



Brisbane Valley Rail Trail (BVRT) Visitor Research Program Report



Table of Contents

Project Team	iv
Acknowledgements	v
Executive Summary	viii
1. Background	1
2. Methodology	3
2.1. Methodology at a Glance	3
2.2. Data Sources	3
2.2.1. BVRT Visitor Survey	3
2.2.2. Focus Groups	4
2.2.3. Secondary Data	5
3. Results	6
3.1. Introduction	6
3.2. Visitor Profile	6
3.2.1. Visitor Origin	6
3.2.2. Demographic Profile	7
3.3. Trip Characteristics	9
3.3.1. Reason for visiting the trail	9
3.3.2. Travel party composition	9
3.3.3. Repeat visitation	10
3.3.4. Length of stay	11
3.3.5. Seasonality	12
3.4. Information Touchpoints	13
3.4.1. Information sources	13
3.4.2. Mobile devices used during the visit	14
3.4.3. Information needs	14
3.5. Travel Motivations	15
3.5.1. Motivations for visiting the trail	15
3.6. Visitor Spending	16
3.7. The Visitor Experience	19
3.7.1. Public amenity and facility: IPA analysis	19

3.7.2.	Public amenity and facility: areas to be improved	20
3.7.3.	Transport	21
3.7.4.	Accommodation.....	22
3.7.5.	Primary activity on the trail.....	24
3.7.6.	Trail section visited	25
3.7.7.	Local markets and attractions visited	26
3.8.	Visitor sentiment.....	27
3.8.1.	Visitor Net Promoter Score: Satisfaction	27
3.8.2.	Improving the Experience	28
3.8.3.	Visitor Net Promoter Score: Recommendation.....	31
3.8.4.	The ideal visit.....	33
4.	Next steps	34
	Appendix - Survey Questionnaire	35
	References.....	47

List of Tables

Table 1. Key data sources	3
Table 2. Face-to-face onsite data collection	4
Table 3. Online survey user groups	4
Table 4. Secondary data sources.....	5
Table 5. Visitor origin	6
Table 6. Top postcode clusters for non-local intrastate visitors	6
Table 7. Age and family lifecycle of current visitors	7
Table 8. Socio-demographic profile of current visitors	8
Table 9. Primary reason for visiting the trail	9
Table 10. Travel party composition	9
Table 11. Previous visits, first visit, and visit frequency	10
Table 12. Time spent on the trail.....	11
Table 13. Visitors length of stay at accommodation sites	11
Table 14. Visitors length of stay by family lifecycle.....	11
Table 15. Visitors length of stay by accommodation type	12
Table 16. Seasonality by family lifecycles	12
Table 17. Information sources used by current visitors	13
Table 18. Visitors mobile device use during the visit	14
Table 19. User average spending per stay.....	16
Table 20. Current visitors average spend per day by the length of stay	17
Table 21. Visitors average spend per visit by family lifecycle	17
Table 22. Visitors average spend per visit by accommodation type (\$)	18
Table 23. Transport modes used	21
Table 24. Shuttle bus services used.....	21
Table 25. Accommodation preferences.....	22
Table 26. Detailed comments on accommodation preferences by trail sections	23
Table 27. Primary activity on the trail	24
Table 28. Section of the trail utilised.....	25
Table 29. Local market, major attractions, and information centres visited.....	26
Table 30. Current visitor intentions.....	27
Table 31. Visitors comments on areas of improvements	29
Table 32. Visitors comments on areas of improvements by sections of the trail	29

Table 33. Ideal visit to the BVRT	33
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List of Figures

Figure 1. A map of BVRT	1
Figure 2. Information needs of visitors	14
Figure 3. Importance-Performance analysis ('IPA') of visitor motives	15
Figure 4. Importance-Performance analysis for facility	19
Figure 5. Visitors comments on facility	20
Figure 6. Visitors comments on accommodation	23
Figure 7. Visitor net promoter score - satisfaction	27
Figure 8. Areas of visiting experience can be improved	28
Figure 9. Visitor net promoter score – recommendation	31
Figure 10. Rationale of NPS-Recommendation.....	32
Figure 11. Ideal visit to BVRT.....	33

List of Abbreviations

ABS	Australian Bureau of Statistics
BVRT	Brisbane Valley Rail Trail
CSIRO	Commonwealth Scientific & Industrial Research Organisation
TMR	Department of Transport and Main Roads
TRA	Tourism Research Australia
UQ	The University of Queensland
VFR	Visiting Friends and Relatives

Project Team



Professor Janet McColl-Kennedy
<https://researchers.uq.edu.au/researcher/284>



Associate Professor David Solnet
<https://researchers.uq.edu.au/researcher/805>



Associate Professor Pierre Benckendorff
<https://researchers.uq.edu.au/researcher/2336>



Professor Brent Ritchie
<https://researchers.uq.edu.au/researcher/2051>

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- Dr. Isabella Ye

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Executive Summary

Background

The Brisbane Valley Rail Trail (BVRT) follows the old Brisbane Valley railway line from Wulkuraka in Ipswich to Yarraman. Recent rehabilitation projects have connected different sections of the trail, opening the full 161km trail to a range of non-motorised recreational opportunities from walking, riding to horseback adventures.

The University of Queensland Business School's Service Innovation Alliance (SIA) team was engaged by Somerset Regional Council and the Department of Transport and Main Roads (TMR) to support further development and investment decisions by way of a Visitor Research Program.

The **purpose** of this program is to collect data from a range of sources to better understand the user market and needs. The research presented in this report provides insights into market awareness, the user experience, user motives, behaviour, and spending patterns. This report summarises the key findings from the data collection period, which took place between April 2020 and December 2020, and provides suggestions and insights following a Somerset Regional Council Workshop Discussion on 9 June 2021.

Methodology

The project methodology draws on **three data sources**, including the **BVRT Visitor Surveys** collected from both onsite users and online through various community and user groups; **focus groups** with both current users and non-users from various user groups; and **secondary data**. The use of multiple data sources allows for the development of a more comprehensive profile of current visits. The data collection plan ensures coverage of current local, intrastate, and interstate users of the rail trail. The project is organised into one data collection round between April 2020 and Dec 2020. This report summarises the key findings from the data collection.

Key Findings

Findings are organised around seven major sections that address key questions about current visitors and their needs:

1. Visitor Profile: Who are the visitors to the BVRT?
2. Trip Characteristics: Why do visitors come to the trail? How much time do visitors spend on the trail? How often do visitors use the trail? When do visitors use the trail?
3. Information Touchpoints: What information sources do visitors use before and during the visit? What devices do visitors use? What additional information can be provided?
4. Travel Motivations: What motives drive visitation to BVRT? How well does the trail perform?
5. Visitor Spending: How much do visitors spend?
6. Visitor Experience: What transport and accommodation do visitors use? What major sections, markets and attractions do users visit? What is the visitor experience like with facilities?
7. Visitor Sentiment: How satisfied are users with the trail experience? What aspects of the experience can be improved? What does an ideal visit of the trail looks like?

Recommendations

Five key recommendations are made based on the findings from the data.

Recommendation 1: Management and coordination

Given the diverse needs of each of different user groups, as well as the different experiences offered by the different sections of the trail, it is suggested that TMR considers establishing an BVRT Advisory Board with representation from TMR, local councils and different user groups and local communities. The role of the Advisory Board should be to support the management, marketing, and strategic development of BVRT experiences.

Recommendation 2: Infrastructure enhancements

There is a need for investment to improve facilities and amenities that will directly enhance the visitor experience. Key suggestions include the need for more (or better located) shaded areas, watering points, rubbish bins, picnic spots, and other public amenities. The trail surface, signage, road crossings, and food and beverage offerings were also identified as areas of concern – although these issues often relate to specific sections of the trail that are under-serviced.

Recommendation 3: Interpretive experiences

There are opportunities to improve interpretive signage and experiences on the trail to present local history, rail heritage, indigenous heritage and unique flora and fauna. Learning about the trail, experiencing new things, and meeting other visitors were identified as important motives. Interpretation could also be delivered through a mobile app (see Recommendation 5 below).

Recommendation 4: Enhancing economic benefits

While the data in this report do not represent a detailed economic impact assessment, the research does identify significant opportunities to enhance the economic benefits of the trail for local communities. For example, a more cohesive and coordinated approach to marketing and listing relevant businesses (i.e., food, accommodation, retail, shuttle service) to Google Maps including contact details and hours of operation would make it easier for users to locate services along the trail. Targeting high yield segments such as couples to maximise economics benefit and developing infrastructure and experiences to cater to these markets should also be considered. Existing accommodation and facilities (i.e., showgrounds, campgrounds) could be leveraged to encourage more overnight stays. Visitation is somewhat seasonal and economic benefits can be enhanced by improving infrastructure and staging events and experiences during less frequently visited warmer months. These observations indicate that a detailed economic impact assessment should also be conducted.

Recommendation 5: Integrated marketing and communications

There is clearly a need for an integrated marketing and communications campaign targeting high yield market segments. There are opportunities to optimise communications and messaging to take advantage of social media. Areas to consider include interactive maps and/or apps (using QR codes) that contain critical information, including trail surface conditions, magpie hotspots, section distances, locations of facilities, points of interests, businesses opening hours, accommodation, shuttle services drop-off and pick-up locations, and parking locations for each trail section. Effort is needed to ensure that the content displays well on a range of different devices and platforms by following Responsive Web Design (RWD) principles to cater for visitors' heavy use of mobile devices for information and navigation. Partnering with local telecommunication providers to improve the mobile phone connectivity along the trail would enable additional information services and potentially enhanced experiences.

A marketing campaign focussing on connecting with nature, rejuvenating from the stress of city life and reconnecting with family and friends would align well with current visitor motives and the attributes of the trail. Developing initiatives to package and encourage more overnight stays, holding more special events and extended weekend packages would increase visitation. A supply-side product audit of key visitor attractions, accommodation and amenities would offer provide a basis for developing themed packages and experiences (i.e., paddock to plate, rural escape, short breaks, adventure and fitness) for specific market segments. Efforts to attract more locals could include further enhancements to exercise and fitness activities.

1. Background

The Brisbane Valley Rail Trail (BVRT) follows the disused Brisbane Valley railway line that commenced construction at Wulkuraka near Ipswich in 1884 and was completed at Yarraman in 1913. The BVRT winds its way along the western side of the Brisbane River traversing farm land, forests, picturesque rural settings and country towns (Figure 1). Recent rehabilitations projects have connected different sections of the trail, opening the full 161km trail to a range of non-motorised recreational opportunities.

The Department of Transport and Main Roads is the state agency responsible for the day-to-day management and maintenance of the BVRT in conjunction with Ipswich City Council, Somerset, South Burnett and Toowoomba Regional Councils, and The Ambassadors of the BVRT– Moore Linville Benarkin Blackbutt Inc.

