

2006 User Survey of the Great Allegheny Passage for the
Allegheny Trail Alliance

Peter M. Boxx
Rebecca Robertson

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OBJECTIVE

In the summer of 2006, The Progress Fund conducted a survey of trail users along the Great Allegheny Passage (GAP). As the GAP has recently been completed, local businesses, Trail Towns, private groups, and government agencies are requesting information about trail users to better plan for future developments along the trail. In order to ensure that appropriate development occurs along the trail, data must be collected to identify who it is that is using the trail. Data has been previously collected to identify how users are spending money, but full character profiles have never been conducted. The aim of this survey is to identify who is using the trail and what their motivations are for spending time and money in and around the trail and Trail Towns.

While information such as age group, gender, and zip code of trail users has been documented, it is important to continue to keep all data up-to-date. There are several categories that have been excluded from previous surveys that help define the characteristics of trail users. Of these categories, the most notable are income levels and other interests trail users have. This data would be extremely helpful in determining what kind of businesses should be encouraged along the trail. Also, when attempting to define the characteristics of trail users, it becomes important to recognize users' motivations for visiting the GAP and Trail Towns.

The ultimate goal is to attract people to the trail and have them spend time and money in the local communities along the GAP. Without knowing or having the proper data on trail users' characteristics, the task of growing the GAP as a tourist destination is more difficult. Attracting visitors to Trail Towns will lead to structural improvements and increased revenues for the communities.

The results of this survey will be used by two principle groups. The first group consists of local people, business owners and potential business owners along the trail. The second group is made up of local, state, and federal government agencies, foundations, and private developmental institutions. These groups will use the data collected by the survey to better plan for the future and understand the individuals who are using the trail and accommodate to their needs. The goal of these groups is to spur economic development and tourism. This data will help these groups take the appropriate steps toward achieving their goals and bringing the vision of the trail and its positive impact to full fruition.

EXECUTIVE SUMMARY

This study reports the use and habits of trail users of the Great Allegheny Passage bike/hike rail-trail during the summer of 2006. The study ran from August 9th to September 27th. In total, 266 surveys were completed at eight different locations along "the trail" between West Newton, PA and Frostburg, MD. The surveys were given to random users and were completed on-site. Most of the surveys were given out at trail head parking lots and trail access areas, but some were completed on the trail at the Big Savage Tunnel.

The user survey asked for information on trail use, party size, lodging, spending habits, missing services along the trail, outdoor activities, age, household income, and education level.

The majority of the trail users surveyed stated that they had used the Great Allegheny Passage before the visit in which they were asked. Most users cited that if they used the trail before that,

they were on the trail to bike. Following biking, hiking, walking, and water activities were the most popular activities the trail was being used for. Users surveyed were allowed to select more than one response, and many did.

When asked what the primary motivation for using the trail on the visit in which they were surveyed, most selected that exercise and health was the reason for their visit. Other reasons for using the trail were to experience the outdoors, spend time with friends and family and to relax.

The survey asked how frequently people use the trail. The majority of the respondents used the trail more than 11 times during the year. This was followed by respondents using the trail only 1-2 times per year, while one-quarter stated that they used the trail between 3-10 times per year. The majority of trail users also stated that they participate in outdoor activities frequently.

The survey collected information on the age and gender of surveyed trail users and the age of the members of their party. Sixty percent of those who took the survey were male. Most users were over the age of 30. The vast majority of trail users were between the ages of 30 and 65. Almost half of the users who took the survey were in the 51-65 age range.

The most popular sections along the trail are from Ohiopyle-Confluence, then Ohiopyle-Connellsville. There was a near- even split between users who had previously used the C&O Canal Towpath and those who had not.

Only a quarter of the users indicated that they had made an overnight trip on the trail. However, many stated that they would consider an overnight stay. Of the users who had made overnight visits, over half had stayed at camp sites, and many had stayed at either a motel or hotel, or at a bed and breakfast.

The survey asked trail users to designate the two most important factors in making an overnight visit on the trail. The respondents stated that distance along the trail between lodging locations was the most important, and services available in the trail towns was second most important.

The survey also collected information on trail users' willingness to spend money on a trail visit. A trail visit can be a day trip for a couple of hours or a multi-day trip. The majority of the users said they would be willing to spend \$76-\$150 on a given trip. Half of the users indicated that they would be willing to spend more money if specific services had been available. So the survey also asked what services and businesses the trail users wished were available. Three-quarters of the respondents wished there were restaurants or cafés along the trail, and half wanted bikes sales or repair shops. Grocery stores, local arts and crafts, and train service rounded out the top five responses.

The trail users were also asked what outdoor activities they have participated in over the past two years. The overwhelming majority of respondents stated that they had biked in the last two years. Biking was followed by hiking, picnicking, camping, canoeing or kayaking, mountain biking, fishing and cross country skiing.

The survey also collected information about the yearly household income level of the trail users. The largest income group of trail users was \$50,001-\$100,000. A quarter of trail users reported that they had household incomes of over \$100,000 annually.

Finally, the survey asked the highest level of education obtained by the trail user. All respondents had completed high school, and many had done at least some undergraduate studies. The largest proportion of trail users stated that they held a college degree, and there was also a good representation of users who had completed at least some post-graduate levels of studies.

METHODS

The survey was conducted from August 9 through September 27, 2006. The survey was administered to trail users at specific locations along the trail and was completed by users on site and returned. In order to entice trail users to complete the survey, administrators were instructed to give trail users Trail Book 2006. The administrators were to choose trail users at random and ask them to complete the survey.

