

**2008 Trail Town Economic Impact Study
(Phase II: Trail User Survey)**

**For
The Progress Fund
and
Laurel Highlands Visitors Bureau**

Job #07-294b

March 9, 2009

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Background and Methodology

Background and Objectives

The Progress Fund's Trail Town Program and Laurel Highlands Visitors Bureau (LHVB) contracted Campos Inc to conduct three phases of research:

- Phase I, economic impact research among businesses located on and around the Great Allegheny Passage (completed May 2008)
- Phase II, marketing research among trail users and trail inquirers, conducted throughout 2008
- Phase III, follow-up economic impact research among businesses, to be conducted in 2009

This report details the findings from the Phase II Trail User Study, which was undertaken to update data from two previous user surveys. However, the 2002 user study was conducted by placing mail-in surveys on vehicles before the trail had been completed and the 2006 user study was only conducted during the months of August through September.

The 2008 Trail User Study (Phase II) was aimed to address the following objectives:

- To profile visitors' usage of the trail (i.e., how often they visit, purpose of visit, starting and ending locations, etc.).
- To determine group characteristics (i.e., number in party, ages, gender, income).
- To establish the ZIP code origin of the visitor party.
- To determine mode of transportation to arrive at trail and one-way distance traveled.
- To determine how much was spent in various categories such as bike rental, equipment, food and drink, gasoline, retail shopping, grocery/ convenience store purchases, lodging, etc.
- To determine how trail users originally became aware of the trail.
- To determine trail users' satisfaction levels with the trail.
- To identify any unmet needs of trail users.
- To determine reasons for not visiting the trail areas among prospective visitors that did not follow through with a visit.

Methodology

Campos Inc designed the survey instrument with input and approval from The Progress Fund, LHVB, and the Allegheny Trail Alliance (ATA). A few questions from the previous study were included in the current study to track changes over time. Comparisons were made where possible.

The survey, conducted from May 23, 2008 through October 26, 2008, was administered by volunteers to trail users at specific locations along the trail and the completed surveys were entered online. Trailhead leaders were asked to schedule volunteers according to a master schedule to ensure surveys were conducted about equally on weekends and weekdays. Volunteers were instructed to randomly select trail users who were leaving the trail or taking a break from trail use and only if they were in the trailhead parking lot or the visitor center (where applicable). The survey, on average, took the volunteers approximately 8 minutes to administer. Overall, more than 1,000 hours were invested by volunteers over the course of the 6 month period administering surveys and entering data; ultimately saving the Trail Town Program and LHVB upwards of \$25,000 in potential data collection costs.

A total of 1,272 surveys were administered at eight different locations along the Great Allegheny Passage – six in Pennsylvania and two in Maryland. The PA locations were Confluence, Connellsville, Meyersdale, OhioPyle, Rockwood, and West Newton. The MD locations were Cumberland and Frostburg. After collection had started, volunteers observed unique traffic patterns at two of the trailhead locations. As a result these locations were expanded allowing volunteers to also administer surveys at trailheads that were in very close proximity to their originally designated position. The two trailheads included in the expansion were Cedar Creek Park, PA, (attributed to West Newton, PA) and Big Savage Tunnel, MD (attributed to Frostburg, MD). Of the 1,272 surveys collected, 664 were collected on weekdays, 571 were collected on the weekend days, and 37 were collected during summer holidays (Memorial Day, 4th of July, or Labor Day).

In addition to the intercept survey, a supplemental sample was collected online from October 8, 2008 through November 29, 2008. Invitations were sent via e-mail to a list of individuals that had requested information about the trail within the past year. The survey instrument for this supplemental sample was

Background and Methodology

nearly identical to the intercept survey with the addition of several qualifying questions. The survey took an average of 10 minutes to complete online and of the 302 respondents that completed the supplemental survey, 228 visited/or planned to visit the trail and 74 respondents reported they had not/did not plan to visit. Non-visitors were subsequently asked a series of unique questions aimed at discovering reasons for not visiting the trail/region and alternative plans/trips.

All completed surveys were edited, coded, computer tabulated, and analyzed by Campos Inc. Data tables are supplied under a separate cover.

Copies of the questionnaires can be found in the Appendix.

Analytical Notes

- For this study, the total intercept sample size of 1,272 yielded results with a statistical accuracy of $\pm 2.75\%$ at the 95% confidence level and the supplemental sample size of 302 yielded results with a statistical accuracy of $\pm 5.64\%$ at the 95% confidence level. This means that there is a 1 in 20 chance that the “true” measurements will fall outside of these ranges.
- Where appropriate, statistical testing was conducted to determine significant differences between *locations of interview*, *typical seasonal use*, and *overnight stays* for the intercept sample.
- Due to small sample sizes, caution should be used when interpreting the results of subgroup analysis. While subgroups may be too small to draw statistically valid conclusions, patterns may emerge that can be useful.
- Throughout the report, percentages may not add to 100% because of rounding and/or multiple responses.
- The term *net* is used in some tables in this report. *Net* is the summary of a group of related responses and represents the percentage of *respondents* who made one or more comments in that category/group.
- *Base* is the number of respondents who were asked a particular question. At times, questions are skipped by some respondents based on their answers to previous questions.
- A *top-two box* score refers to the two highest responses on a rating scale (for example, *excellent* and *very good*), that have been combined for reporting purposes.
- Several tables throughout the report show only the most frequently mentioned responses. For a complete listing of responses, please refer to Computer Tables, furnished under a separate cover.



Executive Summary

Key Points

- 40.8% of the trail users surveyed planned an overnight stay as part of their trail visit.
 - 34.8% of overnight visitors earn an annual household income of over \$100,000 (compared to just 6.2% of local trail users earning the same amount).
 - Overnight visitors spend an average of \$98 a day in trail communities and on lodging, compared to local trail users spending an average of \$13 each trail use.
 - 96.9% of overnightriders reported biking as their primary activity while using the trail, versus 88.1% of all trail users reporting biking as their primary activity.
- The average distance traveled to arrive at the trailhead was 131 miles, and 289 miles for overnightriders. The mean distances were 20 miles and 90 miles, respectively.
 - Surveyed trail users traveling 50 miles or more to get to the trail spent approximately twice as much in trail communities as those traveling less than 50 miles.
- The majority of trail users that were surveyed started and ended their trips in the same location.
- The majority of surveyed trail users (83.1%) were 35 years of age or older, with the age category of 45-54 (28.0%) being mentioned most often.
- The majority (65.1%) of trail users that were surveyed were male.
- Trail users from 670 unique postal codes were surveyed.
- The most frequently mentioned suggestion for improving the trail was better signage both on and off the trail.

