Denmark Trails Hub
Project Assessment

Prepared for
Department of Sport and Recreation

Presented 8 September 2014 by
nbd marketing

Government of **Western Australia**
Department of **Sport and Recreation**

Index

1. Introduction

The Department of Sport and Recreation appointed Jenny Nichol of NBD Marketing to ascertain the development potential for Denmark as a Trails Hub. In particular this project assessed the potential for Denmark to be a successful trails hub using the tools that were developed in 2012 for the World Class Trails Hub Strategy,

Project Outline

1. Meeting with DSR to update on Trail Hub status

2. Background research

3. Tourism Analysis

4. Site visit and town audit

5. Capacity Audit

6. Meetings-   Visitor Centre Manager
                     DPaW

7. Community Workshop

8. Completion of Inventory and Assessment checklist

9. Development of Action Plan – including discussions and Amendments

Project Site

Denmark's trails hub 'offering' constitutes the whole town and surrounding forests and natural landscapes. The Trails Hub Assessment was undertaken to ascertain the readiness of this entire landscape envelope to meet the needs of a trails hub.

2.   Tourism Analysis

The Nature of the Tourism Industry in the Shire of Denmark, WA

Introduction

Of the estimated 1,993,700 visitors to Australia's South West in 2012, 108,200 (5%) visit Denmark Shire. Denmark is therefore a relatively small tourism destination compared to the more high profile destinations within the South West region, such as Busselton, Margaret River and Albany.[1]

Of interest, 9% of all visitors to Denmark are international visitors whereas only 5% of all visitors to Australia's South West are international visitors. While the difference may not be significant, it could indicate that Denmark has a greater 'pulling power' for international visitors when compared to visitation overall to Australia's South West (or alternatively it could indicate that domestic visitors tend to visit other locations in Australia's South West before they visit Denmark). The difference is noteworthy, indicating perhaps that Denmark holds a different appeal to other locations in Australia's South West[2].

Visitor Profile

There are 98,300 domestic visitors to Denmark each year comprising 92,300 intrastate visitors (85%).[3]. Another 9500 international visitors visit Denmark. Visitor nights information is not available due to the small sample size in the research.

Not surprisingly 88% of international visitors are visiting for holiday and leisure, with only 9% visiting friend and relatives. This compares to 73% of domestic visitors being for holiday and leisure and 20% visiting friends and relatives. A greater proportion of both domestic and international visitors to Denmark are there for holiday and leisure purposes, compared with domestic (around 60%) and international visitors (78%) to the whole of Australia's South West.   This might indicate the reputation of Denmark as an attractive holiday destination amongst a small but informed market, compared to other South West destinations where a greater proportion of visitors are visiting friends and relatives.

A majority of domestic visitors are in the 25-44 (48%) and 45-64 years (28%) age groups. International visitors are slightly older with 33% being 45-64 years and 36% 25-44 years. International visitors are mainly travelling alone (43%) or adult couples (39%) whereas domestic visitors are predominantly adult couples (35%) with 30% travelling with friends and relatives and another 23% travelling in family groups.

Occupancy and Seasonality

Peak season in Denmark is currently January followed by February. Shoulder months are November, December, March and April. The lowest months are August and July. May and June are shoulder-slow seasons.

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[1] Source: Tourism Western Australia, Australia's South West Overnight Visitor Fact Sheet YE 2012

[2] Tourism Western Australia. Australia's South West Overnight Visitor Fact Sheet Years Ending 2012 and Tourism Western Australia, Shire of Denmark, Overnight Visitor Fact Sheet Years Ending December 2012

[3] Tourism Western Australia. Shire of Denmark. Overnight Visitor Fact Sheet Years Ending December 2009/10/11

According to the TWA Fact Sheet for the Shire of Denmark, hotels, motels and serviced apartments with 15 or more rooms had an average annual occupancy of 56% in 2011, as is illustrated in the following graph. This may be an improvement on recent years although the survey methodology has also changed. Seasonality for Denmark appears to be affected by school holiday periods and favourable weather conditions.
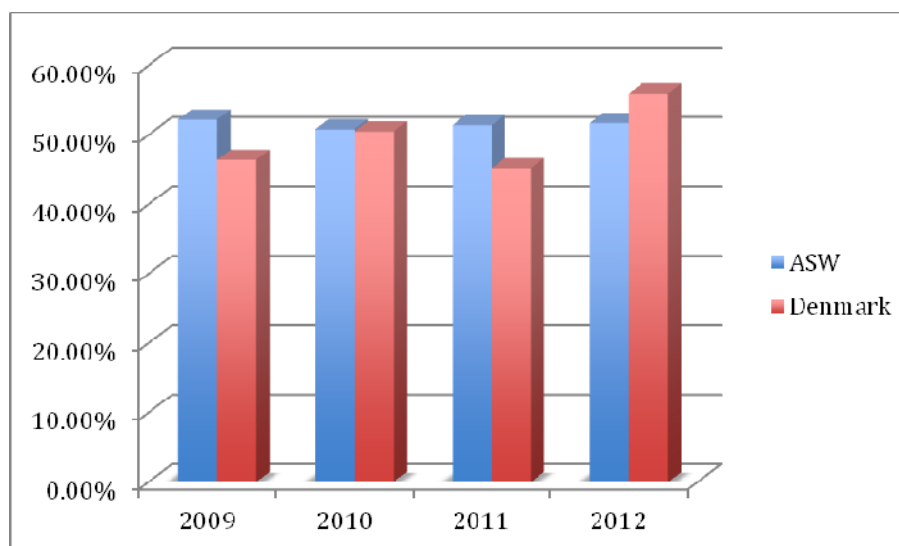
Source: ABS, Survey of Tourist Accommodation, in TWA Overnight Visitor Fact Sheet, Shire of Denmark YE Dec 09/10/11