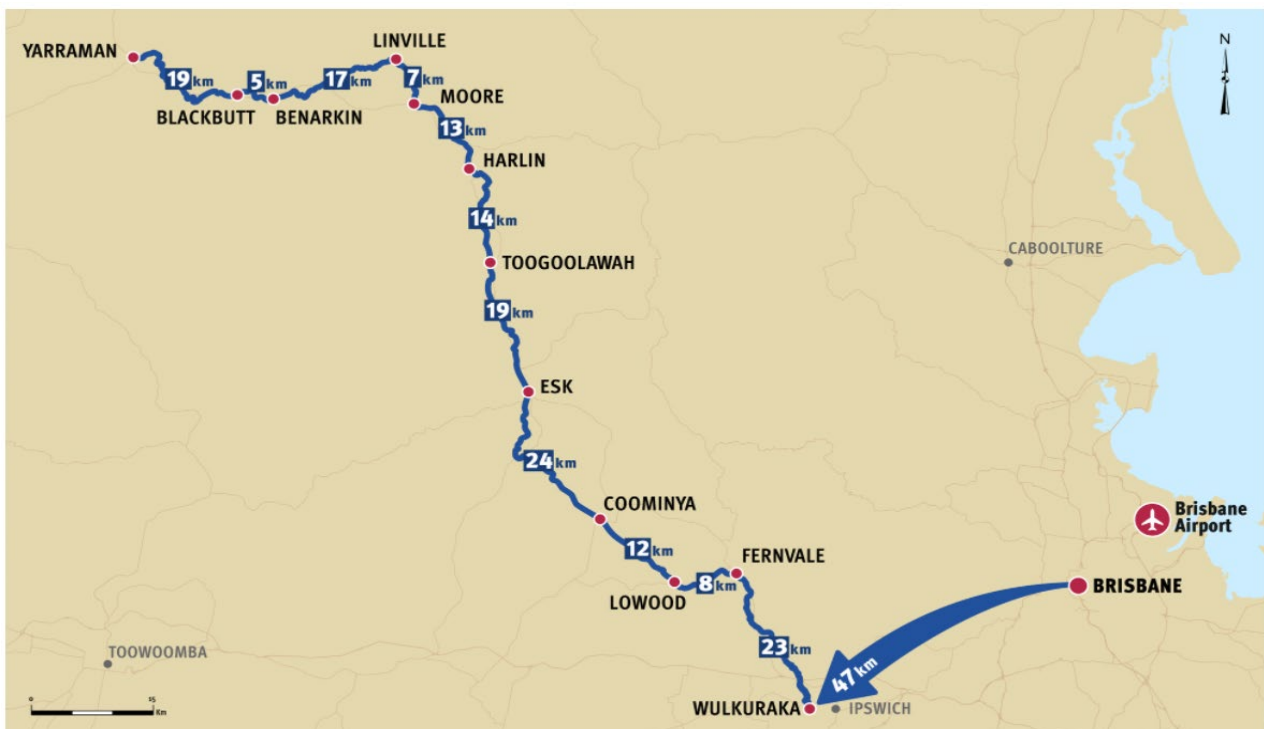


Figure 1. A map of the BVRT (Source: TMR, 2021)

Major BVRT projects have been conducted to improve the safety and experience of trail users. Themed signage, interpretation, and online information (e.g., [https:// www.tmr.qld.gov.au/ BVRT](https://www.tmr.qld.gov.au/BVRT)) have been introduced to raise awareness of the trail. Counters are used by both local and state governments to monitor usage levels on different sections of the trails, but rigorous and reliable market research is needed to better understand existing and potential trail users.

The University of Queensland Business School's Service Innovation Alliance (SIA) team was engaged by the Somerset Regional Council and the Department of Transport and Main Roads (TMR) to support further development and investment decisions by way of a Visitor Research Program.

The **purpose** of this project was to collect data from a range of sources to better understand the user market and needs. The research presented in this report provides insights into market awareness, user experience, user motives, behaviour, and spending patterns.

Insights obtained through the project will inform various stakeholder activities, initiatives and projects designed to:

- Enhance the overall visitor experience, boosting visitor numbers by attracting new and retaining existing visitors;
- Drive future marketing, infrastructure/services planning to ensure that BVRT is positioned to capitalise on tourism growth as it occurs; and
- Increase trail use and growing visitor spending to create economic opportunities for businesses and communities.

These insights are aligned with the tourism strategy objective as specified in Somerset Regional Council's five-year plan "to promote Somerset as a premier regional visitor destination defined by a diversity of authentic experiences built on its natural features, iconic attractions and its recreational, heritage and cultural assets". The insights will also support the vision to become "Australia's greatest rail trail, offering a diverse range of outdoor adventures and challenges" (Dept. of Transport and Main Roads, 2021).

This report is the final report summarising the key findings from the data collection period, which took place between April 2020 and December 2020, and provides suggestions and insights following the Somerset Regional Council Workshop Discussion on 9 June 2021.

2. Methodology

2.1. Methodology at a Glance

The project methodology draws on **three data sources** as shown in Table 1: secondary data; visitor surveys; and focus groups. Use of multiple data sources allows for the development of a more comprehensive profile of current visits. The data collection plan was designed to ensure coverage of current local, intrastate, and interstate users of the rail trail.

Table 1. Key data sources

Data Source	Description	Insights
Secondary Data	Desktop audit of existing data sources, including trail counters (2019, on Fernvale and Esk), statistics, research report, strategic plan, and consultancy reports.	<ul style="list-style-type: none"> Baseline data Comparative statistics Long term trends Visitor numbers, trends and seasonality
Visitor Surveys Field survey (N=133, Aug 2020 - Oct 2020) Online Panel (N=638, April 2020 – June 2020)	<p>Field surveys were administered and collected through multiple means, including in the field by trained research assistants by intercepting users at high-volume entry and exit points along the trail.</p> <p>Online surveys collected through various community and user groups to capture users who may not be on the trail when surveys are being collected in the field.</p>	<ul style="list-style-type: none"> Awareness of the trail and key attractions Awareness of information sources User motives, behaviour, preferences Constraints and facilitators for visitation Transport use Expenditure and length of stay Market segments Satisfaction and repeat visitation
Focus Groups Nov 2020 to Dec 2020 Horse Rider (N=3) Cyclists (N=5) Non-Users (N=6)	Three focus groups were undertaken with different user groups (i.e., cyclists, horse riders and non-users) to provide a more nuanced understanding of the insights identified through the surveys.	<ul style="list-style-type: none"> Awareness of the trail and key attractions Information sources User motives, behaviour, preferences Constraints and facilitators for visitation

2.2. Data Sources

2.2.1. BVRT Visitor Survey

The BVRT User Survey was developed to understand the characteristics and preference of current visitors to the trail. The survey data was collected from: face-to-face onsite; and online surveys with interest user groups.

The face-to-face onsite survey was administered between August 2020 to October 2020. A copy of the questionnaire is provided in the Appendix. Visitors were intercepted at high-volume entry and exit points along the trail to collect email contact details for a follow-up online survey. Surveys were collected on three different days, including weekends and public holidays to reach a wide range of visitors. Table 2 provides a summary of data collection locations and dates.

Table 2. Face-to-face onsite data collection

Date of data collection	Emails Collected	Location
Friday 14 August 2020 (Ekka Public Holiday) (8:30am – 11:30am)	39	Fernvale Futures Centre
	38	Pipeliners Park – Esk
Saturday 19 September 2020 (8am – 11am)	38	Fernvale Futures Centre
	13	Toogoolawah
Saturday 26 September 2020 (8:30am – 11:30am)	27	Linville
	16	Pipeliners Park – Esk
Total	171	

The online survey was administered between mid-May 2020 to mid-July 2020 in a staged approach to select user groups via Qualtrics using trackable links. User groups distributed the unique link via social media to their followers. Each special interest user group was provided with a unique trackable link. Table 3 provides a summary of the number of responses from each special interest user group.

Table 3. Online survey user groups

Date Set Up	User Group	Responses
16-Apr-20	Pilot Testing with Council	13
12-May-20	The Australian Trail Horse Riders Association (ATHRA)	50
12-May-20	The Ambassadors of the Brisbane Valley Rail Trail	1
12-May-20	BVRT Users Association	246
12-May-20	Esk Caravan Park/Brisbane Valley Rail Trail Motel	1
12-May-20	Friends of the Brisbane Valley Rail Trail (FoBVRT)	98
12-May-20	Out There Cycling	27
14-May-20	Rail Trails Australia	43
18-May-20	Somerset Regional Council	19
1-Jun-20	AAA Racing	2
1-Jun-20	Bicycle Queensland	82
1-Jun-20	Bushwalking Queensland	0
1-Jun-20	Gonya Adventures	15
1-Jun-20	Queensland Outdoor Recreation Federation (QORF)	2
15-Jun-20	Department of Transport and Main Roads	1
15-Jun-20	South Burnett Regional Council	0
15-Jun-20	Toowoomba Regional Council	6
15-Jun-20	Ipswich City Council	30
15-Jun-20	Tourism & Events Queensland	2
	Total	638

2.2.2. Focus Groups

Three focus groups were conducted with visitors and non-visitors across different user groups in November and December 2020 to further identify visitors experience and needs. The horse riders focus group consisted of three participants. The cyclists focus group consisted of five participants. A focus group was also conducted with non-visitors to explore their perception of the BVRT and to identify their perceived constraints to visiting the trail. These focus group sessions provided further insights into some of the patterns identified through the surveys. The results are integrated throughout this report with the survey findings.

2.2.3. Secondary Data

A desktop audit was conducted to identify existing data sources such as statistics and visitor numbers of the trail. An initial scan of available information and reports was conducted prior to survey work to identify baseline data and gaps in knowledge. Secondary data presented in this report were collected from the sources shown in Table 4.

Table 4. Secondary data sources

Source	Year	Type	Provider
Somerset Tourism Strategy 2021-2025	2021	Report	Somerset Regional Council
Brisbane Valley Rail Trail Strategic Plan	2021	Report	Department of Transport & Main Roads
Tourism Research Australia	2021	Data	Australian Government Austrade
The Future of Tourism in Queensland	2013	Report	CSIRO
Brisbane Valley Rail Trail Business Case	NA	Report	Somerset Regional Council
Somerset Region Destination Management Plan & Destination Marketing Brand	2014	Report	The Stafford Group
Counters on the BVRT in 2019	2019	Data	Somerset Regional Council

3. Results

3.1. Introduction

The findings from all three data sources are organised into seven sections that answer key questions about current visitors and their needs:

1. **Visitor Profile:** Who are the visitors to the BVRT?
2. **Trip Characteristics:** Why do visitors come to the trail? How much time do visitors spend on the trail? How often do visitors use the trail? When do visitors use the trail?
3. **Information Touchpoints:** What information sources do visitors use before and during the visit? What devices do visitors use? What additional information can be provided?
4. **Travel Motivations:** What motives drive visitation to BVRT? How well does the trail perform?
5. **Visitor Spending:** How much do visitors spend?
6. **Visitor Experience:** What transport and accommodation do visitors use? What major sections, markets, and attractions do users visit? What is the visitor experience like with facilities?
7. **Visitor Sentiment:** How satisfied are users with the trail experience? What aspects of the experience can be improved? What would an ideal visit to the trail look like?

3.2. Visitor Profile

The visitor profile provides insights into visitor origin, visitors numbers, and demographics.

3.2.1. Visitor Origin

Table 5. Visitor origin

State	Frequency	Percent
Queensland	482	94.5%
New South Wales	21	4.1%
Victoria	6	1.2%
South Australia	1	0.2%
Not specified	8	1.5%
Visitors from outside/within BVRT Local Government Areas (LGAs)		
Non-locals: visitors from outside BVRT LGAs	427	82.3%
Locals: visitors from within BVRT LGAs*	92	17.7%

Notes: *Local visitors with postcodes of 4305, 4306, and 4312. Source: BVRT Visitor Survey

Table 6. Top postcode clusters for non-local intrastate visitors

Regions	Top Postcodes	Frequency	Percent
South Brisbane	4075, 4074, 4101, 4103, 4104	103	25.7%
North Brisbane	4053, 4066, 4069, 4070, 4034	79	19.7%
Ipswich and neighbouring area	4300, 4301, 4343, 4341, 4340	33	8.2%
Logan City	4123, 4128, 4129	20	2.6%
Total		235	56.2%

Source: BVRT Visitor Survey

- There were no international visitors to the trail due to Covid-19 international travel restrictions.
- Most visitors who provided a postcode (**94.5%**) originated from Queensland and **82.3%** of visitors are from outside BVRT LGAs.
- An analysis of **postcodes** reveals that domestic source markets are concentrated mainly around Southeast Queensland.
- Geographically, the trail is most accessible from **outer suburbs in South Brisbane**, and it was not surprising to see 25.7% of visitors originating from these suburbs, followed by visitors from **Northern Brisbane** suburbs (19.7%).