Executive Summary

Key Findings

In both 2002 and 2006, while the trail was still under construction and/or trail connections were just recently completed, important information was gathered from trail users at many of the same trailhead locations. It should be noted that the methodologies and survey instruments utilized in the previous studies were not identical to the 2008 study (accordingly, some of the trail towns were not yet as developed). Thus, a comparative analysis between the previous studies and the 2008 study is therefore limited.

The online supplemental sample, collected among trail inquirers, has been analyzed separately in the executive summary; where appropriate, similarities and/or differences to the intercept sample were highlighted in the section.

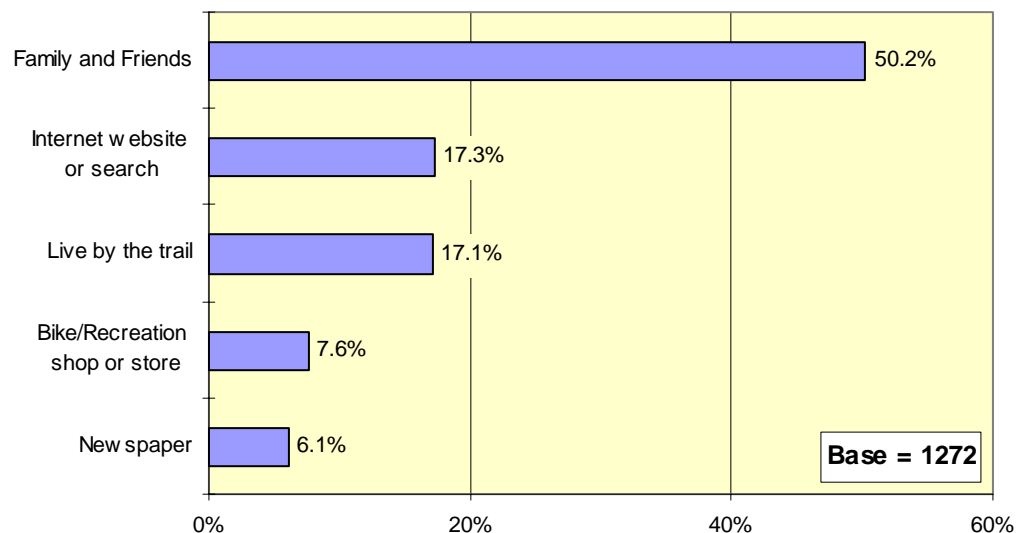
Total Analysis - 2008 Trail User Study

Based on the responses received from surveyed trail users, this summary will profile several key areas:

- Trail users' usage patterns
- Trail users' spending habits
- Trail users' group composition
- Trail users' satisfaction and suggestions

When trail users were asked how they originally heard of or found out about the trail, the most popular response by far was *family and friends*. The only other sources of awareness worthy of note were *internet and/or the live by the trail*.

Reported Source of Trail Awareness



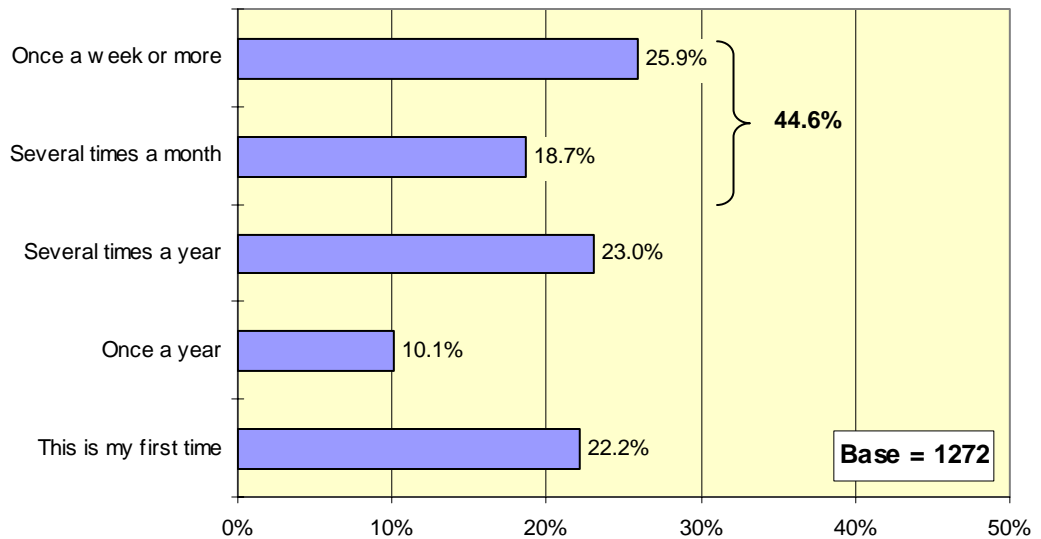
Executive Summary

Trail Users' Usage Patterns

Trail users tended to visit the trail with at least one other person as only one-third stated that they were using the trail alone.

The majority of the respondents reported using the trail prior to being interviewed (i.e., not first time users), with nearly half stating that they used the trail at least *several times a month*.

