

Bike tourism opportunities  
in Queensland

Supplementary report:

# Trail Riding



Supplemental to *Bike Tourism in  
Queensland — Research Report*



Queensland  
Government

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## Key bike tourism opportunities

Bike tourism – or bike riding on leisure trips – is a popular activity enjoyed by many, and can be a powerful reason to choose to visit a destination. Bike riding also delivers a more positive in-destination experience for visitors, leading to repeat visitation and recommendations to family and friends.

There are many types of bike riding, however there are four key opportunities for Queensland:

 <p><b>Trail riding</b></p>	<p>Riding a dedicated path or trail through a scenic location. The surface – paved, dirt, gravel – doesn't matter, as long as it is separated from traffic. Includes single day and multi-day rides.</p> <p><i>Example: Brisbane Valley Rail Trail</i></p> <p>588,000 adults went trail riding while on a trip in the last 12 months.</p>
 <p><b>Mountain biking</b></p>	<p>Riding bikes on single off-road tracks, usually graded green (easiest) through to double black (extreme).</p> <p><i>Example: Nerang National Park Trails</i></p> <p>177,000 adults went mountain biking while on a trip in the last 12 months.</p>
 <p><b>Holiday riding</b></p>	<p>Casual bike riding experiences, usually done spontaneously. Holiday riding is an activity done in a destination.</p> <p><i>Example: Riding along the Cairns Esplanade</i></p> <p>1.2 million adults went holiday riding while on a trip in the last 12 months.</p>
 <p><b>Road cycling</b></p>	<p>Riding road bikes on the road.</p> <p><i>Example: The Gap to Mount Glorious (via Mt Nebo)</i></p> <p>323,000 adults went road cycling while on a trip in the last 12 months.</p>

*Note: Individuals can participate in multiple types of riding.*

This report supplements *Bike Tourism in Queensland – Research Report*. It provides detailed data about the trail riding market, traveller motivations and behaviours.






## Trail riding

- Trail riding experiences have broad appeal and large participation numbers. The low barrier to entry (ability to ride a bike) makes them appealing to many.
- Single day trail rides are impacting where people travel – there is strong enough appeal that travellers are choosing destinations to do these rides. Single day rides also impact future visitation through likelihood to recommend and likelihood to return to a destination.
- Multi-day trail rides are also driving destination choice and likelihood to recommend, however these appeal to fewer people than single day rides.
- Rail trails are a common trail riding experience, however the opportunity is much broader – any path or trail through a scenic location could deliver to the same consumer needs.
- While the bike riding is important, it is just one component of a much broader experience.
- Ideal trail riding experiences must be scenic, offer complementary experiences, incorporate food and beverages, and variety. Within these elements, there's no magic formula for what makes a special trail riding experience – it depends on the destination itself.
- Experiences that incorporate all elements of the broader experience will increase motivation to travel, however the threshold required to attract visitors from shorter distances is lower.

# What is the market?

## Single day trail riding

 Biked on a trip (# adults)	563,000
 Overnight visitor expenditure	\$760 million

 Queensland market	Number of trips	Overnight visitor expenditure
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### Single day trail riders

Queenslanders in Queensland	122,000	\$54 million
Queenslanders travelling interstate	66,000	\$86 million
Interstate visitors to Queensland	92,000	\$120 million