Profile of Visitors to Denmark

Visitor Origin	No of Visitors *(3 year average)*	Visitor Nights *(3 year average)*	Demographic	Purpose	Travel Party	Accommodation *(Top 3)*
Domestic	98,300 91%	350,700 average length of stay 3.8 nights	Male 55 % Female 45% 15-24- 9% 25-44- 48% 45-64- 28% 65+- 14%	Holiday/leisure 73% VFR 20% Business 5% Other 2%	Adult Couple 35% Friends/relatives 30% Family 23% Solo 10% Other 1%	Friends or Relatives' property 26% Caravan 22% Hotel, motel, resort 16%
International	9,500 9%	NA	Male 49% Female 51% 15-24- 9% 25-44- 48% 45-64-28% 65+- 14%	Holiday/leisure 88% VFR 9% Other -3%	Solo 43% Adult couple 39% Friends/relatives 10% Family 7%	Caravan 36% Hotel, Motel or Resort 20% Rented house, apartment, flat, unit 15%

Source: Tourism Western Australia. Shire of Denmark Overnight Visitor Fact Sheet Years Ending 2009/10/11

3.   Capacity Audit

Essential		Desirable	
1. Natural attractions and features of local, state or national significance, such as parks and reserves.	Yes	Themed trails or tours – either guided or defined with signs, brochures or audio methods.	Gap
2. A critical mass of established walking, cycling, equestrian, drive or water based trail network, including looped trails and Nationally significant linking trails appealing to a range of user types. Trails are mapped, signed, and well serviced (unless a social trail network)	Yes	A range of activities and products promoted to tourists.	Yes
2. Linkages between trails, clear access to trails from hub.	Need investigating		
2. Signage (directional and Informational), interpretation and education – community news, static information panels, interpretive trails? And access to routes.	Gap		
3. Facilities geared for trail users such as bike racks, storage for backpacks, bike wash facilities, showers, bike lockers, repair stands, secure parking.	Gap	Sites of cultural interest or significance.	Yes
3. Access via established highway network from major population centres.	Yes	Established long distance cycle, river or walking trails, such as the Bibbulmun Track.	Yes,
3. Public transport access – scheduled bus, trail or boat service including transport for trail equipment.	Yes but more needed	Health services - clinic, hospital, doctor, nursing centre.	Yes
3. Staffed visitor centre or major information hub in a central location providing trail, tour, accommodation and transport information/booking services 7 days per week.	Yes	Secure facilities for visitor's bikes, cars and left luggage. Tour companies providing packaged tour options, transport, drop off, equipment and transport.	Some. More needed
3. Support services such as a bank, laundry, pharmacy and grocery, atm.	Yes	Distinctive setting with unique or unusual landform, vegetation or water forms.	Yes
3. Public toilets, showers, car parking in central location.	Yes	Organised tours, festivals, events or guided activities for adults, children, families and tourists with a trails focus.	Gap
3. Supply and service suppliers for target user groups – hikers, cyclists, motor-bikers, horse riders such as sport equipment sales, repair services, hire and emergency support.	Yes but Gaps	Transport services such as fuel, maintenance and auto supply.	Yes
3. A range of 'trail friendly' accommodation styles and price meeting the needs of the target market, such as caravan/camping, bunkhouse, home stay, motel, hotel, chalet and hostel.	Yes		
3. Food services – restaurants, cafes and other providers available 7 days, day and night.	Yes but opening hours issue		
4. Comprehensive strategic, governance and operations plan including initial and on-going funding for management.	Yes but Gaps	Year around appeal with few seasonal or climatic that could negatively impact on trail activities.	Yes
4. Maintenance and upgrade program that supports hub activities/services and designed to meet target market needs.	Needs investigating	Focus on sites, features and activities that complement the natural attributes of the hub, such as peacefulness, remoteness,	Yes

		uniqueness or wildness.	
4. Broad community support, preferably with a formalised supporter group, such as a mountain bike club.	Needs investigating	Source of volunteers for maintenance and trail support.	Needs investigating
4. A formalised committee responsible for governance, marketing, funding, promotion, provider integration, trail development and maintenance.	Needs investigating		
4. Support from key local and state government agencies.	Yes		
5. Evidence of business engagement with the Trail Hub concept.	Yes but more work needed	Business engagement program such as Cycle Friendly Business accreditation.	Yes
6. Effective integrated marketing strategy, including branding, website, brochures, trail guides and maps.	Gap	Capacity to leverage brand for income generation	Gap

Situation Assessment

The Shire of Denmark provides a range of tourism attractions and services for trails tourists including the "Cycle Friendly Businesses" accredited through the Munda Biddi Trail Foundation. Denmark also has an active tourism industry coordinated through Denmark Tourism Limited.

Denmark appears to be a niche tourism destination for the well informed consumer, and a range of trails tourism experiences have the potential to be a very good complement to this.

Trails tourism has the potential to extend the tourist stay, expand the attractiveness of the destination to new target markets and extend the season into the cooler months as, for example, cycle tourists in particular prefer Spring, Winter and Autumn to summer.

4.   Inventory Assessment Checklist

Setting and landscape	Priority	Current Status	Measure	Comments and Assessment	Maximum possible score
Attractive landform – valley, rolling, undulating, sense of uniqueness?	4	3	12		12
Presence of water features - creeks, rivers, lakes, reservoirs?	4	3	12		12
Lack of seasonal or climatic events that could influence site suitability - storms, cyclones, winds, sun exposure?	4	2.5	10		12
Unique or unusual natural setting?	4	2.8	11.2		12
Attractive vegetation association - species, structure, patterns, density?	2	2.5	5		6
Score			50.2	93%	54

Cultural Factors	Priority	Current Status	Measure	Comments and Assessment	Maximum possible score
Sites of cultural interest or significance?	3	1.5	4.5	Need further identification of culturally significant sites - old stock routes; camps; rail trails?	9
Traditional owners active in local area visitor/recreation planning and management?	2	1	2	No apparent Indigenous involvement. Need to identify Aboriginal heritage sites.	6
Score			6.5	43%	15

Aesthetic Factors – Hub Town	Priority	Current Status	Measure	Comments and Assessment	Maximum possible score
Noise intrusion from roads, utilities or aircraft?	4	2.5	10		12
Sense of peacefulness, remoteness, uniqueness	4	3	12		12

or naturalness, vastness?					
Significant visual values?	**4**	**3**	**12**		12
Sites or special features of awe, mystery or contemplation due to the setting or component visual elements?	**3**	**3**	**9**		9
Inspirational places/features that demand or encourage exploration or personal discovery?	**3**	**2.5**	**7.5**	Further opps to develop trails in some unique areas.	9
Lack of discordant visual elements – architecture, industry, rubbish tips, etc?	**3**	**3**	**9**		9
Score			**59.5**	**94%**	**63**

