WESTERN AUSTRALIAN CYCLE TOURISM STRATEGY

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01 EXECUTIVE SUMMARY

Image source: DBCA Parks and Wildlife

Bike riding is one of the world's fastest growing recreational, sport and tourism activities and is a travel motivator that provides economic return for the destination of choice. Encompassing several disciplines, and the ability to develop cycle tourism specific infrastructure and events, the benefits are wide-ranging and customisable to the characteristics of each destination.

The aim of this Strategy is to outline a strategic approach to cycle tourism, which markets provide the greatest opportunity and what is required to deliver extraordinary cycle tourism experiences.

Cycle tourism has been identified globally, by the United Nations World Tourism Organisation, as a key growth adventure tourism activity due to its low-impact, high-spend, and high-dispersal nature. Cycle tourists typically stay longer, spend more and engage in a broader range of experiences than the average visitor. As such cycle tourists promise significant merit as a potential tourism target market. The cycle tourist is categorised under seven different cycle types;

- Road
- Track cycling
- Mountain biking
- BMX
- Touring (on-road or off-road)
- Recreation
- Event participant

These types can then be further broken down under three different user cohorts;

- Leisure
- Enthusiast
- Sport.

Cycle tourists are an extremely lucrative visitor market, and when a destination can successfully target and cater for this growing market they will stand to benefit tenfold from their investment. Cycle tourists can be categorised under two main market segments;

- Those who travel to a destination to cycle, and
- Those who undertake incidental bike riding whilst on holiday.

Studies have identified that whilst a cycle tourist's average daily spend is comparable with the average overnight visitor their overall trip spend is nearly five times as high. Other key characteristics include;

- Total trip expenditure is approximately $2000 per domestic cycle tourist and $5,005 per international cycle tourist
- High tendency to become repeat visitors to a destination
- More likely to visit WA than the average overnight visitor
- Have a higher propensity to travel to regional areas
- Tend to love fine wine, good restaurants and outdoor activities in natural environments

Furthermore, adventure travellers (as identified in the UNWTO report, and under which classification cycle tourists fit) are more sensitive to soft infrastructure (marketing, signage, quality tours/guiding, trail cleanliness), and are less sensitive to deficiencies in hard tourism infrastructure (roads, airports, accommodation).

Bike riding is an excellent way to experience the outdoors and is highly accessible to people of all ages, abilities and social backgrounds. Cycling can be a primary reason for travel and WA has the ability to cater for cycle specific motivators including diversity, climate, uniqueness, quality, accessibility and community. Development considering these motivating attributes will capitalise on the significant cycle tourism market.

Since 2012, WA's traditional cycle tourism markets (domestic, UK, Germany, US) have all seen steady growth between 10% to 20%, as would be expected; however new cycle tourism markets have seen exponential growth across three year averages, mainly in markets from China (166.5%), Singapore (67.6%) and Malaysia (62.4%).

Cycle tourism marketing has been traditionally focused on events, with 12 events featuring a cycle component sponsored in 2016-2017 by Tourism WA, through their Eventscorp division. Tourism Australia promotions currently point to recreation cycle tourism, mainly being Rottnest and Swan Valley. Future marketing is reliant on two factors; evidence of growth potential of the market, and sufficient critical mass to warrant promotion.

Moving forward it is imperative that marketing captures the propensity of cycle tourists to disperse and engage in a multitude of experiences and opportunities exist in outlining and developing the following;

- Focus Markets(Domestic, UK, Germany, US, SE Asia and China)
- Destination Development
- Infrastructure
- Events
- Marketing
- Packages
- Itineraries
- Athlete Development

Image source: Tourism Western Australia

This strategy identifies four priority areas that require consideration and development to support the growth of cycle tourism in Western Australia; investing in the industry, marketing and events, and delivering a great riding experience.

PRIORITY AREA 1:

INVESTMENT IN THE INDUSTRY

A sustainable cycle tourism industry requires good management models, a comprehensive understanding of the market and a governance hierarchy with clear responsibility. This area addresses requirements for research, governance, legislation and community.

PRIORITY AREA 2:

MARKETING

Cycle tourism is a niche market and provides the ability to target marketing activities to attract a higher yield visitor market. A comprehensive marketing strategy would ensure competitiveness in the marketplace. This area addresses requirements for strategy, content, itineraries, packages and events.

PRIORITY AREA 3;

EVENTS

The successful development of a comprehensive events calendar is crucial to raising the profile of Western Australia as a cycle tourism destination. Events attract visitors who may not have otherwise travelled to WA, and are also an instrument in driving infrastructure and asset development. This area addresses requirements for strategy, event assessment criteria, investment, workforce, venues and itineraries.

PRIORITY AREA 4:

DELIVERY OF THE RIGHT EXPERIENCE

It is vitally important that once the investment and marketing has been delivered that the end user experience matches or exceeds their expectation. This area addresses requirements for infrastructure, education & training, wayfinding & signage and safe cycling.

Future investment under these four areas is then guided by an overarching assessment criteria based on;

1. Activities which raise awareness of the destination
2. Those activities which encourage and support dispersal to regional areas
3. Those markets and user cohorts who will provide the greatest return in the shortest time

WESTERN AUSTRALIA HAS THE POTENTIAL TO BECOME AN INTERNATIONALLY REKNOWN CYCLING DESTINATION, FOCUS ON THESE FOUR PRIORITIES WILL HELP ACHIEVE THIS OUTCOME.

02 CYCLE TOURISM

Image source: Tourism Western Australia

Cycle tourism is a growing niche tourism market. The market is dominated by cyclists who are motivated to travel to destinations primarily or solely because of the routes, trails and the riding experience. Events are also a key driver of travel motivation, and destination and facility awareness. The market also includes a much larger segment of cyclists who will ride while on holiday in a destination, although bike riding is not their primary reason for the holiday. Aside from event participant records it is hard to differentiate between cycling as a primary motivation or incidental activity. Further research should be investigated to ascertain the segment sizes and motivators for both travel purposes.

The United Nations World Tourism Organisation (UNWTO) identified cycle tourism as a key growth adventure tourism activity worldwide in their Global Report on Adventure Tourism (2013) [1]. Not only is cycle tourism more sustainable environmentally, socially and economically but it also disperses visitors to areas that traditionally do not attract tourism and supports employment in local economies. Furthermore, the United Nations recommends that at least 20% of government transport budgets be allocated to non-motorised transport programs. This is to include both hard infrastructure (bicycle paths) as well as soft programs (marketing, education and legal changes).

The report also identified that by nature, adventure travellers are;

- less sensitive to deficiencies in hard tourism infrastructure, such as airports and paved roads
- more sensitive to soft tourism infrastructure, such as signage, high-quality guide training and clean trails
- they tend to seek a variety of activities during their holiday, not limited to their primary reason to travel
- appreciate destinations that offer a greater diversity of active and immersive activities.

CYCLE TOURISM DISPERSES VISITORS TO AREAS TRADITIONALLY NOT VISITED AND SUPPORTS LOCAL ECONOMIES..

2.1 UNDERSTANDING THE CYCLE TOURIST

Cycle tourism has seen significant growth over recent years, and the cycle tourist is no longer limited to the hard-core enthusiast who has a singular focus. Typically, the profile of a cycle tourist was determined by the type of bicycle on which they spend their riding holidays. Studies worldwide have shown that where cycle tourists were typically assigned to four or five clear cycle types there is now a multitude and the lines have blurred considerably as the cyclist enjoys a greater range of cycling styles. For the purposes of providing a preliminary framework this document focuses on five cycle types to provide clarity and focus around development. As such cycle tourists are classified throughout according to the criteria outlined in Table 1.

These rider types can be further classified according to user cohorts which are detailed in Table 2.

Table 1: Tourist Type Overview

TOURIST TYPE	CYCLIST TYPE	DESCRIPTION
Recreation	Many	▪ Use any type of bike, including rapidly growing e-bike's ▪ May or may not ride on a regular basis ▪ Usually for exercise, recreation or commuting ▪ Engage in low intensity riding activities, typically around urban centres
	Road	▪ Utilise roads and/or bike paths ▪ Ride on various types of bikes but typically road or hybrid bikes
	Mountain Biking	▪ Predominantly off road ▪ Utilise purpose built single track trails
Events	Event Participant	▪ Travel specifically to participate in a cycling event (can be any of the first three cyclist types in this table)
	Road	▪ Utilise roads and/or bike paths for either competitive or participation events
	Track Cycling	▪ Bicycle racing sport held on specially built banked tracks or velodromes using track bicycles
	BMX	▪ BMX bikes on purpose built BMX tracks ▪ Travel is predominantly centred around events
Touring	Touring (on-road)	▪ Long distance riding on a relatively uniform surface ▪ Multi-day riding (from 2 up to 20 plus) ▪ Focus on reaching a destination at the end of each day but visit a variety of experiences along the way
	Touring (off-road)	▪ Long distance riding on a variety of surfaces ▪ Multi-day riding (from 2 up to 20 plus) ▪ Focus on reaching a destination at the end of each day but visit a variety of experiences along the way ▪ Can include rail trails, access/fire roads and singletrack

Table 2: Bike Rider User Cohorts

USER COHORTS	DESCRIPTION	MARKET POTENTIAL	TOURIST TYPE
Leisure	▪ General cyclists of all ages and abilities ▪ Limited skills ▪ Seeking highly accessible routes with accessible facilities and services (ie bike hire, cafes and toilets)	Large	Riding is additional to existing trip
Enthusiast	▪ Purely recreational riders ▪ Aged between 29-49 and form the existing market majority ▪ Moderate skills and ride weekly ▪ Most likely to travel for cycling as a primary purpose	Moderate	Cycling is a destination trip, however can also be additional
Sport	▪ Competitive cyclists participating in events for formal, structured activity such as group touring ▪ Usually members of a cycling club ▪ Highly skilled	Small (but influential)	Cycling is a destination trip

Studies into the travel behaviour of cycle tourists have determined that they are a highly valuable visitor market due to their propensity to stay longer, travel outside of urban centres and spend more. The key attributes of this market are [2] ;

- Their average daily spend is slightly higher than domestic visitors but nearly five times as high as their overall trip spend;
  - Average daily spend of $124 per night
  - Average length of stay is 16 nights (compared to 4.5 nights for the average overnight visitor [3])
  - Total trip expenditure is approximately $2000 per domestic cycle tourist and $5,005 per international cycle tourist
- They have a higher tendency to visit a destination more than once compared to the general visitor market
- They are more likely to visit Western Australia (16%) compared to the average overnight visitor (8%)
- More likely to be male between the age of 24-49 years of age
- They have a higher propensity to travel to regional areas
- Cycling tourists typically engage at least three times per year, suggesting that cycle tourism is a niche but high engagement activity [4].
- 83% stayed at least one night on their last cycling experience
- Cycle tourists are significantly more likely than spectators or local cyclists to love fine wine and going to the best restaurants (68%) and love outdoor activities in natural environments (82%).
- Twice as many cycle tourists travel on a long trip (5 nights stay or more) to interstate regional destinations as those travelling to intrastate destinations (18% vs. 8%)

2.2 Market Segments & Motivators

Cycle tourists come from a variety of backgrounds and are categorised according to whether riding was their primary motivation for travel or as an incidental activity. When assessed against key tourism markets identified by Tourism WA and Tourism Australia there are noted similarities.

2.2.1 Destination Cycle Tourists

"Destination Cycle Tourists" are cycle enthusiasts who regularly travel with cycling as a primary motivator. They have likely visited other Australian or international destinations and seek high quality routes/trails with good supporting infrastructure in scenic/natural locations. This group also includes event participants who travel to a destination specifically for the event; this may include pre or post event riding/touring. Destination Cycle Tourists are more likely to be "Dedicated Discoverers" under Tourism WA's segmentation of Experience Seekers.

