

Brisbane Valley Rail Trail (BVRT) Visitor Research Program

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Gender balance 😊

Session Overview

- Visitor Profile Overview
- Market Opportunities Analysis
- Business Success Stories
- Brainstorming Activity
- Key Takeaways and Q&A

Objectives

- Present key insights into BVRT visitor demographics and behaviours.
- Discuss strategic marketing focus for local vs new demographics.
- Showcase local business success stories aligned with BVRT.

** THE REPORT IS QUITE DETAILED – WE ARE PRESENTING ONLY HIGHLIGHTS!

** WE PREFER TO HAVE CONVERSATIONS / QUESTIONS THROUGHOUT – PLEASE DON'T BE SHY 😊

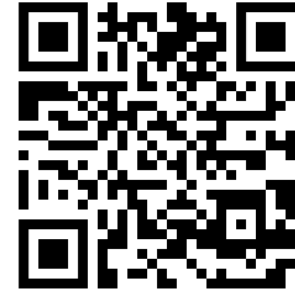
** BUT WE RESERVE THE RIGHT TO KEEP THINGS MOVING ALONG



How are we going with labour and skills??

KEEP IN MIND....

Grow Your Own Regional Workforce Program



- Jobs Queensland is partnering with regions to develop workforce plans / initiatives to support “grow your own” (GYO) workforces and skills development.
- The 'Grow Your Own' (GYO) Program enables key local stakeholders and industry representatives to identify workforce needs and plan what skills are required to meet the needs of their sector and support economic goals.
- **It's all about using local workforce approaches, connected to local economic opportunities.**
- Projects supported will be action-based, addressing local solutions and driven by regional industry stakeholders.
- ****THIS PROJECT IS UNDERWAY AND RUNS THROUGH SEPT 2025**
- **** SCAN THE QR CODE, TALK TO US OR STEPH PARKER FROM QCT**

Brisbane Valley Rail Trail Workforce Empowerment Initiative

Queensland Country Tourism

Along the breadth of the 161-kilometre Brisbane Valley Rail Trail (BVRT), there is need for a dedicated workforce plan to address critical shortages and support the growth of the local tourism industry. Research has highlighted a diverse visitor base including families, fitness enthusiasts, retirees and agritourism seekers, creating high demand for skilled workers in accommodation, food services, retail, trail maintenance and specialty tourism services. However, recruitment and retention challenges persist due to the region's seasonal nature and competition from other sectors.

Key workforce issues include high turnover rates in tourism-related jobs, alongside growing demand for soft skills, digital marketing expertise and business acumen. The 2023 Queensland Tourism Industry Council Workforce Report also highlights significant occupational shortages in frontline roles, tour guides and digital marketing.

A comprehensive, industry-led, focussed workforce plan is essential to address these challenges. By offering targeted training, job placement services and fostering partnerships with educational institutions, the plan will ensure sustainable tourism development, reduce unemployment and promote economic resilience in the regions along the BVRT.

BVRT Visitor Research Program

Phase 1 (2020-2021)

- User Profile
- Trip Characteristics
- Information Touchpoints
- Travel Motivations
- Economic Value
- The User Experience



Phase 2 (2022-2023)

- Similarities and differences between phase 1 and phase 2
- Needs and expectations of existing and potential users
- Local business voice (including success stories)
- Key economic data and impact indicators



Demographic Profile

		PHASE 1	PHASE 2
Responses		776	526
Female		43%	46%
Mean Age		53	53
Employment Status	Part-Time	9%	11%
	Full-Time	64%	65%
	Retired	20%	18%
Household Income	Less than \$80k	21%	17%
	\$80k to \$140k	28%	26%
	More than \$140k	28%	34%

Who is Visiting BVRT?

