2015 General Trail User Survey

February 2016

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Executive Summary

In 2015, the Trail Town Program® conducted a general trail user survey online to collect data from trail users across the United States. Trail construction has been increasing across the United States. With millions of users utilizing these trails, they have the potential to generate significant economic impact in communities and cities that they run through.

The purpose of this survey is to determine what trail users are looking for based on information and feedback related to usage. Trail Town Program® has previously conducted surveys along the Great Allegheny Passage which has provided comparable data for this report. This survey was conducted online only, receiving responses from 804 users across the United States.

Respondents of this survey represented 42 states and the District of Columbia. The majority were also male, between the ages of 46 – 55. 33.8%.of respondents used trails more than once a week.

Project Background

Trail Town Program® Background

The Trail Town Program® is an initiative of The Progress Fund working in small rural towns across western Pennsylvania and western Maryland, focusing on community and economic development around trail tourism and outdoor recreation. The purpose of the Program is to ensure that trail communities and businesses maximize the economic potential of the regions trail. The Program also works to address trail-wide issues and opportunities through regional cooperation and to build the connection between trail and town.

Program Goals
1. Retain, expand, and increase revenues of existing businesses
2. Recruit sustainable new businesses
3. Facilitate collective action by the Trail Towns to create a world class recreational destination
4. Improve the buildings and infrastructure in each town to create a visitor friendly destination

Survey Background

With the boom in trail building across the United States, the Trail Town Program® wanted to gage what new and current trail users are looking for while using these natural attractions. Across western Pennsylvania, eastern Ohio, southern New York, and West Virginia, the Industrial Heartland Trails Coalition is working towards a goal of 1,400 miles of interconnected trails. The growing network of trails will attract trail users from the region as well as around the country.

Each question in this survey has been selected to collect key information about trail users, their habits, and what they are looking for during their trail experience. Many of the questions selected for this survey have been asked in prior surveys along other trails in western Pennsylvania, specifically the Great Allegheny Passage.

Methods:

From July to October 2015, the Trail Town Program® conducted an online, self- selected survey of trail users. This 18 question survey was created using Google Forms. Distribution of the survey was done online only. The survey was sent out through the Trail Town Program® Newsletter and Social Media. The survey was shared through social media with other organizations that have a trail user audience such as the Rails-to-Trails Conservancy.

2015 General Trail User Survey

2015 General Trail User Survey Questions

1. **State:**
2. **Gender:**
   a. Male
   b. Female
3. **Age:**
   a. 15 and under
   b. 16 – 25
   c. 26 – 35
   d. 36 – 45
   e. 46 – 55
   f. 56 – 65
   g. 66 and older
4. **Generally, how often do you use the trails?**
   a. Once a year
   b. A few times a year
   c. Once a month
   d. A couple times a month
   e. Once a week
   f. More than once a week
5. **What activities do you do on trails? (Select all that apply)**
   a. Walking/Hiking
   b. Biking
   c. Jogging/Running
   d. Horseback Riding
   e. Cross Country Skiing/Snowshoeing
   f. Pet-Walking
   g. Fishing/Hunting Access
   h. Other:_____
6. **What would you consider your main use of trails? (Select all that apply)**
   a. Recreation
   b. Health & Fitness
   c. Commute
   d. Training
7. **Average number of miles traveled on trail per visit:_____**
8. **Average number of hours spent on trail per visit:_____**
9. **What type of accommodations do you prefer during long distance trail visits? (Select all that apply)**
   a. Hotel
   b. Bed & Breakfast
   c. Motel

d.   Guest House
e.   Hostel
f.   Camping
g.   Friend/Relative
h.   Other:_____

10. **What would encourage you to make longer trips? (Select all that apply)**
a.   Museums/Cultural Sites
b.   River/Water Recreations
c.   Events
d.   Mountain Biking
e.   Hiking
f.   Horseback Riding
g.   Local Shops
h.   Central Business District/Main Street
i.   Site Seeing Tours
j.   Others:_____

11. **What types of services and amenities are you looking for during your trips? (Select all that apply)**
a.   Restaurant/Café
b.   Tavern/Bar/Brewery
c.   Bike Shop
d.   Retail/Gift Shop
e.   Galleries/Antiques/Local Art
f.   Convenience Store/Grocery Store
g.   Shuttle Service
h.   Lodging/Camping
i.   Public Restroom/Water
j.   Other:_____

