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Bibbulmun TRACK FOUNDATION

GOVERNMENT OF WESTERN AUSTRALIA

DEPARTMENT OF Conservation AND LAND MANAGEMENT
Conserving the nature of WA

# Department of Conservation and Land Management

**And**

# Bibbulmun Track Foundation

## Bibbulmun Track User Research Report


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GOVERNMENT OF WESTERN AUSTRALIA
Department of Sport and Recreation

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# Short Report

*This document is a short summary version of the full report. For more methodological detail, detailed results and the appendices referred to in this version, the reader should consult the full version of the report.*

## STUDY BACKGROUND, OBJECTIVES AND METHODOLOGY

### Background

The Bibbulmun Track is one of the world's great long distance walking tracks, stretching 963km from the eastern outskirts of Perth to Albany on the south coast of Western Australia. The track in its current form was opened in 1998, and a number of smaller scale projects to provide an indication of user numbers have been undertaken by the Department for Conservation and Land Management. With the assistance of funding from Lotterywest, this study represents the first attempt to measure total usage levels and patterns across the entire track.

### Objectives

The primary objective of this study was to establish a methodology that could be replicated across time and locations to obtain similar data about usage of the Bibbulmun Track in future years, and also other tracks and facilities

Additional to this was an equally important objective to make a reliable estimate of the current number of users of the track, with 'user days' being the key indicator of usage. Secondary objectives were to measure awareness of the track in the wider community; to shed light on patterns of usage and profile of users; and to gain some insight into the economic activity inspired by the track..

### Methodology

The methodology used for this study was one which Colmar Brunton had developed for previous projects for the Department for Sport and Recreation and CALM in 2000 and 2001. The central component of this method is a systematic schedule of detailed observation and interviews with users. For this particular study of a well-known high-profile facility, this was complemented by a phone survey of the Perth and south-west populations, and also a nominal survey of some businesses.

Walker observations and survey

The walker observation and survey were the most important parts of the project. The observation data was used as the basis of the calculations of user days, and the surveys completed with walkers then used to work backwards to the number of visits and the number of users.

In summary, the observation process consisted of the following steps:

- Break the track down into four classes of functional sections: tourist destinations ("T" sites); high-frequency sections ("H"); sections near population centres ("P"); and long-distance walking only sections ("D"). The track was broken down into 54 such sections (see Appendix A for details).

- Identify proto-typical locations within each class of section that could be used for observing user numbers and patterns. 16 such observation sites were chosen.

- Develop a systematic pattern of observation sessions for each proto-typical location. This consisted of breaking the week into nine sessions based on three 'type of days' (weekdays, Saturdays and Sundays) and three 'times of day' (dawn-10am; 10am-2pm; 2pm-sunset). Multiple observation sessions

for each of these sessions were scheduled at each of the observation sites (see Appendix D for details). During these observation sessions walkers were also interviewed where possible.

Data was collected by Bibbulmun Track Foundation (BTF) volunteers using observation records (Appendix B) and a questionnaire (Appendix C) developed by Colmar Brunton, CALM Tracks & Trails Unit and the Bibbulmun Track Foundation. The commitment of BTF volunteers was critical to the success of the project, and Colmar Brunton would like to thank those volunteers who assisted in the project.

A total of 198 sessions were conducted between April and October 2003 out of the 405 originally scheduled (see Appendix D). Although this is only around half of the number of sessions that would have ideally been completed, we obtained four or more observations for all but three of the nine sessions across the four classes of track section. During these sessions 295 interviews with walkers were also completed.

| | T sites | | | H Sites | | | P Sites | | | D Sites | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Sessior | Week day | Sat | Sun | Week day | Sat | Sun | Week day | Sat | Sun | Week day | Sat | Sun |
| 1 | 5 | 2 | 6 | 6 | 6 | 6 | 6 | 6 | 5 | 4 | 5 | 5 |
| 2 | 7 | 6 | 4 | 8 | 5 | 8 | 8 | 1 | 2 | 5 | 4 | 5 |
| 3 | 6 | 5 | 7 | 9 | 5 | 8 | 4 | 4 | 4 | 7 | 6 | 7 |

Community telephone survey

To supplement the data from the observations, an additional telephone survey (Appendix E) was conducted to measure awareness of the track in the community, and levels of usage. A total sample of N=400 interviews were completed (n=300 in Perth and n=100 in the south-west and great southern areas along the track).