#### AVERAGE SPEND PER PERSON PER NIGHT

Single day: \$76 intrastate \$194 interstate

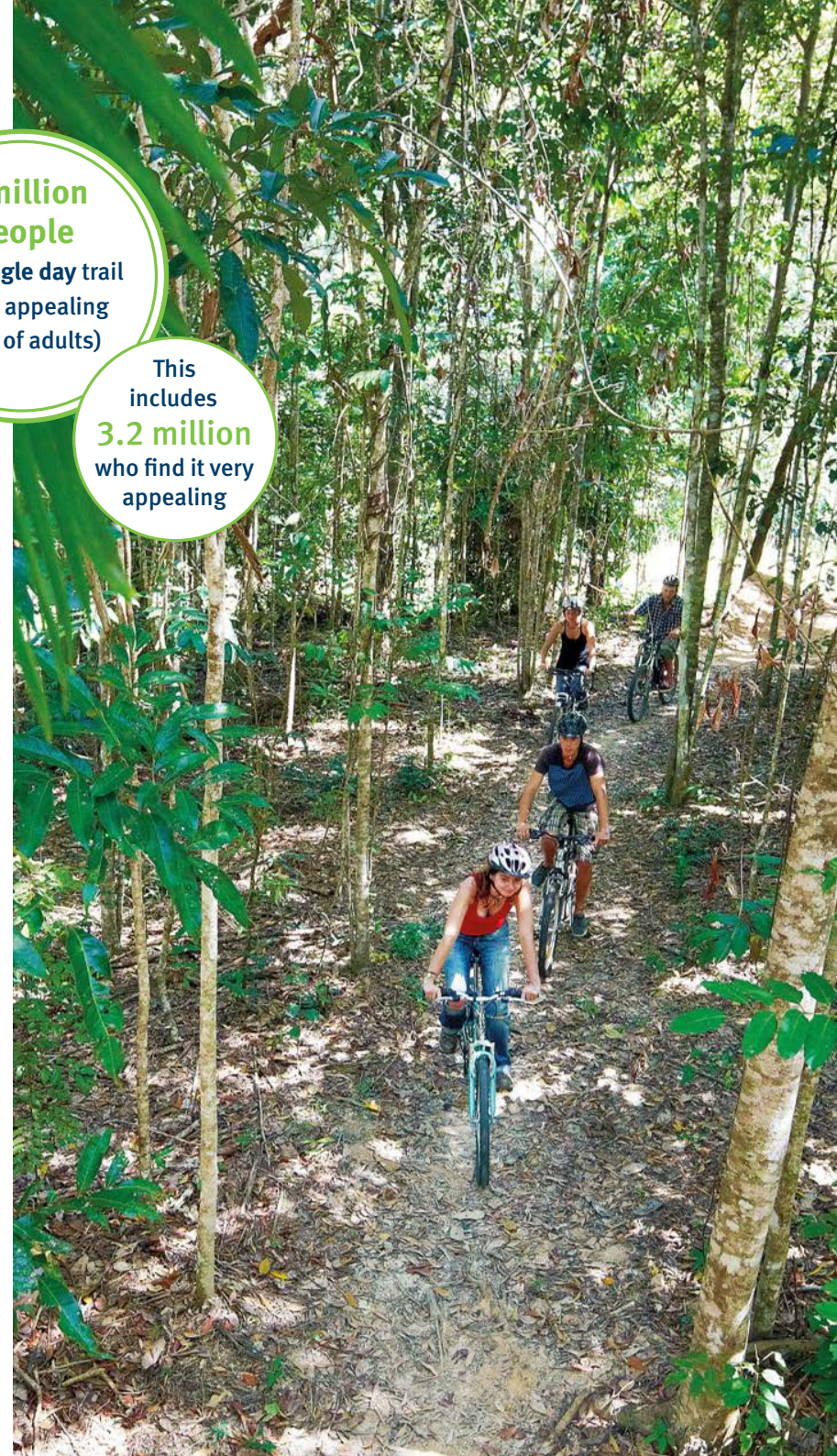
### Single day trail riding

	 Day trips (50+km)	Overnight trips		
		 Intrastate	 Interstate	 Overseas
Participation (% of population)	1.9%	1.5%	1.2%	1.5%
Participation (# people)	282,000	228,000	184,000	217,000
Average # of trips	1.7	1.1	0.7	0.9
Total # of trips	929,000	638,000	368,000	496,000
Average spend	n/a	\$440	\$1,304	n/a

9 million people



find single day trail riding appealing (61% of adults)