3.2.2. Demographic Profile

Table 7. Age and family lifecycle of current visitors

	Non-Locals			Locals*		
	Day Trippers	Overnight Stays	Total	Day Trippers	Overnight Stays	Total
Age	n=260	n=153	n=413	n=86	n=4	n=90
18 to 25**	0.8%	4.6%	2.2%	0.0%	25.0%	1.1%
26 to 35	4.2%	2.6%	3.6%	12.8%	25.0%	13.3%
36 to 45	18.8%	11.8%	16.2%	19.8%	0.0%	18.9%
46 to 55	31.5%	19.6%	27.1%	34.9%	0.0%	33.3%
56 to 65	33.1%	36.6%	34.4%	20.9%	25.0%	21.1%
Over 65	11.5%	24.8%	16.5%	11.6%	25.0%	12.2%
Family Lifecycle	n=255	n=146	n=401	n=83	n=4	n=87
Younger Singles	5.1%	8.2%	6.2%	4.8%	25.0%	5.7%
Younger Couples	11.8%	6.2%	9.7%	12.0%	25.0%	12.6%
Full Nester I (Pre-school)	4.3%	2.1%	3.5%	4.8%	0.0%	4.6%
Full Nester II (Primary)	17.6%	15.8%	17.0%	33.7%	0.0%	32.2%
Full Nester III (Secondary)	47.1%	46.6%	46.9%	32.5%	50.0%	33.3%
Empty Nesters	9.8%	15.1%	11.7%	10.8%	0.0%	10.3%
Older Singles	4.3%	6.2%	5.0%	1.2%	0.0%	1.1%

Note: *As per Table 6, locals means visitors with postcodes of 4305, 4306, and 4312. **University ethical guidelines prevented us from surveying visitors aged under 18.

Source: BVRT Visitor Survey.

- The age profile indicates that the survey captured more mature age visitors but fewer young visitors. Overall, **60%** of survey respondents were **aged between 46 and 65 years**, with a **median age of 55 years**.
- Overnight users (median age = 53 years) were slightly younger than day trippers (median age = 58 years).
- The demographic profile is consistent with a key marketing aim of BVRT to accommodate family groups
- Among non-local visitors, **67%** of visitors surveyed were '**Full Nesters**', with a majority including families with secondary school-aged children. This suggests that people are more likely to visit the trail on the weekend, public holidays, and school holidays.

Table 8. Socio-demographic profile of current visitors

	Non-Locals			Locals		
	Day Trippers	Overnight Stays	Total	Day Trippers	Overnight Stays	Total
Annual Household Income	n=264	n=150	n=414	n=86	n=4	n=90
Less than \$50,000	6.8%	8.0%	7.2%	12.8%	-	12.2%
\$50,001 to \$80,000	10.2%	20.0%	13.8%	9.3%	25.0%	10.0%
\$80,001 to \$110,000	16.3%	13.3%	15.2%	18.6%	25.0%	18.9%
\$110,001 to \$140,000	9.8%	12.0%	10.6%	19.8%	25.0%	20.0%
\$140,001 to \$170,000	11.7%	5.3%	9.4%	10.5%	-	10.0%
\$170,001 to \$200,000	8.3%	5.3%	7.2%	3.5%	-	3.3%
Above \$200,000	12.5%	13.3%	12.8%	10.5%	25.0%	11.1%
Prefer not to say	24.2%	22.7%	23.7%	15.1%	-	14.4%
Employment Status	n=265	n=154	n=419	n=88	n=4	n=92
Unemployed	-	0.6%	0.2%	3.4%	-	3.3%
Studying	0.4%	0.6%	0.5%	1.1%	-	1.1%
Working part-time	8.7%	12.3%	10.0%	3.4%	25.0%	4.3%
Working full-time	69.1%	56.5%	64.4%	64.8%	25.0%	63.0%
Retired	16.2%	29.2%	21.0%	18.2%	25.0%	18.5%
Prefer not to say	2.6%	-	1.7%	5.7%	-	5.4%
Other	3.0%	0.6%	2.1%	3.4%	25.0%	4.3%

Source: BVRT Visitor Survey

Note: The traditional family lifecycle stages include younger singles (no children, living on their own or with friends), younger couples (below 55, no children, living with their partner), full nester I (families with children aged below 5), full nester II (families with children aged between 6 and 12), full nester III (families with older children aged 13 or older), empty nesters (older, living with partner), and older singles (over 55, living alone).

- The social-demographic profile indicated that most trail visitors were employed **full-time (64.4%)** and were generally **middle-income earners**. This has implications for when people access the trail - i.e., primarily after hours and on weekends/public holidays.
- The most common **household income** categories for non-local visitors being \$50,001 to \$110,000 (29%) and above \$200,000 (12.8%).

3.3. Trip Characteristics

The trip characteristics provide insights into reasons for visiting the trail, travel party composition, visitation, time spent on the trail, length of stay at the accommodations, and seasonality.

3.3.1. Reason for visiting the trail

Table 9. Primary reason for visiting the trail

	Non-locals		Locals		Total	
	Frequency	Percent	Frequency	Percent	Frequency	Percent
Attending an event	21	4.9%	1	1.1%	22	4.2%
Holiday/leisure	265	62.1%	38	41.3%	303	58.4%
Visiting friends or relatives	10	2.3%	3	3.3%	13	2.5%
Education or school/university group or research	2	0.5%	-	-	2	0.4%
Meeting up with a social club/group	62	14.5%	10	10.9%	72	13.9%
Exercise/fitness	67	15.7%	40	43.5%	107	20.6%

Source: BVRT Visitor Survey

- The trail is predominantly used for **leisure by non-local visitors** (62.1%) and **exercise by locals** (43.5%). This has implications for local markets, i.e., interpretation and equipment focusing on exercise and fitness activities (i.e., outdoor gyms).

3.3.2. Travel party composition

Table 10. Travel party composition

	Non-locals		Locals		Total	
	Frequency	Percent	Frequency	Percent	Frequency	Percent
Visiting alone	62	14.8%	21	23.6%	83	16.4%
Visiting with partner	92	22.0%	16	18.0%	108	21.3%
Visiting with partner and children	20	4.8%	16	18.0%	36	7.1%
Visiting with extended family	21	5.0%	4	4.5%	25	4.9%
Visiting with a group of friends	158	37.8%	13	14.6%	171	33.7%
School/university group	1	0.2%	-	-	1	0.2%
Visiting with a club/society	18	4.3%	3	3.4%	21	4.1%
Organised tour or group	17	4.1%	2	2.2%	19	3.7%
Visiting children	9	2.2%	8	9.0%	17	3.4%
Other*	20	4.8%	6	6.7%	26	5.1%

Notes: *colleagues, a single friend, or dog. Source: BVRT Visitor Survey

- The vast majority of visitors were **free independent travellers (FITs)**¹.
- The most common **travel party composition** included **groups of friends** (37.8%) or **partners** (22.0%). This has implications for future infrastructure decisions. i.e., tables or seats for groups to use/meet/encourage social interaction.

¹ FITs are solo, couple or family travellers planning their own travel itineraries without the assistance of a group tour or pre-arranged schedule.

3.3.3. Repeat visitation

Table 11. Previous visits, first visit, and visit frequency

	Non-locals		Locals		Total	
	Frequency	Percent	Frequency	Percent	Frequency	Percent
Previous Visits						
First time	89	20.9%	5	5.4%	94	18.1%
Once before	54	12.7%	4	4.3%	58	11.2%
2 to 5 times	112	26.3%	13	14.1%	125	24.1%
More than 5 times	171	40.1%	70	76.1%	241	46.5%
First Visit						
2020s	26	10.7%	7	11.9%	33	11%
2010s	205	84.7%	46	78.0%	251	83.4%
2000s	9	3.7%	5	8.5%	14	4.7%
1990s	2	0.8%	1	1.7%	3	1.0%
Trip Frequency						
Daily	3	0.9%	7	7.6%	10	2.4%
Weekly	25	7.6%	38	44.2%	63	15.1%
Monthly	47	14.2%	21	24.4%	68	16.3%
Every 2-3 months	80	24.2%	12	14.0%	92	22.1%
Every 4-6 months	97	29.3%	5	5.8%	102	24.5%
Once a year	79	23.9%	3	3.5%	82	19.7%

Source: BVRT Visitor Survey

- Overall, only 18.1% of visitors indicated that they had visited the trail once, indicating a very **high level of repeat visitation**. This also suggests that there is some potential to **attract new visitors**.
- The results indicate very high rates of repeat visitation for locals and non-locals, with 40.1% of non-local visitors and 76.1% of locals having **visited the trail more than five times**.
- The majority of non-local visitors have been using the trail for a considerable period of time, with 84.7% visiting the trail since the 2010s.
- Visiting the trail is a regular activity for many trail users, with the majority of non-local visitors indicating that they visited the trail at least every 4-6 months (29.3%).
- An analysis of visitors' postcodes suggests that the **close proximity** of the trail to current trail users explains the high rate of repeat visitation (see Table 6).

3.3.4. Length of stay

Table 12. Time spent on the trail

	Non-locals		Locals		Total	
	Frequency	Percent	Frequency	Percent	Frequency	Percent
One or two hours	36	8.5%	50	54.3%	86	16.6%
Half day	180	42.4%	34	37.0%	214	41.4%
A full day	54	12.7%	4	4.3%	58	11.2%
Two days	54	12.7%	1	1.1%	55	10.6%
Three days	58	13.6%	1	1.1%	59	11.4%
Other*	43	10.1%	2	2.2%	45	8.7%

Notes: *range from four days to ten days. Source: BVRT Visitor Survey

- The majority of non-local visitors were day trippers, spending on average half a day on the trail (42.4%), whereas locals predominately spent one or two hours per visit (aligned with prior observations of locals using the trail primarily for health and fitness activities).

Table 13. Visitors length of stay at accommodation sites

	Non-locals		Locals		Total	
	Frequency	Percent	Frequency	Percent	Frequency	Percent
1 night	39	27.9%	3	50.0%	42	29.0%
2 nights	45	32.1%	3	50.0%	48	33.1%
3 nights	22	15.7%	-	-	22	15.2%
4 nights	10	7.1%	-	-	10	6.9%
5-7 nights	15	10.7%	-	-	15	10.3%
More than 7 nights	8	5.7%	-	-	8	5.5%

Source: BVRT Visitor Survey

- Overnight visitors stayed for **2.75 nights** on average during their visits.
- One-night stays were of lower frequency than two nights; those who committed to staying overnight generally stayed for at least two nights (32.1%).

Table 14. Visitors length of stay by family lifecycle

Overnight Stays Visitors	Young Singles	Couples	Full Nest I	Full Nest II	Full Nest III	Empty Nest	Older Singles
Day trippers (N=360)	73.3%	80.0%	88.9%	74.0%	65.4%	61.4%	52.4%
Overnight stays (N=159)	26.7%	20.0%	11.1%	26.0%	34.6%	38.6%	47.6%
1 night	14.3%	33.3%	-	47.8%	31.4%	-	22.2%
2 nights	28.6%	66.7%	100.0%	34.8%	28.6%	36.8%	22.2%
3 nights	14.3%	-	-	8.7%	20.0%	21.1%	-
4 nights	14.3%	-	-	4.3%	5.7%	10.5%	22.2%
5-7 nights	14.3%	-	-	0.0%	12.9%	21.1%	-
More than 7 nights	14.3%	-	-	4.3%	1.4%	10.5%	33.3%
Mean Nights	4.00	1.67	2.00	2.09	2.56	3.68	4.44

Source: BVRT Visitor Survey

- The groups most likely to stay overnight were older singles, older couples ('Empty Nesters'), and families with older children (Full Nesters III).