67% Queensland
 7.5% Interstate 3.8% NSW
 25.5% Not specified

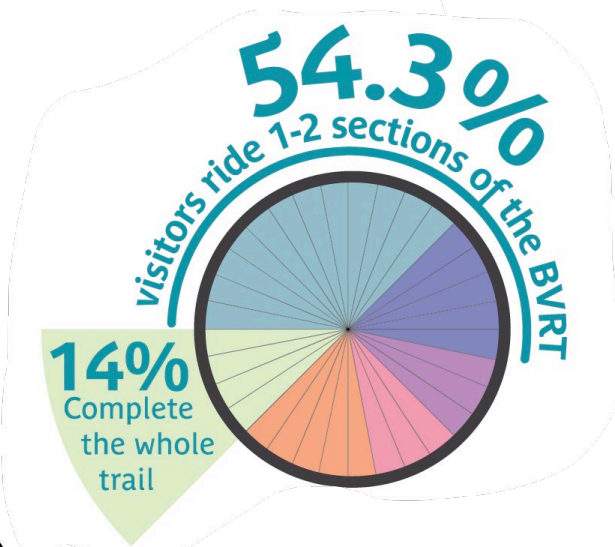
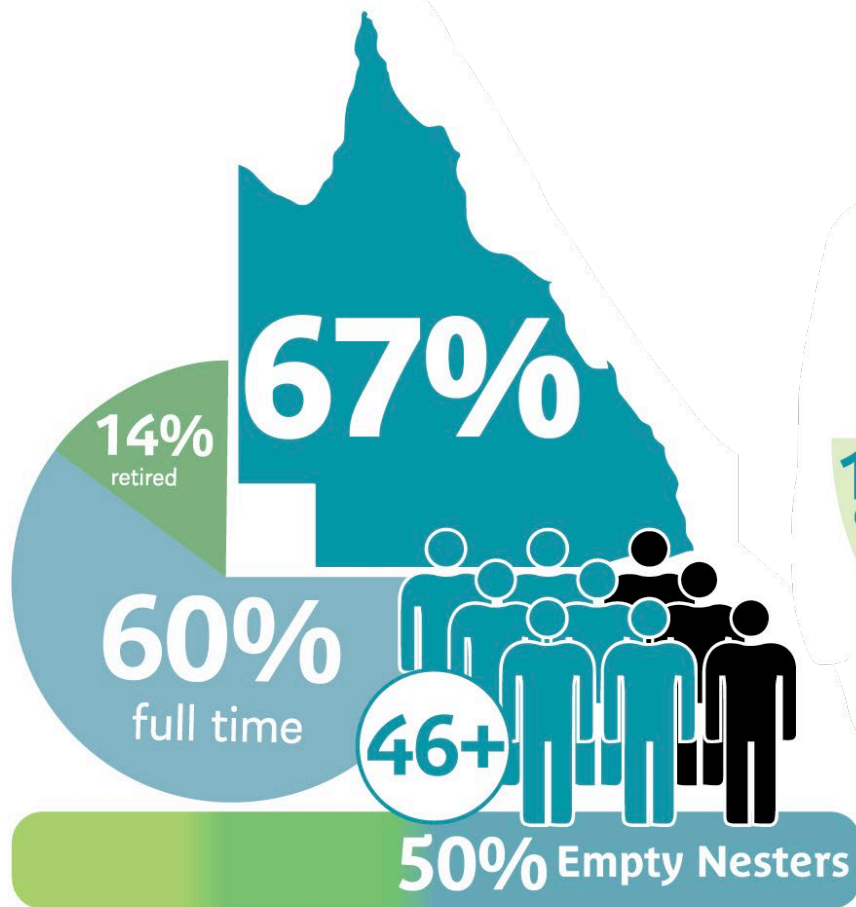
34.8% Brisbane
 37.3% BVRT LGAs
 27.9% Rest of Queensland

65.1% 46+ years old
 29.7% 56 to 65 years old

50% 'Empty Nesters'
 25% 'Full Nester III'
 (youngest in Secondary)

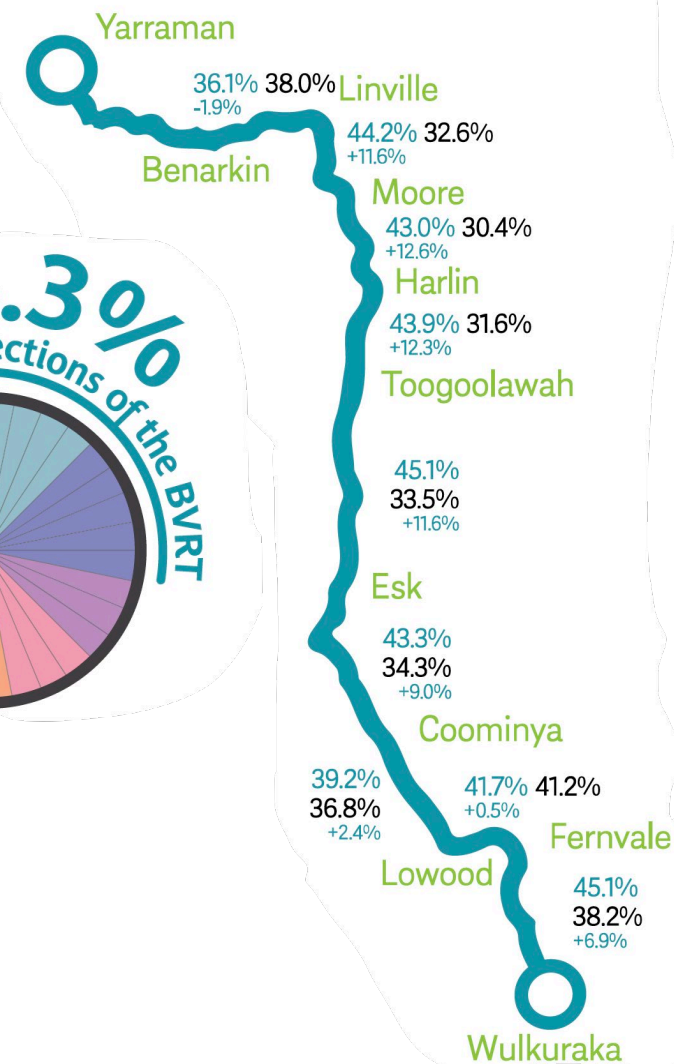
57.8% Earn >\$110K
 60.4% Employed full time
 13.8% Retired.