Reported Frequency of Trail Use



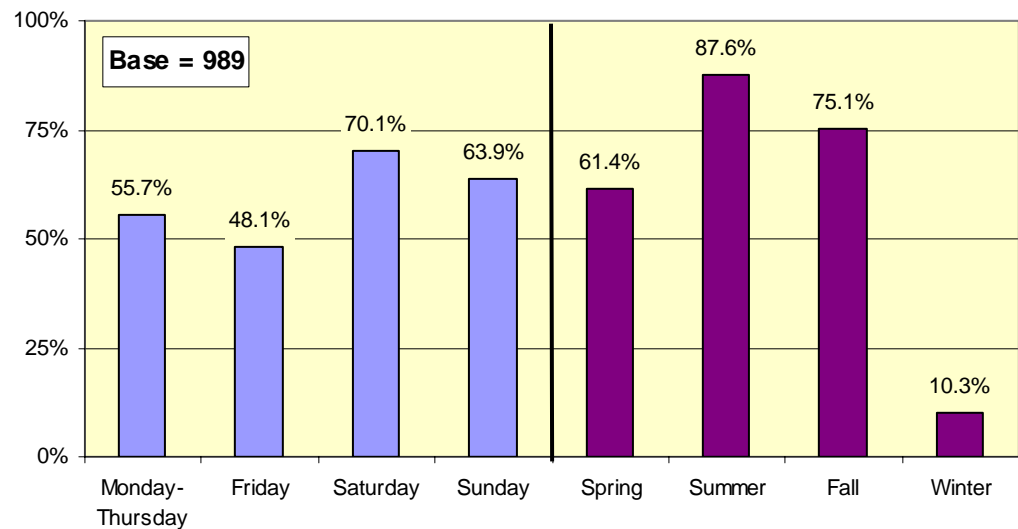
Accordingly, the majority of the respondents/ their group members planned to use the trail more than once this calendar year, with over one-third stating that they planned to use the trail *more than 10 times*.

Among those who had previously visited the trail, typical use was mentioned most often on *weekends* and during the *summer*. However, typical use of the trail during the *week* and during both the *fall* and *spring* seasons was reported by more than half of the respondents. The infrequent mentioning of *winter* could have been influenced by the dates that interviews were being administered.

See graph on the following page.

Executive Summary

Reported Trail Use by Weekday/Season



Similar to previous years, the majority of the trail users mentioned living in Southwestern PA/Northern MD regions; however, the number of trail users that reported living in the Washington DC/Baltimore, Southeastern PA/the Keystone Corridor (Harrisburg to Philadelphia), and Cleveland, OH regions were also slightly higher compared to other metropolitan areas.

Reported Location of Residence

	Trail Users	Online Inquiry	
		Visitor	Non-Visitor
Bases:	1272	228	74
(Net) Pennsylvania	57.5%	32.5%	25.7%
-Southwestern, PA	51.7%	21.9%	12.2%
-Southeastern, PA and the Keystone Corridor	3.1%	4.8%	8.1%
(Net) Other	40.2%	61.0%	73.0%
-Cumberland, MD	18.1%	3.1%	0.0%
-Washington DC/Baltimore, MD	6.6%	19.7%	21.6%
-Cleveland, OH	2.4%	6.6%	4.1%

***Among the remaining 13%, no singular region/city was reported by more than 2% of the respondents.**

In addition, the majority of the trail users lived in major metropolitan areas; but, trail visitation occurring in the less densely populated areas between Ohiopyle and Frostburg was very high, suggesting that metropolitans were using the rural sections of trail more often. The average distance traveled by trail users to arrive at the trailhead was 131 miles, a significant increase over 2002 (44 miles).

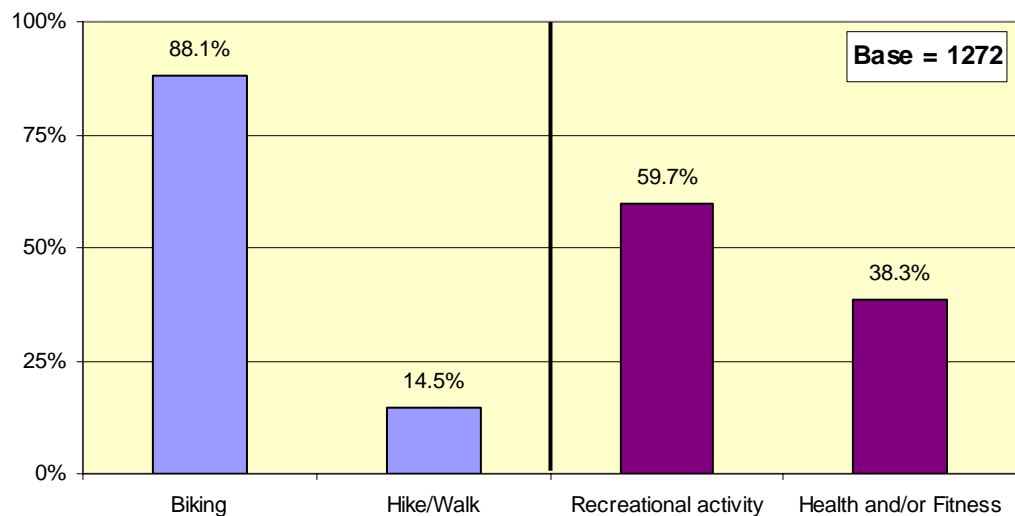
Executive Summary

However, this figure was likely skewed by several respondents that cited extremely large travel distances as over half reported traveling *less than 25 miles* and the median distance was 20 miles; median distance was not reported in 2002. Similar to previous years, the majority of visitors reported traveling to the trail either in *their own* or a *friend's car/truck/van* and one in five mentioned traveling to the trailhead on a *bike*.

When asked about their/their groups' primary reason for using the trail that day, the majority, six in ten, either directly or indirectly mentioned *recreational activities* and four in ten mentioned *fitness training and/or health and exercise*. This differed slightly from what was observed among trail users in 2006 where over one half cited *exercise/health*.

At the time they were interviewed, trail users/groups reported to participating in a wide variety of activities; however, *bike riding* was mentioned considerably more often than any of the others and *hiking/walking* was the only other activity mentioned by more than one in ten respondents.

Reported Trail Use Activity/Purpose



In order to participate in one of the aforementioned activities, only one in twenty trail users interviewed stated that they and/or one of their group members rented the equipment/gear they were using on the trail that day. The vast majority of the trail users and/or their group members brought all of their own equipment/gear with them to the trail.

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Similar to what was observed in previous studies, *Ohiopyle* was once again among the most popular as a starting and/or ending point along the trail. Compared to previous studies, a significant increase in activity was observed in the southernmost locations along the trail. Also, the number of trail users/groups participating in “through” trips between Southwestern PA and Maryland trail towns increased dramatically (14.6% of total). However, starting and ending in the same trail location was cited most often.

See chart on the following page that compares respondents’ Reported Starting Locations against their Reported Ending Locations.