The survey was administered at seven different locations along the Great Allegheny Passage. These locations were the train station in Meyersdale, PA, the visitors' center at Ohiopyle State Park, the visitors' center in Rockwood, PA, the trail-head parking lot in West Newton, PA, the parking lot at Cedar Creek Park, the Big Savage Tunnel, and the trailhead parking lot in Frostburg, MD. All the surveys were administered by Peter Boxx except those done at Ohiopyle, Rockwood and some in Meyersdale. The survey was conducted by the staff of the visitors' center at Ohiopyle, by Maynard Sembower in Rockwood and by the staff of the train station in Meyersdale.

The survey was to be completed on site due to the timing of the survey at the end of the summer season. The survey was designed to be conducted equally on weekdays and weekends. This was in accordance with the total trail usage determined by the trail counters that showed that weekday and weekend traffic was very similar. Of the 266 surveys completed 133 were completed on a weekday and 119 were completed on the weekend. Ten surveys were done on September 4, 2006, Labor Day Monday and four surveys were undated.

RESULTS

A total of 266 people responded to the survey. Of the 266 surveys, 18 were completed at Frostburg, 19 at Big Savage Tunnel, 42 at Meyersdale, 29 at Rockwood, 119 at Ohiopyle, and 39 at West Newton/Cedar Creek.

Demographic information.

In order to gain a better understanding of who is using the GAP, the survey asked participants to answer demographic questions. Trail users were asked questions addressing where they live, their age, gender, and income and education level.

First of all, we were interested in knowing where the trail users come from and how far they are willing to travel to use the trail. To address this question, the survey asked participants for their home zip code. The distance traveled by each user was determined by computing the distance between the zip code of the trailhead where the survey was completed and the home zip code provided by the respondent using MapQuest.com. The average distance trail-users traveled to each survey location is shown in Table 1.1. The percentage of trail users who were residents of Pennsylvania was also determined by the users' home zip codes.

The average distance traveled by users to access the trail varied from 79 miles at Frostburg to 221 miles at Rockwood. Average distance traveled at West Newton was 80 miles, 98 at Big Savage Tunnel, 133 at Meyersdale, and 154 at Ohiopyle. There were 3 outliers in the data: one respondent at West Newton had traveled 2,212 miles from Nevada, at Rockwood, one respondent had traveled 2,625 miles from Washington state, and at Meyersdale, one respondent had traveled 1,035 miles from Florida.

The percentage those surveyed who were Pennsylvania residents also varied greatly by survey location. At Frostburg, 59% of the people surveyed were PA residents. Seventy-nine percent of users at Big Savage Tunnel were from PA, as were 70% at Meyersdale, 61% at Rockwood, 62% at Ohiopyle and 97% at West Newton.

The survey participants were all adults over the age of 18. Sixty-two percent of total number of respondents were male, 33% were female, and 5% did not respond to the gender question. When all members of the participants' parties were accounted for, the highest percentage of users fell into the 51 to 65 age group (38%). This was followed by 32% in the 30 to 50 range, and 10% in both the 66 to 75 and under 13 age groups. Four and a half percent were in the 13 to 18 group, 4% were 19 to 29, and less than 1% of trail users were 75 or older.

The education level of respondents was asked. One quarter (26%) of all participants were college graduates, 20% held a master's degree, 18% were high school graduates, and 16.5% had some undergraduate education. Nine percent held a doctorate degree, and 7% had completed some graduate studies. The no response rate was 2.5%. See Table 1.2 for results.

The survey asked for the yearly household income level of the participants as well (see Table 1.3). The majority (36.5%) of households had an income of \$50,000 to \$100,000 per year. Twenty percent reported a household income of \$25,000 to \$50,000, 17% had an income of \$100,000 to \$150,000, and 6% were in the \$25,000 or under bracket. Four and a half percent reported a household income of \$150,000 to \$200,000, and 2.5% had an income of over \$200,000 per year. As this was a very personal question, many respondents were reluctant to answer it; this question had one of the highest no response rates of all the survey questions at 13.5%.

Trail usage and outdoor activities.

We also wanted to look at how often trail users visit the GAP and what types of activities they engage in while visiting the trail. Where are people going most often on the trail? What do they come to the GAP to do? Do people take short or long trips to the GAP? Do people do overnight trips? Where do they stay over night if they do? Survey participants were asked about their trail usage history, about that day's outing, and about the type and frequency of the outdoor activities that they typically participate in.

When asked about their general outdoor activity, most (83%) of people surveyed said that they participate frequently in outdoor activities. Fourteen percent said that they occasionally participate in outdoor activities, and less than 1% answered that they rarely or never participate in outdoor activities. Overall, within the past 2 years, 95% had biked, 77.5% had hiked, 59% had picnicked, and 53% had gone camping. Other outdoor activities that participants often engaged in within the past 2 years were: canoeing/kayaking (39% of those surveyed), mountain biking and fishing (both at 29%), cross-country skiing (25%), running/jogging (23%), golfing (21%), rafting (18.5%), birding (18%), downhill skiing (16.5%), and hunting (16%). Within the

past 2 years, 9% of people had gone caving, 9% had gone rock climbing, and 4.5% had done some other type of outdoor activity. See Table 2.1 for results.

The survey asked the primary motivations for today's visit to the GAP and how long the respondent expected to be on the trail that day. Over one half (50.75%) of the participants said exercise/health was the primary motivation for being on the trail today. Other popular responses included experiencing the outdoors (38%), spending time with family/friends (32%), relaxation (26%), and nature observation (9.5%). It should be noted on this question that the survey asked the respondent to select only one of the nine options given, however many users selected more than one option. See Table 2.2 for results.

Other motivations for trail use include 10.5% of users who were on the trail as thru-bikers, 3% who were on the trail to take photographs, 1% who were participating in a club activity, and 3% who stated that they were on the trail for some other reason. Fifty percent of the users expected to be on the trail for 3-5 hours that day, 25% expected to be on the trail for 1-2 hours, 18% for 6-10 hours, 4% for more than 10 hours, and 3% for less than an hour.