This includes 3.2 million who find it very appealing



# What is the market?

## Multi-day trail riding

 <b>Bike on a trip (# adults)</b>	<b>96,000</b>
 <b>Overnight visitor expenditure</b>	<b>\$375 million</b>

 Queensland market	Number of trips	Overnight visitor expenditure
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### Multi-day trail riders

Queenslanders in Queensland	27,000	\$19 million
Queenslanders travelling interstate	24,000	\$40 million
Interstate visitors to Queensland	40,000	\$65 million

#### AVERAGE SPEND PER PERSON PER NIGHT

Multi-day: \$73 intrastate \$110 interstate

### Multi-day trail riding

	Overnight trips		
	 Intrastate	 Interstate	 Overseas
Participation (% of population)	0.4%	0.3%	0.1%
Participation (# people)	67,000	54,000	25,000
Average # of trips	1.8	1.6	0.5
Total # of trips	172,000	152,000	47,000
Average spend	\$719	\$1,656	n/a

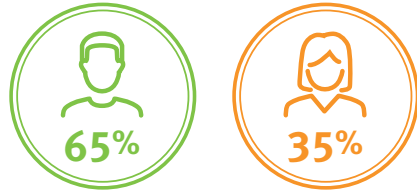
**5.4 million people** find multi-day trail riding appealing (36% of adults)

This includes **1.6 million** who find it very appealing



# Who is the market?

## Profile of trail riders



Frequency of riding bikes	Bike ride
More than once a week	29%
Once a week	19%
A few times a month	20%
About once a month	11%
Once every two to three months	9%
Less often	12%

Age	Total
18 to 24 years	13%
25 to 29 years	18%
30 to 34 years	13%
35 to 39 years	12%
40 to 44 years	5%
45 to 49 years	6%
50 to 54 years	10%
55 to 59 years	7%
60 to 64 years	6%
65 to 69 years	6%
70+ years	3%

Household structure	Total
Living alone	12%
A couple with children at home	38%
A couple without children at home	36%
Single with children at home	3%
Shared household of adults	3%
A shared household of family	7%
Other	1%

**Trail riders** represent a broad cross-section of ages, incomes and household structures, further emphasising the broad appeal of these experiences.



# Understanding the market

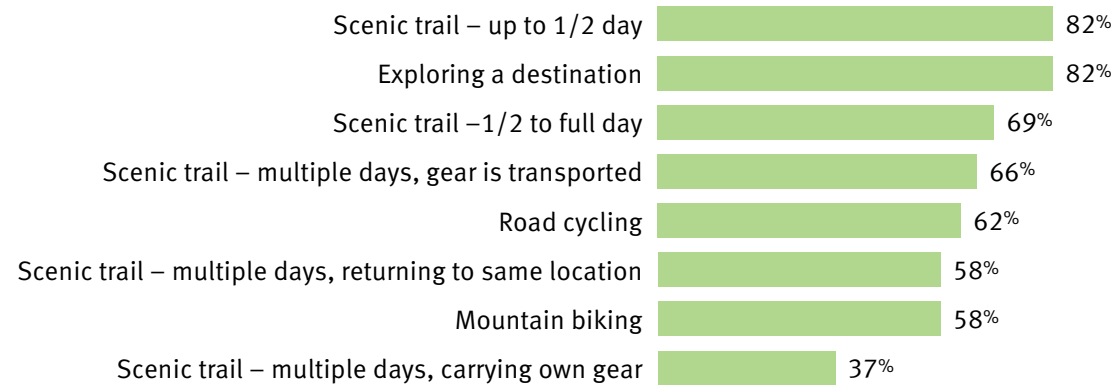
Household income	Total	Household income	Total
Under \$49,999	9%	\$110,000 - \$119,999	5%
\$50,000 - \$59,999	3%	\$120,000 - \$129,999	5%
\$60,000 - \$69,999	3%	\$130,000 - \$139,999	5%
\$70,000 - \$79,999	7%	\$140,000 - \$149,999	9%
\$80,000 - \$89,999	7%	\$150,000 - \$199,999	14%
\$90,000 - \$99,999	8%	\$200,000 - \$249,999	10%
\$100,000 - \$109,999	5%	\$250,000+	10%

39% are High Value Travellers\* 

## Appeal of different types of riding

(among those who have been trail riding)

■ Find it appealing



Note: If percentages do not add up to 100% it is due to rounding, not missing responses.

