. Mountain bike trails, networks and hubs

2. Adventure and amusement parks

3. Outdoor recreation camps

See Section 5: Situation Analysis, Competition: Mountain Biking and Recreation Product

SWOT Analysis: Mountain Bike & Adventure Park

The following SWOT Analysis provides a snapshot of key Strengths, Weaknesses, Opportunities and Threats to be taken into consideration when analysing the suitability and feasibility of developing a mountain bike and adventure park in Bindoon.

Note: This SWOT has been cross-referenced with 'SWOT Analysis - Tourism in the Shire of Chittering' for the Northern Growth Alliance Tourism Strategy Draft Report released to the Shire of Chittering in April 2019 by the Wheatbelt Development Commission

STRENGTHS

- Only mountain bike park north of Perth
- Current under-supply of sanctioned mountain bike trails within 1 hour of Perth
- Close proximity to Greater Perth consumer market and population
- Close proximity to Swan Valley tourist region
- New NorthLink WA (launching late 2019) will decrease travel time from Perth to Bindoon
- Located off main arterial road, Great Northern Highway - high visibility site
- Attractive undulating bushland property with 360-degree scenic vistas
- Large land parcel for ongoing development
- Existing tourism and recreation product in the region to provide complementary activities for visitors
- Strong existing walking and self-drive trails product
- Existing events calendar in the region
- Positive community sentiment for a mountain bike park/attraction in Bindoon
- Co-location of an adventure park or similar activity on site will appeal to a broader consumer market - an advantage over stand-alone mountain bike trails
- Growing local population
- Safe, relaxed, friendly country location
- Natural landscapes/ environment (clean air, rare species and ecological communities)
- Wine and fresh produce region
- Private property does not have the restrictions and inflexibility of a Department of Biodiversity, Conservation and Attractions operated mountain bike trails network

WEAKNESSES

- Drive distance from Greater Perth area (major population) for regular visitation (in particular mid-week)
- Lack of daily public transport access to and from Bindoon
- Outdoor business operation on large rural property may lack security of assets
- Lack of local mountain biking instructors and coaches (Shire of Chittering)
- Lack of quality accommodation, caravan and camping options within walking/riding distance
- Location lacks Summer appeal
- Lack of existing access to water, electricity etc. across the entire site
- No sewerage at site
- Limited funds (Shire of Chittering, local, regional) risk ongoing growth and sustainability
- Low general brand awareness or unique attractions for existing 'Chittering Valley' brand and local tourism products
- Poor online tourism presence and online bookable product in the area
- Lack of hospitality establishments (cafes, restaurants, licenced premises) in Bindoon
- Lack of evening activities in Bindoon
- Lack of existing Aboriginal tourism product
- Local residents may not understand the 'value of tourism'
- Local government governance and management may restrict business development and operations

OPPORTUNITIES

- Provision of high quality recreational and healthy lifestyle amenities that will appeal to, and benefit Shire residents and the growing population
- Mountain biking and adventure park and trail town potential to become a signature tourist and mountain biking attraction for Western Australia
- Creation of cycle friendly town trails and cycle road touring destination
- High quality, world-class, unique mountain biking destination and tourist attraction will enhance Tourism WA, Destination Perth and industry sector capacity for domestic and international marketing and product packaging
- Creation of new jobs and employment in the Shire
- Creation of economic stimulation and private investment in the Shire
- Development of complementary products, services, businesses and partnerships by Shire residents
- Enhance the visitor experience in the 'Chittering Valley' tourism region
- Increase overnight visitation and consumer spend in the Shire
- Revenue source that can be increased through customer spend and yield development of associated add-on sales points e.g. tuition, events, competitions, retail, tours, activities
- Diversified product and markets reduce risk of seasonality and changes in consumer preferences e.g. locals, community groups, Perth market, schools, tour groups, clubs, corporate sector
- Increase market awareness and year-round visitation through brand and marketing enhancement; e-commerce, business development and partnerships with key stakeholders

THREATS

- Development of competing mountain bike or similar attraction north of Perth within closer proximity to Perth
- Competition from other mountain bike and adventure park operators and destinations in Perth/WA
- Downturn in economy resulting in reduced discretionary spend on school camps, recreation and tourist activities
- Great Northern Highway Bindoon Bypass may reduce general traffic, visibility, brand awareness of the site
- Natural disaster e.g. bush fires
- Lack of support and collaborative partnerships between key stakeholders e.g. tourism operators, local residents, businesses, government authorities, schools
- Access to skilled, qualified and experienced employees in the area
- Security of outdoor facilities and amenities
- High impact mountain biking activities at risk of injury and liability
- Division of direction and support by Shire of Chittering
- Development costs exceed budget
- Poorly managed operations and facility maintenance may result in a negative customer experience and damage to brand/reputation
- Lack of marketing budget and activities may have a negative impact on visitation, revenue and sustainability

Risk Management

A Risk Management Audit has been conducted, providing an extensive overview of potential risks for the development of a mountain bike and adventure park attraction.

See Section 22: Risk Management, Risk Management Audit and Analysis

Grants and Funding Assistance

Research into the current availability of grants and funding programs as at May/June 2019, has been undertaken to identify opportunities for financial contribution, co-contribution and assistance across a variety of agencies.

This list may not be exhaustive and further investigation by the Shire of Chittering is recommended should the proposed Bindoon Mountain Bike and Adventure Park development be approved to continue into the next phase of research, design and development.

Note: Eligibility applies, and some grants may be suitable for the Shire of Chittering or partnering private or non-profit organisations.

Local Government

Community Assistance Grants and Event Sponsorship

2019/20 Grant Applications are Now Open and will close at 4pm, on Friday 28 June 2019

Each year the Shire if Chittering allocates funds to various 'not-for-profit' organisations which operate within the Shire. This funding is separated in to three different categories and is designed to provide benefits to Shire residents through recreational, sporting, social or cultural means.

- Community Assistance Grants: Funding towards infrastructure and equipment
- Sponsorship: Funding towards events and projects, annual or one-off
- In-Kind Support: In-Kind Support provided by the Shire staff

KidSport Funding

Families of eligible children between 5 and 18 can access financial contribution towards club membership (up to $150)

*Club must be a registered KidSport Club in the Shire of Chittering

Wheatbelt Development Commission

Regional Economic Development Scheme

The Regional Economic Development Grants (RED Grants) program is a State Government initiative that invests in community driven projects to stimulate economic growth and development in regional Western Australia.

The grants will support individual projects that promote sustainable jobs, partnerships, productivity, skills and capability, as well as stimulate new investment and industry diversification.

www.wheatbelt.wa.gov.au/funding/regional-economic-development-scheme1/

Regional New Industries Fund

The State Government is committed to building regional economies that are entrepreneurial, creative and technology-driven to create sustainable job opportunities for regional people.

The State Government's Regional New Industries Fund will allocate $4.5 million across the nine regions of Western Australia to support venture creation, accelerate small-medium enterprise growth and seed innovation initiatives. Funding totals $4.5 million over four years. The program comprises of two allocations:

- **Regional Stream:** will seed local initiatives that build a communities innovation pipeline and drive long term impact, with up to $300,000 available to each region.

- **State Network Stream:** will fund projects that increase connectivity and build capability across regions, the state and to international markets. In particular, the stream priorities initiatives that enable technology development, service innovation and market access.

www.wheatbelt.wa.gov.au/funding/regional-new-industries-fund/

State Government

Tourism Western Australia

- **Major Events Funding:** Tourism WA sponsors a range of major sporting, arts, cultural and culinary events in Western Australia

- **Regional Events Program:** The Regional Events Program supports medium to large regional events across the State

- **Regional Events Scheme:** The scheme is an annual funding round for smaller, developing regional events across the State. It includes the

Regional Aboriginal Events Scheme

www.tourism.wa.gov.au/Industry-support/Pages/Industry-support.aspx#/

Department of Local Government, Sport and Cultural Industries

*Sport and Recreation WA Division

- **Community Sporting and Recreation Facilities Fund:** (CSRFF) aims to provide financial assistance to community groups and local governments to develop basic infrastructure for sport and recreation. The program aims to maintain or increase participation in sport and recreation with an emphasis on physical activity, through rational development of good quality, well-designed and well-utilised facilities.

  www.dsr.wa.gov.au/funding/facilities-(csrff)

- **Regional Organisation Grants:** (ROG) aims to improve the quality of sporting and active recreation opportunities for people in regional Western Australia whilst assisting the Department meet its regional strategic outcomes.

  ROG is a funding scheme only available to peak bodies considered regionally or culturally significant and have the ability to fulfil specific objectives of the Department. It caters for sporting groups through funding from the Sports Lotteries Account.

  www.dsr.wa.gov.au/funding/regional

- **Active Regional Communities Grants:** (ARC) aims to increase the opportunities for regional people to participate in sporting and active recreational activities in regional Western Australia and is tailored to meet the ever-changing demands and challenges of sport and active-recreation groups within the nine diverse regions of Western Australia. Funding categories include:

  - Participation
  - Capacity Building
  - Event Hosting

  www.dsr.wa.gov.au/funding/regional

Federal Government

Australian Apprenticeships Incentives Program

Ongoing program by the Department of Education and Training

The objective of the Australian Apprenticeships Incentives Program is to contribute to the development of a highly skilled and relevant Australian workforce that supports economic sustainability and competitiveness.

The Program contains a range of employer incentives and personal benefit payments to Australian Apprentices.

www.australianapprenticeships.gov.au

Entrepreneurs' Programme – Incubator Support: New and Existing Incubators

Ongoing program by the Department of Industry, Innovation and Science

Incubator Support is an element of the Entrepreneurs' Programme. The $23 million initiative supports the Australian Government's commitment to:

- Assist Australian start-ups to develop the capabilities required to achieve commercial success in international markets and realise their economic potential faster than they otherwise would

- Develop Australia's innovation ecosystem including in Australian regions.

The initiative provides grant funding through two components, both of which require a funding contribution from applicants.

www.business.gov.au/is-nei

Entrepreneurs' Programme - Business Growth Grants

Ongoing program by the Department of Industry, Innovation and Science

For recipients of an Entrepreneurs' Programme Business Management service and your business adviser/facilitator recommends specific business improvement activities to increase your business's capability to trade in Australian markets and/or markets in other countries, you can apply for a business growth grant.

Business growth grants are small grants to engage external expertise to help you implement the recommendations in your plan. The grant amount is up to 50 per cent of eligible project costs. The minimum grant amount is $2,500 (excluding GST) and the maximum grant amount is $20,000 (excluding GST).

www.business.gov.au/assistance/business-growth-grants

Entrepreneurs' Programme - Accelerating Commercialisation

Ongoing program by the Department of Industry, Innovation and Science

Accelerating Commercialisation provides access to expert guidance and grants to help businesses commercialise their novel products, processes and services.

Accelerating Commercialisation offers the following services and grants to successful applicants:

- Commercialisation Guidance
- Accelerating Commercialisation Grants
- Portfolio Services

www.business.gov.au/assistance/accelerating-commercialisation

Regional Employment Trials

Ongoing program by the Department of Jobs and Small Business

The Regional Employment Trials program provides local stakeholders in selected regions, including businesses, not-for-profits and local government agencies, with grants to trial local approaches to delivering employment related projects. Regions are primarily based on Regional Development Australia boundaries, unless indicated otherwise.

The objectives of the program are to deliver:

- Strong connections between regional stakeholders, including employment services providers
- Employment initiatives that meet local needs
- Improved awareness of local labour markets
- The potential for improved regional employment outcomes

Minimum grant amount $7,500 / Maximum grant amount $200,000. The grant amount will be up to 75 per cent of eligible project costs

www.business.gov.au/ret

Tailored Assistance Employment Grants

Ongoing program by the Department of the Prime Minister and Cabinet

Tailored Assistance Employment Grants are available to provide funding support to connect working age Indigenous Australians with real and sustainable jobs, as well as assisting Indigenous school students to transition from education into sustainable employment.

www.dpmc.gov.au/indigenous-affairs/employment/jobs-projects-funding-tailored-assistance-employment-grants

Wine Tourism and Cellar Door Grant

*Program launch due between July and December 2019 by Wine Australia **Note this grant is not recommended for the proposed Bindoon Mountain Bike and Adventure Park itself, but to complementary wine tourism operators in the Shire of Chittering to enhance overall tourism product for the destination*

The objective of the Wine Tourism and Cellar Door Grant is to support producers who add value by attracting visitors to wine regions, and thereby encourage wine tourism.

Wine producers who have met the eligibility criteria in the preceding financial year will be able to access an annual grant of up to $100,000 (GST exclusive) for their eligible rebatable domestic cellar door sales. Total funding under the grant program will be capped at $10 million each financial year.

E: cellardoorgrants@wineaustralia.com

Lotterywest

- **Community Events**
  We love supporting events that bring the Western Australian community together to enhance social and cultural connections and reduce isolation.

- **Community Spaces and Places**
  We are interested in supporting community spaces, places and buildings that help the diversity of Western Australians to actively engage in community life.

- **Equipment**
  Need the right tools to get the job done? We have grants designed to help get the necessary equipment in place to support your community.

- **Projects**
  Good ideas are behind every project that makes our community a better place. Project grants can assist you in testing or trialling an initiative.

www.lotterywest.wa.gov.au/grants/grants

Industry Association Funded Programs

Industry Association funded business and workforce development programs for example:

WA Indigenous Tourism Operators Council

(WAITOC)

www.waitoc.com

Tourism Council of WA

(TCWA)

www.tourismcouncilwa.com.au

Outdoors WA

www.outdoorswa.org.au

WestCycle

Includes WA Mountain Bike Association - WAMBA

www.westcycle.org.au

Mountain Bike Australia

www.mtba.org.au

Economic, Regional, Industry Strategies

A variety of economic, regional and industry development strategies, plans, policies and guidelines may influence the future planning, approval, access to grants and funding, or development of a mountain bike and adventure park in Bindoon.

Aligning with key recommendations, strategies and priorities (where appropriate) will facilitate best practice project and operational works and may enable project support and endorsement with relevant government/industry agencies and/or private investors.

Examples of these strategies include:

- **Australian Adaptive Mountain Biking Guidelines** [Break the Boundary; Mountain Bike Australia; Queensland Government]

- **Australian Adventure Activity Standard – Mountain Biking** [Australian Adventure Activity Standards]

- **Australian Mountain Bike Trail Guidelines 2019** [Mountain Bike Australia]

- **Department of Sport and Recreation Strategic Plan 2016-2018** [WA Department of Local Government, Sport and Cultural Industries] *future edition*

- **DoT Long Term Cycle Network for WA** [WA Department of Transport]

- **Guidelines for the Planning, Design, Construction and Maintenance of Recreational Trails in South Australia** [Recreation South Australia]

- **Mountain Bikers Code of Conduct** [Mountain Bike Australia]

- **Northern Growth Alliance Tourism Strategy** [Wheatbelt Development Commission]

- **Our Bike Path 2014-2020** [WestCycle]

- **Outdoor Education and Recreation Activities Policy** [WA Department of Education]

- **Outdoors WA Annual Report 2018 & The Great Outdoors** [Outdoors WA]

- **Perth & Peel Mountain Bike Master Plan** [WestCycle]

- **Regional Cycling Strategies** [WA Department of Transport]

- **Shire of Chittering Mountain Bike Trails Master Plan**

- **Shire of Chittering Sport & Recreation Plan 2012-2022**

- **Shire of Chittering Strategic Community Plan 2017-2027**

- **Shire of Chittering Trails Network Master Plan 2013-2023**

- **Strategic Directions for the WA Sport & Recreation Industry 2016-2020** [WA Department of Local Government, Sport and Cultural Industries]

- **Two Year Action Plan for Tourism Western Australia 2018-2019** [Tourism WA]

- **WA Cycle Tourism Strategy** [WestCycle]

- **WA Mountain Bike Management Guidelines** [WA Department of Local Government, Sport and Cultural Industries; WestCycle; West Australian Mountain Bike Association]

- **WA Mountain Bike Strategy 2015-2020** [WestCycle]

- **Western Australian Bicycle Network Plan Update 2017-2018** [WA Department of Transport]

- **Western Australian Cycling High Performance Strategic Plan** [WestCycle]

- **Western Australian Strategic Trails Blueprint 2017-2021** [Trails Reference Group, TRC Tourism]

- **Wheatbelt Blueprint** [Wheatbelt Development Commission]

External Factors

Other important environmental influences to be noted for the Shire of Chittering's consideration include political; economic; social; technological; environmental; and legal factors. Some of which, may have an impact on business success, and evaluation of these factors will determine which key drivers of change will potentially have strategic and competitive consequences.

Political Factors

- Stability of government (local, State, Federal, mergers etc.)
- Outdoor recreation; tourism; education; and planning policies and regulation
- Tax policies
- Access to grants, funding and industry initiatives for business development

Economic Factors

- Disposable income of domestic and international markets
- School camp and excursion expenditure
- Credit accessibility
- Unemployment rates
- Interest rates
- Inflation
- Viability of associated complementary businesses e.g. adventure park

or tour operators

Social Factors

- Population demographics: (e.g. youth population)
- Distribution of wealth
- Changes in lifestyles and trends
- Educational levels

Technological Factors

- New innovations in business/industry products and services
- Pace of technological innovations and advances e.g. online booking systems
- Pace of technological obsolescence
- New technological platforms e.g. social media, digital marketing

Environmental Factors

- Environmental protection laws
- Waste disposal laws
- Energy consumption regulation
- Popular attitude towards the protection of nature and the environment
- Minimising environmental impact through responsible planning and operations

- Areas of cultural significance

Legal Factors

- Employment regulations (industrial relations)

- Competition and consumer regulations

- Standards, licensing and legislation

- Health and safety regulations

- Product regulations

- Privacy regulations

Section 6:

Consumer Survey Analysis

6. Consumer Survey Analysis

Project Public Consultation Survey

A 'Proposed Bindoon Mountain Bike Park" public consultation survey was undertaken between the 9th and 30th April 2019.

The survey was distributed to the following consumer groups:

1. **Survey Distribution Group 1: Stakeholders (circulation: 330)**

   Identified Shire of Chittering local businesses, Government departments and mountain bike, sport, outdoor recreation and tourism related agencies.

   *Database provided as Attachment 1: Stakeholder Database

2. **Survey Distribution Group 2: Schools (circulation: 1,189)**

   State, Catholic and Independent primary and secondary schools in the Perth Metropolitan and local regional area.

   *Database provided as Electronic Attachment 1: Schools Contact List

3. **Survey Distribution Group 3: Social Media**

   Distributed via Breakaway Tourism's Instagram, Facebook and LinkedIn channels (reach 17,325), then further circulated by interested parties and industry stakeholders.

The survey contained a series of 28 questions and received a surprising 824 responses (significantly higher than expected), with overwhelming support for the project (96.12%) further demonstrating the high demand for quality mountain bike trails close to the Greater Perth region of Western Australia.

Survey Results Snapshot

Survey Snapshot: Proposed Bindoon Mountain Bike Park	
Topic	Outcome
Respondents	824 people completed the survey
Origin	684 respondents resided in the Perth Metropolitan Area; 74 in the Shires of Chittering and Gingin; 58 in Regional WA; 6 from Interstate; and 2 did not provide postcodes
Gender	79% (656) were male; 19% (164) were female; and .36% (3) other
Age	70% (579) of respondents were aged between 25 and 49 years of age
Preferred Activities	Top preferred recreational activity was mountain biking 92%, then general bike riding; trails walking/hiking; bushwalking; and walking
Participation Groups	Highest mountain biking participation group was with family 49% (396)
MTB Participation Type	General mountain biking 83% (677) is most popular followed by downhill trails; cross country (cyclocross, CX, CCX, cyclo-x); freeride trails (technical riding); and pump tracks
MTB Trail Difficulty Level	'Moderate' 82% (664) and 'Difficult' 76% (616) level mountain bike trails were of most interest
Participation in MTB Events	57% (461) of respondents said they (or family members) participate in mountain biking or cycling competitions or events

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Survey Snapshot: Proposed Bindoon Mountain Bike Park	
Topic	**Outcome**
Frequency of Bike Riding	Most common responses were 'every week' 46% (375); 'most days' 24% (200); and 'once or twice per month' 17% (143)
Recreation Travel	Most travel with friends (65% (522) followed by family groups; alone; as a couple; and with groups/clubs.
MTB Park Facilities & Amenities	Top 5 responses included: mountain bike trails; café/kiosk; barbecue/picnic facilities; bike wash station; and shaded areas
Travel Time	Most (354) said they would travel more than 2 hours to experience a mountain bike park
Preferred Booking Method	Booking / entry tickets via a company website was the preferred method 77% (615), followed by 3rd party websites (e.g. Viator.com); or purchase tickets at the gate
Entry Fee Expectations	$10-15 per day 38% (307); as the prices increased: $15-25 per day 28% (228); and $25-35 per day 19% (153)
Visitation Frequency	Most said they would visit a mountain bike park monthly 42% (337), followed by a few times a year; and weekly
Visitation Days	Weekends were most popular (Sunday 89% and Saturday 88%). The lowest interest day of the week was Tuesday (17.95%)
Visitation Time of Year	Most said year-round 67% (532) however the least likely time of year to visit was January to March 4%

Survey Snapshot: Proposed Bindoon Mountain Bike Park	
Topic	**Outcome**
	(32)
Group Excursions or Activities	Those who travel in formal groups, 64% (511) said 'yes' they would consider a mountain bike park for excursions, camps and activities if the right amenities were provided and 7% (59) said they would not. *Others N/A
Group Size	Most group sizes were estimated to be between 10 and 30 people (232), followed by groups of 2 to 10 (141); 30 to 50 (44); over 100 (4); and 50 to 100 (0)
Social Media Usage	The top 3 social media channels were Facebook 91% (722), followed by Instagram 61% (486); and YouTube 50% (397)
MTB Park User Types	Most were mountain bikers 89% (706), followed by outdoor recreation enthusiasts 47% (376). In addition, some respondents identified as potential sponsors (24); investors (27); and co-located attractions/activities (27).
Recommendations	158 separate recommendations were provided by respondents. These consisted mostly of support and excitement for the proposed project. Other common themes included: • Ensure high quality trails and facilities if operating as a commercial park • Ensure trails cater for advanced riders • Include adaptive mountain biking capacity and accessible amenities in the design, prior to development • Accommodation and hospitality must be

Survey Snapshot: Proposed Bindoon Mountain Bike Park	
Topic	**Outcome**
	available • Ample parking • Uplift service
Further Interest in the Proposed Project	423 respondents provided their names and email addresses to register for further information and news of the project in due course

Table 9: Survey Snapshot

Question 1

Q. Would you be interested in experiencing a new Mountain Bike Park in Bindoon?

A: 96.12% (792) of respondents said 'Yes' they would be interested in experiencing a mountain bike park in Bindoon. Not interested, 1.09% (9).
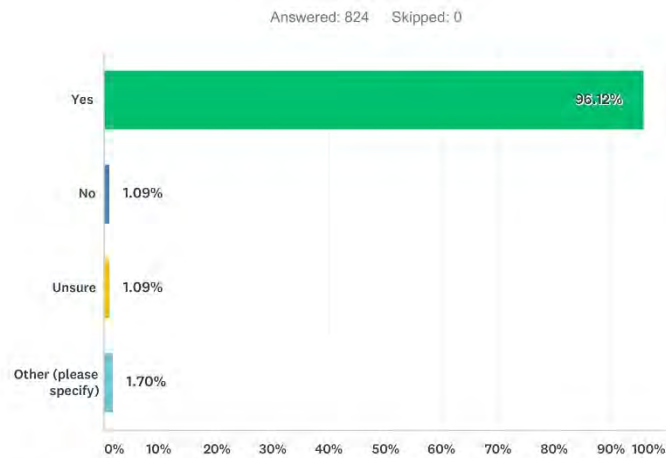
ANSWER CHOICES	RESPONSES	
Yes	96.12%	792
No	1.09%	9
Unsure	1.09%	9
Other (please specify)	1.70%	14
TOTAL		824

Figure 11: Survey Responses: Interest in a Bindoon Mountain Bike Park

Question 2

Q. What is your post code? *(please specify)*

A. Postcode responses were calculated and sorted by area/region and were identified as follows:

Respondent	Locations Identified	Number
Local Respondents	Bindoon, Mooliabeenee, Wannamal, Muchea, Gingin	74
Perth Metro Area	Perth Metro	684
Regional WA: Peel	Mandurah, Dawesville, Waroona, Dwellingup	13
Regional WA: South West	Collie, Bunbury, Australind, Pemberton, Vasse, Cowaramup, Augusta	15
Regional WA: Great Southern	Albany	3
Regional WA: Wheatbelt (East)	Chidlow, Wooroloo, Wundowie, Bakers Hill, York, Northam, Coolgardie, Yerecoin, Kalgoorlie	14
Regional WA: Wheatbelt (North)	New Norcia, Dandaragan, Moora	5
Regional WA: Midwest	Geraldton, Greenough	7
Regional WA: North West	Karratha	1
Interstate	New South Wales	2
	Victoria	1
	Queensland	1
	South Australia	1
	Tasmania	1
No relevant postcode	-	2
Total Responses		**824**

Question 3

Q. What is your gender?

A. 79.71% (656) were male; 19.93% (164) were female; and 0.36% (3) other.

The majority of male respondents closely reflects a survey undertaken by industry peak body, WestCycle which stated 88% of mountain bike riders were male and only 12% were female[8]

ANSWER CHOICES	RESPONSES	
Male	79.71%	656
Female	19.93%	164
Other	0.36%	3
TOTAL		823
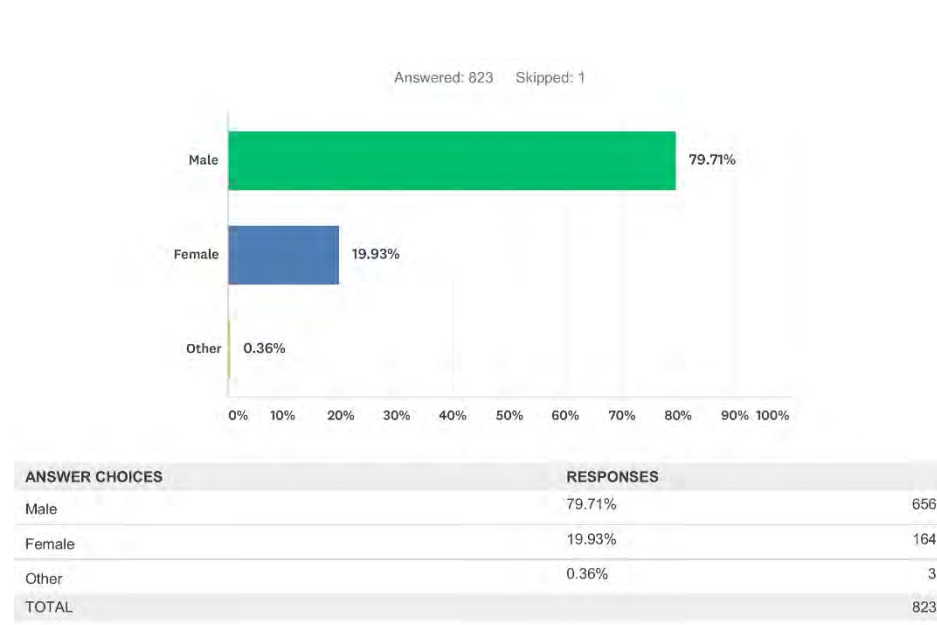
Figure 12: Survey Responses: Gender

Question 4

Q. What is your age category?

A. 70.44% (579) of respondents were aged between 25 and 49 years of age. 17.26% (142) were aged 50 years and over; and 12.28% (101) were 24 years and under.

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[8] Western Australian Mountain Bike Strategy 2015-2020

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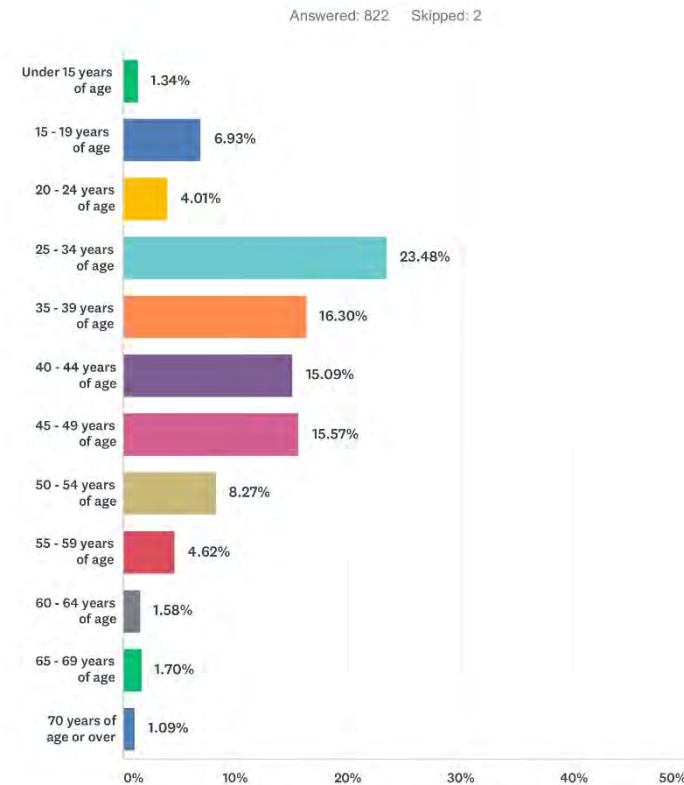
ANSWER CHOICES	RESPONSES	
Under 15 years of age	1.34%	11
15 - 19 years of age	6.93%	57
20 - 24 years of age	4.01%	33
25 - 34 years of age	23.48%	193
35 - 39 years of age	16.30%	134
40 - 44 years of age	15.09%	124
45 - 49 years of age	15.57%	128
50 - 54 years of age	8.27%	68
55 - 59 years of age	4.62%	38
60 – 64 years of age	1.58%	13
65 – 69 years of age	1.70%	14
70 years of age or over	1.09%	9
TOTAL		822

Figure 13: Survey Respronses: Age Category

Question 5

Q. Please select recreational activities of interest to you (select all that apply)

A. The most common recreational activity (understandably within the context of this survey), was mountain biking at 92.42% (746). Other key activities included general bike riding 53.30% (436); trails walking/hiking 36.55% (222); bushwalking 45.97% (376); and walking 27.14% (222).

Additional activities identified by respondents (not featured in the survey) included for example: adventure parks, beach volleyball, kite surfing, skate parks, geocaching, motorsports, kayaking, skiing, tobogganing/luge, canyoning, camping and a variety of specialised sub-sectors of mountain biking.

BMX — 16.87%
Bush walking — 45.97%
Cycle speedway — 1.96%
Cyclo-cross — 11.61%
Endurance running — 8.92%
Enduro (motorcycle... — 10.02%
Four-wheel driving — 29.83%
Fun run events — 11.37%
General bicycle riding — 53.30%
General motorbike... — 16.87%
Gym fitness — 26.65%
Horse riding — 5.99%
Hot air ballooning — 3.79%
Indoor / outdoor... — 17.11%
Indoor group fitness classes — 7.82%
Marathon / half maratho... — 5.50%
Motorcross — 11.86%
Mountain biking — 92.42%
Obstacle racing and m... — 12.84%
Orienteering — 8.80%

Gym fitness	26.65%	218
Horse riding	5.99%	49
Hot air ballooning	3.79%	31
Indoor / outdoor climbing walls	17.11%	140
Indoor group fitness classes	7.82%	64
Marathon / half marathon running events	5.50%	45
Motorcross	11.86%	97
Mountain biking	92.42%	756
Obstacle racing and mud runs	12.84%	105
Orienteering	8.80%	72
Outdoor group fitness classes e.g. boot camp	6.85%	56
Road bike racing	16.87%	138
Rock climbing/abseiling	19.68%	161
Roller skating / inline skating / roller skiing	4.16%	34
Running	16.87%	138
Skateboarding	9.78%	80
Sky diving	5.26%	43
Snow skiing	7.95%	65
Snowboarding	15.16%	124
Track cycling	6.11%	50
Trails walking / hiking	36.55%	299
Triathlon	7.70%	63
Walking	27.14%	222
None	0.12%	1

Total Respondents: 818

Figure 14: Survey Responses: Recreational Activities

ANSWER CHOICES	RESPONSES	
BMX	16.87%	138
Bush walking	45.97%	376
Cycle speedway	1.96%	16
Cyclo-cross	11.61%	95
Endurance running	8.92%	73
Enduro (motorcycle sport)	10.02%	82
Four-wheel driving	29.83%	244
Fun run events	11.37%	93
General bicycle riding	53.30%	436
General motorbike riding	16.87%	138

© Breakaway Tourism | Feasibility Study | Bindoon Mountain Bike and Adventure Park

Question 6

Q. Do you or any members of your family, club, school or group participate in mountain bike riding activities? (please select all that apply)

A. The majority of respondents 49.01% (396) participate in mountain biking with family. The survey also identified 10.15% (82) do not (yet) participate in mountain biking activities.

Answered: 808   Skipped: 16

Answer	Percentage
No participation	10.15%
Family	49.01%
School	2.48%
Club	9.28%
Group	21.53%
Other (please specify)	7.55%

ANSWER CHOICES	RESPONSES	
No participation	10.15%	82
Family	49.01%	396
School	2.48%	20
Club	9.28%	75
Group	21.53%	174
Other (please specify)	7.55%	61
TOTAL		808
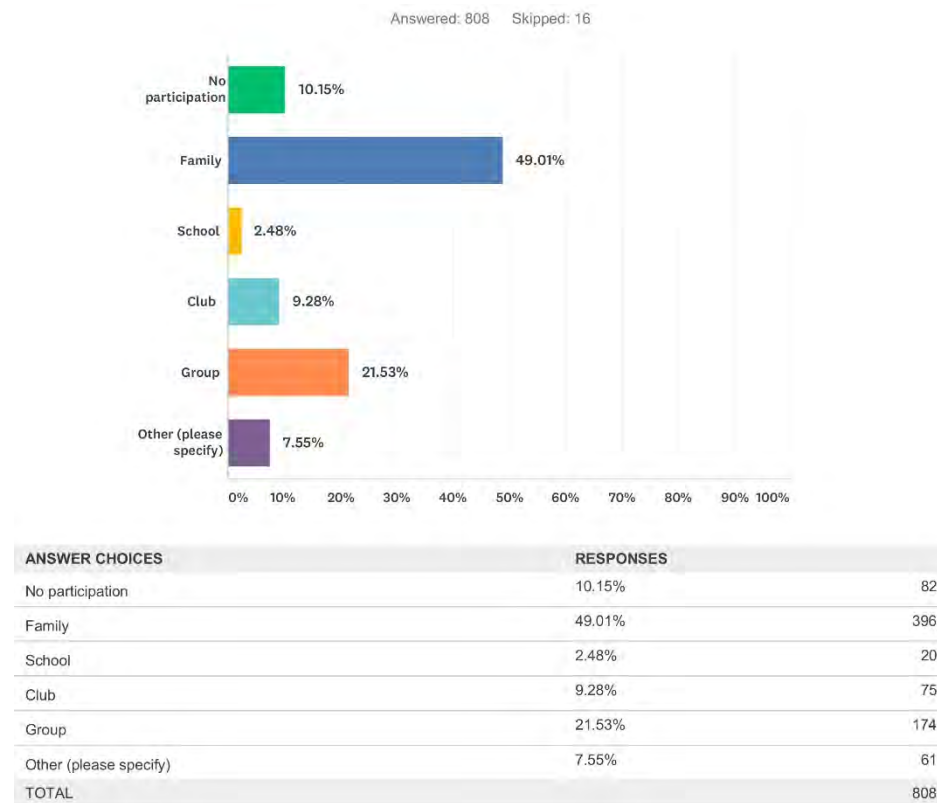
Figure 15: Survey Responses: Participation Groups

Question 7

Q. Have you or members of your family participated in any of the following mountain bike riding activities? (please select all that apply)

A. General mountain bike riding 83.79% (677) was the most popular response followed by downhill trails 57.55% (465); cross country mountain biking (including cyclocross, CX, CCX, cyclo-x) 50.99% (412); freeride trails (technical riding) 50.00% (404); and pump tracks 46.66% (377).

Additional activities identified by respondents (not specifically featured in the survey) included for example: adaptive mountain biking, enduro mountain biking, MTB orienteering, cycling wine tours, mountain biking travel, and BMX.

Answered: 808   Skipped: 16

Activity	Percentage
Cross country mountain bik...	50.99%
Cycle speedway	0.74%
Dirt jumping	27.60%
Downhill trails	57.55%
General mountain bik...	83.79%
Freeride trails...	50.00%
Mountain bike tours / travel	33.42%
Pump tracks	46.66%
Slopestyle (descent-foc...	18.56%
Touring (long distance)	17.57%
Urban mountain bike parks...	27.23%
No participation	6.56%
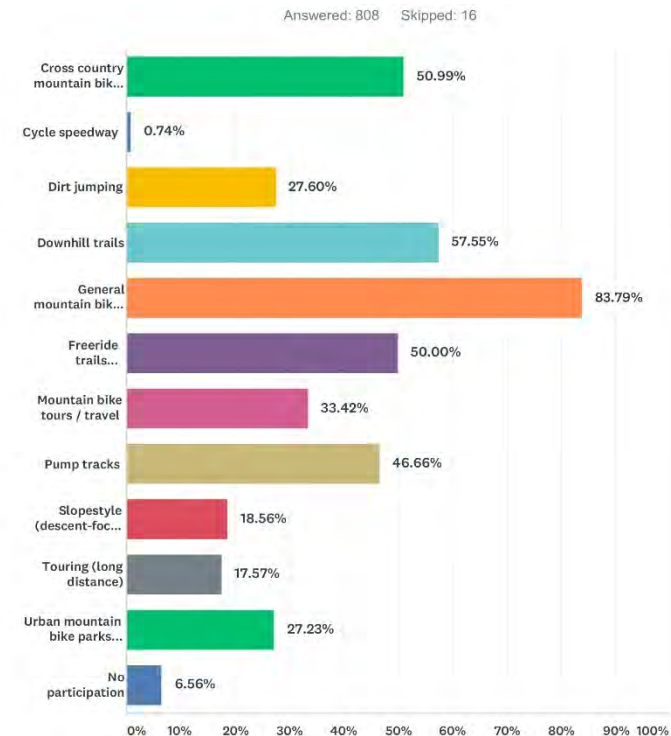
ANSWER CHOICES	RESPONSES	
Cross country mountain biking (includes cyclocross, CX, CCX, cyclo-x)	50.99%	412
Cycle speedway	0.74%	6
Dirt jumping	27.60%	223
Downhill trails	57.55%	465
General mountain bike riding	83.79%	677
Freeride trails (technical riding)	50.00%	404
Mountain bike tours / travel	33.42%	270
Pump tracks	46.66%	377
Slopestyle (descent-focussed) tracks	18.56%	150
Touring (long distance)	17.57%	142
Urban mountain bike parks (small metro parks)	27.23%	220
No participation	6.56%	53
Total Respondents: 808		

Figure 16: Survey Responses: Mountain Biking Activites

Question 8

Q. If you were to visit a Mountain Bike Park, what level/s (or classifications) of mountain bike trails would you be interested in? (please select all that apply)

A. 'Moderate' 82.18% (664) and 'Difficult' 76.24% (616) level mountain bike trails were overwhelmingly of most interest to the respondents.

118 recommendations for specific trail features were also provided by respondents. Examples include: mix of trails (hand built, machine built, natural) with mix of terrains and technical features; adaptive MTB trails; gravity enduro trails; flow trails; wooden features; technical features that can be rolled or bypassed; berms, tabletops, wall rides and catwalks (elevated trails); rocks; stacked loop trails with A & B lines; progressive jump lines; slalom track; skills park; pump track; easy trails for children; safe viewing areas for non-participants; uplift service; and chairlift.

Answered: 808   Skipped: 16
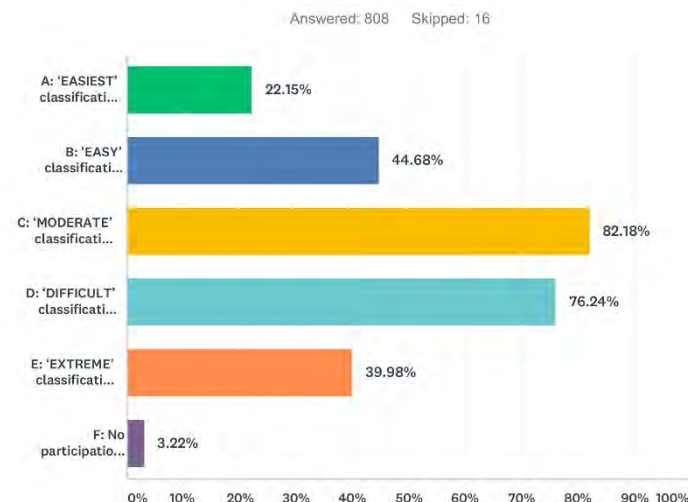
ANSWER CHOICES	RESPONSES	
A: 'EASIEST' classification trail (beginner or novice cyclists with basic bike skills)	22.15%	179
B: 'EASY' classification trail (beginner or novice mountain bikers with basic mountain bike skills)	44.68%	361
C: 'MODERATE' classification trail (Intermediate mountain bikers with some technical skills)	82.18%	664
D: 'DIFFICULT' classification trail (experienced mountain bikers with good technical skills)	76.24%	616
E: 'EXTREME' classification trail (very experienced mountain bikers with a high level of technical skills)	39.98%	323
F: No participation / spectator only	3.22%	26
Total Respondents: 808		

Figure 17: Mountain Bike Trail Types / Features

Question 9

Q. Do you or members of your family participate in any mountain bike riding or cycling competitions or events?

A. 57.05% (461) of respondents said they (or family members) participate in mountain biking or cycling competitions or events.

Examples of competitions and events have been identified below.

Disciplines such as:

- Adaptive mountain biking *(triathlon, handcycle community/social rides, Break the Boundary adaptive mountain biking events)*
- Adventure racing
- BMX
- Criterium racing
- Cross country MTB (XC)
- Cross country road cycling (XC)
- Dirt jump competitions
- Enduro cross country
- Gravity enduro (GE)
- Junior racing
- Marathon (XCM)
- MTB club racing
- MTB Orienteering
- School club racing
- Sportive (cyclosportive)
- Triathlon

Events such as:

- Absa Cape Epic
- BC Bike Race
- Cape 2 Cape
- Dusk till Dawn
- Dwellingup 100
- Gibb River Road MTB Challenge
- Gran Fondo
- Joburg2C
- Karri Cup
- Life Cycle for Canteen
- Margaret River Muster
- Middle Earth Epic Orc Hunt
- Numbat Cup
- Perth Trail Series
- Seven
- State and national title events
- The Pioneer
- Track cycling

Answered: 808   Skipped: 16

| No | 43.32% |
| Yes (please advise the t... | 57.05% |
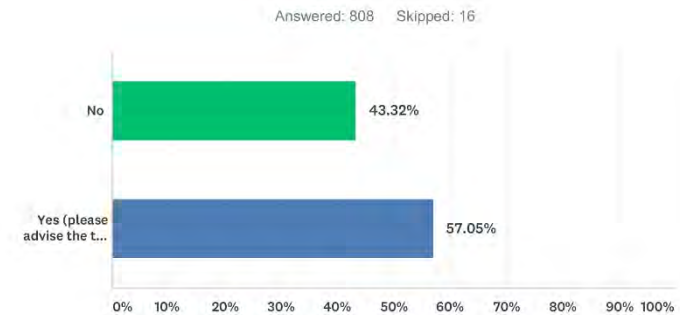
ANSWER CHOICES	RESPONSES	
No	43.32%	350
Yes (please advise the type of competition or event in the comment box below)	57.05%	461
Total Respondents: 808		

Figure 18: Survey Responses: MTB and Cycling Competitions and Events

Question 10

Q. On average, how often do you, or members of your family go on a recreational bike ride?

A. The most common responses were 'every week' 46.58% (375); 'most days' 24.84% (200); and 'once or twice per month' 17.76% (143).

Answered: 805   Skipped: 19
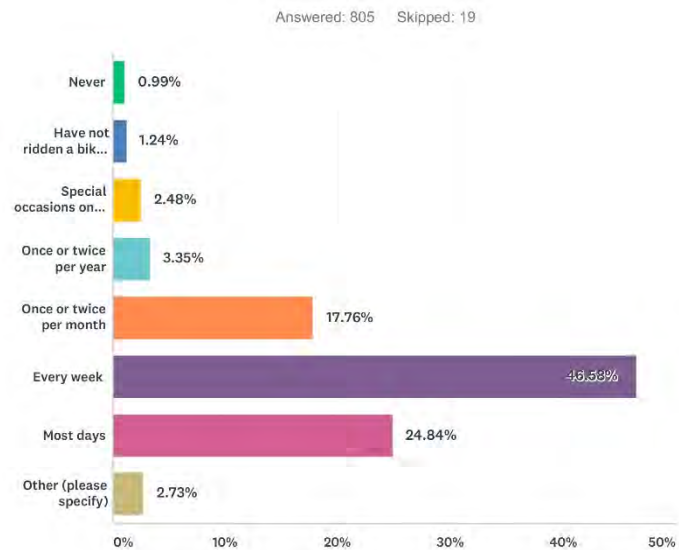
ANSWER CHOICES	RESPONSES	
Never	0.99%	8
Have not ridden a bike in many years	1.24%	10
Special occasions only e.g. excursions, tours or travel destinations	2.48%	20
Once or twice per year	3.35%	27
Once or twice per month	17.76%	143
Every week	46.58%	375
Most days	24.84%	200
Other (please specify)	2.73%	22
TOTAL		805

Figure 19: Survey Responses: Recreational Bike Ride Frequency

Question 11

Q. How do you usually travel for recreational activities?

A. Most respondents travel with friends (65.99% (522) followed by family groups 39.95% (316); alone 36.28% (287); as a couple 27.43% (217); with groups/clubs 15.55% (123)

Answered: 791   Skipped: 33
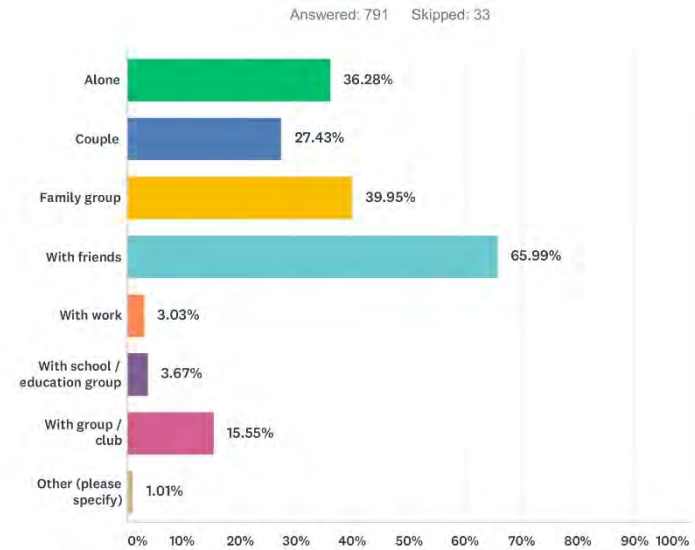
ANSWER CHOICES	RESPONSES	
Alone	36.28%	287
Couple	27.43%	217
Family group	39.95%	316
With friends	65.99%	522
With work	3.03%	24
With school / education group	3.67%	29
With group / club	15.55%	123
Other (please specify)	1.01%	8
Total Respondents: 791		

Figure 20: Recreational Travel Methods

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Question 12

Q. What types of facilities and services would you like to see at a commercial Mountain Bike Park attraction? (please select all that apply)

A. The top 5 responses included: mountain bike trails 95.83% (758); café/kiosk 70.16% (555); barbecue/picnic facilities; 60.94% (482); bike wash station 60.18% (476); and shaded areas 53.48% (423)

In addition to options provided in the survey, a strong recommendation for toilets came through including the following examples for consideration:

- Accessible toilets and accommodation
- Accommodation options
- Bike shop
- Brewery
- Car parking
- Caravan and camping sites
- Chairlift
- Clean and safe toilets and car parking

- Foam pit / air bag landing
- Night riding
- Parking space for trailers
- Pub / bar
- Showers
- Shuttle bus
- Toilets
- Uplift service

Answered: 791   Skipped: 33

Category	Percentage
Mountain bike trails	95.83%
Urban mountain bike obstacl...	
Adaptive mountain bik...	21.87%
Urban mountain bike obstacl...	31.61%
Walking trails	33.25%
Climbing walls	16.69%
Orienteering activities	8.98%
Outdoor recreation t...	9.99%
BMX track	21.62%
Skate park	11.38%
Mountain bike lessons and...	45.76%
Tour guided riding...	14.66%
Aboriginal cultural...	13.40%
Equipment hire e.g. bikes,...	37.29%
Bike repairs, servicing an...	44.25%
Bike wash station	60.18%
Bike secure storage stat...	21.62%
Retail / merchandise...	25.92%
Café / kiosk	70.16%
Corporate, clubs and...	9.10%

ANSWER CHOICES	RESPONSES	
Mountain bike trails	95.83%	758
Urban mountain bike obstacle track	0.00%	0
Adaptive mountain bike trails/facilities (e.g. hand cycling)	21.87%	173
Urban mountain bike obstacle track	31.61%	250
Walking trails	33.25%	263
Climbing walls	16.69%	132
Orienteering activities	8.98%	71
Outdoor recreation team building & personal development activities	9.99%	79
BMX track	21.62%	171
Skate park	11.38%	90
Mountain bike lessons and technical skills tuition	45.76%	362
Tour guided riding experiences	14.66%	116
Aboriginal cultural walks/experiences	13.40%	106
Equipment hire e.g. bikes, helmets, safety gear etc.	37.29%	295
Bike repairs, servicing and parts	44.25%	350
Bike wash station	60.18%	476
Bike secure storage station	21.62%	171
Retail / merchandise outlet	25.92%	205
Café / kiosk	70.16%	555
Corporate, clubs and travel groups activities and catering	9.10%	72
Kids parties activities and catering	9.48%	75
School excursion programs and catering	16.18%	128
Gift vouchers	6.57%	52
Mountain bike club and club house	27.18%	215
Function room	8.98%	71
Events	35.02%	277
Competitions	39.82%	315
Caravan and camping sites	42.35%	335
Accommodation (e.g. cabins)	23.51%	186
Barbecue / picnic facilities	60.94%	482
Children's playground	28.70%	227
Shaded areas	53.48%	423
WIFI	23.77%	188
Total Respondents: 791		

Figure 21: Survey Responses: Facilities and Amenities

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Question 13

Q. How long is the maximum amount of time you would travel from your place of residence to experience a Mountain Bike Park?