Existing tracks and trails	Priority	Current Status	Measure	Comments and Assessment	Maximum possible score
Established walking trails of local, regional or state significance?	**5**	**3**	**15**	needs an audit of what's there, grade, quality, potential etc	15
Designated canoe/kayak trails?	**5**	**2**	**10**	opp to promote, brand these. And develop more	15
Established mountain bike trails of different grades?	**5**	**1**	**5**	lack of dedicated MTB park accessible to town and dedicated challenging MTB trails. Lack of grading on existing trails- including Munda Biddi.	15
Critical mass of looped trails	**5**	**1.5**	**7.5**	needs investigation.	15
Trails effectively identified and signed?	**5**	**1.5**	**7.5**	Need to investigate on site trail head mapping, wayfinding. Also investigate signage to reduce user conflict and change expectations in multi use trails.	15

Trails effectively mapped?	5	1.5	7.5	Need uploading to TWA. Need to audit hardcopy mapping and identify gaps and opportunities	15
Facilities for trail users- parking, toilets	5	2	10	Parking ok. New site at river good potential	15
Trails of suitable standard/quality?	5	2	10	needs audit to identify multi use, single use, grading, challenge. Identify and communicate consistent grading classification standards	15
Critical mass of 1 type or of a mixed type of trail?	5	1.5	7.5	Mixed. Needs more mtb trails and others (aquatic?, equestrian?). Needs audit to determine right mix and master plan to ensure connections to major attractions.	15
Provision and encouragement of road biking?	4	1.5	6	not well developed	12
Established equestrian trails?	4	1.5	6	Potential for more of this, including loops/links. Opportunity to develop Equestrian centre?	12
Designated motorbike trails/areas?	4	1	4	needs investigation	12
Designated drive trails (road or 4wd)?	4	1.5	6	Potential for more of this.	12
Special themed trails or tours such as heritage, agriculture, industrial, wildlife, fishing, craft or wine?	4	1.5	6	Potential for more of this.	12
Water based tours or cruises – boat, canoe, kayak?	3	1.5	4.5	Potential for more of this- inlet tours, self guided canoe tours, Hay River?	9
Organised tours – self guided or tag along?	3	2	6	Potential for more of this.	9
Dive or snorkel trails?	2	3	6	not appropriate	6

Score			124.5	57%	219

Access	Priority	Current Status	Measure	Comments and Assessment	Maximum possible score
Sealed highway from major population centres into trails hub town?	5	3	15		15
Scheduled public transport service [bus or train]?	5	2	10	Second daily bus service from Albany?	15
Availability of good maps and travel information – online and brochure formats?	5	1.5	7.5	Visitor Guide only source	15
Availability of transport services – fuel, maintenance and supply?	5	2.5	12.5	Availability of taxis to pick up drop off could be promoted.	15
Access to routes, signed, promoted, safe	5	2	10	Needs auditing. Good base	15
Long distance cycle or walking trails? Bibbulmun Track? Munda Biddi?	4	3	12		12
Scheduled or charter air services?	3	3	9	Close enough to Albany	9
Score			55	57%	96

Attractions (and Product)	Priority	Current Status	Measure	Comments and Assessment	Maximum possible score
Natural attractions and features of significance?	5	3	15		15
Natural attractions and features of significance within a half day distance?	5	3	15		15
Natural attractions and features of significance within one day distance?	4	3	12		12
Tourist offerings- product for tourists	4	3	12		12
Score			54	100%	54

Services and Amenities	Priority	Current Status	Measure	Comments and Assessment	Maximum possible score
Staffed visitor centre or information hub in a central location with maps and trail information available 7 days/week.	5	3	15		15
Signage (directional and Informational), interpretation and education – community news, static information panels, interpretive trails?	5	1.5	7.5	Opportunity for more interpretive trails and interpretation information on existing trails and signage assessment	15
Services geared for trail users: Eg bike racks for cyclists, storage for backpacks, bike wash facilities, bike lockers, repair stands?	5	1.5	7.5	Being developed at river site. Some at VC. Needs auditing and assessment. More bike racks needed? Connection between trails, user, caravan parks, town?	15
Support services – laundry, pharmacy, grocery, internet café, ATM?	5	3	15		15
Public toilets	5	3	15		15
Car parking facilities	5	2.5	12.5	needs auditing and assessment- for all user types including equestrian float access.	15
Health services - clinic, hospital, doctor, nursing centre, ambulance depot?	4	3	12		12
Public facilities nearby?	4	3	12		12
Public Showers	3	2	6	is this being included at river site?	9
Score			102.5	83%	123

Accommodation	Priority	Current Status	Measure	Comments and Assessment	Maximum possible score
A range of accommodation styles and prices meeting needs of target market – caravan / camping, bunkhouse, home stay, motel, hotel, chalet, hostel?	5	3	15		15
Trail friendly accommodation providers?	4	2	8	Developed through MBTF CFB program. Needs revitalisation. Opportunity to develop overnight equestrian services?	12
Score			23	85%	27

Activities	Priority	Current Status	Measure	Comments and Assessment	Maximum possible score
Organised tours or guided activities for adults, children, families, tourists?	5	3	15		15
Specialist services – local crafts, local produce, gifts, souvenirs?	3	3	9		9
Festivals and 'athletic challenges' of local, state or national attraction?	3	1.5	4.5	Opportunity- athletic mtb event/race including on local mtb park?	9
Annual (or otherwise) events linked to Trails Hub theme?	3	1	3	Opportunity- annual trail walking event or event linked to trail hub theme?	9
Score			31.5	75%	42

| Planning Factors	Priority	Current Status	Measure	Comments and Assessment	Maximum possible score
Established or proposed strategic or management plans that support hub activities/services?	5	2	10	DPaW supports a range of recreational uses.	15
Compatibility with established land uses?	5	2.5	12.5		15

Support from key local and state government agencies?	**5**	**2.5**	**12.5**	Good support from DEC, DSR and Shire	15
Score			**35**	**78%**	**45**