2.2.2 Cyclists While on Holiday

"Cyclists While on Holiday" are typically leisure cyclists whose primary motivator for travel is not bike riding. Cycling undertaken may even just be an incidental activity and plays no part in influencing travel behaviour. While they view cycling as a secondary motivation for their visit they will participate in riding activities and will likely hire equipment. They may place less emphasis on the route/course/trail and more on accessibility of the facility, the setting and nearby attractions and amenities. Cyclists While on Holiday can be both "Dedicated Discoverers" and "Aspirational Achievers" under Tourism WA's segmentation of Experience Seekers (the key tourism market identified by Tourism Australia).


Image source: Tourism Western Australia

2.2.3 Market Segmentation Comparison

When assessed against the segments of the key markets identified by Tourism WA and Tourism Australia it can be seen that the two types of cycle tourists share many common traits.

Table 3: Tourism Market Segmentation Comparison

IDENTIFIED TOURISM MARKETS	DESTINATION CYCLIST	CYCLING WHILE ON HOLIDAY
Experience Seekers		
▪ International visitors that prefer to travel to new and different places	✓	✓
▪ Highly predisposed to Australia's offer	✓	✓
▪ More likely to stay longer, spend more and disperse to regional areas	✓	
▪ Found among all age groups, income levels and geographic locations	✓	✓
And are seeking;		
▪ Authentic personal experiences	✓	✓
▪ Social interactions	✓	✓
▪ Meeting and interacting with the locals	✓	✓
▪ Experiencing something different from their normal day-to-day life	✓	✓
▪ Understanding and learning about different lifestyles and cultures	✓	✓
▪ Participating in the lifestyle and experiencing it, rather than observing it	✓	✓
▪ Challenging themselves – physically, emotionally and/or mentally	✓	
▪ Visiting authentic destinations that are not necessarily part of the tourist route	✓	✓
▪ Exposure to unique and compelling experiences	✓	✓
Dedicated Discoverers		
▪ Visitors travelling primarily for learning and new experiences	✓	✓
▪ Those who want to discover something new	✓	✓
Aspirational Achievers		
▪ Visitors travelling primarily for relaxation and indulgence		✓
▪ Those who view travel and holidays as a reward for their hard work and success in life	✓	✓

Image source: Tourism Western Australia

2.3 Cycle Tourism Market Overview

In Table 4 it is clearly shown that those overnight visitors who undertake cycling while on holiday is dominated by the intrastate market (200,300 visitors), followed by international (104,400 visitors). These two markets also stay considerably longer than the average visitor; 59 nights for international visitors who undertake cycling compared to 30 nights for the average international visitor, and 5 nights for intrastate visitors who undertake cycling compared to 3.8 nights for the average intrastate visitor, whilst interstate visitation remains comparative at around 9 nights.

Anecdotal evidence also suggests significant economic activity as a result of micro tourism riding activities across key areas in the state. This can be evidenced by the thousands of riders going in to the Perth hills on any given weekend, and the increasing numbers of users on trails and routes in the south west. Data available from John Forrest National Park, 24 kilometres east of Perth, indicates an average of 8,695 visitors per month (with a peak in October of 14,693) of which nearly half (42.8%) undertaking cycling/mountain biking [5]. Broken down as 3,721 cycle/mountain bike users per months, at an average daily spend of $108 (day trip visitor average spend)[6] equates to $401,868 monthly expenditure by cycle tourists in the surrounding area.

This assessment of the current cycling tourism market indicates that there is a significant opportunity to capitalise on cycle tourism, yet currently it is done so with an adhoc response with no strategic planning. This document plans to create a framework to set a path to optimise the potential Western Australia has with cycle tourism.

Table 4. Overnight visitors to Western Australia who undertake cycling while on their trip (3 year average YE March 2015/16/17)

	VISITORS	AVERAGE LENGTH OF STAY (# NIGHTS)
International	104,400	59
Domestic overnight total	247,300	6
a. Interstate	47,300	9
b. Intrastate	200,300	5
Total	351,700	21

Source: Tourism Research Australia, International and National Visitor Surveys, Year Ending (YE) March 2017

Note: International visitors may have undertaken cycling anywhere in Australia, not necessarily WA. For domestic visitors, the activity would have been undertaken specifically in WA.

Table 5. Purpose of trip for visitors to WA who undertake cycling on their trip

(3 year average YE March 2015/16/17)

	HOLIDAY	VISITING FRIENDS AND RELATIVES	OTHER
International	57%	40%	22%
Domestic	69%	19%	15%

Source: Tourism Research Australia, International and National Visitor Surveys, Year Ending (YE) March 2017

Notes: 'Purpose of trip' is a multi-response question and will sum to more than 100%.

2.3.1 International Cycle Tourism Market

The International and National Visitor Surveys undertaken by Tourism Research Australia provide information regarding cycle tourists who visit Western Australia. This data does outline the size and scope of cycle tourism, however it does not provide any detail on all segments of cycle tourism, such as whether cycling is a primary travel motivator or an incidental activity.

International cycle visitors to Australia vary quite dramatically from the domestic cycle tourist in regard to their age, type of accommodation used and way in which they participated in cycling.

International visitors who go riding during their trip are [7];

- Mainly from the UK (20.2%), New Zealand (9.2%), the USA (8.9%), and Germany (6.5%)
- More than half (50.3%) are under 30 years of age
- They seem to be mainly backpackers - 40.3% of all international cycling visitors stayed in backpacker hostels.
- International visitors (especially backpackers) most likely go riding as part of the activities included in their organised tour – participation in cycling therefore depends on whether tour operators include cycling in their tour itineraries

In terms of country of origin Table 6 provides an overview according to the Top 20 countries who undertake cycling, however it should be noted that the cycling activity may have been undertaken anywhere in Australia, not necessarily WA. It is evident when assessing the last two 3-year averages that there has been extraordinary growth in all markets, with exceptional growth amongst Asian markets (China 166.5%, Malaysia 62.4% and Singapore 67.6%). This growth demonstrates significant opportunity to target these markets for cycle tourism.

Table 6. Top 20 markets for visitors to WA who participate in cycling while on their trip to Australia, 3 year averages

	3 YEAR AVERGE, YE MARCH 2012/13/14		3 YEAR AVERGE, YE MARCH 2015/16/17		CHANGE
MARKET	RANK	VISITORS	RANK	VISITORS	%
UK	1	20,000	1	22,100	10.3%
China	9	2,800	2	7,400	166.5%
Germany	3	5,300	3	6,000	13.9%
USA	4	5,000	3	6,000	19.0%
Malaysia	6	3,400	5	5,600	62.4%
Singapore	7	3,300	5	5,600	67.6%
New Zealand	2	5,500	7	5,500	-0.0%
France	5	3,600	8	3,700	2.2%
Japan	8	2,900	9	3,400	17.3%
Hong Kong	12	2,200	10	2,800	27.6%
Canada	11	2,400	11	2,600	10.3%
Scandinavia	10	2,400	12	2,500	4.8%
Italy	17	1,700	13	2,400	39.9%
Netherlands	15	1,900	14	2,300	21.2%
Switzerland	16	1,800	15	2,200	20.1%
Indonesia	13	2,200	16	2,100	-3.9%
Taiwan	14	1,900	17	2,000	2.9%
Korea	18	1,700	18	1,900	12.7%
India	19	800	19	1,200	57.9%
Thailand*	20	600	20	1,000	73.9%
Total		85,100		104,400	22.7%

*Sample sizes for Thailand are small (n<40) and should be used with caution

Note: International visitors may have undertaken cycling anywhere in Australia, not necessarily WA.

Source: Tourism Research Australia, International Visitor Survey, Year Ending (YE) March 2017

2.3.2 International Findings

- Approximately 11.8 million people in the UK own a mountain bike, with an estimated 1.3 million regularly biking off road
- Bicycle sales outpaced new-car sales in 2015 in all of the 27-member countries of the European Union, except Belgium and Luxembourg
- 18.7 million bikes were sold in the US in 2016 (13 million of which were adult bikes)
- 3.5 million German residents are mountain bikers (out of 7.2 million recreational cyclists)
- Mountain biking is the 10th most popular physical activity for New Zealand adults
- In the US 30% of bike commuters use a mountain bike, 28% a road bike, 18% a hybrid, and 17% a touring bike
- Bike riding could save cities $25 trillion and 10% of transport CO2 emissions by 2050. Source: Union Cycliste Internationale (UCI)
- In 2007, 130 million bicycles were produced worldwide, more than twice the 52 million cars produced.

2.3.3 Domestic Cycle Market

According to the 2017 Austroads National Cycling Participation Survey[8] there is strong participation across Australia in cycling as a recreational activity; with WA leading the way in many aspects. This demonstrates that there is strong potential for intrastate travel to undertake cycle tourism. Key findings of the study included;

- 18.5% of WA residents (approximately 483,100 residents) ride a bicycle in a typical week
- The cycling participation rate in WA is significantly higher (41.9%) than the national average (34.2%) particularly when measured over the last year
- Of the people who cycled in the last month, 85% cycled for recreation and 35% used a bicycle for transport
- Around 56% of households in WA have at least one working bicycle in their household, with 24% having three or more
- Western Australians own almost as many bicycles as cars, with an average of 1.58 bicycles per household, which is 8% higher than the Australian average of 1.46[9]
- Based on this average there is an estimated 1,381,078 bikes in Western Australia compared to 87,265 registered caravans in Western Australia in 2017 [10]

Within WA, it is estimated that over 1,200,000 people own a bike. While Western Australians only make up 10% of the Australian population, they hold 14% of the total Australian bike market, and out of the 111,000 new adult bikes sold in WA in 2004/05, 70% were mountain bikes[11]. Across Australia bicycle ownership has remained stable, and despite a slight downturn in 2016, bike sales have outstripped car sales for the past 16 years[11]. The majority of these sales are dominated by mountain bikes, exceeding sales for racing, sport/racer and touring bicycles.

2.3.4 National Findings

- General cycling was rated as the third most popular physical activity in Australia in 2013-2014, with an estimated 1.5 million participants.
- 3.6 million (17% of) people ride a bike in Australia each week and 7.4 million (37%) had ridden at least once in the previous year.
- Over the last decade 11.5 million bikes were sold in Australia, 2 million more than cars.
- Up until 2016 bicycles outsold cars for the 16th year running with almost 1.4 million bicycles sold last year.
- In 2014 Australian states and territories invested $112.8 million in cycling related infrastructure, education and promotion.
- Approximately 70% of the bikes sold in Australia are mountain bikes.
- 5.1% of Australians are commuter cyclists, compared with 14.1% for recreation or exercise.
- Over a third of our children ride a bike weekly – the highest levels of cycling participation is amongst 2 to 9 year old children where 44% had ridden in the previous week, and 32% of 10 to 17 year olds.
- Males are more likely to participate in cycling than females: 21% of males and 12% of females had ridden in the previous week.
- 55% of households have at least one bicycle in working order.
- The average Australian household has 1.5 bicycles in working order.

2.3.5 Participation in Recreational Activity

Across Australia participation in cycling is the third most popular recreational activity (6.2%), behind gym/fitness (17.4%) and running/jogging (7.4%). Table 7 outlines participation by Australians in the top three outdoor-based, non-sport recreational activity as provided by the latest Participation in Sport and Recreation, Australia survey.[12] Participation in all forms of cycling far outweighs the other activities, and continues to experience steady although small growth.