A. 14.55% (354) respondents said they would travel more than 2 hours to experience a mountain bike park demonstrating that mountain bikers are happy to travel for a quality mountain biking experience.
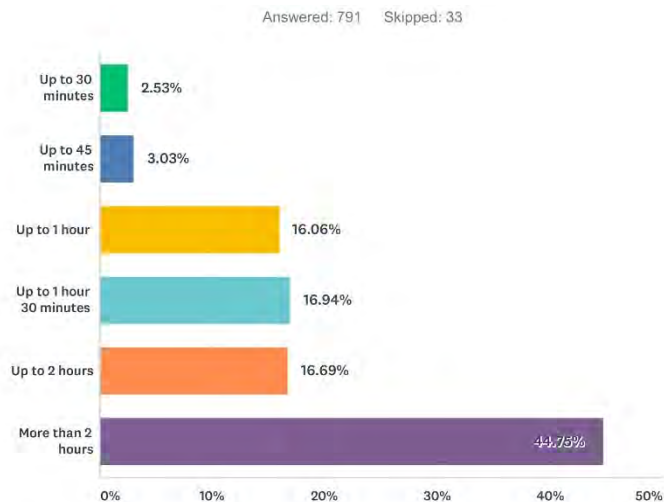
ANSWER CHOICES	RESPONSES	
Up to 30 minutes	2.53%	20
Up to 45 minutes	3.03%	24
Up to 1 hour	16.06%	127
Up to 1 hour 30 minutes	16.94%	134
Up to 2 hours	16.69%	132
More than 2 hours	44.75%	354
TOTAL		791

Figure 22: Survey Responses: Travel Time for Mountain Biking

Question 14

Q. How would you most likely book a day pass, multi-day pass or season pass / ticket to an attraction or activity? e.g. amusement park, tourist attraction etc.

A. The preferred method of booking entry to an attraction or activity was online directly via the attraction/activity company website 77.75% (615) and other online methods such as third-party websites and social media pages however 47.28% (324) respondents said they would book tickets at the gate.
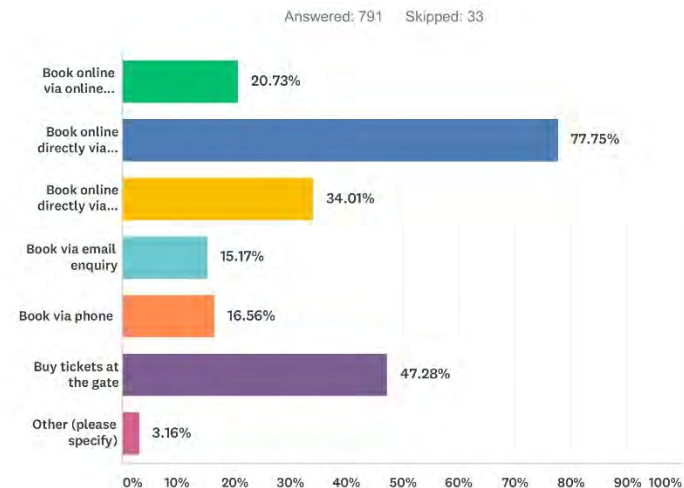
ANSWER CHOICES	RESPONSES	
Book online via online travel/activities website e.g. Expedia, Viator, Sightseeing Pass Australia etc.	20.73%	164
Book online directly via attraction/activity company website	77.75%	615
Book online directly via attraction/activity company social media page	34.01%	269
Book via email enquiry	15.17%	120
Book via phone	16.56%	131
Buy tickets at the gate	47.28%	374
Other (please specify)	3.16%	25
Total Respondents: 791		

Figure 23: Survey Responses: Preferred Booking Method

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Question 15

*Q. How much would you expect to pay for an Adult Day Pass at a commercial Mountain Bike Park? (*Note: daily rate would be reduced for children, concession, family and group booking day passes, multiday passes and seasonal passes)*

A. Factoring in the predictability of survey respondents to be most likely to select the cheapest price of an entry ticket as $10-15 per day 38.81% (307), cost expectations lowered as the prices increased: $15-25 per day 28.82% (228); and $25-35 per day 19.34% (153).

Interestingly an additional 148 comments to this response demonstrated the following common attitudes to cost:

- Price entirely depends on quality of trails and whether shuttles are included

- Many would consider paying extra for mountain bike park with a shuttle, uplift or chairlift service. Prices of $50-75 quoted for shuttle service inclusion

- Free or discounted admission for Shire of Chittering residents

- Would prefer to pay year pass e.g. Annual Family Pass

- Would not want to pay any entry fee as there are free trails in Kalamunda and the south west

Answered: 791   Skipped: 33
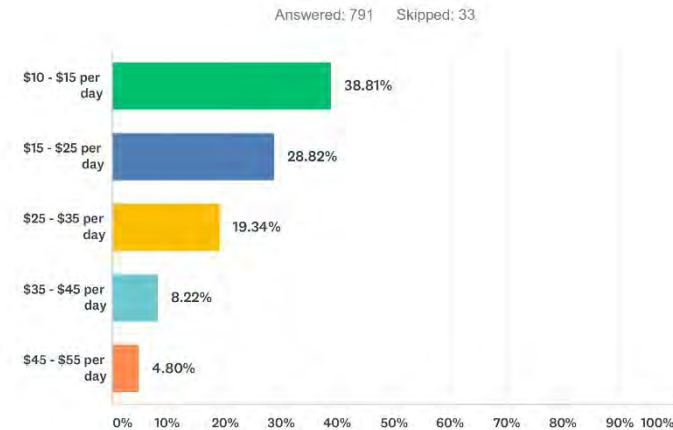
ANSWER CHOICES	RESPONSES	
$10 - $15 per day	38.81%	307
$15 - $25 per day	28.82%	228
$25 - $35 per day	19.34%	153
$35 - $45 per day	8.22%	65
$45 - $55 per day	4.80%	38
TOTAL		791

Figure 24: Survey Responses: Entry Fee Expectations

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Question 16

Q. How often would you, your family or group potentially visit a Mountain Bike Park in Bindoon?

A. The majority of respondents said they would visit a mountain bike park monthly 42.60% (337), followed by a few times a year 39.06% (337); and weekly 12.64% (100).

Assuming the majority of customers would visit a mountain bike park on the weekend, this further demonstrates the need to diversify activities and target markets at the park to attract midweek markets (e.g. training camps, schools, tour groups, corporate team building, community groups, mothers' groups).

Answered: 791   Skipped: 33

ANSWER CHOICES	RESPONSES	
Weekly	12.64%	100
Monthly	42.60%	337
A few times a year	39.06%	309
Once a year	1.90%	15
Just for a special occasion, event or excursion	2.78%	22
Never	1.01%	8
TOTAL		791
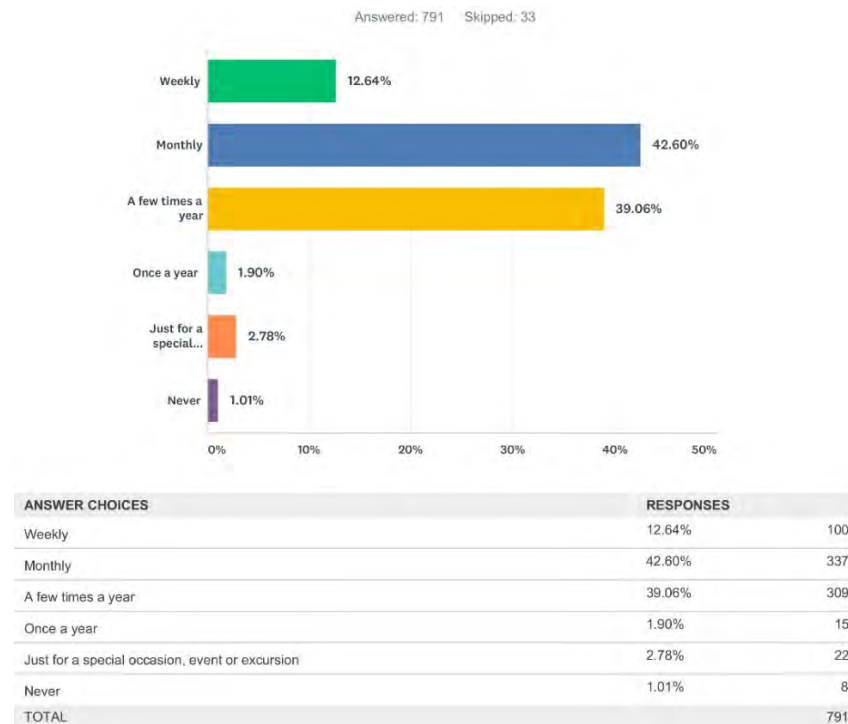
Figure 25: Survey Responses: Bindoon Mountain Bike Park Visitation

Question 17

Q. On which day/s of the week would you prefer to visit a Mountain Bike Park in Bindoon? *(please select all that apply)*

A. Unsurprisingly, the majority of respondents said they would visit a mountain bike park on a weekend, Sunday 89.38% (707) and Saturday 88.5% (700) respectively. The lowest interest day of the week was Tuesday 17.95% (42)

Answered: 791   Skipped: 33
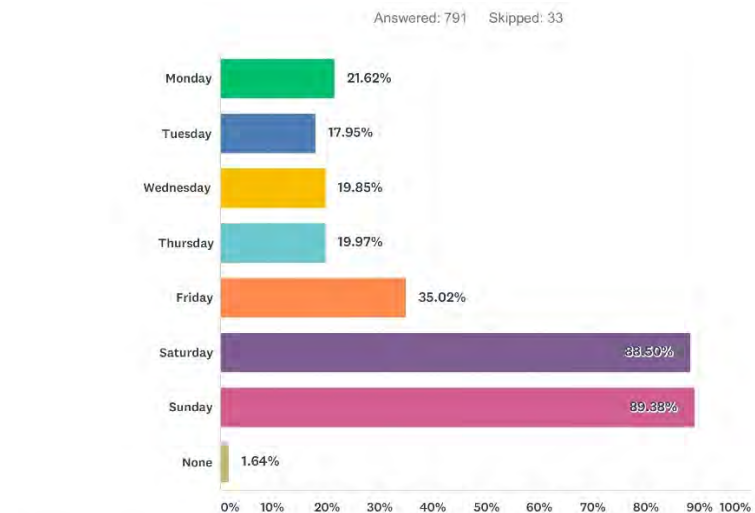
ANSWER CHOICES	RESPONSES	
Monday	21.62%	171
Tuesday	17.95%	142
Wednesday	19.85%	157
Thursday	19.97%	158
Friday	35.02%	277
Saturday	88.50%	700
Sunday	89.38%	707
None	1.64%	13
Total Respondents: 791		

Figure 26: Survey Responses: Visitation Days

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Question 18

Q. What time of the year would you most likely visit a Mountain Bike Park in Bindoon? (please select all that apply)

A. Most respondents said they would most likely visit a mountain bike park in Bindoon year-round 67.26% (532) however the least likely time of year to visit was January to March 4.05% (32) demonstrating the need for the development of summer visitation strategies incorporated in the design, facilities, operation and marketing of the park.

ANSWER CHOICES	RESPONSES	
All year round	67.26%	532
January - March	4.05%	32
April - June	29.84%	236
July - September	28.32%	224
October - December	13.53%	107
None	1.01%	8
Total Respondents: 791		
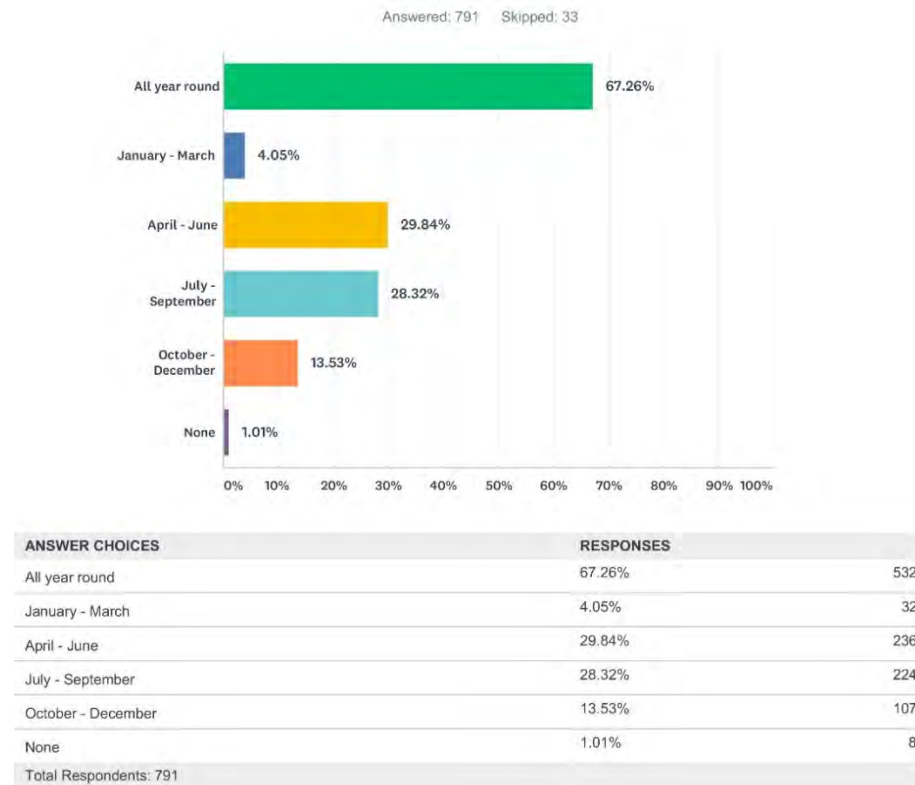
Figure 27: Survey Responses: Time of Year Visitation

Question 19

Q. Would you consider a Mountain Bike Park attraction as a destination for schools, tour companies, groups, corporates, clubs etc. for excursions and activities if the right amenities were provided?

A. Of the respondents who travel in formal groups, 64.60% (511) of respondents said 'yes' they would consider a mountain bike park for excursions, camps and activities if the right amenities were provided and 7.46% (59) said they would not.

ANSWER CHOICES	RESPONSES	
Not applicable	27.94%	221
Yes	64.60%	511
No	7.46%	59
TOTAL		791
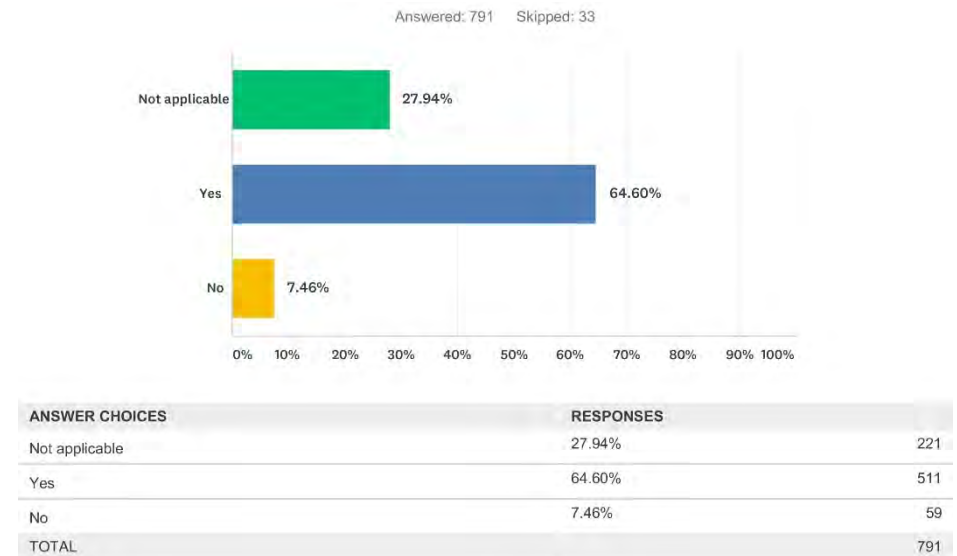
Figure 28: Survey Responses: Group Excursions and Activities

Question 20

Q. If your answer to the previous question was 'Yes', approximately how many people would be in your group/s? (please estimate by providing a number in the comment field below)

A. Of the 437 recommendations received by respondents, an overview of group size estimates is provided in the chart below. *Note: some responses (16) did not include any numbers so have not been included.
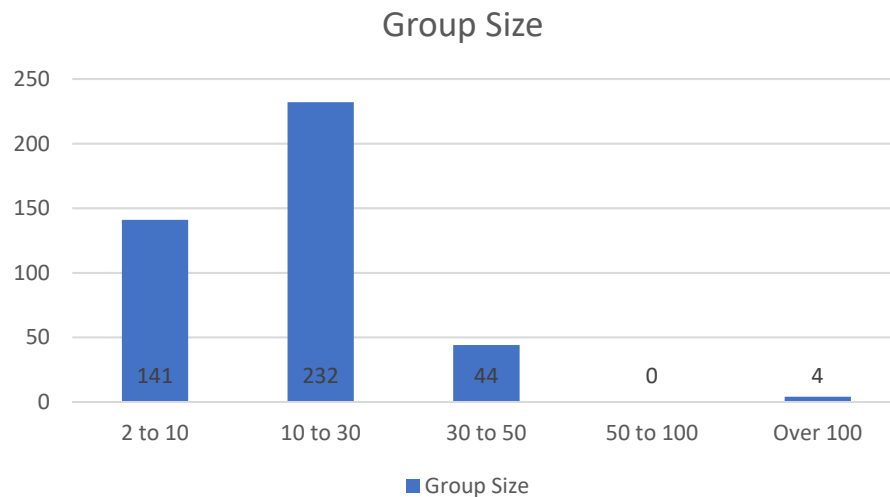
Figure 29: Survey Responses: Group Size

Question 21

Q. Which social media channels do you subscribe to? (please select all that apply)

A. The most popular social media channel used by respondents by far was Facebook 91.86% (722); followed by Instagram 61.83% (486); and You Tube 50.51% (397).

ANSWER CHOICES	RESPONSES	
I do not use social media	4.07%	32
Facebook	91.86%	722
Twitter	10.18%	80
Instagram	61.83%	486
You Tube	50.51%	397
Tumblr	0.51%	4
Google+	9.29%	73
LinkedIn	22.77%	179
Pinterest	7.38%	58
Snapchat	20.36%	160
WeChat	1.27%	10
Total Respondents: 786		
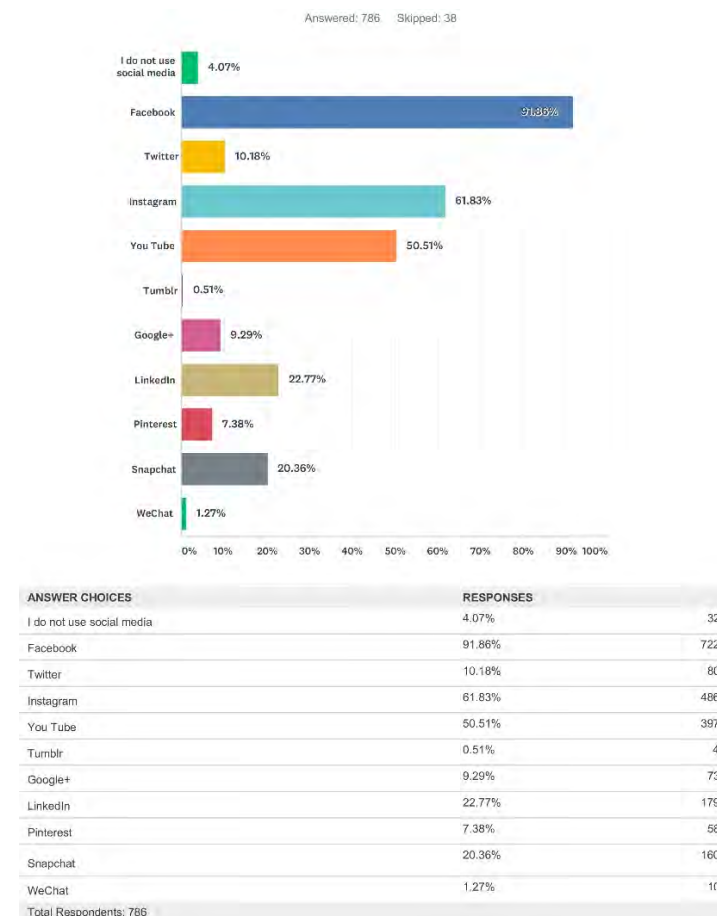
Figure 30: Survey Responses: Social Media Usage

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Question 22

Q. You may be interested in the proposed Bindoon Mountain Bike Park as one or more of the following: (please select all that apply)

A. As expected, the majority of survey respondents identified as mountain bikers 89.82% (706) and a further 47.84% (376) identified themselves as outdoor recreation enthusiasts. *Note: potential sponsors (24); investors (27); and co-located attractions/activities (27). Examples of further comments included: disabled rider looking for accessible places to ride; trail walker; mountain bike coach; photographer; spectator (grandparent); and charity group.
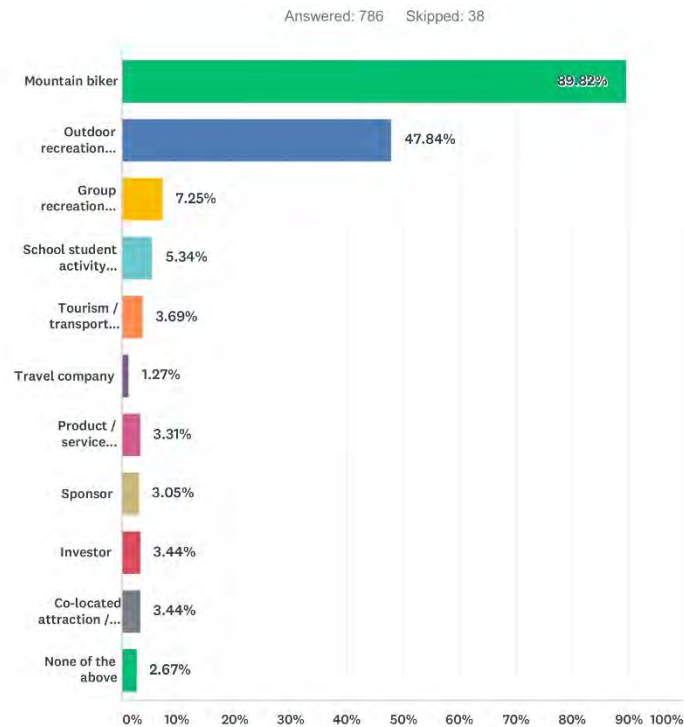
ANSWER CHOICES	RESPONSES	
Mountain biker	89.82%	706
Outdoor recreation enthusiast	47.84%	376
Group recreation activity organiser	7.25%	57
School student activity organiser	5.34%	42
Tourism / transport operator	3.69%	29
Travel company	1.27%	10
Product / service supplier	3.31%	26
Sponsor	3.05%	24
Investor	3.44%	27
Co-located attraction / activity	3.44%	27
None of the above	2.67%	21
Total Respondents: 786		

Figure 31: Survey Responses: User Types

Question 23

Q. If you have any further recommendations, questions or concerns regarding the development of a Mountain Bike Park in Bindoon, please insert your comments here.

A. 158 separate recommendations were provided by respondents. These consisted mostly of support and excitement for the proposed project. Other common themes included:

- Ensure high quality trails and facilities if operating as a commercial park
- Ensure trails cater for advanced riders
- Include adaptive mountain biking capacity and accessible amenities in the design, prior to development
- Accommodation and hospitality must be available
- Ample parking
- Uplift service

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Question 24

Q. Please confirm your interest

A. 423 respondents provided their contact details to register for further information and news of the project in due course.

This information may be used to establish a dedicated consumer database to conduct for future marketing, research and sales for the Shire of Chittering and the proposed Bindoon Mountain Bike and Adventure Park

Answered: 752   Skipped: 72
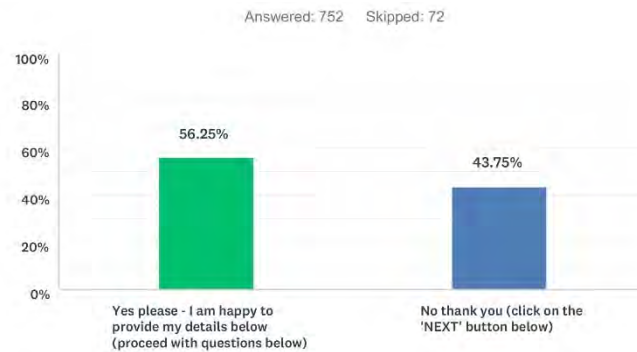
ANSWER CHOICES	RESPONSES	
Yes please - I am happy to provide my details below (proceed with questions below)	56.25%	423
No thank you (click on the 'NEXT' button below)	43.75%	329
TOTAL		752

Figure 32: Survey Responses: Confirm Your Interest

Questions 25 to 28

Q 25. Supply your first name

Q 26. Supply you surname

Q 27. Supply your company name (if relevant)

Q 28. Supply your email address.

A. 423 respondents provided their contact details.

A full copy of the survey with full results and hundreds of recommendations by survey respondents has been provided to the Shire of Chittering as an Electronic Attachment.

See Electronic Attachment 1: Proposed Bindoon Mountain Bike Park Survey Responses

 Note Attachment is 131 pages

Destination Awareness & Database Development

A positive outcome of the Breakaway Tourism email campaign, survey and consultation process to date has resulted in an increased awareness of Bindoon and the Shire of Chittering as a prospective tourism and recreational destination. This also reflects positively on the Shire of Chittering as a proactive Shire open to innovation, investment, growth of the local economy, tourism and recreational activities.

A database of 1,621 contacts has been developed throughout the course of the project to date for future use by the Shire should future marketing or consumer engagement be required.

1. **Stakeholder Database**

   This new database of 327 contacts will be in addition to the original survey distribution database of Shire of Chittering community stakeholders and key mountain bike, recreation and tourism sector representatives that has evolved throughout the consultation process (includes contact names, business/org details, email addresses, websites, phone numbers and social media handles).

2. **Consumer Database**

   A new consumer database of 435 new names and email addresses (with permission to do so from 56.25% of total survey respondents) has been extracted from the survey.

3. **Schools Database**

   A new database of 860 schools (potential target market for

educational groups participating in outdoor recreation programs involving mountain biking, trails walking, orienteering etc), in the Greater Perth Metropolitan Region and Shire of Chittering Surrounds has been developed.

Note: Original database of 1,016 reduced to 860 following removal of 156 email addresses no longer in operation or unsubscribed via the Mailchimp email invitation to participate in the survey

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Section 7:

Shire of Chittering
Tourism & Recreation Product
Review

Figure 33: Image courtesy, Tourism WA

7. Shire of Chittering Tourism & Recreation Product Review

A review and update of audits previously commissioned by the Shire of Chittering has been undertaken to assess current tourism and recreation affiliated products and services that may impact on the appeal, market diversification and ongoing sustainability of a mountain bike and adventure park in Bindoon.

Tourism and Recreation Product Audit 2019

Tourism and Recreation Product Audit		
Tourist and Recreation Attractions	**Location**	**Overview**
Bindoon Op Shop	Bindoon	Second-hand clothing, furniture, bric-a-brac, kitchen and household goods
Brockman Precinct & Bindoon Museum • **Bindoon Heritage Museum** • **Art & Crafts Gift Shop** • **Bindoon Men's Shed** • **Chittering Road Board**	Bindoon	• Bindoon Heritage Museum - farm machinery, vintage vehicles, historic household items and tools (Bindoon Historical Society) • Art & Crafts Shop (Bindoon Arts and Craft Group) • Bindoon Men's Shed – build furniture for sales at local events • Chittering Road Board building – heritage site
Chinkabee Complex	Bindoon	Sports complex: bowling greens, tennis, basketball, netball, club facilities *Complementary Product to MTB Park*
Chittering Acres	Chittering	Farm, outdoor camping accommodation, art studio, garden art display, scenic views, WOOFing (Willing Workers on Organic Farms)
Chittering Valley Tours	Lower Chittering	Group tour operator specialising in local farm properties, bush wineries and getting closer to nature *Potential tour services for MTB Park Groups*
Chittering Visitor Centre	Bindoon	Chittering Tourist Association, visitor information

Tourism and Recreation Product Audit

Clune Park	Bindoon	Community park, mountain bike / BMX jump track (approx. 0.3 Ha), skate park, basketball ring, BMX track, playground, bbq/picnic area and the Stonehouse Trail - 2km lakeside walking trail (4km return) *Complementary Product to MTB Park – signage opportunity*
Enderslea Farm	Chittering	Historical homestead/property, historical presentations, events, plays/performances
Golden Grove Observatory	Lower Chittering	Private astronomy observing site of the Astronomical Group of Western Australia (AGWA)
GPS Adventure Tours	Chittering Valley	Tour from Perth featuring Chittering Valley: Swan Valley, Blackboy Ridge, BBQ dinner, stargazing at Enderslea Farm
John Glenn Park - Muchea Jump Track	Muchea	Mountain bike / BMX jump track (approx. 25 Ha), playground, picnic area, toilets *Complementary Product to MTB Park – signage opportunity*
Holy Trinity Church	Bindoon	Historical old stone Anglican church built in the late 1800's
Maryville Downs Dirt Jumps	Lower Chittering	Sussex Bend Recreation Reserve, mountain bike / BMX dirt jumps park *Complementary Product to MTB Park – signage opportunity*
Moondyne Country Convention Centre	Lower Chittering	Conference/function facilities, 1,800 acre property, cottage and chalet accommodation
Muchea Tree Farm	Muchea	Specialising in West Australian native plants, Proteas and farm trees
Sandown Park Equestrian Facility	Muchea	Equestrian park, polocrosse competition and events
Natural Attractions	**Location**	**Overview**
Birdwatching	Various	State Forest, lakes, bushland and walking trails
Blackboy Ridge	Lower Chittering	1.5km bushwalking trail, wildflower, scenic views, look-out
Julimar State Forest	Julimar	State Forest, 4WD tracks, bushwalking
Lake Chittering	Bindoon	Crown owned but only accessible via private property landowner permission, Landcare permitted to conduct scheduled Kayak Nature Tours, birdwatching *Opportunity to be Hero Product if public access is negotiated with local landowners (or similar activities at other suitable location)*
Lake Needoonga	Bindoon	Lake, 600m lakeside walking trail, flora and fauna watching, barbecue/picnic area, toilets
Nature-based Photography	Various	State Forest, lakes, bushland and walking trails, birdwatching
Spoonbill Lake	Bindoon	Picnic ground
Trail Running	Shire of Chittering	Trail running on dedicated walking and hiking trails throughout the Shire of Chittering
Wildflowers	Bindoon	Gateway to wildflower country in the wheatbelt (August-September)
Trails	**Location**	**Overview**

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Tourism and Recreation Product Audit

Self-Drive, Walking and Hiking Trails around Bindoon	Bindoon	*Complementary Product to MTB Park*
Bindoon Tale Trail	Bindoon	1.8km loop trail through the Bindoon townsite that shares community stories
Blackboy Ridge Trail	Lower Chittering	1.5km walking trail, lookout, picnic area, toilets
Camino Salvado Pilgrim Trail	Chittering Valley & Bindoon	145km trail commencing Salvado Road, Subiaco (St Joseph's Church), to New Norcia. Includes Chittering Valley and Bindoon
Carty Reserve Trail	Bindoon	600m walking trail through rehabilitated land
Chittering Farm Flavour Trail	Shire of Chittering	Established WA Food & Wine Trails publication featuring Treetops Guesthouse, Stringybark Winery Restaurant, Nesci Estate Wine Farm, Blueberry Bliss; Oversby's Citrus, Wootra Farm, Green Valley Fruits, Little Eeden Farm, Avalon Farm, and Local Goat *Hero Product*
Discover Golden Horizons Drive Trail	Shires of Bindoon, Calingiri, Dalwallinu, Moora, New Norcia & Wongan Hills	Collaborative marketing self-drive brand promoting self-drive travel to experience wildflowers, getting back to nature, from paddock to plate, art and heritage, and 1, 2 and 3-day travel itineraries
Eat, Pick, Grow Trail — Wanneroo and Chittering	Shire of Chittering	Trails WA half day self-drive food and wine trail
Lake Needonga Trail	Bindoon	600m lakeside walking trail
Peace Be Still Trails	Lower Chittering	Private retreat, guest house, day visitors, featuring a variety of trails across a large property (across 3 Local Government Areas): Avon Valley Walk Trail (7.1km), Valley Views (9.6km), Out & Back (6.5km), Special valley (30min), Ridgetop Circle (2hr), Harry Butler Trail (20min), Stations of the Cross (1hr), Labyrinth (20min), River Camp to Avon River (4hr), and Joes Territory Walks x 4 (9.5km, 10.9km, 16.4km, 13.5km)
Spoonbill Lake Trail	Upper Chittering	1,6km lakeside walking trail, picnic area
Stonehouse Trail	Bindoon	2km lakeside walking trail (4km return) at Clune park, skate park, basketball ring, BMX track, playground, bbq and picnic area
Wannamal Heritage Trail	Wannamal	75min loop walking trail highlighting historical sites, rest area
Wheatbelt Science Trail	Wheatbelt Region	Geo trail, science trail, geocaching (online treasure hunt) – Shire of Chittering site located at Blackboy Ridge
Wildflower Drive Trail	Shire of Chittering	Wildflower drive across the Shire of Chittering
Food, Beverage and Culinary Product	**Location**	**Overview**
14k Brewery (in development)	Muchea	Craft beer brewery in development - currently featuring product at events and festivals
Apricot Acres Farm	Brockman River	Wholesale orchard, oranges, mandarins, plums, currants, fruit picking

Tourism and Recreation Product Audit

Bindoon Bakehaus	Bindoon	Bakery, café, function venue, catering, providore, giftware *Current #1 Hero Product*
Bindoon Estate Winery Retail Sales	Bindoon	Wine sales – market stalls and Bindoon General Store
Bindoon Farmers Market	Bindoon	Monthly farmers market, fresh food and produce
Bindoon Restaurant, Bar, Café (also known as Mediterranean Café & Restaurant)	Bindoon	Mediterranean restaurant, bar, café, catering, kids play area
Blueberry Bliss Bindoon	Bindoon	Blueberry orchard / farmgate sales
Glenowen Winery Retail Sales	Bindoon	Wine sales – market stalls
Golden Grove Citrus Orchard	Lower Chittering	Orchard, Devonshire teas (Apr-Nov), orchard picking tours (group bookings), enclosed barbecue/dining area for hire
Green Valley Fruits	Mooliabeenee	Organic fruit and vegetable sales
Kyotmunga Estate	Lower Chittering	Winery, orchard
Little Eeden Farm	Mooliabeenee	Honey farm, apiary, honey product sales and display
Nesci Estate Wine Farm	Lower Chittering	Winery and vineyard
Outback Brewing Company	Chittering	Craft beer, apple cider, ginger beer producers (wholesale only – not open to public)
Oversby's Citrus	Bindoon	Farm gate sales
Scottalian Bindoon Hotel	Bindoon	Licensed tavern, restaurant, entertainment, events, beer garden, pool tables
Stringybark Winery & Restaurant	Chittering	Winery, cellar door, craft beers, restaurant, function centre, events, entertainment
Wootra Farm	Bindoon	Asparagus, fruits, jams, chutney and market sales

Events	Location	Overview
Bindoon Agricultural Show and Rodeo	Bindoon	Annual - October: Agricultural show, rodeo, local produce, exhibitions, family activities, entertainment etc.
Bindoon Farmers Market	Bindoon	Monthly (Feb-Dec): Farmers market, fresh food and produce
Bindoon Historic Vehicle Day	Bindoon	Annual - September: Vintage vehicles, market stalls, entertainment
Chittering Spring Festival	Chittering	Annual - August to September dates: wildflower walks, art exhibitions, quilt and floral displays, craft
Chittering Veteran Car Day	Lower Chittering	Annual - November: Veteran car show, family activities, food, market stalls, entertainment
Landcare Wildflower Expo	Muchea	Annual - September weekend: Wildflower display and family fun day
Mango Festival	Bindoon	Annual - March: Mango season celebration, Bindoon Primary School kids' activities

Tourism and Recreation Product Audit

Market Day in Chittering	Lower Chittering	Annual - May: Festival of wine tasting, local produce, market stalls, food trucks, entertainment
Swagfest	Bindoon	Annual - April: Brockman Centre Bindoon, art and heritage festival
Targa West Rally	Lower Chittering	Annual - August: Tarmac Rally, classic and exotic vehicles competition
Wear Ya Wellies	Bindoon	Annual - May: Family fun day, muddy fun, outdoor play, kids' gardening, craft, market and food stalls

Accommodation, Caravan & Camping	Location	Overview
Alan and Eve's Eden	Lower Chittering	Holiday rental house, bed and breakfast
Billy's Farm	Lower Chittering	Farm stay and country house with private guestroom for 2 x guests
Bindoon Oval	Bindoon	Oval available for caravan clubs
Bindoon Transit Park	Bindoon	6 powered bays with water, ablutions, dump point
Bindoon Valley Escape	Bindoon	Self-contained cottage
Bindoon's Windmill Farm	Bindoon	Accommodation, farm stay, breakfast, conference/training facility
Buddha Mandala Monastery	Chittering	Monastery, Buddha Mandala Monastery Retreat Centre, Nalanda Society *Members only – not open to public
Burroloo Well Farmstay	Chittering	Self-contained guest house, farm stay, farm animals, animal feeding
Chittering Acres	Chittering	Farm, outdoor camping accommodation, art studio, garden art display, scenic views, WOOFing (Willing Workers on Organic Farms)
Chittering Valley Eco Cabin	Lower Chittering	Holiday house accommodation for 4 guests
Chittering Valley Retreat	Lower Chittering	Holiday house accommodation for 12 guests
Edge of the World Family Retreat	Lower Chittering	Holiday house accommodation for 8 guests
Enderslie House Bed & Breakfast	Muchea	6 x accommodation rooms, farm stay
Granny Flat in Chittering Valley	Lower Chittering	Cottage accommodation for 4 guests
La Belle Vue - Serene Holiday Nest	Lower Chittering	Holiday house accommodation for 8 guests
Moondyne Country Convention Centre	Lower Chittering	Cottage and chalet accommodation, conference/function facilities, 1,800-acre property
Orchard Glory Farm Resort	Bindoon	5 x cabins, farm stay, orchard, farm animals, events, function/conference venue
Peace Be Still	Lower Chittering	Guesthouse, retreat, workshop venue for up to 30 guests with meals + self-catering cottage for 10, paddock for caravan/camping groups
Pommegranite Homestead in the Valley	Chittering	Homestead with 3 x private rooms for 6 guests

Tourism and Recreation Product Audit

Robert Hindmarsh Rest Area	Wannamal	Rest stop for camping, caravans and motorhomes
Stone Cottage Retreat	Muchea	Bed and breakfast, 1 x private room for 2 guests
The Village Green	Lower Chittering	Park and rest stop for caravans and motorhomes
Treetops Guesthouse	Lower Chittering	Bed & Breakfast, orchard, bushtucker and Australian native herbs and spices grower (Outback Chef)
White Dog Farm Cottage Accommodation	Lower Chittering	1 x studio accommodation, farm, winery
Windmill Farm	Bindoon	Farm stay, 2 x chalets (12 and 17 guests), breakfast, catered meals for groups, training/meeting room, farm animals
Wootra Farm Bed and Breakfast	Bindoon	Farm, bed & breakfast, preserves

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Local Tourism/Recreation Product & Service Gaps – Recommendations

Tourism Product and Service Gaps

Gap	Recommendation
1. **Quality, tourism accredited, caravan, camping and cabin park in Bindoon**	Development of a quality, tourism accredited, commercial caravan, camping and cabin park to broaden accommodation product capacity, increase affordable accommodation product in the area, and to enhance target market appeal. *Opportunity to develop the first purpose-built Mountain Bike / Cycle friendly caravan & camping park in Western Australia e.g. secure bike storage, bike wash areas, bike hire, bike repair & servicing, MTB/Cycle trail maps and signage, cycle related talks/presentations, camp fire hub and campers kitchen for gatherings / briefings, MTB Park discounts etc.*
2. **Quality, tourism accredited and YHA Australia member backpacker accommodation in Bindoon**	Development of a quality, tourism accredited and YHA (youth hostelling association) member backpacker lodge to broaden accommodation product capacity, increase affordable accommodation product in the area, and to enhance target market appeal. *Opportunity to attract backpacker market with adventure tourism appeal (MTB Park, trails and hiking) + increase length of stay in the area as a prospective workforce for local farms, orchards (where skill shortages apply) e.g. Poshtel lodge*
3. **Local tour/transport/activity companies (currently only 2 identified)**	Canvas interest from local providers (Alavant Tours and Chittering Valley Tours) to develop tours that may appeal to/service visitors to a mountain bike park in Bindoon *Opportunity for other locals to develop tour and transport products and services* *Opportunity to include Bindoon activities in tour itineraries of well-established Perth-based tour companies*
4. **Evening activities/venues in Bindoon township**	Mediterranean Café & Restaurant and Scottalian Bindoon Hotel (4.3kms from mountain bike park site) are the only evening venues/activities available to visitors to Bindoon. Demand for evening activities will increase with sufficient overnight accommodation product developed within the Bindoon township.

Tourism Product and Service Gaps

Gap	Recommendation
	Opportunity for local businesses and residents to enhance evening offerings with increased visitation e.g. Astronomy experiences, entertainment, licensed premises, night tours (e.g. wildlife spotting), other unique product
5. **Summer activities/attractions**	Low tourism season in Bindoon occurs during the summer months – develop Summer events, activities and experiences to extend visitor seasonality to year-round visitation *Opportunity to develop Summer tourism product e.g. mountain bike park, cycle trails, events, water fun park, licensed ice bar, star gazing / astronomy events or other unique attraction/activity etc.*
6. **Aboriginal cultural experiences e.g. interpretive trails, guided walks, bushtucker tasting, Aboriginal astronomy**	No Aboriginal cultural tourism product currently available in the region *Opportunity to work with Koya Aboriginal Corporation's 'Aboriginal Nature Trekz' (based in Midland) and the Western Australian Indigenous Tourism Operators Council (WAITOC) to train local Aboriginal people to become tour guides and deliver Aboriginal Cultural tours and experiences at the mountain bike park and surrounding trails/sites in the area*
7. **Experiences or activities for people with a disability**	Incorporate accessible experiences and activities into tourism product development and the appropriate amenities and infrastructure for people with a disability and/or mobility issues e.g. dedicated parking, dedicated toilets/showers, pathways and wayfinding, transition and surface areas, directional and general information signage etc. *Opportunity to expand market mountain bike park and Shire cycle / trails networks with adaptive mountain biking and cycling sports-accessible facilities e.g. hand cycling, adaptive leg cycling, tandem cycling and modified mountain bikes*
8. **Unique tourism product or attraction**	Bindoon and the broader Shire of Chittering is not recognised in the domestic or international market for any specific unique point of difference that appeals to a variety of high yielding target markets. Becoming a mountain bike trail town or a cycle tourism Shire will provide greater consumer recognition however may not be competitively unique against other proposed trail towns such as Dwellingup or Collie. Unique features of a Bindoon Mountain Bike Park may provide a point of difference to competitors and provide additional sources of revenue for example: • Co-located adventure tourism / recreation facility • Unique events and tours e.g. astronomy, Aboriginal culture, signature mountain biking/cycling competition event • Unique experiences e.g. augmented reality downhill mountain biking experiences accessible to all ages, physical abilities, non-English speaking visitors, time-poor travellers etc. • Mountain bike-themed township e.g. brand collaboration by all local businesses, product offerings, facilities and public

Tourism Product and Service Gaps	
Gap	**Recommendation**
	art installations (such as the 'Cow' theme in Cowaramup) e.g. Bike-themed retail, servicing, bar and café [See Handle Bar Café with the motto 'Bites, Brews and Bikes' at www.orbea.com/gr-en/blog/a-legendary-mtb-cafe/]

• A unique 'Big Thing' attraction in Bindoon town centre e.g. *'The Big Mountain Bike'* to attract visitation, destination awareness, social media photo sharing, hashtag campaigns, visitor centre usage/ticket sales, product/service/souvenir sales etc.

Opportunity to stimulate brand awareness and the Shire of Chittering as a 'must-visit' destination for all travellers |
| **9. Cycle tourism trails, facilities and infrastructure** | Cycle tourist user cohorts include Leisure, Enthusiast and Sport and are a high spend visitor market categorised under seven different cycle types inclusive of: Road, Track Cycling, Mountain Biking, BMX, Touring (on-road or off-road), Recreation and Event Participants.

Broaden cycle tourism trails, facilities and infrastructure throughout the Bindoon township (and extended cycle trails e.g. Northlink WA Cycle Trail, Swan Valley to Bindoon Cycle Trail, Food & Wine Cycle Trail) to encourage length of stay in the area and patronage / visitor spend at local businesses

Opportunity to expand beyond traditional mountain biking market e.g. women, families, cycling groups/clubs, cycling events and competitions, co-use of mountain bike park related infrastructure and services

Opportunity for locals to develop Cycle Tourism products and services e.g. guided cycle tours throughout the region, bike hire / repair / equipment sales |
| **10. Mountain bike and cycling related products and services** | Development of products and services for the mountain bike and cycling market e.g. bike sales/hire, e-bikes, books/magazines, tyre repair kits, multi-tools, safety equipment, specialist apparel, transport services, secure bike storage units, bike wash stations, bike lock chains, bike servicing, coaching/instructors, cycle club and competition team, cycling tour guides, food & beverage, events, accommodation, function space etc.

Opportunity for local businesses to offer new products and services to meet the demands of cycle tourists |
| **11. Dedicated mountain biking / cycle tourism marketing strategy** | Develop and deliver a dedicated mountain biking / cycle tourism / adventure tourism marketing strategy – consider unique selling propositions and collaborate with all tourism product and service suppliers in the region (in conjunction with the development a mountain bike park) e.g. digital media strategy, wayfinding signage, dedicated campaigns, Destination Perth / Tourism WA collaborations, participation in industry trade, networking and media events etc.

Opportunity to identify Bindoon as a Trail Town over time to enhance the profile of Western Australia as a mountain biking and cycle tourism destination in domestic and international market sectors |
| **12. Quality individual** | Work with all tourism product providers in the Shire of Chittering to increase online brand quality and detailed information via |

Tourism Product and Service Gaps

Gap	Recommendation
tourism/recreation product websites, social media sites or detailed information	mobile device compatible and optimised websites, social media channels and consumer review sites to effectively engage with consumers and activate visitation/patronage *Opportunity to deliver a dedicated tourism enhancement project to all providers in the Shire to increase visitation, economic spend and business revenue*
13. Comprehensive local tourism product information online in one location	Visit Chittering website to increase tourism product content, imagery, directions, downloadable brochures, maps and guides, and links to all individual products and services in the Shire of Chittering *Opportunity to increase brand and product awareness, regional appeal, and to activate enquiries and bookings*
14. Online bookable product e.g. tours, activities, accommodation, meal reservations	Develop/provide business development resources to local business to increase their access to over 87% of travellers who only search, find and book their travel experiences online (mostly via mobile device) through online bookings technology. *Opportunity for businesses to operate online booking systems such as Rezdy (tours and attractions); Newbook (accommodation); TheFork (cafés/restaurants); and Eventbrite (events)* *Opportunity for businesses to connect to major third-party online booking channels (commissionable) to expand consumer awareness and domestic/international market reach such as Booking.com, Expedia.com, Viator.com, Sight Seeing Pass Australia, Trip Advisor Bookings etc.*
15. Minimal social media engagement and brand awareness	Increase investment and activity in social media marketing to key target market segments. Consider variations of 'VisitChittering' to align social media audiences with key tourism hotspots and product to increase market penetration e.g. #VisitBindoon or #BindoonAdventures (Bindoon is the tourism town for the Shire of Chittering therefore must be identified as the hero product that will provide benefits to the rest of the region).
16. Comprehensive tourism data for day visits and overnight stays in Bindoon and the destination of 'Chittering Valley'	Increase activity and share tourism data collection amongst key stakeholders e.g. Shire of Chittering, Chittering Visitor Centre, local tourism-related operators (e.g. occupancy reports, ticket sales), Destination WA, Tourism WA, Tourism Research Australia

Figure 34: HandleBar Café, Baltimore, USA

Figure 35: Cycle Trail, Gippsland, Victoria

Section 8:

Competitive Environment
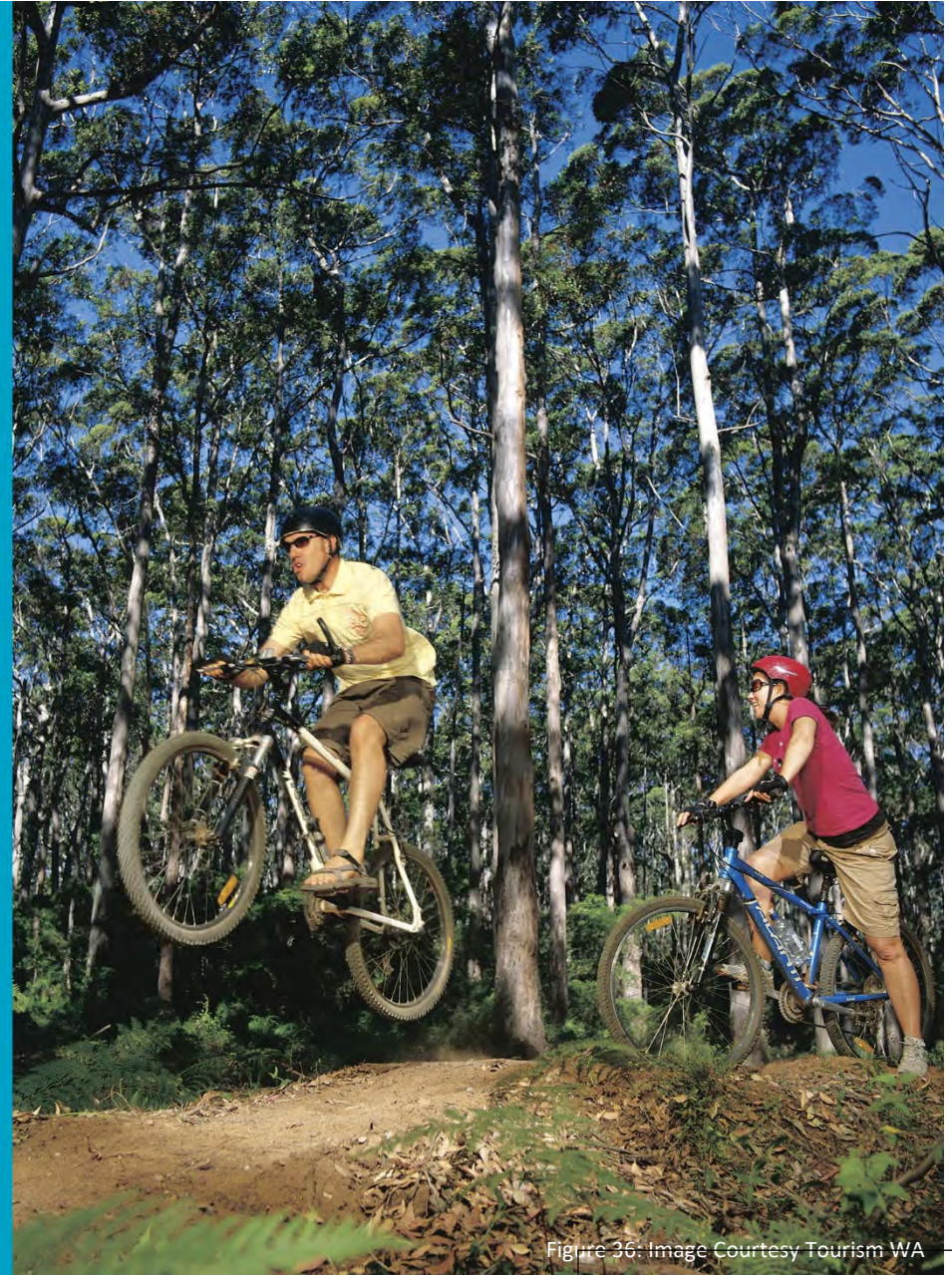
Analysis

Figure 36: Image Courtesy Tourism WA

8. Competitive Environment Analysis
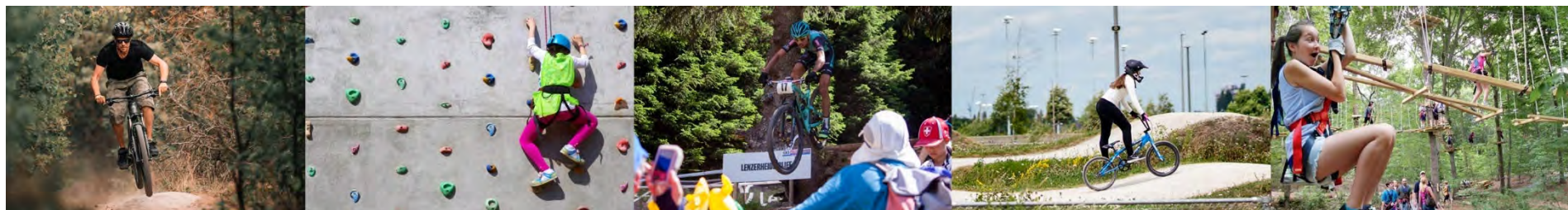
A review of competing mountain bike trail networks, adventure/amusement parks and outdoor recreation camps used by the largest target consumer market and population for a mountain bike and adventure park in Bindoon (Greater Perth) has been undertaken to assess current (and future) competition.