12. **What do you typically purchase during your trips? (Select all that apply)**
a.   Beverages
b.   Ice Cream/Snack Food
c.   Recreational Equipment/Bike/Rental/Repair Services
d.   Transportation(shuttling/Taxi Service)
e.   Meals
f.   Clothing/Souvenirs
g.   Other:_____

13. **How environmentally conscious do you consider yourself? (On a scale of 1 – 5)**
a.   1 – Not at all
b.   2
c.   3
d.   4
e.   5 – High

14. **How much extra would you spend on a product that is environmentally or sustainably made?**
a.   0%
b.   1 – 5%
c.   6 – 10%
d.   11 – 15%
e.   16 – 20%
f.   21% or more

15. **How many extra blocks would you travel to patronize a sustainable or environmentally friendly business or attraction?**

a. 1 – 2 blocks
b. 2 – 4 blocks
c. 3 – 5 blocks
d. 6 – 8 blocks
e. 9 blocks or more
f. Would not travel additional distance

16. **Are you more likely to patron a business or attraction that has bike racks/storage available?**
a. Yes
b. No
c. Doesn't impact my decision

17. **What food options do you most look for?**
a. Locally Grown or raised
b. Organic
c. Vegan
d. Vegetarian
e. Gluten Free
f. Gourmet
g. Home-style Cooking
h. Fast Food (chain restaurants)
i. To – go
j. Local/Regional Favorites
k. No specific option**s**

18. **How do you typically find out about businesses or attractions in towns that you are visiting on your trip? (Select all that apply)**
a. Internet & Social Media
b. Google Maps (or other online map provider)
c. Newspaper
d. Local Trail Guide
e. Local Bike Shop
f. Travel Apps (TripAdvisor/Yelp/Other)
g. Word of Mouth
h. Business Storefront/Signage
i. Roadside Signage
j. Visitor/Welcome Center
k. Trail Side Kiosk/Informational Board
l. Other:_____
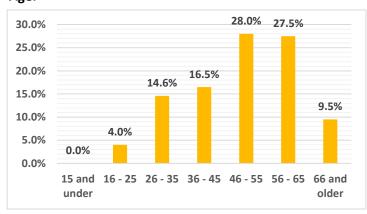
2015 General Trail User Survey Results

1. **State:**
   Trail users were asked to choose their state of residence from a dropdown list with all U.S. states, District of Columbia, and other. Within this survey, a total of 42 states and the District of Columbia were represented. 39.8% of responses came from Pennsylvania followed by Indiana at 10.3% and Missouri at 5.8%.
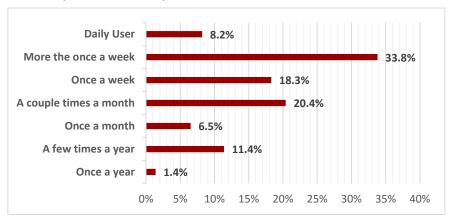
2. **Gender:**
   For those that answered the question, the majority were male at 60.7% and 39.3% were female.

3. **Age:**

   Trail users were asked to identify their age by selecting from the various pre-determined age brackets presented. The majority selected are 46 – 55 and 56 – 65. Over half of respondents (55.5%) were in these two age brackets.
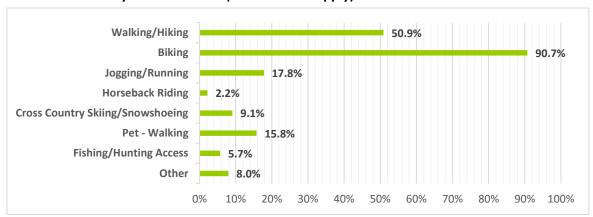
4. **Generally, how often do you use the trails?**

Trail users were asked to select their trail use frequency from multiple choice options. The majority of respondents are using the trails more the once a week at 33.8% followed by a couple of times a month at 20.4%. Compared to the 2008 Economic Impact Study completed along the Great Allegheny Passage the top two selections have seen an increase. In the 2008 study, 25.9% of respondents stated that they used the trail more the once a week and 18.7% stated that they used the trail several times a month[1].

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[1] The Great Allegheny Passage Economic Impact Study was completed in 2008 by Campos Inc. collecting 1,272 intercept surveys along the trail.