Organisation and Management	Priority	Current Status	Measure	Comments and Assessment	Maximum possible score
Existence of formalised organising coordinating committee for trail hub (can be same as supporter group)?	**5**	**1**	**5**	Priority if broader community objectives are to be achieved. DPAW; Good relshp with Walpole VC but not so good at Denmark.	15
Existence of formalised trail management schedule/agenda?	**5**	**0.5**	**2.5**	Priority if broader community objectives are the be achieved.	15
Known sources of financial support?	**5**	**1.5**	**7.5**	Trail maintenance and business engagement need some focus.	15
Existence or potential for agreement regarding responsibility for hub trails construction, maintenance and management?	**4**	**1.5**	**6**	Role of Clubs/Community members- MTB, Walk, Horse to take role of trail manager. Could be good from community development perspective?	12
Evidence of trail group cooperation and effective trail maintenance?	**4**	**1.5**	**6**	Apparent good cooperation for river site development. Needs further work	12
Score			**27**	**39%**	**69**

Community Engagement	Priority	Current Status	Measure	Comments and Assessment	Maximum possible score
Community support?	**5**	**2**	**10**	Strong support from educated community members. Needs wider spread to business tourism	15

|				community	
Existence of formalised supporter group (eg Mountain bike club) to provide source of volunteers & passionate leaders/influencers?	**5**	**2**	**10**	PATAC good start	15
Score			**20**	**67%**	**30**

Engagement of Supporting Businesses	Priority	Current Status	Measure	Comments and Assessment	Maximum possible score
Evidence of business engagement with the Trail Hub concept and trail user markets?	**5**	**1**	**5**	Some from MBTF CFB program but this has subsided. Needs awareness raising strategy.	15
Food services – restaurants, cafes and other providers? Open 7 days? Providing night-time meals? Provision of food suitable for trail users?	**5**	**2**	**10**	Opening hours questioned	15
Supply and service suppliers for target user groups – hikers, cyclers, motor-bikers, horse riders, canoeists? Eg. gear sales, repair services, equipment hire, emergency support.	**5**	**1.5**	**7.5**	To be developed. Needs support of wider business community.	15
Tour operators offering packages to suit trail users?	**4**	**2**	**8**	This could be developed down the track.	12
Tour companies providing transport, drop off and equipment (bike, backpack?) transport onto trails and from point of departure?	**4**	**1.5**	**6**	This could be developed and should be a focus of the business engagement process.	12
Secure parking facilities for bikes, cars? Secure storage?	**4**	**1**	**4**	This could be part of the river site development	12
Score			**40.5**	**50%**	**81**
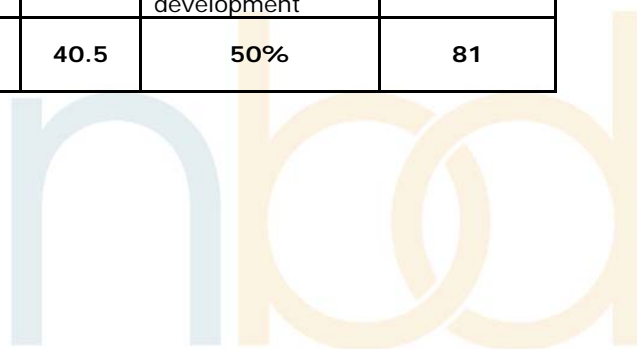
Marketing	Priority	Current Status	Measure	Comments and Assessment	Maximum possible score
Existence of suitable promotional material, pre-visit pamphlets and maps?	4	1.5	6	Visitor Guide very good. More trails information needed. Opportunity to develop Season Calendar, QR codes?	12
Evidence of identification and understanding of target market and communication methods?	4	1.5	6	dedicated trails tourism focus needed	12
Deliberate planning of trail and visitor services to meet target market needs?	5	1.5	7.5	Opportunity to plan new trails and trail hub to target specific users.	15
Effective marketing strategy, including branding, website, appropriate promotional maps and communication modes?	5	1	5	This to be developed. Needs wider engagement from town community, business community etc.	15
Score			**24.5**	**45%**	**54**

Brand	Priority	Current Status	Measure	Comments and Assessment	Maximum possible score
Existence of a well established trails-linked brand?	5	1	5	This to be developed. Needs wider engagement from town community, business community etc.	15
Capacity to leverage brand	5	1	5	This to be developed. Needs wider engagement from town community, business community etc.	15
Score			**10**	**33%**	**30**

Inventory Assessment Checklist Results- Spider Graph Analysis

TRAILS HUB TOWN INVENTORY ASSESSMENT SCORES
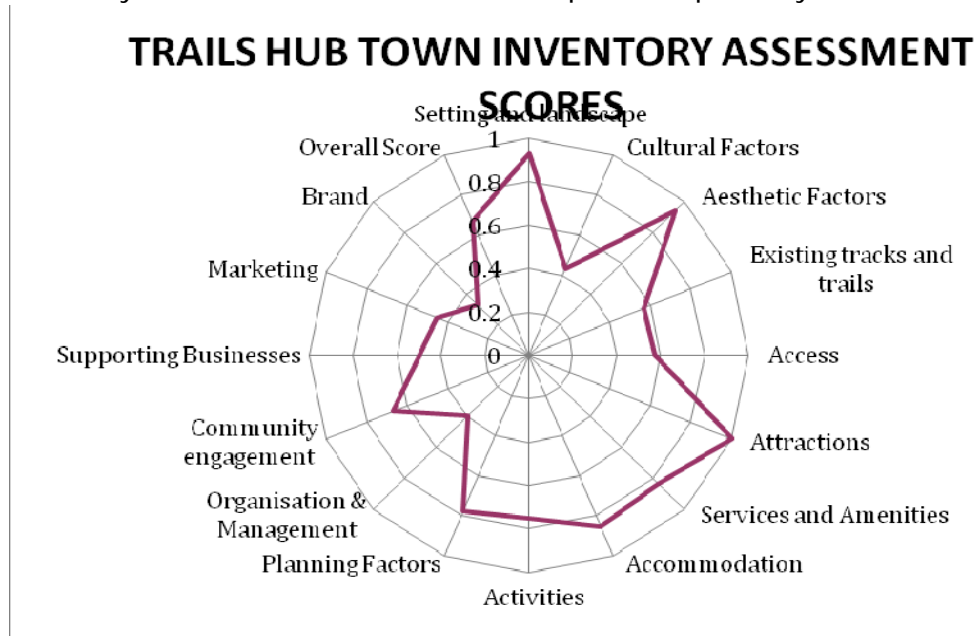
When reading the Spider Graph Analysis, the closer a score is to the outer edges of the circle, then the closer Denmark is to being well provisioned in this area.   Areas for improvement are closer to the centre of the circle.