Females were more likely to walk for exercise than males (25% and 14% respectively), whilst males were more likely than females to participate in cycling and BMXing (8.5% and 4.0% respectively), as shown in Table 8 below[5].

Table 7. Persons participating in Sport and Physical Recreation 2013-14

ACTIVITY	PARTICIPANTS 2013-2014	CHANGE FROM 2010
Cycling	1,151,900	0.9%
Bushwalking	285,600	-30.7%
Canoeing / Kayaking	129,700	14.8%

Table 8. Persons participating in Sport and Physical Recreation 2013-14

RECREATIONAL ACTIVITY	PARTICIPATION RATE (%)	
	Males	Females
Cycling	8.5	4
Bushwalking	1.4	1.7
Canoeing / Kayaking / Dragon boat racing	0.8	0.5

2.3.6 Travel Purpose

Travel purpose assesses a cyclist tourist according to the primary motivation for their travel. A dedicated cycle tourist travels primarily for cycling experiences, which are then complemented by other experiences on offer in location. The second segment of the cycle tourist are those who may undertake a cycling activity whilst on holiday, however this activity is often incidental with motivators other than cycling influencing their travel decision.

Currently no continual data is collected at a state or national level which distinguishes between cycling as a primary travel purpose or secondary (ie was an incidental activity undertaken whilst on holiday with no previous planning to do so). However, the EY Sweeney Report, Growing Cycle Tourism in Victoria (2015)[13] , did capture information regarding the most common bike riding activity undertaken by a cycle tourist. The higher participation in passive bike riding activities such as sightseeing (41%), cycling on cycle paths (35%) and day tripping (25%) would indicate significantly higher numbers of incidental cycling activity prompted by awareness at the destination itself (such as visibility of people bike riding, accessibility to hire bikes, and bike tours). It was also noted across numerous reports that cycling undertaken in metropolitan areas was a much higher incidental activity than riding undertaken in regional areas, where pre-planning on cycle activities increased.

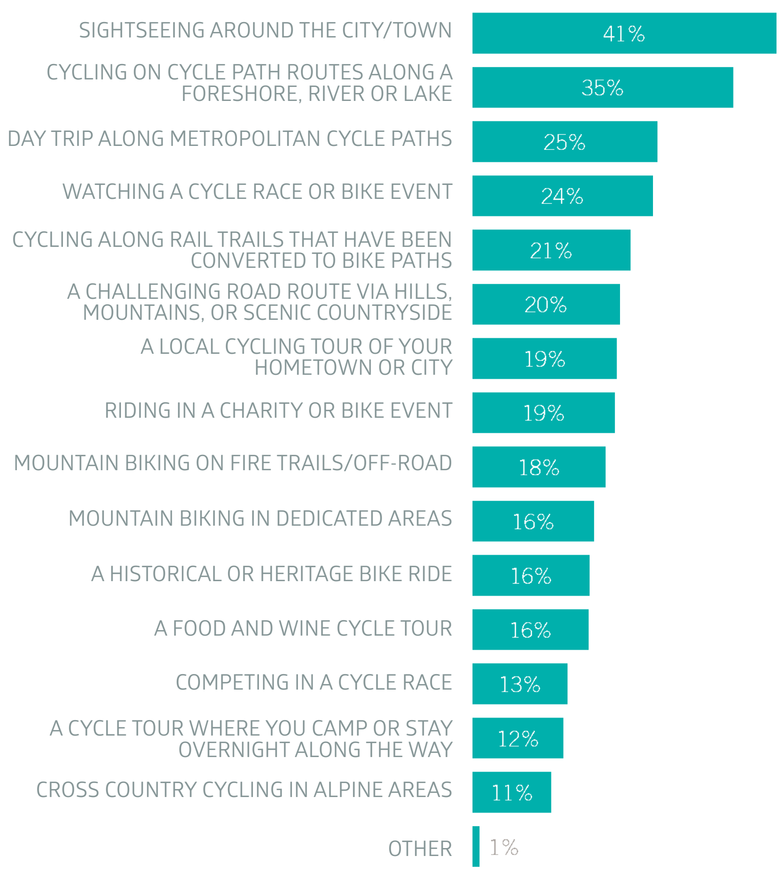


Figure 1 Most common activities

(Source : EY Sweeney (2015), Growing Cycling Tourism in Victoria – Report, Ernst and Young)

2.3.7 Metro Cycling compared to Regional Cycling

The EY Sweeney Report, Growing Cycle Tourism in Victoria (2015)[14] , provides comprehensive data on the motivations of cycle tourists when choosing a metropolitan or regional destination. The report found that there are noted differences in the reasons cycle tourists travel to metropolitan areas compared to regional areas. The reasons for travelling to a regional area were more often to experience the outdoors and sightseeing, whereas those travelling to a metropolitan area were most likely to do so as a spectator or competitor in a cycling event. In addition, those visiting a metro destination were significantly more likely to have experienced a food and wine cycle tour than those to regional destinations (17% vs 6%). This suggests that wineries close to metro areas (such as the Swan Valley, and possibly the Margaret River region) play an influential role in cycling tourism. [11]

When it comes to choosing a destination from a metro/regional perspective, there was a significant difference in the role that cycling plays in decision-making. Three quarters (74%) of those visiting metro areas (on their last trip) reported that cycling was the main reason for the choice in destination, compared to 53% for those going to regional destinations. This suggests that a combination of factors, such as other activities/ experiences on offer, factors were taken into account when planning a cycling trip to regional areas. The propensity of cycling tourists travelling to metropolitan areas participating/spectating in cycle events highlights the importance of events in profiling a destination.

Image source: Tourism Western Australia

03 CURRENT LANDSCAPE

Image source: Declan von Dietze

There has been no better time to undertake a Cycle Tourism Strategy for WA with the development of several new trail networks in the past 12 months, the release of the South West and Perth & Peel Master Plans, the finalisation of the State Cycling Facilities Strategy, a State High Performance Plan, the growing popularity of cycling events and the state election promise through ‘A Better Cycling Future’ of an additional $27 million on cycling infrastructure over four years.

3.1 Existing Planning Framework

There has been extensive work over recent years, both at a local and state level, to develop a comprehensive framework of plans to guide the strategic development of cycling investment, expansion and marketing in the state. Figure 2 provides an overview of what currently exists.

Table 9 provides an analysis of state and regional tourism development strategies which have highlighted the potential of cycle tourism, or include development areas in which cycle tourism could be a key success driver.

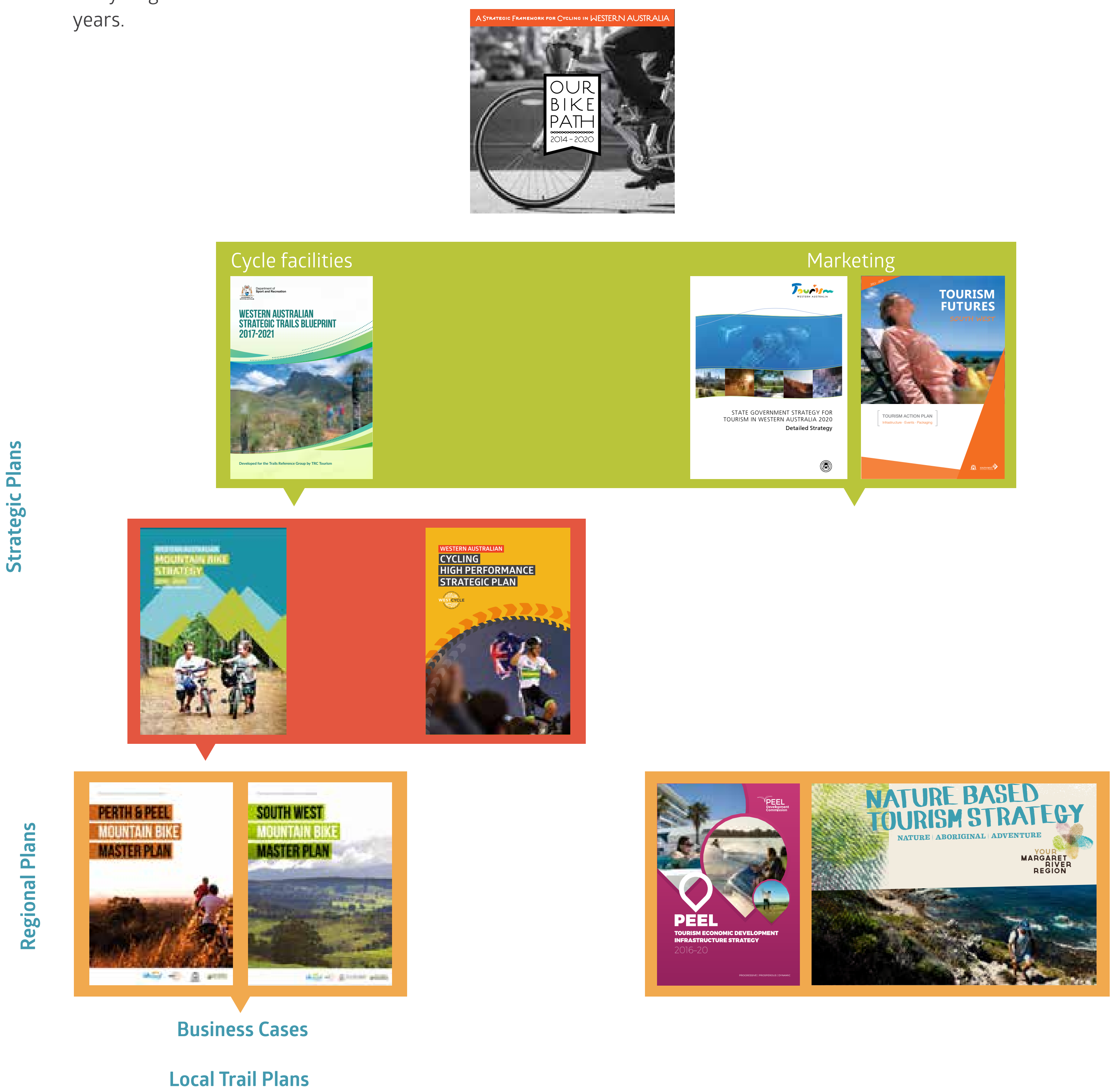


Figure 2 Existing framework of cycling plans in WA

Table 9. Tourism Development Strategy Overviews

ORGANISATION	STRATEGY	OBJECTIVE/ PRIORITY AREA	RELEVANCE
Tourism WA	Tourism 2020	▪ Events - Position WA as a recognised events destination for locals and visitors	▪ Events are a key driver for national and international cycle tourists
		▪ Regional Travel - Increase visitors to regional WA	▪ Cycle tourists have a higher propensity than the average tourist to disperse to regional areas ▪ Most Tourism WA sponsored cycling events are in regional areas ▪ Cycle tourists have a tendency to engage in extraordinary regional experiences, including nature-based and culinary experiences
	Taste 2020	Perth Regional Objectives – must try experiences	▪ Swan Valley and Perth Hills boast some of the State's top cycle trails which can be used for touring culinary experiences in the area
	Australia's South West Destination Development Strategy 2007-2017	Munda Biddi Trail	▪ A bike trail of national significance, with scope for continued development well into the future
	Experience Perth Destination Development Strategy 2007-2017	▪ Swan River Estuary Visitor Facilities	▪ Provision of visitor facilities which link cycle paths beside the Swan River; to include construction of a shared path linking Centenary Park (Clontarf foreshore) with existing path in Waterford planned by the City of South Perth. ▪ Cycle Paths: The Recreational Shared Path (RSP) around the Swan River now exceeds 60km in length.
		Swan Valley Cycle Network	▪ Provision of a cycle path in the Swan Valley with a link to Whiteman Park ▪ Staged implementation of the Swan Valley Bike Plan
		Swan Valley Bike Trail	▪ A cycle trail and interpretative signage within the Swan Valley to connect and interpret the wine, food, art and cultural tourism businesses
	Australia's Golden Outback Destination Development Strategy 2007-2017	Attraction & Activity Investment	▪ Develop mountain bike trails along former Wood Line's interpretative centre ▪ Develop Kalgoorlie-Boulder walk and bike trails in partnership with local government
	Swan River Strategy Draft Discussion Paper - 2016	Improved Connectivity	▪ Increase the connectivity between key nodes on the river through further development of biking and walking paths and trails, or other public transport options.