5. What activities do you do on trails? (Select all that apply)

Trail users were asked to identify activities that they do on the trails. The primary activity was biking at 90.7% followed by walking/hiking at 50.9%. Compared to the survey completed in 2008, the percentage of biking has increased slightly from 88.1%. The number of trail users that sited walking/hiking as an activity has significantly increased from 14.5% in the 2008 study. The frequently mentioned "Other" activities were mountain biking, birding/nature exploration, and photography.

6. What would you consider your main use of trails? (Select all that apply)
Trail users were asked to select their main use of trails. Respondents were allowed to select more than one option for this question. The majority of trail users stated that Recreation was their main use of trails at 80.6% followed by Health & Fitness at 69.7%.
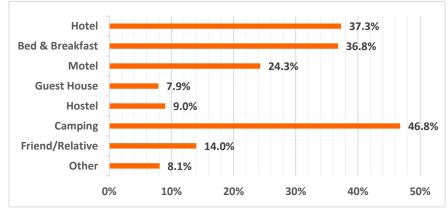
7. Average number of miles traveled on trail per visit:_____
Each trail user was asked to give an average number of miles traveled on the trail per visit. Those numbers were averaged to find the average miles for the total respondents. The average number of miles traveled on trail per visit is 23.7 miles.

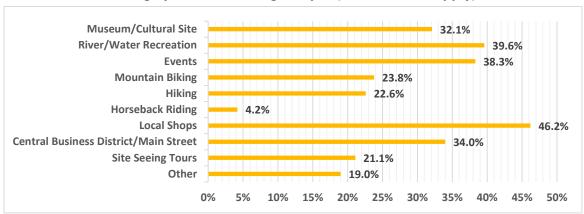**8. Average number of hours spent on trail per visit:_____**
Each respondent was asked to give an average of the amount of hours they spend on a trail per visit. Those numbers were averaged to find the average number of hours for the total respondents. The average number of hours spent on trail per visit is 3.6 hours.

9. **What type of accommodations do you prefer during long distance trail visits? (Select all that apply)**
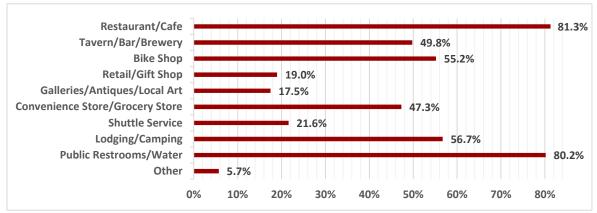

Trail users were asked to select the type of lodging they prefer when making long distance trail visits. The respondents were given the option to select all that applied. The most preferred lodging accommodation was camping at 46.8% followed by hotel at 37.3% and Bed and Breakfasts at 36.8%. In the 2008 GAP survey, users were asked about the type of accommodations they were planning to stay in at that time, were campgrounds the top choice with 38.9% followed by Bed & Breakfast at 32.6%.

10. **What would encourage you to make longer trips? (Select all that apply)**
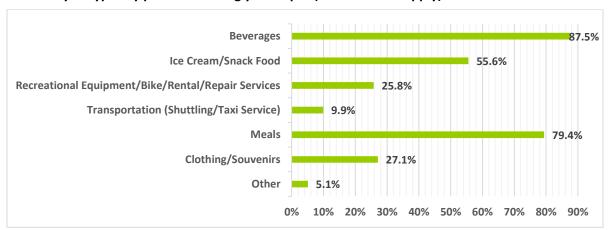

This question is meant to determine what would encourage trail users to make longer trail trips. Respondents were given the option to select all that applied from the list. The category in which the largest percentage of respondents selected was Local Shops at 46.2% and River/Water Recreation at 39.6%. Other popular responses were Museums/Cultural Sites, Events, and Central Business District/Main Street. For the 20% of the respondents that responded "Other," some of the top items that would encourage longer trips were additional lodging and food options, longer/interconnected trails, more time, and bike infrastructure (bike lanes, sharrows).