People were also asked for information about their trail use history. The survey asked whether they had ever visited the GAP before today, and if so, which activities they had participated in while on the GAP. In addition, participants were asked how many times per year they use the trail. Eighty-three percent of those surveyed had previously been to the GAP. Thirty percent of those who had been on the trail before said they use it more than 11 times per year, 12% use it 6 to 10 times per year, 14% use it 3 to 5 times per year, 27% use it 1 or 2 times a year, and 11% use the GAP fewer than once a year. Of the 83% who had previously visited the GAP, 82% had biked on the GAP before, 35% had walked, 34% had hiked, 20% had done water activities, 17% had done photography, and 15.5% had observed nature. Other activities that participants had done on the trail included fishing (6%), backpacking (2.5%), and horseback riding (1.5%). The no response rate for this question was 12.5%.

The survey asked participants whether they had ever done an overnight bike trip on the GAP. If so, in what type of accommodations had they stayed? If not, would they consider doing an overnight trip? Twenty-six percent of respondents had done an overnight bike trip on the GAP. Of that 26%, 56% had stayed at a camp site before, 40% had stayed at a motel/hotel, and 33% had stayed at a Bed & Breakfast. Of the people who had never done an overnight trip, 22% said that they would consider an overnight stay.

Another issue that the survey addressed was which sections of the trail people were using most often. The largest group of trail users on the GAP was in the Ohiopyle region. Most (77.5%) of the people surveyed had used the Ohiopyle to Confluence section of the trail, and 62.5% had used the Ohiopyle to Connellsville section. Most people had been to the town of Ohiopyle (83%), and many had been to Connellsville and Confluence as well (56% and 72%, respectively).

Of the sections of the GAP north of Ohiopyle, 39.5% of those surveyed had used the Connellsville to Dawson section, 45% had traveled on the Dawson to West Newton section, 40.5% had been on the West Newton to Boston section, and 32% used the Boston to McKeesport section. Travelling south from Ohiopyle, 46% percent of those surveyed had been on the trail from Confluence to Rockwood, and 43% had used the section from Rockwood to Meyersdale. Thirty-six and a half percent had been on the Meyersdale to Frostburg section, and 13% had been

on the Frostburg to Woodcock Hollow section. The C & O Canal Towpath connects to the GAP at Cumberland, MD and travels south to Washington, D.C. About half (48%) of the people surveyed had biked some part of the C & O Canal in the past. Five percent of users weren't sure which sections of the GAP they had been on. See Table 2.3 for results.

Spending habits and lodging preferences.

Finally, now that we know who is using the trail, and where and why they are using it, we would like to know *what people are willing to spend their money on while they are visiting*. What kind of amenities are they using? How much are they willing to spend? What kind of services would the trail user like to see more of? How do these things factor in for the user when they take a trip to the GAP?

When asked what factors were most important when making an overnight biking trip, users responded that distance along the trail between lodging locations (45.5%) and the services available in trail towns (36.5%) were the most important. Twenty-seven percent said that lodging amenities was one of the two most important things, and 13% said proximity to other available services. The no response rate for this question was 25%.

The survey asked participants how much money they would be willing to spend on a visit to the trail. The largest response was between \$76 and \$150 (33.5%). Twenty-five percent said that they would be willing to spend \$26 - \$75 and 17% said \$151 - \$250. Seven percent would not be willing to spend over \$25, 5% would be willing to spend \$251 - \$400, and 7% would be willing to spend over \$400 on a trail visit. When asked if they would have been willing to spend more money on services had they been available, 45% of the respondents said yes, 12% said no, and 36.5% didn't know.

Participants were also asked what services and businesses they wished were available along the trail. Three quarters (75.5%) of users said that they wish restaurants/cafes were available, 50% wished bike sales/repair shops were available, 41% said grocery stores, 21% said local arts and crafts, 18% said taverns/bars, 18% said train service, 12% said gift shops, and 9% would like to see galleries/antiques available in the Trail Towns along the trail.

One of the main purposes of the survey was to find out if trail users were interested in making overnight trips and lodging along the trail. The survey asked if there was strategically placed lodging along the trail, how inclined would the trail-user be to use it? This was measured on a scale of one to seven, with one being "not likely at all" to use it, and seven being "very likely." The results of the survey show that most people would be likely to use strategically placed lodging along the trail. Nearly 70% of those surveyed indicated that they would be more likely to use strategically placed lodging than less likely. And of those surveyed, 23.3% responded with the highest value, while only 6.4% responded that they had no interest in lodging. These results show that there is significant interest in overnight visits and lodging related to trail visits.

To understand further the nature of trail-users' interest in lodging along the trail, the survey asks what type of lodging would be the most appealing. To do this, the survey offers eight different types of lodging and asks the trail-user to rate their interest in each type on a scale of one to seven. Again, one indicated "least interested," and seven indicated "most interested." The eight types of lodging featured on the survey are Motel, Resort, Hotel, Country Inn/Lodge, Cabins/cottages, Bed & Breakfast, Primitive Camping, and RV Camping. The lodging types were judged by using a weighted score to determine which were the most desirable.

The weighted score was calculated by multiplying the score given to each type of lodging by the trail-user by the number of responses per score. Then these products were added together and divided by the number of responses per lodging type. The weighted score was taken twice, once excluding the No Responses and then including No Responses as values of one.

Of the eight types of lodging, Cabins/cottages produced the highest weighted score of 4.74 indicating that it would be the most desirable lodging accommodations for trail users. Following very close behind Cabins/cottages was Bed & Breakfasts with a weighted score of 4.66. It should be noted that Bed & Breakfasts did receive the most responses of the highest value of seven. RV Camping produced the lowest weighted score of 2.56. When the No Responses were added into the weighted score as values of one, Bed & Breakfasts scored the highest with 3.845, inching out Cabins/cottages by .002 points. The difference between the two results is that more people chose to rate Bed & Breakfasts than Cabins/cottages.