Margaret River Busselton Tourism Association	Nature Based Tourism Strategy	Identified Potential Hero Products	▪ Development of trails – walk, bike, quad bike, horse ▪ Development of the mountain biking market ▪ Support the development of the region as a mountain biking destination as identified within broader WA stakeholder strategies such as the WA Mountain Bike Strategy 2015 – 2020 and the related South West Mountain Bike Master Plan, which includes the development of the Bramley National Park trail network.
		Partnership Strategies	▪ Align with adventure sport groups and events, specifically in the progress of the Western Australian Mountain Bike Strategy 2015 – 2020 and the South West Mountain Bike Master Plan.
South West Development Commission	Tourism Futures South West	Infrastructure – projects of state significance	▪ Implementation of South West Mountain Bike Plan Master to create a world-class South West mountain bike network ▪ Pemberton Trail Hub - The development of a Southern Forests world class tourism hub situated around high-quality mountain bike trails systems and supported by a complete package of hospitality and visitor services ▪ Nannup Tourism Trails Hub - Extend the Trails Hub program in the region to Nannup by the development of existing and new Nannup trails and associated services ▪ Munda Biddi Mountain Bike Trail – support the promotion of the trail as an iconic off-road adventure bike trail
Peel Development Commission	Tourism Economic Development Infrastructure Strategy	Peel tourism infrastructure themes, strategies and initiatives	▪ Improve Peel's walk, bike, canoe and nature experiences at sites growing in popularity (e.g. Dwellingup, Serpentine, Peel & Harvey Inlets, Lake Clifton, Yalgorup & Jarrahdale). ▪ Upgrade and link drive, cycle, equine, hiking and kayaking trails throughout the Region (i.e. an interconnected trail network).
Department of Transport	Leeuwin Naturaliste 2050 Cycling Strategy	Key driver cycle tourism	▪ At time of writing, strategy in draft format.

3.2 Marketing

There has been a noted increase in the promotion of cycle tourism over the past 18 months, which has primarily been driven by event marketing. Marketing in this strategy is assessed under three areas, awareness, promotions and events, in order to ascertain what people know and what is being done to increase this knowledge.

3.2.1 Awareness

Although there is significant growth in the market, awareness of cycle tourism destinations in Australia is limited. A report undertaken by Tourism Research Australia [15] found most of the survey respondents couldn't name a destination they associated with cycle tourism. Of those that could, the most common response was France (14%). This awareness is the result of a few key observations; the profile of cycling generated by events (Tour de France), acceptance of cyclists by the French public and their expansion of trail networks (particularly those done with old railway networks). In the case of Australian destinations, regional areas were more likely to be nominated than capital cities.

3.2.2 Promotions

Tourism WA lists cycling as one of its top 5 Active Outdoors activities on their website. However, this information is limited to metro locations and the Munda Biddi Trail. The events arm of Tourism WA, Eventscorp, also provides sponsorship for several events which incorporate cycling. In addition to their events promotion schedule there has been a recent increase the amount of general cycle tourism promotion undertaken with dedicated promotion of bike riding events published on Tourism WA social media accounts. In April 2016 Tourism WA ran a 4 day/3night cycling package in partnership with Garuda Indonesia Holidays. The package was promoted to the Indonesian market, including flights with Garuda Airlines (who still offer a fly your bike for free option), and accommodation and touring in Perth, which resulted in approximately 40 pax.

At a regional level a number of Regional Tourism Organisations and Local Tourism Organisations have been proactive in marketing cycle tourism across multiple platforms, including social media, websites and printed media. This marketing is predominantly around mountain biking, with road cycling really only prevalent in event marketing.

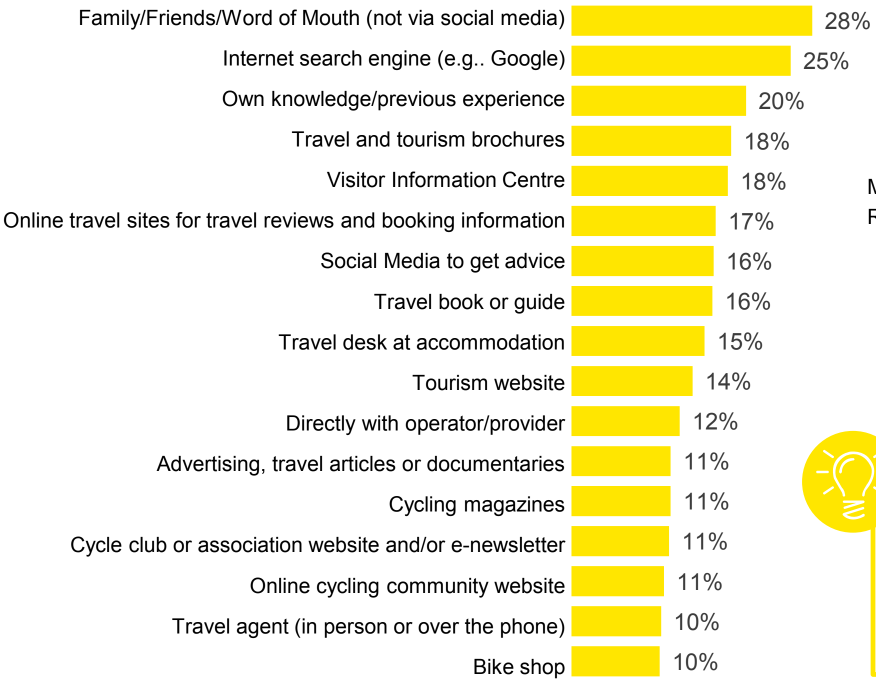
A search of the Tourism Australia website for cycling lists the Swan Valley as number one and Rottnest as number two in its search results. For these WA locations to be listed 1 and 3 respectively is of great benefit to the state's profile in the cycle tourism market. The Swan Valley Visitor Centre has developed a Cycle Trail, which is supported with extensive digital marketing and a dedicated cycle brochure. The brochure includes information on four routes, themed around food and wine, and heritage. This draws great links between the cycle nature identified above of cycle tourists, who are often interested in travelling to regional areas with a diversity of attractions and have a high propensity to participate in a food and wine cycle tour. Rottnest Island is an obvious inclusion as cycling is the only mode of transport (apart from shuttle buses) on the island. Bike hire is promoted extensively through the Rottnest Island Authority website, at the local visitor centre and by both ferry operators servicing the island. Bikes can be booked as part of a ferry travel package or once on the island.

Both Tourism Western Australia and Tourism Australia rely on industry supplied content, and will only repurpose content provided to them by a local authority or tourism business. This does raise the issue of who then is responsible for producing and distributing the content for community assets or general recreational pursuits which are not the domain of any single business. Tourism WA have also outlined two key considerations required to support dedicated investment in marketing cycle tourism, being;

1. Evidence of growth potential of the market

2. Sufficient critical mass (that there is a wide variety of quality experiences/tours/product) to warrant promotion

In the study undertaken by EY Sweeney, the top 10 sources of information for a cycling experience was outlined. Word of mouth from a trusted source or a Google search were the most utilised source, however the relatively even weighting across all sources indicates that cycle tourists use a broad range of reference points, and a significant amount of research was undertaken in the planning stages of the trip.



Metro origin ↑ 21%
Regional origin ↓ 5%

The fact that there was quite a spread across all information sources suggests that recent participants were not just turning up at a destination and cycling but rather, they were seeking information from a myriad of sources pre-cycle trip.

Figure 2 Top 10 sources of information for a cycling experience

(Source: EY Sweeney (2015), Growing Cycling Tourism in Victoria – Report, Ernst and Young)

3.2.3 Events

Events are an important part of cycling and WA already boasts several top events, however there are few facilities that meet national and international UCI event hosting criteria, there are numerous challenges in running certain events, such as closing roads, getting Local Government and Police approvals and the costs involved in doing so. Furthermore, events are a key marketing tool for a destination and often capture market that wouldn't have otherwise travelled to a specific destination for bike riding. Across the cycle types there are a multitude of events covering International, National, State and Regional events. Western Australia struggles to attract large-scale international and national events due to the cost involved in doing so and the financial loss they pose to the respective state bodies. Below is an overview of the current events sponsored by Tourism WA which incorporate a cycling component.

Table 10. Tourism WA Funded Events 2016/2017

EVENT	TYPE OF CYCLING EVENT	LOCATION	PARTICIPANT NUMBERS	ECONOMIC BENEFIT
Busselton Ironman	Road	Busselton	2500	$10.06 million
Festival of Triathlon	Road	Busselton	3000	N/A
Cape to Cape MTB	MTB	Margaret River Region	1300	$2 million
Augusta Adventure Fest	MTB	Augusta	3576 (competitors) 6329 (spectators)	$12 million
X Adventure	MTB	Dunsborough	1500 (competitors) 4000 (spectators)	$5 million
The Gibb Challenge	MTB	Kimberley	3950 (participants)	$1.2 million
Goldfields Cyclassic & Community Challenge	Road	Goldfields (Kalgoorlie & surrounds)	250 (participants)	$100,000
Tour of Margaret River	Road	South West	630 (participants) 1300 (spectators)	$770,000
UCI Gran Fendo World Championships (2016 only)	Road	Perth	1500	$2 million
Karri Valley Triathlon	Road	Pemberton	N/A	N/A
Albany Urban Downhill	MTB	Albany	260 (participants) 8,600 (spectators)	N/A
Dwellingup 100	MTB	Dwellingup	1100	N/A
Beverly Heroic	All	Beverly	208 (participants)	N/A

The following is an overview of two events (one mountain bike and one road cycling) which capture the importance and value of events, not only during the event period but also the long-lasting benefits they have on the host community.