\* High Value Travellers engage in domestic leisure (holiday or visiting friends and relatives) travel, spend more than average on leisure trips, and are interested in the type of leisure experiences Queensland has to offer.



# Where do they travel?

## Destination of last trip

	Single day trail riding		Multi-day trail riding	
	Intrastate	Interstate	Intrastate	Interstate
<b>Queensland</b>	19%	25%	37%	26%
<b>New South Wales</b>	41%	17%	32%	9%
<b>Victoria</b>	40%	32%	32%	30%
<b>South Australia</b>	-	3%	-	21%
<b>Western Australia</b>	-	16%	-	1%
<b>Northern Territory</b>	-	0%	-	0%
<b>Tasmania</b>	-	3%	-	14%
<b>Canberra and ACT</b>	-	4%	-	-




Relative to population, Queensland is capturing a smaller share of intrastate single day trail riding, but capturing a larger share of multi-day trail riding. The completion of the Brisbane Valley Rail Trail in 2018 was a contributing factor to this. Victoria – with its investment in rail trails – is the strongest performing state.

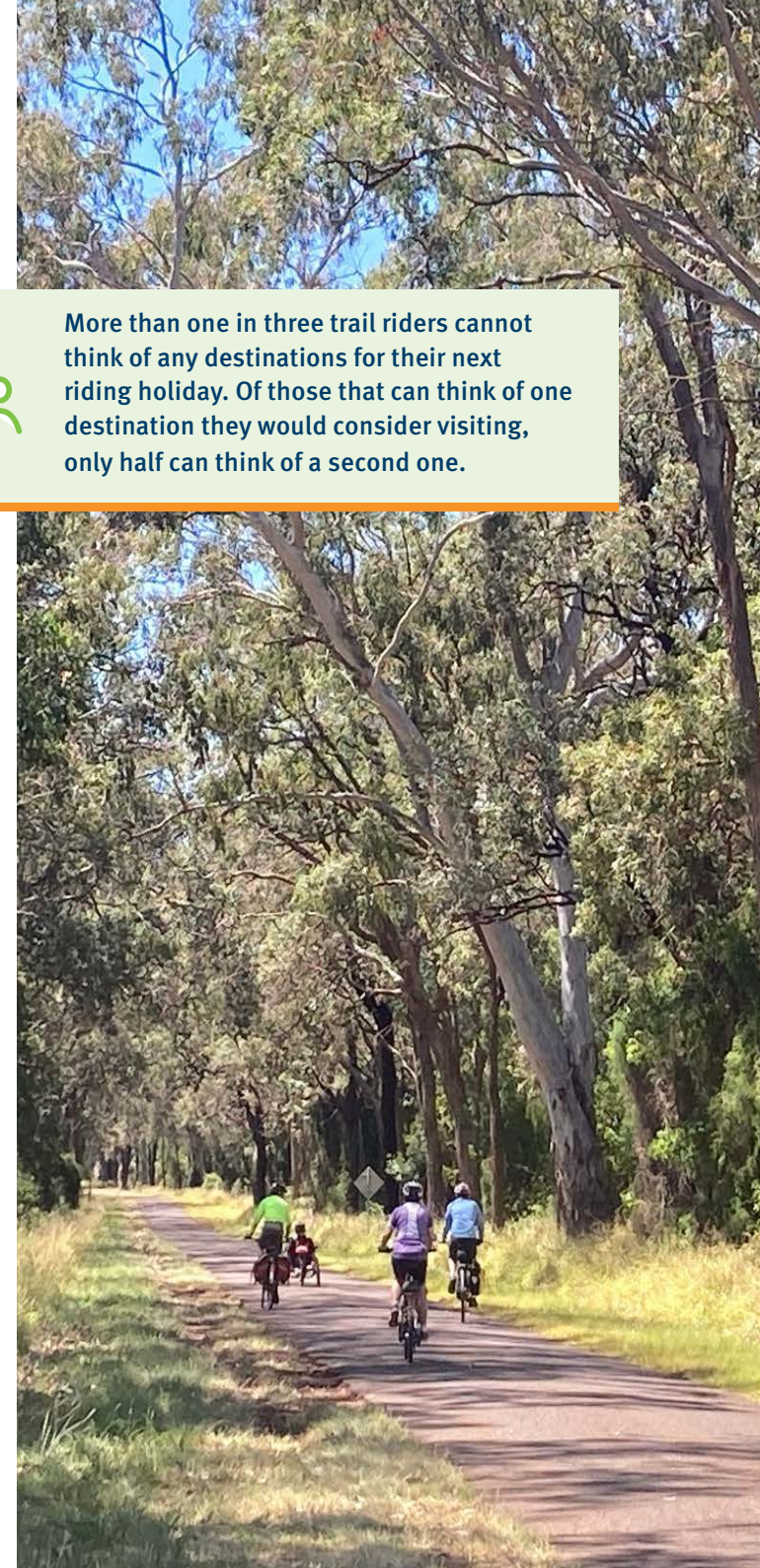