- Younger families (Full Nesters I), young couples, and young singles tended to prefer day trips.
- Among overnight stays, older singles, younger singles, and older couples tended to prefer longer overnight stays (around 4 nights), while families tended to prefer shorter overnight stays (around 2 nights).
- The analysis of length of stay across FLCs has implications for the types of 'packages' that need to be created/promoted to cater to different visitor groups.

Table 15. Visitors length of stay by accommodation type

	Camping	Caravan Park	Cabin	Caravan	B&B	VFR	Hotel/Motel	Multiple	Other*
1 night	27.3%	72.7%	25.0%	28.6%	46.7%	0.0%	39.1%	33.3%	2.3%
2 nights	40.9%	0.0%	50.0%	14.3%	46.7%	66.7%	47.8%	33.3%	27.9%
3 nights	13.6%	27.3%	25.0%	42.9%	0.0%	0.0%	0.0%	8.3%	25.6%
4 nights	4.5%	0.0%	0.0%	0.0%	6.7%	0.0%	8.7%	0.0%	14.0%
5-7 nights	4.5%	0.0%	0.0%	14.3%	0.0%	0.0%	4.3%	16.7%	20.9%
More than 7 nights	9.1%	0.0%	0.0%	0.0%	0.0%	33.3%	0.0%	8.3%	9.3%
Mean Nights	2.68	1.55	2.00	2.57	1.67	4.67	1.91	2.56	3.25

Notes: *local pubs or showgrounds. Source: BVRT Visitor Survey

- Aside from users who were visiting friends and relatives (VFR), campers and caravan users tended to prefer longer stays.
- Visitors who used multiple accommodation sites and those staying at local pubs or showgrounds tended to stay longer.
- Hotel/motel, B&B, and caravan park guests had the shortest length of stay.

3.3.5. Seasonality

Table 16. Seasonality by family lifecycles

	J	F	M	A	M	J	J	A	S	O	N	D
Young Singles	5%	4%	8%	10%	11%	9%	11%	11%	11%	9%	5%	4%
Couples	5%	5%	6%	10%	12%	13%	12%	12%	9%	8%	5%	4%
Full Nester I	5%	5%	7%	12%	12%	9%	11%	8%	8%	11%	5%	5%
Full Nester II	7%	6%	7%	11%	10%	10%	10%	8%	10%	8%	7%	6%
Full Nester III	5%	5%	8%	10%	12%	11%	11%	10%	11%	8%	6%	4%
Empty Nester	4%	4%	8%	11%	12%	11%	10%	11%	11%	9%	6%	4%
Older Singles	2%	2%	4%	10%	12%	13%	14%	16%	12%	6%	4%	3%

Source: BVRT Visitor Survey

- Visitors are sensitive to seasonal variations, with most visits concentrated in cooler months, particularly in May, June, and July.
- Focus groups and qualitative comments in the survey highlight issues such as a lack of shaded areas and watering points along the trail, and aggressive magpies during warmer months.

3.4. Information Touchpoints

Information touchpoints indicators include information sources uses by current both before and during their visit, devices used, and their information needs.

3.4.1. Information sources

Destination awareness is shaped by information sources available to potential users. Current visitors were asked to indicate information sources they used before and during their visit².

Table 17. Information sources used by current visitors

Information Sources	Before	During
Brisbane Valley Rail Trail website (www.brisbanevalleyrailtrail.com.au)	72.2%	14.0%
Google or Google Maps	50.8%	19.0%
Social media (e.g. Facebook, Instagram)	46.0%	11.7%
Family or friends	34.9%	15.1%
Department of Transport and Main Road website (www.tmr.qld.gov.au/bvrt)	23.2%	2.5%
Brochures or visitor guides	22.0%	13.6%
Local businesses or residents	12.6%	14.9%
Visitor information centre	11.3%	9.6%
Experience Somerset website (www.experiencesomerset.com.au)	9.4%	1.1%
Online videos (e.g. YouTube)	9.2%	0.4%
Travel blogs, forums or review sites (e.g. TripAdvisor)	8.0%	1.9%
Billboards or signage	5.4%	18.6%
Newspapers or magazines	1.3%	0.2%
Motoring club (e.g. RACQ, NRMA)	0.8%	0.2%
Television or radio	0.8%	0.2%
Other	7.7%	4.2%

Source: BVRT Visitor Survey

- The Brisbane Valley Rail Trail Website (user-generated), Google/Google Maps, social media, and family and friends were the most used information sources prior to visiting the trail.
- Regarding the BVRT website, current visitors indicated confusion around the TMR website and Brisbane Valley Rail Trail website. A few visitors mentioned that some information on Brisbane Valley Rail Trail website was out-of-date and incorrect. This issue is likely to be resolved as TMR has improved its online presence for the BVRT as a definitive and official source of information (BVRT Strategic Plan, 2021).
- During the trip, visitors primarily relied on Google/Google Maps and signage for information and direction.

² Note that at the time the survey was administered, visitors could not yet access the current updated TMR webpage (2021).

- Heavy reliance on Google Maps highlights the importance of ensuring that the trail and trail heads are clearly shown on Google/Apple Maps. It is also important that local businesses have a Google Business/Apple Maps listing and that details (i.e., opening hours) are correct in these business profiles.

3.4.2. Mobile devices used during the visit

Table 18. Visitors mobile device use during the visit

Current Visitors	Smartphone	Tablet	Laptop
Finding my way	52.9%	3.1%	8.8%
Finding information about the trail	48.1%	7.7%	15.9%
Sharing experiences on social media	46.4%	5.5%	7.5%
Finding out about events and activities	25.1%	4.4%	9.6%
Booking accommodation or transport	19.7%	3.4%	14.4%
Reading reviews of activities or restaurants	19.2%	4.6%	7.3%

Source: BVRT Visitor Survey

- Visitors used mobile devices to access digital content during their visit, from navigation to reading reviews of activities or finding information about the trail.
- The high proportion of mobile usage highlights the critical need for mobile phone connectivity. Some visitors commented that reception was not very good along the trail, limiting their use of electronic devices for navigation.
- The heavy reliance on smartphones suggests that visitors would like to have access to maps that are easy to download to mobile devices to help with planning and navigation. A sample survey respondent comment was, “*Current resources do not scale well on the mobile format.*”

3.4.3. Information needs

To identify information needs, current users were asked to describe any additional information they would have liked either before or during their stay. The major improvements to information services are summarised by the word cloud in Figure 2.

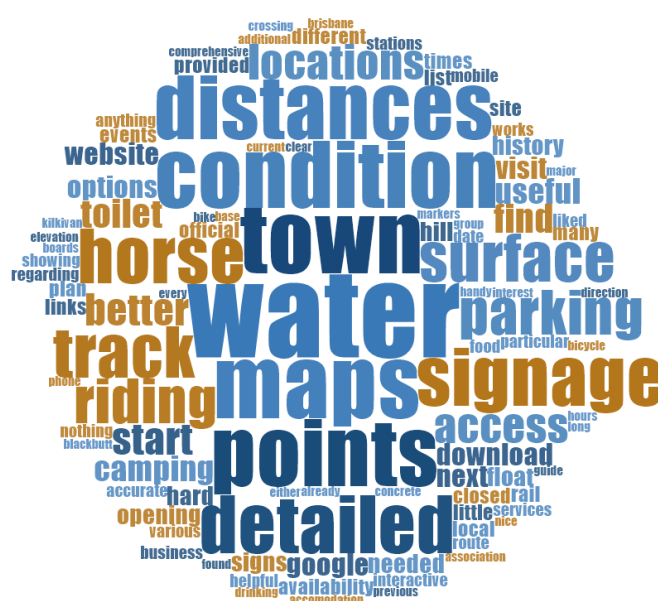


Figure 2. Information needs of visitors

Visitors were looking for interactive maps or an application that contains critical information, including:

- Trail surface conditions
- Magpie hotspots
- Section distance
- Locations of watering points and toilet facilities
- Points of interests (e.g., landmarks and stations)
- Business opening hours, including the markets
- Accommodation options
- Shuttle service drop-off and pick-up locations
- Parking locations for each trail section

3.5. Travel Motivations

3.5.1. Motivations for visiting the trail

Trail users were asked to rate how important various reasons were to their decision to visit the trail (1=Not at all important ... 5=Very important). They were then asked to rate how well they felt the BVRT performed (1=Very poor...5=Exceptional) against each item. Survey respondents were also able to select 'Not Sure' if they were not able to evaluate an item and these responses were excluded from the analysis.

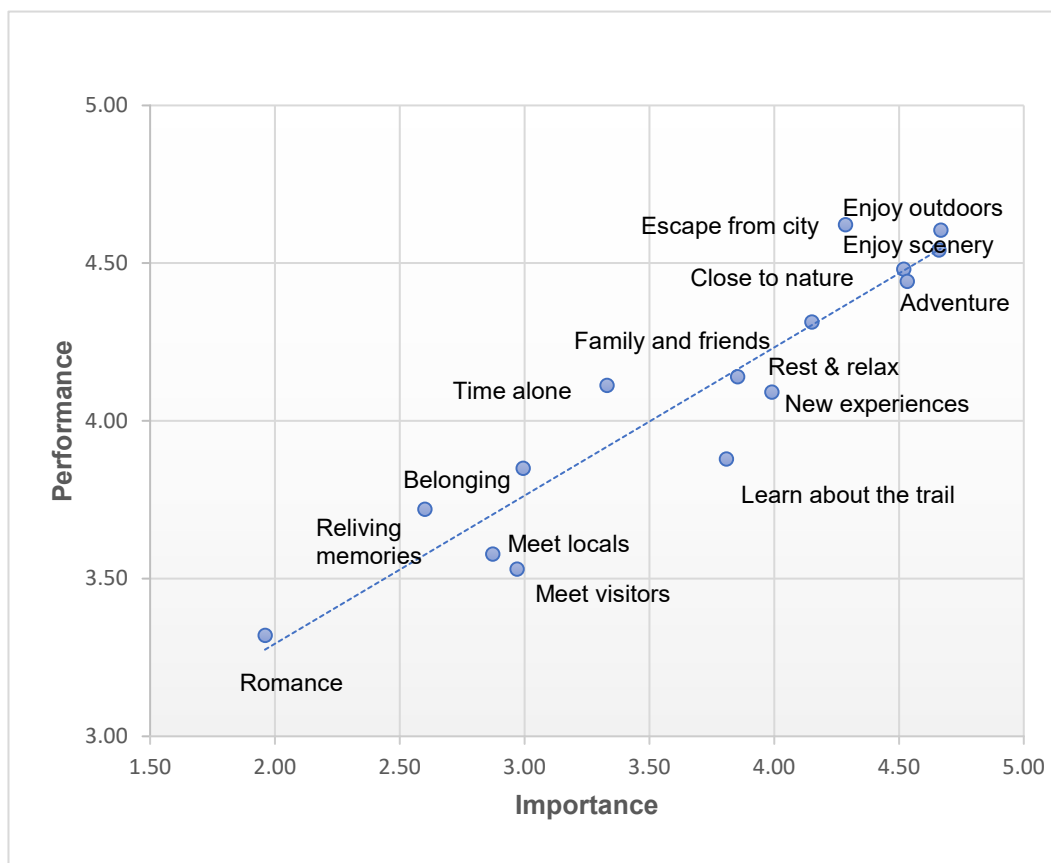


Figure 3. Importance-Performance analysis ('IPA') of visitor motives

The results identify motives that are important to the trail users as well as areas where needs may not be currently met. The resulting importance-performance analysis for the trail users is presented in Figure 3. Rather than presenting a traditional performance-importance grid, we suggest focussing on motives below the line, as these motivations were more important but trail users were less satisfied.

Figure 3 highlights the areas that are both important and well received. These include 'enjoying outdoors', 'enjoying scenery', and 'adventure' are the top three motives for visiting the trail, and that the trail performs well at providing experiences that appeal to these important needs. This is consistent with the vision of BVRT, which is to offer "a diverse range of outdoor adventures and challenges" (BVRT Strategic Plan, 2021).