3.2.3.1 Gibb Challenge

The Gibb Challenge is a socially competitive 660 kilometre team relay event along the Gibb River Road in Australia's North West. The event raises community awareness and money for the Royal Flying Doctor Service. When the Gibb Challenge started there was very basic camping facilities at the Imintji Community[16]. Each year the race organisers have worked with the community to develop a dedicated camping area. Now they have a fully functional, structured and commissioned camp ground that will provide employment and income for the community in to the future. In addition, the business proposal for government support lent heavily on the annual migration of the event, bringing 400 cycling adventurers to their community. Events also provide a platform to generate funds for charity purposes. The Gibb Challenge is a charity event which has raised in excess of $7 million since their inception in 2007. In 2017, they raised almost $450,000 for the Royal Flying Doctor Service. The broader benefits also involve changing community attitudes. The Gibb Challenge has changed the cycling culture in the Kimberley. Before the event there was only one group of road cyclists who regularly met. There are now multiple riding groups meeting regularly (both road and mountain bike). Other benefits include;

- Construction of a pump track by the Shire of Broome
- New tour starting which will offer fat bike tours on Cable Beach
- Kununurra has an approved mountain bike course out by Lake Argyle
- Halls Creek and Fitzroy Crossing have weekly riding groups and have each hosted mountain bike events.
- The remote aboriginal communities of Kalumburu and Yiramalay have embraced cycling into their school programs and Looma has a BMX track
- The students from Yiyili joined the event in 2014 and 2015 offering barista coffee and filmed the documentary Bush to Belly
- There are plans underway to invite the students from Ardyaloon (One Arm Point) to emulate the barista program in 2018

3.2.3.2 Tour of Margaret River

The Tour of Margaret River (the Tour) is Australia's only Pro Am cycling event for teams. The 2016 Tour was a three-day, three-stage event which had 105 teams competing. It was held in the townships of Cowaramup and Nannup, and the Leeuwin Estate Airfield. Of the 615 people who participated in the 2016 Tour, 493 were from Australia (80%) and 20% were international participants. Key outcomes of the event have been;

- $770,000 expenditure by participants
- There was also a considerable international element, with 64 competitors from the UK, 13 from New Zealand, seven from Ireland, seven from South Africa, five from the Netherlands and five from Canada.
- 80% of Tour participants stayed 3-4 nights, and most of those in serviced apartments in Margaret River.
- A key focus of the event has been to support growth amongst women participants – In 2016 72 participants (15.3%) were women.
- The event has attracted a number of high-profile riders to Western Australia, including Marianne Vos, Moniek Tenniglo, Luke Durbridge, and Emma Pooley.
- The Tour has grown to become one of the most prestigious events on the WA cycling calendar, and the largest event for teams in the country.

Image source: Tourism Western Australia

When assessed against other events it is evident that there is merit in supporting and developing cycle events or events which incorporate cycling due to their high return on investment. As per the table below outlining events hosted in the 2009/2010 period events, those which incorporated a cycling component were first (World Long Distance Triathlon Championships) and third (Ironman Western Australia) in respect of return on investment.

Table 11. Return on investment for Tourism WA funded events hosted 2009/10

EVENT	RETURN ON INVESTMENT	CALCULATED USING INDEPENDANT ASSESSMENT AS FOLLOWS
Australasian Safari	$1 : $5.50	Economic impact 08/09 Media Impact 09/10
Cricket City Perth	$1 : $9.40	Media Impact only 09/10
Hyundai Hopman Cup	$1 : $13.00	Economic impact 09/10 Media Impact 09/10
Indian Rim Asian University Games	$1 : $6.20	Economic Impact only 09/10
Ironman Western Australia Triathalon	$1 : $10.80	Economic impact 09/10 Media Impact 07/08
Margaret River Pro Surfing	$1 : $1.40	Economic impact 09/10 Media Impact 09/10
One Movement for Music Perth	$1 : $2.30	Economic Impact only 09/10
Red Bull Air Race	$1 : $2.60	Economic impact 09/10 Media Impact 09/10
Rugby Test v England (June 2010)	$1 : $0.80	Economic impact 09/10 Media Impact 09/10
Rugby Test v South Africa (August 2009)	$1 : $7.50	Economic impact 08/09 Media Impact 09/10
World Ling Distance Triathalon Championships	$1 : $17.60	Economic Impact only 09/10

(Source: http://www.parliament.wa.gov.au/parliament/commit.nsf/(Evidence+Lookup+by+Com+ID)/125820AEDE57827848257831003C133D/$file/ef.eho11.101213.001.aqton.Tourism.pdf)

Nationally and internationally accredited cycling events have the ability to drive strong tourism benefits to the host destination. Not only do such events draw large numbers of participants they also host significant spectator and support crew numbers. The Australian national and international cycling calendar is currently dominated by Victoria, and Cairns played host to the UCI Mountain Bike World Cup in 2017, as outlined in Table 12 below. When Cairns hosted the UCI Mountain Bike World in 2014 the event drew over 10,000 spectators and brought in an estimated $10 million to the Queensland economy[17]. It has been highlighted however that the event is at risk of continuation due to the lack of surrounding/nearby product or similar events. In addition, the effort required for international competitors to travel to Cairns for a single event has many questioning the validity/expense of attending. In 2016 and 2017 Western Australia will not be holding a single nationally or internationally certified event in any discipline as it doesn't have the investment or in some cases the infrastructure to support such events. The only exception to this was the UCI Gran Fondo World Championships that were held in Perth in early 2017. Considering all the above it is critical that coordination of events takes place at a national level in order to support the growth of international events in Australia and New Zealand to ensure critical mass to keep events of this scale running and viable.

Table 12. Australian Cycling Events

BMX

YEAR	CATEGORY	LOCATION
2017	National Championships	Brisbane, QLD
2016	National Championships	Bathurst, NSW
2015	National Championships	Brisbane, QLD
2014	National Championships	Shepparton, VIC
2013	National Championships	Brisbane, QLD

Track Cycling

YEAR	CATEGORY	LOCATION
2017	Elite National Championships	Brisbane, QLD
2017	Masters National Championships	Bass Hill, NSW
2016	Junior National Championships	Launceston, TAS
2016	Elite National Championships	Adelaide, SA
2016	Masters National Championships	Melbourne, VIC
2015	Junior National Championships	Melbourne, VIC
2015	Elite National Championships	Melbourne, VIC
2015	Masters National Championships	Bass Hill, NSW
2014	Junior National Championships	Melbourne, VIC
2014	Elite National Championships	Adelaide, SA
2014	Masters National Championships	Melbourne, VIC
2013	Junior National Championships	Bass Hill, NSW
2013	Elite National Championships	Bass Hill, NSW
2013	Masters National Championships	Midland, WA

Road Cycling

YEAR	CATEGORY	LOCATION
2017	Junior National Championships	Ulverstone, TAS
2017	Elite National Championships	Ballarat, VIC
2017	U19 Road Championships	Geelong, VIC
2017	Masters Road Championships	Gold Coast, QLD
2017	UCI World Tour Event – Tour Down Under	Adelaide, SA
2016	Junior National Championships	Bendigo, VIC
2016	Elite National Championships	Ballarat, VIC
2016	U19 Road Championships	Canberra, ACT
2016	UCI World Tour Event – Tour Down Under	Adelaide, SA
2015	Junior National Championships	Shepparton, VIC
2015	Elite National Championships	Ballarat, VIC
2015	U19 Road Championships	Gold Coast, QLD
2015	Masters Road Championships	Tweed Coast, QLD
2015	UCI World Tour Event – Tour Down Under	Adelaide, SA
2014	Junior National Championships	Toowoomba, QLD
2014	Elite National Championships	Ballarat, VIC
2014	U19 Road Championships	Canberra, ACT
2014	Masters National Championships	VIC
2014	UCI World Tour Event – Tour Down Under	Adelaide, SA
2013	Junior National Championships	
2013	U19 Road Championships	Noosa, QLD
2013	Elite National Championships	
2013	UCI World Tour Event – Tour Down Under	Adelaide, SA

Mountain Biking

YEAR	CATEGORY	LOCATION
2017	UCI Mountain Bike World Cup	Cairns, QLD
2017	International Enduro World Series	Derby, TAS
2017	XCM National Series	QLD, ACT
2017	Crocodile Trophy	Cairns, QLD
2017	MTBA Solo 24hr Championship	ACT
2017	MTBA Gravity Enduro National Championships	Fox Creek, SA
2017	Cross Country National Series	NSW, QLD, WA, ACT
2017	Downhill National Series	NSW, VIC
2017	MTBA Schools National Champs	QLD
2017	Cape to Cape Stage Race	Margaret River, WA
2017	Port to Port Stage Race	NSW
2017	The Redback	NT
2017	Dwellingup 100	Dwellingup, WA

Image source: Declan von Dietze

3.3 Assessment of Current Assets

The Western Australian cycle tourism industry is still in its infancy however much has been done to build the different segments of the market due to a passionate and proactive cycling community. There are a wide range of assets for the various cycle groups ranging from purpose-built infrastructure (such as the SpeedDome and BMX courses) or dual-use resources (those shared with a variety of cycle users or other recreational pursuits), although some are limited in their ability to cater for national or international events.

The Perth Bicycle Network is comprised of three different types of paths, which can be categorised as follows[18];

These routes are signposted with blue Perth Bicycle Network signage. The network also includes road routes with clearly marked shoulders, and on-road bike lanes for riders. Where PSPs are not provided, these can be a 'safe enough' route to ride. They are usually secondary minor roads, and keep bikes off busy main roads.

Principal Shared Paths (PSPs)

- Known as the freeways of bike paths connecting destinations with a reasonable distance in between them.
- Longer, more direct trips between centres with minimal interruptions from other traffic
- Suitable for less experienced riders (and pedestrians)
- 3-4 m wide, as straight and flat as possible, surfaced with red asphalt with at least 0.5 m compacted limestone shoulders
- A 0.5 m clearance from obstructions is required wherever possible and at intersections, underpasses or overpasses are adopted where feasible to give grade separation and
- Many PSPs run along railway lines and freeways
- These are suitable alternative active transport routes, which are safer than riding on the road and encourage cycling for transport.

Recreational Shared Paths (RSPs)

- Generally follow river foreshores and beachfronts
- Are not direct routes to destinations
- Very popular with pedestrians and other users and, consequently, are intended for recreational riders
- Some RSPs function as commuter routes

Tourism Focused Recreational Shared Paths (TSPs)

There is potential to build on the metropolitan path network through the development of a comprehensive network of scenic cycle routes which will enable cyclists to experience some of the region's iconic tourism locations, including Perth City, the Swan River, Perth Hills and the coastline. The development of five key paths would capitalise on the appeal of iconic landmarks and would be extensions of existing path networks, including; Indian Ocean Beach Ride, City to Surf Cycle Route, Kings Park Cycle Loop, Swan River Cycle Circuit and Perth Hills Cycling Route. From a regional perspective, there are a number of sealed paths throughout the state which lend themselves perfectly to the Tourism focused Recreational Shared Path categorisation and could be significant tourism assets if promoted effectively, such as the sealed pathway that runs between Busselton and Dunsborough and from the Margaret River town centre to Prevelly.

In addition to TSPs the paths most suited to cycle tourism are RSPs due to their proximity to high-traffic tourist areas and the nature of the bike riding activity. The following table provides an outline of the current cycle assets within Western Australia along with identified gaps.