## How they choose where to travel

There is generally low awareness of trails, and no universal bucket list of ‘must ride’ trails. This is a direct result of the casual engagement most have with trail riding. Most trail riders have found out about a specific ride they find appealing and they want ride it. They are not actively shopping for ‘riding holidays’, some may have never done an experience like this. For these reasons:

- when promoting shorter riding experiences, it needs to be done as part of the overall destination experience
- when developing and promoting longer trail riding experiences, there is a need to focus on individual trails as destinations themselves.



More than one in three trail riders cannot think of any destinations for their next riding holiday. Of those that can think of one destination they would consider visiting, only half can think of a second one.





# How do they travel?

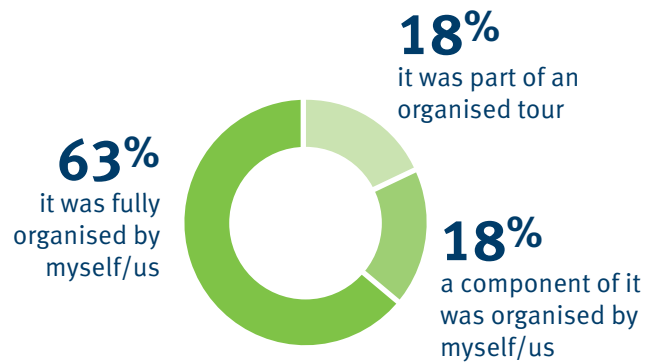
Total number of nights away on trip	Total
Day trip only	26%
1 night	13%
2 nights	21%
3 nights	14%
4 nights	6%
5 nights	5%
6 nights	1%
7 to 13 nights	6%
14 nights or more	7%

Total number of days biking	Total
1 day	52%
2 days	23%
3 days	11%
4 days	8%
5 days	2%
6 days	1%
7 to 13 days	3%
14 days or more	1%