Competition: Mountain Biking & Outdoor Recreation Audit 2019

Competition: Mountain Biking and Outdoor Recreation Product Audit			
Mountain Bike Trails, Networks and Hubs	**Location**	**Proximity to Perth** (approx.)	**Description**
Albany Downhill Mountain Bike Trail	Albany	417km (4hr 58min) south east	• Less than 1 hour; 0.7 km; Very Difficult
Lake Leschenaultia, Chidlow	Chidlow	46km (50min) east	• 1-3 hours; 5km (Loop); Easy
Arklow Trails, Collie Trail Network	Collie	186km (2hr 9min) south east	• Dead Cat Trail; 1-3 hours; 3.8km • Rays Trail; 1-3 hours; 8km (Loop)
Collie Wagyl Biddi, Trail Network	Collie	186km (2hr 9min) south east	9kms connected trails; beginner and intermediate level 4.5kms of trails suitable for hand-cycles (adaptive mountain biking) • Drop Dead Fred, 1-3 hours; 1.3km (Loop) • Marri Meander, 1-3 hours; .85km (Loop) • Rocky Horror, 1-3 hours; 1.7km • Sprockets Rocket, 1-3 hours; 0.8km

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Competition: Mountain Biking and Outdoor Recreation Product Audit			
			• Wilman Trail, 1-3 hours; 3.2km (Loop)
Drop Dead Fred, Collie Wagyl Biddi	Collie	186km (2hr 9min) south east	• 1-3 hours; 1.3km (Loop); Moderate
Kurliiny Tjenangitj Trail, Wellington NP	Collie	186km (2hr 9min) south east	• Half day; 9.5km (Loop); Moderate
Mt Lennard, Pile Rd, Wellington NP, Trail Network	Collie	186km (2hr 9min) south east	• Boylan Trail, 1-3 hours; 6.5km • Butchers Trail, 1-3 hours; 3.2km • Grizzly Trail, 1-3 hours; 6km (Loop) • Lennard Half Circuit, 1-3 hours; 7km • Millbrook Trail, 1-3 hours; 8.3km; Mountain Bike, Urban Walk • Pallet Track, 1-3 hours; 1.5km • Wals, 1-3 hours; 2 km
Sika Trail, Wellington NP	Collie	186km (2hr 9min) south east	• Half day; 9.8km (Loop); Moderate
Wilman Trail, Collie Wagyl Biddi	Collie	186km (2hr 9min) south east	1-3 hours; 3.2km (Loop); Easy
Collie Darkan Rail Trail	Collie-Darken	186km (2hr 9min) south east	• Multiple day; 47km; Easy
Wellington Mills Downhill Trails, Trail Network	Dardanup/Boyanup	173km (1hr 50min) south east	• Central Line, 1-3 hours; 0.7km • Gravity Track, 1-3 hours; 0.8km • Rock Berm and Roots, 1-3 hours; 0.7km • Slickrock Track, 1-3 hours; 1.1km • Top Left Track, 1-3 hours; 0.3km • Up Track, 1-3 hours; 2.2km
Railway Reserves Heritage Trail, Perth Hills	Darlington -	27km (37min) east	Follows the route of the old Eastern Railway and is unique in

Competition: Mountain Biking and Outdoor Recreation Product Audit			
	Parkerville - Mundaring		providing a 41km loop entirely on railway formations. Trail passes through Darlington, Parkerville and Mundaring, and covers a wide range of terrains with scenic views and numerous points of historical and natural significance. • Full day; 41km (Loop); Easy
Denmark Tracks	Denmark	421km (5hrs) south east	Denmark has over 70kms of tracks designated for multiple use including bicycles and mountain bikes. These are located within and around the town as well as longer and more challenging trails reaching 15kms to the Hay River east of Denmark and Kent River to the west (30km). • A Railway Track between Nornalup and Denmak (56km) is open to walkers, cyclists and horse riders. *Potential plans for new mountain bike trails development in Denmark has been identified throughout the course of this study, however no information or formal plan has been released to the public at this time.*
Wilson Inlet Heritage Trail	Denmark	421km (5hrs) south east	Half day; 12km; Easy
Denmark to Nornalup Heritage Rail Trail	Denmark - Nornalup	421km (5hrs) south east	• Full day; 54.5km; Easy
Cycletrek	Donnybrook	421km (5hrs) south east	• 1-3 hours; 8km (Loop); Moderate
Dunsborough Country Club MTB Track	Dunsborough/ Meelup	249km (2hr 52min) south	Custom made MTB track skirting the edge of the golf course. • 1-3 hours; 8km (Loop); Moderate
Marrinup Trail	Dwellingup	105km (1hr 17min) south east	• Half day; 8km (Loop); Moderate
Waterous Trail, Lane Poole	Dwellingup	105km (1hr 17min) south east	• Multiple day; 61km (Loop); Easy; 2 x overnight stop options
South Shore, Peel Region	Dwellingup - Waroona	105km (1hr 17min) south east	• 1-3 hours; 5km (Loop); Difficult
The Piggery	Esperance	699km (8hr 5min) south	• Less than 1 hour; 11km (Loop); Moderate

Competition: Mountain Biking and Outdoor Recreation Product Audit

		east	
Chapman River	Geraldton	415km (4hr 29min) north	• 1-3 hours; 9.8km (Loop); Moderate
Goat Farm, Greenmount	Greenmount	24km (20mins) east	• Half day; 10km (Loop); Moderate
Greenough River Nature Trail	Grenough	550km (5hr 54min) north	• Half day; 17km (Loop); Moderate
Jarrahdale Balmoral Trail	Jarrahdale	60km (48min) south east	• Half day; 11km; Easy
Langford Park	Jarrahdale	60km (48min) south east	• 1-3 hours; 12km (Loop); Moderate
Yaberoo Budjara Heritage Trail	Joondalup - Yanchep	27km (23min) north	Neil Hawkin's Park, Joondalup to Yanchep National Park, Yanchep • Multiple day; 28km; Moderate
Kalamunda Trails Trail Network	Kalamunda	27km (31min) east	This is the largest, most popular network of trails in WA. The backbone of mountain biking in Perth. Caters for beginners to experienced riders. Based on the IMBA grading there is approximately 6 kms of green trails and a skills loop with information boards discussing technique. The green trails are focussed on the western side of the network. Intermediate IMBA blue trails account for the majority of the trails at 34kms in the network. There are only 3 advanced IMBA black trails and 2 of them feed off the top of Mt Gunjin making shuttle runs possible in a vehicle and dropping approximately 100m in height. The middle of summer is advised by Trails WA to be avoided due to extreme heat and loose dry soil. The best time to ride is often a day after some light rain to help hold the soil together providing a faster surface to ride on. 37 x sanctioned Trails include: • Alchemy, 1-3 hours; 1.5km • Apollo, 1-3 hours; 0.3km • Black Stump Pump Track, 1-3 hours; 0.1km • Camakazi, 1-3 hours; 3.9km • Camel Train, 1-3 hours; 0.9km

- Creek Trail, 1-3 hours; 0.8km
- Drago, 1-3 hours; 0.7km
- Feral Groove, 1-3 hours; 1.1km
- FJ, 1-3 hours; 2.8km
- Flaccid Ashback, 1-3 hours; 2.9km
- Goldilocks, 1-3 hours; 4.7km
- Gottysnobble, 1-3 hours; 0.4km
- Gridlocked, 1-3 hours; 1.3km
- Highway to Dell; 1-3 hours; 0.8km
- Horny Devil, 1-3 hours; 2km
- Joeys Line and Dugite; 1-3 hours; 1.1km
- Judderbars, 1-3 hours; 0.9km
- Lancaster; 1-3 hours; 1.1km; Difficult
- Lazarus, 1-3 hours; 0.7km
- Loco en el Coco, 1-3 hours; 1.4km
- Lost and Found, 1-3 hours; 0.8km
- Lube Me Up, 1-3 hours; 1.4km
- Luvin Shovels, 1-3 hours; 1.9km
- Mercury Lane, 1-3 hours; 0.3km
- Mercury Street, 1-3 hours; 2.3km
- Metasoma, 1-3 hours; 1.1km
- Mother-in-Law, 1-3 hours; 0.9km
- Muffin Tops, 1-3 hours; 1.3km
- Rocky Balboa, 1-3 hours; 0.7km
- Scorpion Trail, Half day; 1.94km
- Shake Rattle & Roll skills loop, 1-3 hours; 0.8km
- Slippery when dry, 1-3 hours; 2.7km
- Tangaroo Kick, 1-3 hours; 0.4km

Competition: Mountain Biking and Outdoor Recreation Product Audit			
			• Three Bears, 1-3 hours; 0.8km
			• Up Up and Away, 1-3 hours; 0.9km
			• X-Files, 1-3 hours; 0.3km
Karratha MTB Trail Network	Karratha	1,529km (16hrs) north	• 1-3 hours; 15km (Loop); Moderate
Compartment 10, Trail Network	Margaret River	271km (3hr 5min) south	• A River Somewhere, 1-3 hours; 0.7km
			• Bender, 1-3 hours; 0.5km
			• Big Climb, 1-3 hours; 0.6km
			• Big Pine, Less than 1 hour; 0.8km
			• Cash & Karri, 1-3 hours; 0.3km
			• Cut Cork, 1-3 hours; 1.3km
			• Golden Carrot, 1-3 hours; 0.6km
			• High Horse, 1-3 hours; 0.5km
			• Line Manager, 1-3 hours; 0.5km
			• Paper Trail, Margaret River; 1-3 hours; 0.6km
			• Pedilup, 1-3 hours; 0.4km
			• Pugsley, 1-3 hours; 0.6km
			• Rock & Root, 1-3 hours; 0.3km
			• What Goes Down, 1.3 hours; 0.6 km
			• WRC, 1-3 hours; 0.6 km
Creek Trails, Trail Network	Margaret River	271km (3hr 5min) south	• Brides Nighty & Snake Balls, 1-3 hours; 1km
			• Bullant, 1-3 hours; 0.4km
			• Classic Creek, 1-3 hours; 2.3km
			• Entry Trail, 1-3 hours; 0.4km
			• Fitness Loop, 1-3 hours; 0.3km
			• Goobers Pool Up, 1-3 hours; 0.1km;
			• Goobers Pool, 1-3 hours; 1.6km
			• Jump Track, 1-3 hours; 1.1km
			• Little Uluru, 1-3 hours; 0.7km

			• Outer Loop, 1-3 hours; 0.5km
			• Trail of Discontent, 1-3 hours; 0.8km
			• Valley Girl, 1-3 hours; 0.6km
			• Western Suburbs Up, 1-3 hours; 0.3km
			• Western Suburbs, 1-3 hours; 0.5km
			• Winter Track, 1-3 hours; 0.5 km
Ten Mile Brook Trail	Margaret River	271km (3hr 5min) south	• Half day; 15km; Easy
The Pines Trails, Margaret River Trail Network	Margaret River	271km (3hr 5min) south	• Aunt Lou, 1-3 hours; 1.2km
			• Beginning at the End; 1-3 hours; 0.4km
			• Double Espresso, 1-3 hours; 0.5km
			• Jump Line; 1-3 hours; 0.3km
			• Lily Trail, 1-3 hours; 1km
			• Long Macchiato, 1-3 hours; 0.4 km
			• Mr. Nice, 1-3 hours; 1.1 km
			• The End, 1-3 hours; 0.5 km
			• Whoop Whoop, 1-3 hours; 0.7km
Wadandi Track	Margaret River	271km (3hr 5min) south	• Full day; 23km; Easy
Munda Biddi Trail www.mundabiddi.org.au	Mundaring – Albany (including Waroona)	33 – 1000kms	Worldclass off-road Mountain Biking / Cycling experience. Multiple day trail; 1070km; Moderate Off-road bike trail; camping sites and shelters; flora and fauna; culture and heritage; and events 9 maps cover the Munda Biddi Trail: • Mundaring to Jarrahdale • Jarrahdale to Nanga • Nanga to Collie • Collie to Jarrahwood • Jarrahwood to Manjimup • Manjimup to Northcliffe

			• Northcliffe to Walpole • Walpole to Denmark • Denmark to Albany
Kep Track, Mundaring to Northam	Mundaring-Northam	33km (39min)	• Multiple day; 75km; Easy
Nannup Downhill Trails, Trail Network	Nannup	267km (2hr 57min) south	• Nannup Downhill Trail, 1-3 hours; 1km • Nannup State DH Trail, 1-3 hours; 1 km
Old Timberline and Sidings Rail Trails	Nannup	267km (2hr 57min) south	• Multiple day; 37km (Loop); Easy
Aroundtu-It	Northcliffe	347km (4hr 1min) south	• 1-3 hours; 5.7km (Loop); Moderate
Pemberton Mountain Bike Park, Trail Network	Pemberton	325km (3hr 42min) south	The Pemberton Mountain Bike Park is set in the heart of the giant Karri forests. Although short, the two downhill runs (Relentless Blue and Cool Runnings) are highly challenging and popular. Good variety of trails for all abilities. 1.5km XC skills loop and impressive dirt jumps adjacent to the car park. Local 'Trail Friendly' businesses are featured on the Pemberton Trail Hub page. *Pemberton MTB Park is a National level ride destination; part of the Western Australian South West MTB Master Plan • Ankle Biters Loop, 1-3 hours; 0.5km • Bloody Mary, 1-3 hours; 1.2km • Cool Running, 1-3 hours; 2km • Down Dale Link, 1-3 hours; 0.3km • Drop Bear, 1-3 hours; 1km • Longshanks, Less than 1 hour; 1.02km • Pinch Track, Less than 1 hour; 0.6km • Pirate Trail, 1-3 hours; 1.2km • Pumphill Uphill, Less than 1 hour; 1.5 km; Bush Walk, Equestrian, Mountain Bike • Railway Run XC, 1-3 hours; 1.84km (Loop)

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Turner Hill MTB Trail, Murray	Pinjarra/Dwellingup	83km (56min) south east	• 1-3 hours; 11km (Loop); Moderate
Forsyths Mill, Perth Hills	Sawyers Valley	56km (42min) east	• 1-3 hours; 6km (Loop); Moderate
Linga Longa Bike Park www.lingalongabikepark.com	Southampton/Baling up	242km (2hr 46min) south east	Private property bike park. Tagline is 'Western Australia's Gravity Mountain Bike Park'. Amenities include: showers/toilets; café; fire pits; camping and caravan areas (unpowered); 2 x cottages for hire; bike wash station; shuttle bus uplift; swimming (dam, swimming hole) Hosts dedicated public ride days, events and competitions Visitors must complete an online Waiver prior to purchasing a ticket to the park. 8 x MTB Trails with 2 new trails in development: • Boxers Blast - Trail Rating: Double Black Diamond; Average Fall: - 7.6 %; Length: 2.1 Km • Valley of Dreams - Trail Rating: Black Diamond; Average Fall: -12.4%; Length: 1.3km • Mr Enduro - Trail Rating: Double Black Diamond; Average Fall: -8.1%; Length: 2.1Km • Edge of the World - Trail Rating: Double Black Diamond; Average Fall: 16.9%; Length: 1.5km • Huggies - Trail Rating: Black Diamond; Average Fall: 17.5%; Length: 1km • Devin's Descent into Madness – Trail Rating: Double Black Diamond; Average Fall: 15.5%; Length: 1.1km • Rake N Ride - Trail Rating: Double Black Diamond; Average Fall: 16.9%; Length: 1.5km • Cotton Wool Society – Uptrail • Mrs Enduro – Trail Rating: Blue (in development) • Brymans Blues: Trail Rating: Blue (in development)
Unsanctioned Mountain Bike Trails	There are many unsanctioned mountain bike trails in Western Australia, particularly in the Perth Hills (some may be		

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listed on websites such as Trailforks.com however these are not endorsed by the peak industry body WestCycle or the Western Australian Government.

Unsanctioned trails are at risk of poor safety and negative impact on flora, fauna, heritage and the broader environment and community.

According to WestCycle's website article in response to unsanctioned trail building in the Perth Hills posted in June 2018:

"…the development of mountain bike trails in the Perth Hills have failed to keep up with the increasing demand from the mountain bike community"; "…The issues we are currently facing in Western Australia due to the lack of trail availability are not uncommon around the world. How we respond to, and how we manage and capitalise on this growing demand is what is important right now. To be clear. WestCycle does not support or condone the building of unsanctioned trails. There are significant environmental, land use and heritage issues that need to be carefully considered. Most mountain bikers understand this and respect the land and their potential impacts on natural landscapes. The proliferation of unsanctioned trail building that is happening is a consequence of not keeping up with demand. It's not an excuse but the reality of where we are at."

Proposed Mountain Bike Trails, Networks and Hubs	Location	Proximity to Perth	Overview
Collie Trail Adventure Town	Collie	186 km (2hr 9min) south east	The State Government announced $10M for the Collie Trail Adventure Town project in April 2019. This will be the biggest single investment in trails in Western Australian history. The package will create 100 kilometres of high-quality mountain bike trails through the river valley between Wellington National Park and the town of Collie including: • 65km of world-class 'epic' trails in the Wellington National Park; • 35km of trails in the Westralia Conservation Park on the outskirts of Collie; • A further 11km of trail in Arklow forest block near Collie; • The realignment of 20km of the Munda Biddi cycle trail through the town of Collie; • Completion of the 72km, five-day Wiilman Bilya walk trail around Wellington Dam from Collie around the Wellington National Park; and

			• Infrastructure investment to establish a trail centre in the Collie town centre and secondary trails hubs at Wellington Dam kiosk and Westralia (including a Collie river crossing).
Dwellingup National Trails Centre Project	Dwellingup	105km (1hr 5min) south east	Following an investment of $1.2M by the Shire of Murray into the development of a National Trails Centre, the Federal Government committed an additional $3.465 million through the Building Better Regions Fund in March 2019. The project will deliver 80 ongoing jobs in Dwellingup and is tipped to attract an additional 75,000 visitors to the region attracting riders from across Australia and internationally. The Dwellingup Trail Centre Plans have been approved and the Federal funding will go towards: • Construction of 20kms of mountain bike trails in Murray Valley • Sealing the 28km arterial road inside Lane Poole Reserve • Construction of an additional 12kms of trails linking into and out of Dwellingup • A new bridge across Murray River at Baden Powell reserve to join north and south mountain bike circuit • Realignment and improvement of 6kms of the Munda-Biddi Trail • Increased parking at key trail sites around the trails network • Upgrades to sections of the Captain Fawcett 4WD trail
Nannup Cycle Trail Hub	Nannup	267km (2hr 57min) south east	The State Government announced they were partnering with the Shire of Nannup to establish Nannup as a trails hub for cyclists in June 2019. The State Government has committed $15,000 from the Forests Products Commission (FPC) and $133,000 from Lotterywest, which will go towards the development of a cycling masterplan and the preparation of documents to sanction cycling trails in the Shire of Nannup. The trails hub is set to increase tourism and stimulate the local

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			economy, as well as engage communities and strengthen the relationship between active forest users and forest management practices. The FPC is committed to supporting tourism opportunities in regional areas connected to WA's forestry industry to support jobs and regional economies.
Shire of York – Trails Project	York - Northam	104km (1hr 4min) east	A Draft of the Shire of York Trails Master Plan – Vision 2019-2028 has been released for public comment. The vision for York to become a Trails Town has identified opportunities for Bushwalking/urban walk/trail running; Mountain Biking; Cycling; Equestrian; Paddle Dive/Snorkel; 4WD; Trailbike; and 2WD Trails. Feedback from the public will confirm support for the proposed projects documented within this vision document. Following collation of public feedback, and incorporation of merited amendments, a final Shire of York Trails Master Plan will be presented to the Council for endorsement. See Plan at: https://www.york.wa.gov.au/Profiles/york/Assets/ClientData/Documents/News/Trails_Masterplan/Draft_York_Trails_Master_Plan.pdf
Shire of Ashburton Trails Planning	Onslow	1,380km (14hr 43min)	*Project identified by Department of Sport and Recreation – no information available to the public at this time*
City of Albany: Albany - Denmark Trails Project	Albany - Denmark	417km (4hr 58min) south east	City of Albany Trails Hub Strategy 2015 - 2025 released in 2015. Trails project currently in planning
Perth and Peel Mountain Bike Master Plan	Perth and Peel	30km (27min) – 105km (1hr 5min)	Priority locations for the development of MTB trails in Perth and the Peel Region of National Significance are recommended as the Perth Hills Precinct; Dwellingup Trail Town; and Wungong Trail Centre (City of Armadale and Shire of Serpentine-Jarrahdale) Secondary locations of Regional Significance for trails recommends: Swan Valley Trail Centre; Jarrahdale Trail Town; and a Yanchep Trail Centre Planning by local and State Government is now underway with Federal Funding committed to the Dwellingup Trails project in 2019.

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South West Mountain Bike Master Plan	South West	186km (2hr 9min) – 271km (3hr 5min)	Priority locations for the development of MTB trails in the South West of WA of National Significance are recommended as Margaret River; Collie/Wellington; and Pemberton. Secondary locations of Regional Significance for trails recommends: Dunsborough and Nannup. Planning by local and State Government is now underway with funding committed to Collie and Nannup trails projects in 2019.
Shire of Augusta-Margaret River Trails Project	Augusta-Margaret River		*Project by Shire of August-Margaret River has stalled*
Adventure / Amusement Parks	**Location**	**Proximity to Perth**	**Overview**
Splash City (Pop-up Water Park) https://www.facebook.com/SplashCityPerth/	Burswood or Pop-up location	6km east or pop-up	Pop up waterpark Perth pop up open November to February • World's tallest inflatable waterslide • 23m high 'The Nova Drop' (sponsored naming rights) • Activities: trampolines, 65m obstacle course, 2 pools, 3 giant slides • Under 5s and spectators free of charge
Adventure World www.adventureworld.net.au	Bibra Lake	23kms south	Amusement Park Open for Summer Seasons only Oct – May Tourism Accredited Business • Amusement park rides: $12million roller coaster 'Abyss'; Black Widow; Rampage; Freefall; Bounty's Revenge; Dragon Express; Yarli's Barrel Spin; Little Reaper; The Barnacle; Dragon Flyer • Water Activities: $7million water slide (tallest, steepest and longest in the world), Tunnel of Terror; Rocky Mountain Rapids; Water Mountain Mat Slides; Speed Slides; The Shot Gun Slide; Aqua Super 6 Racey; Kahuna Falls; The Lagoon; Bumper Boats; Kingdom Falls; Paddle Boats; • Activities: Grand Prix Race Track; Rail Rider ; Sky Lift; Skull Rock; Aussie Wildlife Experience; Koi Pond; Yarli's Safari; Dragon's Kingdom

			• Day and night events Calendar
			• Exclusive Theme Park Hire
			• Cabana Hire
			• Gift Vouchers, valid 12 months
			• 4 Food Outlets
			• Catering services
			• Various retail and official merchandise outlets
			• 3 official photography points
			• Groups; School Excursions; Children's Parties; Team Building Programs (facilitated by Total Team Building)
Kalamunda Water Park http://www.kalamunda.wa.gov.au/Leisure-Tourism/Sports-Fitness/Recreation-Facilities/Water-Park	Kalamunda	26kms east	Water Park Managed by Belgravia in partnership with the City of Kalamunda Open November to March • 2 tube slides (the Zig Zag and the Corkscrew) • Splash Pad in the Kiddies Play Area (for toddlers and young children) • 8 lane 50 metre Olympic pool and 2 children's pools • Lawned and shaded picnic areas, picnic tables, gas bbqs for hire • Kiosk • Showers and Change Rooms • Storage lockers
Perth Wake Park www.perthwakepark.com.au	Baldivis	42kms south	Cable Wake Ski Park Seasonal opening times • 11.6 hectare property, 3 man-made lakes • Cable wakeboarding and kneeboarding • Central commercial building includes: office; reception; ticket counter; retail and hire equipment; change rooms/toilets; café; undercover viewing area • Touch pad check-ins on arrival, bar code wristband scanner for

			cable access

cable access
- Nursery course for children and beginners
- General course
- Obstacle course
- Compulsory safety video and signed waiver before ski
- Exclusive Venue Hire available 8am-10am

Bonney's Water Ski Park www.bonneyswaterskipark.com.au	Baldivis	42kms south	Water Ski Park and Caravan Park - 5 man-made lakes - BYO boats tow water skiers, wakeboarders, kneeboarders, ski biscuits - General and obstacle lakes - Competitions and events - Caravan/camping; lake house and cabin accommodation - BBQ's, picnic areas and ablution facilities - Café
Outback Splash at the Maze Family Fun Park www.outbacksplash.com.au	Bullsbrook	52kms north east	Adventure / Amusement Park Open year round (Waterslide playgroup open September to April) - Mazes: Timber Maze; Hedge Maze; Tractor Tyre Maze; Danae's Dilemma Maze; Tayla's Tangle Maze; Phil's Frustration Maze - Activities: minigolf; children's playground; giant jumping pillow; giant garden chess; hookey board; volleyball course; wildlife (birds, koalas, emus, kangaroos, birds); Pat 'N' Snap Koala Photo Experience - Waterslide playground Sep-Apr: The Plummet inflatable slide; Octopus Bay kids splash zone; 17.5m waterslide tower with rafting and single slide rides; cabana hire - Café Iguana; Mobile Coffee Cart and Snacks - Picnic facilities and barbecues
Trees Adventure Yanchep www.treesadventure.com.au	Yanchep	57kms north	Outdoor Adventure Park - tree ropes and ziplining experience Operators: Canopy Adventure Yanchep Pty Ltd

			Other Trees Adventure Parks: Dwellingup (WA), Glen Harrow Park (VIC), Yeodene Park (VIC), Grose River Park (NSW), Nowra Shoalhaven Park (NSW), Hollybank Wilderness Adventures (TAS)
			Co-located with Yanchep National Park (Operated by DBCA)
			• 7 long ropes courses, 70+ Challenges, 16 ziplines (longest zipline 80 metres)
			• 2.5-hour Sessions (including harnessing and training)
			• Training and instruction
			• Deck Hire
			• GoPro Hire
Dwellingup Adventures www.dwellingupadventures.com.au	Dwellingup	104kms south east	Outdoor Adventures • Guided outdoor recreation activities include: abseiling; wall climbing; jarrah zip line; reverse rain; super splashdown; canoeing; fast water rafting; low ropes; posers and predicaments; games; advanced camp crafts; evening activities; bike tours; flat water rafting; white water rafting; orienteering; raft rescue; compass wheel; pipeometre; swiftwater awareness training; • White water rafting tours • Self-guided tours • Kayak, canoe, mountain bike and camping equipment hire and delivery; retail and second-hand sales • Accredited water rescue training • Camps and Accommodation • Charter services • Access to Bibbulmun Track • Access to Munda Biddi Trail
Trees Adventure Lane Poole Park www.treesadventure.com.au	Dwellingup	108kms north	Outdoor Adventure Park - tree ropes and ziplining experience Operators: Canopy Adventure Yanchep Pty Ltd Other Trees Adventure Parks: Yanchep (WA), Glen Harrow Park (VIC), Yeodene Park (VIC), Grose River Park (NSW), Nowra

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			Shoalhaven Park (NSW), Hollybank Wilderness Adventures (TAS)
			Co-located with Lane Pool Reserve (Operated by DBCA)
			• 9 long ropes courses, 80+ challenges, 23 flying foxes (longest flying fox 100 metres)
			• 2.5-hour Sessions (including harnessing and training)
			• Training and instruction
			• Café
			• Deck Hire
			• GoPro Hire
			• Camp site near by
Dwellingup Adventures www.dwellingupadventures.com.au	Dwellingup	104kms south east	Outdoor Adventures • Guided outdoor recreation activities include: abseiling; wall climbing; jarrah zip line; reverse rain; super splashdown; canoeing; fast water rafting; low ropes; posers and predicaments; games; advanced camp crafts; evening activities; bike tours; flat water rafting; white water rafting; orienteering; raft rescue; compass wheel; pipeometre; swiftwater awareness training; • White water rafting tours • Self-guided tours • Kayak, canoe, mountain bike and camping equipment hire and delivery; retail and second-hand sales • Accredited water rescue training • Camps and Accommodation • Charter services • Access to Bibbulmun Track • Access to Munda Biddi Trail
Outdoor Recreation Camps *1.5 hours of Perth Metro	**Location**	**Proximity to Perth**	**Overview**

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Point Walter Recreation and Conference Centre https://www.dsr.wa.gov.au/camps/locations/point-walter	Bicton	18kms south	Parkland and cliff escarpment locality overlooking the Swan River and Perth city Modern, sleeps up to 124 people in 6 blocks. 31 rooms with two bunk beds (4 people) per room. Linen provided. Ablutions. Catering available Roping, land and water programs including flying fox, abseiling, high ropes, crate climb, raft building, kayaking, pool supervision, team building, orienteering, kite making, archery, mountain biking, accredited training. DSR Camp; Member of Australian Camps Association; Licensed Training Provider; school holiday camps
Rottnest Island Education Camps www.rottnestisland.com	Rottnest	19kms (boat) west	Island, bushland, lakes and ocean Rottnest Island accommodation and camping options Catering and self-catering available 9 facilitated activities and 9 self-guided experiences linked to the WA and Australian Curriculum + access to external tours and activities provided on the island. Rottnest Island Education Team
Ern Halliday Recreation Camp www.dsr.wa.gov.au/camps/locations/ern-halliday	Hillarys	23kms east	Set in 28 hectares of natural bushland, adjacent to Hillarys beach 3 dormitory accommodation areas with capacities of 50, 56 and 138 people. Separate Leaders Cottage sleeps eight. 2 x tent camp sites, total capacity 170 campers. Catering and self-catering Camps and Day Groups, meeting hall seats 100, indoor stadium, lake, oval, underground cave, disabled access to all facilities, training programs. 22 recreation programs + custom options and holiday programs. Activities include: abseiling, ascending, big swing, crate climb, flying fox, Jacob's ladder, rock climbing, vertical ascent, roping combo, archery, caving, coastal bike tour, icebreaker games, kite making, lost pilot, orienteering, orienteering (advanced), team building, team building (advanced), water supervision, beach team building, paddling, paddling advanced, surf lifesaving, kite making, orienteering.

			DSR Camp
			Member of Australian Camps Association; Licensed Training Provider; school holiday camps
Camp Wattle Grove www.campwattlegrove.com.au	Wattle Grove	23kms east	Located in the foothills of the Darling Ranges
			6 huts sleep 143 (18; 22; 40; 41; 22); 2 Bedrm house sleeps 5; 3 Bedrm family unit sleeps 8
			Catering and self-catering
			Auditorium seats 550; dining rooms seats 180; commercial kitchen; swimming pool; playground; sports oval; camp kitchen; barbecues; Activities include: 3 in-ground trampolines, gyro-ball, table tennis, bush volleyball, bush walks, cricket pitch, sandpit, low ropes course, flying fox, camp fires (in season).
			Member of Christian Camps Australia
Swan Valley Adventure Centre www.swanvalleyadventurecentre.org	Middle Swan	24kms north east	Rural area of the Swan Valley, by the Swan River
			6 residential camp houses for up to 235 people(bed rooms, bunk rooms, disability access rooms and facilities)
			Conference rooms, meeting rooms, boardroom, hall with stage, casual space and creché area, adjacent to St Mary's Anglican Church.
			Recreation facilities include: swimming pool, tennis courts, beach volleyball court, outdoor netball/basketball courts, oval, cricket nets, river access for canoeing, bush area. External outdoor recreation facilitators used by clients as required.
			Activities include: archery, commando course, blackout zone, mountain biking, orienteering, high ropes course, flying fox, abseiling, rock climbing, challenge pod, canoeing, kayaking and campfire evening activity.
Bickley Outdoor Recreation Camp https://www.dsr.wa.gov.au/camps/locations/bickley	Orange Grove	25kms east	Located on the Darling Scarp by the Bickley Reservoir
			Dormitory accommodation for up to 72 people, tent camping for 50 people and day use for up to 100 people.
			Catering available through Accolade Catering or self-catering
			15 standard program options + custom options; quarry abseiling,

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			onsite abseiling, climbing wall, crate climb, flying fox, leap of faith, vertical challenge, canoeing, raft making, swimming supervision, icebreakers, mountain biking (beginner & advanced), orienteering, search and rescue, team building. DSR Camp Member of Australian Camps Association; Licensed Training Provider; school holiday camps
Woodman Point Recreation Camp www.dsr.wa.gov.au/camps/locations/woodman-point	Coogee	37kms south west	6.5 hectare coastal site located 8kms south of Fremantle. Site has significant historical and cultural importance Dormitory accommodation with capacities of 32, 60, 60 and 100. Standalone cottage for up to 9 camp leaders. Tent camp site for up 50. Day use area capacity for up to 150. Catering available through Accolade Catering or self-catering State-of-the-art CUBE facility for a variety of adventure and roping programs. 22 recreation programs + custom options and holiday programs. Activities include: archery, quarantine, historical night tour, kite making, orienteering, search and rescue, team building, ultimate sports, abseiling, flying fox, high ropes, rock climbing, vertical challenge, raft building, surf lifesaving, surf ski paddling, water supervision. DSR Camp Member of Australian Camps Association; Licensed Training Provider; school holiday camps
Serpentine Camping Centre www.baptistcampingcentres.org/serpentine/	Jarrahdale	45kms south east	Bush setting 4 dormitories with 5 rooms in each, containing 8 (bunk) beds each Full catered 21m swimming pool, climbing wall, archery, gymnasium, outdoor basketball and tennis courts, mini golf, table tennis, large oval, meeting hall, volleyball, netball, badminton, meeting rooms, Division of Baptist Camping Centres, activities coordinated by Adventure Out Australia, National Accommodation, Recreation and Tourism Accreditation (NARTA), Member of Outdoors WA

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Christian Youth Camps Lake Cooloongup www.cycwa.com.au	Baldivis	46kms south west	Bushland retreat Capacity 160, 6 x dormitories sleep 24; 32; 32; 36; and 10 motel style units sleep 20 Fully catered Auditorium seats 160; 6 x external study rooms; dining room; ablution blocks; barbecue areas; games room with table tennis and pool tables; tennis courts, oval; activities include: flying fox, trampolines, mini golf, low ropes course, abseiling, rock climbing wall, adventure course, dunking machine, crate climbing. Christian Youth Camp WA; Member of Christian Camps Australia
Kerem Adventure Camp www.keremadventurecamp.com.au	Bullsbrook	52kms north east	Rural bushland location 15 minutes from Joondalup; 500m from Outback Splash at The Maze Camp sleeps total of 130 people in 5 individual accommodation huts made up of dormitories and individual rooms (43; 30; 20; 16; 20); Camp day groups Catering or self-catering Central camp kitchen and dining hall; undercover bbq and dining area; meeting hall; indoor recreation room; volleyball court, basketball court, sports oval, bushwalking trail; swimming pool; camp fire; ablution blocks; tent camping area. Activities include: adventure activities, archery, astronomy discovery nights, Australian bush poetry performance, boot camp and fitness activities, colour run & colour wars, disc golf / frisbee golf, emu mile, running trail or bushwalk discovery, rock climbing, tug-o-war, zorb balls, team building activities, excursions to nearby Outback Splash at The Maze. Anglican/Christian Camp. Clients include Guildford Grammar, John Septimus Roe and Newman College. Member of Christian Camps Australia *Excellent modern website/branding
Fairbridge Village www.fairbridge.asn.au	Pinjarra	90km south east	26 hectare, heritage listed village, nestled on the south Dandalup River Cottages sleeping 2 to 56 people for up to 200 people. Professionally fully catered or self- catering

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			Adventure, cultural and environmental team-building activities; youth charity; accredited training courses; camps for schools, religious, corporate, disability and community groups; historical tours / day trips; regional events/festivals; corporate conferences, functions, events
			Registered training organisation; Member of Outdoors WA
Dare Outdoor Adventure Camp **Dwellingup Bunkhouses** www.dareadventures.com.au	Dwellingup	105km south east	Located on 12 acres, surrounded by State owned jarrah forest
			80 Beds, BYO linen, 2 x 28 bed Bunkhouses, 1 x 12 bed chalet, 1 x 12 bed bunkroom
			Resident cook, or self-cater for private hire only
			Large communal dining room
			Outdoor adventure camp, abseiling tower, climbing wall, flying foxes, confidence course, archery canoeing, rafting, BMX tracks and bikes, mountain bikes, trampolines, ¼ basketball court, large oval, bush walking, paintball, large activity lake
			Accredited Tourism Business; completing Campsite accreditation - Aussie Host; Food Safe; Member of Outdoors WA; Member of Paintball Association of WA
Nanga Bush Camp and Forest Retreat www.nangabush.com	Dwellingup	110km south east	80 acres jarrah forest with 1km Murray River frontage (Lane Poole Reserve)
			300 beds in 3 bunk houses, 4 beds per room, separate accommodation for leaders. Up to 34 beds in cottage, BYO linen
			Catering service or self-catering facilities in each bunkhouse and cottage.
			Abseiling, climbing walls, low ropes challenge course, canoeing, rafting, orienteering, swimming, mountain bikes, indoor recreation areas, professional instructors.
			Member of Outdoors WA
Forest Edge Recreation Camp www.forestedge.net	Waroona	115kms south	Positioned amongst rural pastures and scenic Darling Ranges; close to township of Waroona and Lake Navarino / Waroona Dam
			Dormitory accommodation with 23 rooms (140 single beds), ensuited staff rooms, dining, entertaining, ablution and indoor

			activity area; Campsites
			Catering service or self-catering facilities
			Flying fox, abseiling (natural surface), abseiling tower (artificial surface), climbing wall, orienteering course, rock climbing, target shooting, pamper pole / leap of faith, low ropes course, boomerang making, screen printing, bush walking incentive course, bush skills, catapult, initiative games, kayaking (flat water)- ski biscuiting - water skiing - raft building (Waroona Dam), horse riding (outsourced)
			Tourism Accredited Business, Member of Tourism Council WA, Member of Outdoors WA, Member of Australian Camps Association
Camp Mornington www.campmornington.com.au	Wokalup (near Harvey)	151kms south	Former saw mill, bushland location
			2 designated camp areas, Camp Mornington dormitory sleeps up to 80 in 4 rooms + 4 supervisor rooms. Camp Variety sleeps up to 50 in 2 dormitories each with 2 rooms + 2 supervisor rooms
			Catering provided
			Activity halls, gymnasium/basketball courts, swimming pool. Activities include: climbing wall, high ropes course, mid ropes course, low ropes course, raft-building/canoeing, abseiling tower, bush biking, shelter building, crate climbing, orienteering, flying fox.
			PCYC Operated (not-for-profit camp)

Other Recreation Camps noted outside of the 1.5 hour Competition Catchment Area from Perth included:

- Bridgetown Camp School (DET), Bridgetown, 261kms from Perth www.fairbridge.asn.au/bridgetown-camp-school
- Margaret River Retreat, Margaret River, 280kms from Perth www.margaretriverretreat.com
- Big Valley Campsite, Margaret River, 290kms from Perth www.mronline.com.au/accom/bigvalley
- Donnelly River Holiday Village, Manjimup, 300kms from Perth www.donnellyriverholidayvillage.com.au
- Pemberton Camp School (DET), Pemberton, 335kms from Perth www.pembertoncampschool.com.au
- Geraldton Camp School (DET), Geraldton, 419kms from Perth www.geraldtoncampschool.wa.edu.au
- Centre for Sustainable Living, Denmark, 420kms from Perth csl@denmarkcsl.com.au

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- Camp Quaranup (DSR), Big Grove – Albany, 432 kms from Perth www.campquaranup.com.au
- Goldfields Camp School (DET), Kalgoorlie, 595kms from Perth www.Goldfieldscampschool.wa.edu.au
- Ningaloo Reef Adventure Camp, Coral Bay, 1,133kms from Perth www.ningalooadventures.com
- Broome Camp School (DET), Broome, 2,189kms from Perth www.broomecampschool.com.au

Table 10: Competitive MTB and Outdoor Recreation Analysis

Section 9:

Tourism Visitation Analysis

Figure 38: Image courtesy Tourism WA

9. Tourism Visitation Analysis

Shire of Chittering Tourist Visitation

Figure 39: Chittering Valley from Hartley Estate Winery – Image courtesy Tourism WA

Shire of Chittering Day Trips – Economic Spend 2010 – 2016[9]

CommonDaytrips (Visitation)	2010-2013	2011-2014	2012-2015	2013-2016
Holiday	np	np	np	np
Visiting friends & relatives (VFR)	np	np	np	np
Sub-Total Leisure	**93,000**	**98,000**	**103,000**	**110,000**
Business	np	np	np	np
Other	np	np	np	np
Total	**111,000**	**128,000**	**133,000**	**136,000**

Table 11: Shire of Chittering Day Trips 2010-2016

Daytrips (Economic Spend)	2010-2013	2011-2014	2012-2015	2013-2016
Holiday & VFR	93,000	98,000	103,000	110,000
Business & Other	18,000	22,000	30,000	26,000
Total Visitors	**111,000**	**128,000**	**133,000**	**136,000**
Average Spend per Trip	$67.00	$67.00	$67.00	$67.00
Total Economic Benefit	**$7,437,000**	**$8,576,000**	**$8,911,000**	**$9,112,000**

Table 12: Shire of Chittering Day Trips Economic Spend 2010-2016

Chittering Visitor Centre Data[10]

Figure 40: Total Visitor Centre visitors by year 2013-2018

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[9] Tourism Research Australia, NVS Daytrips 1998 onwards, Summation Options by Reason for trip by Local Government Area (LGA), Calendar year, 9 Feb 2018, Space Time Research

[10] Visitor Numbers to Chittering Visitor Centre as recorded by volunteers and TPO 2013-18

Visitor Origins:

Local = Chittering residents

Perth = Greater Perth metropolitan area

Country = Outside Greater Perth, regional areas

East = Eastern States of Australia

Overseas = International visitor

Visitor Origin Overview
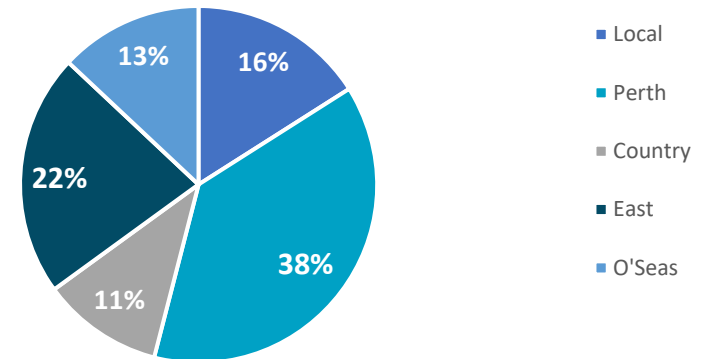
Figure 42: Annual Visitor Centre origins by percentage 2013-2018

Annual Visitor Centre Origins

Figure 41: Annual Visitor Centre origins 2013-2018

Destination Perth Tourism Visitation

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Destination Perth Overnight Visitor Summary

	YE Dec 2017	YE Dec 2018	% Change YE Dec 2018 – YE Dec 2017	3 Year AAGR^
Total				
Visitors	4,847,200	5,792,500	19.5%	8.8%
Nights	33,744,500	36,675,900	8.7%	0.2%
Domestic Total				
Visitors	3,943,100	4,876,500	23.7%	10.7%
Nights	12,626,200	16,917,300	34.0%	10.3%
Intrastate				
Visitors	2,814,800	3,536,900	25.7%	11.6%
Nights	6,847,700	9,776,200	42.8%	17.4%
Interstate				
Visitors	1,128,200	1,339,600	18.7%	8.3%
Nights	5,778,500	7,141,100	23.6%	2.4%
International				
Visitors	904,100	916,000	1.3%	0.1%
Nights	21,118,400	19,758,600	-6.4%	-6.6%

Source of Visitors

- Intrastate 59%
- Interstate 23%
- International 18%
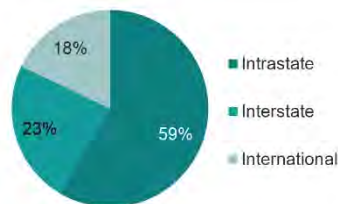
Average Length of Stay (Estimated nights)

	YE Dec 2016/17/18
Intrastate	2.6
Interstate	5.5
International	23.2
Total	**6.9**

Figure 43: Destination Perth Overnight Visitor Summary YE Dec 2018

Destination Perth Intrastate Visitor Summary

Western Australians travelling to / within Destination Perth
Based on visitor numbers – annual average of 2016, 2017 & 2018

Gender
- Male 50%
- Female 50%

Age
- 15-19 Years 7%
- 20-34 Years 27%
- 35-49 Years 23%
- 50-64 Years 26%
- 65+ Years 16%

Purpose of Visit*
- VFR 41%
- Holiday 33%
- Business 13%
- Other 13%

Travel Party
- Travelling alone 2%
- Adult couple 35%
- Friends / relatives 28%
- Family group 19%
- Business 17%
- Other 1%
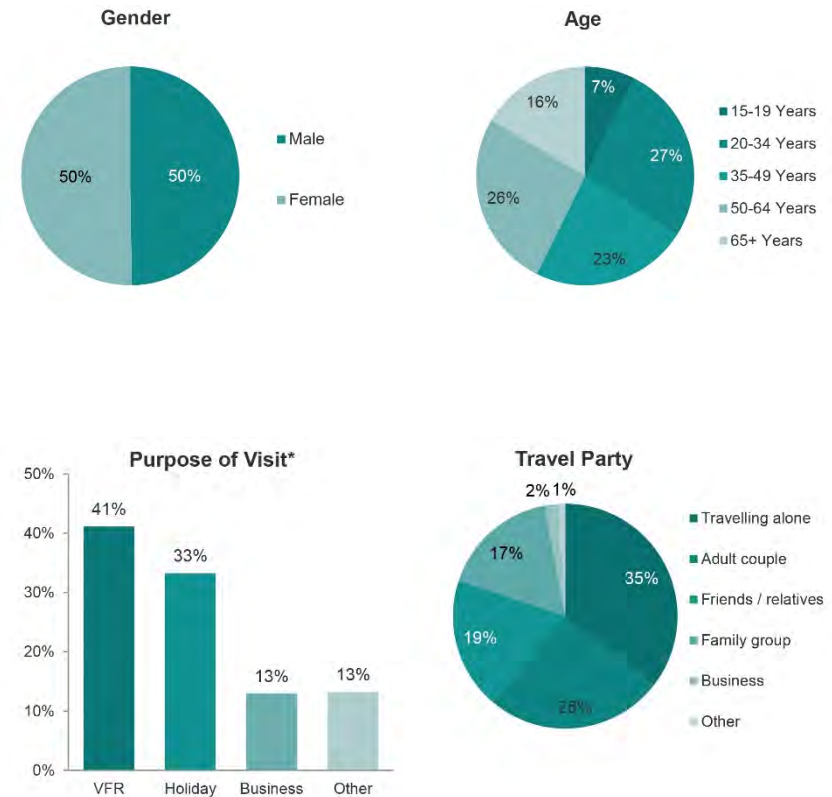
Figure 44: Destination Perth Intrastate Visitor Summary YE Dec 2018

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[11] Destination Perth 2018 Fact Sheet, Tourism WA - Strategy and Research, May 2019

Destination Perth Interstate Visitor Summary

Other Australians Travelling to Destination Perth
*Based on Visitor Numbers - Annual Average Of 2016, 2017 & 2018. Please note: Small sample size, caution should be used when reporting these estimates due to lower levels of reliability.