Table 13 Western Australia Cycle Assets

	CURRENT OFFERING	IDENTIFIED GAPS
Road	▪ The Recreational Shared Path (RSP) network around the Swan River now exceeds 60km in length. ▪ Road network available for on-road touring	**RSPs** ▪ There are gaps within the network and opportunities for new networks. ▪ The routes are not promoted as tourism routes where they should and could be. ▪ There needs to be clear separation of paths for cyclists and pedestrians in high traffic locations ▪ The focus for RSP's have a 'transport' focus rather than a tourism focus as money for planning and development largely comes from the Department of Transport. ▪ The 'way finding' on the network is poor. ▪ Include no structured touring routes (especially in the South West which has big potential)
Track	▪ SpeedDome ▪ Western Australia's only combined indoor cycling velodrome and roller sports complex	▪ Located in Midvale the SpeedDome is not central ▪ The cost to hire the venue makes hosting National events unrealistic unless external funding is provided. ▪ Western Australia only has 1 usable velodrome in the State
Mountain Bike	WA ▪ 8 rail trails are open to mountain bikers, accounting for 260 kms of off-road trails	▪ No locations of national or regional significance ▪ No tangible and marketable mountain bike product exists ▪ High majority of trails on DBCA managed land ▪ No permanent event facilities ▪ Very limited commercial or business investment in trails ▪ No locations meet national or regional infrastructure, amenities or service requirements ▪ There are no locations that have trail centres or meet trail hub criteria
	Perth & Peel Region ▪ 141km of sanctioned trails ▪ 10 designated trails/trail networks	▪ ≤9% of residents have good access ▪ Over 120km of unsanctioned trails ▪ Only one formal location (Kalamunda) ▪ ≥90% of people drive a car to go riding
	ASW Region ▪ 229km of sanctioned trails ▪ 12 designated trails/trail networks	▪ Only 18% of ASW residents have good access to purpose built mountain bike trails ▪ ≤20% of the region's sanctioned mountain bike trails are purpose built singletrack ▪ Only 15% of singletrack trails are in good condition ▪ ≤10% of all trails are well-signed purpose built singletrack ▪ Existing trails are mainly suited to riders with intermediate skill levels (12% cater for beginners, 16% for advanced riders) ▪ Only one location can be rated as regionally significant

BMX	▪ 8 metropolitan clubs ▪ 12 regional clubs	▪ There is no facility with a dual ramp system (5 metre and 8 metre ramps)
Touring (off-road)	▪ Munda Biddi Trail ▪ 8 epic bike touring trails (out of the 20) listed on Cycle Trails Australia website	▪ There is sometimes a disparity between the perceived versus actual experience on Munda Biddi Trail, with an expectation that the trail only traverses highly scenic and natural landscapes. ▪ Most of the 8 epic bike touring trails listed are remote and would only be suitable for experienced riders

Image source: Tourism Western Australia

3.4 Western Australia's Unique Selling Points

Based on the key target markets identified above the unique proposition on Western Australia as a cycle tourism destination becomes focused on the desire of these markets to travel to new destinations, engage in the local culture, and experience nature and the outdoors. As such Western Australia's points of difference are;

- Expanses of natural environments, with great contrasts across short distances
- Diverse landscapes across the state with the south west offering being very different from the north west
- Diversity of key experiences in addition to cycling such as food & wine, particularly around Perth and the South West
- Undulating topography which caters for a broad cross section of the cycling market and provides cyclists with the opportunity to enjoy the surrounding landscape
- The weather in WA makes it ideal for cycling year-round (Mediterranean climate)
- Accessibility to South East Asia (as closest Western destination)
- New offering for the dedicated cycling market looking for experiences beyond the east coast of Australia
- Close proximity of towns through the south west and around Perth which lend themselves well to cycle touring

3.5 Barriers for WA

In order to adequately understand the opportunities for Western Australia it is important to provide a context surrounding any barriers. The greatest barrier at this stage is awareness of Western Australia as a cycle tourism destination. The dominance in market by Tasmania, Victoria and South Australia (due to key events, dedicated marketing and investment in infrastructure) means that Western Australia sees a very small percentage of the domestic cycle tourism market. It is also the common issue of whether supply or demand should come first as the driver for market development. Table 14 below provides an overview of the barriers, what discipline they relate to and are then ranked as to their impact (high, medium or low).

Table 14 Cycle Tourism Barriers for Western Australia

HIGH IMPACT | MEDIUM IMPACT | LOW IMPACT

BARRIER	ROAD	TRACK CYCLING	MOUNTAIN BIKE	BMX	TOURING (ON-ROAD)	TOURING (OFF-ROAD)	RECREATION	EVENT PARTICIPANT	TOTAL MARKET IMPACT
Awareness, perceptions, marketing and promotion									
Awareness of destination, experiences and facilities	✓	✓	✓	✓	✓	✓	✓	✓	HIGH IMPACT
No overarching brand proposition for WA	✓	✓	✓	✓	✓	✓	✓	✓	HIGH IMPACT
Lack of uniform and centralised information point	✓	✓	✓	✓	✓	✓	✓	✓	HIGH IMPACT
Safety (when using dual use paths/ roads)	✓				✓		✓		MEDIUM IMPACT
Perception of travel time and cost (for east coast/international markets)	✓	✓	✓	✓	✓	✓	✓	✓	HIGH IMPACT
Perception of the style of riding available (ie only downhill, extreme racing)			✓			✓			LOW IMPACT
Infrastructure and facilities									
Lack of event facilities/ infrastructure	✓	✓	✓	✓				✓	MEDIUM IMPACT
Undersupply of trails within or in close proximity to population centres			✓			✓			LOW IMPACT
No international facility			✓	✓				✓	LOW IMPACT
Lack of way marked routes	✓		✓			✓	✓		MEDIUM IMPACT
Limited network of trails/routes in a singular location			✓						LOW IMPACT
Lack of bike hire facilities, or centralised drop-off/pick-up system	✓		✓		✓	✓	✓		MEDIUM IMPACT
Limited availability and accessibility of different styles of riding offering various levels of technical difficulty, including routes or trails for beginners			✓			✓	✓		MEDIUM IMPACT
Events									
No nationally or internationally accredited events	✓	✓	✓					✓	MEDIUM IMPACT
Lack of strategic direction for event development and bidding	✓	✓	✓	✓	✓	✓	✓	✓	HIGH IMPACT

Image source: Tourism Western Australia

3.6 Competitor Destinations

Across Australia a number of states are starting to implement dedicated cycling tourism strategies, and Tasmania has also started capturing dedicated market research on cycle tourists. The following is an assessment of competitor destinations across Australia and New Zealand.

3.6.1 Tasmania

Tasmania's Department of State Growth released a draft Cycle Tourism Strategy in late 2016 to support their state tourism and event strategies. The three priority areas in the strategy are focused on consolidating trails and routes, marketing, and development of supporting infrastructure and services. The growth of Tasmania's cycle tourism market has exploded in recent years due to a number of initiatives. The Blue Derby trails have put north east Tasmania on the world mountain biking map, events have helped to grow both mountain bike and road cycling participation, and Lonely Planet has listed the West Coast as one of the best touring routes in the world. Cycle tourism generates $14.4 million annual expenditure for Tasmania. The Tasmanian Visitor Survey findings for the year ending December 2016 shows mountain biking has experienced huge growth over the past two years, increasing by 56 per cent from 8,000 visitors to more than 20,000. Over the coming years there has been a government commitment of $3.1million to establish North-East Tasmania as one of the world's premier mountain biking destinations through the creation of a 66km network of trails.

3.6.2 South Australia

South Australia was the first state in Australia to develop a state-wide cycle tourism plan, with the release of the South Australian Tourism Commission's Cycle Tourism Strategy 2005-2009. The state's cycle tourism offering is supported with an extensive network of cycling trails, from inner city routes to the 900km Mawson Trail. By their own admission their competitive advantage is that the city and regional areas are relatively flat with a wide variety of attractions and experiences (including closeness to the coast, wine and food regions, and a growing base of bike entrepreneurs).

Awareness of South Australia is high amongst the domestic cycle tourism market due to the annual Santos Tour Down Under event, a nine-day road cycling event through Adelaide and regional South Australia. In 2016 795,000 people attended the event, which contributed more than $49 million to the state's economy. In 2008 the Santos Tour Down Under joined the UCI World Tour, the first event outside of Europe to do so. The event is held in January every year, making it the first event on the international cycling calendar. South Australia has 5 of the top 9 cycling destinations and Melrose is the location for two of the top mountain bike events in Australia. Significant investment is underway in developing cycle facilities with the Mt Lofty Ranges being developed as an international mountain bike destination.

3.6.3 Victoria

In 2011 Tourism Victoria released their Cycle Tourism Action Plan 2011-2015 which aimed to position Victoria as the leading state for cycle tourism, as well as to outline how the Government will leverage and enhance opportunities in cycle tourism. As host to several cycling events, including the annual National Elite Road Championships, the 2012 UCI Elite Track Cycling World Championships, the state also has a network of cycle trails, for both road and mountain bike. The key areas of the plan were designed to outline their current position in the market, provide an overview of visitation and segmentation and propose directions to increase awareness and visitation. The plan identified that like WA, one of the challenges facing Victoria's cycle tourism sector was a lack of economic analysis and research. Out of this Tourism Research Australia produced their Growing Cycle Tourism in Australia report in December 2015. Bike Buller is an initiative to broaden the offering at Mt Buller (a traditional ski resort location) and includes events, the annual Mountain Bike Summit, rental & tours, and accommodation for cross country, gravity and mountain bike disciplines.

3.6.4 New Zealand

Internationally New Zealand is renowned for its cycle tourism offering, particularly in regard to mountain biking. At a national level Tourism New Zealand has recently undertaken dedicated mountain bike marketing to grow their share of the cycle tourism market. Around 171,000 holiday visitors participated in cycling in 2016, with an estimated value of $817 million (NZD). They have also identified that cycle tourists are more valuable than the average tourist. The Australian cycle marketing is their primary target, and they have been positioning themselves as a new challenge/thrill location. In addition, they are targeting visitors from the UK, USA and Germany who are generally well-travelled, financially secure and keen to experience other activities alongside their cycling experience; the same markets identified for Western Australia.

3.7 Case Studies

Cycle tourism has been actively embraced by several national and international destinations due to the high value of cycle tourist, the ability of the market to extend visitation seasons. Australia's foray into the market has been relatively new, but significant work has been done by some states in recent times to capitalise on the industry. Below is an overview of what has been done by other destinations and what results have been achieved as a result.

3.7.1 Tasmania

Tasmania had virtually no legal mountain bike trails when the Tasmanian Mountain Bike Plan was released in 2009. Mountain biking was first highlighted as a growth industry by the State's Department of Sport and Recreation in 2005 following the downturn of the resources industry and subsequent decline in employment opportunities in the early 2000s. Since then formal trail construction has boomed with several new projects in the pipeline. A key driver of this growth is the fast-growing mountain biking market, driven by the new Blue Derby trails in Tasmania and the work being done by Tourism Northern Tasmania in developing cycle tourism. In 2013 Dorset Council (in Northern Tasmania) was successful in securing funding of $2.45 million in 2013, making the $3 million Blue Derby Trails project partnership between Dorset and Break O'Day Councils, Forestry Tasmania, Parks & Wildlife and public, private and community sectors, the largest single mountain bike project in Australia (encompassing 80km of trail). In the case of Derby an extra 25,000 people a year have visited the town since the Blue Derby mountain bike trails were opened in 2015. In July 2013, the Tasmanian Visitor Survey [19] began collecting data on mountain biking visitors to Tasmania (previously in only captured cycle data in general). The latest Survey results and other industry reports have shown significant growth in cycle tourism over the last 12 months (to December 2016), including;

- Cycle tourism generates $14.4 million annual expenditure for Tasmania based on lowest figure of $124 spend per night (higher estimates point to an overnight expenditure of $244 per night) [20]
- 16.1% growth in cycle (other than mountain bike)
- 51.7% growth in mountain biking
- 22.1% growth overall

3.7.2 New Zealand Cycle Trail

The New Zealand Cycle Trail originated as a partnership project between the New Zealand Government and the Green Party of Aotearoa New Zealand. An investment of $50 million by the Government was supported with additional contributions of $30 million from local Government and cycle trail trusts. This investment has resulted in 23 Great Rides being established across the country. The Great Rides are predominantly off-road trails that showcase the very best of New Zealand's landscape, environment, culture and heritage. Originally an off-road trail initiative the project was recently expanded to include on-road cycle touring routes. An evaluation report of the New Zealand Cycle Trail [21] in 2016 outlined the following results;

- 1.31 million users
- 83% walkers and cyclists, 17% commuter cyclists
- 86.5% domestic users, 13.5% international users
- $37.4 million in economic benefits
- $12 million in social benefits