Reported Starting Locations vs. Reported Ending Locations (Sorted Geographically)

		Started on the Trail													
		Pitts- burgh	McKee- sport	Boston	Suters- ville	West Newton	Conn- ellsville	Ohio- pyle	Con- fluence	Rock- wood	Meyers- dale	Frost- burg	Cum- berland	Wash- ington DC	
Bases:		47*	58	105	25*	114	129	163	73	116	57	166	84	46*	
Ended on the Trail	Pittsburgh	28*	2%	7%	0%	0%	0%	0%	0%	0%	0%	4%	0%	13%	22%
	McKeesport	30*	2%	7%	0%	0%	0%	1%	0%	0%	0%	4%	1%	13%	22%
	Boston	69	0%	0%	52%	0%	1%	0%	0%	0%	0%	2%	0%	2%	20%
	Sutersville	21*	0%	0%	0%	84%	0%	0%	0%	0%	0%	0%	0%	0%	0%
	West Newton	91	0%	0%	1%	8%	74%	1%	1%	0%	1%	0%	1%	0%	0%
	Connellsville	97	0%	0%	0%	0%	0%	66%	0%	0%	1%	0%	1%	4%	0%
	Ohio-pyle	190	4%	7%	1%	0%	2%	12%	85%	11%	1%	0%	4%	2%	0%
	Confluence	74	0%	2%	5%	0%	1%	5%	4%	64%	3%	2%	0%	4%	0%
	Rockwood	101	0%	2%	1%	0%	0%	0%	1%	0%	79%	2%	1%	1%	2%
	Meyersdale	45*	0%	2%	1%	0%	0%	0%	0%	3%	3%	51%	3%	2%	2%
	Frostburg	158	0%	0%	0%	0%	1%	1%	2%	4%	2%	14%	71%	24%	0%
	Cumberland	162	17%	41%	23%	0%	7%	1%	3%	11%	10%	23%	10%	36%	7%
	Washington DC	103	77%	36%	13%	0%	10%	2%	2%	3%	2%	4%	2%	0%	7%

*Caution: small base sizes

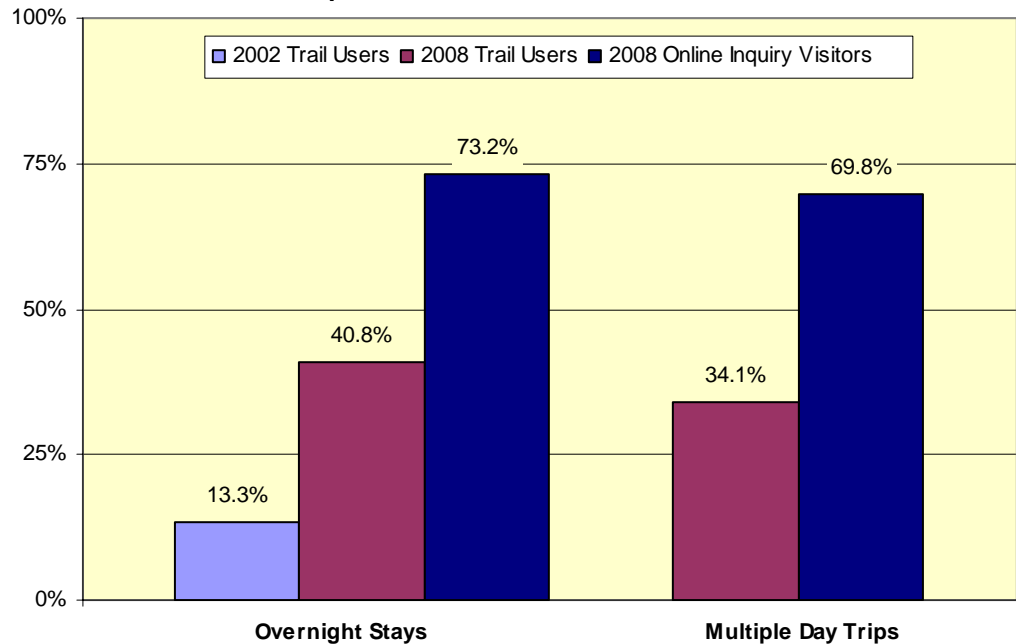
Start and End at the same location

Long Distance through trips

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Most likely a direct result of the previously mentioned changes in travel/usage, the frequency at which overnight stays and multiple day trips were reported increased significantly in 2008 compared to 2002.

Reported Trail Use Patterns



Trail users that had or were planning an overnight stay in conjunction with their trip were asked to name the type of accommodations at which they planned to stay. Approximately one-third each cited either a *campground* or *bed and breakfast*, followed closely by about one-quarter that mentioned a *hotel/motel/hostel*.

Trail Users' Spending Habits

Two-thirds of the trail users stated that they/their group had/planned to make purchases or rent equipment in the communities along the trail or trailhead that day.

They were then asked to estimate how much they spent/planned to spend on a variety of items/services in the communities the day of their visit. Trail users estimated their average spending to be \$54 per person. However, differences in estimated spending were observed between the types of trail users. Those who reported an *overnight stay* in conjunction their trip averaged spending \$98 per person, while both local trail users and those that mentioned participating in a *day trip* each averaged spending \$13 per person. Respondents who had reported purchasing individual packages estimated average spending of \$350 per package.

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Those that had reported visiting the trail with at least one other person were then asked to estimate how much their group spent/planned to spend in the communities that day on the same items/services. Visitors estimated average spending of \$144 per group and once again; differences in estimated spending were observed between the types of users. Those who reported an *overnight stay* in averaged spending \$218 per group, *day trippers* averaged spending \$42 per group, and *local* users averaged spending of \$29 per group. Visitors who reported purchasing group packages estimated spending \$2,970 per group package. The average group consisted of 4 members, including the respondent, and no specific package type was identified frequently enough to calculate independent averages.

- Trail users/their group members reported spending money on *beverages* and *restaurants* significantly more often than the other items/services.
- Based only on those who reported making purchases of each of the individual items/services, *transportation* fees had the largest per person average. The average, per person, spending estimates for *clothing*, *daily equipment rentals*, and *restaurants* were not quite as high as *transportation*, but were still significantly higher than the other items/services.