The trail is also perceived as a place where visitors can connect with nature and rejuvenate from the stress of city life, and reconnect with family and friends.

The findings around these motives are also consistent with the comments of focus group participants who had visited the trail previously. A sample quote from a focus group: *"I guess the uniqueness is that it's actually quite a natural trail and the fact that you can experience the countryside."*

Learning about the trail, experiencing new things, and meeting other visitors or locals are moderately important motives for visitors but did not perform as well.

Visitors' overall experience can be further improved by focusing on activities designed to appeal to these below-the-line motives, as well as highlighting areas where the trail performs well.

3.6. Visitor Spending

Local and non-local visitors were asked to estimate how much they spent on various aspects of their trip per visit, including the expenditure on accommodation, food and drinks, transport, shopping, tours and gear³.

Table 19. User average spending per stay

	Average spend per visit		Total
	Non-local visitors	Local visitors	
Food and drinks	\$85.09	\$23.15	\$74.64
Retail Shopping	\$12.34	\$3.43	\$10.84
Fuel	\$28.33	\$4.80	\$24.23
Accommodation	\$165.47	\$26.76	\$161.81
Bike or hire gear	\$31.82	\$15.12	\$28.97
Pick up / drop off transfers	\$14.71	\$1.98	\$12.55
Tours	\$7.34	\$1.74	\$6.39
Getting to & from the trail	\$31.48	\$2.40	\$26.52

Source: BVRT Visitor Survey

³ Please note the estimated spending is per travel party.

- The results indicate that accommodation accounts for the highest expenditure, followed by food and drinks. Table 20
- Visitors' average spend on accommodation averages \$162 per visit, with a range from \$0 to \$1800.
- An analysis of specific spending items indicated that in addition to spending on food and drinks, and accommodation, visitors also spent on bike hire or repair.
- There may be an opportunity to increase yield by accommodating visitors spending needs on this item. This is also supported by visitors' comments, "*a few more bike repair options other than just Toogoolawah.*"
- Further insight can be gained by looking at the average **visitor spend per day** to account for differences in length of stay (see Table 20).

Table 20. Current visitors average spend per day by the length of stay

	Average spend per day	
	Day Trippers	Overnight Stays
Food and drinks	\$40.72	\$54.93
Retail Shopping	\$6.26	\$7.68
Fuel	\$18.56	\$13.62
Accommodation	N/A	\$58.84
Bike or hire gear	\$33.27	\$7.19
Pick up / drop off transfers	\$4.76	\$10.92
Tours	\$3.27	\$4.87
Getting to & from the trail	\$11.83	\$21.60
Total Spend	\$118.88	\$179.81

Source: BVRT Visitor Survey

- On average, overnight users spent around \$180 per night during their stay, while day trippers spent around \$120.
- The spend per visit for overnight visitors is consistent with National Visitor Survey (NSV) data for Queensland (\$178) (Tourism Research Australia, 2020).
- The spend per visit for day trippers is lower than NSV data for Queensland (\$136), highlighting that there may be an opportunity to increase yield.
- Overnight visitors are likely to spend more per day than day trippers in most spending categories.

Table 21. Visitors average spend per visit by family lifecycle

	Young Singles	Couples	Full Nester I	Full Nester II	Full Nester III	Empty Nester	Older Singles
Food and drinks	\$66.43	\$50.12	\$43.33	\$60.07	\$81.17	\$86.23	\$81.90
Retail Shopping	\$18.57	\$9.56	\$13.57	\$6.00	\$15.45	\$10.95	\$8.47
Fuel	\$24.67	\$14.96	\$21.07	\$14.59	\$27.29	\$42.77	\$33.50
Accommodation	\$16.93	\$29.07	\$28.67	\$47.98	\$76.19	\$120.21	\$82.00
Bike or hire gear	\$4.30	\$168.44	-	\$12.00	\$18.40	\$53.30	\$1.58
Pick up/drop off transfers	\$5.71	\$15.54	\$4.33	\$7.88	\$14.31	\$31.91	\$16.32
Tours	-	\$2.33	-	-	\$2.09	\$28.72	-
Getting to & from the trail	\$16.89	\$10.00	\$5.87	\$14.51	\$32.17	\$51.46	\$60.48
Total Spend	\$153.50	\$300.02	\$116.84	\$163.03	\$267.07	\$425.56	\$284.25

Source: BVRT Visitor Survey

- Visitor spending varies considerably based on family lifecycle stage. Older couples ('Empty Nesters') spend considerably more, followed by couples and families with school-aged children.

Table 22. Visitors average spend per visit by accommodation type (\$)

	Camping	Caravan Park	Cabin	Holiday rental	Motorhome/ Caravan	B&B	Hotel/Motel	Others
Food and drinks	94.36	153.39	436.00	616.67	101.43	300.88	285.12	208.16
Retail Shopping	123.48	156.52	209.50	216.67	141.43	226.47	193.90	205.79
Fuel	21.67	21.52	34.20	10.00	17.86	22.79	17.32	49.21
Accommodation	32.73	22.17	27.50	13.33	75.71	29.26	46.37	28.42
Bike or hire gear	0.91	1.30	15.50	0.00	0.00	11.18	40.37	68.42
Pick up/drop off transfers	18.33	38.26	46.00	0.00	45.71	58.24	51.59	19.74
Tours	1.21	1.74	0.00	0.00	0.00	1.18	25.61	0.00
Getting to & from the trail	74.24	112.61	73.00	10.00	38.57	119.03	63.10	61.21
Total Spending	366.94	507.52	841.70	866.67	420.71	769.03	723.37	640.95

Source: BVRT Visitor Survey

- An analysis of spend per stay by accommodation type indicates that spending was highest for users staying in holiday rentals, cabin, B&B, and hotels/motels.

3.7. The Visitor Experience

Evaluation of the visitor experience focussed on current visitors' perceptions of trail, facilities, accommodation, transport, food and dining, attractions, and activities.

3.7.1. Public amenity and facility: IPA analysis

The research team asked respondents to rate the importance of key trail attributes and then to assess how well the trail performed on each attribute. Figure 4 illustrates important attributes such as rail trail signage, access to drinking water, cleanliness as the top three attributes that would affect their decision to visit the rail.

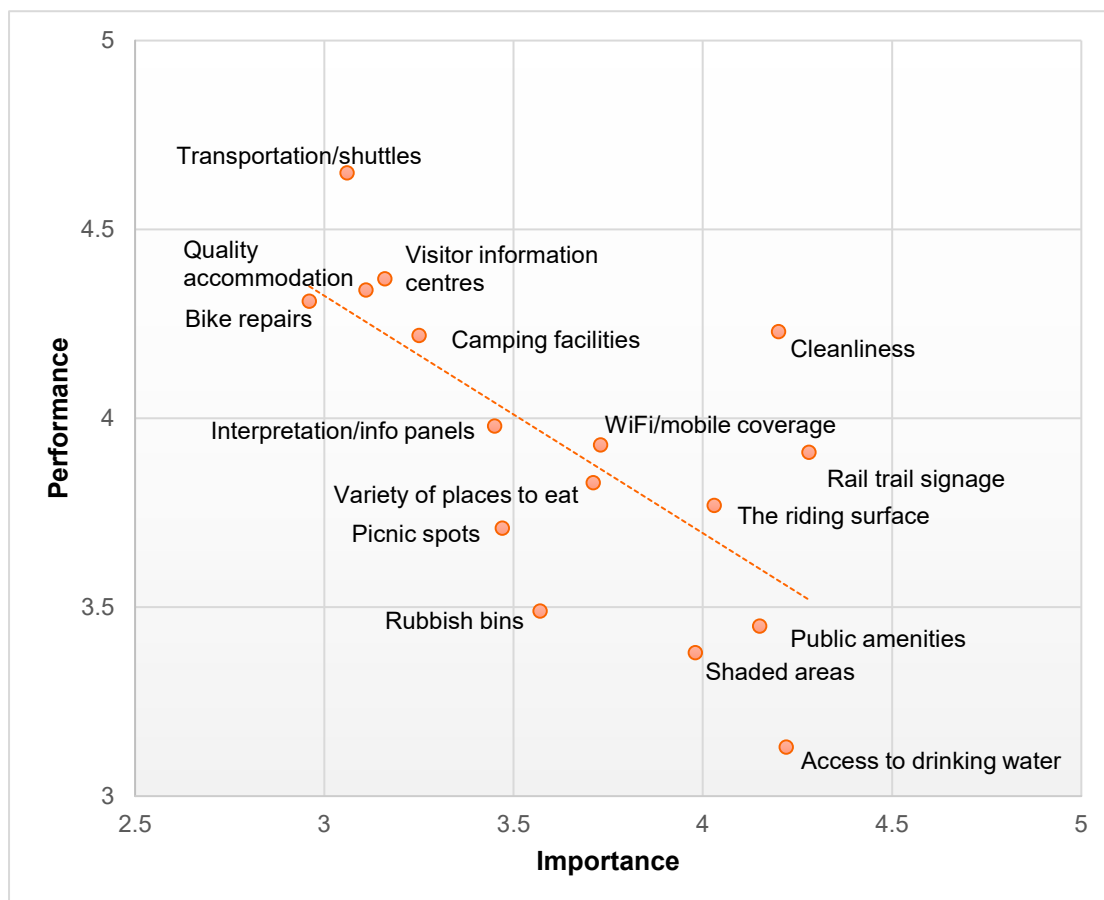


Figure 4. Importance-Performance analysis for facility

The trail performed well in some areas, including transportation or shuttles, visitor information centres, and bike repair facilities, however, these attributes were perceived with low importance by visitors.

Users identified access to drinking water, public amenities (e.g., toilet), rail trail signage, and the riding surface as important attributes that were under-performing.

3.7.3. Transport

The research team asked respondents to identify their primary means of transport for their most recent visit to the trail as well as their usage of shuttle services.

Table 23. Transport modes used

Getting to and from the trail	Non-locals		Locals	
	Frequency	Percent	Frequency	Percent
Private vehicle or motorcycle	238	55.7%	35	38.0%
Bicycle	114	26.7%	29	31.5%
Horse-riding	32	7.5%	5	5.4%
Walking	16	3.7%	16	17.4%
Train	9	2.1%	4	4.3%
Campervan	5	1.2%	1	1.1%
Bus	2	0.5%	1	1.1%
Rental vehicle	1	0.2%	1	1.1%
Other (please specify)	10	2.3%	-	0.0%

Source: BVRT Visitor Survey

Table 24. Shuttle bus services used

	Non-locals		Locals	
	Frequency	Percent	Frequency	Percent
Out There Cycling	82	91.1%	5	100%
Translink Service (Bus)	2	2.2%	-	-
Pursers Coaches	1	1.1%	-	-
Not specified	5	5.6%	-	-

Source: BVRT Visitor Survey

- The results indicate a heavy reliance on private vehicles to access the trail, imposing a strain on parking facilities, as well as safe parking for vehicles.
- The usage of public transport was very low.
- The usage of shuttle services was low, with only 95 surveyed visitors (18.3%) using the service, indicating a low awareness of the service. As one respondent commented in the areas for improvement, *"better marketing of shuttle service"*.
- The most widely used shuttle bus was "Out there Cycling" (91%).

3.7.4. Accommodation

The research team asked respondents to identify the accommodation they used on their last visit to the trail as well as their comments regarding the accommodation options available along with the trail.

Table 25. Accommodation preferences

	Frequency	Percent
Tent/Camping/glamping	27	17.1%
Caravan park	14	8.9%
Cabin	4	2.5%
Own property	1	0.6%
Holiday rental	3	1.9%
Motorhome/Caravan	7	4.4%
Apartment	2	1.3%
B&B/guest house	16	10.1%
VFR	3	1.9%
Hotel/motel	24	15.2%
Other	12	7.6%
Multiple accommodations used*	45	28.5%

Notes: *staying at multiple accommodations, the most common combinations are camping with caravan, and camping with B&B. Source: BVRT Visitor Survey

- Overall, accommodation was not heavily utilised by survey respondents.
- Tent, camping or glamping (17.1%) and hotel or motel (15.2%) were the most common styles of accommodation used by current visitors.
- 28.5% of users used multiple accommodation types during their visit.