CONCLUSION

The Progress Fund's GAP User Survey for 2006 shows us that there is a market for economic expansion through tourist activities in the Trail Towns along the Great Allegheny Passage. By providing character profiles of who is using the trail and what their spending habits are, local businesses, private groups and government agencies alike can begin the process of identifying sustainable development opportunities that cater specifically these rail-trail users.

This group of rail-trail users can potentially bring more tourist money to the region if we are able to develop more of the services and amenities that they are motivated to spend money on. The survey has shown us that a significant number of users would like to spend more time and money to use certain services on the GAP if given the opportunity to do so. Many users have also indicated that they would consider taking an overnight trip to the GAP. So it is up to us to encourage the development of specific, user-directed business opportunities such as restaurants and cafes, bed & breakfasts, crafts shops, and bars/taverns, among others.

Previous studies such have shown us that hundreds of thousands of people access the GAP each year. From our study, we also know that the vast majority of the users indicated that they participate in outdoor activities on a regular basis, and many participate in outdoor sports such as hiking, biking, rafting, canoeing, kayaking, and cross-country skiing. Since we already have the client base coming to our Trail Towns, if we provide them with more outdoor activity-related services such as bike shops and kayak rentals, it is likely that they would spend more of their time and money to participate in these outdoor activities on the GAP instead of taking their business elsewhere to do so.

The positive impact of healthy, sustainable economic development and tourism in the Trail Towns can be enormous if governments, private groups, businesses, and citizens encourage their communities to support a trail user-friendly atmosphere and services.