In summary, the spider graph reflects that Denmark has strengths in that it is an established tourist destination with a suitable capacity in accommodation, services and attractions to support growth in tourists.   It also has a very suitable landscape and aesthetic factors which make it ideal for developing a specialised trails destination. There are opportunities for improvement, which if implemented will position Denmark well to being a unique trails hub in WA.

5.   Recommendations

Overall Denmark presents a very good case to become a trails hub. Most of the basic 'hardware' and supporting infrastructure are in place including a well established tourist destination, a well known name, a beautiful setting and a good basis of trails and tourist infrastructure. Relative to other destinations, it is a comparatively simple exercise to lift this currently popular destination into the realm of 'trails tourism'.

Hence overall the town is well resourced to become a trails hub, and this assessment was undertaken to identify what steps to take next. The assessment identified that some improvement is needed in both the 'software' and the 'hardware' of the trails network.

Hardware improvement is required in the trails offering in the areas of:
1. Auditing existing trails to understand status of current supply, mapping, signage, parking, access and connections between the trails and the hub area.
2. Developing a strategy to identify desired user groups and develop a critical mass of trails to meet desired user needs and make further recommendations for mapping, signage, parking, access and connections between the trails and the hub area.

The 'software' improvements include a focus on :
1. Formalising the involvement of community groups and agencies in the trail maintenance roles.
2. Business engagement with the trails and trail users, to result in the development and provision of trail user services.
3. Working together- community, local users, trails groups, environmental groups, businesses and business groups to jointly brand and promote Denmark as a trails destination. This could also lead to all trails being similarly branded and signed.
4. Branding and promotion of Denmark as a trails destination and development of marketing collateral to enhance this brand.
5. Cooperative marketing initiatives on behalf of trail businesses.
6. Ongoing promotion of the benefits of trails for community and economy so that ongoing funding is secured to build and maintain trails.

The following table details the assessment across all the criteria included in the Inventory Assessment Framework.

Assessment

Cultural Factors

Issue	Opportunity	Recommendation	Responsibility	Priority
Sites of cultural heritage or significants	Improve interpretive trails and material – mapped trails, signage, online.	Investigate cultural heritage sites and heritage stories. Develop plans for appropriate interpretive trails and signage on existing trails	PATAC/New committee	Low
Engagement with local indigenous stakeholders and specifically local indigenous tour operators.	No apparent involvement	Investigate indigenous cultural heritage sites and heritage stories.	PATAC/New committee	Low

Aesthetic Factors

Issue	Opportunity	Recommendation	Responsibility	Priority
Inspirational features that demand personal discovery	Some unique features could be further appreciated through appropriate trail development –including water /mountain features.	Undertake trail audit and incorporate landscape values assessment to identify gaps where unique landscapes could be further interpreted/experienced through trails	Shire	High

Access

Issue	Opportunity	Recommendation	Responsibility	Priority
Public transport	Bus service from Albany increased?	Research needed to determine demand.	Shire/Tourism Association	Low
Pick up Drop off	Taxis could promote this service	Chamber of commerce could promote this opportunity.	CCI	Medium

Existing Tracks and Trails

Issue	Opportunity	Recommendation	Responsibility	Priority
Established trails- Trail	Need audit of existing trails, user types,	Trail Audit.	Shire/PATAC	High

identification and signage, mapping	gaps, opportunities, signage, demand and use levels, loops, linkages, gaps, grade, classification. Also investigate signage to reduce user conflict and change expectations in multi use trails.	Develop Standardized track classification like ski fields. Upload trails to Trails WA. Develop signage strategy to optimise trail use, promote wayfinding, and reduce user conflicts.	Trails WA PATAC/new committee Shire	
Kayak, mountain bike, equestrian, motor bike trails	There are gaps in supply of trails to meet some user groups- mountain biking (including dedicated MTB park **and** dedicated challenging MTB trails.) and aquatic in particular. There is community support for more looped/linked equestrian trails and to develop Equestrian centre although tourism demand not established. Demand for Motor bike trails also needs assessment**.**	Undertake Trails audit to determine existing supply. Assess potential for dedicated mtb park in Strategy. Determine demand for more equestrian trails and Equestrian centre in Strategy Determine capacity to support motorbike trails in Strategy.	Shire	High
Trails of suitable standard/quality?	Need to determine suitability of grades of existing trail supply to satisfy range of markets and meet demand. Grading on existing trails- including Munda Biddi could help communicate the type of experiences available in Denmark and assist in trail use decision making.	Trails audit needs to assess quality and range of experiences offered on existing trails and to map to enable determination of gaps and opportunities. Munda Biddi Trail needs to be assessed by section to classify grades.	Shire DPaW /MBTF	High Medium
Critical mass of looped trails	Need to assess if there is enough connectivity to Denmark to create sense of trail hub and enough loops and links among existing trails.	Trails audit to assess connectivity and accessibility via loops and links.	Shire	High
Critical mass of 1 type or of a mixed type of trail?	As Denmark offers a mixed range of trails need to determine capacity within each user group and missed opportunities.	Trails audit to assess current accessibility and determine right mix and master plan to ensure	Shire	High

		connections to other trails, town and major attractions and loop opportunities and reduce user conflict. (for example opportunities to use fire trails to develop short or longer loops of munda biddi for mountain bikers)		
	For example Horses can only use state forest therefore…Harewood is the ideal place to develop equestrian however there is potential for conflict between users at Harewood- due to increasing demand for Motor bikes and mountain biking and walking.			
Mapping	Investigate on site trail head mapping, wayfinding. Improve mapping of Denmark trails..	Trails Audit - Need to audit hardcopy and on site mapping and identify gaps and then recommendations.	Shire	High
		Develop a marketing tool which promotes trails by varying degrees of difficulty.	PATAC/New Committee	Medium
		Develop tools to allow users to search by time or degree of difficulty of trail- including via Trails WA website…	PATAC/New Committee	Medium
		Standardizes track classification like ski fields.	Trails WA	Medium
Parking, Toilets	Ensure trail use is easy.	Consider trail users in development at River site/Bowling Club	Shire	High
		Undertake assessment of car parking within trails audit- are all user needs met?	Shire	
Critical mass of trails	There is reported demand for more mountain bike trail from trail enquires at the Visitor Centre including for downhlll and single track. Current supply is more suited for gentler, family end. There is a lack of loops, and harder trails.	Assess existing trail supply in Audit.	Shire	High
		Assess demand for trails in Trails Hub Strategy and determine market segments to target via trail development and marketing.	Shire	High
	There is also demand for Kayaking/ water trails at Visitor Centre- and	Develop communications tools such as–websites downloadable maps, print publications.	New Committee	Medium