Many comments were received on both surveys as well as the focus groups when participants were asked to provide suggestions for accommodation options available along the trail (N=241). The comments are presented as word cloud in Figure 6. Details on accommodation preferences for specific trail sections are summarised in Table 26.



Trail section	Affordable accommodation	Refined accommodation
Wulkuraka	<ul style="list-style-type: none">• NA	<ul style="list-style-type: none">• NA
Fernvale	<ul style="list-style-type: none">• NA	<ul style="list-style-type: none">• NA
Lowood	<ul style="list-style-type: none">• More camping options	<ul style="list-style-type: none">• NA
Coominya	<ul style="list-style-type: none">• More options	<ul style="list-style-type: none">• NA
Esk	<ul style="list-style-type: none">• Free camping options• Caravan park without 2-night minimum stay	<ul style="list-style-type: none">• More B&B options
Toogoolawah	<ul style="list-style-type: none">• More camping options	<ul style="list-style-type: none">• More B&B options• More hotel options
Harlin	<ul style="list-style-type: none">• NA	<ul style="list-style-type: none">• NA
Moore	<ul style="list-style-type: none">• NA	<ul style="list-style-type: none">• NA
Linville	<ul style="list-style-type: none">• Shower on camping site• Toilet (only single toilet at the camping site)• More huts	<ul style="list-style-type: none">• NA
Benarkin	<ul style="list-style-type: none">• NA	<ul style="list-style-type: none">• NA
Blackbutt	<ul style="list-style-type: none">• More options	<ul style="list-style-type: none">• NA
Yarraman	<ul style="list-style-type: none">• More options• Cabins: bigger bunk bed• More cabins	<ul style="list-style-type: none">• Yarraman Gardens Motel needs to upgrade

Current visitors had an overall positive experience with accommodation, particularly in terms of the affordability and country atmosphere of staying at showgrounds, as well as the enjoyable experience in the local pubs.

Twenty-nine comments specifically provided suggestions/feedback for affordable accommodation (e.g., camping and motel), 21 comments for refined accommodation (e.g., B&B, and hotels), and 14 generic comments for the availability of accommodation.

- **Camping** (17 comments): 35% were happy with their camping experience but would like to see **improvements in toilet and shower facilities** on some camping sites (e.g., Linville), while 65% would like to have more free camping options, particularly at Esk.
- **Motel** (12 comments): 67% were happy with their motel experience. However, 33% believed the quality of the motel was poor or too expensive for pensioners. A sample comment is,

“We did consider staying the first time, but accommodation options are poor to pretending. Just saying you have accommodation doesn’t mean it is! 1970’s style motels, pubs in poor condition, no hospitality.”
- **B&B** (5 comments): 80% would like to have more B&B options.
- **Hotel** (16 comments): 56% were happy with their stay at hotels, particularly at Linville Hotel and the Grand Hotel in Esk, while 25% raised issues on noise and bike storage. Sample comments include,

“The Grand Hotel in Esk - the owner was very accommodating for the bike riders. He locked all the bikes away for the evening in a secure container. He then got all the bikes out early the next morning. He did this willingly and with no fuss. Certainly made things so much easier and enjoyable.”

“The Linville Hotel under new owners who have a vision for business on the rail trail have made some great improvements recently. The hotel under the previous owners catered to the locals and barely tolerated trail users but the new owners actually embraces and welcomes trail users which makes the whole experience much better.”

3.7.5. Primary activity on the trail

Table 27. Primary activity on the trail

	Non-locals		Locals	
	Frequency	Percent	Frequency	Percent
Cycling or biking	338	79.2%	54	58.7%
Horse Riding	39	9.1%	16	17.4%
Walking	28	6.6%	7	7.6%
Trail Running	9	2.1%	6	6.5%
Hiking	6	1.4%	5	5.4%
Dog Walking	4	0.9%	2	2.2%
Exercise	2	0.5%	1	1.1%
Other*	1	0.2%	1	1.1%

Notes: *Geocaching, BVRTUA event, visiting Lowood native gardens. Source: BVRT Visitor Survey

- Not surprisingly, cycling or biking is the primary activity on the trail.
- The trail is also popular for horse riding and walking.

3.7.6. Trail section visited

The research team asked respondents to identify which section(s) of the trail they utilised on their most recent visit.

Table 28. Section of the trail utilised

	Frequency	Percent
Wulkuraka to Fernvale	198	38.2%
Lowood to Coominya	191	36.8%
Esk to Toogoolawah	174	33.5%
Harlin to Moore	158	30.4%
Linville to Benarkin	197	38.0%
Blackbutt to Yarraman	157	30.3%
Fernvale to Lowood	214	41.2%
Coominya to Esk	178	34.3%
Toogoolawah to Harlin	164	31.6%
Moore to Linville	169	32.6%
Benarkin to Blackbutt	182	35.1%

Source: BVRT Visitor Survey

- There was no significant difference in usage across the sections of the trail.
- The most frequently utilised section of the trail is Fernvale to Lowood (41.2%), followed by Wulkuraka to Fernvale (38.2%).
- The least frequently utilised sections are Blackbutt to Yarraman (30.3%), which is the final leg of the BVRT with some difficult creek crossings, and Harlin to Moore (30.4%), which is likely due to the trail difficulty with steep gradients.
- The utilisation of different sections can be enhanced by addressing safety concerns among less experienced riders regarding creek crossings.

3.7.7. Local markets and attractions visited

The research team asked respondents to identify which markets, major attractions in the regions, as well as the information centres they visited during their trip.

Table 29. Local market, major attractions, and information centres visited

Market attended during the trip	Total =96	Percent
Esk Markets	21	4.0%
Linville Hall Markets	5	1.0%
Fernvale Country Markets	33	6.4%
Moore Hall Markets	10	1.9%
Esk Garden and Lifestyle Fair	3	0.6%
Toogoolawah Railway Markets	7	1.3%
Fernvale Junction Feast and Trade Village	9	1.7%
Kilcoy Yowie Country Markets	6	1.2%
Toogoolawah Cattle Sales	2	0.4%
Others	52	10.0%
Major attractions visited during the trip	Total =373	Percent
Old Church Gallery Moore	67	12.8%
Logans Inlet	7	1.3%
Somerset Regional Art Gallery	16	3.1%
Lockyer Creek Bridge	117	22.4%
Lake Wivenhoe	52	10.0%
Lake Somerset	27	5.2%
Lowood Gardens	39	7.5%
Other*	48	9.2%
Information centre visited during the trip	Total =229	Percent
Esk User Information Centre	42	8.4%
Kilcoy User Information Centre	7	1.3%
Blackbutt User Information Centre	51	9.8%
Fernvale User Information Centre	72	13.8%
Toogoolawah User Information Centre	28	5.4%
Yarraman User Information Centre	29	5.6%

Notes: *Fernvale bakery, Linville Hotel, local cafes, the Rail Trail and the Tunnel.

Source: BVRT Visitor Survey

- Some respondents indicated that they visited during midweek not weekends, and the markets were not available.
- The results indicated relatively low participation in and low awareness of major markets.
- It is noted that some users were not aware that there are attractions along the trail.
- The most frequently visited attraction is Lockyer Creek Bridge, Fernvale bakery, or other local cafes.
- Further analysis of focus groups and visitors' comments on their ideal visit (Figure 7) indicated that visitors would like to stop at local cafes and local bakeries during the trip.
- The most frequently visited information centre is Fernvale Visitor Information centre (13.8%), followed by Blackbutt User Information Centre (9.8%).

3.8. Visitor sentiment

The visitor sentiment provides insights on current visitors' revisit intention, the Net Promoter Score measures visitors' satisfaction, visitors' likelihood to recommend the BVRT to others, and visitors' description of an ideal visit.

3.8.1. Visitor Net Promoter Score: Satisfaction

Visitors were asked whether they planned to return to the BVRT in the future (e.g., the next 12 months or the next 5 years).

Table 30. Current visitor intentions

	Day Trippers	Overnight Stays	Total
Would you visit Brisbane Valley Rail Trail again?	N=355	N=159	N=514
Yes, within the next 12 months	93.8%	77.4%	88.7%
Yes, within the next 5 years	2.0%	11.3%	4.9%
Yes, not sure when	3.1%	9.4%	5.1%
Not Sure	1.1%	1.9%	1.4%

Source: BVRT Visitor Survey

- The results indicated that BVRT has a very high rate of intention to return.
- Focus groups provided support to these results, with some participants indicating their strong emotional attachment to the trail.

To measure Net Promoter Score of the trail, Current trail users were asked "On a scale from 0 to 10, how satisfied are you with your rail trail experience?" to measure their Net Promoter Score ('NPS'). This measure provides an overall satisfaction with the trail.

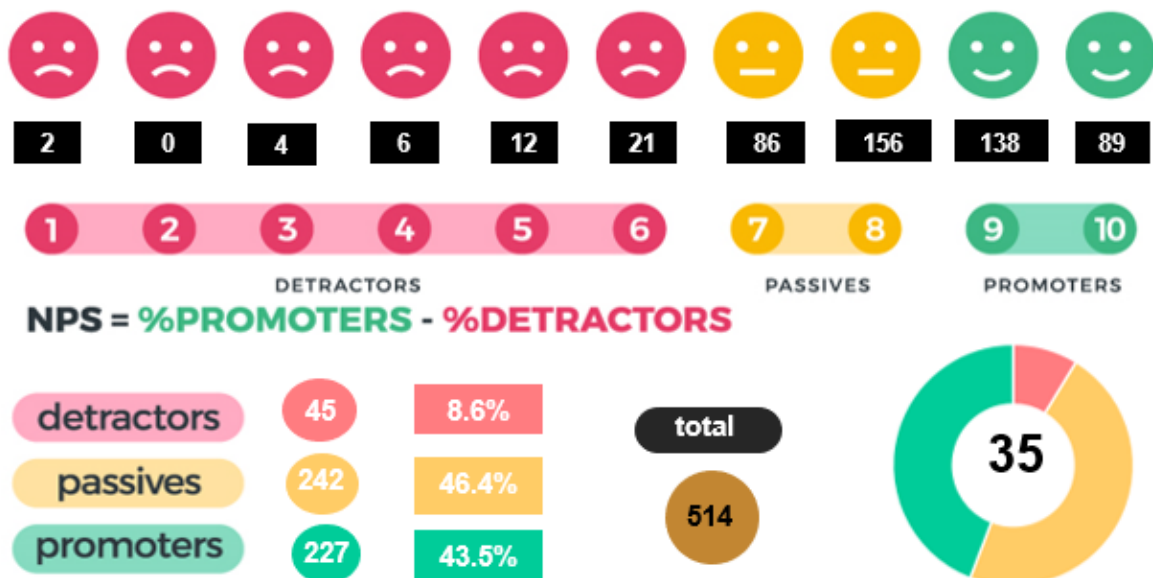


Figure 7. Visitors net promoter score of the trail - satisfaction

The NPS analysis indicated the overall satisfaction is good, but it is noted that 46.4% of visitors although "satisfied" are unenthusiastic who are more vulnerable to competitive offerings such as other leisure or fitness options.

Leveraging on Passives and addressing their concerns might turn them into promoters and enhance their visitation. The areas of visiting experience that can be improved are summarised in the word cloud (Figure 8) and should be given serious consideration.

3.8.2. Improving the Experience

The CSIRO's (2013) report on the future of tourism in Queensland highlights that authenticity, personalisation, and friendliness are important expectations among visitors. The findings presented in this section point to several opportunities to enhance specific aspects of the visitor experience on the trail.