Table 1.1
Average Miles Traveled to Trailhead

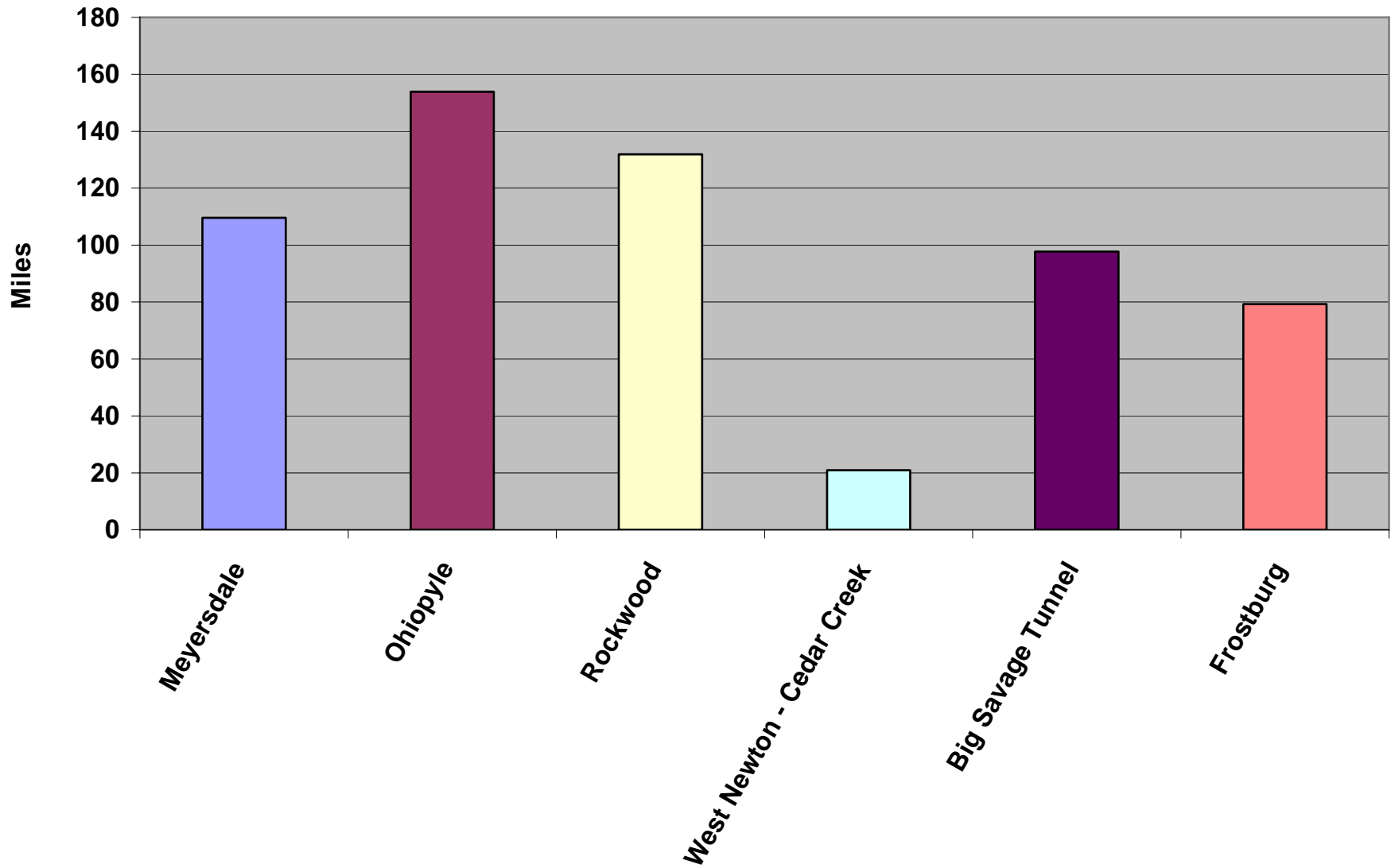


Table 1.2 - Education Level

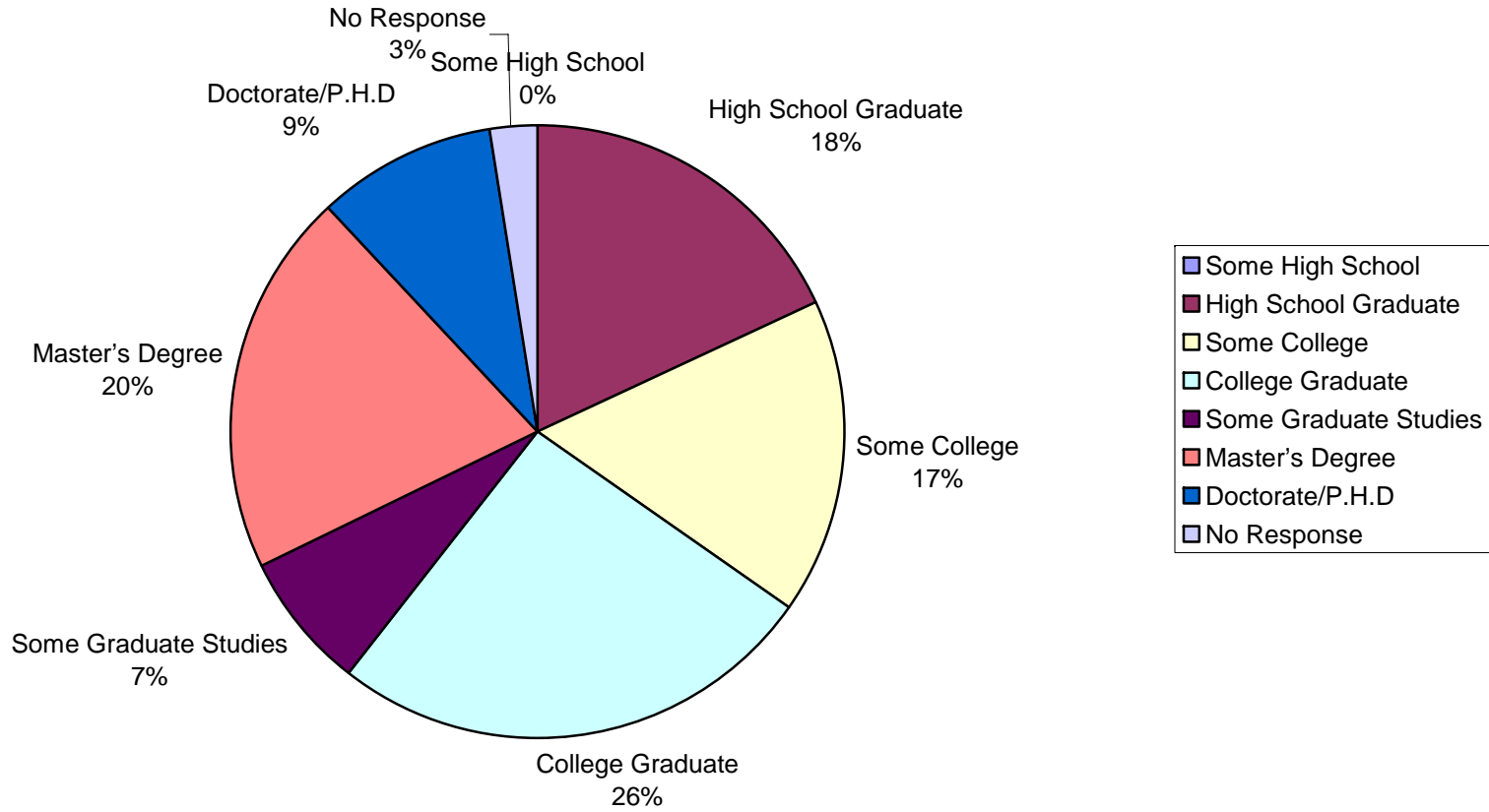