Reported Spending by Trail Users

	Trail Users Spending			
	Personal		Group	
	% Purchasing	Mean	% Purchasing	Mean
Bases:	858		635	
Total (excluding package & lodging costs)	67%	\$23	33%	\$74
Bases: Specific Items/Services	858	14*-521	635	13*-415
-Beverages	56%	\$6	52%	\$18
-Clothing	7%	\$22	5%	\$57
-Candy/Snacks	21%	\$6	21%	\$17
-Daily Equipment Rental (bikes, etc.)	5%	\$22	8%	\$57
-Ice Cream	24%	\$5	27%	\$16
-Restaurants	56%	\$20	65%	\$65
-Souvenirs	10%	\$13	13%	\$25
-Transportation (shuttling, taxi, etc.)	2%	\$51	2%	\$117
-Other (sunscreen, film, etc.)	8%	\$15	9%	\$21
Individual/Group Package Costs	8%	\$350	11%	\$2,970

*Caution: small base sizes

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The majority of the trail users that reported overnight stays while using the trail mentioned *two or more* stays in conjunction with their trip and estimated spending an average of \$65 per night on accommodations. However, when analyzed by *accommodation type* differences were observed in average nightly costs. Trail users reported spending \$24 per night at *campgrounds*, \$96 per night at *bed and breakfasts*, and \$87 per night when staying at a *hotel/motel/hostel*.

Similar to previous studies, the further trail users reported traveling to arrive the trail, or the further they traveled along the trail, the more they tended to spend on both items/services and accommodations. Respondents traveling 50 miles or more to get to the trail estimated spending/planning to spend approximately twice as much as those traveling less than 50 miles to get to the trail.

Trail User's Group Composition

Two-thirds of the trail users that were interviewed stated that they were visiting the trail with at least one other person and the average reported group size was four persons (including respondents). However, this average was most likely skewed high by several very large groups as pairs were reported most often, by four in ten, and the median group size was two.

According to trail users, nearly all of the groups primarily consisted of *friends/family members*.

The majority of the trail users and their fellow group members were *35 years of age or older*, with the age category of *45-54* being mentioned most often for both.

Over six in ten trail users interviewed were *male* and the over half described their household income as being *\$50K or more*.

Trail User's Satisfaction and Suggestions

By and large, trail user's satisfaction was extremely positive with fewer than 5% providing a rating lower than *good* when asked to rate their overall experience.

When asked to state what they liked most about the trail and/or the trail communities, the majority either stated that *no improvements were necessary* or they expressed praise for the relaxing *atmosphere*, *friendly people*, and/or *overall beauty of the trail*.

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When asked to offer suggestions of what they feel could be improve on the trail/ in the trail communities or make their experience better, the most frequently mentioned suggestion by far was for *better signage* both on and off the trail. *Smoother trail surface/more pavement, more water fountains and restrooms, and more restaurants/sandwich shops* in close vicinity to the trailheads were also mentioned with some frequency.

Segmentation Analysis

In order to identify how types of visitors differed in behaviors, trail users were divided into three separate segments for comparative analysis:

- **Overnighters:** Trail users that reported or planned an overnight stay in conjunction with their trip.
- **Day Trippers:** Trail users that did not live in the same zip code as one of the eight trailhead locations and did not report/plan an overnight stay in conjunction with their trip.
- **Locals:** Trail users that reported living in the same zip code as one of the eight trailhead locations and did not report/plan an overnight stay in conjunction with their trip.

The trailheads come into view as travel destinations as the vast majority of the trail users were qualified as either *overnighters* (40.8%) or *day trippers* (40.2%) and only about one in five (19.0%) were classified as *locals*.

Overnighters

- The vast majority (86.3%) of the overnighters reported that they and/or their group members had/planned to spend money in the trail communities while using the trail.
 - When estimated average spending within the trail communities (\$33) was combined with estimated average spending per night on overnight accommodations (\$65), overnighters estimated spending an average of **\$98 a day** while using the trail.
 - The average number of overnight stays, reported in conjunction with their trips, was 2.4 and the median value was 2 nights. Thus, overnighters estimated spending an average of **\$196 per trip** while using the trail.
- Nearly half (43.7%) of the overnighters mentioned that this was their first trip to the trail, followed by about one in five (17.9%) who only visit the

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trail once a year. Very few mentioned visiting *several times a month* or *several times a week*.

- Nearly all (96.9%) of the overnighters reported *biking* while using the trail and the vast majority (82.7%) mentioned doing so for *recreation*. Overnighters were significantly more likely than the other segments to report that they or at least one of their group members rented/planned to rent equipment while using the trail (8.9%).
- The average one-way distance traveled by overnighters to the trail was 289 miles and the median distance was 90 miles. Both of these levels were dramatically greater than those observed among the other segments.
- Excluding *Ohiopyle*, which was named by the vast majority as both a starting and ending point, overnighters were more likely to be *through trippers*. Specifically, *Boston*, *McKeesport*, and *Pittsburgh* were among the most frequently mentioned starting locations while *Washington, DC* and *Cumberland* were the most frequently mentioned ending locations.
- Similar to the other segments, nearly half (48.4%) of the overnighters reported originally hearing about the trail from *family or friends*. Overnighters however, were significantly more likely to have mentioned *internet search/web site* (29.3%) compared to the other two segments.
- Overnighters provided the highest average overall satisfaction rating (4.7) compared to the other segments, with three-quarters (75.2%) providing a top-box, *excellent*, score.
- Demographic profile of overnighters:
 - Gender: male (70.9%), female (29.1%)
 - Age: 16-34 (13.9%), 35-64 (77.8%), 65+ (8.3%)
 - Household Income: Less than \$50K (19.4%), \$51K–\$100K (32.9%), +\$100K (34.8%)

Day Trippers

- Over half (56.9%) of the day trippers mentioned that they and/or their group members had/planned to spend money in the trail communities while using the trail.
 - Their estimated average spending within the trail communities was \$13 a day.
- The majority (60.3%) of the day trippers reported that they use the trail at least *several times a month* and one-quarter (25.2%) cited using the trail

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several times a year. Furthermore, only half as many respondents reported both *once a year* and *this is my first time* combined (14.5%) than did *several times a week* (37.2%).