Majority are cyclists.



BVRT Sections

Section of the trail utilised. 2024 2019 (difference)

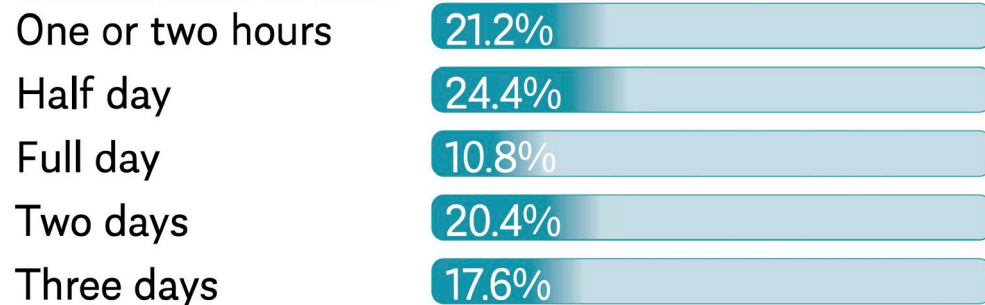


Visitor Profile

Day Trippers

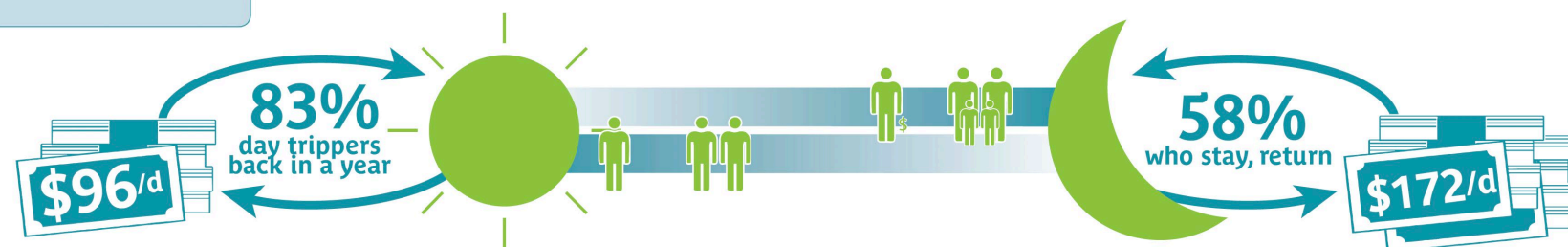
- 76.8% of BVRT visitors are **repeat visitors**
- >83% of day trippers intend to **return within 12 months**
- The average day-tripper spends \$96.67 per day
- Most visitors (67.3%) use the trail for a day or less
- Day trippers are predominantly **young singles** (75.0%) and **empty nesters** (85.7%)