Table 1.3 - Income

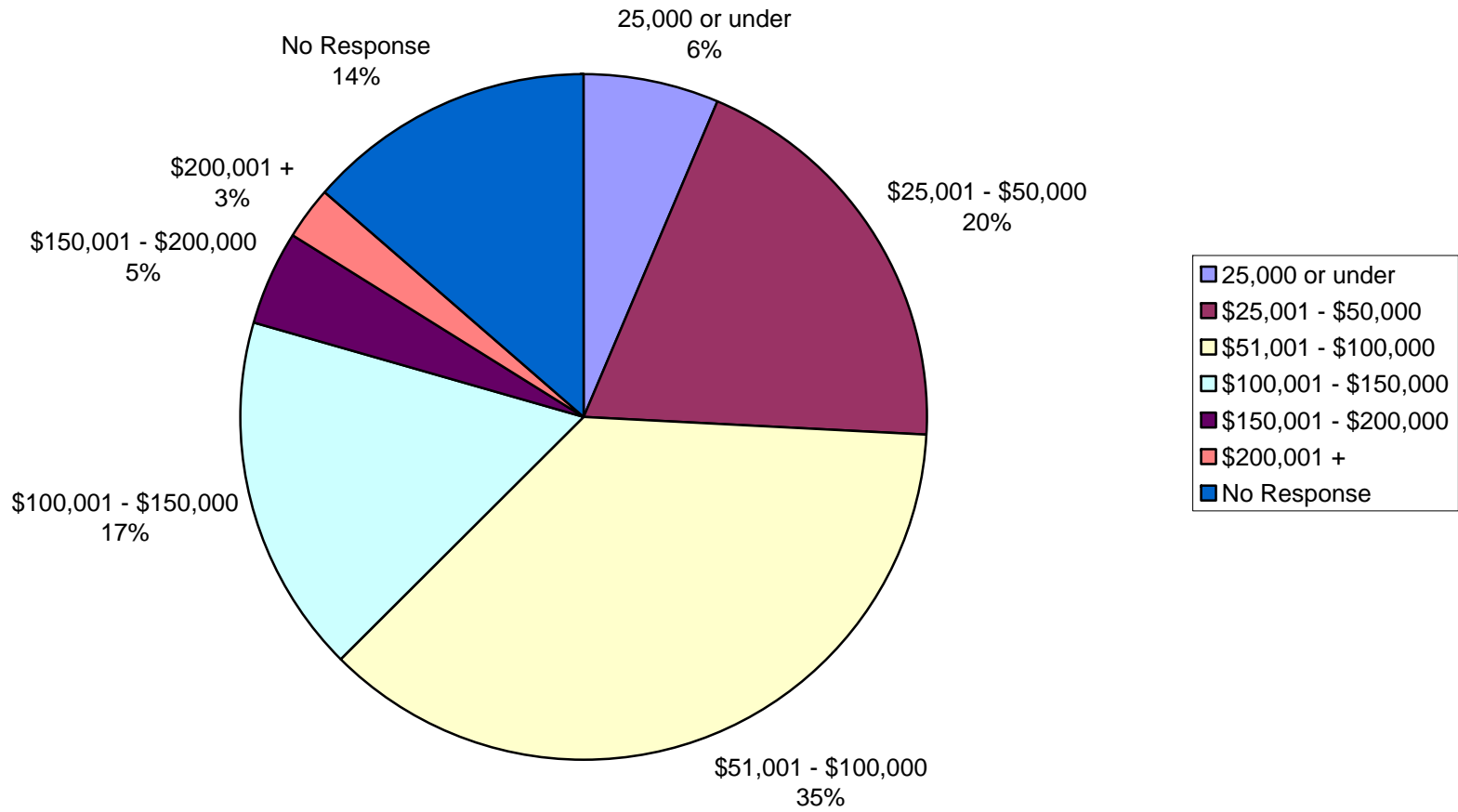


Table 2.1
Participation in Outdoor Activities