- The vast majority (89.4%) reported *biking* while using the trail; however, *hiking/walking* (13.9%) was more popular among day trippers than *overnighters* (7.5%). Among day trippers, *health and exercise/fitness* (51.9%) was mentioned slightly more often than *recreation* (47.2%) as a primary reason for using the trail. Although popular among each segment type, the *spring* season was observed to be most popular among day trippers.
- Day trippers average travel distance one-way to the trail was 29 miles and the median distance was 16 miles. Despite being drastically lower than the levels observed among the *overnighters*, these distances were still significantly greater than those reported by the *locals*.
- The vast majority of the day trippers reported ending at the same location at which they started while using the trail.
 - Accordingly, *Connellsville, Ohio*, *Rockwood*, and *West Newton/Cedar Creek* were both the most frequently mentioned starting locations and ending locations.
- Similar to the other segments, approximately half (53.6%) of the day trippers mentioned originally hearing about the trail from *family or friends*, followed by one in five (20.0%) who stated that they *live by the trail*.
- The average overall satisfaction score provided by day trippers regarding their experience on the trail was 4.6, with over 90% giving a top-two box rating.
- Demographic profile of day trippers:
 - Gender: male (63.6%), female (36.4%)
 - Age: 16-34 (11.7%), 35-64 (68.7%), 65+ (19.6%)
 - Household Income: Less than \$50K (31.1%), \$51K–\$100K (35.6%), +\$100K (11.4%)

Locals

- Approximately half (49.2%) of the local trail users reported that they had/planned to spend money in their communities while using the trail.
 - They estimated that their average spending in the trail community, the day they used the trail, to be \$13.

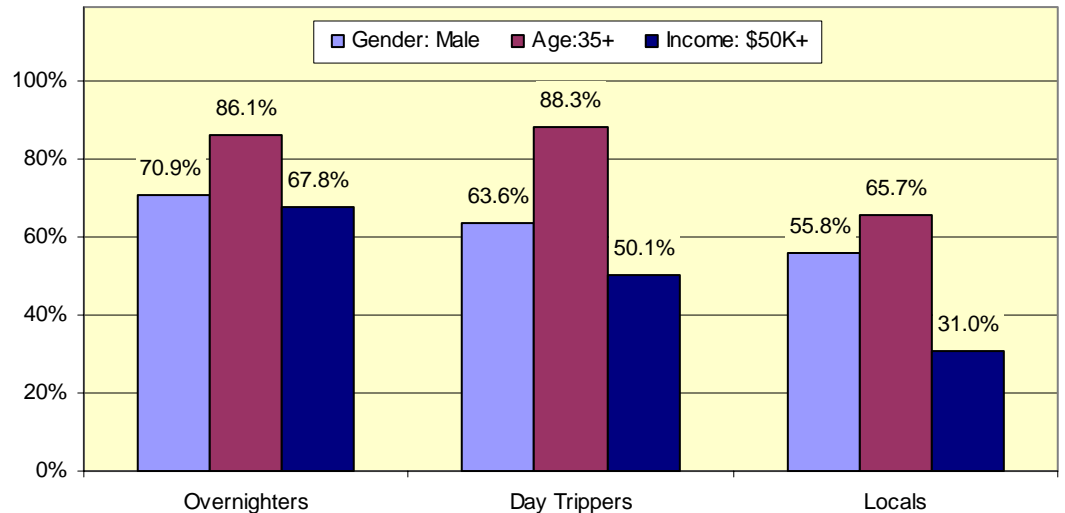
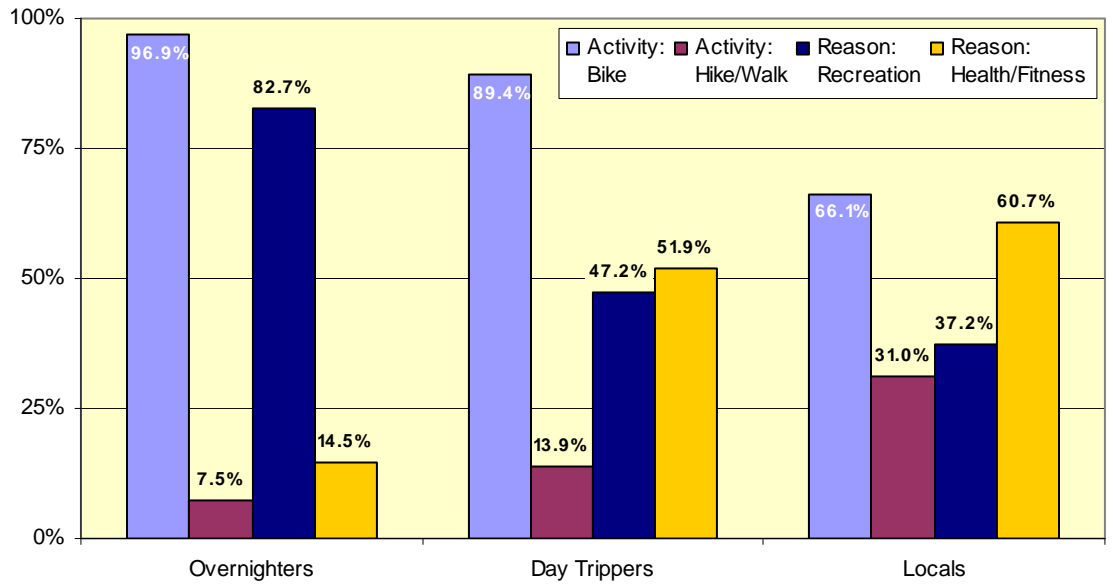
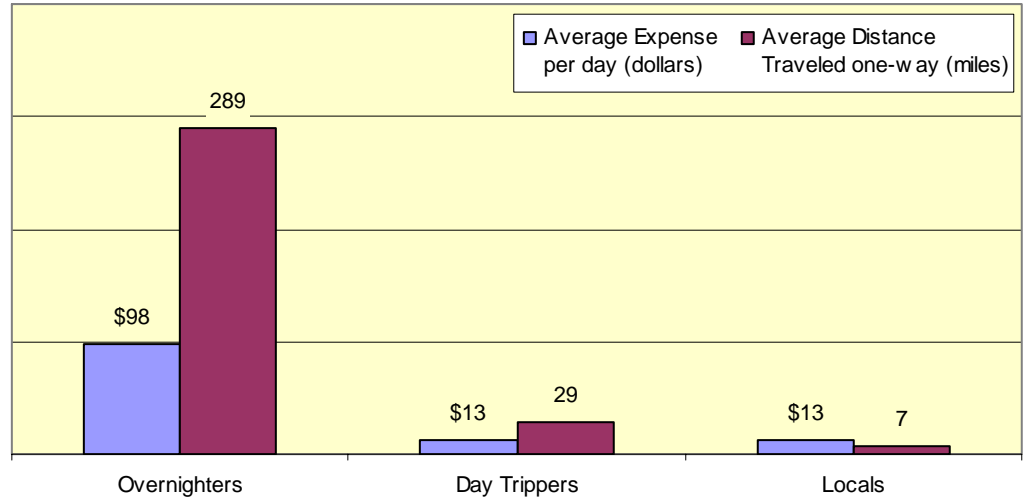
Executive Summary