Visitors time on trail

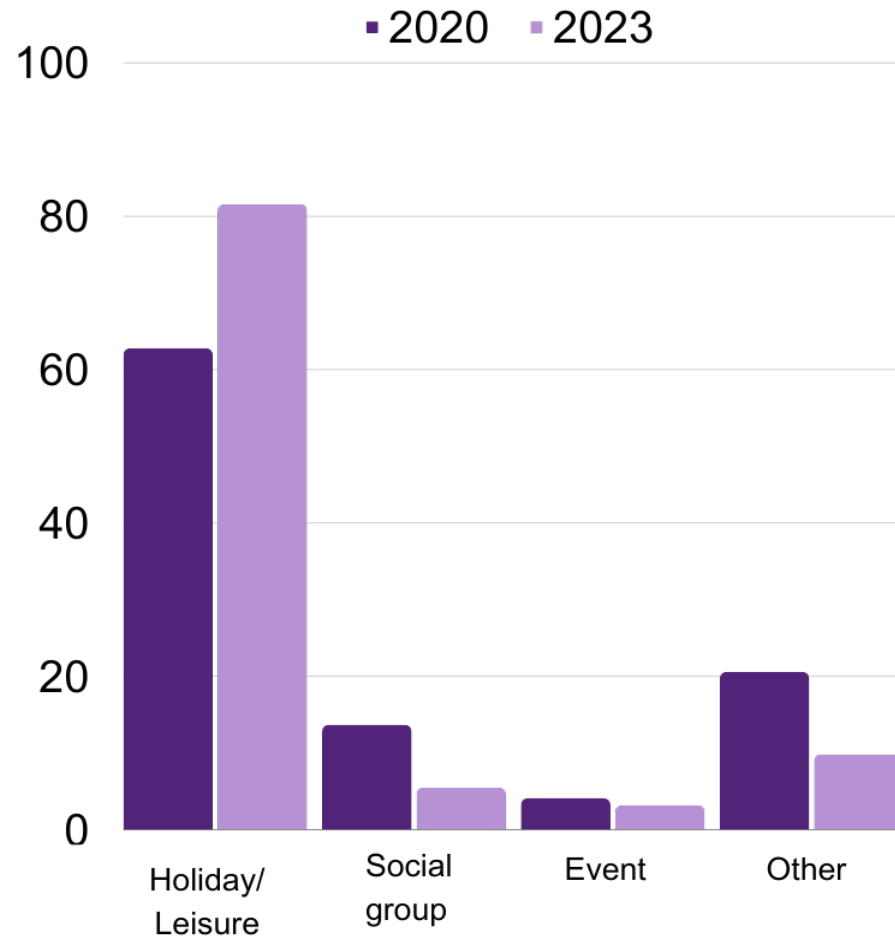


Overnight Stays

- The average overnight visitor spends **\$172 per day**
- **58.3%** of people who stay overnight are likely to **return** within 12 months
- 35.1% stay in **hotels, motels, and pubs**
- 43% of visitors enjoy caravanning and camping, with 23.6% in tents and glamping, and 20% staying in a motorhome or caravan
- **Overnight stays** are more common among **couples and families**, making them a primary target demographic
- Campers, caravaners, or those visiting friends and relatives (VFR) are more likely to **stay longer**