Gender

- Male 55%
- Female 45%

Age

- 15-19 Years 3%
- 20-34 Years 28%
- 35-49 Years 28%
- 50-64 Years 28%
- 65+ Years 13%

Purpose of Visit*

- Business 44%
- VFR 33%
- Holiday 22%
- Other 4%

Travel Party

- Travelling alone 42%
- Adult couple
- Business
- Friends / relatives 14%
- Family group 12%
- Other 10%
- 4%

Destination Perth International Visitor Summary

International visitors travelling to Destination Perth
*Based on visitor numbers – annual average of 2016, 2017 & 2018

Gender

- Male 49%
- Female 51%

Age

- 15-19 Years 3%
- 20-34 Years 32%
- 35-49 Years 25%
- 50-64 Years 27%
- 65+ Years 13%

Purpose of Visit*

- VFR 43%
- Holiday 42%
- Business 10%
- Other 11%

Travel Party

- Travelling alone 51%
- Adult couple 24%
- Family group 12%
- Friends / relatives 10%
- Business 3%
- Other 0%

Destination Perth Trip Information

Overnight visitors travelling in/to Destination Perth
Based on visitor numbers – annual average of 2016, 2017 & 2018

Top Five International Markets to EP

Please note: Base for % is from total estimated International visitor numbers to Destination Perth.

	YE Dec 2016/17/18 Average Annual Visitors	YE Dec 2016/17/18 %
United Kingdom	142,200	16%
Malaysia	105,400	12%
Singapore	97,400	11%
USA	74,500	8%
New Zealand	63,400	7%

Top Three Accommodation Choices in EP

Please note:
- *Accommodation* is a multiple response question. Totals may not add up to 100%.
- Base for % is from total estimated Intrastate, Interstate and International visitor numbers to Destination Perth.

	YE Dec 2016/17/18 %
Estimated Intrastate Visitors	
Friends or relatives property	56%
Hotel/resort/motel or motor Inn	21%
Rented house/apartment/flat or unit	5%
Estimated Interstate Visitors	
Hotel/resort/motel or motor Inn	56%
Friends or relatives property	35%
Rented house/apartment/flat or unit	7%
Estimated International Visitors	
Friends or relatives property	43%
Hotel/resort/motel or motor Inn	35%
Rented house/apartment/flat or unit	11%

Top Five Leisure Activities during Trip

Please note:
- Leisure Activities is a multiple response question. Totals may not add up to 100%.
- Base for % is from total estimated Intrastate, Interstate and International visitor numbers to Destination Perth.
- International visitors may have undertaken the activity in the region or elsewhere in Australia.

	YE Dec 2016/17/18 Average Annual Visitors	YE Dec 2016/17/18 %
Estimated Intrastate Visitors		
Visit friends & relatives	1,769,600	58%
Eat out / dine at a restaurant and/or cafe	1,669,500	54%
Go shopping for pleasure	732,900	24%
Sightseeing/looking around	531,200	17%
Pubs, clubs, discos etc	503,000	16%
Estimated Interstate Visitors		
Eat out / dine at a restaurant and/or cafe	925,100	77%
Sightseeing/looking around	350,100	29%
Go to the beach	330,000	27%
Go shopping for pleasure	298,000	25%
Pubs, clubs, discos etc	284,700	24%
Estimated International Visitors		
Eat out / dine at a restaurant and/or cafe	840,000	92%
Go shopping for pleasure	711,200	78%
Sightseeing/looking around	647,400	71%
Go to the beach	601,900	66%
Visit national parks / state parks	510,100	56%

Top Five Local Government Areas (LGAs) Visited

	YE Dec 2016/17/18 Average Annual Visitors	YE Dec 2016/17/18 %
Estimated Intrastate Visitors		
City of Perth	767,600	25%
City of Mandurah	360,800	12%
Shire of Murray	138,100	5%
City of Stirling	136,600	4%
City of Swan	124,500	4%
Estimated Interstate Visitors		
City of Perth	737,300	61%
City of Fremantle	110,700	9%
City of Stirling	64,900	5%
City of Rockingham	33,400	3%
City of Belmont	32,600	3%
Estimated International Visitors		
City of Perth	442,900	49%
City of Fremantle	67,600	7%
City of Stirling	56,900	6%
City of Canning	43,100	5%
City of Joondalup	41,200	5%

Figure 47: Destination Perth, Internationals, Accommodation, Activities YE Dec 2018

Wheatbelt Tourism Visitation

Figure 48: Wheatbelt Wildflowers and Glenfield Homestead – Image courtesy Tourism WA

Wheatbelt 2018 Visitor Factsheet[12]

The Wheatbelt is made up of 42 local government authorities:

Beverley	Kondinin	Tammin
Brookton	Koorda	Toodyay
Bruce Rock	Kulin	Trayning
Chittering	Lake Grace	Victoria Plains
Corrigin	Merredin	Wagin
Cuballing	Moora	Wandering
Cunderdin	Mt Marshall	West Arthur
Dalwallinu	Mukinbudin	Westonia
Dandaragan	Narembeen	Wickepin
Dowerin	Narrogin	Williams
Dumbleyung	Northam	Wongan Ballidu
Gingin	Nungarin	Wyalkatchem
Goomalling	Pingelly	Yilgarn
Kellerberrin	Quairading	York

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[12] Wheatbelt 2018 Visitor Factsheet, Tourism WA – Strategy and Research, May 2019

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Wheatbelt Overnight Visitor Summary

Overnight Visitors

	YE Dec 2016/17/18 Annual Average Visitors	YE Dec 2016/17/18 %
Estimated Visitors		
Intrastate	901,300	90%
Interstate	51,500	5%
International	53,800	5%
Total	**1,006,600**	**100%**
Estimated Visitor Nights		
Intrastate	2,161,700	75%
Interstate	265,700	9%
International	438,700	15%
Total	**2,866,100**	**100%**
Average Length of Stay (Estimated Nights)		
Intrastate	2.4	-
Interstate	5.2	-
International	8.2	-
Total	**2.8**	**-**

Visitors by Purpose

	YE Dec 2016/17/18 Annual Average Visitors	YE Dec 2016/17/18 %
Estimated Domestic Visitors		
Holiday	481,900	51%
Visiting friends and relatives	268,900	28%
Business	179,100	19%
Other	28,100	3%
Estimated International Visitors		
Holiday	44,700	83%
Visiting friends and relatives	7,000	13%
Business	1,400	3%
Other	1,300	2%

Figure 49: Wheatbelt Overnight Visitor Summary YE Dec 2018

Wheatbelt Visitor Profiles

Overnight visitors travelling to / within the Wheatbelt
Based on visitor numbers – annual average of 2016, 2017 & 2018

	YE Dec 2016/17/18 Annual Average Visitors	YE Dec 2016/17/18 %
Estimated Domestic Visitors		
Male	525,600	55%
Female	427,200	45%
Total	**952,800**	**100%**
Estimated International Visitors		
Male	26,400	49%
Female	27,400	51%
Total	**53,800**	**100%**

Visitors by Age

	YE Dec 2016/17/18 Annual Average Visitors	YE Dec 2016/17/18 %
Estimated Domestic Visitors		
15-19 Years	53,000	6%
20-34 Years	297,000	31%
35-49 Years	202,900	21%
50-64 Years	241,100	25%
65+ Years	158,700	17%
Total	**952,800**	**100%**
Estimated International Visitors		
15-19 Years	1,100	2%
20-34 Years	18,600	35%
35-49 Years	10,200	19%
50-64 Years	16,600	31%
65+ Years	7,200	13%
Total	**53,800**	**100%**

Figure 50: Wheatbelt Visitor Profiles YE Dec 2018

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Wheatbelt Trip Information

Overnight visitors travelling to / within the Wheatbelt
Based on visitor numbers – annual average of 2016, 2017 & 2018

Top Three Accommodation Choices

Please note:
- *Accommodation is a multiple response question. Totals may not add up to 100%.*
- Base for % is from total estimated Intrastate, Interstate and International visitor numbers to The Wheatbelt.

	YE Dec 2016/17/18 Annual Average Visitors	YE Dec 2016/17/18 %
Estimated Domestic Visitors		
Friends or relatives property	329,200	35%
Caravan or camping - non commercial	151,900	16%
Caravan park or commercial camping ground	138,200	15%
Estimated International Visitors		
Hotel/resort/motel or motor Inn	15,000	28%
Caravan park or commercial camping ground	13,800	26%
Friends or relatives property	8,100	15%

Travel Party

	YE Dec 2016/17/18 Annual Average Visitors	YE Dec 2016/17/18 %
Estimated Domestic Visitors		
Travelling alone	250,500	26%
Adult Couple	244,200	26%
Friends / relatives	221,100	23%
Family group - parent(s) and children	152,600	16%
Other	84,400	9%
Total	**952,800**	**100%**
Estimated International Visitors		
Adult couple	20,500	38%
Travelling Alone	18,500	34%
Family group - parent(s) and children	7,300	14%
Friends / relatives	6,900	13%
Other	600	1%
Total	**53,800**	**100%**

Western Australian Tourism Consumer Profiles[13]

Six new domestic consumer market segment profiles were identified by Tourism Western Australia in 2018. The segmentation model is aimed at providing:

- **Greater Insight:** In-depth understanding of the segments through use of multiple data sources and a commitment to on-going learning.

- **Greater Relevance:** Segments based on holiday behaviour and needs and prioritised based on bespoke criteria.

- **Greater Efficiency:** Detailed media and technology insights to inform media strategy and planning through to precision targeting.

Of the six market segments, the following three segments were identified as priorities for Western Australia:

- **Escape and Connect**

- **Bright Lights**

- **Off the Beaten Track**

Excerpts from *'Tourism WA's New Domestic Segmentation Model'* industry handbook have been provided to follow.

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[13] Tourism WA's New Domestic Segmentation Model, 2018

Escape and Connect

"I'm looking to disconnect to reconnect"

PERSONALITY

Escape & Connect travellers...

...value relationships and are socially active

...like to challenge themselves and be creative

...are passionate and busy with hobbies/interests

...have a strong interest in food, at home and out

...are motivated in their careers

...value fashion and style

DEMOGRAPHICS

Escape & Connect travellers cover a spread of ages, with a 50/50 split over and under the age of 50.

Age distribution
- 18-24
- 25-34
- 35-49
- 50-65
- 65+

They skew towards a higher socio-economic status.

PLANNING AND BOOKING
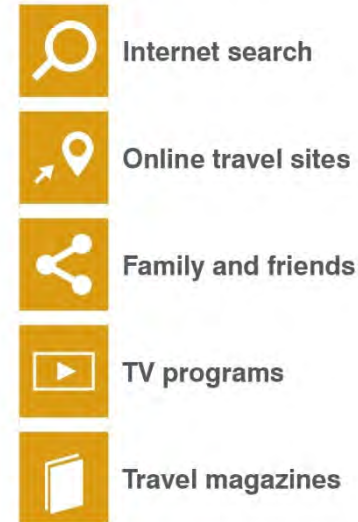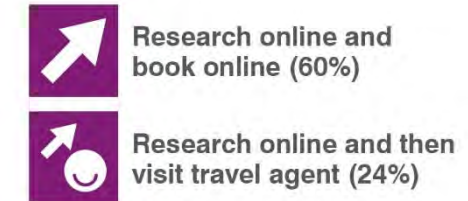
Planning enablers

- Internet search
- Online travel sites
- Family and friends
- TV programs
- Travel magazines

Booking actions

- Research online and book online (60%)
- Research online and then visit travel agent (24%)

Note: Only top 5 planning enablers and top 2 booking actions shown

ALIGNMENT WITH KEY THEMES

Theme	How to talk about it
Nature and Wildlife	A pristine, natural setting to reconnect
Aquatic and Coastal	Serenity, peace – the feeling it gives
Food and Wine	Quality experiences

HOLIDAY NEEDS AND BEHAVIOUR

Escape & Connect travellers are looking to disconnect and have a complete break from all their responsibilities and worries when travelling.

For this segment, **holidays are a chance to reconnect with their partner** and spend quality time with them.

While on holiday, this segment **enjoys food and wine experiences, sightseeing,** and experiences that allow them to completely relax and unwind.

The absolute price is less of a concern for this segment when travelling – they are willing to pay more for a quality experience.

Compared to other travellers, **they are more likely to choose higher end accommodation** (4 or 5 star hotels) and have a higher average spend per trip.

BARRIERS TO VISITING WA

Interstate

Escape & Connect travel more often than the other travellers do, both overseas and within Australia, and enjoy travelling to new places. While this is an opportunity for WA, it is also a threat – Escape & Connect travellers are open to visiting WA, but many other destinations are also on their bucket list. To effectively compete against other destinations, raising knowledge of WA experiences that meet their travel needs and desires is critical.

⭐ 1. Knowledge of WA   📊 2. Cost (affordability)   ⚫ 3. Time (accessibility)

Intrastate

To encourage intrastate visitation, destinations and experiences that foster the opportunity to escape the hustle and bustle, disconnect, and reconnect with loved ones should be highlighted.

Figure 52: Tourism Consumer Profile – Escape and Connect

Bright Lights

"I live life at 100 miles an hour, I want to have as many experiences as possible"

PERSONALITY

Bright Lights travellers...

...are success, status, and achievement driven

...enjoy their fast-paced life

...careers are a big part of their life

...like going out regularly for dining and events

...are very social with friends and popular

...like to be noticed and keep up with trends

DEMOGRAPHICS

Bright Lights skew towards a younger demographic, with 70% aged under 50, and skew towards male (60% male, 40% female).

Age distribution

- 18-24
- 25-34
- 35-49
- 50-65
- 65+
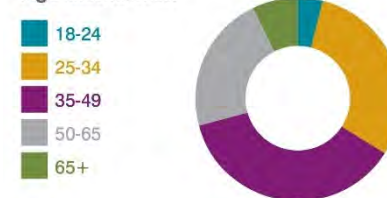
They have a high socio-economic status, above average discretionary spend.

PLANNING AND BOOKING

Planning enablers

- Internet search
- Online travel sites
- Family and friends
- Travel agents
- TV programs

Booking actions

- Research online and book online (53%)
- Research online and then visit travel agent (20%)

Note: Only top 5 planning enablers and top 2 booking actions shown

ALIGNMENT WITH KEY THEMES

Theme	How to talk about it
Nature and Wildlife	Density and diversity of experiences
Aquatic and Coastal	"Wow" factors that are worth bragging about (e.g. whitest white, bluest blue)
Food and Wine	Entertainment and socialising (Restaurants and bars)

HOLIDAY NEEDS AND BEHAVIOUR

Travel for Bright Lights is a chance to **reward themselves** for all their hard work, through a bit of **luxury and indulgence.**

They are more likely to visit cities, rather than regional areas, and are more likely than other travellers to travel with friends (although travelling with a partner or immediate family remains most common).

While on holiday, this segment likes to have **as many experiences as possible,** and are more likely than other travellers to engage in social activities and be 'out and about' such as attending **sporting events, going shopping, and enjoying night life.**

If they aren't staying with friends or family, Bright Lights choose to stay in **4 or 5 star accommodation,** and they have a **higher average spend** per trip than other travellers.

BARRIERS TO VISITING WA

Interstate

Bright Lights are open to visiting WA, but the biggest barrier preventing visitation is a lack of knowledge of the experiences and products on offer that can meet their travel needs. Additionally, the perceived accessibility of WA in terms of distance and time to travel is a barrier, and while absolute cost is less of an issue due to their high discretionary income, value for money remains important to this segment.

- 1. Knowledge of WA
- 2. Time (accessibility)
- 3. Cost (affordability)

Intrastate

To encourage intrastate visitation, it is important to highlight the density and diversity of experiences on offer in a destination so this segment knows there will be enough to see and do to keep them entertained.

Figure 53: Tourism Consumer Profile – Bright Lights

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Off the Beaten Track

"I enjoy the simple pleasures in life, getting away from crowds and back to nature"

PERSONALITY

Off the Beaten Track travellers...

...love the outdoors especially hiking and camping

..seek the best value for money

...are practical and carefully make decisions

...have a lot of free time but keep active with hobbies

...are not too fussed about socialising/ shopping/ restaurants

...are environmental and love the simple life

DEMOGRAPHICS

Off the Beaten Track skew towards an older demographic, and are most likely to be empty nesters or have grown-up children (16 years or older) at home.

Age distribution
- 18-24
- 25-34
- 35-49
- 50-65
- 65+
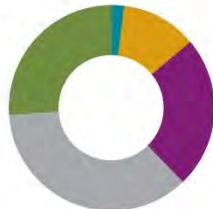
Have a mid to high socio-economic status, but are careful with their spending and limit their discretionary expenditure.

PLANNING AND BOOKING
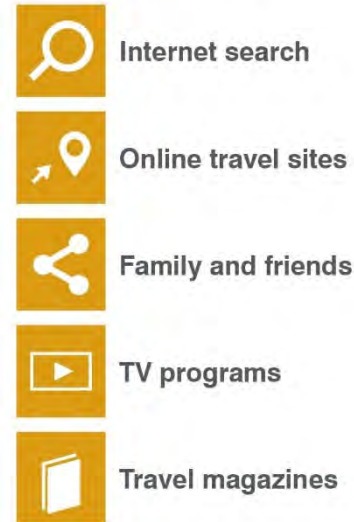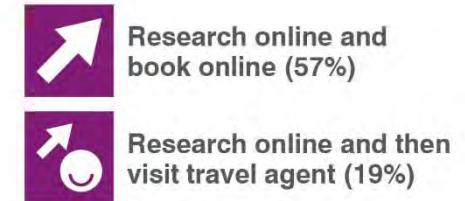
Planning enablers

- Internet search
- Online travel sites
- Family and friends
- TV programs
- Travel magazines

Booking actions

- Research online and book online (57%)
- Research online and then visit travel agent (19%)

Note: Only top 5 planning enablers and top 2 booking actions shown

ALIGNMENT WITH KEY THEMES

Theme	How to talk about it
Nature and Wildlife	*Vastness, nobody around, exploration*
Aquatic and Coastal	*Unique marine wildlife*
Food and Wine	*A means to learn about the destination (e.g. Aboriginal experience)*

HOLIDAY NEEDS AND BEHAVIOUR

Travel for this segment is about **avoiding crowds and 'touristy' destinations,** and discovering what's *off the beaten track*.

Holidays are all about **nature and wildlife experiences**, particularly those that are unique, and balancing active, outdoor adventures with peace and relaxation.

Compared to other travellers, they are **more likely to holiday within Australia** and less likely to travel overseas, and have a preference for regional destinations (rather than cities).

They are most likely to **stay in standard hotel/motels or resorts,** with friends and family, or in caravanning and camping accommodation.

This segment **thinks through their travel decisions carefully,** and want to know they are getting the best value for money, without wasting money on extras.

BARRIERS TO VISITING WA

Interstate

Relative to other travellers, Off the Beaten Track travellers have greater knowledge of WA holiday experiences, and almost half have previously visited. However, the biggest barrier preventing Off the Beaten Track travellers from visiting (or revisiting) is the perceived affordability of travelling to and around WA. The accessibility of WA in terms of the time it takes to travel there is also a barrier. To overcome these barriers and convince the segment that a trip to WA is 'worth it', there's opportunity to further build on the segment's current knowledge of WA.

1. Knowledge of WA 2. Time (accessibility) 3. Cost (affordability)

Intrastate

To encourage intrastate visitation, the unique and 'undiscovered' nature and wildlife experiences on offer in WA should be highlighted, while raising the perceived affordability and accessibility of travelling within the State.

Figure 54: Tourism Consumer Profile – Off the Beaten Track

Family Fun

"My life revolves around finding the best solutions for my family. I want to create awesome memories for us all to remember for a long time to come."

PERSONALITY

Family Fun travellers...

...live a traditional, busy family life

...like convenience and routine to maximise family time

...are bargain hunters and budget conscious

...enjoy shopping, days out with their family, sports, and cooking

DEMOGRAPHICS

Family Fun are most likely to be parents and have children under the age of 16 living in their household.

Age distribution
- 18-24
- 25-34
- 35-49
- 50-65
- 65+
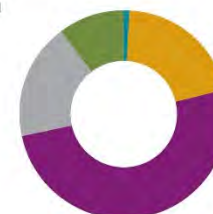
Half of the segment are aged between 35 and 49. They have a mid to high socio-economic status, but are careful with their spending.

PLANNING AND BOOKING

Planning enablers

- Internet search
- Family and friends
- Online travel sites
- TV programs
- Travel agents

Booking actions

- Research online and book online (67%)
- Research online and then visit travel agent (16%)

Note: Only top 5 planning enablers and top 2 booking actions shown

ALIGNMENT WITH KEY THEMES

Theme	How to talk about it
Nature and Wildlife	Spending time in the great outdoors as a family
Aquatic and Coastal	Enjoying time at the beach and family-friendly coastal activities
Food and Wine	Convenient and satisfying experiences that the whole family will enjoy

HOLIDAY NEEDS AND BEHAVIOUR

Holidays for this segment are all about **having fun as a family.**

Family Fun are more likely than other travellers to **visit the same destination year after year** are more likely to travel within Australia than overseas.

This segment values **ease and convenience** when holidaying and seek out destinations, facilities, and experiences that are family-friendly.

Coastal and self-drive holidays are particularly appealing to this segment.

Value for money is very important to Family Fun travellers – they want to know they are getting the best bang for their buck.

If they aren't staying with friends or family, they are most likely to **stay in a standard hotel** or **self-contained apartment.**

BARRIERS TO VISITING WA

Interstate

Relative to other travellers, Family Fun do not travel as frequently and do not spend as much when holidaying. Affordability and not having to travel too far is very important for this segment when selecting their holiday destination, so visitation to WA from interstate markets is unlikely. In order of importance:

1. Cost (affordability)
2. Time (accessibility)
3. Knowledge of WA

Intrastate

To encourage intrastate visitation to WA's tourism regions, messages around the affordability and accessibility of WA's best family friendly destinations and experiences should be communicated.

Figure 55: Tourism Consumer Profile – Family Fun

Relax and Rewind

"Life is all about keeping it simple and easy for ourselves. We're at a time in our lives when we want to take it nice and slow."

PERSONALITY

Relax & Rewind travellers...

...take life slowly and enjoy the simple pleasures

...seek peace and comfort in their lives

...keep active with light exercise like walking, golf, and Pilates.

... are conscientious, assertive, risk-averse and resistant to change

...have a lot of spare time and enjoy home-time with pets and partner

DEMOGRAPHICS

The majority of Relax & Rewind are aged 50+ and are most likely to be empty nesters or have grown-up children (aged 16 or above) in their household.

Age distribution
- 18-24
- 25-34
- 35-49
- 50-65
- 65+

Skew towards mid to low socio-economic status, and are medium to light spenders.

PLANNING AND BOOKING
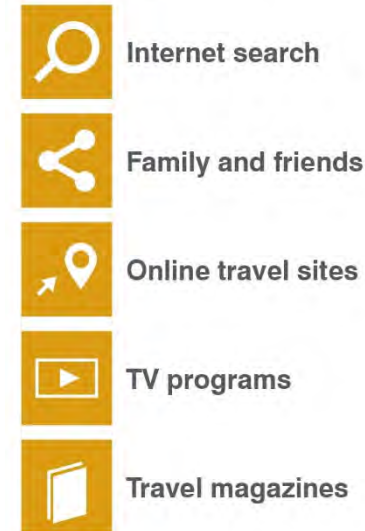
Planning enablers

Internet search

Family and friends

Online travel sites

TV programs

Travel magazines

Booking actions

Research online and book online (57%)

Research online and then visit travel agent (20%)

Note: Only top 5 planning enablers and top 2 booking actions shown

ALIGNMENT WITH KEY THEMES

Theme	How to talk about it
Nature and Wildlife	Ease and simplicity of being amongst nature
Aquatic and Coastal	Peace and tranquillity – the feeling it gives
Food and Wine	A chance to connect with partner

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HOLIDAY NEEDS AND BEHAVIOUR

Holidays for this segment are all about **relaxing, unwinding, and spending time with their partner.**

They want a **complete break from all their responsibilities and worries** when travelling – it should be easy and hassle free.

When travelling, they enjoy balancing their **rest and relaxation** with **sightseeing, food and wine experiences**, and some shopping.

They are most likely to stay in **4 star or standard hotel** accommodation or with friends and family.

Affordability is a major consideration for this segment when choosing their travel destination, and they have a below average spend per trip.

BARRIERS TO VISITING WA

Interstate

Relax & Rewind don't want to travel too far for their short breaks or holidays, and affordable pricing is important to this segment. The traditional barriers to visiting WA – cost and time – are significant for this segment from an interstate perspective.

1. Cost (affordability)
2. Time (accessibility)
3. Knowledge of WA

Intrastate

To encourage intrastate visitation, it is important to communicate the affordability and accessibility of a holiday in WA that will meet their needs for ease and relaxation, should be communicated. Affordable experiences that are easy to plan and book should be highlighted.

Figure 56: Tourism Consumer Profile – Relax and Rewind

Culture Vultures

"I am loving having a bit more time back in my life, time to explore, time to learn again!"

PERSONALITY

Culture Vulture travellers...

...are life-long learners who are keen to try new things

...value fashion, style, status, and success

...enjoy travelling, art and culture, entertaining, and socialising with friends

...are health conscious and stay active and eat healthily

...like to challenge themselves and believe in taking risks

...are happy to pay for quality and spend more to save time

DEMOGRAPHICS

Culture Vultures skew towards an older demographic (60% aged 50+).

Age distribution

- 18-24
- 25-34
- 35-49
- 50-65
- 65+
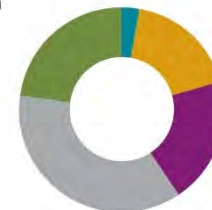
They have a high socio-economic status and are big spenders.

PLANNING AND BOOKING

Planning enablers

- Internet search
- Online travel sites
- Family and friends
- Travel magazines
- TV programs

Booking actions

- Research online and book online (57%)
- Research online and then visit travel agent (20%)

Note: Only top 5 planning enablers and top 2 booking actions shown

ALIGNMENT WITH KEY THEMES

Theme	How to talk about it
Nature and Wildlife	Links between land and history
Aquatic and Coastal	Unique or surprising elements
Food and Wine	A means to learn about the destination (e.g. Aboriginal experience)

HOLIDAY NEEDS AND BEHAVIOUR

Travel is a big part of Culture Vulture's lives, particularly overseas travel.

Holidays for this segment are all about **discovery and learning** – seeing and doing new things.

They are fascinated and **feel enriched by experiencing other cultures**.

When travelling, this segment enjoy **sightseeing, learning about a destination's history and heritage,** visiting cultural attractions or attending cultural events, and experiencing local food and wine.

They are most likely to stay in **4 star or standard hotel accommodation** or with friends and family.

Price is less of a concern for this segment and they typically spend more than most other travellers when holidaying.

BARRIERS TO VISITING WA

Interstate

The biggest barrier preventing Culture Vultures from visiting WA is a perception that a holiday in WA would not meet their core travel needs. This is exacerbated by strong competition – particularly from overseas destinations. Absolute cost is less of an issue for this segment but the perceived value of a trip remains important.

- 1. Knowledge of WA
- 2. Time (accessibility)
- 3. Cost (affordability)

Intrastate

To encourage intrastate visitation from this segment, it is important to highlight the historical and cultural experiences in WA that will allow the segment to experience something different and learn something new.

Figure 57: Tourism Consumer Profile – Culture Vultures

Section 10:

Demographics
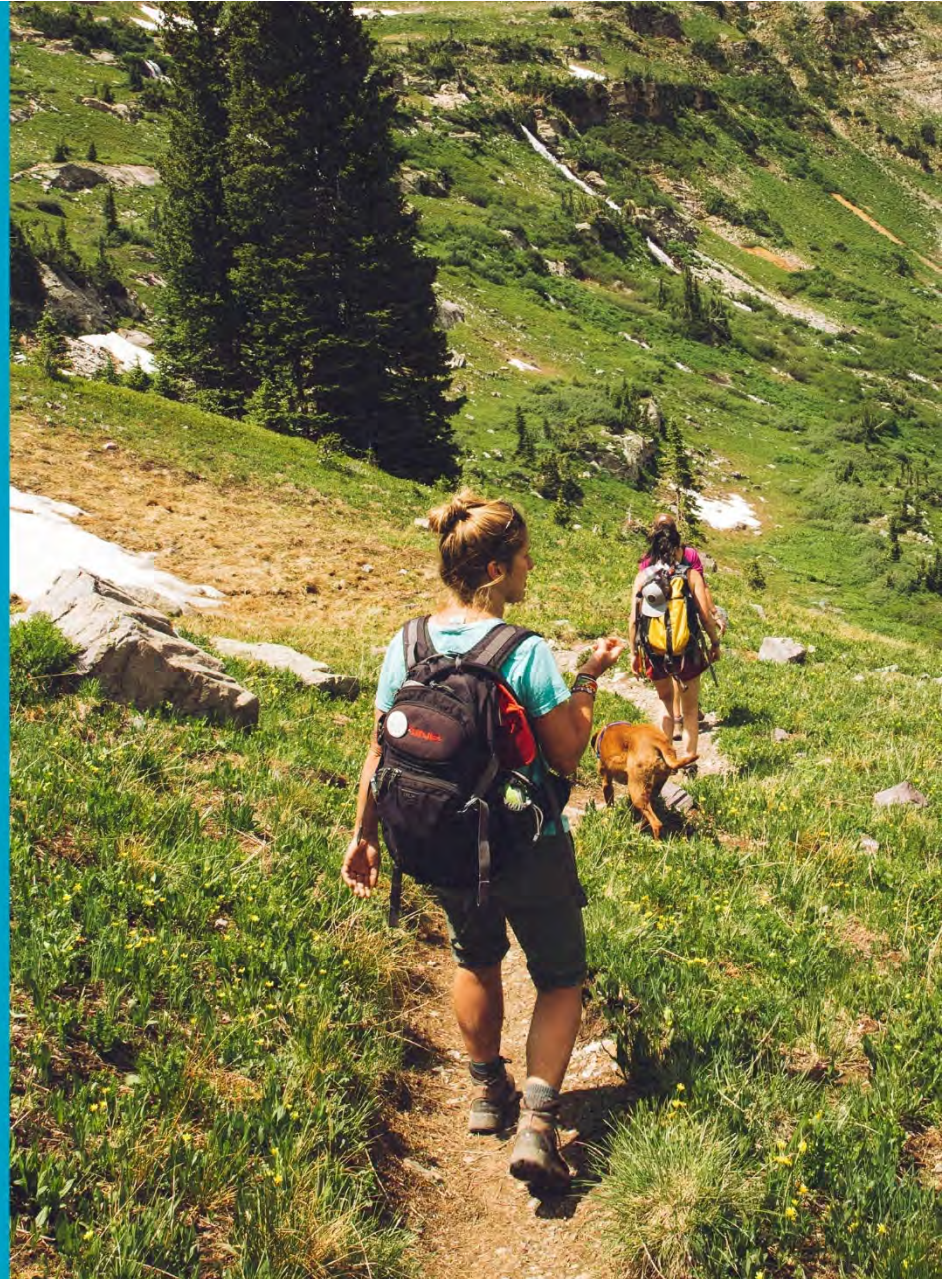
10. Demographics

Both the Shire of Chittering (Local Government Area) and the locality of Bindoon (State Suburb) have recorded a significant growth in population in the 2011 and 2016 Australian Bureau of Statistics Census data:

- At 2016, the estimated resident population of the Chittering Local Government Area was 5,472 people (up 24.84% on 2011); 1,521 families; 2,206 private dwellings; and the median age was 43 years[14]

- At 2016, the estimated resident population of Bindoon was 1,183 people (up 11.28% on 2011); 325 families; 554 private dwellings; and the median age was 45 years[15]

Shire of Chittering Demographics

2016 Census Community Profile – Chittering Local Government Area[16]

People:	**5,472**
Male:	50.8%
Female:	49.2%
Median:	43

Families		**1,521**
Average children per family		
-	for families with children	1.9
-	for all families	0.8

All private dwellings	**2,206**
Average people per household	2.8
Median weekly household income	$1,640
Median monthly mortgage repayments	$2,167
Median weekly rent	$270
Average motor vehicles per dwelling	2.7

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[14] ABS, 2016 Census QuickStats, Chittering (S), WA, Local Government Area

[15] ABS, 2016 Census QuickStats, Bindoon (SSC), WA, State Suburb

[16] ABS, 2016 Census QuickStats, Chittering (S), WA, Local Government Area

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2016 Census Community Profile – Bindoon State Suburb[17]

	People:	1,183
	Male:	50%
	Female:	50%
	Median:	45

	Families	325
	Average children per family	
	- for families with children	1.8
	- for all families	0.6

	All private dwellings	554
	Average people per household	2.4
	Median weekly household income	$1,064
	Median monthly mortgage repayments	$1,751
	Median weekly rent	$298

Average motor vehicles per dwelling   2.3

Chittering Target Market Snapshot

Shire of Chittering Population / Target Market Snapshot:[18]	
Estimated Resident Population - Persons - Total *(no.)*	**5,472**
Estimated Resident Population - Median Age, Usual Residents *(years)*	**43**
Estimated Resident Population - Persons - 5 to 19 years of age *(schools, sports, outdoor recreation markets)*	**1,193**
Estimated Resident Population - Persons - 25 to 49 years of age *(largest cohort of mountain bike riders by statistical age group in WA)*	**1,658**

Table 13: Shire of Chittering target demographics

Greater Perth Demographics

The Greater Perth area includes the boundaries of the Shire of Yanchep to the north, the Shires of Mundaring and Murray to the east, and the Shire of Pinjarra and City of Mandurah to the south.

2016 Census Community Profile – Greater Perth[19]

	People:	1,943,858
	Male:	49.6%

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[17] ABS, 2016 Census QuickStats, Bindoon (SSC), WA, State Suburb

[18] ABS, 2016 Census QuickStats, Chittering (S), WA, Local Government Area, at 30 June 2016

[19] ABS, 2016 Census Quick Stats, Greater Perth

Female:		50.4%
Median:		Age 36

Families 515,328

Average children per family

- for families with children 1.8
- for all families 0.8

All private dwellings 818,081

Average people per household 2.6

Median weekly household income $1,643

Median monthly mortgage repayments $2,000

Median weekly rent $360

Average motor vehicles per dwelling 1.9

Note: The estimated resident population for Greater Perth at the end of 2018 was 2,059,484[20]

Greater Perth Demographics[21]

The median age of people in Greater Perth (Greater Capital City Statistical

Areas) was 36 years. The 5 – 19 years mountain biking school/education/sports groups target market made up 18.7% of the population (363,743 people), and the 26 – 49 years (largest cohort of mountain bikers in Western Australia aged between 26 and 50[22] and a key target market) made up 40.3% of the population (783,483 people).

*Total target demographics
in Greater Perth
aged 5 to 49:*

1,210,660 people

*Note: mountain bikers in Western Australia are predominantly male which make up 49.6% of the Greater Perth resident population

Demographics by Age *Core target demographics in Greater Perth highlighted*				
Age	**Greater Perth**	**%**	**WA**	**%**
Median age	36	--	36	--
0-4 years	126,713	6.5	161,727	6.5
5-9 years	**126,833**	**6.5**	164,153	6.6
10-14 years	**116,781**	**6.0**	150,806	6.1
15-19 years	**120,129**	**6.2**	149,997	6.1
20-24 years	**133,434**	**6.9**	160,332	6.5

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[20] idCommunity – Greater Perth Community Profile 2018

[21] ABS, 2016 Census, Greater Perth, 5GPER (GCCSA), People – Demographics and Education

[22] WA Mountain Bike Strategy 2015-2020: Participation, WestCycle

Demographics by Age *Core target demographics in Greater Perth highlighted*

Age	Greater Perth	%	WA	%
25-29 years	150,329	7.7	184,908	7.5
30-34 years	156,352	8.0	194,267	7.9
35-39 years	137,621	7.1	173,041	7.0
40-44 years	134,986	6.9	171,996	7.0
45-49 years	134,195	6.9	172,520	7.0
50-54 years	124,498	6.4	162,438	6.6
55-59 years	113,020	5.8	149,899	6.1
60-64 years	99,944	5.1	132,145	5.3
65-69 years	88,770	4.6	116,755	4.7
70-74 years	63,597	3.3	82,911	3.4
75-79 years	48,038	2.5	61,509	2.5
80-84 years	33,960	1.7	42,590	1.7
85 years and over	34,652	1.8	42,420	1.7

Table 14: Greater Perth target market demographics

Demographics by Education Type[23]

In Greater Perth, 31.1% of people were attending an educational institution. Of these, 27.1% were in primary school, 20.7% in secondary school and 22.8% were in a tertiary or technical institution.

Education groups are a key mid-week visitation target market for a Mountain Bike and Adventure Park

Demographics by Education Type
Core target demographic in Greater Perth highlighted

Education	Greater Perth	%	WA	%
Preschool	23,779	3.9	30,247	3.9
Primary - Government	111,571	18.4	144,988	18.9
Primary - Catholic	29,164	4.8	36,865	4.8
Primary - other non-Government	23,411	3.9	28,046	3.7
Secondary - Government	66,647	11.0	88,176	11.5
Secondary – Catholic	28,459	4.7	34,065	4.4
Secondary - other non-Government	30,367	5.0	34,773	4.5
Technical or further education institution	38,142	6.3	46,835	6.1
University or tertiary institution	99,590	16.5	106,811	13.9
Other	16,011	2.6	18,547	2.4
Not stated	137,920	22.8	197,644	25.8

Table 15: Greater Perth target education sector demographics

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[23] ABS, 2016 Census, Greater Perth, 5GPER (GCCSA), People – Demographics and Education

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Demographics by Family Composition[24]

Of the families in Greater Perth, 46.3% were couple families with children, 37.5% were couple families without children and 14.5% were one parent families.

Demographics by Family Composition *Core target demographics in Greater Perth highlighted*				
Family Composition	**Greater Perth**	**%**	**WA**	**%**
Couple family without children	193,034	37.5	247,841	38.5
Couple family with children	**238,521**	**46.3**	292,133	45.3
One parent family	74,556	14.5	93,344	14.5
Other family	9,214	1.8	10,869	1.7

Table 16: Greater Perth family composition demographics

Greater Perth Regional Population Growth[25]

In 2017-18, the ten suburbs with the largest population increases in Western Australia were all within Greater Perth. The suburb of Baldivis, in Perth's south-west, had the largest growth in terms of absolute numbers, increasing by 2,240 to reach 38,342 people. Large growth also occurred in Forrestdale - Harrisdale - Piara Waters (2,115) in Perth's south-east, Ellenbrook (2,076) north-east of the city, and Alkimos - Eglinton (1,531) in the north-west.

Alkimos - Eglinton was the fastest-growing suburb in Western Australia in 2017-18, up by 14%. This was followed by the coastal area of North Coogee (11%) in Perth's south-west, Forrestdale – Harrisdale - Piara Waters (9%) and Casuarina - Wandi, in the south-west (8%).

Specifically, in the North East and North West statistical areas of Greater Perth, the largest and fastest growing suburbs in 2017-2018[26] are outlined in the tables below.

Largest Population Growth Suburbs in Western Australia				
Suburb	**Area**	**2018**	**Increase #**	**%**
Alkimos - Eglinton	Perth - North West	11,874	1 531	14.8
The Vines	Perth - North East	11,810	811	7.4
Ellenbrook	Perth - North East	41,382	2 076	5.3
Madeley - Darch - Landsdale	Perth - North West	28,254	881	3.2

Fastest Population Growth Suburbs in Western Australia				
Suburb	**Area**	**2018**	**Increase #**	**%**
Alkimos - Eglinton	Perth - North West	11,874	1 531	14.8
The Vines	Perth - North East	11,810	811	7.4
Two Rocks	Perth - North West	3,376	191	6.0
Yanchep	Perth - North West	10,399	558	5.7

Table 17: Largest and fastest growth suburbs in Greater Perth

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[24] ABS, 2016 Census, Greater Perth, 5GPER (GCCSA), People – Demographics and Education

[25] ABS, 3218.0 - Regional Population Growth, Australia, 2017-18

[26] ABS, 3218.0 - Regional Population Growth, Australia, 2017-18

Large and fast population growth areas are particularly attractive to young families with new housing estates, schools, recreational and sporting needs, therefore the suburbs highlighted in the North West and North East statistical areas of Greater Perth above have been identified as future target market localities for a mountain bike and adventure park in Bindoon.

Chittering Education Data[27]

In the Chittering Local Government Area, 31.5% of people were attending an educational institution in 2016. Of these, 27.0% were in primary school, 25.6% in secondary school and 10.4% in a tertiary or technical institution.

Chittering Education Data		
Education Type	**Chittering (S)**	**%**
Preschool	71	4.1
Primary - Government	326	18.8
Primary - Catholic	73	4.2
Primary - other non-Government	69	4.0
Secondary - Government	220	12.7
Secondary – Catholic	140	8.1
Secondary - other non-Government	91	5.2
Technical or further education institution	78	4.5
University or tertiary institution	102	5.9
Other	28	1.6
Not stated	538	31.0

Table 18: Chittering resident education data

Public and Non-Government Schools Data[28]

The following public and non-government school reports were developed by the Western Australian Department of Education for 2018 Semester 2 and provide an insight to schools, student numbers and cohorts as potential education, outdoor recreation and sporting group target markets for a Mountain Bike Park in Bindoon.

1. Public Schools and Students by Education Region - 2018 Semester 2
2. Non-Government Schools by Religious Affiliation & Education Region - 2018 Semester 2
3. Full-Time Primary and Secondary Enrolments by Year Level, Public and Non-Government Schools 2009 to 2018
4. Summary Statistics of Schools and Full-Time Students – August 2018
5. Public Schools by Size(a) and Classification - 2018 Semester 2

Public Schools and Students in Perth Metropolitan Area, 2018 Semester 2				
Region	**# of Schools**	**Primary Students**	**Secondary Students**	**Total**
North Metropolitan	245	72,781	37,412	110,193
South Metropolitan	258	82,048	42,361	124,409
Total	**503**	**154,829**	**79,773**	**234,602**

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[27] ABS, 2016 Census QuickStats, Chittering (S), WA, Local Government Area

[28] Western Australian Department of Education. 2018 Semester 2 Schools Data Reports

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Non-Government Schools and Students in Perth Metropolitan Area, 2018 Semester 2				
Region	**# of Schools**	**Primary Students**	**Secondary Students**	**Total**
North Metropolitan	109	32,609	35,986	68,595
South Metropolitan	107	29,693	26,908	56,601
Total	**216**	**62,302**	**62,894**	**125,196**

Participation in Sport & Physical Recreation, WA 2013-2014[29]

The following data details the sex and age of persons participating in sport and recreation activities in Western Australia.

ESTIMATE ('000)	WA	Australia
Participation Rate (numbers)		
Males		
15–17 years	43.3	315.4
18–24 years	80.9	755.1
25–34 years	149.1	1,123.7
35–44 years	113.7	986.6
45–54 years	116.6	924.1
55–64 years	85.6	712.1
65 years and over	74.0	735.6

ESTIMATE ('000)	WA	Australia
Total male participants	*659.8*	*5,550.6*
Females		
15–17 years	30.3	348.4
18–24 years	84.3	679.2
25–34 years	131.8	1,022.5
35–44 years	111.4	1,071.0
45–54 years	107.8	946.2
55–64 years	82.8	757.5
65 years and over	76.5	756.8
Total female participants	*611.9*	*5,569.0*

ESTIMATE ('000)	WA	Australia
Participation Rate (numbers)		
Persons		
15–17 years	75.7	663.6
18–24 years	159.4	1,436.4
25–34 years	282.3	2,144.0
35–44 years	220.3	2,052.3
45–54 years	215.3	1,870.3
55–64 years	168.3	1,474.6
65 years and over	150.8	1,495.5
Total participants	*1,268.8*	*11,122.1*
Participation Rate (%)		
Males		
15–17 years	71.6	72.8
18–24 years	67.6	67.7
25–34 years	70.9	67.3

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[29] ABS, 41770DO001_201314 Participation in Sport and Physical Recreation, Australia, 2013-14

ESTIMATE ('000)	WA	Australia
35–44 years	66.4	63.3
45–54 years	68.2	61.9
55–64 years	63.8	54.5
65 years and over	51.4	48.3
Total male participants	*66.1*	*61.0*
Females		
15–17 years	61.6	74.8
18–24 years	70.6	67.0
25–34 years	67.3	60.6
35–44 years	61.5	66.1
45–54 years	64.2	60.8
55–64 years	60.7	56.4
65 years and over	48.1	44.8
Total female participants	*60.8*	*59.4*

ESTIMATE ('000)	WA	Australia
Participation Rate (%)		
Persons		
15–17 years	85.1	73.8
18–24 years	65.8	67.2
25–34 years	69.3	63.9
35–44 years	62.5	64.6
45–54 years	63.8	61.4
55–64 years	62.3	55.6
65 years and over	49.6	46.6
Total participants	*63.0*	*60.2*

Figure 58: Public and Non-Government Schools Data

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Section 11:

Mountain Bike Industry Snapshot

11. Mountain Bike Industry Snapshot

It has been commonly reported that mountain biking is one of the world's fastest growing recreational, sport and tourism activities and Western Australia is following this global trend.

In 2015, WestCyle, the peak industry body for cycling in Western Australia, (inclusive of WAMBA, the Western Australian Mountain Bike Association), released the Western Australian Mountain Bike Strategy 2015-2020 stating:

'The recent rapid rise of mountain biking now provides Western Australia with a unique opportunity to grow and evolve into a world-class mountain bike destination.

This will support the growth and diversification of the state's recreation sector and tourism industry whilst also securing meaningful economic and social outcomes for our local and regional communities'.

Since the release of this document, a myriad of mountain bike trail strategies, plans, projects and guidelines has been developed by the mountain biking sector, industry organisations, Local Government Authorities and State Government Agencies in response to a rapidly growing demand for mountain bike trails across Australia.

Key publications have been acknowledged as an authoritative base upon which this research study has been undertaken.

These documents include:

- **WA Mountain Bike Strategy 2015-2020** [WestCycle]

- **WA Mountain Bike Management Guidelines** [WA Department of Local Government, Sport and Cultural Industries; WestCycle; West

Australian Mountain Bike Association]

- **Australian Mountain Bike Trail Guidelines 2019** [Mountain Bike Australia]

Figure 59: Western Australian Mountain Bike Strategy 2015-2020

Consultation with WestCycle identified the development of mountain bike trails in Perth and surrounds are a priority as the demand for sanctioned, quality mountain bike trails far outweighs the supply… [30]
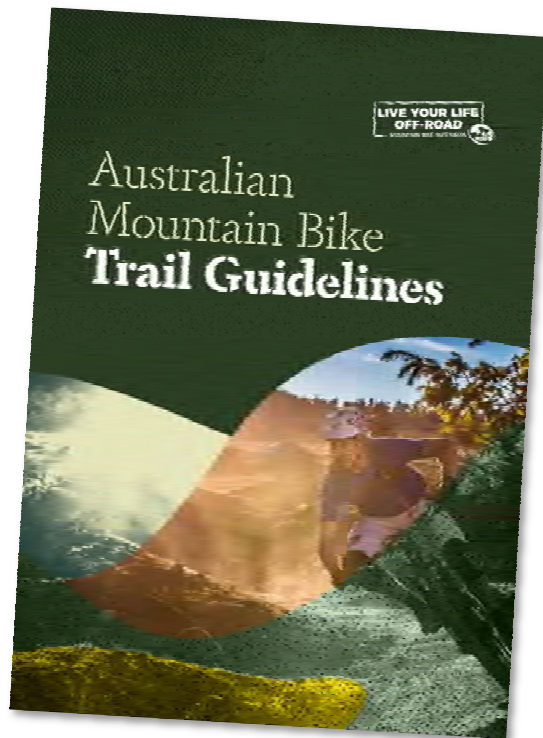
Figure 60: Australian Mountain Bike Trail Guidelines 2019

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[30] Matt Fulton, CEO WestCycle, May 2019

Mountain Biking Participation in WA[31]

The Western Australian Mountain Bike Strategy 2015-2020 developed by peak industry body WestCycle, has provided detailed data of participation in mountain biking and related events and competitions throughout the State.

There is an under-representation of young people and women participating in mountain biking across all aspects of the sport from riding and racing to coaching, officiating, governance and trail delivery.

Barriers to mountain biking participation include:

- Limited understanding of the benefits of mountain biking
- Perceptions about mountain biking
- Lack of knowledge of the trails available within the state
- Limited availability and accessibility of different styles of trail offering different levels of technical difficulty, including trails for beginners/less skilled riders
- Undersupply of trails within or in close proximity to population centres
- The significant time and distances necessary to travel to ride
- Shortage of trails accessible by transport other than private vehicle
- Restricted availability of opportunities for skill-building and progression
- Limited availability of bike and equipment hire providers
- Limited availability of trained mountain bike guides

Sources for the graphic [pictured right] from the WestCycle Strategy include the Australian Bicycle Council; Cape to Cape; Cycling Australia; Dwellingup 100; Retail Cycle Traders Australia; Single Track Minds; UCI; and WA Mountain Bike Association.

Figure 61: Western Australian Mountain Bike Strategy 2015-2020, WestCycle

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[31] Western Australian Mountain Bike Strategy 2015-2020, WestCycle

Mountain Bike Trails, Facilities & Infrastructure

Trails WA is an independent for purpose organisation that exists to facilitate advocacy for and the marketing of a high-quality trails network across Western Australia. Trails WA identifies over 40 sanctioned mountain bike trails (some independent, others part of trail networks) in Western Australia.[32] *Note: Less than a quarter of single-track trails in WA are sanctioned*

The majority of trails in Western Australia are positioned in WA Department of Biodiversity, Conservation and Attractions operated National Parks and State Forests with two major geographical mountain bike trail hubs located in the Perth Hills (e.g. Kalamunda) and South West Region (e.g. Collie and Margaret River)

With over 40 kilometres of sanctioned single-track, the Kalamunda Trails Network is located within an easy 32-minute drive east of Perth's CBD and is the capital city's largest and most popular mountain biking destination with over 40 individual mountain bike trails of varying difficulties.