3.7.3 Whistler Mountain Bike Park

Whistler is a Canadian resort town in the southern Pacific Ranges of the Coast Mountains in the province of British Columbia, Canada, approximately 125 km north of Vancouver. Traditionally known as a world-famous ski destination and home to the 2010 Winter Olympics, Whistler has seen a rapid growth in cycle tourism over the past 20 years. The surrounding region has fostered every type of riding experience, and Whistler itself has evolved in two short decades into one of the most sought-after mountain bike destinations in the world. The 2016 Whistler Mountain Bike Economic Impact Study [22] highlights significant benefits from their investment and promotion of cycle tourism. This includes;

- 533,000 rides in Whistler
- $46.6 million in visitor spending directly attributable to mountain biking
- 389 jobs supported
- $75.9 million in economic activity supported in British Columbia
- 102,500 out of town visits made to ride in Whistler during 2016
- $18.1 million in wages and salaries supported in Whistler
- $19.3 million boost to provincial GDP

3.7.4 Santos Tour Down Under

The Santos Tour Down Under is an action-packed international event attracting the world's best cyclists for a nine-day festival which showcases the very best of South Australia. Since gaining UCI WorldTour status in 2008, the event has grown to be the largest and most prestigious cycling event of its kind in the southern hemisphere. It remains South Australia's largest event, one that injects more than $49 million into the economy each year. The 2016 event generated[23] ;

- 795,432 general attendance, including 36,000 from interstate and overseas
- 39,121 event specific visitors
- 336,518 event specific visitor nights
- $49.6 million in economic impact
- $258 million calculated PR value
- 613 full time equivalent employment roles

Image source: Wayne Lewis

04 OPPORTUNITIES FOR WA

Image source: WestCycle

Western Australia is a vast and diverse landscape with the potential to develop a unique and sophisticated cycle tourism offering. With a mild Mediterranean climate in the south of the state, and a temperate dry season in the north the climate is suited to year-round riding. The landscape is dominated by rolling hills and beautiful scenery which caters for a broader cycle tourism market, and provides enjoyable riding and touring for the novice through to the expert market. Cycle tourism is an activity which embraces local landscapes and cultures, and supports low impact access to those landscapes. There is also a comprehensive offering of tourism attractions and experiences which can be leveraged to support cycle tourism activities. Western Australia is a unique tourism destination, and innovative and creative strategies can be used to turn barriers into very strong and unique propositions for the cycle tourism market. Some of these reverted barriers include;

1. Remoteness

- Well suited to the interests of the more intrepid international markets
- Provides a new offering for those who have experienced all that the east coast offers and are looking for something new
- Proximity to emerging Asian markets
- Unique remote landscape, especially in north west (appeals to the high adventure European market, particularly the German market)

2. Underdeveloped Offering

- Industry development can be structured around learnings of the more developed cycle tourism destinations as to what works and what doesn't
- Marketing can be targeted to emerging segments (such as bike packing, gravel, eBikes) which are most suited to the product offering and provide the highest return
- Strategic development of trail destinations in iconic landscapes, rather than having to work with community led trails which may not be located in suitable tourism destinations
- Ability to develop supporting industry and infrastructure (ie cycle friendly businesses/ locations) in conjunction and with consideration to the development of the offering or experience
- Faster and easier adoption of new technologies

When assessed under the areas of focus markets, destination development, infrastructure, marketing, events there is a wide scope of opportunities for Western Australia to leverage.

4.1 Focus Markets

With the explosion world-wide in cycle tourism there is an opportunity for Western Australia to capture some of this market. Based on an assessment of national visitor trends, reports undertaken by Victoria and Tasmania, and the work being done in New Zealand cycle tourists are generally well-travelled, have a higher disposable income, are more likely to disperse outside metropolitan areas on their trip, stay longer and engage in a range of activities beyond just cycling whilst on holiday. As outlined in Section 2 leisure cyclists have the greatest potential, followed by enthusiasts. In regard to their place of origin and their travel behaviour (which best fits the offering of Western Australia) the key target markets are from;

1. Australia
2. United Kingdom
3. United States
4. Germany
5. South East Asia

Anecdotal evidence indicates strong growth across Asian markets, including;

- The Singaporean (and to a slightly lesser extent the Malaysian) market, both amongst expats and Singaporean nationals, for mountain biking. The Singaporean market also tends to travel in traditionally off-peak and shoulder seasons, dispersing well outside of Perth (particularly to the south west). It would be interesting to assess whether this market would travel for longer periods for cycle tourism (like the typical cycle tourist), as they have currently a tendency to travel for short periods (usually 2-3 days).
- Indonesia (road cycling) – informal touring in small groups. Garuda Airlines offer a fly your bike for free service which could be capitalised upon with any packaging promotions
- Hong Kong (track cycling) – WA has a good reputation due to the high number of successful athletes to come out of the state and perception of less political red tape around usage of the SpeedDome, compared to the world-class velodrome in Hong Kong which has severe limitations on venue usage.

As the closest western destination, with a desirable climate and a sound cycling offering Western Australia has a strong competitive edge in targeting Asian markets. An interesting correlation across all these Asian markets in this high attendance of students from these markets at Western Australian universities. Student tourism has already been identified by Tourism WA and some RTOs as a possible niche market which could build tourism advocates (students who travel, families of students who come to visit and travel, and ex-students who come back to travel). There could be an opportunity to capitalise on this and develop university cycling teams, targeting these Asian markets, similar to the successful programs run in the USA.

Another secondary market for consideration would be China, due to their second-place ranking in the Tourism Research Australia findings (Table 2, page 4), even though the majority of cycling undertaken by Chinese tourists is mainly incidental rather than a primary motivator for travel.

These markets are also identified by Tourism WA as key geographic target markets for general tourists, meaning marketing activities already in-market can be leveraged and more importantly targeted to specific niche markets around cycle tourism within these sectors. In terms of psychographic target markets those identified by Tourism WA also align perfectly with the characteristics of cycle tourists, being Dedicated Discoverers and Experience Seekers.

4.2 Destination Development

Cycle tourism is a multi-faceted industry which captures interest and provides benefits for a multitude of tourism sub-sectors. Cycle tourism is not purely about the promotion of cycling activities. It requires considered packaging with other tourism experiences as well as cycle facilities and infrastructure.

Table 15 Regional asset and Opportunities Assessmnet

<table>
<tr><th>REGION</th><th>ASSET/EXPERIENCES</th><th>OPPORTUNITIES</th></tr>
<tr><td>Experiences Perth</td><td>▪ Rottnest Island – bike riding exclusive tourism destination which is already catered for in terms of infrastructure and hire/transport facilities
▪ Good connectivity of towns in the Swan Valley and Avon Valley for road riding
▪ Mature food & wine industry – develop itineraries
▪ Increasing network of mountain bike trails catering for a wide range of rider capabilities
▪ Munda Biddi Trail
▪ Mediterranean climate – perfect for riding conditions
▪ Comprehensive event program featuring cycling</td><td rowspan="5">▪ Leverage promotion of Rottnest Island as one of Australia's best leisure bike riding destinations
▪ Create metro tourism cycle routes to improve accessibility for international (leisure and enthusiast markets)
▪ Development of itineraries for food and wine cycle tours in the Experience Perth and Australia's South West regions
▪ Development of itineraries for culture and heritage tours in all regions
▪ Promotion of bike packing and single day riding on the Munda Biddi Trail
▪ Leverage growth in bike packing/gravel market segments
▪ Leverage Tourism Australia's Aquatic & Coastal and Restaurant Australia campaigns
▪ Create events which showcase the state's iconic and diverse landscapes
▪ Support the development of bike hire/tour businesses
▪ Develop and implement a cycle friendly business/town program</td></tr>
<tr><td>Australia's South West</td><td>▪ Good connectivity of towns in the south west (particularly Margaret River Region, Southern Forests and Blackwood River Valley) for road riding
▪ ·Increasing network of mountain bike trails catering for a wide range of rider capabilities
▪ Munda Biddi Trail
▪ Mediterranean climate – perfect for riding conditions
▪ Comprehensive event program featuring cycling</td></tr>
<tr><td>Australia's Coral Coast</td><td>▪ Unique aquatic & coastal experiences
▪ Hosted accommodation at rural stations</td></tr>
<tr><td>Australia's Golden Outback</td><td>▪ Unique aboriginal experiences
▪ Hosted accommodation at rural stations
▪ Culture & History – aboriginal and mining history
▪ Goldfields Cyclassic</td></tr>
<tr><td>Australia's North West</td><td>▪ Favourable climate during dry season offers a winter riding alternative
▪ Unique aboriginal experiences
▪ Gibb River Road – long distance off-road/gravel bike packing experience
▪ Karijini National Park
▪ Culture & History</td></tr>
</table>

4.3 Infrastructure

Infrastructure is one of the most important aspects in providing a sustainable cycle tourism industry and delivering an exceptional experience. Regardless of the marketing undertaken and governance put in place, if there is no infrastructure for visitors there will be no sustainable industry. Ensuring there is well-planned, quality built and diligently maintained infrastructure guarantees great user experiences, ultimately building a network of cycle advocates; the greatest marketing tool any destination can have in place. The Regional Bicycle Network (RBN) Grants program makes funds available for the development and construction of cycling infrastructure by local governments in regional Western Australia (WA). Changes to the program in 2011/12 have placed a great emphasis on those projects which generate cycle tourism. Consideration should be given to creating a new program that focuses on the creation of cycle tourism focused routes and these grants should be assessed independently of transport focused ones. In addition, public transport connectivity and capacity needs addressing which enables transportation of bike equipment on public transport services. As a case in example; you can ride to Harvey on the Munda Biddi but bikes are not allowed on the train there.

In order for Western Australia to be competitive in the cycle tourism market there needs to be considerable investment in both hard and soft infrastructure. Responses to the 2017 National Cycling Survey also provided insights into what actions could be taken that would encourage bicycle riding. The most supported actions were all infrastructure related and included;

- More off-road paths and cycleways (66%) *
- Better connection between bike paths and schools (65%)
- More on-road bicycle lanes (61%) *
- More signs highlighting bicycle routes (59%) *
- Better connections between bike paths and shops (52%)
- Better connections between bike paths and parks and swimming pools (51%)

*cycle tourism related

A strategic approach to trail/route development which first prioritises projects (based on their ability to provide exceptional cycle experiences) and then assesses development capacity will ensure that growth can be achieved in a sustainable manner with the quickest possible returns.
The following is an overview of potential development areas;

- Extension of mountain bike trails in recognised potential development areas (such as those outlined in the South West Master Plan, Perth & Peel Master Plan).
- Development of an International Mountain Bike Association (IMBA) EPIC trail. The EPIC designation denotes a true backcountry riding experience—one that is technically and physically challenging, more than 80 percent single-track and at least 32 kilometres in length.
- Development of nationally and internationally accredited sports facilities which foster athlete development and cater for events
- Formalisation of iconic metropolitan and regional touring routes
- Development and promotion of safe road riding routes (with a sealed shoulder section on dual use roads)
- Development of a state cycling brand, which encapsulates all cycling disciplines
- Development of a unified approach to signage and wayfinding
- Bike hire/loan facilities – could potentially include a Park Connector System similar to that available in Singapore for the Perth/Fremantle/Hillarys areas (check-in/check-out) bike hire system.

4.4 Events

Events are a key tool in promotion of a destination and raising its profile amongst cycling enthusiasts and general spectators. Events are also an instrument in driving infrastructure and asset development as well and providing long lasting benefits for local communities. It is an important thought when investing in events to ensure they have a unique positioning proposition for participants and have the power for storytelling. There are a number of opportunities in the event market including;

- Develop an overarching 5 to 10 year events strategy for cycling
- Developing an event application assessment criteria aligned to an overarching, long term strategy for cycle tourism
- Funding and development of events that focus where possible on the extraordinary experiences which complement the event, such as pre and post event touring, and events set against backdrops of iconic landscapes.
- Securing a Union Cycliste Internationale (UCI) accredited events for mountain biking, road and BMX
- Development of a world cycling tour which focuses on emerging markets (ie women's cycling)
- Development of a nationally renowned recreational event that showcases Western Australia as a cycling destination.