	opportunities to increase access to inlets and coast			
Dive or Snorkel trails	There is a reported opportunity in guided water trail products given coastline lends itself to ocean going kayaking but people feel uncomfortable on water. There are hire services but no guided product.	Trail Hub Strategy to address opportunities for new business development. Business engagement strategy in conjunction with Chamber of Commerce?	Shire	High
Other	There is very little Interpretive information along Bibbulmun Track and Munda Biddi. There is an opportunity to differentiate the Denmark section of BT & MBT via interpretation or interpretive tours.	Trail Hub Strategy to address opportunities for new business development. Source grant funding to do interpretation plan for Denmark sections of BT and MBT.	Shire	High

Access				
Issue	Opportunity	Recommendation	Responsibility	Priority
Access to routes signed, promoted, safe	Assess- connection between trails, users, caravan parks and town?	Incorporate into trails audit.	High	High
Bus service	Is there demand for more bus services from Albany?	User demand survey?	Shire/Tourism association	Low
Taxis	Is there opportunity to promote pick up services on BT and MBT via taxis	Chamber of Commerce could promote this opportunity	CCI	Medium
Visitor maps	Visitor Guide needs to include trail maps	This is currently planned and is vital.	Tourism Association	High

Services and Amenities				
Issue	Opportunity	Recommendation	Responsibility	Priority
Signage	Opportunity for more interpretive trails and interpretation information on existing	Incorporate an audit of signage in trails audit- directional, wayfinding, interpretive	Shire	High

	trails and signage assessment			
Services for trail users	Identify supply and gaps in supply of Bike racks, Lockers for Backpacks and bikes. .	Incorporate an audit of needs for Bike racks, Lockers for Backpacks and bike, in overall Trails Hub Strategy.	Shire	High
Car parking	Ensure adequate supply of secure car parking - - Audit for all user types including equestrian float access.	Undertake in Trail Hub Strategy auditing and assessment. Identify gaps and develop a strategy.	Shire	High
Showers	Identify capacity or need for more showers. Include into River site /Bowling Club development.	Incorporate an assessment in Trails Hub Strategy.	Shire	High
Food Service availability	Ensure food service and opening hours are suitable for trail users.	Incorporate an audit in Trails Hub Strategy. Assess opening hours of food & bev providers in Strategy to determine gaps	Shire	High

Accommodation				
Issue	Opportunity	Recommendation	Responsibility	Priority
Trail Friendly accommodation providers	Revitalise MBTF Cycle Friendly Business program and engage with BTF Walker Friendly Business program. Assess demand for overnight equestrian services	Investigate any advantage in sponsoring the MBTF CFB program and BTF WFP programs to engage with Denmark Trail Hub. Develop trail hub strategy and assess user demand for equestrian tourism.	Shire/New committee Shire	Medium High

Activities				
Issue	Opportunity	Recommendation	Responsibility	Priority
Annual events linked to trail hub	Local events that utilise trails and different seasons. Get locals engaged with trails trough recreational events on trails. Develop annual trails hub linked events. Also develop a calendar of MTB events including athletic MTB event/race on	Do Audit and then Strategy identifying desired market segments. Implement recommendations. Develop targeted annual events targeting chosen market segments (trail users).	Shire New committee	High Medium

	local MTB park?	Build MTB trails, develop calendar of MTB athletic events.	New committee	Medium

Organisation and Management				
Issue	Opportunity	Recommendation	Responsibility	Priority
Formalised organising coordinating committee for trail hub (can be same as supporter group)?	Paths and trails committee exists but isn't able to influence council funding or policy and lacks tourism representation. PATAC could form basis but needs to be separated from Council.	Do Trail Hub Strategy. Identify governance regime: Set up incorporated body or link to an existing incorporated body. Develop a maintenance schedule with DPaW and Shire. Engage volunteers	Shire New committee New committee	High Medium Medium
Formalised trail management schedule		As above	New committee	Medium
Financial support	Need formailsed structure to be able to access grant funding. Create cooperative marketing initiatives which channel business investment into marketing and perhaps maintenance?	Trail s Hub Strategy to identify suitable governance structure to optimise access to financial support through grants, memberships and cooperative marketing. Source grant for assistance to map existing trails onto Trails WA.	Shire New committee	High Medium
Existence or potential for agreement regarding responsibility for hub trails construction, maintenance and management?	Opportunity to improve communications between PATAC committee, DPaW, Visitor Centre and broader tourism industry.	Include all stakeholders in new governance structure when developed in Trails Hub Strategy	Shire	High

Trail group cooperation and effective trail maintenance? Evidence of trail group cooperation and effective trail maintenance?	Fostering community involvement in trail hub important including volunteer and business community. Apparent good cooperation for river site development- especially from new Canoe and Kayaking club. Apparent good system for local users reporting trail maintenance needs.	Trail Hub Strategy to work with existing groups and supporters to identify most effective governance structure to embrace volunteerism and business involvement.	Shire	High

Community Engagement				
Issue	**Opportunity**	**Recommendation**	**Responsibility**	**Priority**
Community engagement	Existing community groups- William Bay NP association. Walpole Nornalup NP association are interested in nature conservation and visitor experience. Strong support from community	Existing community groups could be encouraged to create the structure for a new trails group or to extend their remit.	Shire	High
Formalized supporter group	A group is needed which is independent of Shire and can leverage grants.	Trails Hub Strategy to work with existing groups to determine most appropriate structure.	Shire	High

Business Engagement				
Issue	**Opportunity**	**Recommendation**	**Responsibility**	**Priority**
Business engagement with the Trail Hub concept and trail user markets?	Self guided cycle tours that include bicycle, helmet, lock, repair equipment, map, itinerary, panniers and breakdown service Supported cycle tours including a combination of for example bicycle, helmet, lock, map, itinerary, panniers, breakdown service, support vehicle, experienced local guide, meals, first aid	Develop Trail Hub Strategy and then develop business engagement strategy. Promote commercial opportunities through Chamber of Commerce?	Shire CCI/New committee	High Medium

	and remote area communication, pick up and drop off)
	          Cycle tourism packages that include the above plus accommodation and other services
	          kayak hire?			