An audit of Mountain Bike Trails in Western Australia has been provided in Section 5: Situation Analysis, Competition: Mountain Biking/Recreation Product

The Western Australian Mountain Bike Strategy 2015-2020 provides an overview of trails, facilities and infrastructure in WA[33]

Sources for the graphic [pictured right] from the WestCycle Strategy include Common Ground Trails, Kalamunda Mountain Bike Collective, Munda Biddi Trail Foundation, National Geographic, Rail Trails, Single Track Minds and WAMBA.
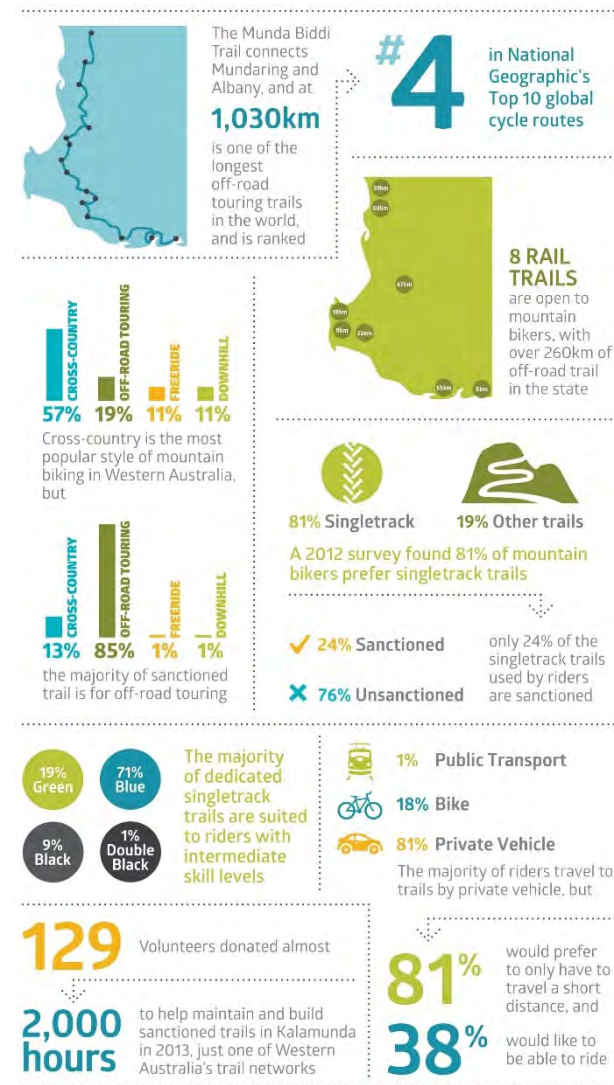
Figure 62: Western Australian Mountain Bike Strategy 2015-2020, WestCycle

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[32] Trailswa.com - Trails: Mountain Bike, June 2019

[33] Western Australian Mountain Bike Strategy 2015-2020, WestCycle

Mountain Bike Clubs in WA

WestCycle, the peak body incorporating the WA Mountain Bike Association (WAMBA) has a membership of 55 cycle-related clubs and organisations across the State.

These clubs are highly active, organised and regularly travel to participate in competitions and events across Western Australia, Australia and internationally. Over 50 competitive mountain-bike events are held in Western Australia every year.[34]

Advice by WestCycle pertaining to the potential development of a mountain bike club in Bindoon (often a natural progression by the community or regular visitors to a mountain bike park), is to recommend the development of, for example 'Bindoon Cycle Club' thus allowing all types of riders in the community and beyond to participate in a variety of cycling-based activities and events in Bindoon in the future i.e. future-proofing and broadening community and consumer appeal.

The following clubs and organisations demonstrate the potential for a mountain bike and cycle friendly town (Bindoon) to tap into this lucrative and passionate market sector of cycling enthusiasts and competition riders.

Cycle Clubs in Western Australia *WestCycle Members[35]	
225 Racing Cycle Club	Melville Fremantle Cycle Club
About Bike Hire	Mandurah BMX Club
Albany Cycle Club	Margaret River BMX Club
Australian Time Trials Association	Margaret River Off Road Cycling Association

Bunbury BMX Club	Midland Cycle Club
Burrup Mountain Bike Club	Northern Beaches Cycling Club
Busselton Cycle Club	Northern Districts WA Cycling Club
Byford BMX Club	Peel Districts Cycle Club
Cape Range Riders Exmouth	Peel Districts Mountain Bike Club
Cockburn BMX Club	Rockingham BMX Club
Collie BMX Club	South Perth Cycle Club
Collie Cycle Club	South West Cycle Club
Cowaramup BMX Club	South West Mountain Bike Club
Cycle Centre	Southern Districts BMX Club
Dunsborough Cycle Club	Southside BMX Club
East Pilbara BMX Club	Tom Price BMX Club
Eastern Goldfields BMX Club	Track Cycling WA
Eastern Goldfields Cycling Club	WA Historical Cycle Club
Esperance Cycle Club	Wanneroo BMX Club
G.E.A.R.S Cycle Club	Westside BMX Club
Geraldton Mountain Bike Club	Woorree Park BMX Club
Hedland BMX Club	X-Speed Australia Cycle Club
Hills BMX Club	Western Australian Tandem Cycling Advisory Council
Kalamunda Mountain Bike Collective	

Table 19: WestCycle member clubs, associations, industry providers

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[34] Western Australian Mountain Bike Strategy 2015-2020, WestCycle

[35] Published WestCycle Members, June 2019

Adaptive Mountain Biking[36]

Adaptive MTB (Mountain Biking) encompasses a broad range of events and riders who typically cannot ride a standard mountain bike and require adapted equipment and trails to suit their physical, intellectual, neurological and sensory abilities.

There are varying adaptive mountain bikes available around the world, each designed to meet a rider's specific need. Readily established adaptive equipment includes: handcycles, recumbent leg-cycles, and tandem bikes.

A comprehensive Adaptive Trail Rating (ATR) System has been developed to rate the accessibility of trails for adaptive riders.

The ATR System assesses the level of accessibility of mountain bike trails and their associated amenities for adaptive riders. The level of accessibility (rating) allows users to determine which trails are best suited for their ability and equipment.

The rating is broken down into two components, trails and amenities, each of which has 5 elements that are individually scored in line with the Adaptive MTB Guidelines.

Break the Boundary has developed a set of Adaptive Mountain Bike Guidelines and resources for use by associate members, clubs, charities, departments and associations around Australia. The Guidelines address many challenges with adaptive mountain biking and provides solutions such as the Adaptive Trail Rating (ATR) system.

Break the Boundary advocates for accessibility and inclusion of people with physical and neurological disabilities in Mountain Biking (recreational and sports) and acts as a central hub for people seeking information about Adaptive MTB around Australia.

Figure 63: Adaptive Trail Rating (ATR) System developed by Break the Boundary

Mountain Bike Trail Tips [37]

'Top Tips' for mountain bike trail users by Trails WA offer an insight to key recommendations and consumer education strategies for safe, responsible and enjoyable participation in mountain biking in Western Australia.

What to Take

Urban Trails or Short Trails Near Facilities: Walkers and Cyclists

Daypack with comfortable shoulder straps (with hip belt preferably) containing:

- Full large water bottle per person

- Sun hat or quality bike helmet (compulsory for cyclists in WA)

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[36] Break the Boundary, Adaptive Mountain Biking

[37] Trails WA 'Trail Tips' Guide – www.trailswa.com.au

- Sunglasses, sunscreen (30+) and insect repellent

- Clothes to suit the activity and potential weather conditions

- Binoculars and camera (optional)

- Trail mix to keep your energy levels up on longer walks e.g. nuts, dried fruit, seeds, chocolate and jellybeans.

- Disposable bag to remove/store all your rubbish

- Medical kit with heavy crepe bandage (for sprains and snake bite); antiseptic lotion; insect repellent (non-aerosol); personal medication (including pain killers); blister kit and fixomull (stretch tape)

- Spare inner tyre tubes or puncture repair kit, pump, tool kit

- Mountain bike shoes and clipless pedals are recommended

Trail Etiquette

International Mountain Bicycling Association (IMBA) Rules of the Trail:

These rules are recognised around the world as the standard code of conduct for mountain bikers. IMBA's mission is to promote mountain bicycling that is environmentally sound and socially responsible.

1. **Ride on Open Trails Only**

2. **Leave No Trace**

3. **Control Your Bicycle!**

4. **Always Yield Trail**

5. **Never Scare Animals**

6. **Plan Ahead**

Mountain Bike Australia – Mountain Bikers *Code of Conduct*[38]
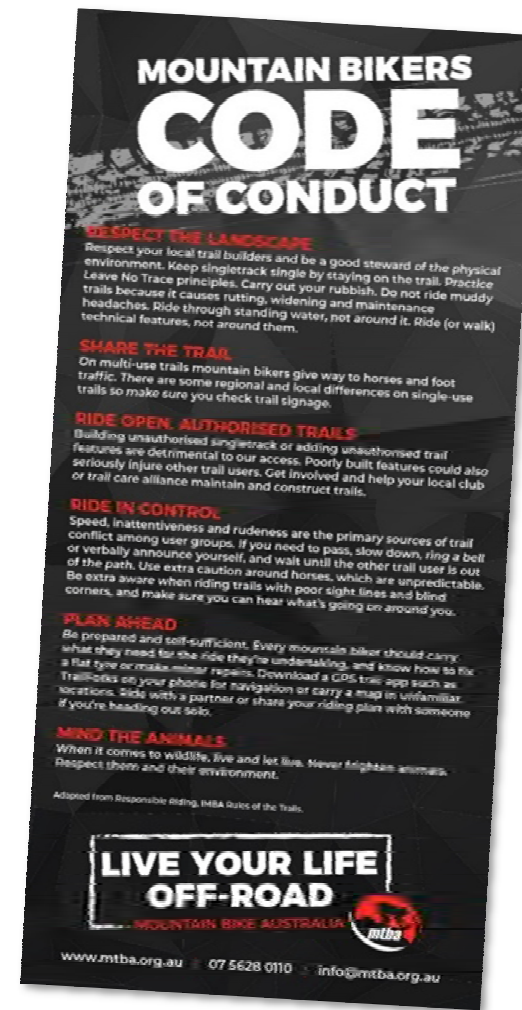
Figure 64: Mountain Bikers Code of Conduct – Mountain Bike Australia

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[38] Mountain Bike Australia – Mountain Bikers Code of Conduct

Mountain Biking Participant Group Observations

The Freestyler

PROFILE
- Active people who are motivated to take part in alternative freestyle sports for the lifestyle and culture that's associated with it
- Activities are perceived as 'cool' and play a role in defining who they are and their lifestyle
- Music and fashion are fundamental elements of this lifestyle choice

WHO
- Predominantly male participants 26-50 years
- In recent years there has been a growth amongst older aged men, women and girls
- More likely to include those who have turned their back on traditional school-based and institutional sport practices

WHY
- Social engagement and spending time with friends is important to this segment
- Participation is a way of life: self-expression and self-identity through association with the activity is as important as participation in the activity
- Motivated by the culture and ethos of 'freestyle' activities that allow for freedom of expressions and are more inclusive, anticompetitive and less rule-bound than most traditional sports
- Attracted to managed risk-taking
- Greater awareness via online content e.g. You Tube, Facebook and Instagram

WHERE
- More likely than other segments to participate in urban environments and in spaces outside of the traditional forms of provision such as schools, clubs and leisure centres
- Likely to travel for mountain biking adventures
- Likely to participate in leisure and sporting events (such as mountain biking, cycling, running, skiing and fun run events and competitions)

WHEN
- Likely to participate throughout the year
- As participation is part of their day to day lifestyle, they are likely to participate on a regular basis

Sustained participation motivators and key participation groups for mountain bikers may inform the development of key marketing strategies for a mountain biking attraction in Bindoon

Case Studies – Community Benefits

Case Studies are commonly used as a comparison to some of the outcomes a proposed mountain bike park, trail or network development may achieve. Often the issue with case studies is they lack relevance to the actual specifics of the proposed location.

In terms of the proposed Bindoon Mountain Bike and Adventure Park trails development, the following key issues are just some which make direct case study comparisons difficult to draw any real data from.

- Location
- Broad population base variances – local, regional and state
- Size of market segment
- Local/state/national economic environment
- Competitor environment
- Existing tourism profile/other attractions in the area
- Dual use locations i.e. summer MTB and winter snowfields
- Access and delivery of services

Of the above issues mentioned, an existing tourism profile and dual use locations, are responsible for the greatest variance in what can be achieved.

Mt Buller in Victoria for example has a well-regarded and well utilised mountain bike trail development and is often used as a case study, however Mt Buller has an existing high value tourism reputation, access to a large population base, has existing infrastructure, existing provision of all services and has efficiencies in the availability of resources and facilities to construct, operate and maintain the facility. So, by using everything that already existed

to operate in their peak snow season, adding in a summer mountain bike trails operation was relatively easy and had tremendous cost efficiencies.

Compare that to the proposed Bindoon development which has a limited tourism profile and added attractions, no dual use infrastructure, smaller population base, smaller WA market segment etc. Notwithstanding this, the vast majority of case studies which have been researched, all deliver a consistent message of broad community benefits when a mountain bike trail has been developed well, and all, or parts of each of the following outcomes (which are detailed below) may be applicable to a well designed and developed Bindoon Mountain Bike Trail.
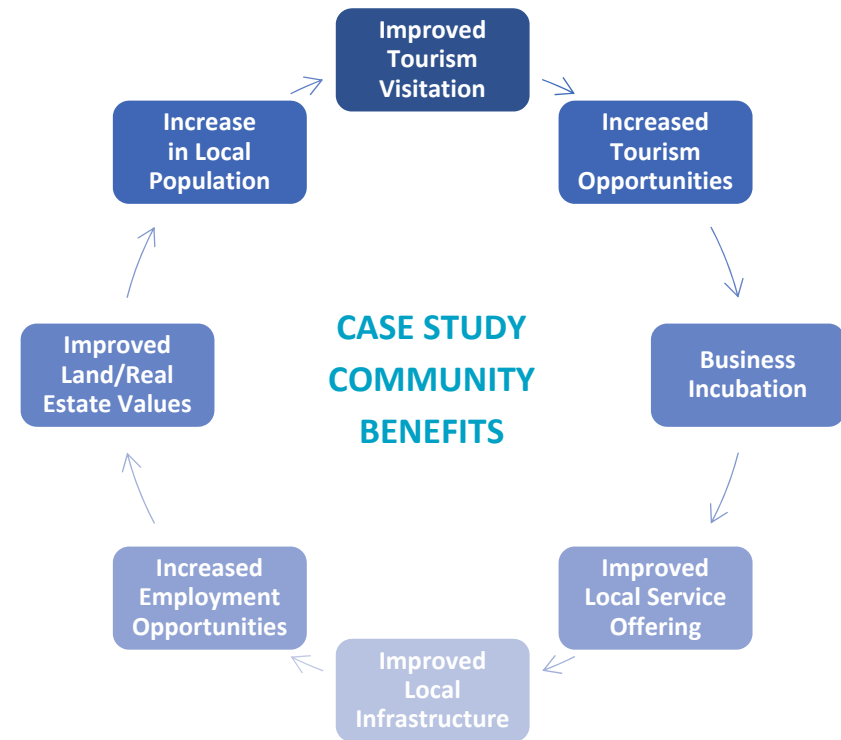
Figure 65: Case Study Community Benefits

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MTB Benefits - Health and Wellness[39]

Mountain Biking - Improve overall physical, mental, and emotional health.

As public health concerns including obesity, heart disease, and diabetes are on the rise, physical exercise, especially in the outdoors, is becoming more critical to our health as individuals and as a society.

Mountain biking is a fun and exciting way to enjoy the many health and wellness benefits of regular fitness and cardiovascular exercise including:

- **Improved Heart Health**

  Regular exercise is known to improve cardiovascular fitness. The British Medical Association studied 10,000 people and showed that riding a bicycle for at least 20 miles a week lessened the risk of coronary heart disease by almost 50%. Mountain biking uses large muscle groups that require a lot of oxygen. This makes the heart work steadily, increasing heart fitness by 3-7%.

- **Less Stress on the Joints**

  Mountain biking is a low impact sport, meaning it puts less stress on the joints than other aerobic activities such as running. Cycling is also considered a non-load bearing sport, which means that the act of sitting takes the pressure off the joints and reduces the risk of injuring them.

- **Decreased Risk of Diseases**

  Regular moderate exercise is known to strengthen the immune

system and keep people healthy. Researchers at the University of North Carolina found that people who cycle for 30 minutes, 5 days a week take half as many sick days off work compared to their sedentary counterparts!

- **Reduced Stress and Improved Mood**

  The vigorous demands of mountain biking stimulate the body to release natural endorphins, which are the body's way of feeling good and getting more energy. Exercise also boosts serotonin, an important neurotransmitter in the brain which helps to prevent depression and anxiety.

  The focus and attention needed to ride a challenging single-track can become a form of moving meditation; ultimately helping to relax and weather life's stressors by acting as a distraction from negative thoughts that may contribute to anxiety and depression.

  Gaining new skills and improving mountain biking abilities also helps to build confidence and self-esteem.

- **Increased Brain Power**

  Researchers at Illinois University found that a 5% improvement in cardio-respiratory fitness from cycling led to an improvement of up to 15% on mental tests. This is in part due to building brain cells in the hippocampus – the region of the brain responsible for memory. "It boosts blood flow and oxygen to the brain, which fires and regenerates receptors, explaining how exercise helps ward off

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[39] Travel Bug Health, USA, Benefits of Mountain Biking

Alzheimer's," Professor Arthur Kramer said.

Creative professionals and executives often use their sharpened brain function during exercise time to come up with ideas and solve problems.

- **Improved balance and coordination**

Unlike plodding on a treadmill or stair stepper, mountain biking is a dynamic activity that requires the rider to constantly adjust to varying terrain, pitch, and elevation. Staying steady and secure on a mountain bike not only keeps them from crashing but strengthens neural pathways and reinforces muscle memory.

Balance and coordination requires the combined resources of the brain, senses, muscles and nervous system. Keeping these systems active as we get older staves off disability from aging and reduces the risk of injury from falls.

- **Whole Body Workout**

It's no doubt we recognise the defined calf muscles of an avid cyclist, but many may not realise that mountain biking uses the muscles of the whole body. The balance required to stay upright strengthens abdominal and core muscles. Climbing and manoeuvring turns also strengthens the upper body.

- **Sleep Better**

Riders may immediately feel tired and worn out after a ride, but it will ultimately lead to improved regenerative sleep when they need it at night. The exercise of riding decreases cortisol, a hormone that keeps us awake. Being an outdoor activity, mountain biking exposes people to daylight which helps to maintain the body's natural circadian sleep/wake cycle and raises the body's production of vitamin D.

- **Social Benefits**

The newer field of happiness psychology has shown that healthy relationships and social interactions are key to being happy and finding meaning in life. Mountain biking is often a social activity shared by clubs and groups who get out to ride together. It provides a perfect opportunity to build personal bonds and make new friends with people who enjoy the same activities.

- **Enjoy Nature**

Mountain biking, more than any other activity, allows riders to quickly get off the beaten path and enjoy the solitude and magnificence of nature. Japanese researchers have shown that being out in nature (what they refer to as "forest bathing") improves relaxation and reduces stress. A busy urban environment has exactly the opposite effects of stimulating the fear and anxiety centres in the brain. Spending more time on a mountain bike may also develop personal habits to be more green and friendly to the environment.

Section 12:

Outdoor Recreation Industry Snapshot

12. Outdoor Recreation Industry Snapshot

Outdoor recreation is characterised by physical activities undertaken in open, outdoor spaces for the purpose of enjoyment, rather than competition, which would be classified as sport. The outdoor recreation sector is exceptionally diverse, with major intersections with the education, tourism, hospitality, community and sporting sectors.

Organisations and enterprises related to outdoor recreation activities include:

- Outdoor activity providers

- Outdoor activity tour providers

- Recreational camps or centres

- Adventure, eco or nature-based tourism operators

- Outdoor artificial amusement venues (e.g. tree top adventure parks)

- Outdoor education providers and programs

- Schools with outdoor education teachers

- Clubs, associations and peak bodies for outdoor recreation activities

- Youth and community groups (e.g. Girl Guides, Scouts)

- Recreation or adventure-based counselling and therapy providers

Outdoor Recreation Industry and Workforce Summary – Australia[40]

Outdoor recreation has been found to be a significant direct and indirect contributor to the economies of other countries but no study has been done at the national level in Australia. The forecast for the industry however is 'growth'. An overview of key facts for the outdoor recreation industry and workforce (national), as identified by Service Skills Australia in 2015 are as follows:

- Schools outsourcing outdoor education are expected to continue to bring substantial growth to the sector.

- Outdoor recreation workers need more skills to give them the best chance of full-time employment in the sector.

- Volunteers are an important part of the sector but their numbers are falling.

- Training needs to be flexible and reasonably priced to support workers already in the sector and volunteers.

- The inconsistent application of Activity Standards makes things hard for organisations working across States.

- Qualifications might need to be moved to higher Australian Qualification Framework levels because of the level of risk in the activities involved.

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[40] Service Skills Australia, Environmental Scan – Sport, Fitness & Recreation 2015

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Australian Industry Groups, Organisations and Associations

Examples of industry groups, organisations and associations for the outdoor recreation; cycling; mountain biking; and tourism sectors are outlined below.

- Australian Amusement, Leisure and Recreation Association Inc. (AALARA) www.aalara.com.au

- Australian Camps Association www.auscamps.asn.au

- Australian Tourism Export Council www.atec.net.au

- Destination Perth www.experienceperth.com

- Eco Tourism Australia www.ecotourism.org.au

- FACET (Forum Advocating Cultural and Eco-Tourism) www.facet.asn.au

- International Association of Amusement Parks and Attractions (IAAPA) www.iaapa.org

- International Camping Fellowship / Camp Directors www.campingfellowship.org

- Outdoor Council of Australia www.auscamps.asn.au

- Outdoor Education Australia www.outdooreducationaustralia.org.au

- Outdoors WA www.outdoorswa.org.au

- Perth Convention Bureau www.pcb.com.au

- Tourism Council of WA (TCWA) www.tourismcouncilwa.com.au

- Tour Guides WA www.tgwa.asn.au

- Visitor Centres WA www.visitorcentreswa.com.au

- WA Indigenous Tourism Operators Council (WAITOC) www.waitoc.com

Outdoor Recreation Industry – Western Australia[41]

Outdoor Recreation Industry Trends – Western Australia

The increased attraction of eco-tourism and Australia's continued marketing as a nature tourism destination is resulting in an increased demand for outdoor recreation activities. Adventure tourism research has found that experience seekers make up 49% of visitors to Australia, and that 'nature' is the number one experience that motivates visitors to come to Australia. Together, these indicate that the provision of quality nature-based activities is a key drawcard for Australia's significant tourism industry.

A flow-on effect of this is that there is a steady shift in regulation of the sector, to both manage the inherent risk involved in the associated activities, as well as to ensure there are adequate initiatives to improve service standards.

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[41] FutureNow Creative and Leisure Industries Training Council Workforce Development Plan - Sport, Recreation and Racing Industries, Western Australia 2014

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A shift away from structured sporting environments towards extreme sport and recreation activities, or adventure-based activities is on the increase.

Adventure guides are one of the nation's fastest growing occupations

Regional Impact

Outdoor recreation operators and businesses in Western Australia are predominately located, or run their outdoor recreation activities in the North West (Kimberley, Exmouth, Karijini) and South West (Margaret River, Dunsborough) regions, with many of the water-based activities located along the Coral Coast region focused on Ningaloo reef/Exmouth.

Due to the seasonality of the Western Australian weather, and the peaks and lulls of the tourist season, many businesses and employees will focus their activities on the Perth greater metropolitan region during summer months, and the northwest of the state during the winter months.

Regulatory Requirements and Accreditation

Australian Adventure Activity Standards	Identify common safe practice and are the minimum standards for the conduct of group outdoor adventure activities in Australia.
National Outdoor Leaders	For outdoor recreation instructors, leaders and guides, NOLRS is a national scheme
Recreation Scheme (NOLRS)	that registers outdoor leaders who have the skills, experience and qualifications deemed as being the equivalent to industry standard.
The Australian Tourism Accreditation Program (ATAP) *Changing to 'Quality Tourism Accredited Business' Program in FY 2019/2020*	Ensures accredited businesses are operating at or above benchmark standards (within a tourism industry context). Typically, outdoor recreation businesses seeking this type of accreditation operate an 'Adventure Tourism' or 'Eco Tourism' style of service.

- *includes EcoPlus Accreditation Program*
- *includes China-Ready Accreditation Program*
- *includes Visitor Centre Accreditation Program*
- *include Marine Tourism Accreditation Program*

National Accommodation, Recreation & Tourism Accreditation (NARTA)	Designed to provide a process for checking and providing recognition of compliance with relevant educational, legal and operational requirements.

Gender/Age Participation

According to the Australian Government Job Outlook figures, females make up only 33.4% of outdoor adventure guides. The main age group is 35-44

years (26.1%), and the median age is 34 years (compared to 40 years of all occupations).

Labour and Skill Demand

A report by Service Skills Australia reported a growing demand for more volunteer staff with first aid and specialist activity skills.

Also cited was the growing enrolment in school of students studying courses in outdoor education. Outdoor education has been recognised in the first national curriculum, which will potentially increase the number of trained staff needed to deliver outdoor education nationally.

Large increases in high-school students studying a Certificate II in Outdoor Recreation is also having ramifications for the industry, with the peak industry body Outdoors WA recommending that these teachers have completed a Certificate IV in Outdoor Recreation, or a minimum skill set in the activity they are teaching, to ensure they are adequately qualified and equipped to deliver the lower level outdoor recreation qualifications to students.

Opportunity for Bindoon Mountain Bike and Adventure Park to provide training camps to teachers to acquire Outdoor Recreation skills, qualifications and currency (additional source of income, exposure to new schools and sport and recreation teachers).

Major Challenges and Barriers for Industry

There is a lack of training providers delivering outdoor recreation vocational education and training (VET) qualifications in Western Australia. Large numbers of students are undertaking outdoor education and outdoor recreation courses in senior high schools however there remains a lack of a training pathways for them to continue outdoor recreation studies at a Certificate III or IV level if desired. Training providers delivering Certificate III and IV level qualifications are critical to ensuring a continued supply of qualified staff to the industry to address labour shortages.

The seasonality, casualisation of the workforce, and freelance work is a challenge for ensuring training delivery and makes the utilisation of trainees for the sector more difficult.

Industry also reports that the casualised nature of the industry also deters some people from entering the sector or encourages some to exit the industry when they reach a certain life stage.

The small number of higher-level management roles required in the industry is recognised as a factor that limits career progression.

New and Emerging Skills

Greater synergies with the tourism industry and growth in adventure tourism is resulting in new roles that are a combination of both outdoor recreation and adventure tourism. The sector's breadth across areas such as tourism, education and community services provide a variety of work settings and an ability to broaden skills, which are skills that are highly transferrable to many other industries.

There is a large demographic of teachers delivering Certificate II in Outdoor Recreation through VET in schools, who require skills gap training or upskilling to ensure they have industry competency and vocational currency to satisfy

both the requirements of the outdoors industry, but also to ensure compliance with the standards for vocational trainers and assessors.

Outdoor Recreation Participation Motivators[42]

The 'Getting Active Outdoors' report, commissioned by Sport England and produced in partnership with the UK Outdoor Industries Association examined the demand and supply of outdoor provision and took an in-depth look at the profile of the outdoor consumer, taking account of demography, motivation, participation and provision in outdoor sport and recreation in England.

Whilst this report is derived from the United Kingdom, correlations between English and Australian outdoor recreation activities can be drawn, particularly with regards to participation motivators.

Although there are a number of influencing factors that differentiate participants into segment groups there are several key motivating factors that are commonly cited by outdoor participants, these have been identified in the following table.

Sustained Participation Motivators

1. To spend time with family

- 43% of participants first participated in their main outdoor activity with parents/guardian/family - biggest influences in attracting new participants to outdoor activity.

- Spending time with parents and family are the main reasons for participating among youth outdoor participants. As youths get older, the influence of parents, brothers, sisters and relatives is slowly overshadowed by the influence of friends and their own interests.

- 70-80% of all participants feel participation strengthens family relationships.

- Parents of children who are active outdoors are twice as likely to become active themselves. Similarly, the children of parents who are active outdoors are twice as likely to become active themselves.

- Family participation is more likely amongst 25 to 44 year olds.

- Those with a long-term illness or disability and those aged 55 are least likely to participate as a family.

2. To have fun with friends

- 90% of all participants take part to have fun and enjoy themselves.

- Simply having fun with friends is the top motivator for those under 18 years old.

- 31% of participants first took part in their main activity with friends who are already active in the activity or wanted to try the activity - second biggest influence in attracting new participants to outdoor activity after family.

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[42] 'Getting Active Outdoors', Outdoor Industries Association of England, Sport England, 2015

Sustained Participation Motivators

3. Alternative to traditional sport

- A growing proportion of young people are choosing 'lifestyle sports' as an alternative to more traditional school based sports either as a means of identifying themselves through recognisable styles, expressions and attitudes that develop in and around the activity, or because they have been alienated from more traditional/institutionalised sports.

4. To enjoy the scenery / be close to nature

- Research shows that developing a 'connection' with nature, such as enjoyment of scenery and wildlife at favourite places, becomes the more important factor in maintaining levels of physical activity.

- Visits taken by 55 years plus are more likely than those taken by the rest of the population to involve walking without a dog and to be motivated by enjoyment of scenery and wildlife.

5. For fresh air and to enjoy the weather

- 40% of the population would prefer to take their exercise outdoors, primarily for the fresh air.

6. To relax and de-stress / get away from modern life

- 92% of people participate outdoors to de-stress and relax. Being active outdoors provides a return to nature and the natural environment - this works as the perfect antidote to the stresses of modern day living.

- For 18 to 24 years, relaxation and exercise become the top motivations. The outdoors provides a breathing space, away from family or peer pressures; a place where they can do what they want; where they can relax and feel free; a comfortable place, without adults, where they won't be told to go away; a place to have a good time with friends.

- Extensive research by Natural England shows strong correlations between

Sustained Participation Motivators

outdoor exercise and preventing obesity, diabetes and depression.

Figure 66: Sustained participation motivators

Section 13:

Sport & Recreation

Participation in WA

13. Sport & Recreation Participation in WA

Why is Sport Important to Australians?[43]

Australians love sport. It is a defining characteristic of our national culture — one that is recognised across the world. In sport, Australia's diverse population discovers a shared identity. We come together to play sport at local ovals, fields, courts, parks and beaches. We flock to great stadiums around the country to watch the contest. We celebrate and exude national pride when our athletes represent us on the world stage.

The numbers are compelling. Approximately 6.5 million Australians participate in organised sport and 7.6 million attend live sporting events each year.

Ninety-two per cent of adult Australians have an interest in at least one sport, and six on average. Importantly, 2.3 million people volunteer time for sport each year — the largest volunteer group in the country.

Whether it is for the friendships, the fitness, the thrill of the competition or the pure love of the game, sport is important to Australians.

And sport is good for Australians. It makes us a healthier nation both physically and mentally. Sport reduces the incidence of chronic disease, including obesity-related illnesses, diabetes and cardiovascular disease. Physical inactivity is a well-known and growing problem in Australia, with over 13,000 deaths attributed to it annually and more than 45,000 new cases identified each year. Recent research estimates a financial benefit of $434 million to the economy if physical inactivity could be reduced by 15 per cent.

Sport also helps to build our confidence, self-esteem, and reduces our crime rates. It helps us to develop stronger communities, bridges cultural boundaries and improves our international relations. Sport improves our academic performance, our social lives and creates an environment where all are equal. Sport is an important economic driver in Australia, with a workforce of over 2.4 million people and generating more than $12.8 billion in annual income.

Australian Sports Participation?[44]

Evolving preferences: Australia's sporting context is evolving and the Australian Sports Commission aims to be at the forefront of helping sports to succeed in a changing environment.

- Why aren't more Australians playing sport?
- How do we compete with all the gadgets?
- What are our kids doing?

77% of children spend their spare time watching television and only half of the child population in Australia are involved in sport.

Research into the sports market by the Australian Sports Commission tells us that Australians are increasingly time-poor, have limited budgets and are being inundated by new forms of entertainment. With these changes new preferences are emerging; Australians want greater flexibility, more tailored products and sport that works around them.

The Australian Sports Commission have partnered with the CSIRO to identify

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[43] Play. Sport. Australia. The Australian Sports Commission's Participation Game Plan

[44] Play. Sport. Australia. The Australian Sports Commission's Participation Game Plan

trends in sport that are likely to affect the sector during the next 30 years. The study confirmed that people are increasingly:

- Favouring more flexible, non-organised physical activity, such as running with headphones on;

- Pursuing new lifestyle and adventure sports; and

- Developing new tastes as our population becomes more culturally diverse.

Similarly, the study revealed that commercial forces are placing sporting organisations under pressure to adopt more business-oriented structures. The challenge for sport now is how to respond to these changes without eroding what makes sport unique and appealing.

Only 1/3 of children and one in ten of young people undertook the recommended 60 minutes of physical activity per day

Almost 70% of Australian Adults (approximately 12 million adults), are either sedentary or have low levels of physical activity

This does not bode well for children in Australia given the strong correlation between the activity levels of parents and their children.

Sport & Recreation Participation Data - WA

Australian Sports Commission AusPlay Survey Results (Western Australia) July 2017 - June 2018[45]

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[45] AusPlay Survey Results (WA) July 2017-June 2018, released 31 October 2018

Type of Organisations/Venues Used - Selected Organisations (Adults)					
Adult Population			**Type of Organisation/Venue**		
Gender	Age Group	Total	Sports Club or Association	Recreation Club or Association	Gym / Fitness Club / Sports / Leisure Centre
Estimate (000s)					
Males	15-17	39.4	22.3	1.8	10.6
	18-24	100.0	53.6	6.0	53.9
	25-34	173.6	62.9	8.5	116.9
	35-44	114.5	54.8	4.0	56.3
	45-54	112.2	50.5	9.3	53.3
	55-64	59.8	31.2	2.3	21.1
	65+	87.2	37.7	11.3	36.3
	Total	**686.8**	**312.8**	**43.1**	**348.4**
Females	15-17	34.3	20.7	0.0	8.7
	18-24	92.7	23.8	11.0	61.9
	25-34	154.1	23.9	8.2	112.1
	35-44	107.6	32.0	3.6	72.2
	45-54	104.5	29.1	5.2	56.5
	55-64	84.6	11.4	4.2	43.2
	65+	100.4	27.2	13.2	42.0
	Total	**678.1**	**168.0**	**45.4**	**396.7**
Total	15-17	73.7	43.0	1.8	19.4
	18-24	192.7	77.3	17.0	115.8
	25-34	327.7	86.7	16.7	229.0
	35-44	222.1	86.7	7.6	128.5

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Type of Organisations/Venues Used - Selected Organisations (Adults)					
Adult Population			**Type of Organisation/Venue**		
Gender	Age Group	Total	Sports Club or Association	Recreation Club or Association	Gym / Fitness Club / Sports / Leisure Centre
	45-54	216.7	79.6	14.5	109.8
	55-64	144.4	42.6	6.4	64.3
	65+	187.7	64.9	24.5	78.3
	Total	**1,364.9**	**480.9**	**88.5**	**745.1**
Participation Rate (%)					
Gender	Age Group	Total	Sports Club or Association	Recreation Club or Association	Gym / Fitness Club / Sports / Leisure Centre
Males	15-17	84.4%	47.7%	3.9%	22.7%
	18-24	68.0%	36.4%	4.1%	36.6%
	25-34	71.7%	25.9%	3.5%	48.2%
	35-44	54.2%	25.9%	1.9%	26.7%
	45-54	58.8%	26.5%	4.9%	27.9%
	55-64	38.0%	19.8%	1.4%	13.4%
	65+	48.3%	20.8%	6.2%	20.1%
	Total	58.4%	26.6%	3.7%	29.6%
Females	15-17	90.5%	54.7%	0.0%	23.1%
	18-24	65.9%	16.9%	7.8%	44.0%
	25-34	66.7%	10.3%	3.6%	48.6%
	35-44	54.2%	16.1%	1.8%	36.4%
	45-54	56.7%	15.8%	2.8%	30.7%
	55-64	53.7%	7.3%	2.7%	27.4%
	65+	49.8%	13.5%	6.6%	20.8%
	Total	58.9%	14.6%	3.9%	34.5%
Total	15-17	87.1%	50.9%	2.2%	22.9%

Type of Organisations/Venues Used - Selected Organisations (Adults)					
Adult Population			**Type of Organisation/Venue**		
Gender	Age Group	Total	Sports Club or Association	Recreation Club or Association	Gym / Fitness Club / Sports / Leisure Centre
	18-24	67.0%	26.9%	5.9%	40.2%
	25-34	69.3%	18.3%	3.5%	48.4%
	35-44	54.2%	21.2%	1.8%	31.4%
	45-54	57.8%	21.2%	3.9%	29.3%
	55-64	45.9%	13.5%	2.0%	20.4%
	65+	49.1%	17.0%	6.4%	20.5%
	Total	58.6%	20.7%	3.8%	32.0%

Note: Some estimates have relative margin of error between 50% and 100% and should be used with caution; some estimates have relative margin of error greater than 100% and are considered too unreliable to use.

Frequency of Participation (Adults)											
Adult Population											
Gender	Age Group	1+ p/year	1+ p/mth	1+ p/fn	1+ p/wk	2+ p/wk	3+ p/w	4+ p/wk	5+ p/wk	6+ p/wk	7+ p/wk
Estimate (000s)											
MALES	15-17	43.9	42.7	38.7	36.8	34.7	31.3	26.4	23.5	12.6	9.6
	18-24	136.2	130.8	129.4	123.5	107.9	92.3	78.8	59.9	37.6	35.3
	25-34	227.0	223.0	217.8	209.8	185.9	152.9	117.3	91.4	60.5	42.7
	35-44	188.5	185.4	177.6	167.3	141.6	124.8	89.7	69.4	46.9	30.1
	45-54	175.3	171.6	166.1	154.7	136.5	111.7	89.5	73.0	53.8	43.8
	55-64	135.3	134.1	129.4	123.9	111.3	96.1	86.0	68.8	56.9	52.0
	65+	163.4	161.5	157.4	151.5	142.3	124.5	100.1	79.6	60.5	49.3
	Total	1,069.4	1,049.2	1,016.4	967.6	860.2	733.6	587.8	465.8	328.8	262.8
F	15-17	36.0	36.0	36.0	36.0	26.1	22.1	19.8	19.8	17.8	4.1

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Adult Population

Gender	Age Group	1+ p/year	1+ p/mth	1+ p/fn	1+ p/wk	2+ p/wk	3+ p/w	4+ p/wk	5+ p/wk	6+ p/wk	7+ p/wk
FEMALES	18-24	132.3	127.1	125.1	116.4	105.4	87.6	77.1	71.6	52.2	41.5
	25-34	210.0	198.6	198.6	189.6	180.6	155.3	128.5	89.4	59.5	43.2
	35-44	181.6	178.9	173.4	167.0	154.5	131.9	98.2	82.2	67.3	54.6
	45-54	163.5	158.1	157.0	153.0	138.7	125.5	98.7	81.9	67.0	51.6
	55-64	139.5	138.4	137.4	135.9	128.6	110.8	97.5	81.1	66.6	51.3
	65+	168.5	166.2	165.3	161.6	153.0	137.9	114.7	97.0	81.5	68.3
	Total	1,031.3	1,003.3	992.9	959.5	886.8	771.1	634.5	523.1	411.9	314.7
TOTAL	15-17	79.8	78.7	74.7	72.8	60.8	53.4	46.2	43.4	30.3	13.7
	18-24	268.5	257.9	254.6	239.8	213.3	179.9	155.9	131.5	89.7	76.8
	25-34	437.0	421.6	416.5	399.4	366.5	308.3	245.8	180.8	120.0	85.9
	35-44	370.0	364.3	351.0	334.4	296.0	256.7	187.9	151.7	114.1	84.7
	45-54	338.8	329.6	323.1	307.7	275.2	237.2	188.2	154.9	120.8	95.4
	55-64	274.8	272.5	266.8	259.8	239.9	206.8	183.4	149.9	123.5	103.3
	65+	331.8	327.8	322.7	313.1	295.3	262.4	214.8	176.7	142.0	117.7
	Total	2,100.7	2,052.5	2,009.3	1,927.1	1,747.0	1,504.7	1,222.3	988.8	740.6	577.4

Participation Rate (%)

Gender	Age Group	1+ p/year	1+ p/mth	1+ p/fn	1+ p/wk	2+ p/wk	3+ p/w	4+ p/wk	5+ p/wk	6+ p/wk	7+ p/wk
MALES	15-17	93.9%	91.5%	82.8%	78.9%	74.3%	67.0%	56.6%	50.4%	27.0%	20.5%
	18-24	92.6%	88.9%	88.0%	83.9%	73.3%	62.7%	53.6%	40.7%	25.5%	24.0%
	25-34	93.7%	92.0%	89.9%	86.6%	76.7%	63.1%	48.4%	37.7%	25.0%	17.6%
	35-44	89.3%	87.8%	84.1%	79.3%	67.1%	59.1%	42.5%	32.9%	22.2%	14.2%
	45-54	91.8%	89.9%	87.0%	81.1%	71.5%	58.5%	46.9%	38.2%	28.2%	23.0%
	55-64	86.1%	85.3%	82.3%	78.8%	70.8%	61.1%	54.7%	43.8%	36.2%	33.0%
	65+	90.4%	89.4%	87.1%	83.8%	78.8%	68.9%	55.4%	44.1%	33.5%	27.3%
	Total	90.9%	89.2%	86.4%	82.3%	73.1%	62.4%	50.0%	39.6%	28.0%	22.3%
FEMALES	15-17	95.0%	95.0%	95.0%	95.0%	68.9%	58.4%	52.4%	52.4%	46.9%	10.9%
	18-24	94.1%	90.3%	89.0%	82.7%	74.9%	62.3%	54.8%	50.9%	37.1%	29.5%

Adult Population

Gender	Age Group	1+ p/year	1+ p/mth	1+ p/fn	1+ p/wk	2+ p/wk	3+ p/w	4+ p/wk	5+ p/wk	6+ p/wk	7+ p/wk
MALES	25-34	91.0%	86.0%	86.0%	82.1%	78.2%	67.3%	55.7%	38.7%	25.8%	18.7%
	35-44	91.4%	90.1%	87.3%	84.1%	77.8%	66.4%	49.4%	41.4%	33.9%	27.5%
	45-54	88.8%	85.9%	85.3%	83.1%	75.3%	68.2%	53.6%	44.5%	36.4%	28.0%
	55-64	88.5%	87.8%	87.2%	86.3%	81.6%	70.3%	61.9%	51.5%	42.3%	32.6%
	65+	83.5%	82.4%	82.0%	80.1%	75.9%	68.4%	56.9%	48.1%	40.4%	33.9%
	Total	89.6%	87.1%	86.2%	83.3%	77.0%	67.0%	55.1%	45.4%	35.8%	27.3%
TOTAL	15-17	94.4%	93.1%	88.3%	86.1%	71.9%	63.2%	54.7%	51.3%	35.9%	16.2%
	18-24	93.3%	89.6%	88.5%	83.3%	74.1%	62.5%	54.2%	45.7%	31.2%	26.7%
	25-34	92.4%	89.1%	88.0%	84.4%	77.5%	65.2%	52.0%	38.2%	25.4%	18.2%
	35-44	90.3%	88.9%	85.6%	81.6%	72.2%	62.6%	45.9%	37.0%	27.9%	20.7%
	45-54	90.3%	87.9%	86.2%	82.1%	73.4%	63.3%	50.2%	41.3%	32.2%	25.4%
	55-64	87.3%	86.6%	84.8%	82.5%	76.2%	65.7%	58.3%	47.6%	39.2%	32.8%
	65+	86.8%	85.7%	84.4%	81.9%	77.2%	68.6%	56.2%	46.2%	37.1%	30.8%
	Total	90.3%	88.2%	86.3%	82.8%	75.1%	64.7%	52.5%	42.5%	31.8%	24.8%

Note: Some estimates have relative margin of error between 50% and 100% and should be used with caution; some estimates have relative margin of error greater than 100% and are considered too unreliable to use

Frequency of Participation (Children)

Child Population

Gender	1+ per year	1+ per month	1+ per fortnight	1+ per week	2+ per week	3+ per week
Estimate (000s)						
Males	43.9	42.7	38.7	36.8	34.7	31.3
Females	36.0	36.0	36.0	36.0	26.1	22.1

Frequency of Participation (Children)

Child Population						
Gender	1+ per year	1+ per month	1+ per fortnight	1+ per week	2+ per week	3+ per week
Total	1,031.3	1,003.3	992.9	959.5	886.8	771.1
Males	68.4%	64.8%	59.9%	52.1%	35.3%	22.1%
Females	69.7%	63.9%	58.7%	51.0%	27.6%	15.7%
Total	69.0%	64.3%	59.3%	51.6%	31.5%	18.9%

Note: Some estimates have relative margin of error between 50% and 100% and should be used with caution; some estimates have relative margin of error greater than 100% and are considered too unreliable to use

Participation by Activity – Top 15 Activities (Adult Population)

Activity	Total	Males	Females
Estimate (000s)			
	995.7	384.5	611.2
	805.2	375.0	430.2
	358.6	204.0	154.6
	342.5	159.6	182.9
	262.1	150.9	111.2
	112.8	86.1	26.8
	102.5	14.2	88.3
	95.4	39.9	55.5
	91.8	76.1	15.6
	88.9	67.7	21.2
	87.9	76.1	11.8
	78.3	38.5	39.8
	74.1	13.2	60.8
	70.9	61.3	9.6

Participation by Activity – Top 15 Activities (Adult Population)

Activity	Total	Males	Females
Estimate (000s)			
	69.3	3.8	65.5
Participation Rate %			
Walking (Recreational)	42.8%	32.7%	53.1%
Fitness/Gym	34.6%	31.9%	37.4%
Athletics, track and field (includes jogging and running)	15.4%	17.3%	13.4%
Swimming	14.7%	13.6%	15.9%
Cycling	11.3%	12.8%	9.7%
Football/soccer	4.8%	7.3%	2.3%
Yoga	4.4%	1.2%	7.7%
Bush walking	4.1%	3.4%	4.8%
Golf	3.9%	6.5%	1.4%
Basketball	3.8%	5.8%	1.8%
Australian football	3.8%	6.5%	1.0%
Tennis	3.4%	3.3%	3.5%
Pilates	3.2%	1.1%	5.3%
Cricket	3.0%	5.2%	0.8%
Netball	3.0%	0.3%	5.7%

Note: Top 15 activities based on at least once per year participation. Some estimates have relative margin of error between 50% and 100% and should be used with caution; some estimates have relative margin of error greater than 100% and are considered too unreliable to us

Organised Participation by Activity – Top 10 Activities (Child Population)

Activity	Total	Males	Females
Estimate (000s)			
Swimming	143.8	69.1	74.7
Football/soccer	68.9	53.3	15.6
Australian football	57.6	46.0	11.6
Gymnastics	47.6	12.7	34.9
Dancing (recreational)	36.7	0.6	36.2
Netball	36.1	0.7	35.3
Basketball	31.0	12.8	18.2
Fitness/Gym	28.8	9.1	19.7
Athletics, track and field (includes jogging and running)	26.7	13.5	13.2
Hockey	26.4	12.1	14.3
Participation Rate %			
Swimming	25.8%	24.7%	26.9%
Football/soccer	12.4%	19.0%	5.6%
Australian football	10.3%	16.4%	4.2%
Gymnastics	8.5%	4.5%	12.6%
Dancing (recreational)	6.6%	0.2%	13.0%
Netball	6.5%	0.3%	12.7%
Basketball	5.6%	4.6%	6.6%
Fitness/Gym	5.2%	3.3%	7.1%

Organised Participation by Activity – Top 10 Activities (Child Population)

Activity	Total	Males	Females
Estimate (000s)			
Athletics, track and field (includes jogging and running)	4.8%	4.8%	4.8%
Hockey	4.7%	4.3%	5.1%

Note: For children 0-14 years, data was collected via the child's parent/guardian for organised participation outside of school hours. Top 10 activities based on at least once per year participation. Some estimates have relative margin of error between 50% and 100% and should be used with caution; some estimates have relative margin of error greater than 100% and are considered too unreliable to use

Table 20: Sport & Recreation Data WA Tables, June 2017-2018

Parents' Role in Children's Sport Participation[46]

Parents play a significant role in deciding what sport their child plays (if any) and how they play. What influences parents' decisions and how do we, the sport sector, aid their decision making?

According to ABD Census data, virtually all parents of 5-17 year old children actively encourage them to participate in activities of some sort however sport is one of a myriad of activities parents can choose from.

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[46] Australian Sports Commission - Parents Market Segmentation, 2015

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Barriers in Choosing Children's Activities

- Parents' negative attitude to club sport is a key barrier to their children's involvement.

- Overall, cost and time forms the basis of parents' decision making

- Safety is also a barrier. Parents may not allow their children to play some sports, such as the various high physical contact sports, due to the perceived potential risk of injury.

Parents will find the time and money to accommodate their children's wishes where they can. But other factors also impact parents' decision making.

Factors Impacting Parent's Decision Making

- Need for activity - Are there social, physical or emotional benefits of needs to be fulfilled?

- Level of parental involvement - The busy parent situation means that the level of parental involvement is critical.

- Level of commitment of the child - The level of commitment of the child to the activity is critical for the longer term and cost implications.

- Level of familiarity with the activity - Do parents understand what may be involved? Better ability to assess the impact on their lives.

Overall, the choice to participate in physical activity is driven by both parents and children.

Parents will encourage an activity for reasons to do with:

- Safety

- Physical or psychological diffictulties

- Status or identity

- Future opportunities

Children will ask to do an activity mostly due to a direct stimulus from:

- Peers

- Parents' interest

- Role models

- Opportunity for trial

Ensuring children's enjoyment as well as building children's confidence and a sense of achievement are key factors for parents feeling satisfied with their children's involvement in an activity. This has critical impact on both acquisition and retention.

Megatrends Shaping the Aust Sports Sector[47]

The future of Australian Megatrends shaping the sports sector over coming decades summary was released by the CSIRO in partnership with the Australian Sports Commission.

A megatrend is defined as a major shift in environmental, social and economic

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[47] The Future of Australian Sport Summary - Megatrends Shaping the Sports Sector Over

Coming Decades – CSIRO, Australian Sports Commission

conditions that will substantially alter the way people live. Megatrends occur at the intersection of multiple trends. A trend is defined as an important pattern of social, economic or environmental activity that will play out in the future.

Six megatrends have been identified within The Future of Australian Sport report, which will impact on the makeup of sport in Australia over the next 30 years.