Reasons for Using the Rail Trail

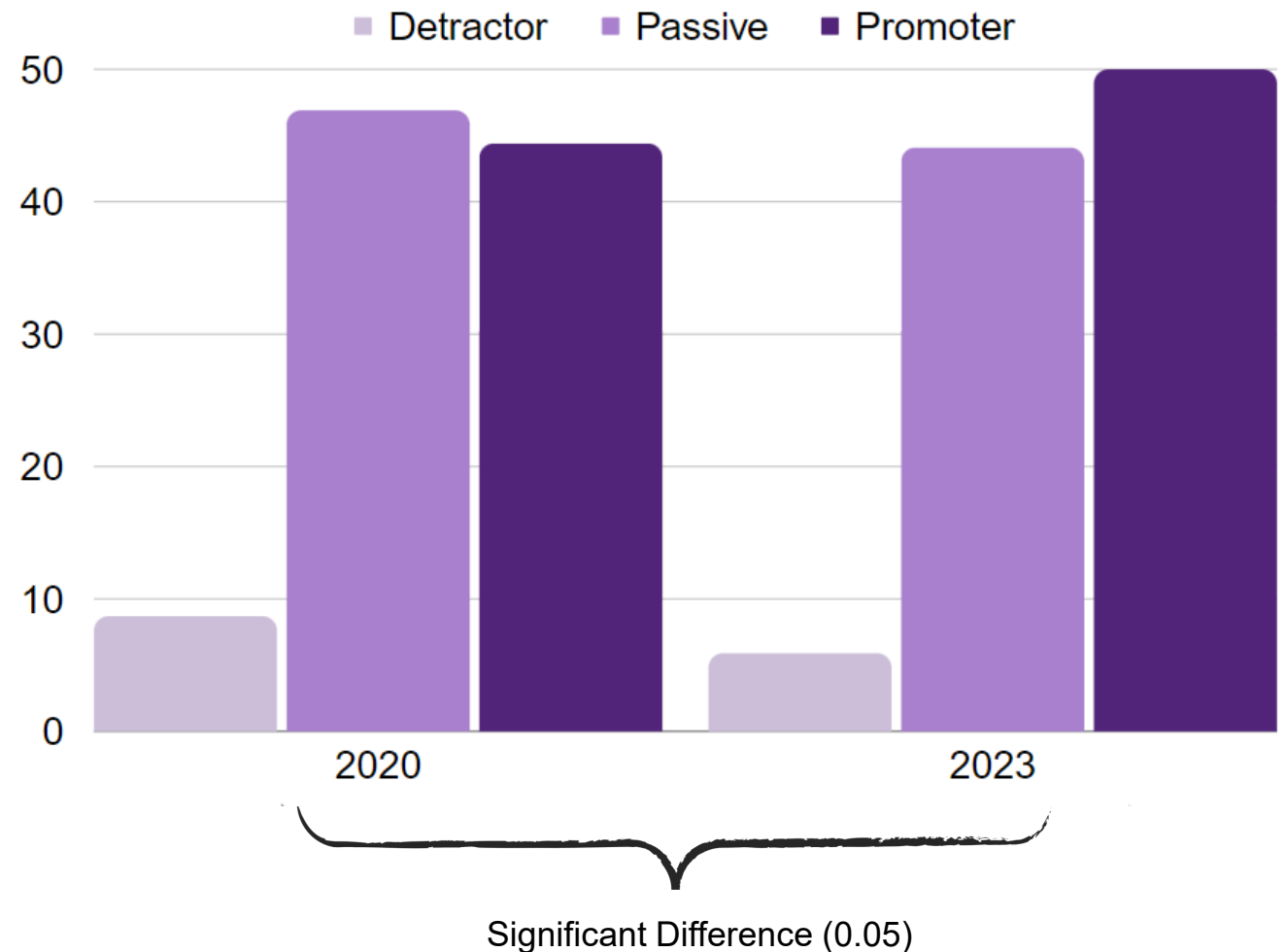


- **Leisure or holiday** is the most common reason for using the trail.
- Most people (58%) who use the Rail Trail use it at least **every three months**; 27% using it **every week**.
- Most people (58%) use the trail for **a few hours to half a day**.
- 28% of participants reported using the trail for **two to three days** at a time.
- **Cyclists** make up 81% of trail users

Satisfaction with the BVRT

Net Promoter Score (NPS)

- **Increase** in Satisfaction from 2020 to 2023
- Mean score of 8.2/10 in 2020 rose to **8.5 in 2023**.
- Satisfaction similar across groups.
- Most (75% in 2020 and 2023) said they would **recommend** the Brisbane-Valley Rail Trail to a friend or family member.



Satisfaction with the BVRT

Promoters (Positives)

“Great trail, fairly easy and safe riding, plenty of places to stop at towns for food drinks, yeh really rate it.”

“We just love the trail, the scenery and the positive, happy people we meet.”

“It's a well-maintained country trail, giving an opportunity to experience country hospitality.”

“Cyclists love a long trail with limited interactions with traffic. The other facilities are very nice, but mostly a bonus addition to being able to ride for hours on end.”

“Lots of different sections to choose from for experienced and those not very experienced, including kids.”

Detractors (Negatives)

“Not that pretty. Poor surface.... Rough areas with gravel in wrong places...”

“Some sections are very good, others such as Harlin's ridiculous detours, Moore's recent unsignposted town bypass, the lack of obvious trail extension into Yarraman and Ipswich, and the trend to expand paved sections into the adventure rail trail are negative impacts on my rating”

“Overall, a really good experience - but I like to think I'm quite a capable cyclist, and I could deal with the culverts. I wouldn't recommend the BVRT to friends that don't ride much.”

“Some parts of the trail would be too difficult to navigate for unskilled riders... not child friendly...”

Information Touchpoints

Websites

- Brisbane Valley Rail Trail Adventures website (42% before; 12% during)
- Department of TMR (23% before; 6% during)
- Experience Somerset website (7% before; 3% during)
- Google Maps (23% before; 33% during)

Social Media

- Facebook and Instagram (33% before; 12% during)
- Travel blogs (e.g. TripAdvisor) (7% before; 1% during)
- Online videos (e.g. YouTube) (10% before; 1% during)