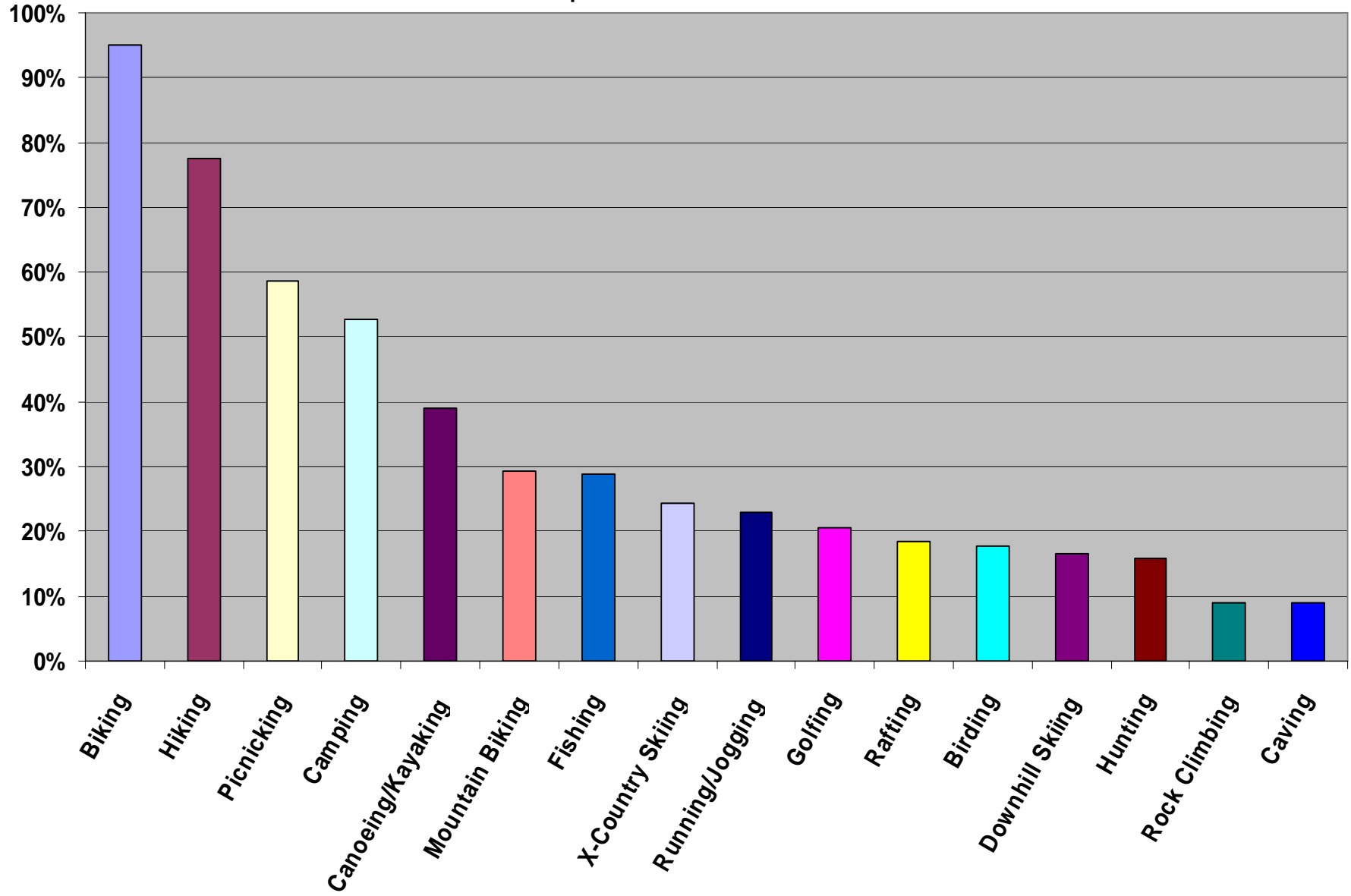


Table 2.2
Primary Motivation for Trail Use

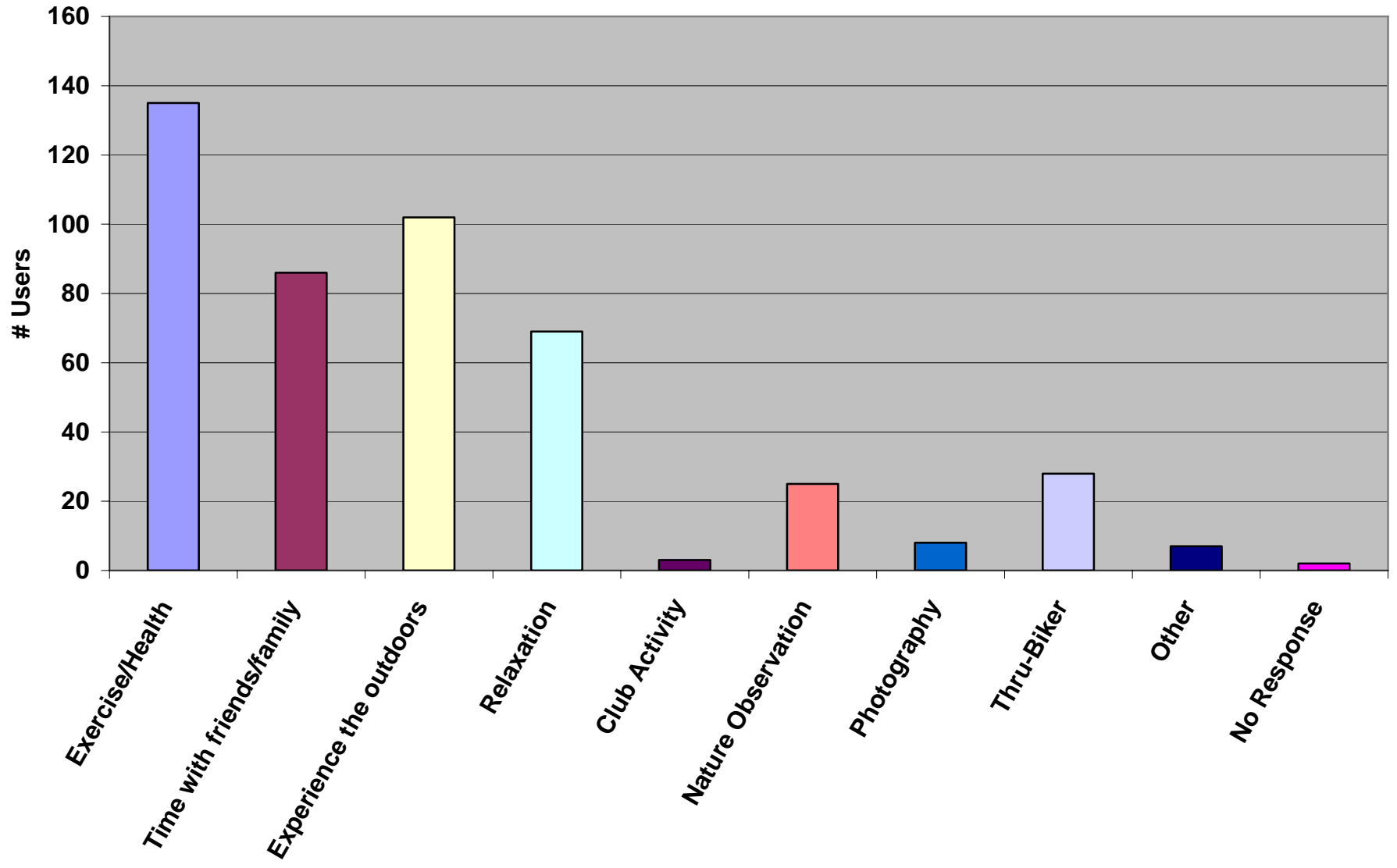


Table 2.3
Trail Use by Section