1. **A PERFECT FIT:** Personalised sport for health and fitness

2. **TRACKSUITS TO BUSINESS SUITS:** Market pressures and new business models

3. **FROM EXTREME TO MAINSTREAM:** The rise of lifestyle sports

4. **NEW WEALTH NEW TALENT:** Economic growth and sports development in Asia

5. **MORE THAN SPORT:** The attainment of health, community and overseas aid objectives via sport

6. **EVERYBODY'S GAME:** Demographic, generational and cultural change

Global Commercial Trends in Sports[48]

The development of a new mountain biking sporting option in Western Australia and a sustainable, professional mountain biking facility will be impacted by the ability to successfully navigate many of the commercial trends in sport on a global level. Examples of the top 10 trends, as identified in the Neilsen Sports Report in 2017 include:

1. **The emergence of new sporting powers, led by China**

2. **IP owners taking control of content and the conversation**

3. **Changing attention spans prompting rights holders to rethink**

4. **The greater fusion of sports and entertainment**

5. **Live sport gaining traction on live content and social media**

6. **New revenue streams emerging as fans get fully connected**

7. **eSports is emerging as more of a global force**

8. **Social responsibility becoming more prevalent and impactful**

9. **Increased investments in data and CRM central to optimising customer/fan relationships**

10. **More focus than ever on cracking the sponsorship ROI code**

[48] Commercial Trends in Sport 2017 - Nielsen Sports Report

Strategic Directions WA Sport & Rec Industry[49]

Key statistics impacting on the industry in Western Australia:

- Almost two-thirds of Western Australian children ride a bicycle, and over half rollerblade or ride a skateboard or a scooter. Participation in these recreational activities is higher than in any organised sport

- In 2013, 1.2 million Australians volunteered their time to a sport or recreation organisation.

- A 2014 study of Year 6 Australian children (aged 10 and 11) found that 15% of girls and 59% of boys demonstrated competence in kicking, 19% of girls and 58% of boys were competent in over-arm throwing and 58% of girls and 72% of boys were competent in catching.

- Over 63% of Western Australian children participated in organised sport in 2012. Evidence suggests that Australian born children are twice as likely to participate in organised sport than those born in a non-English speaking country overseas.

- Between 2013 and 2014, Perth had the fastest population growth rate among Australia's capital cities, with the largest population growth occurring in the outer suburban areas of Greater Perth.

- Population projections indicate that the proportion of the population aged 65 and above is expected to increase substantially in comparison to all other ages, from 12.5% of the total population in 2013 to 20.7% in 2061.

- In 2013, Australian adults spent on average four hours a day in sedentary leisure activities (such as watching television) compared with only half an hour of physical activity.

- By 2015, 88% of Western Australian households had internet access at home, up from 68% in 2006-2007.

To address current and emerging issues in key strategic areas, the sport and recreation industry in Western Australia must tackle the following Challenges:

1. GOVERNANCE

Western Australia's sport and recreation organisations must proactively engage national and state/territory counterparts in developing governance models that are collaborative and strategically aligned partnerships. These models must balance local context and interest as well as national priorities.

2. INTEGRITY AND VALUES

Sport and recreation interests must proactively develop responses to safeguard the integrity and wholesome values which make sport and recreation a fundamental part of Australian culture. The integrity that has encouraged participants, partners, sponsors and governments to invest time, effort and resources needs active protection.

3. PUBLIC OPEN SPACE AND URBAN FORM

Urban parklands and green spaces for sport and active recreation are integral components of urban infrastructure and make a significant contribution to

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[49] Strategic Directions for the WA Sport & Rec Industry 2016-2020 – WA Dept Sport & Rec

community health and wellbeing. In order to deliver public open space which meets the needs of communities into the future we must be efficient with resources, focus on the function of sites, provide equitable access to facilities and secure strategically important regional scale spaces.

4. ADVENTURE AND OUTDOOR RECREATION

Western Australia is a destination point for numerous adventure and outdoor recreation pursuits. Stakeholders from the public, private and community sectors must engage collaboratively to deliver high-quality activities, services and facilities to satisfy and sustain the growing demand, while protecting the environments where these activities take place.

5. COMMERCIALISATION

A small number of high profile sports with significant participation bases and integrated competition structures now have robust commercially oriented business models, while community-based sport and recreation organisations are increasingly reliant on public investment for their survival. Public investment in sport and recreation organisations should factor in the capacity of these organisations to source commercial revenue.

6. DIVERSITY IN LEADERSHIP AND MANAGEMENT

Initiatives are needed to expedite diversity in Western Australia's sport and recreation landscape at all levels of leadership and management. Sport and recreation organisations must be proactive to increase the contribution that currently underrepresented groups within the community, particularly women, are able to make to the industry.

7. FINANCIAL [UN]CERTAINTY

The sport and recreation industry must optimise the value derived from public and private funding in tight fiscal circumstances. Sport and recreation stakeholders must be strong advocates for the many benefits that are enabled by continued investment.

8. LEVERAGING FACILITIES INVESTMENT

Stakeholders must leverage the investment made in sport and recreation facilities and infrastructure over the past decade. Securing high profile events and increasing visitor and local participation will add vibrancy to our communities and convert these places and spaces into business drivers, delivering extensive economic benefits to Western Australia.

9. LIFE COURSE AND LIFE STAGE PARTICIPATION

The achievement of improved participation rates in sport and recreation, and more broadly active lifestyles, will require innovative responses to the life course and life stage circumstances of Western Australians. A combination of expanding pioneering initiatives and adapting successful concepts from other jurisdictions can stimulate healthier and socially beneficial outcomes for our community.

10. MONITORING, EVIDENCE AND RESEARCH

Research and evidence-based decision making are increasingly important for sport and recreation. Availability and utilisation of reputable information will be vital for future policy development and strategic planning.

11. PARTICIPATION, CULTURE AND AFFORDABILITY

Sport and recreation provides opportunities to embrace those otherwise often excluded in the community. Opportunities should be affordable and provide equitable access to encourage participation of people from diverse social, cultural and economic backgrounds.

12. TECHNOLOGY

Western Australia's sport and recreation landscape must embrace opportunities to progress the industry through new and emerging technologies. Astute sourcing of technological innovations that enhance core values, support participation and performance outcomes and promote organisational sustainability will be crucial.

13. VITAL VOLUNTEERS

The engagement of volunteers in sport and recreation is vital for the industry to thrive and deliver personal and social benefits. Sport and recreation organisations must devise responsive and accommodating approaches to recruit, support and retain the vital volunteer base which facilitates the delivery of sport and recreation activities.

Section 14:

School Excursions: Outdoor Education and Recreation

14. School Excursions: Outdoor Ed/Rec

School Excursions

To attract the school groups excursions market, sport, recreation and leisure facility operators and managers must adhere to the requirements of an Excursion Management Plan required by the Western Australian Department of Education Policy 'Excursions (Off School Site Activities)'.

Note this Policy applies to public schools only, however similar Policies may apply to independent and private schools.

Student to instructor ratio factors must also be adhered to and differ depending on the type of activity being undertaken e.g. mountain biking instruction or abseiling instruction.

WA Public Schools: Excursions (Off School Site Activities) Policy

Policy Statement

- School excursions are undertaken to further students' learning and social skills development outside their normal school environment.

Policy Rules

- Principals will:
  - Approve only those excursions that have a clear educational purpose;
  - Not approve excursions involving high-risk activities; and
  - Confirm that all excursions are planned, approved and conducted in accordance with the Excursions in Public Schools Procedures.

See Attachment 4: Excursion Management Plan Teacher Resource – Point Peron Camp School

Download WA Department of Education Full Excursions (Off School Site Activities) Policy at:

http://det.wa.edu.au/policies/detcms/policy-planning-and-accountability/policies-framework/policies/excursions-in-public-schools-policy-and-procedures.en?cat-id=3457100

Relevant inclusions pertaining to mountain bike riding and outdoor recreation activities in the WA Department of Education's **Outdoor Education and Recreation Activities for Public Schools Policy** include:

- **Cycling and Touring**
  - Mountain biking
  - Cycle touring
  - Bicycle motor cross (BMX)
  - Mountain biking
  - Road and track racing
  - Road safety

- **Abseiling, Climbing and Ropes Courses**
  - Abseiling
  - Belaying
  - Climbing
  - Dynamic Rope

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- **Climbing Walls**

    - Abseiling

    - Belaying

    - Bouldering

    - Climbing

    - Dynamic Rope

- **Orienteering, Rogaining and Cross-Country Navigation**

- **Bushwalking**

- **Camping**

Access WA Department of Education Full Outdoor Education and Recreation Activities for Public Schools Policy at:

http://det.wa.edu.au/policies/detcms/policy-planning-and-accountability/policies-framework/policies/outdoor-education-and-recreation-activities.en?cat-id=3457100

Note – This Policy is in a transition phase to December 2019 by the Department of Education

Section 15:

Sport and Outdoor Recreation Training

15. Sport and Outdoor Recreation Training

An opportunity for Bindoon Mountain Bike and Adventure Park to provide nationally accredited sport and recreation training in partnership with a Registered Training Organisation and/or industry association may be a drawcard to establish partnerships or supplier agreements with schools, TAFEs or other interested groups.

Aligning activities with school curriculum activities and goals may attract participation and university partnerships for internships and practical experience across a range of sports-related qualifications may also be advantageous.

Participating students (or graduates) may be a valuable stream for employee recruitment for the business and casual labour source.

This opportunity may provide a training and career pathway for local residents that has previously unavailable at a local level.

An additional training product for the delivery of mountain biking and adventure activity training workshops and camps may also be realised through this concept.

Note: Other industry sector qualifications, units of competency, skill sets, traineeships etc. may also complement the business and labour pool e.g. hospitality, tourism and business training.

The credibility of trained, qualified staff and a 'Centre of Excellence' for Mountain Biking and Adventure Skills Training in Western Australia may be another drawcard for visitation, broader investment, and further propel the Shire of Chittering and Bindoon Mountain Bike and Adventure Park as a leading agency for mountain bike sports in Western Australia

Sport & Recreation VET Qualifications Update

Current nationally accredited vocational education and training (VET) sport and recreation qualifications in Australia (YE 2018) are outlined in the table to follow.

Sport and Recreation VET Qualifications		
Code	Qualification Name	# Registered Training Organisations
SIS20412	Certificate II in Sport Career Oriented Participation	6
SIS20513	Certificate II in Sport Coaching	41
SIS30613	Certificate III in Sport Career Oriented Participation	11
SIS30713	Certificate III in Sport Coaching	21
SIS30813	Certificate III in Sports Trainer	11
SIS30913	Certificate III in Sport Officiating	0
SIS40512	Certificate IV in Sport Coaching	10
SIS40612	Certificate IV in Sport Development	11
SIS50512	Diploma of Sport Coaching	9
SIS50612	Diploma of Sport Development	46
SIS10115	Certificate I in Sport and Recreation	31
SIS20115	Certificate II in Sport and Recreation	64
SIS30115	Certificate III in Sport and Recreation	62
SIS40115	Certificate IV in Sport and Recreation	10
SIS50115	Diploma of Sport and Recreation Management	22

Table 21: Sport and Recreation VET Qualifications

MTB-related VET Units of Competency / Skill Sets

Capacity may exist for delivery of nationally accredited mountain biking and adventure related specialist Units of Competency (YE 2018) from the national VET Sport, Fitness and Recreation Training Package. Shorter units of competencies (versus full qualifications) may act as professional development for people wishing to pursue a career in their chosen field, or for recreation and personal development purposes e.g. Training camps, day workshops etc.

Examples of Units of Competency have been provided in the below.

Mountain Biking, Adventure and Coaching Units of Competency	
Code	**Unit of Competency**
SISSS00070	Mountain Bike Guide (Controlled to Intermediate Environment)
SISSS00071	Mountain Bike Guide (Intermediate Environment)
SISSS00072	Mountain Bike Instructor (Intermediate Environment)
SISSS00052	Cycle Tour Guide On Road (Day Tours)
SISSS00053	Cycle Tour Guide On Road (Overnight and Extended Tours)
SISSS00054	Cycle Tour Instructor On Road (Overnight and Extended Tours)
SISSS00063	Intermediate Coach
SISSS00008	Advanced Coach
SISSS00009	Advanced Officiating
+ other Units of Competency such as: Abseiling, Bushwalking Guide; Climbing	

Mountain Biking, Adventure and Coaching Units of Competency	
Code	**Unit of Competency**
Guide; Climbing Instructor; Challenge Ropes etc.	

Table 22: MTB, Adventure and Coaching Units of Competency

Higher Education Pathways - Outdoor Recreation

A Bachelor of Outdoor Recreation is delivered through Notre Dame University in Fremantle.

Entry to this degree for mature students can be through a Certificate IV level VET qualification.

Mountain Bike Australia Coaching[50]

Level 0 MTB Skills Instructor

The **Level 0 MTB Skills Instructor** course is the entry point to the Mountain Bike Australia coaching pathway and is aimed at parents, clubs and teachers who want to learn the basics of group management, risk assessment and skills teaching techniques.

Participants successfully completing the course will be equipped to lead beginner group rides and assist Level 1 Instructors in delivering basic skills instruction sessions.

The accreditation involves approximately 3 hours of pre-course work followed

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[50] Mountain Bike Australia coaching courses

by a 1 day face to face course.

There are no post course requirements and successful participants will gain their accreditation at the end of the course.

Course Cost: $240

Level 1 MTB Skills Instructor

The **Level 1 Mountain Bike Skills Instructor** course is a two-day theory and trail intensive aimed at Level 0 Instructors wanting to accelerate their instructing to the next level.

Upon successful completion participants will be equipped to teach CX style mounting and dismounting, cornering, pumping the trail, track stands, riding rock gardens, small step ups, small drop-offs, steep climbs and switchbacks on blue trails.

Level 1 will feature an emphasis on instructor's ability to demonstrate trail riding skills to best industry standard as well as consolidation of level 0 instructing methods.

Accreditation will involve a pre-course trail audit and a two-day course split between theory sessions and plenty of time on the trail. Assessments will include pre-course trail audit, instructing on a blue trail, risk management documentation and trailside mechanical repairs.

There are no post course requirements and successful participants will gain their accreditation at the end of the course.

Course Cost: $495

UCI Level 2 MTB Coach

The **UCI Level 2 MTB Coach** course is for coaches who want to work with elite athletes competing in National Championships or International competition. In particular, this course provides the underpinning knowledge for coaching an emerging elite young athlete who seeks to represent Australia at Junior or Under 23 international events.

This course is delivered over six days by a leading expert chosen by the UCI. The course provides in-depth information on the physiology and physiological assessment of an athlete, performance monitoring and assessment, sports psychology in cycling, advanced racing skills and race preparation, and recovery and crisis management of the injured cyclist.

Course Cost: On application

Section 16:

Economic Contribution

16. Economic Contribution

Economic Impact

There are a number of factors which can contribute to evaluating the economic impact the proposed Bindoon Mountain Bike and Adventure Park development may have on the Bindoon town and broader Shire of Chittering.

Contributors to Economic Impact

Construction
- The construction phase will provide a genuine boost to the local economy via such things as creation of jobs and boosts to local business trade such as accommodation, retail, hospitality etc

Operational
- Operational impacts largely revolve around creation of new employment opportunities and the need to access goods and services

Events
- It is acknowledged in industry that events play a major part in the viability of a trail development. Well run events scheduled annually/biannually can encourage riders from domestic and international markets providing a tremendous benefit to the local

Figure 67: Contributors to economic impact

Benefits of Economic Impact

Health and Well Being
- Having a quality activity on the doorstep of the town can help provide stimulus for additonal recreational activity. Furthermore other ecnomic benefits can also flow on to improvements in local infrastructure which support recreational participation

Employment
- Employment benefits can be derived from the operational roll out of the new development, potential for new business operations etc.

Business Incubation
- Flow on benefits from increased visitation creating the need for more businesses and services which incubates new business ventures. Property values have also been known to benefit

Figure 68: Benefits of Economic Impact

In assessing the overall potential economic benefit, there are a number of assumptions that need to be clarified:

- Visitor numbers are based on delivering a quality development which is well supported by a comprehensive marketing strategy and budget

- All proposed stages are fully completed

- Spending habits of the mountain biking market segment and visitors

are the same as standard tourist spending habits

- A buy in from local businesses to support the need for growth in the provision of complementary products and services

In 2018, as part of the strategic tourism vision for the Northern Growth Alliance which combines the Shires of Gingin, Chittering and Dandaragan, a report from Remplan (specialists in providing area specific data delivered by a team of economists, planners, demographers and analysts) was commissioned. The report included a range of economic data based around tourism.[51]

Fundamental to providing some insight into what economic benefit the proposed Bindoon Mountain Bike and Adventure Park development may contribute is the following Remplan data which formed part of the Northern Growth Alliance – Tourism Strategy Report April 2019.

Note: The Northern Growth Alliance – Tourism Strategy Report remains as a draft only at the time of writing this document. All assumptions and background to inputs can be found in the aforementioned report

Economic Output Attributable to Tourism by Industry Sector[52]

The economic output attributable to tourism shows the gross revenue in prices generated by businesses and organisations in the Shire of Chittering to service demand generated by tourists to the area. The proposed mountain bike trail development would likely add to the top performing industry sectors such as food and accommodation, recreation and retail, as highlighted in the following table.

Economic Output: Shire of Chittering (S) (Jun 2018)		
Industry Sector	$M	%
Agriculture, Forestry and Fishing	$115.633	18.1%
Construction	$106.357	16.6%
Financial and Insurance Services	$94.599	14.8%
Mining	$90.868	14.2%
Ownership of Dwellings	$48.627	7.6%
Manufacturing	$46.002	7.2%
Transport, Postal and Warehousing	$20.968	3.3%
Wholesale Trade	$18.586	2.9%
Public Administration and Safety	$16.304	2.5%
Professional, Scientific and Technical Services	$14.337	2.2%
Education and Training	$13.611	2.1%
Tourism	**$11.951**	**1.9%**
Administrative and Support Services	$9.198	1.4%
Retail Trade	**$8.856**	**1.4%**
Other Services	$6.409	1.0%
Rental, Hiring and Real Estate Services	$3.646	0.6%
Information Media and Telecommunications	$3.645	0.6%
Health Care and Social Assistance	$3.239	0.5%
Arts and Recreation Services	**$3.047**	**0.5%**
Accommodation and Food Services	**$2.604**	**0.4%**
Electricity, Gas, Water and Waste Services	$0.931	0.1%
Total	**$639.417**	

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[51] Northern Growth Alliance Tourism Strategy, Wheatbelt Development Commission, Apr 2019

[52] Remplan 2018 Data - Northern Growth Alliance Tourism Strategy

Proposed development to have a positive impact on these industry sectors

→ **Tourism**

→ **Retail Trade**

→ **Arts and Recreation Services**

→ **Accommodation and Food Services**

Although there is a significant $11.95m in economic contribution to the Shire of Chittering, this total represents only 1.87% of the overall economic contribution across all industries, ranking tourism 12th, well behind the primary industries of agriculture and construction which represent 18.08% and 16.63% respectively.[53]

Another interesting comparison here is compared to the other Shires involved in the Northern Growth Alliance (Shires of Dandaragan and Gingin), the Shire of Chittering's tourism economic output is only 18% of the overall combined tourism economic contribution.

This represents the geographical benefits of the other two Shires that include

coastal towns such as Lancelin, Cervantes and Jurien Bay, and have an existing, well regarded tourism brand and product.

What the above figures do represent is that in the Shire of Chittering, there is room for growth to improve the economic contribution of tourism to the region, by taking advantage of the area's natural assets such as the escarpment and topography to deliver a new tourism product. Much the same as the Shires of Gingin and Dandaragan do, by taking advantage of their own natural coastal assets by providing support and incentives to drive and grow tourism product and visitation.[54]

By using a variety of visitor number inputs, the Northern Growth Alliance Tourism Strategy Report also provided an average spend per visitor under a direct impact scenario.

Report Impact Scenario: Average spend per visitor[55]			
Visitor Profile	**Domestic Day**	**Domestic Overnight**	**International**
Average spend per trip ($)	$97	$231	$85

Table 23: Northern Growth Alliance Report Impact Scenario

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[53] Remplan 2018 Data - Northern Growth Alliance Tourism Strategy

[54] Remplan 2018 Data - Northern Growth Alliance Tourism Strategy

[55] Remplan 2018 Data - Northern Growth Alliance Tourism Strategy

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To provide a simplistic overview as to the potential economic contribution of the Bindoon Mountain Bike and Adventure Park, using Tourism Research Australia data, the calculation of visitation, average spend, direct expenditure and employment generation results in a projected economic contribution model as overviewed below.[56]

Estimated Park Annual Visitation 17,200 × Average Day Visitor Spend $97 = Potential Direct Economic Contribution $1.67m

$1.67m Tourism Consumption ➤➤ 11 Full Time Employment Positions Created
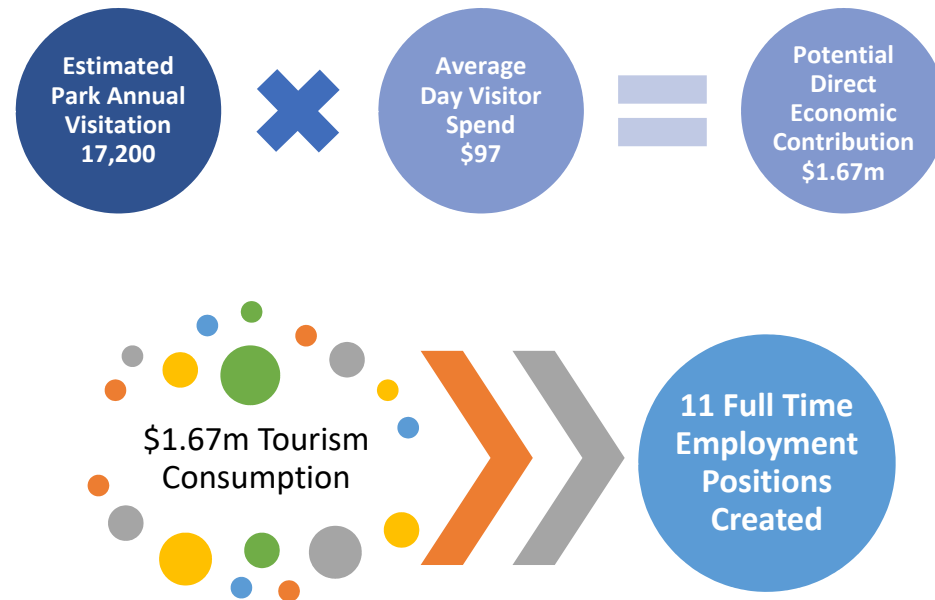
Figure 69: Potential Direct Economic Contribution

As detailed previously, the above projections only include inputs for riders/users and not visitors/family who accompany them and is only projected for direct contribution.

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[56] Tourism Research Australia Statistical Data, 2015

Section 17:

Design Concept

17. Design Concept

Design Concept

Overview

The Bindoon Mountain Bike and Adventure Park Design Concept is intended to align with the Australian Mountain Bike Management Guideline principles where possible to ensure that a quality benchmark level development can be delivered to the broader West Australian mountain bike market segment.

The size (89.5ha) and topography of the subject site allows for a broad range of trail networks and trail difficulties to be included, essential to creating a marketable mountain biking and adventure product which can be used as a stimulus to the local tourism landscape by value adding to existing product and event schedules in the Shire of Chittering.

Broadly, the subject site dictates the mountain bike and walking trail development with descending trails forming most of the overall trail network. Using a baseline summit point as the apex from which the trails can be established, the site is then broken down into two developable locations.

1. **West of the Summit Point:** Heavily vegetated and higher gradient which suits a range of blue/black mountain bike trails areas. This area whilst heavily vegetated can provide riders with an intense rider experience and also because of the vegetation, will have very little impact on the visual aspect of the subject site from the Bindoon town centre and Great Northern Highway, which will retain the existing rural amenity of the landscape.

2. **East of the Summit Point:** Lightly vegetated allowing for more flexibility to decrease the intensity of the rider experience by easily following the contour lines to wash speed. Included in the East is also

a pocket of mid-range vegetation, which can suit the next level of blue trails.

Figure 70: Landgate Aerial Map of Lot 3874, Bindoon

Layout Concepts

After an assessment of the subject site, and taking into account accessibility, topography and the inclusion of features which can enhance the overall marketability of the development, two broad layout concepts have been suggested. Both design concepts incorporate a portion of land identified for future caravan park development. The reason for this is to create easier access to the site and to create better operating efficiencies for the onsite activities. It is considered that should the caravan park development proceed, the two developments should have an alignment to capitalise on potential co-location efficiencies, operating efficiencies and construction efficiencies.

1. **Concept 1** incorporates the development within the existing boundaries of the subject site, a portion of the proposed caravan park development site.

2. **Concept 2** requires an additional parcel of land (plus a portion of the proposed caravan park development site) which will enable a better alignment of features and rider access, and ultimately will result in a better rider and customer experience.

   The thought process behind this is based on the key factor that the additional land required is under the same ownership of the subject site.

   Preliminary discussions have indicated that some form of agreement could be achieved to facilitate this option. This is the preferred option and is also the option from which cost estimates have been based.

Refer to the attached site layouts which identify the additional acquisition footprint and relative boundaries.

Design Objectives

Simply the design objectives are:

- Utilise the natural contours of the site to minimise construction activity

- Minimise clearing and vegetation removal

- Implement a forward-thinking design to ensure ongoing maintenance and sustainability can be better managed

- Create rider experiences for all skill levels

- Consider the consultation and survey feedback to ensure the design concept is market relevant

- Create easy trail linkages for safe and measured rider skill progression

- Install comfortable and inviting infrastructure/activities to encourage non-mountain bike riders to visit

- Develop a product which can stimulate increased tourism in the area

- Use the natural assets of the area as a marketable product to enhance the economic flow from increased visitation

- Future proof the design to keep up with market trends

- Stage the design to align with funding allocations and to offer marketable rider and customer experiences

- Take advantage of the proximity to existing infrastructure and the proximity to the Bindoon town centre

- Create sustainable revenue and add-on revenue streams

Of the above, an important design objective is to implement design methods and relevant infrastructure to support the need of sustainable revenue generation.

Much the same as a golf course, mountain bike trails are exposed to people not conforming with the required process and use the large expanse of the site to try and gain free access. By designing a well secured and laid out trail head and trail hub, the desire to try and gain free access can be softened.

Again, similar to a golf course, the design concept includes well designed multi use building from which the following can be operated:

- Reception/check in

- Bike repair/maintenance

- Bike hygiene/wash down

- Secure lockers for user valuables

- Administration

- First aid room

- Other add-on products and services [see Section 23 Financial Planning and Analysis, Potential Forms of Value-Add Sales revenue]

It is important to note the above services and offerings are mostly directly related to mountain biking. To ensure the development supports existing local businesses, any other typical offerings, which may normally be part of the same footprint such as food, refreshments etc, can be easily access from the town centre.

This is a sensible way of maximising the benefits of how the close proximity of the trail head area can support the Bindoon town site.

Additionally, the sports complex can also provide space for other required uses such as events gatherings, event ceremonies etc.

Design concept and features are detailed in the table to follow.

Design Concept Features

Design Concept Features					
Map Legend	**Feature**	**Description**	**Quantity**	**Overall Length/Area**	**Stage**
1.	Trail Head / Trail Hub/ Toilets and BBQ	The **Trail Head** is essentially the entry point or hub point of the development and is accessed easily from Great Northern Highway and creates opportunities to benefit from the proximity to the Bindoon townsite and the ability to co-locate some services etc via existing buildings such as the sports complex. The Trail Head area would be developed to cater for large groups with ample parking made available. The key to the Trail Head design is also to provide the necessary infrastructure to ensure paying customers can be captured and to also discourage people from attempting to use the facility without paying. A simple building design to house activities such as reception, bike maintenance etc. may be initiated and also encompass a large central covered area to be built as the main communal area that could be fitted out with timber table and bench seating under the roof for year-round customer comfort. To ensure there is adequate and comfortable areas for non-riders, a number of covered BBQ seating areas could be built, which aligns with the methodology to include the family/friends of riders and adventure park enthusiasts to also visit the Park.	1	3,000m2	1
2.	Pump/ Jump, Skills and Adventure Park	**Pump Track:** Closed circuit with rollers and berms. Designed to be ridden without pedalling by using weight shifts (pumping) and gravity.[57]	1	7,000m2	1 & 2

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[57] Australian Mountain Bike Management Guidelines

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Design Concept Features

Map Legend	Feature	Description	Quantity	Overall Length/Area	Stage
		Skills Park: Purpose-built venue with features to build technical skills. Well-designed skills parks allow riders to progress safely from beginner to advanced levels.[58] **Adventure Park:** A range of purpose-built obstacles or activities to encourage non-rider participation. Also designed to appeal to the schools, corporate and sports club markets. This area, as detailed by the green circle on the layout plan, would essentially cover a portion of the old golf course area. The topography of this area is well suited to the creation of Pump Tracks, Skills Tracks and Jump Tracks. Suiting everybody from the beginner to the elite riders. Via clever and thorough design work this area could also encompass part of a Cross Country Racetrack (Cross Country Track) running through it to bring the riders and the not so able-bodied spectators closer and feel part of the action. Being located within viewing distance from the Trail Head, creates another layer of visual stimulation for non-riders who are visiting the Park and makes management/ticketing easier to control. Adjacent to the track section is an Adventure Park, with a range of purpose-built obstacles, climbing activities and fitness test activities suitable to a variety of consumer markets, young and old.			
3.	**Flying Fox/Zip Line**	The open park land style of the old golf course makes a great area for a Flying Fox/Zip Line. Similarly to the Pump Track area, the topography suits the gradient required to install and operate a fun zip line activity.	1	100 lm	1

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[58] Australian Mountain Bike Management Guidelines

Design Concept Features					
Map Legend	Feature	Description	Quantity	Overall Length/Area	Stage
4.	**Green Circuit Walk/Ride Trail**	The green trail would be developed as a smoother surface trail, with trail surfacing used if/where required. This single direction (clockwise) trail is for walkers and riders. The trail hugs the boundary line of the property and performs a number of 'rolls'. The initial roll is designed to give the beginner riders a fun trail to ride on and gives walkers access to the whole area. It also acts as the access trail to a number of different rated climbing trails, as well as acting as the return trail for all the descending trails back to the bottom surface lift area in the south eastern corner of the site. As an expanded use trail, this area could also be developed wide enough for staff quad motor bike or golf cart access and for maintenance and emergency access purposes. Natural contours and formations are utilised as a more sustainable approach to construction.		5,000 linear metres	1
5.	**Black/Blue Trails Areas**	It is recommended that these areas are developed in a staged approach. The trails combination is a mixture of climbing and descending trails with the main focus being on the descending trails, a broad range of styles from technical cross country/downhill trails to the more man-made jump/flow style trail are also included. The more heavily vegetated bush section on the Western section facing the Bindoon town site has the more technical handmade style trails created, so as to make the trail network on this face have a minimal visual impact from the Town site and Great Northern Highway. Careful alignment principles should be taken in the final design work to allow for the linking of trails together so it is possible to have alternate and varying riding experiences on the hill via the interchangeable nature of the linkage, allowing riders to swap from		9,000 linear metres	1,2 & 3

Design Concept Features					
Map Legend	**Feature**	**Description**	**Quantity**	**Overall Length/Area**	**Stage**
		blue to black trails with ease as their confidence and skill levels progress. It also enhances the rider experience by offering this change up with easy access and linkage trails. Natural contours and formations are utilised as a more sustainable approach to construction.			
6.	**Blue Trails Areas**	It is recommended that these areas are developed in a staged approach. The trails in this area are a mixture of climbing and descending trails with the main focus on the descending trails offering with a broad range of styles from technical cross country/downhill trails to the more man-made Jump/Flow style trail. As per above careful alignment principles should be taken in the final design work to allow for the linking of trails together so it is possible to have alternate and varying riding experiences on the hill via the interchangeable nature of the linkage work, again also enhancing the rider experience by offering this change up with easy access and linkage trails. Natural contours and formations are utilised as a more sustainable approach to construction.		8,000 linear metres	1,2 & 3
7.	**Green Trails Areas**	It is recommended that these areas are developed in a staged approach. The trails in this area would be descending trails as there is the Green Circuit Trail as the climb. Linkage principles should again be implemented into the final design work to allow for the linking of trails together making it possible to have alternate and varying riding experiences on the hill. Natural contours and formations are utilised as a more sustainable approach to construction.		2,000 linear metres	1,2 & 3

Design Concept Features					
Map Legend	Feature	Description	Quantity	Overall Length/Area	Stage
8.	**Walking/Spectator Access Trail - *Class 3***	To be built as a natural surface class 3 walking trail. This trail will link together scenic vistas and spectator viewing points on the hill. It will also be suitable for adaptive mountain biking, prams, wheelchairs, mobility scooters etc. This trail will be developed in a staged approach.	1	3,000 linear metres	1 & 2
9.	**Mid-Line Point**	The Mid-Line point allows riders to use this area as an additional start point rather than having to keep climbing back to the summit point. With key linkages close by, this is beneficial for riders who are looking to safely increase their skill levels. Natural clearings and site slope should be used as a more sustainable approach to construction.	1	250m2	1
10.	**Summit Point**	As it describes is the main Summit Point of the trial development where riders can access most of the start points of each trail. Largely all trail combinations can be accessed from here. Natural clearings and site slope should be used as a more sustainable approach to construction. This area is also used for the drop off and turn around point for the uplift shuttle bus.	1	1500m2	1
11.	**Green Walk/Ride Trail**	This trail would be developed as a smoother surface trail, with trail surfacing used as required. This dual direction trail is aimed at providing a less intense experience for walkers and riders. The trail hugs the midpoint to summit surface drag uplift and performs a number of rolls. It's first roll is to give the beginner riders a fun trail to ride on and also gives walkers access to the whole area.	1	800 linear metres	1

Design Concept Features					
Map Legend	Feature	Description	Quantity	Overall Length/Area	Stage
		It also acts as the access trail to the different zones if riders don't want to use the mid to summit surface uplift. This trail would also be developed wide enough for staff vehicles, quad bike or golf cart access for maintenance and emergency access purposes.			
	Surface Drag Uplifts	The proposed surface drag uplifts have been designed to take riders back to midline and summit points. Riders are delivered back to the mid-line point from 3 base locations, from there they have the option of descending from that mid-line point again or continuing to use the surface drag uplift to take them back to the summit point.	3		1
	Road Uplift	The road uplift will be an access track from which a shuttle bus can operate taking riders to and from the summit point.	1		1
	Emergency Access Points	These points are established to create easy access for emergency services should there be a need if a rider is injured or other medical emergencies.	3		1
	Public Conveniences	This design concept has included additional toilets around the trail network. It is aimed at improving the experience for males, females, children, adaptive mountain bikers and people with disabilities with easier access to ablution blocks.	3		1
	Signage	As previously discussed in this document, a range of signage will be installed to provide varying layers of benefits, safety and education to all users.	N/A		All

Design Concept Features

Map Legend	Feature	Description	Quantity	Overall Length/Area	Stage
	Fencing	Will be used at various points to discourage people from attempting to use the facility without paying and to maintain strong risk management principles.	N/A		1
	Rest Areas	To align with the consultation feedback, there will be a range of simple rest or recovery/seating areas situated around the trails and the Park. A large covered seating area at the summit will also allow riders/users to prepare/recover or soak up the spectacular scenery prior to their next trail attempt.	N/A		1

Table 24: Design Concept Features

Stage 1: Design Concept

Feature	Quantity	Length/Area
Trail Head, Carpark, Trail Hub	1	3,000m2
Signage	Multiple	N/A
Pump/Jump, Skills and Adventure Park	1	4,000 m2
Zip Line	1	800 lm
Green Circuit Walk/Ride Trail	1	5,000 lm
Black/Blue Trails	6	4,500 lm
Blue Trails	3	4,000 lm
Green Trails	2	1,000 lm
Walking/Spectator Access Trail	1	3,000 lm
Mid-Line Point	1	700m2
Summit Point	1	1500m2
Green Walk/Ride Trail	1	800 lm
Surface Drag Uplift	3	800 lm
Road Shuttle Uplift	1	5,500 lm
Emergency Access Points	3	N/A

Table 25: Stage 1 design concept

Stage 2: Design Concept

Feature	Quantity	Length/Area
Signage	Multiple	N/A
Black/Blue Trails	3	2,250 lm
Blue Trails	2	2,800 lm
Green Trails	1	500 lm
Pump/Jump, Skills and Adventure Park	1	3,000 m2
Walking/Spectator Access Trail	1	3,000 lm

Table 26: Stage 2 design concept

Stage 3: Design Concept

Feature	Quantity	Length/Area
Signage	Multiple	N/A
Black/Blue Trails	3	2,250 lm
Blue Trails	1	1,400 lm
Green Trails	1	500 lm

Table 27: Stage 3 design concept

Construction Scheduling

Note: The Gantt Chart below is a basic overview of what the construction rollout may consist of. Note that many of the tasks are broad and not drilled down to specifics as would be normal for an actual working copy of a Gantt Chart for such a development. Additionally, task links and predecessors are not necessarily in the form of an actual working copy.
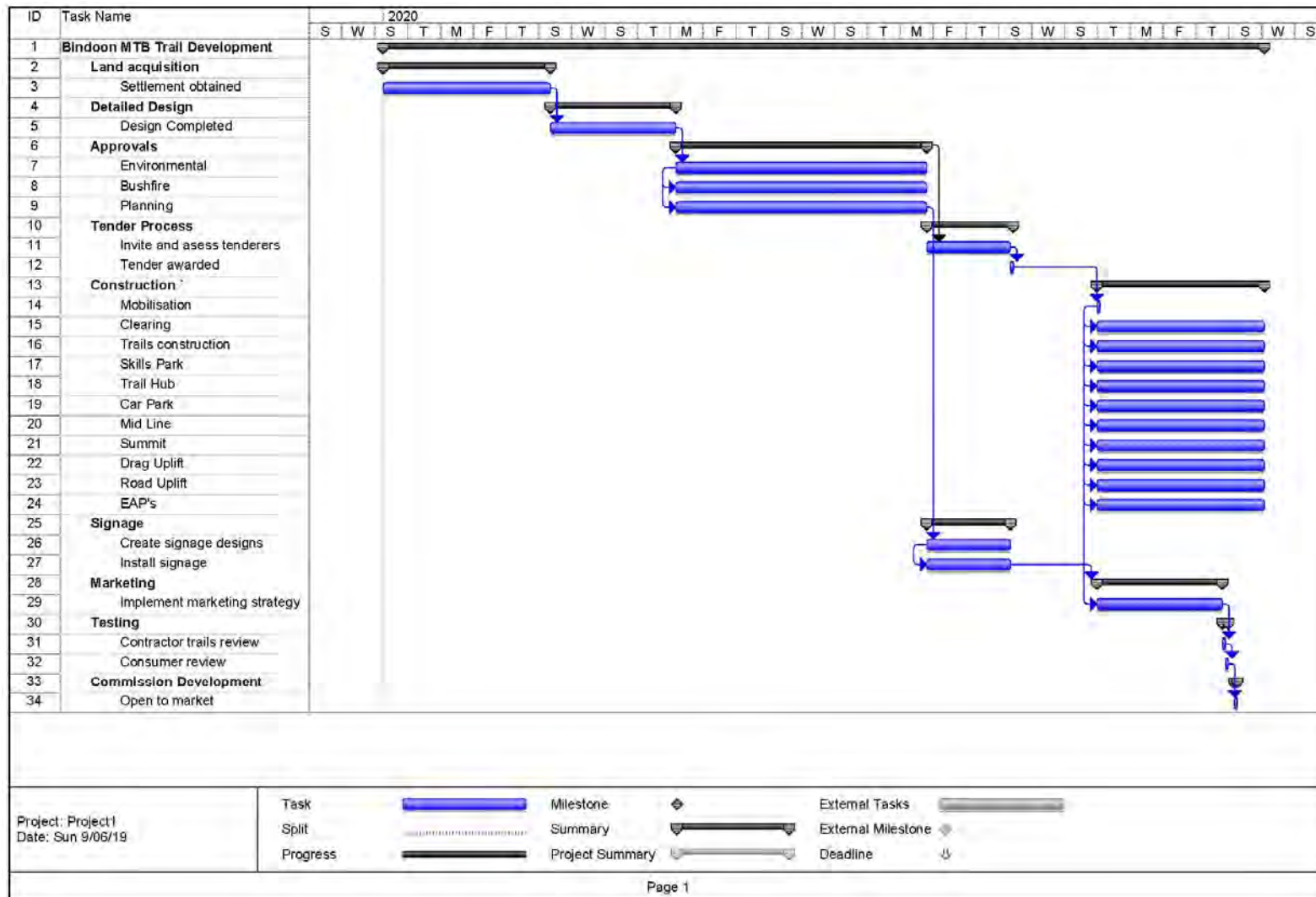

Table 28: Construction scheduling Gantt Chart

Trail Difficulty Rating System

There are two key ratings methodologies from which the proposed Bindoon Mountain Bike and Adventure Park trails system has been derived and have been based directly on the recommendations as detailed in the International Mountain Bicycling Association – Australia, Trail Difficulty Ratings System. The first table represents the difficulty rating for developers to consider when approaching various site topography and landforms as to what type of trail best suits.

Developers Guide to Trail Difficulty Ratings System[59]

	Very easy ○ White Circle	Easy ● Green Circle	Intermediate ■ Blue Square	Difficult ◆ Single Black Diamond	Extreme ◆◆ Double Black Diamond
Description	Likely to be a fire road or wide single track with a gentle gradient, smooth surface and free of obstacles. Frequent encounters are likely with other cyclists, walkers, runners and horse riders.	Likely to be a combination of fire road or wide single track with a gentle gradient, smooth surface and relatively free of obstacles. Short sections may exceed these criteria. Frequent encounters are likely with other cyclists, walkers, runners and horse riders.	Likely to be a single trail with moderate gradients, variable surface and obstacles. Dual use or preferred use Optional lines desirable	Likely to be a challenging single trail with steep gradients, variable surface and many obstacles. Single use and direction Optional lines XC, DH or trials	Extremely difficult trails will incorporate very steep gradients, highly variable surface and unavoidable, severe obstacles. Single use and direction Optional lines XC, DH or trials
Trail Width	2100mm plus or minus 900mm	900mm plus or minus 300mm for tread or bridges.	600mm plus or minus 300mm for tread or bridges.	300mm plus or minus 150mm for tread and bridges. Structures can vary.	150mm plus or minus 100mm for tread or bridges. Structures can vary.
Trail Surface	Hardened or smooth.	Mostly firm and stable.	Possible sections of rocky or loose tread.	Variable and challenging.	Widely variable and unpredictable.
Average Trail Grade	Climbs and descents are mostly shallow. Less than 5% average.	Climbs and descents are mostly shallow, but may include some moderately steep sections. 7% or less average.	Mostly moderate gradients but may include steep sections. 10% or less average.	Contains steeper descents or climbs. 20% or less average.	Expect prolonged steep, loose and rocky descents or climbs. 20% or greater average
Maximum Trail Grade	Max 10%	Max 15%	Max 20% or greater	Max 20% or greater	Max 40% or greater
Level of Trail Exposure	Firm and level fall zone to either side of trail corridor	Exposure to either side of trail corridor includes downward slopes of up to 10%	Exposure to either side of trail corridor includes downward slopes of up to 20%	Exposure to either side of trail corridor includes steep downward slopes or freefall	Exposure to either side of trail corridor includes steep downward slopes or freefall

Table 29: IMBA Australia trail difficulty rating systems

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[59] International Mountain Bicycling Association – Australia, Trail Difficulty Ratings System

The table below represents the trail difficulty system for users. Much of this information is used on various signage around the trail network and the trail head.

## Users Guide to Trail Difficulty Ratings System[60]

	Very easy ⚪ White Circle	Easy 🟢 Green Circle	Intermediate 🟦 Blue Square	Difficult ◆ Single Black Diamond	Extreme ◆◆ Double Black Diamond
Description	Likely to be a fire road or wide single track with a gentle gradient, smooth surface and free of obstacles. Frequent encounters are likely with other cyclists, walkers, runners and horse riders.	Likely to be a combination of fire road or wide single track with a gentle gradient, smooth surface and relatively free of unavoidable obstacles. Short sections may exceed these criteria. Frequent encounters are likely with walkers, runners, horse riders and other cyclists.	Likely to be a single trail with moderate gradients, variable surface and obstacles.	Likely to be a challenging single trail with steep gradients, variable surface and many obstacles.	Extremely difficult trails will incorporate very steep gradients, highly variable surface and unavoidable, severe obstacles.
Suitable for	Beginner/ novice cyclists. Basic bike skills required. Suitable for most bikes.	Beginner/ novice mountain bikers. Basic mountain bike skills required. Suitable for off-road bikes.	Skilled mountain bikers. Suitable for mountain bikes.	Experienced mountain bikers with good skills. Suitable for better quality mountain bikes.	Highly experienced mountain bikers with excellent skills. Suitable for quality mountain bikes.
Fitness Level	Most people in good health.	Most people in good health.	A good standard of fitness.	Higher level of fitness.	Higher level of fitness.
Trail Width	Two riders can ride side by side.	Shoulder width or greater.	Handlebar width or greater.	Can be less than handlebar width.	Can be less than handlebar width.
Trail Surface and obstacles	Hardened with no challenging features on the trail.	Mostly firm and stable. Trail may have obstacles such as logs, roots and rocks.	Possible sections of rocky or loose tread. Trail will have obstacles such as logs, roots and rocks.	Variable and challenging. Unavoidable obstacles such as logs, roots, rocks drop-offs or constructed obstacles.	Widely variable and unpredictable. Expect large, committing and unavoidable obstacles.
Trail Gradient	Climbs and descents are mostly shallow.	Climbs and descents are mostly shallow., but trail may include some moderately steep sections.	Mostly moderate gradients but may include steep sections.	Contains steeper descents or climbs.	Expect prolonged steep, loose and rocky descents or climbs.

Table 30: IMBA Australia trail difficulty rating systems

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[60] International Mountain Bicycling Association – Australia, Trail Difficulty Ratings System

Best Practice Design and Construction[61]

In 2014, at the Australian Mountain Bike Summit, Mountain Bike Australia stated, that there was a need to establish, develop and publish an Australian set of standards or guidelines for the sustainable design and construction of mountain bike trails.

The Australian Mountain Bike Trail Guidelines were developed and released in 2019 in response to a growing need to establish and implement an Australian specific trail development process that guides mountain bike trail planning from proposal to implementation.

Owing to this, it has been important to ensure the proposed Bindoon Mountain Bike and Adventure Park's trail network design and project methodology aligns with the purpose and objectives as detailed in the Australian Mountain Bike Trail Guidelines. Although the guidelines are not a National standard or Regulation, they provide a well-considered framework from which developers can work within.

The purpose of the Australian Mountain Bike Trail Guidelines is to provide an overarching, standardised framework for the planning, development and management of mountain bike trails across Australia.

The guidelines have been developed to:

- **Provide land managers, trail builders, trail users, clubs and groups with practical information and tools to effectively develop and manage mountain bike trail networks**

- **Complement existing information and tools**

- **Provide a consistent approach to mountain bike trail development and management across Australia**

- **Provide an understanding of various styles of mountain biking and the differing user types and their needs**

- **Trails are developed using principles of sustainable planning, design, and construction techniques**

- **Trails are planned and developed in accordance with a consistent trail development process**

Sustainability

Sustainability in any type of development is at the forefront of design objectives and mountain bike trail development is no exception. The increase in popularity of mountain bike trails in Australia has resulted in a core range of design objectives which, whilst not regulatory in their nature, are regarded as benchmark deliverables to ensure developments are reflective of the need to fit into and manage the environment in a sustainable and sensible manner.

Some of the key sustainability approaches as outlined in the Australian Mountain Bike Management Guidelines which have been adopted for the proposed Bindoon mountain bike trail network design concept include[62]:

- **Trail location and alignment**: Making sure that where possible trails fit within the natural contours and natural infrastructure. This assists with drainage and the mitigation of erosion

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[61] Australian Mountain Bike Trail Guidelines, 2019 – Mountain Bike Australia

[62] Australian Mountain Bike Trail Guidelines, 2019 – Mountain Bike Australia

- **Drainage**: Making sure that the design has multiple drainage capture points or compensating basins to ensure that water is able to be removed from the trail and drain along natural flow routes as quickly as possible which helps also minimise erosion

- **Utilising soil type:** Soil types will behave differently for different uses, seasons etc. The initial design concept will only broadly identify soil benefits and constraints, however, if the development progressed, a more detailed understanding of the soil types in and around the trail network, will need to be undertaken

- **Trail gradient:** The design will be featured around maximising the efficiency of each trail grade. Typically, anything up to a 20% gradient, can be considered a sustainable gradient

- **Trail flow:** Uses natural momentum and reduces the need for riders to employ brake and speed washing techniques, which can at times create wear on the trail

- **Minimising trail corridor:** This is the distances either side of the bike tread. Generally, the narrower trail corridor, the less clearing and vegetation removal required

There are a number of other key design features which all offer tremendous sustainability outcomes, these will be further considered and implemented as a more detailed design is undertaken, should the project be deemed a go forward option.

The Importance of Signage

One of the most important facets of mountain bike trail design is signage. The actual signs themselves need to be well designed to relay the desired message in a clear and concise manner. The role of signage is multi layered:

Environmental

Needs to clearly state any environmental awareness to riders that are key to the overall management and sustainability of the development

Essential for safety and user experience

Needs to provide a clear indication of the trail direction and the difficulty of the trail

Signage

Trail Etiquette

Helps increase safety levels, respect for the environment and cultural/historical awareness

Emergency

Clearly identify all emergency information for riders e.g. location, evacuation, muster points

Figure 71: Importance of signage

The primary sign known as the 'trail head sign', provides a complete overview of the trail network, trail difficulty ratings, safety points, navigation and general user information. Typically located in the main carpark area, when well-executed, the trail head sign is an essential component to enhancing the rider experience and creates a strong first impression and initial brand reference. Some excellent examples of a well-laid trail head signs have been provided.

Figure 72: Awaba Mountain Bike Park, New South Wales

Should the proposed development proceed towards a more detailed design phase, a separate signage layout plan, including signage endorse by the Adaptive Mountain Biking community, will be established. This process is generally undertaken upon final acceptance of the overall design masterplan.