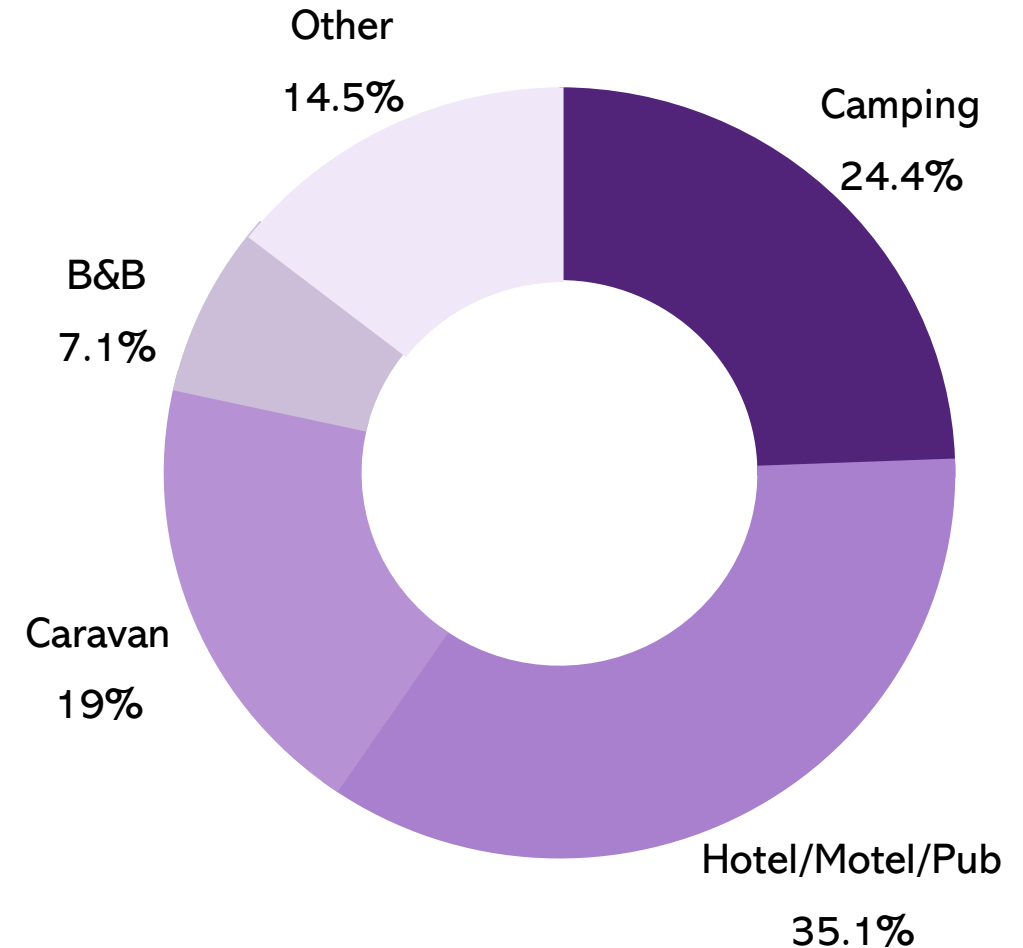
Other

- Physical signage (11% before; 42% during)
- Brochures (18% before; 12% during)
- Visitor information centres (8% before; 5% during)
- Friends or family (31% before; 14% during)
- Local businesses (8% before; 11% during)



Overnight Stays

- About 40% (218) of participants stayed overnight (1-3 nights on average)
- Most booked directly through the provider, either through their website (30%) or by calling or emailing (30%).
- A small number used third-party booking sites and OTAs like booking.com (6%) and AirBnB (2%).



Market Opportunities Analysis

Current Local Visitors (within 150km radius)

Pros

- **High Volume & Repeat Visits:** 76.8% of BVRT users are repeat visitors, especially day-trippers.
- **Stable Returns:** Local visitors are reliable for frequent, consistent use of the trail, providing steady foot traffic and revenue.
- **Cost-Effective Marketing:** Easier to reach through local media and existing tourism channels, reducing marketing spend.

Cons

- **Lower Per-Visit Spend:** Day-trippers spend less per visit (avg. \$96), as they primarily come for short, single-day experiences.
- **Limited Economic Impact:** Without overnight stays, there is reduced demand for accommodation, dining, and other services that boost local revenue.

Interstate/International Visitors

Pros

- **Higher Yield Per Visitor:** These visitors spend more on average (up to \$172/day) and are likely to stay overnight, benefiting local businesses.
- **Extended Stays & Economic Boost:** Longer stays lead to greater spending across accommodation, dining, and entertainment, amplifying economic impact.
- **Potential for Growth:** Opportunities to establish BVRT as a destination for eco-tourism and adventure travel.

Cons

- **Higher Acquisition Cost:** Requires broader marketing efforts, partnerships with tourism boards, and presence on interstate/international platforms, increasing marketing expenses.
- **Infrequent Visits:** Less likelihood of repeat visits compared to local audiences, making them less stable over time.

Market Opportunities Analysis

Strategic Recommendations

- **Balanced Approach:** While local visitors ensure volume and consistency, targeting high-value interstate and international segments boost economic impact through increased per-visitor spend and overnight stays.
- Target Profile Focus
 - **Primary:** Local repeat visitors who provide consistent traffic, best reached through tailored day-trip packages and cycling-friendly amenities. Focus on encouraging overnight stays (short stays/staycations, mid-week stays).
 - **Secondary:** High-income interstate visitors interested in outdoor and eco-tourism, likely to spend on accommodations and unique local experiences.