11. What types of services and amenities are you looking for during your trips? (Select all that apply)
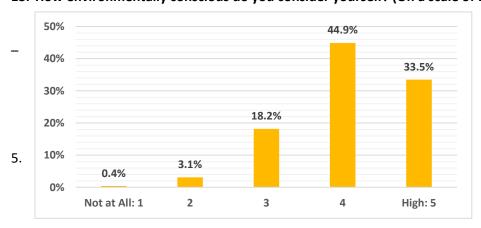

Trail users selected from a list various services and amenities they were looking for during their trips. The top two selections were Restaurants/Cafés at 81.3% followed by Public Restrooms/Water at 80.2%.

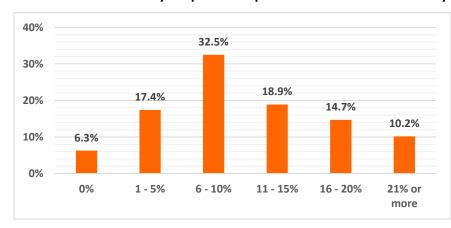**12. What do you typically purchase during your trips? (Select all that apply)**

Trail users selected from a list typical purchases they make during their trips. During their trips, the majority of respondents purchased Beverages at 87.5% followed by Meals at 79.4%.

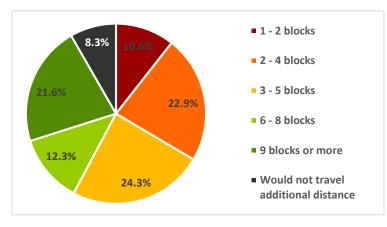**13. How environmentally conscious do you consider yourself? (On a scale of 1 – 5)**

Trail users were asked on a scale of 1 - 5 how environmentally conscious they consider themselves, with 1 being not at all and 5 being high. 44.9% of respondents rated themselves a 4 followed by 33.5% of respondents that rated themselves a From this, we are able to conclude that trail users tend to be more environmentally conscious.

14. How much extra would you spend on a product that is environmentally or sustainably made?

Trail users were asked to identify how much extra they would spend on products that are environmentally or sustainably made. Respondents were given multiple choice answers with percentage ranges in 5% increments. 32.5% of respondents selected they would be willing to pay 6 – 10% more for a product that was environmentally or sustainably made.

15. How many extra blocks would you travel to patronize a sustainable or environmentally friendly business or attraction?
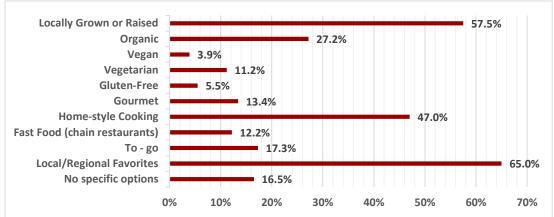

Trail users were asked to identify how many extra blocks they would travel to patronize a sustainable or environmentally friendly business or attraction. The respondents were given multiple choice answers with block ranges. It was discovered after the survey had been completed that some of the amount of blocks overlapped in the answers. 47.2% of respondents selected between 2 – 5 blocks, followed by 21.6% willing to travel 9 or more blocks.

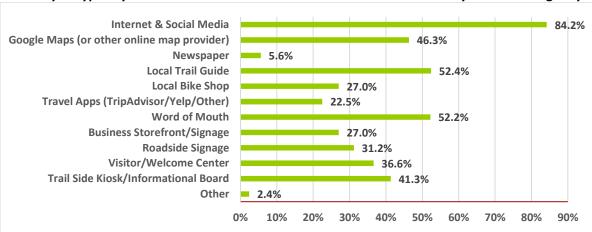**16. Are you more likely to patron a business or attraction that has bike racks/storage available?**
Trail users were asked if they were more likely to patron a business or attraction that has bike racks/storage available. Of the respondents, 76.6% selected "Yes" as their response. 1.5% of respondents selected "No" and the remaining 21.9% selected, "Doesn't impact my decision."

17. What food options do you most look for?

This question was asked to help determine what type of food options trail users looked for along their journey. Respondents were given various multiple choice answers and given the option to select all that applied. The three top categories are Local/Regional Favorites at 65%, Locally Grown or Raised at 57.5%, and Home-Style Cooking at 47%.

18. How do you typically find out about businesses or attractions in towns that you are visiting on your trip?

This question was asked to discover how trail users tend to find out about businesses and attractions while on their trip. The top response selected was Internet & Social Media at 84.2%, followed by Local Trail Guide at 52.4% and Word of Mouth at 52.2%.