The use of a phone survey was only possible because of the high-profile of the Bibbulmun Track – for lesser known facilities this would be a pointless exercise. As it turned out the phone survey was able to produce a credible awareness figure, but even for a major track like the Bibbulmun Track, a phone survey proved to be an unreliable method of measuring usage. The proportion of people who claimed to have ever (or recently) used the track suggest that many people believe they are using the Bibbulmun Track when they are in fact using some other track or facility, as the figures for usage were unrealistically high given the observed levels of usage.

Business survey

The business survey (Appendix F) was mailed to several hundred businesses on the BTF database. Only 44 businesses responded – almost all from the accommodation industry. While this survey was expected to only provide indicative feedback about the economic importance of the track, the data from this survey was not sufficiently broad or deep to allow anything more than a cursory consideration.

However, spend data from walkers was obtained and this was able to provide us with some understanding of the economic activity associated with the track.

## KEY RESULTS

### Awareness of the track

The phone survey indicates that 81% of people in Perth are aware of the Bibbulmun Track, and that 91% of people in the south-west / great-southern region are aware of the track.

If anything, awareness of the track seems to peak in the 40-59 age group, but is uniform between males and females.

### Usage – User days

The key measure of usage of the track is the number of user days on the track each year. The observational data, including an allowance for higher usage across the summer months, suggests that around 280,000 user days are spent on the track each year.

### Usage – Visits

72% of walkers interviewed on the track were doing day-walks, and only 8% were walking for more than 3 days. However, the small number of long distance walkers contribute to an average duration of 2.04 days for each walk.

Thus, the 280,000 user days is the equivalent of around 137,250 visits to the track each year.

### Usage – Users

A third of track users use the track only once a year, and 70% use it no more than five times per year. Despite being the bulk of users, these low frequency users make up only about a quarter of all visits to the track. Only the top 2-3% of users visit the track weekly or more often – but the frequency with which they visit the track means that they too contribute around a quarter of all the visits to the track each year.

### Patterns of usage and attitudes of users

<u>When the track is used</u>

Different classes of section are used in different ways.

The T (Tourism site) sections are the most heavily used, with use highest across the weekend. Weekday use is highest in the mornings and midday sessions; Saturday use peaks in the afternoon; while Sunday use peaks around midday.

The H (High use) sections are very lightly used during weekdays, moderately heavily used on Saturdays, and very heavily used on Sundays. Both Saturday and Sunday usage peaks around midday.

The P (Town sites) section have a slightly lower overall level of use than the H sections, but a quite different pattern. The bulk of use of these sections seems to be on Saturdays (particularly in the middle of the day), with weekday usage higher than Sundays.

D (Distance sites) sections are used lightly compared to the other sections, and their usage is much more consistent across the week. There is some suggestion that 2-day 1-night walks over a Saturday night are quite common.

Reasons for use

Nearly a third of all users indicated that a combination of the pleasure, enjoyment and challenge that they got from using the track was the major reason for them using it. 16% indicated that something to do with health and exercise was their main motivation, while for 14% simply sightseeing and enjoying the scenery was at the top of their list.

Duration and distance

71% of people interviewed on the track indicated that they were doing a day-walk (41% <4 hours; 30% >4 hours). A further 19% were walking for 2-3 days, and 10% were actually walking for 4 or more days (including 5% who were walking end to end).

Given these durations, it is not surprising that 44% of walks were of less than 10km in length, and 72% less than 20km. The median length was 14km.

57% of walkers were doing loop walks, but a surprisingly high 43% reported that they were doing a one-way walk that required transport to and from different start and end points.

Method of accessing the track

Nearly 90% of walkers accessed the track by private vehicle (67% on their own car, 22% being 'dropped off').

Composition of walking parties

The most common group size is 2 (42%), although the average size is 3.1 people. 22% of walking 'parties' are individuals walking alone, and only 13% are groups of 5 or more people (and only 2% being made up of 10 or more people).

The track is equally used by males and females, with 51% of observed users being male and 49% female. Approximately 80% were adults, and 20% children (under 18).

Two thirds of people walking in a group of two or more were walking with family or friends, and another 28% with their spouse or partner specifically. Commercially organised groups made up just 1% of all groups.

Age of walkers

Over 80% of walkers were aged 25-60, with just 8% of interviewed walkers being 18-24 and 9% being 60+. There was no difference between male and female ages.

Where walkers come from

89% of walkers interviewed were from WA, 7% from interstate and 4% from overseas. Although the sample size is small, about one in three walkers from overseas or interstate had decided to walk the track before arriving in WA -, suggesting that the track either has a profile beyond the state borders or information about the track is readily available to prospective visitors. Overseas

and interstate visitors also seemed to tend towards longer duration walks, but again the sample used here is very small.