Accommodation & Attractions

Accommodation Improvements

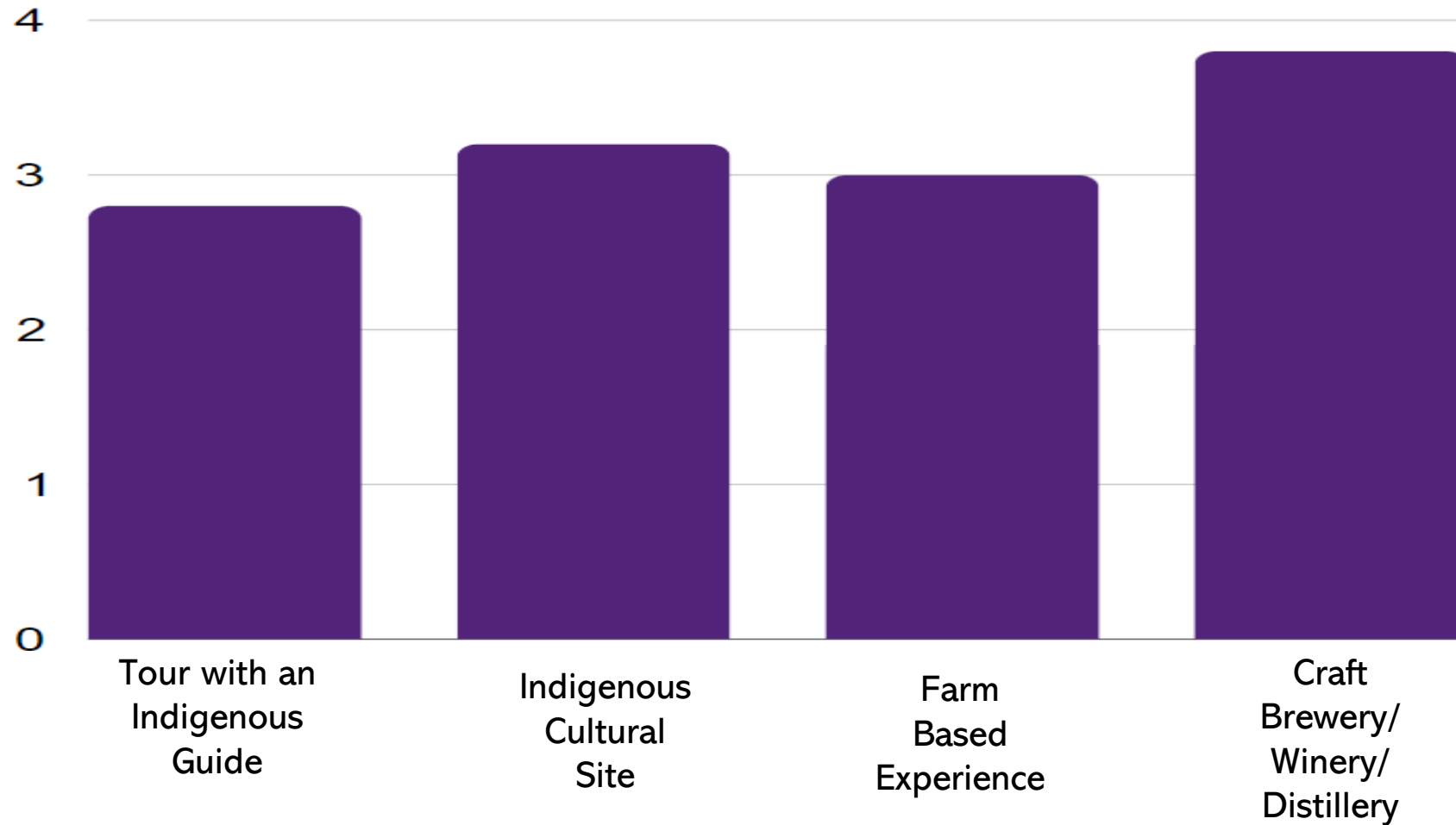
- More accommodation options for markets
- Tent camping options
- Pet-friendly accommodation
- Powered campsites
- Bike lock up and charging
- Shuttle busses

Most Popular Attractions

- Fernvale Bakery (30% reported visiting)
- Lake Wivenhoe (9%)
- Lockwood Gardens (8%)
- Lockyer Creek Bridge (8%)



New Experiences



Food & Dining Experiences

- Most (431) participants purchased food and beverage on their visit
- The most common choices were cafes / pubs / restaurants (60%), with a further 30% ordering take-away during their trip
- Buying groceries also common (42%); Local markets (17%); Food trucks (12%); Friends and family (6%)

Food and Dining Improvements

- Healthier food choices
- Better signage about what is available
- ** More user-centered opening hours**
- Water availability (okay in a few places but not others)
- Cyclist friendly and safe bike parking



Seasonality and Visitation Patterns

Seasonality Patterns

- **Peak Seasons:** Higher visitor numbers in cooler months, school holidays, and weekends due to favourable weather and leisure time.
- **Weekend Dominance:** Most visits occur on weekends; weekday use is lower but still substantial, particularly from local users and couples/singles not constrained by full-time work, school days or holidays.
- **Business Adaptations:** Some businesses along the BVRT diversify their services by hosting events or expanding offerings (e.g., food deliveries/trucks, live music) to counterbalance the effects of seasonality.

Strategic Recommendations

- **Encourage Off-Peak Visits:** Offer incentives, such as discounts or loyalty programs, to encourage weekday and off-season visits, targeting markets less constrained by school holidays and weekdays.
- **Event Marketing:** Increase promotional efforts for special events during low-season or weekdays, drawing more visitors during quiet periods.
- **Flexible Business Hours:** Adjusting hours to align with peak and off-peak visitor patterns can optimise operational costs and maximise visitor spending.

Growing BVRT Tourism



Attract Overnight Visitors: Promote multi-day experience packages that encourage extended stays.



Target Families & Couples: Develop and promote activities and packages tailored specifically to families and couples.



Regularly Update Online Presence: Ensure the BVRT, Experience Somerset, and other key websites (including Google and third-party platforms) are consistently updated with accurate and engaging content.



Optimise Opening Hours: “We are Open for Business!” Align business hours with peak demand periods and maintain consistency on daily, weekly, and seasonal schedules.