To get a broader overview of the areas that most need to be improved, current visitors were asked to suggest things that could be improved as well as their ideal visit of the trail. The comments are presented as a word cloud in Figure 8 for areas of improvement. Table 31 provides a summary of the comments in the specific areas, while Table 32 provides details for each section of the trail.



Figure 8. Areas of visiting experience can be improved

Table 31. Visitors comments on areas of improvements

Total comments on areas of improvements	N=345	Percent
Trail Surface	93	27%
Toilet	24	7%
Parking	14	4%
Bridge	28	8%
Water fountains	75	22%
Signage	58	17%
Shade	34	10%
Magpie	16	5%
Food options	33	10%

Source: BVRT Visitor Survey

Table 32. Visitors comments on areas of improvements by sections of the trail

	Surface	Signage	Amenities	Food/shops
Wulkuraka to Fernvale			Secure parking Water supply at Wulkuraka	More offers for food and drink at Wulkuraka
Fernvale to Lowood		Signage alert for road crossing from Fernvale into Lowood		
Lowood to Coominya	Too rough for cyclists Too rocky for horse riders		More shade along the trail	
Coominya to Esk	Too rough for cyclists Too rocky for horse riders		Access to drinking water at Coominya	More offers for food and drink at Coominya
Esk to Toogoolawah	Too rough for cyclists Too rocky for horse riders	Signage showing alert of magpie	More shade along the trail	
Toogoolawah to Harlin	Too rough for cyclists Too rocky for horse riders	Signage showing alert of magpie	More shade along the trail	
Harlin to Moore		Extra directional signage Signage for creek crossings and steep hills	More shade along the trail	
Moore to Linville			More drinking water at Moore	
Blackbutt to Yarraman		Signage showing where the trail starts towards Yarraman signage showing from Yarraman station to town centre		

Source: BVRT Visitor Survey and focus group

From the analysis of focus groups and qualitative comments in the survey, current visitors provided a number of suggestions for improving the experience on the trail. As presented in the word cloud (Figure 7) and Table 31, these suggestions can be grouped under the following key areas:

Trail surface

- 27% would like to see improvement in trail surface, particularly better surface in Coominya-Esk section;
- It is noted that visitors would like to have a better surface, but not a concrete surface, 17 respondents who leave comments on trail survey stated “no more concrete”.
“You have built a fantastic attraction but are making a few major errors. - No more concrete. As far as I’m concerned, the rail trail only begins after the concrete ends. I spend many thousands per year on cycling tourism but I’m not spending any tourist dollars to ride a mountain bike on concrete.”

Public amenities

- Toilets: More toilets between towns to attract more walkers/hikers.
- Drinking water access:
 - Safe clean drinking water, not green water from a tank.
 - Easy access to drinking water both at major stops and between (e.g., Coominya)
 - The accessibility to water is crucial to attracting visitors seeking for hiking experience.

Shade structure preferences

- More native plantings along the barren sections: Fernvale to Coominya, and Moore to Toogoolawah.

Signage

- Signage showing where the trail starts for each section, particularly at Yarraman;
- More prominent warnings for less-experienced riders (e.g., when a difficult gully is ahead or the condition of the trail surface changes);
- Having the official TMR website on signs along the trail;
- More historical/interpretive signage along the trail;
- Signage along the trail indicating the distance to the water.

Visitor safety concerns

- Magpies:
 - More warnings of magpies for trail users in the breeding season.
 - Further analysis of visitors’ ideal visit to BVRT indicated that the magpies attack was one of their primary concerns for visiting the trail during spring.
“Would never come back in Spring.”
“I was constantly attacked for 2.5 days.”
“Magpies can spoil the whole trip for the newbie, especially children.”
- Crossings:
 - The road crossing from Fernvale getting into Lowood
 - Bridges across steep culverts
 - More bridges to even out gradients.
 - Some concrete creek crossings have dangerous corners
 - Crossing the D’Aguilar Hwy is dangerous.
 - Some of the gates are dangerous/impossible to open on a horse.

Food and dining quality and variety

- Many comments about limited trading hours, particularly on weekends.
- Better quality of food and more options for food and drink, particularly at Coominya.
"The quality of service - accommodation & food - seems to be lacking. This would be a possible deterrent to inviting overseas friends to do it with me."
- Better variety of eateries and cafes, such as meal options and healthy food options.
"It's mostly pies and bakeries."

Horse riders

- Mounting blocks near the gates.
- Horse stalls along the way are tiny.
- Easy access to water troughs for horses.

3.8.3. Visitor Net Promoter Score: Recommendation

Current trail users were asked the questions "On a scale from 0 to 10, how likely are you to recommend the Brisbane Valley Rail Trail to a friend or family member?" to measure their Net Promoter Score ('NPS'- recommendation). The results indicate a high level of user loyalty, NPS = 66. (Figure 9).

The focus groups and comments in the survey provided some insights for giving or not giving a recommendation of the trail to friends or relatives. The results are summarised in the word cloud (Figure 10).

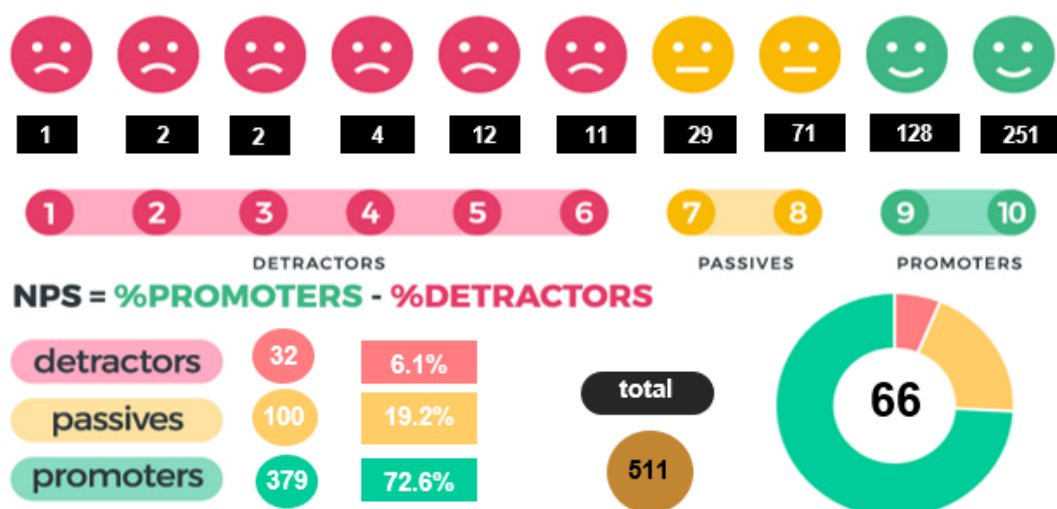


Figure 9. Visitor net promoter score – recommendation



Figure 10. Rationale of NPS-Recommendation

Users' rationale of **giving** a recommendation of the trail include,

- A great way to visit the little towns
- Great place to ride and experience nature with friends and family”
- Good ride for all levels
- Easy to access

Users' rationale of **not giving a** recommendation of the trail include,

- Poor trail surface
- Lack of signage
- Missing bridges
- Not friendly for hikers

4. Next steps

The primary goal of this project was to explore current visitor usage and experiences with the trail, and to identify areas for improving the visitor experience. This project and final report was designed as a starting point, to gain deeper insights into the BVRT and to identify ways to improve the experience and outcomes.

There are several important **next steps recommended** to further enhance the value of the trail and to facilitate co-created experiences with different user groups to maximise the economic benefits of the trail for all stakeholders. As a starting point, several potential areas for future research include:

1. Longitudinal (over time) studies designed to gain a more nuanced and causal understanding of motivators and experiences of key user segments.
2. Identification of market segments with significant growth opportunities to guide decisions about marketing and communication messages, and the design of new experiences.
3. A detailed economic impact assessment to understand benefits and economic opportunities for local communities.
4. A supply-side product audit of key attractions, resources, accommodation and visitor amenities that can serve as a basis for designing thematic packages and extended experiences.
5. Identification of ways to enhance the 'historical' elements of the trail using technologies and innovations to provide a richer and more authentic experience so that the trail can appeal to groups interested in more than the outdoor and fitness elements.

Appendix - Survey Questionnaire

Project Title: Brisbane Valley Rail Trail Visitor Research Program

Purpose of this study: This survey seeks your views about the Brisbane Valley Rail Trail and should take about **20 minutes** to complete, so grab a cuppa and settle in! The survey is funded by Somerset Regional Council and the Department of Transport and Main Roads. This project is being led by The University of Queensland's Service Innovation Alliance. Your answers will help to inform management decisions and improve the visitor experience of the trail.

Investigators: Prof Janet McColl-Kennedy, A/Prof David Solnet, A/Prof Pierre Benckendorff, Prof Brent Ritchie

Ethics Information: Your participation in this study is completely voluntary and you have the right to refuse to answer any questions asked. Also, you may withdraw your participation at any time you wish without any penalties. As a participant in this research, your acceptance is required as confirmation of your informed consent to participating in this study. By completing this form, you agree that you have read and understood the [Participant Information](#) for this study and agree to participate in this study. This study adheres to the guidelines of the ethical review process of The University of Queensland (#2020000412). You are free to discuss your participation in this study with the project manager, Miss Lara Klestov (contactable on l.klestov@uq.edu.au), but if you would like to speak to an officer of the University not involved in the study, you may contact the Ethics Officer on (07) 3365 3924.

Participant Consent:

Please click on each item below to indicate that you understand and agree to participate in this study.

- ☐ I confirm that I have read and understood the Participant Consent for this study.
- ☐ I understand that my participation is voluntary and I am free to withdraw at any time.
- ☐ I understand that my responses will be shared with Somerset Regional Council and the Department of Transport and Main Roads in a de-identified form.
- ☐ I agree to participate in this study.

Have you used the Brisbane Valley Rail Trail over the last 12 months?

Yes

No

What **information sources** did you use to plan your trip **before** and **during** your visit to *the Brisbane Valley Rail Trail*? (Select all that apply)

	BEFORE	DURING
Department of Transport and Main Road website (www.tmr.qld.gov.au/bvrt)	<input type="checkbox"/>	<input type="checkbox"/>
Brisbane Valley Rail Trail website (www.brisbanevalleyrailtrail.com.au)	<input type="checkbox"/>	<input type="checkbox"/>
Experience Somerset website (www.experiencesomerset.com.au)	<input type="checkbox"/>	<input type="checkbox"/>
Google or Google Maps	<input type="checkbox"/>	<input type="checkbox"/>
Social media (e.g. Facebook, Instagram)	<input type="checkbox"/>	<input type="checkbox"/>
Travel blogs, forums or review sites (e.g. TripAdvisor)	<input type="checkbox"/>	<input type="checkbox"/>
	BEFORE	DURING
Online videos (e.g. YouTube)	<input type="checkbox"/>	<input type="checkbox"/>
Visitor information centre	<input type="checkbox"/>	<input type="checkbox"/>
Motoring club (e.g. RACQ, NRMA)	<input type="checkbox"/>	<input type="checkbox"/>
Newspapers or magazines	<input type="checkbox"/>	<input type="checkbox"/>
Television or radio	<input type="checkbox"/>	<input type="checkbox"/>
Brochures or visitor guides	<input type="checkbox"/>	<input type="checkbox"/>
	BEFORE	DURING
Billboards or signage	<input type="checkbox"/>	<input type="checkbox"/>
Family or friends	<input type="checkbox"/>	<input type="checkbox"/>
Local businesses or residents	<input type="checkbox"/>	<input type="checkbox"/>
Other <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>

What **additional information** would you have liked **before** or **during** your visit?