Accommodation

31% of walkers on the track reported using some form of accommodation as a part of their walk on the track. 81% of nights were spent in track campsites (reaffirming the importance of these campsites). Hotel/motels (5%), Backpackers (5%) and other campsites (4%) picked up the bulk of the rest of the nights.

Around half of all track users (and a similar proportion of those who use track campsites) indicated that they would be happy to pay a small fee to use a track campsite so long as 100% of the money raised went into maintenance of the track.

Knowledge of the track and organisations

Two thirds of walkers on the track put their knowledge of it down to 'word of mouth' (in previous studies Colmar Brunton has conducted, many regular users of such facilities have indicated that they have 'always' known about them). 19% had heard of the track in the media. 8% reported that they became aware of the track through CALM and 5% through the BTF (or the Friends of the Bibbulmun Track).

82% of walkers were aware of the BTF / Friends, including 14% who were current members (suggesting that members of the BTF are very active users of the track). In the phone survey only 20% of people recognised the BTF name, while 34% recognised the older Friends name.

Satisfaction with the track

Users of the track were very satisfied with it. 82% rated themselves as being pleased with their walk (6 or 7 out of 7) and 59% felt the experience exceeded their expectations (again, giving a rating of 6 or 7 out of 7).

Averaging these two ratings, 61% of walkers gave an average satisfaction rating of 6.0 or higher out of 7.0, and the 'average' average rating was 5.9 / 7.0.

Future use of the track

93% of walkers on the track indicated that they expected to use the track again in the future – including some 97% of WA based walkers.

Looking at the wider community, previous use (or presumed use) and knowledge of the track were major predictors of intended use. 50% of those people who thought that they had previously used the Bibbulmun Track indicated that they intended to do so again, and 31% of those people aware of the track intended to do so. Only 11% of those who had not heard of the track indicated any intention to use it after it was described to them.

### Economic activity associated with the track

Walkers were asked to indicate how much money they personally spent as a result of their walk (preparing, travelling to and from, and during).

| Days walking | Meals | Food supplies | Equip't | Accom | Petrol | Other trans / parking | Tours / lessons | Maps, guides etc | Other | Total |
|---|---|---|---|---|---|---|---|---|---|---|
| **1** | $7.97 | $9.56 | $21.90 | $10.88 | $15.69 | $0.06 | $- | $5.26 | $- | **$72.32** |
| **2-3** | $7.54 | $39.56 | $90.40 | $23.42 | $21.23 | $6.05 | $- | $15.16 | $- | **$203.36** |
| **4+** | $81.15 | $178.27 | $284.55 | $121.04 | $16.15 | $20.00 | $- | $36.70 | $- | **$737.86** |

Table shows mean expenditure for each category (sample sizes: 1 day: n=206; 2-3 days: n=57; 4+ days: n=26)
Note: A small number of walkers who reported spending in excess of $1000 on equipment for their walk were excluded from the analysis as they significantly skewed the results.

These results suggest that an average day walker spends around $72 in total as a result of their walk. Walkers on a 2-3 day walk average around $200, while those on 4 day or longer walks average nearly $750. The major areas in which differences occur with increased duration on the walk are food / meals, accommodation and equipment.

Based on the 137,250 walks estimated to take place on the track each year, multiplying these expenditure figures out suggests that nearly $21 million are spent each year as a result of walkers on the Bibbulmun Track.

| Total visits | 100% | 137,250 | |
|---|---|---|---|
| **Duration** | **Proportion** | **Number of walks** | **Expenditure** |
| 1 day | 72% | 98820 | $ 7,146,662 |
| 2-3 days | 20% | 27450 | $ 5,582,232 |
| 4+ days | 8% | 10980 | $ 8,101,703 |
| | | | **$ 20,830,597** |

Even excluding the equipment category (which seems at face value to be a little high as an average, especially for day walkers) from this calculation leaves some $13 million spent annually by track walkers.

The business survey gave little meaningful insight into the direct impact of the track on business. However, it did indicate that for some businesses were at least partially sited for proximity to the track, and a small number indicated that if the track ceased to exist that their business may also cease to exist. While this effect cannot be quantified, it is evident from this that the track does have an economic importance to at least some business operators – particularly in the country towns through which the track passes.

## CONCLUSIONS AND RECOMMENDATIONS

There are two areas in which this report needs to draw conclusions and make recommendations: with respect to usage of the track; and with respect to the methodology utilised.