Existence of suppliers to service target user groups – hikers, cyclers, horse riders, canoeists E.g. gear sales, repair services, equipment hire, emergency support.	Need to determine which are target user groups.	Do Audit of trails. Develop strategy and identify target user groups. Then develop business engagement strategies.	Shire	High
Tour operators offering packages to suit trail users?	Drop off/pick up needed for Munda Biddi. Opportunity to develop package with equipment, transport, guided notes.	Need tourism and business community working with and included on trails committee.	New committee	High
Tour companies providing transport, drop off and equipment (bike, backpack?) transport onto trails and from departure?	Commercial opportunities to package meals & camping services at Munda Biddi campsites; or pick up services from campsites to local accommodation. Packaged Day walks/meal to huts also potential; Packaged Hire of an electric bike…ride out and have a meal put on…	Need tourism and business community working with and included on trails committee. Promote commercial opportunities through Chamber of Commerce?	New committee/CCI	High Medium
Secure parking facilities for bikes, cars? Secure storage?	River site development?	Trail Audit to assess parking and storage availability and make recommendations in relation to Bowling Club/river development.	Shire	High
Food services	Opening hours need investigation.	Trail Hub Strategy to assess whether opening hours are servicing visitors 7 days per week.	Shire	High

| Marketing				
Issue	Opportunity	Recommendation	Responsibility	Priority
Existence of suitable promotional material, pre-visit pamphlets maps?	Better quality maps.	Do audit of trails and mapping information. Develop Trail hub strategy. Identify target users, and best marketing tools	Shire Shire	High High
Evidence of identification and understanding of target market and communication methods?	Identify trails use- demand and priorities target trail users	Trails audit Trails hub strategy.	Shire Shire	High High
Deliberate planning of trail and visitor services to meet target market needs?	Trail Hub Strategy	Trail Hub Strategy to include marketing recommendations.	Shire	High
Effective marketing strategy, including branding, website, appropriate promotional maps and communication modes?	More trails information needed. Opportunity to develop Season Calendar, QR codes?	Marketing strategies to consider : Visitor Guide, on-line marketing and creative marketing techniques- . Demark Trails Hub Six Seasons of Trail Opportunities matrix promotion- promoting cultural , indigenous, ecotourism and naturebased tourism. Matrix for – best season, degree of mobility, time available, experience sought (thrill, fitness, cultural, spiritual or outdoors). Trails WA website…search by how much time you have…	New committee	Medium

Brand				
Issue	Opportunity	Recommendation	Responsibility	Priority
Existence of a well-established trails-linked brand?	Develop distinct trail brand for Denmark	In trail hub strategy identify trail user targets and then develop theme-USP for Denmark.	New committee	Medium
Capacity to leverage brand	Work closely with business community to develop cooperative marketing trails-lined promotions.	Business engagement process and cooperative marketing.	New committee	Medium

Priority Action List

1. Undertake a Trails Audit-
   - assess extant trails: condition, grade, user type, mapping, signage, marketing and existence of interpretation.
   - assess quality and range of experiences offered on existing trails and map to enable determination of gaps and opportunities
   - audit hardcopy and on site mapping and identify gaps
   - assess connectivity and accessibility via loops and links, connection between trails, users, caravan parks and town
   - incorporate an audit of signage - directional, wayfinding, interpretive and identify gaps.
   - Identify gaps and opportunities to improve mapping, signage, loops, connections, links.

2. Undertake a Trails Hub strategy-
   - research demand for trails from a range of user groups, including assess potential for dedicated mtb park in Denmark, demand for more equestrian trails from tourists and Equestrian centre in Denmark, and capacity to support motorbike trails in Denmark.
   - determine market segments to target via trail development and marketing
   - identify recommendations for new trail development through a Trails Master Plan,
   - master plan to recommend:
     - o the right mix to ensure connections to other trails, town and major attractions and loop opportunities and reduce user conflict. (for example opportunities to use fire trails to develop short or longer loops of munda biddi for mountain bikers).
     - o signage strategy to optimise trail use, promote wayfinding, and reduce user conflicts.
     - o assessment of car parking to ensure all user needs met and safety.
     - o Assess capacity or need for more showers, toilets and services for trail users such as Bike racks, Lockers for Backpacks and bike
     - o Assess supply and opening hours of food & bev providers
   - identify broad marketing strategies and branding recommendations,
   - work with existing NFP groups, stakeholders and supporters to identify most effective governance structure to oversee Denmark Trail Hub development and optimise access to financial support through grants, memberships and cooperative marketing and embrace volunteerism and tourism and business involvement.

3. Marketing of Trail Hub
   - Develop a new brand with a unique theme for Denmark focused on Denmark's unique differences as a trails/outdoor destination.
   - Develop marketing collateral to allow users to search for Denmark's trails by time or degree of difficulty of trail. (note idea of Demark Trails Hub Six Seasons of Trail Opportunities matrix promotion- promoting cultural , indigenous, ecotourism and nature-based tourism; including Matrix for – best season, degree of mobility, time available, experience sought (thrill, fitness, cultural, spiritual or outdoors)
   - Develop communications tools such as–websites downloadable maps, print publications including existing Visitor Guide.
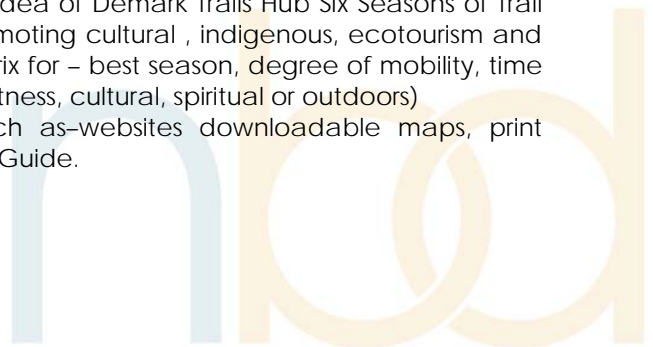
4. Other projects
   - Consider trails hub development within existing projects such as Bowling Club/river development