Agritourism and Local Experiences: Introduce farm stays, produce-picking, and educational tours for families. Collaborate with local providers on "paddock-to-plate" and unique regional experiences.



Customise Experiences for Different Visitors: Design shorter, active routes for day-trippers and more immersive, multi-day itineraries for overnight visitors.

Operator Interviews – Top 10 Themes

1. COVID-19 as a marketing gift to BVRT
2. BVRT as a critical catalyst
3. Labour and Skills ‘divide’
4. Infrastructure
5. Managerial expertise deficits
6. Seasonality and quiet times
7. Working together as a destination
8. Inflationary pressures
9. Unified marketing (even with other regions or other trails)
10. Accurate signage and historical information.

The Linville Hotel

“Against the advice of many, we took over this business because we saw huge potential in making it a destination for people all over the region to relax and take in the local food, beverage and hospitality... we are so excited about the future....” Tracey, Owner

Business Profile

- Pub, hotel, live music.
- 34 George Street, Linville, Queensland.
- Seats up to 75 people.
- Seats 150 in restaurant, can serve 500+ meals on a busy weekend.
- Open 7 days, lunch and dinner.
- 20 casuals, 1 FT manager, 3 FT chefs on skilled migration visas 17 casuals and hands on owners.
- www.thelinvillehotel.com.au

Key Success Factors

- The pub and meals has been the focus and is hugely successful.
- We have HR backgrounds and have worked hard to create great working conditions to become best practice employers.
- We are present and active on social media (300k outreach)
- Attracting a lot of school students and training them in table/customer service, kitchenhands, food presentation etc.
- Developed systems, procedures and policies to ensure consistency...
- BEDA’s economic development accreditation and the TEQ/BEDA Transformational Experiences Mentoring Program.

Impacts of the BVRT

- Linville was a thriving town in the 1960s – but has spiralled since – the trail has brought the town back to life!
- While at least half of all trade comes from BVRT, focus is to create a ‘go to’ destination from around the region.

Improvements to the Trail

- Mobile phone service a major issue.
- Water, e-bike charging stations and a bike wash stations would go a long way.
- Free campsite nearby does not have electricity
- Better safety measures on trail, eg. automated external defibrillators (AED).
- Clear signage along highway and trail spelling out what Linville has on offer.

Future Plans

- Continued advocacy for investment in BVRT for this area.
- Apply for grants, to expand/upgrade the deck area to make it suitable for events; renovate kitchen, put in a disabled toilet.
- Growth area is in food and beverage and events and off site conferences in off season periods.
- Facilitate a networking in the business community, to come together regularly.

Case Study: Rail Trail Refuge, Linville

- **Overview:** Rail Trail Refuge provides cyclist-focused accommodation along the BVRT, designed for comfort and convenience.
- **Key Features:** Purpose-built amenities like bike racks, e-bike charging stations, and a bike washing station that enhance visitor convenience.
- **Highlights:** Positive guest feedback on its community atmosphere, local advice from staff, and thoughtful amenities like yoga mats.
- **Impact:**
 - Significant repeat visitation for BVRT: 46.5% visited over five times, showing high loyalty.
 - A popular stop that enhances the visitor experience
 - Contributes to longer stays, increasing local spend on food, accommodation, and amenities.



Case Study: Brisbane Valley Roasters, Esk

- **Overview:** Brisbane Valley Roasters serves as a cyclist-friendly café and roastery along the BVRT in Esk.
- **Key Features:**
 - Specialty coffee, locally-sourced menu items, and indoor/outdoor seating.
 - Dedicated facilities for cyclists: bike repair, e-bike charging stations, and ample seating for relaxation.
- **Impact:**
 - Attracts both locals and visitors, enhancing their trail experience.
 - Contributes to local economic activity by encouraging longer stays and repeat visits.



Brainstorming Activity

small groups please

1. Create a "Target Visitor Profile" using BVRT data.
2. Identify one high-ROI visitor segment and discuss how to effectively reach them.

Each group will present their visitor profile and rationale to the audience (if time permits!).



Key Takeaways



Visitor Insights: Data-driven understanding of BVRT demographics, behaviours, and motivations informs strategic decisions.



Local vs. broader Markets: Adopt a balanced approach, leveraging local repeat visitors while attracting high-value tourists with unique, immersive experiences.



Seasonality and Visitation Patterns: Peak visitation in cooler months and weekends; weekday use driven by locals; off-peak promotions and special events can help balance visitor flows.



Enhance the Visitor Experience: Focus on new experiences, amenity improvements, clear signage, and better information access.



Collaboration: Encourage partnerships and cooperation between businesses to create a cohesive and welcoming BVRT experience.



“We are all in this together... there should not be a competition between businesses... If you want a business in this area you have to stay open and ensure the destination meets the needs of trail users....”
(Business Owner)



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CREATE CHANGE

Thank you

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