### With respect to use of the track

It is clear from this study that the Bibbulmun Track is a significant recreational facility in Western Australia. It is well known, heavily used, and generates a not insignificant level of economic activity.

It is doubtful that many passive recreational facilities would have an awareness level in the wider community to rival the 81% of Perth residents and 91% of South West / Great Southern residents who are aware of the track.

The observational data from the study suggests that some 21,000 people make an annual 137,250 visits to the track, and spend some 280,000 'user days' on the 963km of track. It appears that some 70% of users are 'low frequency users' using the track five or fewer times per year, making up around a quarter of all visits to the track. Conversely, a small group of maybe 2-3% of 'high frequency users' contribute a similar proportion of visits to the track.

The majority of activity is concentrated in relatively small sections of the track around the major tourist sites and population centres. Use of the long-distance sections throughout the south west is obviously much smaller.

There is some evidence that the track has a profile beyond WA, with one in three overseas and interstate visitors using the track indicating that they had intended to walk the track before arriving in WA. This suggests that the track may be playing a role in driving tourism in the state and may even be attracting visitors in its own right, although much more substantial data would be needed to confirm this.

It is also clear that the track generates substantial economic activity within the state. Extrapolating out the amounts that walkers indicate they spend each time they use the track suggests that up to $21 million annually may be spent by people walking the track. This includes spending on track-specific items such as equipment and guides, but also food and supplies, petrol and accommodation. The business survey suggests that while the track may directly affect only a small number of businesses, there are *some* businesses that are heavily reliant on the track for their livelihood, and who clearly rely on the on-going level of use of the track for their success.

### With respect to the methodology

The methodology used here was somewhat experimental, in that although components had been successfully used in other studies, never had it been applied to a facility as long and diverse as the Bibbulmun Track. The three elements of the methodology each had their strengths and weaknesses in execution.

Observation and interviewing

The observation and interview component was the most important, and also in the end the most successful. Although only around 50% of all planned sessions were completed, sufficient data was generated to allow the estimates outlined here to be made. If continued data collection can be carried out over future months and years, then the estimates of usage can be further refined and the seasonality variables more precisely incorporated.

The biggest challenge for this project (and projects like it in the future) is to find resources on the ground who can reliably collect the data. The success of this project was dependant on the assistance of volunteers and the tireless work of Gwen Plunkett at the BTF in recruiting and co-ordinating them. In future, it may be preferable to find a small number of committed volunteers who are willing to be involved and select suitable locations convenient to them where data can be collected, rather than trying to find volunteers to service specific locations.

Once resources on the ground are available, the actual processes of counting and interviewing and returning data worked quite effectively.

Phone survey

The phone survey was included in this project because the Bibbulmun Track is a sufficiently high profile facility that awareness and usage was expected to be measurable at the community level. While this method showed that it can be reliably used to gauge awareness, considerable caution needs to be taken if measuring usage. It is possible that a larger sample size would have enabled a more reliable measure of usage to be made.

When using this methodology for measuring usage levels, questions need to be very specific in identifying and defining the track of interest. It seems likely in this study that people were unable to distinguish between their use of the Bibbulmun Track and their use of other tracks and facilities, or sites along the length of the track from the track itself. The reported usage based on the phone survey was as much as ten times that which could be supported by the observational data.

It must be recommended then that phone surveys be only used to measure awareness of facilities for those that are sufficiently well-known for this to be a meaningful exercise, and usage data from phone surveys to be corroborated by data from other sources before any definitive conclusions drawn. Conducting a phone survey of specific areas immediately surround the facility may be more reliable and therefore useful.

Business survey

The business survey was a potentially useful component of the study, and it was only due to the nature of the sample who responded that this was less useful than hoped. If information about the impact of a facility on businesses associated with it could be obtained, then the facility's significance could be at least considered. In this case, where this was a relatively low priority, insufficient resources were available to extract the maximum outcome from this component.

In future studies, if understanding the economic impact of a facility is a major priority, and if sufficiently good lists of businesses can be developed and resources be allocated to pursuing the data collection (eg: face-to-face visits or follow up phone calls), then such data could be generated quite reliably.

Summary of methodology

Overall, we feel that the methodology has been successful in obtaining a reliable estimate of usage of the track. Sample sizes were smaller than we had hoped, but given the constraints of data collection the final sizes were at least sufficient to allow estimates to be made. Continuation of structured data collection will allow more refined estimates to be made in future. We also believe that the observational methodology and suite of tools can be applied to a wider range of tracks and facilities as required in the future.

**Colmar Brunton**
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