   - Interpretation Plan
Identify opportunities to interpret MBT and BT to differentiate and identify other interpretive opportunities along existing and planned trails.
   - Business Engagement
     o Investigate any advantage in sponsoring the MBTF Cycle Friendly program and BTF Walker Friendly program to engage with Denmark business community.
     o Develop business engagement strategy to ensure businesses are engaged in potential of trails hub and access cooperative marketing opportunities.
     o Promote existing commercial opportunities through Chamber of Commerce such as opportunity to promote pick up services on BT and MBT via taxis

5. Longer term:
   - Implement governance structure recommended in Trails Hub strategy and implement other medium and low priority projects as identified in this report.
   - Develop targeted annual events targeting chosen market segments (trail users)
   - Build MTB trails and develop calendar of MTB athletic challenges
   - Source a grant to map trails onto Trails WA.

6. For other groups:
Trails WA:
   - Develop tools to allow users to search by time available or degree of difficulty of trail on Trails WA website.
   - Standardize track classification like ski fields.

Munda Biddi Trail Foundation/DPaW:
   - Munda Biddi Trail to be assessed by section to classify grades.

Budget Items
The following itemises only those items which are considered priorities. Denmark will benefit from delaying the remaining items until these priority projects are undertaken.

Item	Cost
Trails Audit	$30,000
Trails Hub Strategy and Master Plan	$50,000
Brand development	$10,000
Interpretation Plan	$25,000

6.   Conclusion

Denmark is very well placed to position itself as a trails tourism destination through the creation of a Trails Hub. The recommendations provided above are intended to provide guidance in how the Denmark trails and business community can engage with this potential in order to reap broader, sustainable and long term benefits.

7.   Appendices

Denmark Trails Summary

From Path Development Plan:

Project	Construction Status	Remarks	Promoted	Category
Bibbulmun Track	100%	Part of the National Parks Scheme	On "trails of denmark" brochure	walk
Denmark Nornalup Heritage Rail Trail	75% %	Louise Duxbury/ Basil..? lduxbury@greenskills. Goes to nornalup but Small section is missing..-goes through people's property.	On "trails of denmark" brochure. & Denmark.com.au Dual use plus horseriding permitted in some sections.	Shared use- not just bikes and walkers.
Harewood Forest Track	30%	Northern section of track still to be defined and constructed	On "Trails of Denmark" brochure & Denmark.com.au	walk
Wilson Headland Loop	50%	In process of being completed- ocean beach- lights beach. In construction stage- dual use.		Dual use.
Karri Walk Trail	100%		On "Trails of Denmark" brochure & & Denmark.com.au	Walk
Poison Point Walk Trail	0%	May tie in with a current proposal to establish a finger jetty on the reserve	On "Trails of Denmark" brochure & Denmark.com.au	walk
Mt Lindesay Walk Track	CAL M	Park of the National Parks Scheme	On "trails of 31 enmark" brochure & Denmark.com.au	walk
Mokare Heritage Trail	100%	Requires work to avoid sections being under water for winter months	On "Trails of Denmark" brochure & Denmark.com.au	Dual use
Monkey Rock Circuit/Mt Hallowell Loop	Not sure	Might be part of Bib track?	Called Sheila Hill Track On "Trails of Denmark" brochure & Denmark.com.au	walk
Wilson Inlet	100%	Same as Nornalup htg rail	On "Trails of Denmark" brochure. &	Shared use

Heritage Trail		trail. Mtce of shelters and signage required Trail itself is there	Denmark.com.au IS the same as Denmark-Nornalup Heritage Rail Trail?? Duel use	
Little River Trail	100%	Signage and Maintenance schedule required	On "Trails of Denmark" brochure. & Denmark.com.au Part of Bibbulmun Track	walk
River ? Trail	100%	Ocean Bch Rd to Denmark Nornalup Rail Trail Completed as part of rail trail		
Silver Road Trails	Don't know	Further information required from Jessie McIver – Low Priority	Don't know	
Hay River Trail	Albany boundary	Denmark Nornalup rail trail goes as far as hay river. Munda biddi comes in too.		
Possum Trappers Cave Trail	CALM	Part of the National Parks Scheme		
Falls of Forth Trail	CALM	Part of the National Parks Scheme		
Wetlands Centre Trail	0%	Greenskills trail in private property. Ask louise	On "Trails of Denmark" brochure & On Denmark.com.au	walk
Mt Lindesay Walk Track – Granite Outcrop	CALM	Part of the National Parks Scheme		
Mt Romance Trails	CALM	Part of the National Parks Scheme		
Sotto Hills Loop	CALM	Part of the National Parks Scheme		

Other trails

Trail	Promoted	Category
Kwoorabup Community Park. On northern side of SC Hwy near new hospital, pathways all through.	On "Trails of Denmark" brochure & Denmark.com.au	Dual use
Munda Biddi Trail	On "Trails of Denmark" brochure but out of date	mtb

	info	
Town Heritage Walk??? From town bridge- mokare trail joins karri trail at river.	On "Trails of Denmark" brochure & Denmark.com.au	walk
Denmark River Water Trail 4km return	On Denmark.com.au Check with VC	kayak
Hay River Water Trail	On Denmark.com.au	kayak
Wilson Inlet Water Trail	On Denmark.com.au	kayak
Frankland River Water Trail	On Denmark.com.au	kayak

Dual use paths

Location	Promoted	Category
Ocean Beach Road from South Coast Hwy to Ocean Beach car park	Not. Found on Munda Biddi Denmark Cycle Friendly Strategic Plan Promoted under regional bicycle network- country pathways.	Shared use

Self drive tours

Name	Promoted
Scotsdale Scenic Drive	On Denmark.com.au
Extended Scotsdale Scenic Drive	On Denmark.com.au
Mt Shadforth Scenic Drive	On Denmark.com.au
Youngs Siding to Walpole Scenic Drive	On Denmark.com.au
Nornalup on the Frankland River to Circular Pool	On Denmark.com.au
Nornalup to Conspicuous Cliff and Ficifolia Tourist Drive	On Denmark.com.au
Bow Bridge to Peaceful Bay	On Denmark.com.au