Mode of transport	Total
Fly	37%
Drive	54%
Other	9%

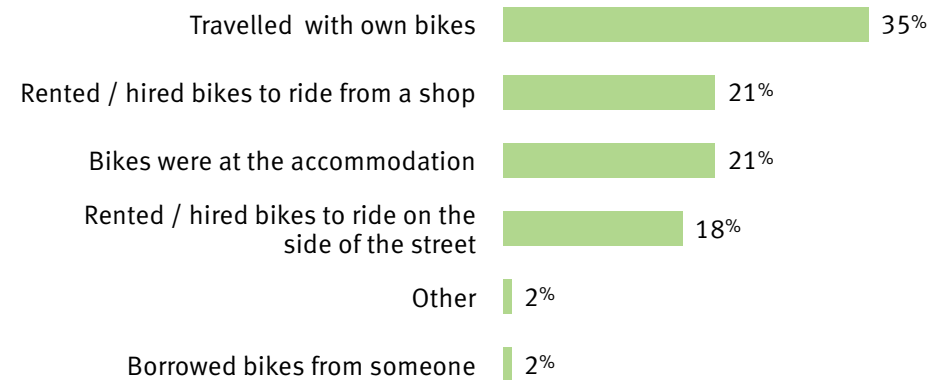
Travel party	Total
Solo trip	16%
Partner / spouse	53%
Children under 18	16%
Children over 18	4%
Other family	3%
Friends	30%
Colleagues	2%
Other	0%

## Trip planning and organisation



Note: If percentages do not add up to 100% it is due to rounding, not missing responses.

## Bike source



# What makes a successful destination?

## An ideal destination will tick *all the boxes*

Ideal trail riding experiences that offer all of the following elements will be more successful at motivating travellers.

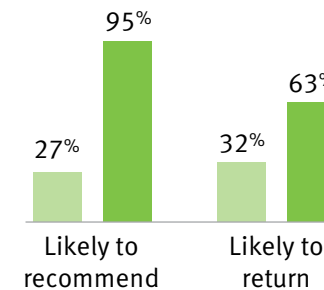
<b>Scenery</b>	<b>Biking PLUS supporting experiences</b>
<ul style="list-style-type: none"> <li>■ Landscapes</li> <li>■ Nature</li> <li>■ Wildlife</li> <li>■ City experiences with views can also work</li> </ul>	<ul style="list-style-type: none"> <li>■ Things to do (swimming, walks, picking fruit)</li> <li>■ Things to stop and see along the way (points of interest, landmarks)</li> <li>■ History, cultural, education, art, kids activities</li> </ul>
<b>Food and beverage</b>	<b>Variety</b>
<ul style="list-style-type: none"> <li>■ Important enough it deserves its own category</li> <li>■ Cafes, bakeries, restaurants, farm fresh</li> <li>■ Wine, beer and other drinks</li> </ul>	<ul style="list-style-type: none"> <li>■ Across all the scenery, experiences and food and beverage</li> <li>■ Becomes more important the longer the trail</li> <li>■ There is a real fear of monotony and boredom</li> </ul>

Within these features, there's no magic formula for what makes a special trail riding experience – it depends on the opportunities of the specific destination. Ultimately, they should be authentic to the destination. The threshold required to attract visitors from shorter distances is lower.

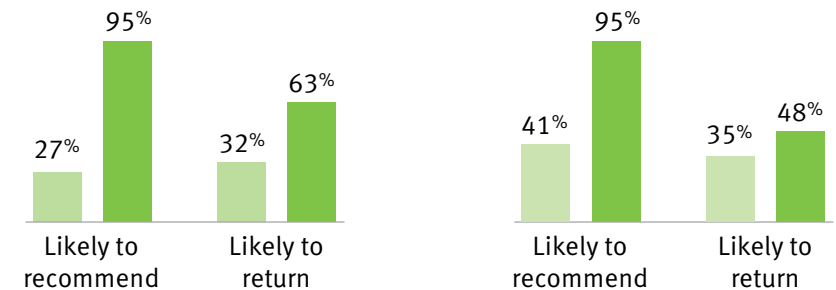
## Impact of good vs. great experiences



### Single day trips



### Multi-day trips



■ Satisfied with trail riding experience  
■ Very satisfied with trail riding experience



**Remember: the bike riding is just one component of the overall experience.**