Did you use any of the **devices** listed below for the following tasks **during** your visit to the *Brisbane Valley Rail Trail*? (Select all that apply)

	MOBILE	TABLET	LAPTOP
Finding information about the trail	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Finding out about events and activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Booking accommodation or transport	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reading reviews of activities or restaurants	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Finding my way (i.e. maps and navigation)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

MOBILE

TABLET

LAPTOP

Sharing experiences on social media (e.g. Facebook, Instagram, etc.)

☐
☐
☐

The following is a list of **reasons** why people might visit the *Brisbane Valley Rail Trail*.

- On the **left**, we would like you to think about how **important** each item is to your decision to visit (1=Not at all important ... 5=Very important)
- On the **right** we would like you to indicate how well you think the Brisbane Valley Rail Trail **performs** on each item (1=Very poor...5=Exceptional)

How important is each item to your decision to visit the trail? 1 = Not at all Important 5 = Very important						How well do you think the trail performs on each item? 1 = Very Poor 5 = Exceptional					
1	2	3	4	5		1	2	3	4	5	Not Sure
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	A good place to be with family or friends	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Escaping from city life	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Somewhere to rest and relax	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Meeting local people	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Experiencing new things	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Enjoying the scenery	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Being close to nature	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Going on an adventure	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1	2	3	4	5		1	2	3	4	5	Not Sure
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Feeling that I belong	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Having a romantic holiday	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Reliving memories from past trips	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Enjoying the outdoors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Learning about the trail	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Meeting other visitors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Spending time on my own	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1	2	3	4	5		1	2	3	4	5	Not Sure

Do you have any further comments to add?

What was the **primary reason** for visiting the trail on your last trip? (Select one only)

☐ Holiday/leisure

☐ Meeting up with a Social Club / Group

- | | |
|-----------------------------------------------------|------------------------------------------------------------------------|
| <input type="radio"/> Attending an event | <input type="radio"/> Education or school/university group or research |
| <input type="radio"/> Visiting friends or relatives | <input type="radio"/> Other |
| | <input type="text"/> |

Have you used the *Brisbane Valley Rail Trail* before?

- ☐ No, first time
☐ Yes, once before
☐ Yes, 2 to 5 times
☐ More than 5 times

What year did you first use the Trail?

How often do you use the trail?

- ☐ Daily
☐ Weekly
☐ Monthly
☐ Every 2-3 months
☐ Every 4-6 months
☐ Once a year

Which months do you normally visit?

- | | | |
|-----------------------------------|---------------------------------|------------------------------------|
| <input type="checkbox"/> January | <input type="checkbox"/> May | <input type="checkbox"/> September |
| <input type="checkbox"/> February | <input type="checkbox"/> June | <input type="checkbox"/> October |
| <input type="checkbox"/> March | <input type="checkbox"/> July | <input type="checkbox"/> November |
| <input type="checkbox"/> April | <input type="checkbox"/> August | <input type="checkbox"/> December |

For the following questions, we would like you to think about your most recent visit to the trail.

For your most recent visit, how much time did you spend on the trail?

- | | |
|----------------------------------------|----------------------------------------------|
| <input type="radio"/> One or two hours | <input type="radio"/> Two days |
| <input type="radio"/> Half day | <input type="radio"/> Three days |
| <input type="radio"/> A full day | <input type="radio"/> Other (please specify) |
| | <input type="text"/> |

What is the **primary activity** on your most recent visit?

- | | |
|-----------------------------------------|----------------------------------------------|
| <input type="radio"/> Cycling or biking | <input type="radio"/> Horse Riding |
| <input type="radio"/> Walking | <input type="radio"/> Dog Walking |
| <input type="radio"/> Trail Running | <input type="radio"/> Exercise |
| <input type="radio"/> Hiking | <input type="radio"/> Other (please specify) |
| | <input type="text"/> |

Which of the following section/s of the trail did you utilise on your most recent visit? (Select all that apply)

- | | |
|------------------------------------------------|------------------------------------------------|
| <input type="checkbox"/> Wulkuraka to Fernvale | <input type="checkbox"/> Fernvale to Lowood |
| <input type="checkbox"/> Lowood to Coominya | <input type="checkbox"/> Coominya to Esk |
| <input type="checkbox"/> Esk to Toogoolawah | <input type="checkbox"/> Toogoolawah to Harlin |
| <input type="checkbox"/> Harlin to Moore | <input type="checkbox"/> Moore to Linville |
| <input type="checkbox"/> Linville to Benarkin | <input type="checkbox"/> Benarkin to Blackbutt |
| <input type="checkbox"/> Blackbutt to Yarraman | |

What was your primary means of transport for your most recent visit to the *Brisbane Valley Rail Trail*?

- | | |
|-----------------------------------------------------|----------------------------------------------|
| <input type="radio"/> Private vehicle or motorcycle | <input type="radio"/> Campervan |
| <input type="radio"/> Rental vehicle | <input type="radio"/> Walking |
| <input type="radio"/> Bicycle | <input type="radio"/> Horseriding |
| <input type="radio"/> Train | <input type="radio"/> Other (please specify) |
| <input type="radio"/> Bus | <input type="text"/> |

Where did you enter (start) the trail?

Did you use a shuttle service whilst on the trail?

- | | |
|---------------------------|--------------------------|
| <input type="radio"/> Yes | <input type="radio"/> No |
|---------------------------|--------------------------|

What shuttle service did you use?

- | | |
|-----------------------------------------|-------------------------------------------------|
| <input type="radio"/> Out There Cycling | <input type="radio"/> Translink Service (Train) |
|-----------------------------------------|-------------------------------------------------|

☐ Pursers Coaches

☐ Translink Service (Bus)

Why did you not choose to use a shuttle service?

Did you stay at any accommodation on your visit?

☐ Yes

☐ No

How many **nights** did you stay?

What **accommodation** did you use on your last visit to the Brisbane Valley Rail Trail? (Select all that apply)

☐ Tent, camping or glamping

☐ Caravan park

☐ Cabin

☐ Own property

☐ Holiday rental

☐ Motorhome / Caravan

☐ Apartment

☐ Bed & breakfast or guest house

☐ Visiting friends or relatives

☐ Other

Do you have any comments regarding the accommodation options available along the trail?

For your entire stay, please estimate in **Australian dollars** how much you **spent** on each of the following items. If zero, please enter '0'.

Food and drinks

Retail Shopping

Fuel

Accommodation

Bike or hire gear

Pick up / drop off transfers

Tours

Getting to & from the trail

Did you attend any of the following **markets** during your trip? Tick all that apply.

- | | |
|--------------------------------------------------------|--------------------------------------------------------------------|
| <input type="checkbox"/> Esk Markets | <input type="checkbox"/> Toogoolawah Railway Markets |
| <input type="checkbox"/> Linville Hall Markets | <input type="checkbox"/> Fernvale Junction Feast and Trade Village |
| <input type="checkbox"/> Fernvale Country Markets | <input type="checkbox"/> Kilcoy Yowie Country Markets |
| <input type="checkbox"/> Moore Hall Markets | <input type="checkbox"/> Toogoolawah Cattle Sales |
| <input type="checkbox"/> Esk Garden and Lifestyle Fair | <input type="checkbox"/> Other - please specify |
| | <input type="text"/> |

Which of the following **major attractions in the region** did you visit on this trip? (Tick all that apply)

- | | |
|-------------------------------------------------------------------------|-------------------------------------------------|
| <input type="checkbox"/> Old Church Gallery Moore | <input type="checkbox"/> Lake Wivenhoe |
| <input type="checkbox"/> Logans Inlet | <input type="checkbox"/> Lake Somerset |
| <input type="checkbox"/> Somerset Regional Art Gallery (The Condensery) | <input type="checkbox"/> Lowood Gardens |
| <input type="checkbox"/> Lockyer Creek Bridge | <input type="checkbox"/> Other - please specify |
| | <input type="text"/> |

Did you visit any of the following **visitor information centres** during your trip? (Tick all that apply)

- | | |
|---------------------------------------------------------------|-----------------------------------------------------------------|
| <input type="checkbox"/> Esk Visitor Information Centre | <input type="checkbox"/> Fernvale Visitor Information Centre |
| <input type="checkbox"/> Kilcoy Visitor Information Centre | <input type="checkbox"/> Toogoolawah Visitor Information Centre |
| <input type="checkbox"/> Blackbutt Visitor Information Centre | <input type="checkbox"/> Yarraman Visitor Information Centre |

Next, we would like you to rate each of the destination **facilities** below in terms of how **important** they are to you and how well you think the *Brisbane Valley Rail Trail* **performs** on each item.

How important is each item to your decision to visit the trail? 1 = Not at all Important 5 = Very important						How well do you think the trail performs on each item? 1 = Very Poor 5 = Exceptional					
1	2	3	4	5		1	2	3	4	5	Not Sure
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Visitor information centres	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Cleanliness	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Bike repairs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Access to drinking water	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Rubbish bins	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Picnic spots	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Transportation/shuttles	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Public amenities (e.g. toilets)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1	2	3	4	5		1	2	3	4	5	Not Sure
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Rail trail signage	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Shaded areas	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Interpretation/information panels	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Quality accommodation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Camping facilities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	The riding surface	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Variety of places to eat	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	WiFi / mobile phone coverage	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1	2	3	4	5		1	2	3	4	5	Not Sure

Do you have any further comments to add?

On a scale of 0 (Not at all satisfied) to 10 (Extremely satisfied), how **satisfied** are you with your rail trail experience?

Not at all satisfied
0 ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10 ☐ Extremely satisfied

What aspects of your *Brisbane Valley Rail Trail* experience could be **improved**?

On a scale of 0 (Not at all likely) to 10 (Extremely likely), how likely are you to **recommend** the *Brisbane Valley Rail Trail* to a friend or family member?

Not at all likely
0 ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10 ☐ Extremely likely

Can you tell us **why** you gave that score?

Describe your **ideal visit** to the *Brisbane Valley Rail Trail*.

Is there anything else you would like to share with us about your experience on the *Brisbane Valley Rail Trail*?

ALMOST THERE! Just a few more questions about you...

What is your gender?

- ☐ Female
- ☐ Male
- ☐ Prefer not to say

In what year were you born?

Where do you usually live?

- ☐ Australia. Please provide your postcode:
- ☐ Overseas. Please tell us which country:

How many people travelled with you on your last visit?

Would you visit Brisbane Valley Rail Trail again?

- ☐ Yes, within the next 12 months
- ☐ Yes, within the next 5 years
- ☐ Yes, not sure when
- ☐ Not Sure
- ☐ No

What is the employment status of the main income earner in your household?

- ☐ Unemployed
- ☐ Studying
- ☐ Working part-time
- ☐ Working full-time
- ☐ Retired
- ☐ Prefer not to say
- ☐ Other

What is the current combined income of everyone in your household before tax (in Australian dollars)?

- ☐ Less than \$50,000
- ☐ \$50,001 to \$80,000
- ☐ \$80,001 to \$110,000
- ☐ \$110,001 to \$140,000
- ☐ \$140,001 to \$170,000
- ☐ \$170,001 to \$200,000
- ☐ Above \$200,000
- ☐ Prefer not to say

Do you have children either living in or outside of your household?

- ☐ Yes
- ☐ No

Which of the following age groups do your children fall into? (Select all that apply)

- ☐ Under 5 years
- ☐ 5 to 14 years
- ☐ 15 to 17 years
- ☐ 18+ years

Which of the following best describes your household?

- ☐ Living with my parents or boarding
- ☐ Living alone
- ☐ Living in a shared adult house
- ☐ Living with my partner
- ☐ Living with my partner and children
- ☐ Living with my children

Which of the following best describes the group you travelled with on your recent visit to the trail?

- ☐ I was visiting alone
- ☐ I was visiting with my children
- ☐ I was visiting with my partner
- ☐ I was visiting with my partner and children
- ☐ I was visiting with my extended family
- ☐ I was visiting with a group of friends
- ☐ I was with a school/university group
- ☐ I was with an organised tour or group
- ☐ I am visiting with a club/society
- ☐ Other:

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