Image source: WestCycle

4.5 Marketing

There is significant opportunity around marketing to drive the growth of the cycle tourism market. Capitalising on Western Australia's unique experiences and landscapes and proximity to Asian markets, marketing should focus on emerging markets and itineraries and packaging.

4.5.1 Emerging Markets

There has been a noted diversification of the cycle tourism market in recent years, beyond just user cohorts and cycle types. Strong market growth of the sector has reached all aspects of the community. Opportunities exist for Western Australia to target these emerging markets and position itself strongly in the industry. These emerging markets include;

- Growth of female participation in cycling: there is increasing popularity of women's only cycling groups, tours and events
- Increased popularity through Asian markets: WA is well suited geographically and climatically to capitalise on this; and has strong connections with Free Independent Travellers (FIT) and student tourism markets (both secondary and tertiary education)
- Emerging trends: bike packing, gravel, eBikes

Image source: WestCycle

4.5.2 Itineraries & Packaging (Product)

As cycle tourism is still an emerging market in WA, packaging and the development of travel itineraries will be vitally important in educating and growing this segment. Studies undertaken by Tourism WA into awareness of WA locations on the east coast has shown that although awareness of WA is sound, knowledge of the destinations within WA is limited. East coast markets are still relatively unfamiliar with travel logistics, locations of iconic destinations and the breadth of product offering. Itineraries and packaging are important as both booking and educational tools. Although someone might not book a package, promotion of that package through various channels increases awareness of the product offering; including how to get there, where to stay, how long to stay and what other activities/experiences are available at the destination.

4.5.2.1 Itineraries

Itineraries will be vital in explaining cycle opportunities with Western Australia, along with travel time, points of interest and complimentary experiences. They are a great resource for FIT and group visitors alike. Itineraries need to be developed which give consideration to;

- Multi-day journeys
- Packaged with other key experiences
- Iconic landscapes
- Regional dispersal

4.5.2.2 Packaging

Packaging with other experiences is vital due to the tendency of cycle tourists to engage in a broad range of activities/pursuits/interests whilst in a location. They are also high return visitors who will be easily influenced to explore areas off the beaten track. Packages should be focused around the following themes;

- Adventure & Outdoors
- Food & Wine
- Culture & History

4.6 Athlete Development

Over recent years there has been a number of high profile Western Australian riders across all disciplines who have competed on the world stage, including but not limited to Lauren Reynolds (BMX - Olympian), Sam Hill (Mountain Bike – three-time UCI world downhill champion), Cameron Meyer, Travis Meyer and Luke Durbridge (road cycling), and Sam Welsford (Track Cycling). High profile athletes have the ability to be used as advocates/ambassadors for WA's cycle tourism offering. Investment in infrastructure and the facilities to nurture talent however is vital. High profile athletes become valuable tools in marketing activities as they are able to reach and converse with the professional and enthusiast sectors of the industry. In addition, this program could be expanded through the development of high school and university cycling teams that would attract local and international (predominantly Asian) student attendance.

05 IMPLEMENTATION & NEXT STEPS

Image source: Stewart Lombard

This strategy identifies four priority areas that require consideration and development to support the growth of cycle tourism in Western Australia; investing in the industry, marketing and events, and delivering a great cycling experience.

According to research commissioned by the RAC WA, investment in high-standard cycling infrastructure, supported by programs to encourage cycling, will generate total community benefits (including strategic, health, economic and environmental) of at least 3.4 times the costs incurred[24].

As the peak cycling body in Western Australia, WestCycle have been instrumental in achieving coordination between all state government agencies involved in cycling and the WA cycling community. Moving forward WestCycle will continue to be the driving body behind this strategy and it is imperative that resources are allocated accordingly (with the requirement initially for one FTE) to realise the full potential of cycle tourism in Western Australia.

5.1 Criteria to Assess Priorities

Outlined in the following pages is an extensive list of actions. In order to sustain strategic development which gives consideration to funding and resourcing restrictions these actions need to be assessed according to a prioritisation framework. An independent assessment of these actions needs to be undertaken to allocate importance, however should take into consideration the following;

1. Activities which raise awareness of the destination
2. Those activities which encourage and support dispersal to regional areas
3. Those markets and user cohorts who will provide the greatest return in the shortest time

5.2 PRIORITY AREAS

PRIORITY AREA 1: CREATING A BIKE RIDING CULTURE

A sustainable cycle tourism industry requires good management models, a comprehensive understanding of the market and a governance hierarchy with clear responsibility.

AREA		ACTION	
1.1	Research	1.1.1	Undertake dedicated research into the cycle tourism market in Western Australia giving consideration to market segmentation, motivations, market potential and destinatio awareness
		1.1.2	Include segmentation criteria (primary versus secondary activity) in visitor surveys
		1.1.3	Monitor use of the trails/cycle routes on a regular basis
1.2	Governance	1.2.1	State Government understanding of the economic benefits of cycle tourism
		1.2.2	Greater collaboration between Government Departments on cycle tourism with a clear lead department
		1.2.3	Work with local government authorities to identify all existing cycle infrastructure, what should be retained and outline any gaps
		1.2.4	Develop a prioritisation framework for the development cycle facilities
		1.2.5	Engage with all bike riding groups in Western Australia to develop strategic partnerships and unified investment in this strategy
		1.2.6	Facilitate the development of strategies, plans and policies that recognise and cycle tourism at state, regional and local level
1.3	Legislation	1.3.1	Work with local and state government to develop legislation that makes cycle tourism safer
		1.3.2	Provision for rolling road closures to facilitate road riding events
		1.3.3	Provision for police to commit support to events
1.4	Community	1.4.1	Change the public dialogue to be more accepting of bike riding (such as road usage respect programs), including education of riders on road usage courtesy/consideration
		1.4.2	Communicate the ROI benefits of bike riding to the wider community

PRIORITY AREA 2: MARKETING

Cycle tourism is a niche market and provides the ability to target marketing activities to attract a higher yield visitor market. A comprehensive marketing strategy would ensure competitiveness in the marketplace.

AREA		ACTION	
2.1	**Strategy**	2.1.1	Maintain key Tourism WA and marketing representation on the Trails Reference Group and Trails Network Group
		2.1.2	Develop a cycle tourism marketing strategy for implementation by key state, regional and local marketing organisations
		2.1.3	Develop a cycle tourism brand and central depository of information (website) for Western Australia which can sit above any existing brands for the different cycle types
2.2	**Content (editorial and imagery)**	2.2.1	Invest in the creation of cycle tourism content that can be repurposed through all tourism/ marketing channels (including but not limited to Tourism WA and Tourism Australia as priorities)
		2.2.2	Provide consistent online cycle touring information via the region's main tourism promotional websites
		2.2.3	Capture imagery which positions cycle trails/routes against WA's unique landscapes
		2.2.4	Develop content which promotes multi-day (including long stay) itineraries and packages
2.3	**Itineraries**	2.3.1	Develop a range of multi-day itineraries which demonstrate how to experience cycle tourism in WA (including travel distances, times, complementary experiences)
		2.3.2	Incorporate itineraries which encourage regional dispersal and off-the-beaten-track experiences (enthusiast cycle tourism market)
		2.3.3	Incorporate itineraries which radiate from metropolitan or iconic regional centres and incorporate easy/beginner pathways (leisure cycle tourism market)
2.4	**Packages**	2.4.1	Develop packages based on the key themes identified; · Adventure & Outdoors · Food & Wine · Culture & History
		2.4.2	Develop packages which incorporate bike riding activities and provide flexibility (for FIT travellers) or all-inclusive (for the group market)
		2.4.3	Develop packages with east coast and key international trade partners to increase promotion and awareness within source markets.
		2.4.4	Investigate opportunities to leverage the student tourism market (both secondary and tertiary) through the development of high school/university cycling teams

PRIORITY AREA 3: EVENTS

The successful development of a comprehensive events calendar is crucial to raising the profile of Western Australia as a cycle tourism destination. Events attract visitors who may not have otherwise travelled to WA, and are also an instrument in driving infrastructure and asset development.

AREA		ACTION	
3.1	**Events**	3.1.1	Develop a 5 to 10 year event calendar and strategy to target key events to bid for
		3.1.2	Develop an event assessment criteria to determine which events should receive funding from Tourism WA to ensure they also address the longer term strategic focuses of cycle tourism.
		3.1.3	Attract investment into an event on the Munda Biddi Trail that receives global recognition
		3.1.4	Develop the event workforce and volunteer network to ensure capacity to deliver and officiate local, state, national and international events
		3.1.5	Deliver venues with trails and associated infrastructure capable of hosting UCI-sanctioned national and international events
		3.1.6	Continue to support cycling events aimed at the tourism market
		3.1.7	Develop event themed itineraries which promote post-event cycling experiences that don't have restrictions around land access

PRIORITY AREA 4: DELIVERY OF THE RIGHT EXPERIENCE

It is vitally important that once the investment and marketing has been delivered that the end user experience matches or exceeds their expectation.

AREA		ACTION	
4.1	**Infrastructure**	4.1.1	Investment should focus on those areas which close the loop on existing trails/routes to create comprehensive networks in iconic locations (metropolitan and regional)
		4.1.2	Continue investment in Recreational Shared Paths (RSP's), tourism routes, and the Regional Bicycle Network Plan with consideration for tourism and not just transport.
		4.1.3	Development of road cycle routes that are considerate of cyclist safety, unique landscapes and connectivity to townships
		4.1.4	Pursue possibilities surrounding the development of an IMBA certified EPIC trail (and possible ride centre) in WA
		4.1.5	Pursue possibilities surrounding the development facilities which could support a UCI sanctioned event
		4.1.6	Investigate suitable management models for trail/route maintenance
		4.1.7	Develop a touring route signage system and hierarchy
		4.1.8	Develop a state-wide network of national, regional and local mountain bike facilities which highlight unique and iconic landscapes and are considerate of identified trail models
		4.1.9	Construct a UCI level BMX facility with a dual ramp system (5 metre and 8 metre ramps)
		4.1.10	Enable public transport connectivity and capacity for cycle users
4.2	**Education and Training**	4.2.1	Develop a discipline wide cycle friendly business program; to connect cyclists with businesses which provide facilities (including safe bicycle storage, water, cycle relevant information), to make their stay more enjoyable and aid them on their journey.
		4.2.2	Provide training on how businesses/towns/destinations can become cycle-friendly (consideration to be given to the program currently under development for the Munda Biddi Trail and how this can be extended across WA)
		4.2.3	Develop an online guideline which outlines how to become 'cycle ready'
		4.2.4	Quantify and advocate the benefits, value and business potential of cycling
		4.2.5	Support the development of cycle related businesses (bike hire, bike tours), and invest in training for cycle guides
		4.2.6	Support and empower groups that maintain trail networks, through assisting with training, tools, advice and support for trail development and maintenance.
4.3	**Wayfinding and signage**	4.3.1	Improve signage on roads and in parks and reserves to make cycling networks and parks easier to find.
		4.3.2	Utilise state cycle brand strategy to ensure consistency through all signage
4.4	**Safe Cycling**	4.4.1	Develop key road and touring routes with extended road shoulders, passing lanes and traffic warning signs.
		4.4.2	Ensure community recognition and understanding of these routes through community education programs
4.5	**Current Providers**	4.5.1	Conduct audit of current providers within the cycle tourism space.

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