- Three-quarters (75.2%) of the locals mentioned using the trail at least *several times a month* while 17.4% that reported using the trail *several times a year*. Very few locals reported using the trail *once a year* or stated that *this is my first time*.
 - *Biking* (66.1%) was the most frequently mentioned activity performed on the trail; however, the percentage of locals that mentioned *hiking/walking* (31.0%) was significantly greater than the levels observed among the other segments. *Jogging* (9.1%) was also mentioned significantly more often by local trail users.
 - Completely opposite of overnights, the majority (60.7%) of local trail users reported using the trail for *health and exercise/fitness* compared to 37.2% that mentioned using the trail for *recreation*.
- On average, locals traveled 7 miles one-way to get to the trail. However, the median distance only totaled 3 miles as the majority (60%) of the locals reported traveling less than five miles.
- For the most part, local trail users tended to start and end at the same location.
 - Interestingly, half (51%) of the local trail users reported starting on the trail at *Frostburg/Big Savage Tunnel*.
- Similar to the other segments, about half (46.7%) of the local trail users reported hearing about the trail from *family or friends*, followed by more than one-third (36.4%) that cited *live by the trail*. A significantly greater percentage of the local trail users mentioned hearing about the trail for a *bike/recreation shop or store* (14.5%) compared to the other segments.
- Even though ratings were still extremely positive, the majority (84.9%) gave a top-two box score; compared to the other segments local trail users provided the lowest average overall satisfaction ratings regarding their experience on the trail (4.4).
- Demographic profile of locals:
 - Gender: male (55.8%), female (44.2%)
 - Age: 16-34 (34.3%), 35-64 (51.7%), 65+ (14.0%)
 - Household Income: Less than \$50K (63.2%), \$51K–\$100K (24.8%), +\$100K (6.2%)

The following 3 graphs summarize some of the key differences between the segments.

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Key Differences Observed Between Segments



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Supplemental Survey Analysis

A total of 3,036 e-mail invitations were sent out to individuals that had inquired online about the trail within the previous year. Since it was unknown whether or not any of these individuals actually visited the trail, a small set of screener questions were included in the supplemental survey that were not included in the survey that was administered along the trail.

In total, 302 completed surveys were collected, with 228 reporting that they had visited the trail after their online inquiry and 74 reporting that they did not.

Similar to those interviewed along the trail, a large percentage visitors and non-visitors that inquired online originally heard about the trail through *family and friends*. However, significantly more online inquirers mentioned hearing about the trail from an *internet website or search* compared to intercepted trail users.

Reported Source of Trail Awareness

	Online Inquiry		Intercept
	Visitor	Non-Visitor	Trail Users
Bases:	228	74	1272
Internet website or search	57.9%	41.9%	15.3%
Family and Friends	36.1%	33.8%	50.2%
Magazine	13.2%	6.8%	4.0%
Newspaper	13.2%	9.5%	6.1%
Bike/Recreation shop or store	8.3%	4.1%	7.6%
Live by the trail	7.5%	0.0%	17.1%
Don't know/don't recall	8.3%	9.5%	6.4%

Online Inquiry: Visitors

Those who visited the trail were then asked to name any other Southwestern PA/Northern MD activities and/or attractions that they participated in addition to visiting the trail. *Attractions*, such as *Fallingwater* and *Ohiopyle* were identified most often, by approximately six in ten.

Next, visitors were asked if they had been approached by a volunteer while using the trail and asked to complete a survey. The vast majority of the visitors stated that they were not asked to complete a survey. Among the small number

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of respondents that had been approached, 13 admitted to completing the survey. Those respondents skipped directly to the end of the survey, where they provided basic demographic information (which was included in the results), and were thanked for their time. All visitors that had not been approached to complete a survey while visiting the trail or that had declined participation proceeded on and completed the online inquiry version of the trail user intercept study.

Trail Users' Usage Pattern and Group Composition

Most notably, inquirers were far less likely to have begun and ended at the same trailhead location, a trend observed among the majority of those interviewed along the trail. Furthermore, significantly fewer inquirers mentioned participating in long distance through trips compared to intercepted trail users. Interestingly however, inquirers were significantly more likely to have spent successive days on the trail as well as report an overnight stay in conjunction with their trip.

Inquirers previously used the trail much less often, with over half reporting that they were first-time visitors and compared to the trail users interviewed on the trail, inquirers/their group members planned significantly fewer trips to the trail this calendar year.

Despite all the differences between the samples, online inquiry visitors were similar to intercepted trail users in many ways as well. The majority of the inquirers also visited the trail with at least one other person and their most frequently mentioned form of transportation to get to the trail was either a *personal* or a *friend's car/van/truck*. Like the intercepted trail users, those inquirers that had previously visited the trail also admitted to typical use on the *weekends* and during the *fall* and *summer* months. In addition, the vast majority of their groups consisted of *friends/family*, *bike riding* was the most frequently mentioned activity, and their/their groups' primary reason for using the trail that day was for *recreation*.

Trail Users' Spending Habits

With very few exceptions, the reported spending habits of trail users that inquired online before visiting were significantly greater than those observed among visitors interviewed while on the trail. However, these differences were

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most likely due to the fact that online inquirers, in addition to reporting longer average travel distances, were more likely to spend successive days on the trail and mention overnight stays.

More than eight in ten visitors that had previously inquired online indicated that they/their group spent money in the communities along the trail the day of their visit. Inquirers estimated, excluding individual package costs, spending an average of \$186 per person. However, differences were observed in estimated spending between the types of trail users. Those who reported an overnight stay in conjunction with their trip averaged spending \$203 per person, while average spending among *local* trail users and/or those that mentioned participating in a *day trip* was only \$64 per person. Visitors that indicated purchasing a package estimated an average spending of \$147 per individual package.