Ongoing Trails Management / Safety Assessment

Trail maintenance is pivotal to the ongoing success and usability of any mountain bike trail development. Well designed and constructed trails often require less maintenance, so it is important to consider the upfront development costs to ensure a value for money, design is obtained.

The key factors in approaching and establishing the correct methodology for the proposed trails network include:

- Initial level of design and how detailed and well-constructed the trails are will dictate the output required to maintain the initial standards

- Establish key maintenance standards to ensure the integrity of the initial development is retained

- Access to skilled labour and personnel to undertake the maintenance works

- Access points for maintenance (and also safety), must be incorporated into the initial design

- Access to relevant plant and equipment

- An allocation of funds for the ongoing maintenance must be factored into the cost modelling

Owing to the above points, it is important to treat the trails network as a physical asset, which like any other asset must be maintained to ensure it retains value. In this case the value is based on the trails' ability to sustainably generate revenue from users.

In establishing the maintenance program, the Australian Mountain Bike Trail Guidelines 2019 suggest the following:[63]

1. **Audit**: Assessing the trial for any surface issues, drainage problems, vegetation growth, condition of signage and condition of other structures

2. **Frequency of Maintenance**: This depends on such factors as:
   a. The trail system and classification of trails
   b. The amount and type of use
   c. The type of trail i.e. downhill may require more maintenance than a flat loop
   d. Soil types
   e. Extreme weather events

3. **Standards**: Includes initial trail standard, signage standards, visitor risk management standards

4. **Hazard Identification and Reporting:** Trails are subject to weather events, wear and tear and even vandalism. A HIR plan is essential to manage these issues

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[63] Australian Mountain Bike Trail Guidelines, Mountain Bike Australia, 2019

5. **Monitoring Visitor Statistics**: This will dictate frequency of some maintenance factors i.e. more usage generally requires increased maintenance

6. **Visitor Survey:** Provides feedback to operators regarding issues or improvements to the trail that have not previously been identified

7. **Trail Counters**: Provides an accurate assessment of usage

8. **Marketing**: Keep all user markets informed at all times

9. **Trail Revitalisation:**

    a. Visitors numbers may grow which leads to new/more trails being required

    b. A trail may simply be rendered unusable due to too much degradation

    c. Visitor feedback may lead to the necessity of improving the trail or increasing/lowering the difficulty

It is recommended that should the proposed Bindoon Mountain Bike and Adventure Park development proceed, a comprehensive trail maintenance program incorporating the above industry endorsed activities, should be established.

Safety Principles

Safety for all users underpins the ongoing success and sustainability of any mountain bike trail development and creates an additional layer of marketability to users. Safety measures can be implemented via a range of design initiatives such as:

- Speed filtering

- Alternate lines

- Cornering grades

- Alternate surfaces

Additionally, safety can be increased via:

- Signage

- Ongoing trail maintenance

- Skills parks and access to guides, training and coaches to develop safe progression towards more difficult trails

- Rider education strategies

- Well-structured management principles

Creating and building a 'brand' for the proposed Bindoon Mountain Bike and Adventure Park development will rely heavily on ensuring that safety for all users is acknowledged to exceed benchmark levels.

Point of Difference Design Initiatives

Extending Usage Periods

In Western Australia, typically the months of Autumn, Winter and Spring are considered the peak usage months for mountain bike riders. Summer, whilst still attractive to a portion of the market segment, usually aligns with softer visitation numbers to mountain bike facilities, due to such factors as heat, dusty hard surfaces, increased native fauna activity etc. Notwithstanding this, some of the southern locations in WA with cooler climates can experience a less dramatic drop off in user numbers.

In profiling some of the key attributes of a popular mountain bike trail and

also the seasonal user trends, often a wettened track is one of the factors which appeals to riders. In reference to the term "wettened" it does not necessarily mean a sodden or soaked track, it refers more to a level of moisture in the track which provides more grip and traction for the rider.

As a rather lateral thinking design concept for the proposed Bindoon mountain bike trail network is to consider one or more of the tracks to have a reticulated dripper system installed, which can be used to dampen the tracks at various times to offer riders a better riding experience at a time where the rider experience is less than desirable.

Obviously, there are a myriad of issues to contend with to implement such an initiative, however any attempt to drive and increase user numbers in off peak or shoulder seasons is worthy of consideration. Furthermore, it can create a beneficial point of difference for marketability.

2 Reticluated Trails - 1 for experienced riders and 1 for the entry level rider.

The water source could be facilitated via a stand alone tank, capturing water during winter months. Capacity vs usage would need to be worked through.

Advertise the dampened track initiative as a special event once or twice monthly Jan - Mar.
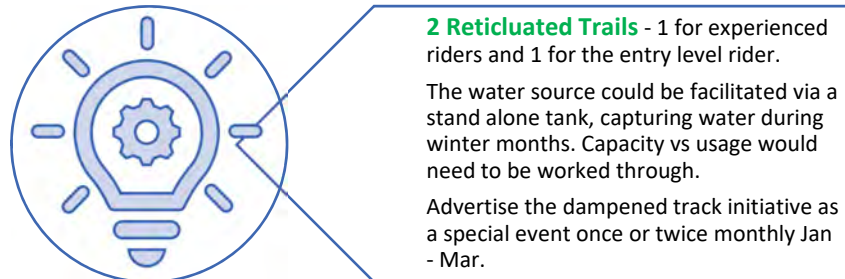
Figure 73: Reticulated trails concept

Extending User Markets

Mountain biking is an individual sport and encouraging other family members/friends to visit locations such as the proposed Bindoon Mountain Bike and Adventure Park, even though they may not be interested in the riding activity, requires well considered initiatives.

When considering what activities may be beneficial, it is important to relate the applicable cost of capital involved, against potential visitor number increases. The below table lists some key initiatives to support the objective of broadening the user markets.

By diversifying attraction activities and consumer markets, opportunities to create a more sustainable business model are enhanced.

Examples of innovative concept initiatives with the goal of diversifying infrastructure, products and services to attract a broad range of consumers to visit the proposed Bindoon Mountain Bike and Adventure Park has been provided.

★ Mountain Bike Surface Drag Uplift

Unique point of difference

Initiative	Aim	ROI Capacity
An MTB surface drag uplift installed at a mountain bike park development has a 2-fold benefit for riders: 1. It is a great initiative for riders to maximise their rider time by making the climb back to the summit quicker, rather than waiting for the typical shuttle road uplift 2. It helps riders preserve energy allowing them to ride for longer	• To be highly competitive with other mountain bike trails in Western Australia • First mountain bike surface uplift in WA • World-class attribute	• Medium capital outlay • Pay per use or session/season passes for return on investment • Improved visitor interest and experience – more mountain biking, less climbing

Notes:

A mountain bike surface drag uplift in this context is similar to a ski lift, where riders can be dragged back to the summit point or closer via a motorised cable mechanism and a handy tow bar clamp which attaches to the handlebars of the rider's bike.

There are very few uplifts installed for standalone mountain bike developments and the idea of installing one for the proposed Bindoon development would add a tremendous benefit to the marketability of the operations.

There is a cost implication which needs to be factored and weighed against the potential upside of increased visitation, due to this unique uplift service.

For the purposes of this initial Feasibility Study, an uplift network has been suggested and costed into the overall development of the facility.

**The existence of 2 second-hand t-bar surface drag uplifts from a ski park in the UK, stored in a sea-container in Waroona, has been identified – owner is currently in Europe but may be able to discuss the opportunity to procure this equipment upon his return, late June 2019.

Figure 74: Mountain bike surface lifts, Image: Pro-Tow, Red Bull, Epic Bikepark Leogang

★ Toboggan Track *'Unique point of difference'*

Initiative	Aim	ROI Capacity
A ground-based toboggan track activity at a mountain bike park development is a fun and unique activity for all ages and abilities	• To be highly competitive with other mountain bike trails and adventure park operators in Western Australia • Only ground-based toboggan track in WA • World-class attribute	• Major capital outlay • Pay per use or session/season passes for return on investment • Improved visitor interest and experience

Notes:

A ground-based toboggan track (also known as a Summer Toboggan Run) is designed to adapt to virtually every possible contour and direction change of any given site.

*Uphill transport system for toboggan sleds are also often used in conjunction with the track.

Requiring low operating and maintenance costs, a ground-based toboggan track is an attractive, low-risk investment for ski resorts and family adventure parks – commonly found on the east coast of Australia (e.g. Funfields Theme Park, VIC; The Big Banana, NSW) and internationally.

There is a cost implication which needs to be factored and weighed against the potential upside of increased visitation, due to this unique activity.

This activity has been identified as a potential attraction only and has not been included or costed into the overall development of the facility.

See Toboggan Ride Video: www.youtube.com/watch?v=ghrSQ-g8_rM

Figure 75: Toboggan runs in the USA (top); and The Big Banana toboggan run (bottom)

Wider Green Trails for Families and Adaptive Mountain Bikers		
Initiative	**Aim**	**ROI Capacity**
Construct an agreed number of wider, Green Level trails, more suited to the beginner or adaptive mountain bikers	• Attracting the Adaptive Mountain Biking market • Encouraging parents to engage younger children in the activity, because of the wider track, it is easier for parents to provide support and balance/guidance	• Capital outlay would be minimal, would provide an accessible purpose-built recreation / tourism trails product for families, emerging mountain bikers, and adaptive mountain biker market users, competitions and events

Aboriginal Cultural Tours		
Initiative	**Aim**	**ROI Capacity**
Aboriginal guided tour and experience incorporated into walking trail **Engage Koya Aboriginal Corporation's Aboriginal Nature Trekz (based in Midland) with support from the WA Indigenous Tourism Operators Council**	• Low impact cultural tourism experience on site to mountain bike riders, non-mountain bike riders, families and support crew • High value add-on product for tour, school groups, corporate and government groups seeking a cultural experience, education or awareness product • Opportunity to train Aboriginal people in the community to become tour guides	• No additional capital outlay with external tour operator using existing walking trail and trail head facilities at the Park • Gain market traction and increase visitor spend with the growing popularity of, and government investment in, the West Australian Aboriginal tourism sector

Figure 76: Adaptive Mountain Biking – Image courtesy The Good Scout

Figure 77: Aboriginal cultural experience – Image courtesy Warrang-Bridil

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Outdoor Adventure Park		
Initiative	**Aim**	**ROI Capacity**
Outdoor adventure park featuring activities such as: • **Challenging obstacle courses (kids and adult versions) suitable for team building events and competitions** • **Zipline to capture scenic views from the hill** • **Adventure activities such as low ropes, abseiling tower, leap of faith** • **Kids jumping pillow** **Co-located by external operator/professional instructors**	• Activities to attract children and younger adults who can spend time engaging in challenging physical, mental and personal development pursuits • Activities to attract groups, clubs, schools, recreation camps and tour group markets for leisure, recreation and team building • Differentiate from competing adventure / outdoor recreation parks (obstacle course theme, events)	• Likely high cost of capital to construct • Can be staged according to demand and consumer feedback • Site can be leased or sold to a private investor/operator (opportunity for Expressions of Interest process)

Community Club Fundraising at Chinkabee Sporting Complex		
Initiative	**Aim**	**ROI Capacity**
Partner with local sports clubs for Chinkabee Sporting Complex facilities access and fundraising opportunities	• Park visitor partners, friends or family can relax at a location proximal to the trail head and enjoy a meal, drink, hire tennis courts, corporate bowling etc. • Provide an opportunity for community club revenue or fund raising through facility attendance, sports hire or operation of vending machine supplying packaged food, beverage, supplements, merchandise or souvenirs	• Very low outlay. Just requires some organising and resources. • Community club fundraising opportunities

Figure 78: Adventure park ropes course

Figure 79: Fundraising vending machine for local clubs

Walking Trail Spectator Vantage Points		
Initiative	Aim	ROI Capacity
Walking trail with dedicated spectator vantage points over mountain bike trail sections and scenic vistas	• Partners, friends, children and spectators can get involved in the excitement of the down-hill riding action, take photos, watch competitions etc. or soak up the scenic views on a safe trail, platform or vantage point • Develop interest from non-mountain bike riders to take up the sport and become regular customers of the Park	• Relatively low outlay required. Minimal construction and some vegetation clearing along existing walking trail and accessible areas of mountain bike trails

Year-Round Events and Competitions Calendar		
Initiative	Aim	ROI Capacity
Year-round calendar of events and competitions at the Park: • Unique signature event • Mountain biking • Orienteering • Trails • Obstacle racing • Cycling • Running • Star gazing • School sports • Culinary pop-ups • Glamping pop-ups	• Increase visitation throughout the year, add-value / extend stay for existing local events • Increase overnight visitation during the Shire's traditional low tourist season (December to May) • Develop a strong suite of diverse events in partnership with industry and organisations that will appeal to the local community, new, existing and diverse consumer markets	• Low capital outlay • Partner with external companies and organisations to share costs / profits of ticketed events

Figure 80: Spectator vantage point – Image courtesy Fort William Cup, UK

Figure 81: Pop-up dinner showcasing local produce – Image courtesy Fervor

Long Distance Cycle Network		
Initiative	**Aim**	**ROI Capacity**
Long distance cycle network trail hub link to Park e.g. NorthLink WA Trail, Swan Valley to Chittering Valley Trail	• Bindoon to become a cycle-friendly tourist town • May appeal to the road cycling consumer market and affiliated clubs, competitions and events • Attract road cycling consumers - high visitor spend market	• Major capital outlay • Main Roads WA, NorthLink WA project may fund / activate this network • Variety of activities at the Park and throughout the town may encourage overnight visitation and local spend

Bindoon Town Cycle Trail		
Initiative	**Aim**	**ROI Capacity**
Linked cycle pathway network from Park to rest of town / tourist hot spots / local tavern etc.	• Become to become a cycle-friendly tourist town • May appeal to non-mountain bike riders, families etc. or pre-post ride activities • Leisure opportunity to explore the township and beyond for retail, hospitality, tourist activities etc.	• Medium capital outlay • Encourage economic spend with local businesses

Figure 82: Road cycling event

Figure 83: Family bike ride – Image courtesy Tourism WA

Bindoon Tourist Park – MTB / Cycle Specialist Park		
Initiative	**Aim**	**ROI Capacity**
Caravan, camping and cabin park in the Bindoon town centre ***Opportunity to build Western Australia's first ever, purpose-built MTB/Cycle Friendly Tourist Park with:** • **Bike wash facility** • **Secure bike storage** • **Bike hire access** • **Equipment hire access** • **Bike retail and servicing access** • **MTB Shuttle bus** • **Value add passes**	• Capture visitor markets for extended stays and economic spend with convenient, affordable accommodation options within walking/cycling distance of the Park • Attract families, groups, clubs, schools for extended stays i.e. leisure, training, coaching, events, competitions, camps • Creation of a sustainable caravan park model through diversified target markets	• Major capital outlay • Increased occupancy and revenue from Park-related visitation may make the Shire's financial outlay for a caravan park a more viable option or for private operator / investor consideration • Economic spend in the Shire will increase with more overnight visitation

Co-Located Wildlife Rescue Park		
Initiative	**Aim**	**ROI Capacity**
Wildlife interaction and designated home for Chittering Wildlife Carers *Compete with similar wildlife interactions provided by Adventure World and Outback Splash, whilst developing a new source of fund raising for Chittering Wildlife Carers*	• To provide an additional tourism and feel-good community organisation drawcard to Perth City and International visitors seeking an Australian wildlife interaction • To provide a safe place for injured wildlife to recover • Opportunity for gold coin donations or photo fee to enhance the work and sustainability of Chittering Wildlife Carers • Attractive to tourism operators as part of a broader itinerary	• Capital outlay for Chittering Wildlife Carers (concept may be eligible for grants/funding) • Good customer and community sentiment involving a local wildlife rescue, non-profit organisation in the operation

Figure 84: Caravan and camping park

Figure 85: Wildlife rescue, Image courtesy, Healsville Sanctuary, Victoria

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Local Businesses Development and Buy-in		
Initiative	**Aim**	**ROI Capacity**
Local products and services to cater for mountain biking, cycling, and general visitors to Bindoon: • **Bike hire/sales** • **Safety equipment & accessory hire/sales** • **Bike/tyre repairs** • **Accessories** • **Uplift shuttle bus** • **Training programs** • **Tours** • **Events** • **Food and beverage** • **Merchandise** • **Physiotherapist** • **Health services**	• To provide local businesses and community members with opportunities for new business incubation, growth and expansion • To stimulate jobs growth for Shire residents • To enhance the customer and visitor experience with convenient access to local products and services	• Capital outlay for local businesses and product/service suppliers only • Economic spend in the Shire will increase with Park visitation • Opportunity to encourage new private investment in the Shire

Figure 86: Bike hire

Development Staging

Staging for the mountain bike park development is guided by the following:

1. **Development costs and access to funding**

   Like many projects, the final design of the park and trails network will be based on an overall project cost and how that is assessed as a viable return on investment proposition.

   In assessing the ROI, staging of the development can create a more de-risked approach to the capital outlay required. With the subject site being 89.5ha, there is ample room for trail growth and/or increased alternate activities to be rolled out over a defined period.

   It is recommended that this development follow a rigid process of achieving financial based staging milestones, prior to commencing any additional stages. Some of the financial based outcomes to be considered are:

   • Overall P&L performance

   • Management costs

   • Ongoing maintenance costs

2. **Trail Product Mix**

   Making sure that the trail product mix for each stage is broad enough to attract the desired number of users is paramount. The broader mountain bike market ranges from the beginner rider all the way through to the hard-core event rider.

   Smart developments will ensure that all of these user types are catered for in the one location. If trails are not difficult enough the better riders, (which form the majority of the Western Australian

mountain biking consumer market) tend to get bored and seek alternate locations to achieve their desired enjoyment. Conversely, if trails are too difficult, riders who are just getting into the sport or are gradually looking to increase their skill levels, can be discouraged to visit a location if the risk and difficulty of the trails is too great.

To achieve a balanced product offering, careful consideration of trail difficulty and trail length is essential to build up a well-regarded 'brand' amongst the key mountain bike user groups.

A large degree of finesse is required in the initial development and design concept to roll out trails which are:

- Challenging enough to the hard-core rider

- Variations in length and intensity

- Promote safe skills progression - User friendly enough to encourage new users to the sport to consider Bindoon as a perfect location to build up their skill sets

- Make sure the initial trail network is suitable for all types of bike and does

- Linked efficiently to allow users to steadily progress their own level of skills in a measured and non-risky transition

- Stage one trail design needs to have at least one section which can be used for events to allow for stronger marketing and brand awareness strategies. Events are essential to increase visitation via participants, support crews, family etc.

Future Proofing the Development

Further to a rigid approach to the above principles, staging also allows for the development to be 'future proofed' and maintain relevance within the typical and broader mountain biking market segments.

Mountain biking, like many other sports and pastimes continues to evolve and the expectations of the market segments are frequently changing, for example e-mountain bikes. Increases in bike design and manufacturing, skills trends, safety equipment etc. mean that trail development must have a level of flexibility to ensure market relevance can be achieved at all times.

Staging the development allows for opportunistic assessment of market trends that will attract and maintain a regular user base ongoing.

To achieve this, it is recommended that constant assessment and consumer/user feedback is obtained to ensure the development can continue to attract repeat and new users.

Design Implement Review Adjust Adopt

Figure 87: Future Proofing the Development

Section 18:

Project Implementation

18. Project Implementation
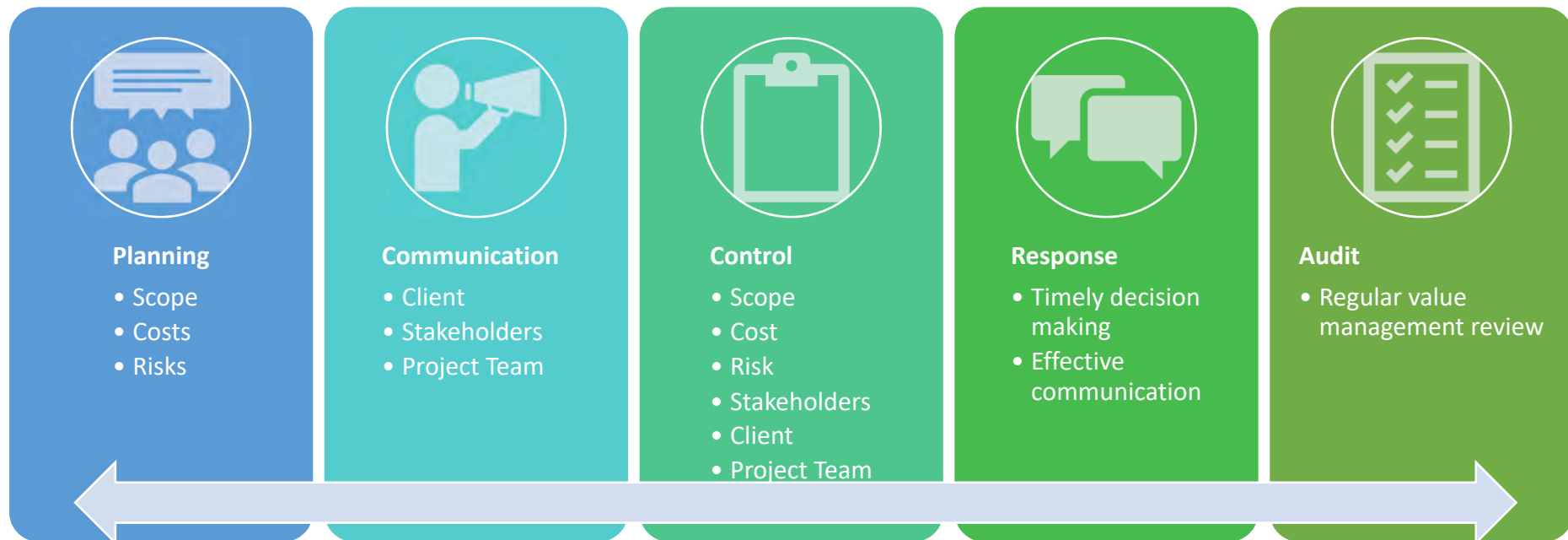
Figure 88: Project implementation overview

The above diagram is a broad overview of the implementation needs for the proposed Bindoon Mountain Bike and Adventure Park development.

Planning

Planning for the proposed Bindoon Mountain Bike and Adventure Park development will require the following phases to be undertaken in greater detail.

As the project is already into the feasibility phase, any advancement towards the development proceeding forward will require the following steps.

As with many similar development projects, a critical path will be established which largely connects each phase by their dependency on that task being achieved:

- Site acquisition

- Detailed trail design

- Detailed costing

- Establish operational model

- Thorough risk management assessment

- Obtain planning approvals

- Tender for construction

- Establish construction activity timelines

Communication

A Communication Plan will identify the key communication requirements specific to the proposed Bindoon Mountain Bike and Adventure Park development and outlines who needs what information, when they need it and what form it will be provided in.

- Create a project control group

- Identify stakeholders

Control

Control of the project is important to ensure that the direction and desired objectives of the development progresses in an appropriate way and is directed by the relevant technical and experienced resources.

Mountain bike trail development is a rather specified field and the appointment of an experienced project manager who has an acute awareness of the mountain bike trail development industry, will provide enormous benefit to achieving desired objectives and to mitigate cost over runs and time delays.

Response

Response times are relevant at various stages throughout the life of a development such as the proposed Bindoon Mountain and Adventure Park and it is important to ensure that systems and procedures are in place that enable responses to be made accurately and in a timely fashion.

Audit

The audit process will need to bey conducted at various specific stages throughout the life of the development in the form of very particular updates and meetings.

This phase should be viewed as part of the process in delivering and managing the development to completion and a tool by which issues and opportunities are identified and acted upon.

Such issues as budget vs actual reviews and performance of contractor reviews will ensure that these various hold points will benefit the overall development product.

Section 19:

Mountain Bike Park
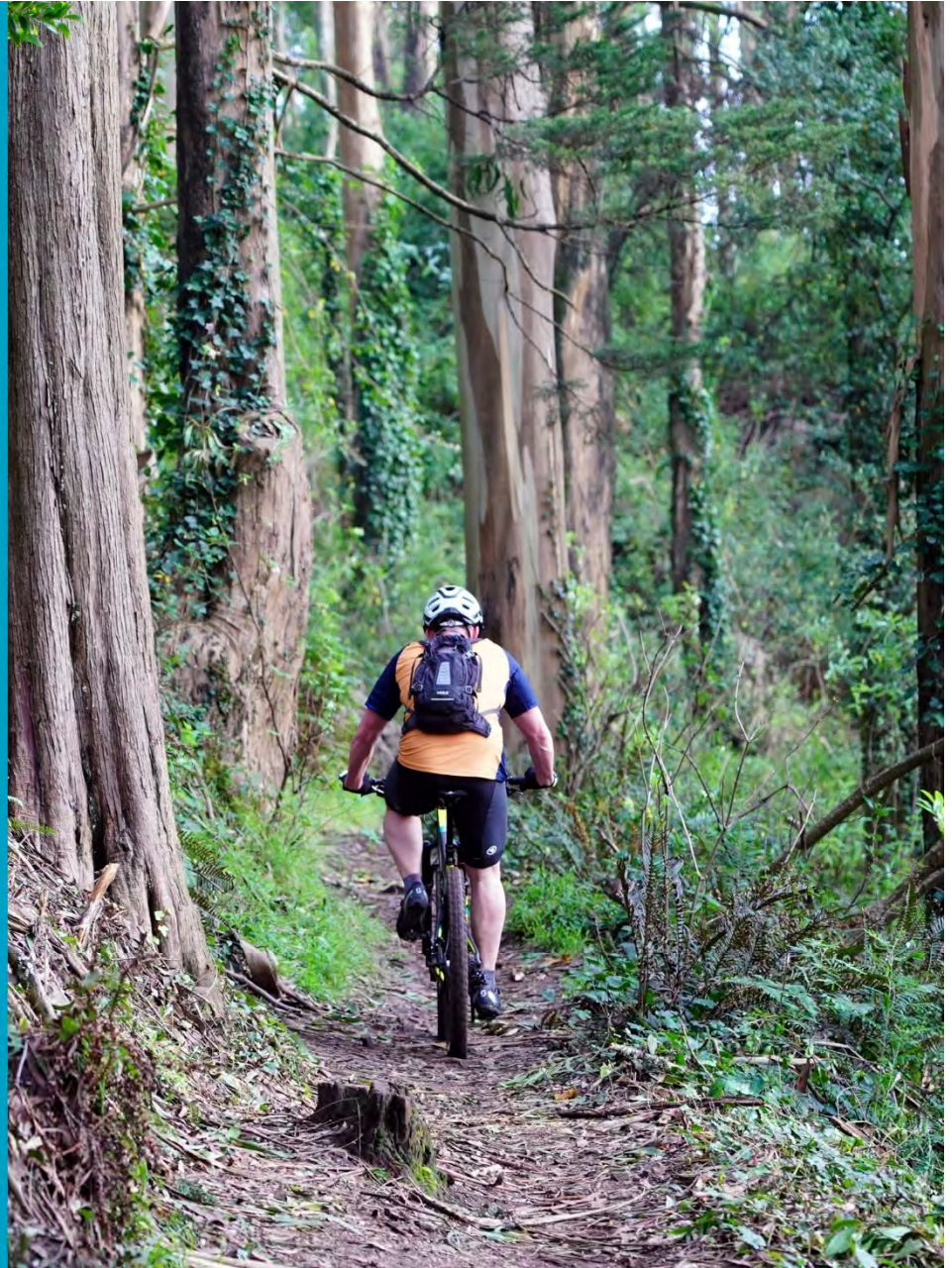
Management

19. Mountain Bike Park Management

Enablers of Success

Successful Business Models[64]

Profitable business models depend on developing qualities that help the business succeed: finding high-value customers; offering significant value to customers; and delivering significant margins.

Great business models also avoid three 'red lights' that can derail a business:

- Difficulties in satisfying customers;
- Trouble maintaining market position; and
- Problems generating funding for growth.

The following list outlines key factors in determining whether a business model meets each green light and avoids the red lights.

It is recommended management of Bindoon Mountain Bike and Adventure Park conducts a similar examination of the proposed business to see if the criteria for success is able to be met, more importantly, able to correct any weaknesses evident prior to operations and when operational.

Green Lights

1. Acquire high-value customers

High-value customers don't mean rich customers, but customers who meet the following requirements:

- Are easy to locate
- Allow you to charge a profitable price
- Are willing to try your product after minimal marketing expenses
- Can generate enough business to meet your sales and profit objectives

Customers don't necessarily need to be the end users of your product or service. They could be retailers, distributors, online booking channels or whomever you sell your product or service to. If your end users or distributors don't fit this profile, you can still meet this requirement by attracting high-value customers through partnerships or alliances with companies in the market.

2. Offer significant value to customers

There are a number of ways you can create significant value and competitive advantage, including the following:

- Unique advantages in features and benefits
- Better distribution through retail or distribution channels
- More complete customer solutions through alliances with other businesses and organisations
- Competitive pricing or pricing options
- Offer points of difference, broader product line or more

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[64] Successful Business Models, Entrepreneur Press 2006

flexible options

The internet, outsourcing and, most of all, the increased willingness of companies to partner in creative ways to serve customers has resulted in every industry creating innovation in business strategy. This gives you opportunities, but also makes it imperative that you stay on the creative edge to fend off competition.

3. **Deliver products or services with high margins**

As competitors will typically match your costs in the end, higher margins come from having a superior product or by having features that provide significant value or unique aspects that allow you to charge more. You can achieve high margins with other tactics, including the following:

- Use more efficient distribution channels

- Require less sales support and sales effort

- Have a lean industry-leading operational team

- Offer more auxiliary products or other opportunities for revenue without increasing cost

Red Lights

1. **Provide for customer satisfaction**

Consider whether it will be difficult, and therefore expensive, to satisfy customers once they buy. Some of the aspects of a business that create high customer satisfaction costs include:

- High insurance costs

- Extensive technical support

- Extensive implementation requirement

- Extensive customer service

- Interface problems with other equipment

Customer satisfaction costs, which occur after the sale, are red flags because the costs are typically high and don't produce revenue or profits. If your type of product might have high customer service costs, you need to configure your business to put these costs on someone else, either with partnerships or alliances or by restricting your sales to an aspect of the business that doesn't require customer satisfaction costs.

2. **Maintain market position**

A good business model uses its resources to improve its market position, adding new products, features and customers or expanding into new areas. The red flags that indicate it will be difficult to maintain market position include:

- Two or three major customers/market segments buy most of your product

- Major potential competitors control the distribution network

- Technology changes rapidly and requires high-risk product development

- There are alternative technologies being developed to meet the same need

- You have well-funded potential competitors who could quickly move into your market

Long term, your ability to hold market position is determined by the characteristics of the overall market. For example, a company involved in the telecommunications sector must adjust and guess right on constant changes in technology to hold market position. A risk of a wrong guess may result in negative impacts in the future.

3. Fund the business

Start-up costs, operating capital, personnel costs and overhead costs are just a small percentage of the funding requirements for any business. The question is whether the investments will have a high return and whether the business can grow without substantial new investments. Red flags for a business model regarding investments include:

- ROI is less than 25% in the first three years

- Incremental production of products or services requires substantial additional investments

- Fewer than 50% of the investment required will be used in revenue producing areas, such as sales and production

- Investments have to be made prior to sales commitments

- Industry as a whole has a poor ROI or poor profitability

Money is available for the right plan and the right model. You'll find money available if your ROI is right and if you have financial leverage, which means your initial investment will allow you to double or triple sales without requiring any more funding.

Delivery of Sporting Products and Services[65]

According to the Australian Sports Commission, in a rapidly changing environment sports in Australia need to adapt their products and services to remain relevant. The challenge is how best to evolve these whilst retaining those things that are special and unique to your sport. The goal is to develop and deliver relevant products and services supported by effective go-to-market strategies.

1. Do you have a suite of offerings that address all your participant needs, from children through to adults?

2. How do your participants transition from one stage to the next?

3. Do you develop products in order for them to be sustainable?

4. How are you servicing all your stakeholders?

Sustainable commercial success is unlikely if the above-mentioned factors are not addressed and in place. Sporting pursuits operate in a highly competitive market against a huge array of alternative leisure and entertainment products. Identifying appropriate commercial opportunities to help grow revenues in support of business goals is critical to success.

Recommendations:

1. **Know what your assets are and what they're worth**

2. **Understand your audience deeply**

3. **Know how best to leverage your assets**

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[65] Australian Sports Commission: Participation Game Plan, Tool Kit: Building Stronger Sports

Community Collaboration

Early collaboration with local residents and Shire of Chittering businesses, neighbours, Government authorities and industry organisations will be integral to the overall success of a new recreation and tourism attraction in Bindoon.

Establishing strong networks, partnerships and mutually beneficial products, services, agreements etc. will ensure you have the 'locals' onside should the time come for future advocacy for the development and/or enhancement of services and infrastructure within the property or externally in the region.

Industry Partnerships

There are unlimited opportunities for the establishment of partnerships prior to development and/or operation of a new business concept. This is also inclusive of memberships for additional industry insight, support and advocacy.

Industry partnerships in the mountain biking, cycling, outdoor recreation, tourism, business and education sectors will be of particular value.

Examples of these may include, but are not limited to:

- Industry association memberships, for example:
    - WestCycle / WA Mountain Bike Association
    - Mountain Bike Australia
    - International Mountain Biking Association
    - Outdoors WA
    - Tourism Council of WA
    - Australian Tourism Export Council
    - Destination Perth
- International mountain biking networks (competitions and events)
- Domestic and international inbound tour group operators
- Travel agents
- Leisure group operators
- Education and training providers
- Non-profit groups
- Corporate conference, activities and travel organisers (Perth Convention Bureau)
- Australian mountain biking, cycling, adventure activity supplier partnerships
- Visitor centres (e.g. WA Visitor Centre – Perth; Gingin Visitor Centre, Swan Valley Visitor Centre)
- Tourism WA and Destination Perth for collaborative marketing opportunities and industry/media familiarisation programs
- Vacation Care and Sports Group organisations e.g. YMCA, PCYC
- Local accommodation and hospitality providers

Sponsorship Partnerships

Sponsorship may be sought across a range of operational platforms and is a great way to work in partnership with key product and service links to your business. For example:

- *Fencing supplied/branded by **Fox Racing MTB***

- *TV Screens supplied/branded by **Cyclemania***

- *Website sponsored/branded by **Shimano***

- *Stage and background set for competition/events presentation pics and media / branded by **Red Bull***

Naming rights to key aspects of your business may also provide an additional revenue source e.g. 'Red Bull Black Trail Run', or 'Cyclemania MTB' retail outlet (derived from 'Cyclemania' specialist retailer in North Perth - opportunities for retail and online sales consignment agreements).

Additionally, sponsorship must be a two-way street and there is no better way to gather the support of your local community or key target youth groups, for example, than with sponsorship activities. Examples may include day passes, or memberships as prizes for community fund-raising, schools etc.

Government Roles and Responsibilities

An important collaboration for a unique business concept is your local, regional, State and Federal government agencies. Strong foundations and open lines of communication across all levels of government, in the planning phase of your project (and beyond) must be nurtured and developed to ensure approval and support is provided at all stages.

As many government representatives may be on the 'conservative' side when making decisions based on untried and untested business concepts, a slow and steady approach, backed with strong evidence, research, statistical data

and letters of support (do not rely on anecdotal evidence alone), may provide government with the confidence to make important decisions which may have a positive impact on a project such as funding, licensing, marketing etc.

Licensing, Registrations and Regulations

Business Licence Reports[66]

Breakaway Tourism has obtained two 'Business Licence Reports' for two types of prospective business types in the Shire of Chittering, Western Australia through the Small Business Development Corporation.

- 'Mountain Bike Club'; or

- 'Outdoor Adventure Operation n.e.c'

Note: Above selections were the most appropriate classifications available

Drawing from a database of over 6,000 Local, State and Federal Government licences these Business Licence Reports have been tailored according to the information provided. The reports include licences from a range of different agencies - each responsible for a different aspect of the business.

Disclaimer: Information and data provided to the public by the Small Business Development Corporation is supplied in good faith and entirely at the risk of the recipient. No warranty is given as to the correctness of this information and it is provided on condition that neither the Small Business Development Corporation nor any of its officers shall be liable to any person for any loss or injury sustained using it.

A combined list of licences, registrations and permits recommended in both

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[66] Business Licence Reports, Small Business Development Commission, June 2019

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Small Business Development Commission reports have been outlined in the table below.

Licences, Registrations and Permits

- Approval for Camping on Private or Unapproved Land (Shire of Chittering)
- Approval to Erect a Commercial Advertising Sign on a Road or Highway
- Approval to Use Containers Other than a Receptacle (Shire of Chittering)
- Australian Business Number Registration
- Building Approval Certificate (Shire of Chittering)
- Building Permit (Shire of Chittering)
- Disposal Licence
- Employer Requirements - Superannuation Guarantee
- Exemption for a Relevant Transaction
- General Business Music Licence
- Goods and Services Tax (GST) Registration
- Incorporation of an Association
- Land Tax
- Licence to Play Music at a Sporting Event
- Licence to Play Music in Recreation and Leisure Centres
- Licence to Play Music in the Workplace
- Licence to Play Music on Hold
- Licence to Play Sound Recordings or Music Videos
- National Business Name Registration
- National Police Clearance
- Occupancy Permit (Shire of Chittering)
- Pay-Roll Tax Registration

Licences, Registrations and Permits

- Permit to Interfere with Vegetation on Local Government Property (Shire of Chittering)
- Registration as a Foreign Company
- Registration as a PAYG Withholder
- Registration as an Australian Company
- Registration of Working Holiday Maker Employment
- Sign Licence (Shire of Chittering)
- TFN Application / Enquiry - Company
- Vehicle Licence
- WA Driver's Licence
- Workers' Compensation Insurance
- Working with Children Check

Table 31: Licenses Registrations and Permits

Additional compliance and standards to note may include, but are not limited to the following:

- **Australian Tourism Accreditation Program**

- **Australian Adventure Activity Standards** – Good Practice Guides

  - Standard (Australian Adventure Activity Standard)

  - Cycling, Cycle Touring and Mountain Biking

  - Abseil & Climbing

  - Bushwalking

  - Camping

- o Challenge Courses (ropes courses, low ropes & adventure games)

- o Climbing/Climbing on Artificial Surfaces (abseiling and climbing)

- o Ropes Courses (high and low ropes challenge courses)

See Attachment 5: Cycling and Mountain Biking Activity Standard

- **National Outdoor Leader Registration Scheme** (NORLS)

  - o Mountain Biking

  - o Abseiling (natural and artificial)

  - o Bushwalking

  - o Challenge Ropes Courses (high and low)

  - o Climbing (natural and artificial)

  - o Cycle Touring On-Road

- **Mountain Bike Australia Coaching**

  - o Level O MTB Skills Instructor

  - o Level 1 MTB Skills Instructor

  - o UCI Level 2 MTB Coach

Operational Management Models

The following table provides an overview of the various options for development and ongoing operational management of the proposed development.

Operational / Management Models		
Option	Model	Key Points
1.	**Single Ownership and Management for Shire of Chittering** Sole ownership of development, operation and responsibility for all aspects of the business.	• Full control • High investment • High risk • Full revenue
2.	**Co-investors for developmental and/or operational partnerships** Shared investment, additional activities/attractions; shared ownership, shared control etc. for some or all aspects of the business.	• Loss of control • Access to more capital investment • Shared responsibilities and revenue
3.	**Shire of Chittering owned and leased to a private operator** Sole investment, development and responsibility by Shire of Chittering and would lease the development/facility 'under management' to an experienced private operator underset with terms and conditions.	• Lease provides steady income • Profit margins reduced • Risk of poor management with a major investment
4.	**Privately owned and leased to a non-profit operator e.g. YMCA** Shire of Chittering sole investment, development and responsibility and	• Lease provides steady income • Enhanced access to grants and funding

Operational / Management Models		
Option	**Model**	**Key Points**
	would lease the development/facility 'under management' to an experienced non-profit operator underset terms and conditions.	• Profit margins reduced • Risk of poor management with a major investment

Table 32: Operational / management models

Section 20:

Employment & Human Resources
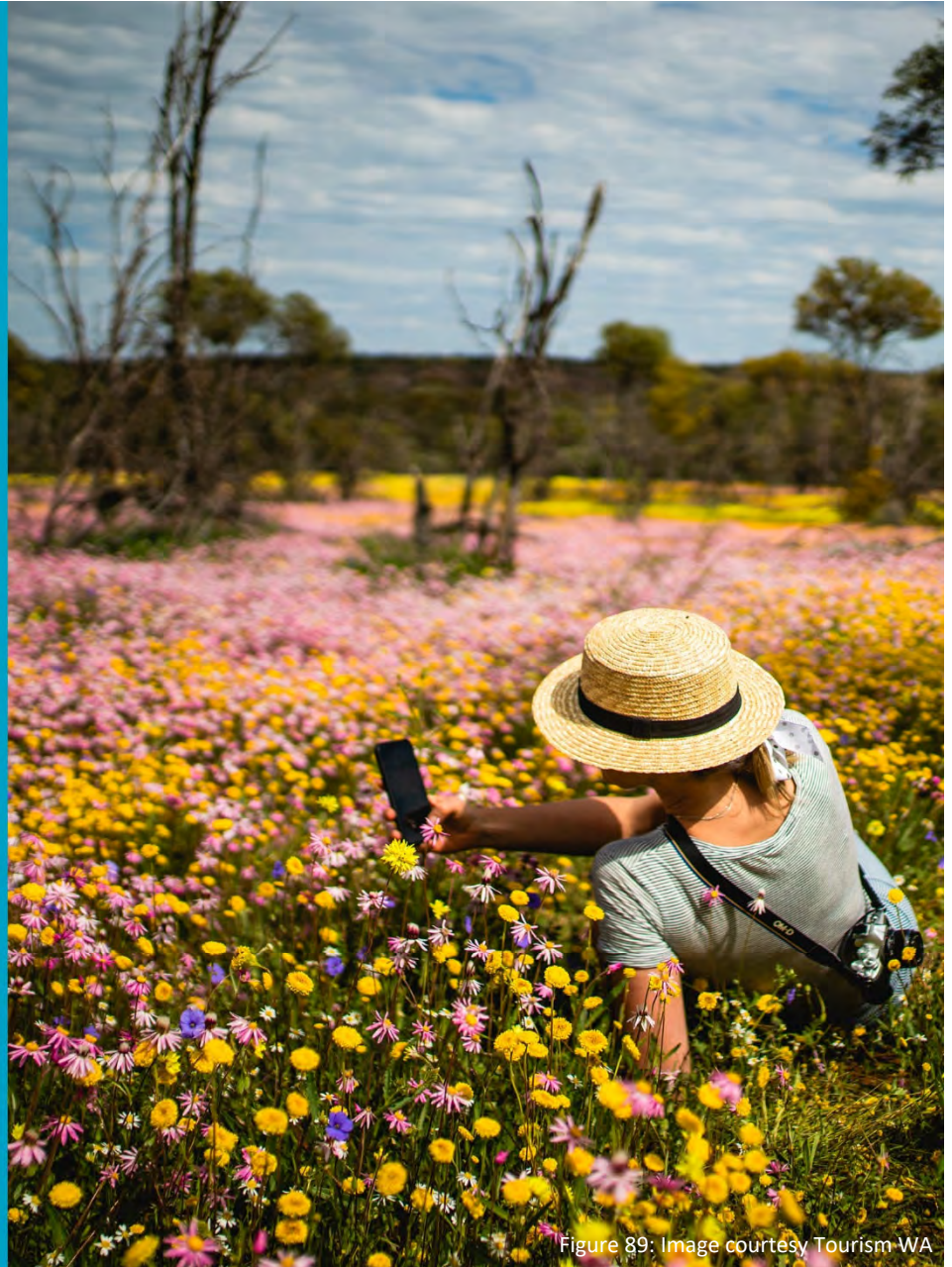
20. Employment & Human Resources

Labour requirements

In addition to the standard human resources required for a recreation-based facility, and the general operations of administration, accounts, human resource management, sales and marketing, maintenance, cleaning etc. some specialist staff may be required (as employees or from external partners and suppliers).

It is important to note that the Shire of Chittering does not have industry expertise in the fields of mountain biking, outdoor recreation and tourism attraction management (and the human resources required), therefore the option to lease the Bindoon Mountain Bike and Adventure Park to a suitably qualified operator may be a highly desirable option. Alternatively, the recruitment of highly experienced personnel to develop and grow the business is another option for consideration.

ANZSCO Codes for Outdoor Recreation[67]

Occupation Code 452215: Outdoor Adventure Instructor

Alternative title: Outdoor adventure leader

Specialisations:

- Abseiling instructor
- Adventure challenge instructor
- Hang-gliding instructor
- Outdoor education teacher
- Outdoor pursuits instructor
- Paragliding instructor
- Rock climbing instructor

Occupation Code 452216: Trekking Guide

Alternative title

- Bushwalking guide

Occupation Code 452299: Outdoor Adventure Guides N.E.C.

Specialisations

- Caving guide
- Cycle touring guide
- Horse trekking guide
- Sea kayaking guide
- Skydiving instructor

Table 33: ANZSCO Codes for Outdoor Recreation

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[67] ANZSCO - Australian and New Zealand Standard Classification of Occupations, ABS

New Job Roles for a Mountain Bike and Adventure Attraction

Outdoor recreation, hospitality and tourism job skills are highly transferrable.

Multi-skilling employees with these transferrable skills across the operation may be an opportunity to provide full-time and/or part-time job roles for staff members, thus enhancing the retention strategy and capabilities of the business.

Mountain biking and adventure sports industry skills, knowledge and experience however is a major skills gap for the existing workforce in the Shire of Chittering and this expertise will need to be brought into the business, particularly in the first two years of development and operation.

Key occupations include:	Method of recruitment:
Mountain Biking Instructors, Coaches and Guides **Outdoor Recreation Instructors and Guides**	• Explore local options • WA mountain bike industry networks e.g. WestCycle • Explore existing WA and east coast workers • International/Interstate staff exchange programs • Experienced backpackers on a holiday visa
Mountain Bike / Cycle Equipment Technician	• Explore local options • WA mountain bike industry networks e.g. WestCycle • Explore existing WA and east coast workers • International/Interstate staff exchange programs • Experienced backpackers on a

Key occupations include:	Method of recruitment:
	holiday visa

Other job roles as the business grows, may include (may be absorbed into other roles / management for multi-tasking):

- Business Development Manager
- Online Marketing Officer (social media and website management)
- Reservations – Group Bookings Officer
- Administration / Customer Service Officer
- Events Coordinator
- Retail Sales Consultant
- Accounts / Payroll Officer
- Shuttle Bus Driver
- Operations Manager

Table 34: Key occupations

A recruitment and retention strategy to attract and retain high quality employees must include a dedicated workforce development plan with an emphasis on leadership, teamwork, training, professional development and succession planning for future business growth and sustainability.

Multi-skilled Workforce[68]

The 2013 National Outdoor Sector Survey found the workforce needs to be multi-skilled. The industry suggests outdoor leaders need experience or qualifications in an average of five areas to gain full time employment.

This has been attributed to two factors:

1. Participants in outdoor recreation increasingly looking for an 'experience' and expect this to involve more than one activity.

2. Employment in the sector generally being casual and seasonal. To get year-round employment, workers need skills suited to different seasons (e.g. adventure park instructor in Perth for Summer, whale shark diving guide in Exmouth for Winter).

To help graduates find full time employment their training needs to recognise this need for multiple skills. It also needs to be available in ways that make it easy for those already in the sector to top up their skills.

Skills Opportunities and Concerns

There are concerns that changes in funding for outdoor recreation, in Victoria and South Australia particularly will reduce the number of outdoor recreation graduates at a national level, despite the skills and labour shortages in the sector.

There are opportunities in the sector for workers with skills in:

- Facilitation;
- Communication;

- Relationship management; and
- Business management

There is a shortage of outdoor leaders, which has led to some organisations linking with training organisations overseas to find graduates and increase their pool of candidates.

It is expected that outdoor education leaders with the skills to assist with the educational needs of school groups will find themselves in demand in Australia.

Outdoor Recreation Occupations in Demand[69]

National and State Skill Shortages			
ANZSCO Code	Occupation	Training Package Qualification	Justification/Evidence
Skill Shortage Occupation (Australia)			
4522	**Outdoor Leaders (Outdoor Adventure Guide)**	Leaders under supervision: Certificate III in Outdoor Recreation Independent leaders: Certificate IV in Outdoor Recreation	The sector reports difficulty recruiting qualified outdoor adventure leaders, particularly following a continuing reduction in the provision of these courses nationally.
Skill Shortage Occupation (Western Australia)			

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68 Service Skills Australia, Environmental Scan – Sport, Fitness and Recreation 2015

69 Service Skills Australia, Environmental Scan – Sport, Fitness and Recreation 2015

| 452215 | **Outdoor adventure instructor** | Leaders under supervision: Certificate III in Outdoor Recreation

Independent leaders: Certificate IV in Outdoor Recreation | The sector reports difficulty recruiting qualified outdoor adventure leaders, particularly following a continuing reduction in the provision of these courses nationally. |

Table 35: Outdoor recreation occupations in demand

Common Employee Benefits within the Recreation Industry[70]

The most common employee benefits received within the recreation industry are, in order:

1. Mobile Phone 43%

2. iPad/Laptop 30%

3. Flexible Hours 28%
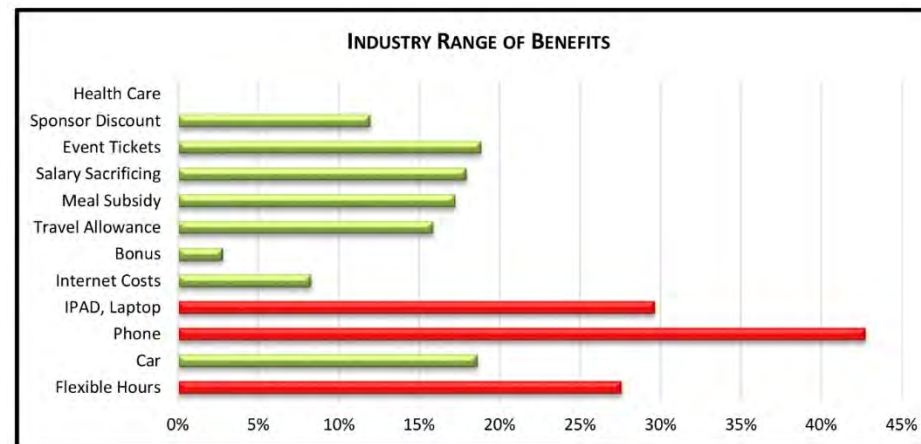
Figure 90: Common recreation industry employee benefits

Industry Wage Review

Industry Awards and Wages - Modern Awards

The minimum wages and conditions an employee is entitled to are set out in national Awards (also known as Modern Awards). Awards do not apply when a business has an enterprise agreement or other registered agreement and the employee is covered by *it (enterprise or registered agreement must comply with the Australian Fair Work Act legislation)*

Awards apply to employees depending on the industry they work in or the job that they do. Examples of modern industry awards across the recreation and hospitality sectors that may be applicable to a mountain bike and adventure park attraction include:

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[70] Apex Human Resources, Sport & Recreation Remuneration & Benefits Report 2014

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- Amusements, Events and Recreation Award 2010

- Clerks Private Sector Award 2010

- Fast Food Industry Award 2010

- Food, Beverage and Tobacco Manufacturing Award 2010

- Hospitality Industry (General) Award 2010

- Passenger Vehicle Transportation Award 2010

- Registered and Licensed Clubs Award 2010

- Restaurant Industry Award 2010

- Sporting Organisations Award 2010

- Fitness Industry Award 2010

- Modern Enterprise Agreement

Note: This list does not include Awards applicable to employees of a Local Government Authority.