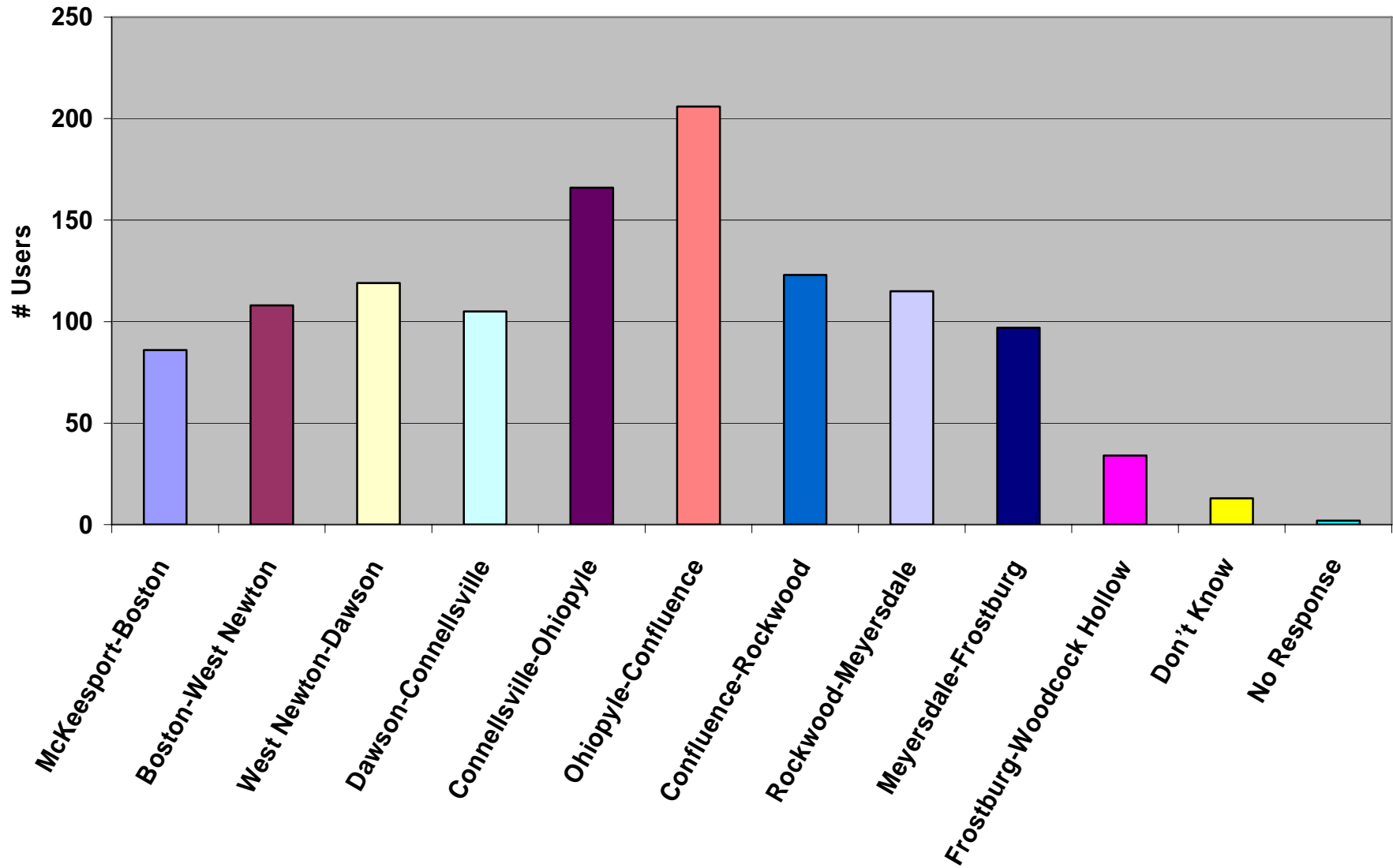


Table 3.1
Services Wanted

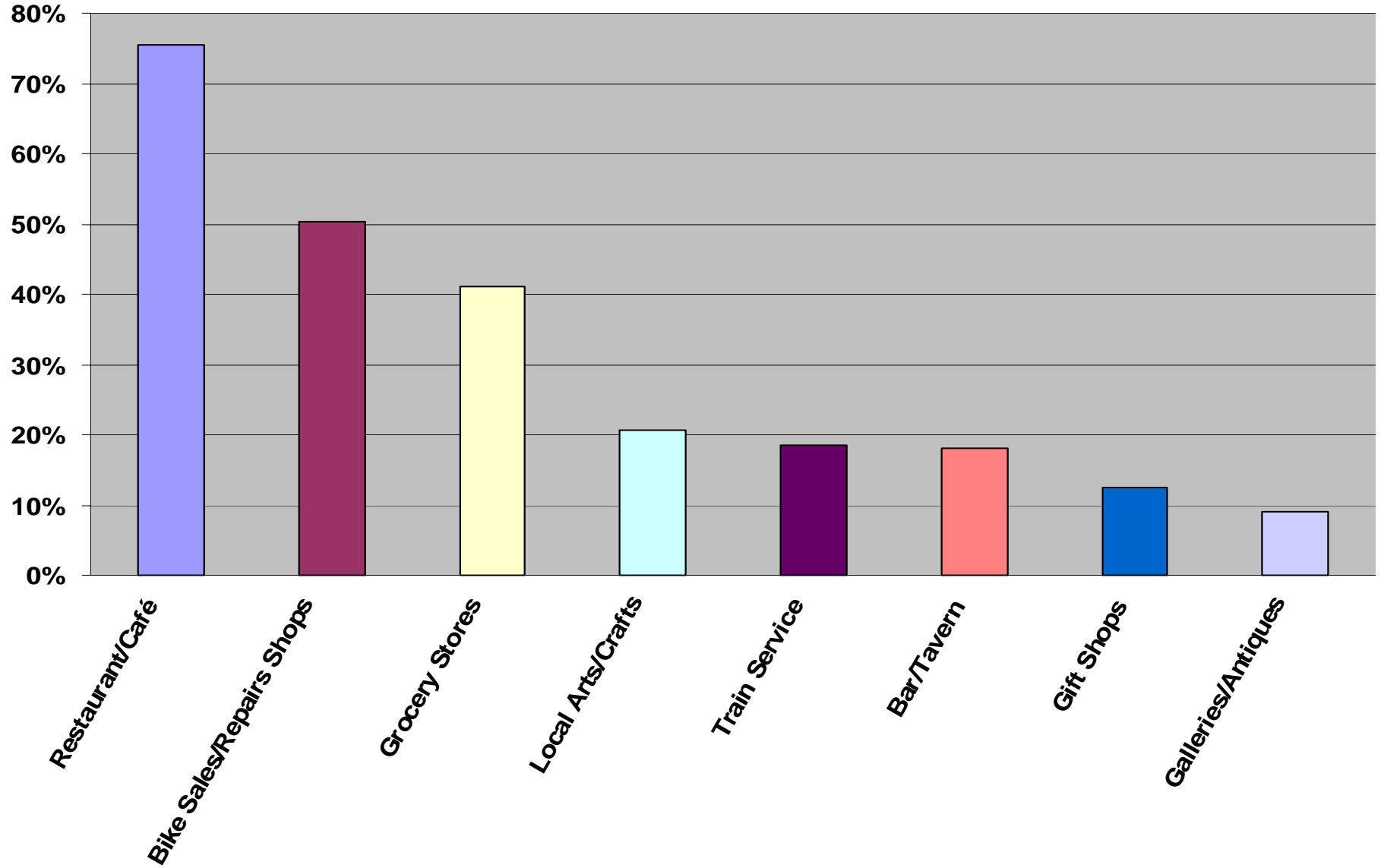


Table 3.2
Trail Towns Visited