View or download Awards at www.fairwork.gov.au/awards-and-agreements/awards

Recreation Industry Remuneration Levels[71]

Summary of Remuneration Levels of Common Functions within the Sport and Recreation Industry in Western Australia is provided in the following table.

FUNCTION	Salary Range ($k per anum)											
	<50	50-60	60-70	70-80	80-90	90-100	100-120	120-140	140-160	160-180	180-200	200+
CEO	6.5%	0.0%	6.5%	6.5%	6.5%	19.4%	22.6%	12.9%	6.5%	6.5%	3.2%	3.2%
COO/General Management	6.7%	0.0%	0.0%	6.7%	0.0%	13.3%	6.7%	11.1%	26.7%	0.0%	0.0%	6.7%
Finance Manager	0.0%	14.3%	14.3%	14.3%	14.2%	28.6%	0.0%	14.3%	0.0%			
Operations Manager	0.0%	31.3%	12.5%	25.0%	18.8%	6.3%	0.0%	0.0%	6.3%			
Development Manager	3.0%	12.1%	24.2%	39.4%	18.2%	0.0%	0.0%	0.0%	3.0%			
Marketing Manager	5.9%	17.6%	17.6%	47.1%	5.9%	0.0%	0.0%	0.0%	5.9%			
Misc. Dept. Management	0.0%	16.7%	5.6%	44.4%	11.1%	22.2%	0.0%	0.0%	0.0%			
Competitions Manager	14.3%	28.6%	7.2%	21.4%	14.3%	0.0%	14.3%	0.0%	0.0%			
High Performance Management	8.7%	21.7%	26.1%	4.3%	30.4%	4.3%	0.0%	0.0%	4.3%			
Finance Officer	20.0%	40.0%	40.0%	0.0%	0.0%							
Development Officer	21.2%	69.7%	9.1%	0.0%	0.0%							
Operations Coordinator	25.6%	65.1%	7.0%	2.3%	0.0%							
Marketing Coordinator	43.8%	31.3%	25.0%	0.0%	0.0%							
High Performance Coordination	28.6%	50.0%	21.4%	0.0%	0.0%							
Finance Administrator	36.4%	27.3%	36.4%	0.0%	0.0%							
Operations Admin.	73.5%	17.6%	2.9%	0.0%	5.9%							

Table 41 – Industry Remuneration Common Functions

The cells highlighted in red represent the average (median) remuneration levels.

Figure 91: Recreation industry remuneration levels

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[71] Apex Human Resources, Sport & Recreation Remuneration & Benefits Report 2014

Section 21:

Brand and Marketing

21. Brand and Marketing

By undertaking this feasibility for the proposed Bindoon Mountain Bike and Adventure Park development, the Shire of Chittering is in a unique position to take advantage of utilising the region's natural assets and topography to deliver a product relevant to an industry which has a strong market segment and is in a well-publicised growth phase.

The natural asset and topography of the subject site is largely based around the following attributes:

1. A well graded escarpment, proximal to all town services

2. Easily accessed location via main and direct traffic routes

3. A solid framework of existing town infrastructure and availability of services

As has been identified in the design concept section of this document, the large variety of research, guidelines and general mountain bike industry data provides a tremendous opportunity to produce the most market relevant product for the core market segment, but also look at synergies between other known and potential user groups, all aimed at increasing visitation and extending usage periods through times of the year that are typically soft in terms of visitation.

All of the above-mentioned initiatives and principles do not necessarily translate into the desired or forecast usage numbers unless there is a carefully planned marketing strategy (and associated budget) to support the development outcome.

There are a number of approaches to rolling out a marketing strategy, the following is a broad overview of what could be considered for the proposed Bindoon Mountain Bike and Adventure Park development.

Brand and Marketing Roll Out

Brand Development

Commence a brand and corporate identity with the development of a logo.

- Engage a local graphic and brand designer of your choice

From there the corporate image, style, font and colours, website, brochures, business cards, social media pages etc. can then be further developed originating from the new logo, it's colours and style, so the brand demonstrates ongoing consistency and quality.

Sample logos have been provided for display purposes only.

See over page

Figure 92: Logo concepts

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Website Development

A large portion of the target markets can be accessed with a quality, functional website that will enable better brand awareness, search engine optimisation, occupancy and revenue over time.

It is important to ensure a new website offers ease of consumer navigation; high quality information; imagery; video; attractions; activities; online booking capability; accreditation logos; review site testimonials (e.g. trip advisor); social media widgets; be viewable across a range of devices; and promotes points of difference.

Critical Website Development Elements

1. Visibility and findability
2. Visual design and content
3. Functionality and accessibility
4. Technology
5. Online bookable content
6. Customer engagement

Seek Industry Accreditations and Memberships

This adds another layer of confidence to the consumer that the development has the recognition, level of management, and operational procedures that achieve and/or exceed industry standards.

Once the relevant accreditations and memberships have been obtained, these logos (where appropriate) can be publicly displayed and incorporated in all marketing activities e.g. business cards, brochures, website, social media profiles, signage, advertisements, directory listings etc.

Identify Target Markets

Identify and strategically target all local, intrastate, interstate and international markets across all proposed products and services including key organisational sectors such as schools, sporting clubs, community groups, corporate groups and special interest groups etc.

Partner and collaborate with key industry associations and government agencies for joint marketing efforts to enhance consumer reach and impact.

Develop a Database

Develop a customer database into various segments for ongoing updates, business development and marketing activities e.g. key stakeholders, future customers, corporate and group clients, tour and travel agents and wholesalers, industry networks etc.

Export any existing databases (e.g. from the Proposed Bindoon Mountain Bike Park Survey key stakeholders contacts list developed as part of this Feasibility Study), and amalgamate into a spreadsheet or dedicated Customer Relationship Management (CRM) program *preferred*

CRM: *Customer relationship management is an approach to manage a company's interaction with current and potential customers. It uses data analysis about customers' history with a company to improve business relationships with customers, specifically focusing on customer retention and ultimately driving sales growth.*

A dedicated database will be a highly valuable marketing tool that can be exported into a range of applications for ongoing consumer engagement for example, Email Direct Marketing (EDM) campaigns for regular eNews updates

with online booking calls to action for visitation, events, add on products etc.

Traditional Marketing Methods

Examples for consideration include:

- Advertisement in magazines, newspapers
- Attend business networking events
- Brochure
- Brochure Price/Tariff List
- Business Cards
- Conduct sales calls
- Sales kit for distribution
- Participate in tourism trade events e.g. Australian Tourism Exchange (ATE)
- Participate in tourism consumer events
- Participation in sport and recreation events / competitions
- Portable Banner / Sign
- Radio commercial
- TV commercial

Digital Marketing Methods

Examples for consideration:

- Website
- Email direct marketing (EDM)

- SMS marketing
- SMS reservation and check in messages
- Lead generation
- Digital remarketing
- Search engine optimisation
- Online survey
- Online newsletter
- Hashtag campaigns
- Online booking sales
- Third party online travel agent sales e.g. Expedia.com
- Online directory listings
- Mobile device applications (Apps)
- Online ads and commercials e.g. You Tube, websites, social media channels, industry sector sites

Section 22:

Risk Management

22. Risk Management

Risk Management Audit and Analysis

A preliminary Risk Management Audit and Analysis has been undertaken to assess prospective risks associated with the development of a mountain bike and adventure park attraction in Bindoon. Contents of the risk management audit and analysis are not exhaustive, however may be used as a guideline to risk management planning.

Risk Management Audit and Analysis – Proposed Bindoon Mountain Bike and Adventure Park		
Issue	**Risk**	**Mitigation Strategy**
Access to grants	Certain entity types company may be ineligible to receive most grants opportunities	- Develop partnerships with non-profit organisations for outdoor recreation, education and community programs that may provide access to grants and increase patronage/product awareness
Access to funding	Development costs are considered too high for risk/ROI comparisons	- Seek to access grants - Stage the development to reduce ROI risks
Access to road signage	Road signage at key arterial roads not approved	- Work in partnership/gain with relevant agencies and gain support for advocacy to install critical roadside and directional signage to the attraction
Access to skilled labour	Labour and skill shortages for the outdoor recreation and tourism sectors High staff turnover – loss of in-house skills and knowledge Poor staff performance affecting company brand/consumer sentiment	- Dedicated recruitment and retention strategy inclusive of ongoing training and professional development - Provide work experience, traineeship/apprenticeship opportunities to attract and develop new staff members - Participate in staff exchange program and/or off-season recruitment from Australian or International operators
Booking cancellation	Weak (or no) cancellation policy exposes business to loss of revenue	- Dedicated cancellation policies for individual and group booking processes to protect the business and the consumer
Boundary fencing	No adequate fencing may result in unauthorised use of the trails by mountain bikers, motor bike etc	- Cost out standard pvc coated fencing to be incorporated into design
Brand awareness	Mountain Bike branding in Western Australia is only in its infancy	- Brand education campaign

Risk Management Audit and Analysis – Proposed Bindoon Mountain Bike and Adventure Park

Issue	Risk	Mitigation Strategy
		- Strong marketing strategy incorporating online communities and social media campaigns - Partnerships with existing operators and product/service suppliers in Western Australia, interstate, international
Bushland property risks	Risk of snake, spider, insect or wildlife bites; pest plagues; fallen trees	- Emergency management plan - Tree management plan - Preventative maintenance plan - Qualified first aid staff - Access to local medical services after hours / weekends
Climate seasonality	Mountain biking may be viewed traditionally as a Winter, Spring and Autumn activity	- Summer months may need activities to offset image of hot, dry regional WA location - Marketing / imagery strategy for year-round appeal - Summer events campaign, reticulated track
Competition of other sport, leisure and entertainment activities	Susceptible to reduction in patronage due to organised sports, leisure or entertainment activities e.g. AFL or netball season, fun runs, events and festivals	- Development of mountain biking culture in WA - Provision of club, tuition, membership and group training programs - Implementation of regular events and competitions calendar - Implementation of season passes to secure visitation revenue
Compliance	Non-compliance with Department of Education and Training (DET) Guidelines for Outdoor Pursuits; Australian Adventure Activity Standards or other relevant standards	- Compliance reviews and audits - Documented policies and procedures - Management training - Maintain relevant industry accreditations
Cost of insurance and insurance claims	Insurance costs are prohibitive to operation	- Engage an experienced insurance broker - Ensure all relevant insurances and public liability is covered for the business to prevent underinsurance
Cost of trail maintenance	Maintenance cost over runs	- Ensure initial maintenance costings are relevant to maintain the benchmark trail / facility conditions at all times
Development costs exceed budget	Cost blow out may prevent completion of core operational facilities, equipment and running costs	- Conduct detailed costing study incorporating quotations, costing models, access to finance etc.

Risk Management Audit and Analysis – Proposed Bindoon Mountain Bike and Adventure Park

Issue	Risk	Mitigation Strategy
		- Project management and planning to be conducted and controlled in partnership with professional advisers, suppliers and service providers
Economic changes	Downturn of economic environment reduces the disposable income of Western Australians / Australians e.g. interest rates	- Market attraction to young adults who may not be influenced by discretionary spend
Emergency management	Natural disaster, fire, explosion, gas leak etc	- Emergency management plan - Staff induction process / policies and procedures - Emergency muster points
Environmental management	Potential harm to natural environment, disturbance of local wildlife, energy consumption and impact on natural water resources	- Environmental management plan - Tree management policy - Customer education strategy e.g. signage, business ethos - Innovative energy solutions e.g. solar power, water recycling, waste management/recycling, buy local (reduce carbon emissions) etc.
Incident management	Risk of poor emergency response; Litigation; Loss of licence/registration/accreditation; or Negative consumer sentiment following a lack of incident management processes and capability	- Emergency response and incident reporting processes - Qualified first aid personnel - Well-equipped first aid room away from public eyes to minimise public exposure (collateral damage); and to maximise attention/focus on injured customers - Access to medical / emergency services 7 days per week
Industrial relations disputes	Non-compliance with the Fair Work Act or industrial awards may result in litigation and or back-pay owing to employees	- Human resource management plan - In-house (or outsourced) industrial relations advice e.g. Fair Work Act; Award Wages etc.
Key product and service supplier/s	Loss of key product and service supplier/s	- Key product and service suppliers documented and available to all personnel in the event of management absence - Identify backups for all critical products and services e.g. power, water, electricity etc.
Lack of demand	Low attendance – reduced anticipated revenue; lack of ambience at attraction with low visitor numbers	- Drive consumer awareness, education and demand for an exclusive recreation experience

Risk Management Audit and Analysis – Proposed Bindoon Mountain Bike and Adventure Park		
Issue	**Risk**	**Mitigation Strategy**
		- Gain exposure and engagement through the existing mountain biking, outdoor recreation and adventure tourism market in Western Australia through e.g. collaborative partnerships and industry retailers - Create an exciting vibe and inclusivity for participants and spectators
Lack of in-house mountain biking knowledge and experience	Unable to demonstrate strong mountain biking skills or deliver tuition with current employee cohort	- Recruitment of experienced personnel - Dedicated industry program for new and existing staff - Participate in staff exchange program and/or off-season recruitment from Australian and international operators.
Land Acquisition Fails	Agreement unable to be made with landowners	- Access another independent valuation to secure a more agreeable price point
Licensing and registration	Project development delays; fines; or business shut down due to unregistered / unlicensed aspects of the business	- Conduct full review of licences, registrations and codes of practice applicable to a mountain biking attraction (or similar) *include those of personnel e.g. bus driver's licence, working with children check etc. (e.g. hire or induction process) - Work in partnership with local authorities across all phases of planning, development and operation
Limited amount of tourist accommodation currently available in Bindoon	Visitors are discouraged to drive to Bindoon without the option of overnight stays	- Shire to consider new or alternate forms of affordable accommodation in Bindoon within close proximity to the attraction
Local industry engagement	Risk of a lack of stakeholder interest / engagement for collaborative marketing and packaging opportunities in Chittering region	- Enhance/develop networks and partnerships through local businesses; community members; and regional tourism destination marketing organisations - Encourage buy-in through mutually benefitting activities e.g. buy local policy; retail sale of local goods and services; accommodation agreements
Maintaining intellectual property for a unique business concept	Critical intellectual property is stolen / duplicated by a competing entity or previous employee	- Employment agreements with confidentiality clauses for all members of staff - Computer network password protection for various levels of employee e.g. administration versus management personnel - Exclusivity agreements with key service providers

Risk Management Audit and Analysis – Proposed Bindoon Mountain Bike and Adventure Park

Issue	Risk	Mitigation Strategy
Maintenance of trails	Maintenance of trails is not to standard and risks rider safety, environmental impacts and general poor consumer sentiment	- Seek to engage knowledgeable personnel with industry benchmark skills to maintain trail network - Offer regular training for interested personnel to upskill to desired competency levels
Manual bookings management system	Booking system not centralised and computorised	- Implementation of integrated online bookings management system with back up service (e.g. cloud-based) - Consideration of full venue management IT system to streamline bookings management, consumer relationship / database management, online bookings, channel management, website linked, human resource management, accounts system, reporting system etc.
Natural disasters – weather	Flood or bushfire eliminating long periods of operation/revenue, with longer term impacts; Substantial destruction of the business' assets and Equipment; Long term impacts of climate change, altering the ambiance and attractiveness of a tourist location (e.g. ongoing water restrictions)	- Emergency management plan - Environmental management plan - Crisis response strategy - Design concept
Neighbouring properties	Complaints, opposition or negative impact of disgruntled neighbours	- Ensure neighbouring properties have a full understanding of project plans prior to investment. - Pre-determine key areas of potential opposition to project with early solutions e.g. noise management plan, traffic management plan, environmental management plan, waste management plan, benefits to local economy, prospective partnerships e.g. goods, services, jobs, VIP memberships etc.
No interesting activities for non-biking participants	Spectators are not engaged therefore do not consider regular visits to the attraction, minimising attendance, revenue and local economic impact	- Provide interesting sights, sounds and activities for spectators e.g. food and beverage, viewing platforms, video screens, comfortable seating, positive staff interaction, interesting theming, retail experience; other activities; and add-on sales
OH&S management	Risk of major health and or safety issue with the design or management of the attraction	- Adequate trail difficulties for all skill levels - Access to helmet hire (and potentially wrist guards) - Policies and Procedures

Risk Management Audit and Analysis – Proposed Bindoon Mountain Bike and Adventure Park		
Issue	**Risk**	**Mitigation Strategy**
		- Equipment - First Aid Capability - Accreditation/Licensing/Registrations - Signage within the attraction to educate customers
Planning costs	Significant investment and risk (for no immediate return) for planning, developing and operating a new business concept	- Professional financial management and modelling assistance - Accurate project management planning to ensure no delays or sunk costs are incurred throughout the planning and development phase
Property infrastructure	Sewerage, power or water service blow outs stop or inhibit quality business operations resulting in lost revenue or consumer sentiment	- Ensure capability of existing or new infrastructure is planned for and budgeted for long term solutions - Develop scheduled maintenance program and select fast response supplier and service providers
Public Transport	No frequent public transport available	- Consider shuttle pick up from other central points closer to Perth - Local resident/tours/transport operator to develop new bus service business or contractor services - Engage existing transport services from Perth operating in the area e.g. Integrity Coach Lines' Perth-Midland-New Norcia route
Regional location	Major population base in Perth located on average 1 hrs drive from Bindoon;	- Marketing strategy to include alignments with region - Strong partnerships with tour and transport operators - Strong partnerships with local accommodation providers - Convenient online booking service attached to website for session tickets, tuition, equipment hire, memberships, VIP passes, gift vouchers etc.
Retaining unique product market position	Loss of exclusivity; Loss of business revenue; Diluted share of industry partners; Lack of patrons making running costs unsustainable	- Retain uniqueness and gain leverage with diversification of product - Enable strong retention of clientele through delivery of high quality services and facilities; and provision of excellent customer engagement - Strong, cost-efficient and engaging marketing strategy - Diversification of target markets for year-round occupancy
Rise in fuel costs	The cost of fuel may impact on visitation by target markets located over 30 minutes away e.g. schools, Perth consumers etc.	- Ensure marketing strategy and repeat visitation is achieved across a strong mix of geographic clientele with particular focus on the growing population of the northern metropolitan suburbs

Risk Management Audit and Analysis – Proposed Bindoon Mountain Bike and Adventure Park

Issue	Risk	Mitigation Strategy
Running costs	E.g. Staff wages, equipment, repairs and maintenance, utilities, general operations, insurance etc.	- Integrated accounts management software - Knowledge of Fair Work Act and Award Wages - Managers have strong business and financial management skills
Security of customer belongings	Regional location may require bags for personal belongings of customers – risk of theft or loss of personal property	- Carpark design to include security measures - Provision of locker hire to protect customer property and valuables
Mountain biking not attractive to every person, or physical capability	Loss of access to specific members of the public e.g. young children, retirees, people with impaired physical capabilities or a disability	- Provide a range of activities to satisfy all market demographics and abilities to encourage support crew visitation, not just rider visitation - Strategic marketing efforts and programs e.g. grandparent appeal, Little Kids club events and programs - Adaptive mountain biking and cycling capacity within trails design - Accessible amenities for families, prams, disabled access e.g. car parking, toilets/showers, pathways
Mountain biking / adventure activities health and safety	Mountain biking and outdoor adventure activities involve health and safety risks associated with high impact physical activities (staff and customers)	- Strong understanding of duty-of-care amongst management and employees - OH&S management plan - Emergency management plan - Incident management processes in place - Relevant insurances in place
Tourism attractions in the Chittering Region	Lack of major tourist attractions in the Chittering Region to draw market awareness; Lack of established organised tours and transport product frequenting the local area	- Gain maximum media and marketing exposure for a unique tourism attraction in WA/Australia - Regional destination marketing collaborative opportunities - Partnerships with high yielding tour operators (strong domestic and international marketing / consumer presence)
Value of Australian Dollar	Devalued Australian dollar may impact on international visitors to Australia	- Diversify partnerships with tour and transport operators to include mix of international and domestic tourist groups
General waste management	Site and surrounding areas may be prone to general rubbish and waste	- Educate visitors to care for the location and provide adequate number of waste disposal points

Risk Management Audit and Analysis – Proposed Bindoon Mountain Bike and Adventure Park		
Issue	**Risk**	**Mitigation Strategy**
WIFI / internet access failure	Unable to accept or process online bookings, enquiries, eftpos machine payments and online customer relations	- Emergency response plan - Backup access to online services - Daily hard copy print outs of incoming clientele, events, critical information

Participation Waivers

Participation Waivers are a necessary form of Risk Management for any adventure tourism or recreational activity business operator in Australia.

Some waivers may be in the form of a hard copy document for signing prior to entry; via an electronic tablet device upon entry; or online versions with electronic signatures for online booking / ticketing systems.

An example of a 'Risk Acknowledgment and Waiver' by Trees Adventure – Yanchep has been provided as an Attachment.

See Attachment 8: Waiver Example

Risk Management Policies and Statements

Risk Management Statement of Department of Sport & Rec Camps[72]

'Our camps take a proactive approach to managing risks involved in participating in the outdoor environment. We recognise the importance of providing a safe and supportive environment for physical activity and experiential learning'.

'Through our Camps Chain Safety Group, we collaborate with camp management to develop and review emergency procedures, risk management policies, program standards and workplace occupational health and safety. This ensures that educator efforts in coordinating an offsite excursion are supported by a culture of risk management that understands Duty of Care'.

'Our Department provides camp-relevant emergency procedures, certificate of currency information and user policies in the resources section of our website: www.dsr.wa.gov.au/camps/policies-and-insurance/emergency-and-risk-management*'*

Risk Management Mechanisms for a Tourism Business

- Take out insurance or check your existing insurance covers your risks.

- Store your registration, financial, customer data and other important business documents in a safe location.

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[72] WA Department of Sport and Recreation – Recreation Camps Risk Management

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- Perform regular backups of your digital data and store the backup in a secure offsite location.

- If you have data protection devices (such as fireproof safes) check you are using them appropriately.

- Check you have proper up-to-date virus protection, secure networks and firewalls, and secure password protection procedures.

- Check that your property and infrastructure is appropriate for the area, e.g. is it secure or is there a way you can make it more fire/flood proof?

- Regularly maintain your property to help prevent emergencies, e.g. in fire prone areas, ensure you maintain the surrounding areas of leaf litter and grasses and clear gutters regularly.

- Organise a backup for essential services (local telecommunications, electricity, gas, water and fuel).

- Research temporary office locations (such as a temporary business centre, hotel, someone's home or an office provided by a service provider).

- Research the virtual office services that could be useful in an emergency (such as a telephone answering service, mail forwarding, or a remote secretarial service).

- If appropriate, research and set up alternative ways of selling your products and services online for use during a recovery period (including setting up an e-commerce website or online auction account).

- Cross-train employees in as many areas of the business as possible to help avoid key personnel risk.

- Choose more energy efficient ways of running your business.

Preparing, Responding or Recovering from a Crisis[73]

DON'T RISK IT! is a guide to assist tourism businesses to prepare, respond and recover from a crisis has been developed by the Australian Government and Tourism Australia in partnership with all State and Territory tourism departments.

This guide is designed for use by any tourism business looking for assistance to prepare for, respond to, and recover from a crisis. It has been prepared for owner-operated businesses, as well as those with a larger number of employees.

The guide does not endeavour to provide advice on every type of crisis event or business, however it provides generic information that can be applied to a business's specific circumstances including surviving and thriving from a crisis.

A 'Crisis' may be determined by the following categories:

- Natural disaster, e.g. earthquake, volcano, tsunami

- Severe weather incident, e.g. cyclone, tornado or flood

- Escalating crime rate impacting visitor safety or other civil unrest

- Man-made disaster, e.g. chemical or gas leak, oil spill

- Bushfire, threat of firestorm, ash fallout or other air contamination

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[73] DON'T RISK IT! Australian Government and Tourism Australia

- Global Financial Crisis or fluctuating currency markets

- Major transport incident affecting visitor access

- Severe drought, food shortages

- Terrorist activity

- Pandemic, plague or other health scare

- Services breakdown, e.g. long-term power failure, water shortage

- Labour stoppage or labour market failure
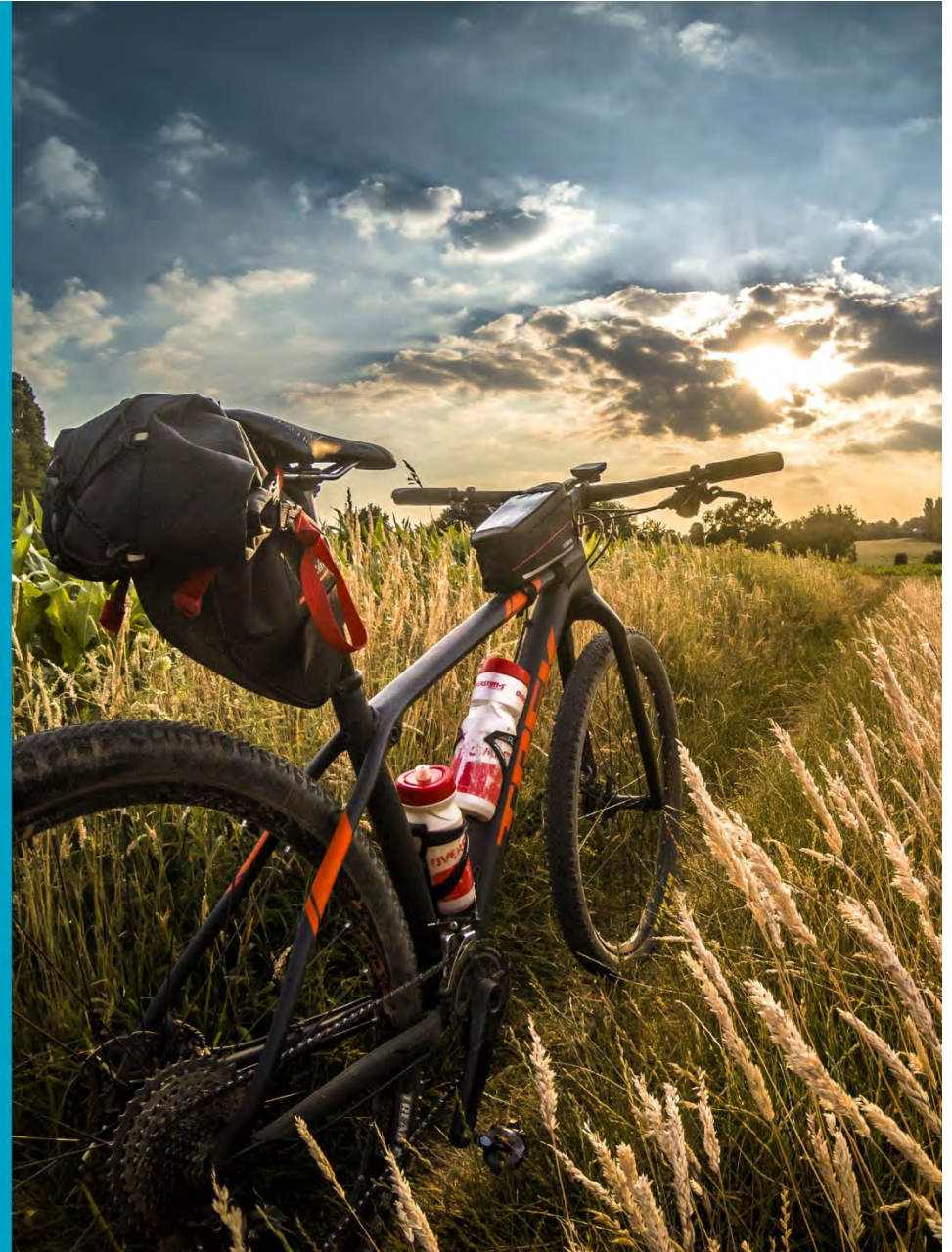
DID YOU KNOW?

"80% of businesses that experience a major crisis and do not have a continuity plan do not survive more than 2 years"[74]

See Electronic Attachment 3: Don't Risk It – Tourism 2020 Resilience Kit for Tourism Businesses

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[74] APEC International Centre for Sustainable Tourism

Section 23:

Financial Planning and Analysis

23. Financial Planning and Analysis

Financial Analysis

Assumptions

A sensible approach to the Financial Analysis section of the proposed Bindoon Mountain Bike and Adventure Park development has been undertaken. Many feasibilities drill down into metrics which provide a comprehensive overview of financial outcomes. The problem, however, is that most of the key initial inputs which all other financial outcomes are derived from, are anecdotal at best, because of the high- level conceptual nature of the design option.

This is similarly the case for a development such as proposed in Bindoon. Because of this, the financial analysis has been segmented into eight phases, and the veracity of each input has been clearly identified.

To follow, some base outcomes have been collated to provide an approximate overview of what financial outcomes "may" be possible.

Note: Exact costs for the majority of the phases detailed below can only be obtained via a formal quote or tender process for goods and services associated with the development.

Financial Assumptions

Phase/Cost	Cost Assumption Basis	Accuracy Level
1. Land Acquisition	Using an average of the two existing valuations for the subject site	Given the large variance between the two variations, rise or fall could be 20%
2. Detailed Design	Input from experienced trail designers has assisted	Rise or fall of 5%

Financial Assumptions

Phase/Cost	Cost Assumption Basis	Accuracy Level
	in achieving a relevant cost input	
3. Planning/Approvals	Standard development percentage of construction costs	Rise or fall of 5%
4. Construction Costs	Standard development lineal metre rates used for inputs. Rates vary according to trail difficulty levels	Until detailed design has been completed and a better understanding of soil, topography etc is clear, rise or fall of 5% should be considered
5. User Numbers	Using existing operations inputs from like facilities	Large range of variables here contribute to a rise or fall of 10%
6. Operational Costs	Using existing operations inputs from like facilities has provided the varied OpEx line items and their relevant inputs	Rise or fall 5%
7. Marketing	Using existing operations inputs from like facilities and standard percentage of overall construction cost inputs	Rise or fall 2%
8. Trail Maintenance	Using existing operations inputs from like facilities	Variances in topography, soil conditions, weather etc contribute to a rise or fall or 10%

Table 36: Financial analysis segments

Construction Cost Estimates

Cost estimates have been based on the preferred Option 2 Design Concept provided as Attachment 6: Design Concept, and cost outlines provided in Section 17: Design Concept, Design Concept Features

Stage 1

Stage 1 Construction Cost Estimates

Feature	Quantity	Length/Area	Rate	Total
Land Acquisition	1	94.5 ha		$650,000
Detailed Design	1			$85,000
Approvals	1			$40,000
Trail Head, Carpark, Trail Hub	1	3,000 m2		$220,000
Signage	Multiple			$34,000
Pump/Jump, and Adventure Skills Park	1	4,000 m2	$85 per m2	$340,000
Green Circuit Walk/Ride Trail	1	5,000 lm	$40 per lm	$200,000
Black/Blue Trails	6	4,500 lm	$50 per lm	$225,000
Blue Trails	3	4,000 lm	$40 per lm	$160,000
Green Trails	2	1,000 lm	$30 per lm	$30,000

Stage 1 Construction Cost Estimates

Feature	Quantity	Length/Area	Rate	Total
Walking/Spectator Access Trail	1	1,500 lm	$35 per lm	$52,500
Mid-Line Point	1	250 m2	$6	$1,500
Summit Point	1	1,500 m2	$15 per lm	$22,500
Green Walk/Ride Trail	1	800 lm	$20 per lm	$1,600
Drag Uplift	3	800 lm	$285 per lm	$228,000
Road Uplift	1	900 lm	$75 per lm	$67,500
TOTAL STAGE 1				**$2,357,600**

Table 37: Stage 1 construction cost estimates

Stage 2

Stage 2 Construction Cost Estimates

Feature	Quantity	Length/Area	Rate	Total
Signage	Multiple			
Black/Blue Trails	3	2,250 lm	$50 per lm	$112,500
Blue Trails	2	2,800 lm	$40 per lm	$112,000
Green Trails	1	500 lm	$30 per lm	$15,000
Pump/Jump, and Adventure Skills Park	1	3,000 m2	$85 per lm	$255,000

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Stage 2 Construction Cost Estimates				
Feature	Quantity	Length/Area	Rate	Total
Walking/Spectator Access Trail	1	1,500 lm	$35 per lm	$52,500
TOTAL STAGE 2				**$547,000**

Table 38: Stage 2 construction cost estimates

Stage 3

Stage 3 Construction Cost Estimates				
Feature	**Quantity**	**Length/Area**	**Rate**	**Total**
Signage	Multiple			
Black/Blue Trails	3	2,250 lm	$50 per lm	$112,500
Blue Trails	1	1,400 lm	$40 per lm	$56,000
Green Trails	1	500 lm	$30 per lm	$15,000
TOTAL STAGE 3				**$183,500**

Table 39: Stage 3 construction cost estimates

Total Construction Estimate

Total Construction Estimate	
Stage	**Total**
Stage 1	$2,357,600
Stage 2	$547,000
Stage 3	$183,500
TOTAL	**$3,088,100**

Table 40: Total construction estimate

Start Up/Operational Costs

Additional to the capital required to construct a development of this nature, it is also vitally important to understand the second-tier costs associated with establishing and rolling out the operational phase of the development. These costs are an important factor in ensuring the initial allocated funding amount can cover the outgoings until revenue streams take effect.

The information to follow is an example only of start-up/operating costs which would be applicable to a development and operations such as the proposed Bindoon Mountain Bike and Adventure Park development.

Cost line items and estimates have been based gathering information from like facilities and adding those to general OpEx inputs.

Note: Does not include depreciation, interest or professional fees.

Start Up / Operational Costs	
Item	**Cost Estimate (Annual Figure)**
General Business Set Up	
ASIC business name registration (5 years)	$84.00
Marketing	
Logo – Brand Design	$300.00
1000 x Business Cards	$170.00
2000 x A4 / DL Brochure design and printing	$700.00
Domain registration (2-5 years)	$40.00

Start Up / Operational Costs	
Item	**Cost Estimate (Annual Figure)**
Website development, hosting (12 months), email register, hosting (12 months)	$3,500.00
Uniforms	$800.00
Product Photoshoot	$1,000.00
Other Marketing – social media, print media etc @ 2% of construction costs	$32,000
Memberships	
Chittering Tourist Association	$85.00
WestCycle / WAMBA *May change with WestCycle merge in 2019-20*	$70.00
Outdoors WA	$165.00
Tourism Council of WA (TCWA) *Free with annual Tourism Accreditation*	$289.00
Destination Perth	$395.00
Tourism Accreditation	
Australian Tourism Accreditation Program *Includes free annual TCWA membership*	$289.00
Insurance	
Broadform Liability Insurance	$40,000
Workers Compensation Insurance	*May be under existing Shire Policy*

Start Up / Operational Costs	
Item	**Cost Estimate (Annual Figure)**
Other	
Trail Maintenance	48,000.00
Utilities	$15,000
Shuttle Bus and trailer	$70,000
Start Up/Operational Costs Total	**$212,887.00**

Table 41: Start up operational costs

Monthly Seasonal Projections

User number inputs have been based on like facilities in Western Australia only, to ensure regional variances such as capital city population, international visitors statistics, distance from population bases, other tourism offerings etc. are not overly skewed by offering inputs based on east coast locations which have significantly larger populations bases; are closer to larger population bases; receive higher international visitor numbers; and are in closer proximity to other tourism offerings.

The following table is a monthly seasonal projection of what user numbers could be achieved.

User Numbers	Jan	Feb	Mar	Apr	May	June
	500	500	800	1,800	1,800	1,800

User Numbers	July	Aug	Sept	Oct	Nov	Dec	Total
	1,800	1,800	1,800	1,800	1,800	1,000	**17,200**

Table 42: Monthly seasonal projections

These user number estimates are for riders only and do not factor in any increased user numbers for co-located activities or events at the venue.

Revenue Generation

Like all developments, generating revenue is key to the ongoing performance and viability of the facility. As has been previously mentioned, much like a golf course, mountain bike trail developments are exposed to individuals looking to gain access to the facility without paying. Clever design and management principles can minimise this impact.

The following image outlines some of the revenue generating processes which are supported by the proposed Bindoon Mountain Bike and Adventure Park development design concept.

Upon completion of a detailed design, firmer fee payment regimes could be established. For the purposes of the Feasibility Study, the following figures provide a broad projection of the revenue schedules which may be accessed.

The following fee rates are estimates only which have been gathered from using existing facility data and fee structures.

Figure 93: Revenue generation fee rates

Fees	Overview
Facility Entry Fees	With a well-designed and well-located check in/registration building, the vast majority of users can be corralled to ensure payment of relevant fees are captured. Additional to that, operations may include course marshals to check that users have registered and paid which creates a sense of accountability for all users to follow due process. The building will also house other services such as bike maintenance/hygiene and other park related services.
Road Uplift Fees	This can be part of a tiered registration fee structure which users can pay for.
Event Registration Fees	This can generate sporadic revenue. Typically, riders who wish to enter an event will pay a fee to do so.
Surface Uplift Fees	This can be part of a tiered registration fee structure which users can pay for.
Adventure Park Fees	This can be part of a tiered registration fee structure which users can pay for.
Lease Options	Potential to consider all or part of the operations for lease. In particular, the trail head/hub building, which

Fees	Overview
	can house alternate services such as bike maintenance etc, may appeal to prospective lessees.

Table 43: Revenue generation fee overview

Estimating the breakdown of fee user types is difficult. To gauge a potential turnover figure, a simple extrapolation using the uplift fees as the main user type (70% @ $45) and the remainder as the bottom tier fee type (30% @ $15), an estimated average fee base per person payment is $36 per person, which translates to an estimated turnover of $619,200. *Note this figure does not include value-add sales revenue as proposed in the next section.*

Figure 94: Estimated annual turnover

Potential Forms of Value-Add Sales Revenue

Other forms of value-add revenue may be generated via a range of complementary products, services and partner suppliers aimed at the delivery of a comprehensive, high quality customer experience for example:

- Augmented reality MTB experience

- Beach volleyball court / equipment hire

- Bike hire

- Bike maintenance and repairs

- Bike wash station

- Branded merchandise, apparel and giftware

- Cabana / MTB shack hire

- Corporate team building program

- Cricket set equipment hire

- Geocaching trail experience

- Go pro hire

- Group activity programs (community, youth, tours, clubs, corporate, government, special interest groups etc.)

- Helmets and safety gear hire

- School and home school group programs

- Kids pre-school MTB fun club

- Ladies club days

- Mother's group parent/child rides

- MTB instructor/coach training camps

- MTB rider training camps

- MTB rider tuition / coaching

- Outdoor bush cooking classes (showcasing local produce)

- Personal security lockers

- Pop up public events e.g. culinary, star gazing, water park, orienteering

- Sales commissions for the promotion and sale of external tours and experiences in the region

- Spa soak tubs (hot tubs)

- Tours e.g. MTB, walking or Aboriginal cultural guided tours

- Vending machine: sunscreen, power drinks, energy gels, snacks, water, towels, merchandise etc.

Access to Grants and Funding

Access to grants and funding for the planning, development, construction and/or operation of the proposed Bindoon Mountain Bike and Adventure Park may be available to the Shire of Chittering and/or partnering private or non-profit organisations in due course.

Based on the success of recent State and Federal grants provided to mountain bike trail projects in Dwellingup, Nannup and Collie, all three projects have had one common trait. All three projects had already committed significant Local Government Authority funding, time and planning.

For example, The Shire of Murray invested $1.2million in the development of the Dwellingup National Trails Centre, collocated with the Dwellingup Visitor Centre and Forest Heritage Centre – Jarrah Forest Lodge (Backpacker accommodation) in 2017-2018. In March 2019 the Federal Government committed an additional $3.465 million through the Building Better Regions Fund to further develop a trail town in Dwellingup; and in April 2019, the Forest Heritage Centre - Jarrah Forest Lodge was granted $135,000 for facility upgrades (enabling Youth Hostels Australia (YHA) accreditation) through the State Government's Regional Economic Development (RED) Grants program.

It has been advised that Tourism WA support, prospective funding and future marketing assistance may be based on a new tourism attraction's capacity for visitation, economic contribution to the State and impact of a regional, state or national significance (levels of support on a sliding scale from regional to national).

It is advisable however, to financially plan the ongoing operations of the proposed facility based on revenue return to ensure ongoing sustainable business operations into the future without the need of funding support.

An overview of current grants and funding schemes has been provided previously in this report.

See Section 5: Situation Analysis, Grants and Funding Assistance

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Park Features

- NO PURCHASE OF EXTRA LAND PORTION NEEDED
- DRAG UPLIFT TO MIDLINE AND SUMMIT POINT TRAIL ACCESS LOCATIONS FROM BOTH SIDES OF MOUNTAIN
- MIDLINE POINT TRAIL ACCESS TO GREEN AND BLUE TRAILS
- CLOCKWISE GREEN CIRCUIT "CLASSIC" WALK & RIDE TRAIL
- VARIETY OF BEGINNER TO ADVANCED MOUNTAIN BIKE TRAILS
- SKILLS PARK WITH PUMP AND JUMP TRACK AREA WITH PROGRESSION FEATURES
- HIKING TRAIL TO ACCESS MOUNTAIN AND SPECTATOR VANTAGE POINTS
- TRAIL HUB WITH DAY RECREATIONAL FACILITIES PROVIDING RACE VILLAGE FUNCTIONS AND A PERMANENT SMALL RECEPTION/ ADMINISTRATION BUILDING
- EASY ACCESS TO SPORTS CENTRE AND TOWN

LEGEND

- 01 TRAILHEAD/ TRAIL HUB/ RECEPTION
- 02 PUMP/ JUMP SKILLS PARK
- 03 ADVENTURE ZIPLINE
- 04 GREEN CIRCUIT TRAIL (WALK & RIDE)
- 05 BLACK/ BLUE MTB TRAILS AREA
- 06 BLUE MTB TRAILS AREA
- 07 GREEN MTB TRAILS AREA
- 08 CLASS 3 WALKING BLUE TRAIL
- 09 MIDLINE POINT
- 10 SUMMIT POINT
- 11 DUAL DIRECTION RIDE & WALK GREEN TRAIL
- 12 BOTTOM SE CORNER
- ●●● DRAG UPLIFT
- ✚ EMERGENCY ACCESS POINT (EAP)

EAP 1
EAP 2
EAP 3

LOT# 3874

UPLIFT

FUTURE CARAVAN-PARK LOCATION

PERTH

SPORT CENTRE

TOWN

N

threechilliestrails
unique | crafted | iconic

Breakaway TOURISM PTY LTD

Project:
Bindoon Mountain Bike Park

Drawing Title: Plan Option_A
Scale: NTS
Date: June 2019

A

Park Features

- PURCHASE PARTIAL OR WHOLE OF ADJACENT PROPERTY AND UPGRADE VEHICLE ACCESS
- SHUTTLE BUS UPLIFT TO SUMMIT POINT TRAIL ACCESS LOCATION FROM BASE TRAIL HUB
- DRAG UPLIFT TO MIDLINE AND SUMMIT POINT TRAIL ACCESS LOCATIONS FROM EAST SIDE OF MOUNTAIN
- CLOCKWISE GREEN CIRCUIT "CLASSIC" WALK & RIDE TRAIL
- VARIETY OF BEGINNER TO ADVANCED MOUNTAIN BIKE TRAILS
- SKILLS PARK WITH PUMP AND JUMP TRACK AREA WITH PROGRESSION FEATURES
- HIKING TRAIL TO ACCESS MOUNTAIN AND SPECTATOR VANTAGE POINTS
- TRAIL HUB WITH DAY RECREATIONAL FACILITIES PROVIDING RACE VILLAGE FUNCTIONS AND A PERMANENT SMALL RECEPTION/ ADMINISTRATION BUILDING
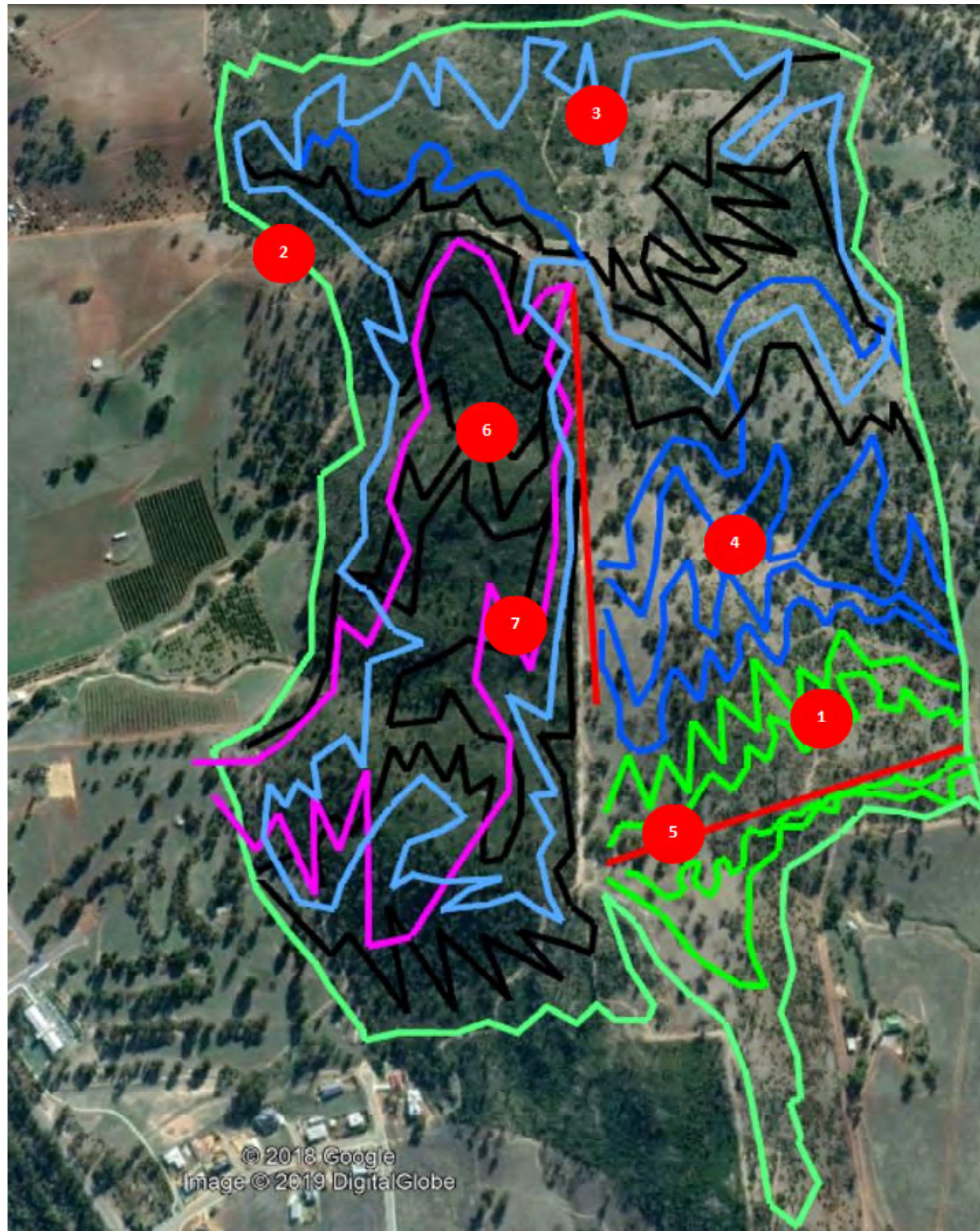- EASY ACCESS TO SPORTS CENTRE AND TOWN

LEGEND

- 01 TRAILHEAD/ TRAIL HUB/ RECEPTION
- 02 PUMP/ JUMP SKILLS PARK
- 03 ADVENTURE ZIPLINE
- 04 GREEN CIRCUIT TRAIL (WALK & RIDE)
- 05 BLACK/ BLUE MTB TRAILS AREA
- 06 BLUE MTB TRAILS AREA
- 07 GREEN MTB TRAILS AREA
- 08 CLASS 3 WALKING BLUE TRAIL
- 09 MIDLINE POINT
- 10 SUMMIT POINT
- 11 DUAL DIRECTION RIDE & WALK GREEN TRAIL
- 12 BOTTOM SE CORNER
- ••••• DRAG UPLIFT
- ••••• ROAD UPLIFT A or B
- EMERGENCY ACCESS POINT (EAP)

Map labels

UPLIFT
LOT# 3874
EAP 3
EAP 2
EAP 1
Shire of Chittering
UPLIFT B
UPLIFT A
PARTIAL PURCHASE BOUNDARY
WHOLE PURCHASE BOUNDARY
FUTURE CARAVAN-PARK LOCATION
PERTH
SPORT CENTRE
TOWN
Northern
Fishers Rd
N

threechilliestrails
unique | crafted | iconic

Breakaway
TOURISM PTY LTD

Project:
Bindoon Mountain Bike Park

Drawing Title: Plan Option_B
Scale: NTS
Date: June 2019

B

Attachment 7:

Trail Network Design Concept

Designed by Three Chillies Trails

TRAILS OVERVIEW

1. Descending Green Trail

2. Green walk/ride circuit trail

3. Descending/climbing blue trails

4. Cross country descending/climbing blue trails

5. Drag lift

6. Technical, jump and cross country black trails

7. Walking/spectator trails

**Note: Trail locations and routes are conceptual only. More detailed "ground truthing" needs to be undertaken to establish more precise routes and locations.

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