Those who reported traveling with at least one other person and also reported spending money in the communities along the trail estimated spending an average of \$271 per group and once again; differences in estimated spending were observed between the types of users. Those who reported an *overnight stay* averaged spending \$300 per group, while average spending among those that mentioned participating in a *day trip* was only \$56 per group. Visitors who mentioned purchasing group packages estimated an average cost of \$594 per package.

- Similar to the intercepted trail users, visitors report that they/their group spent money on *beverages* or *restaurants* most often; but this was followed closely by a majority that also reported purchasing *candy/snacks*.
- Average per person/per group spending was highest for *transportation*, *daily equipment rentals*, and *restaurants*.

See chart on the following page.

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Reported Spending of Visitors that Inquired Online

	Online Inquiry: Visitors Spending			
	Personal		Group	
	% Purchasing	Mean	% Purchasing	Mean
Bases:	175		150	
Total (excluding package & lodging costs)	81%	\$116	19%	\$197
Bases: Specific Items/Services	175	20*-152	150	11*115
-Beverages	83%	\$12	71%	\$25
-Clothing	19%	\$30	21%	\$39
-Candy/Snacks	61%	\$10	57%	\$16
-Daily Equipment Rental (bikes, etc.)	11%	\$67	7%	\$76
-Ice Cream	38%	\$7	38%	\$11
-Restaurants	87%	\$59	77%	\$130
-Souvenirs	29%	\$18	26%	\$28
-Transportation (shuttling, taxi, etc.)	21%	\$106	16%	\$232
-Other (sunscreen, film, etc.)	23%	\$30	23%	\$33
Individual/Group Package Costs	13%	\$147	15%	\$594

***Caution: small base sizes**

Online inquiry visitors who mentioned at least one overnight stay in conjunction with their trip estimated spending an average of \$82 a night on accommodations. Similar to the trail users that were interviewed along the trail, differences were observed between types of accommodations in regards to nightly charges; those staying at bed & breakfasts averaged a fee of \$98 per evening, nightly campground fees averaged \$37, and respondents that stayed in a motel/hotel/hostel, on average, paid \$108 per night.

Practically all of the online inquiry visitors rated their overall experience on the trail as either *very good* or *excellent* and similar to the intercepted trail users, they suggested *additional signage* both on and around the trail so that trail users can be better informed about the trail towns and also so trailheads are easier to find.

Online Inquiry: Non-Visitors

Respondents who stated that they had not visited the trail where asked to provide reasons why they decided not to visit after their online inquiry. The

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most frequently mentioned reason, cited nearly seven times more often than any other response, was that they simply *did not have time*. However, nearly all of the non-visitors stated that they were either *somewhat* or *extremely likely* to visit the trail in the future.

When asked if they still visited other destinations in the Southwestern PA/Northern MD region this season, over half of the non-visitors stated that they had. Similar to the visitors, the vast majority identified *attractions* such as *Fallingwater*, *C&O Canal Towpath*, and/or *Ohiopyle*. Those who reported that they had not visited the Southwestern PA/Northern MD regions this summer stated that they instead traveled to another state or to the mountains.

Online inquiry non-visitors, having chosen not to visit the trail, were asked to answer questions regarding any alternative activities/visits they may have participated in over the summer.

Similar to the trail visitors, the vast majority of the respondents reported having at least one other person in their group the day that they participated in an alternative activity/visited another location.

Three-quarters of the respondents mentioned that they/their group made purchases in the communities they visited. Excluding any individual package costs, non-visitors estimated that they spent an average of \$211 per person. Those purchasing individual packages estimated spending an average of \$199 per package. Respondents who were admittedly part of a group estimated average expenditures, excluding group package costs, of \$257 per group. Individuals/group members who purchased a group package estimated spending an average of \$623 per group package.

- Similar to trail visitors, non-visitors mentioned that they/their group made purchases on *beverages*, *candy/snacks*, or *restaurants* most often
- Average per person/per group spending was highest for *daily equipment rentals* and *restaurants*.

See chart on the following page.

Executive Summary

Reported Spending of Non-Visitors that Inquired Online

	Online Inquiry: Non-Visitors Spending			
	Personal		Group	
	% Purchasing	Mean	% Purchasing	Mean
Bases:	56		50	
Total (excluding package & lodging costs)	76%	\$142	24%	\$179
Bases: Specific Items/Services	56	5*-47	50	4*-34
-Beverages	84%	\$19	68%	\$58
-Clothing	29%	\$45	20%	\$86
-Candy/Snacks	55%	\$10	56%	\$19
-Daily Equipment Rental (bikes, etc.)	23%	\$113	14%	\$109
-Ice Cream	36%	\$10	30%	\$18
-Restaurants	80%	\$66	56%	\$113
-Souvenirs	34%	\$36	30%	\$41
-Transportation (shuttling, taxi, etc.)	9%	\$36	8%	\$104
-Other (sunscreen, film, etc.)	38%	\$22	28%	\$39
Individual/Group Package Costs	29%	\$199	30%	\$623

***Caution: small base sizes**

A large proportion of non-visitors indicated that they did have an overnight stay in conjunction with their trip and most frequently reported staying in a *hotel/motel/hostel*, followed by one-third that mentioned spending the night at a *campground*, approximately one in eight the mentioned spending the night in a *cabin/lodge/condo* and less than one in ten reported staying at a *bed and breakfast*. Non-visitors estimated that they spent on average of \$100 per night on accommodations. However, as was observed among both of the trail users samples, average costs associated with each of the accommodations differed. Those staying in a motel/hotel/hostel paid an average of \$103 each evening, campground fees, per night, averaged \$32, and fees reported for a nightly stay at a cabin/lodge/condo were upwards of \$244 per night.

Nearly nine in ten online inquiry non-visitors reported that their experience participating in an alternative activity to the trail was *very good* or *excellent*.

Conclusions and Recommendations

It must be noted that differences in methodologies and data reporting made comparisons between the 2008 results and the previous studies difficult, if not impossible, in some cases. Thus, we didn't note trends where we felt the reliability of the comparisons would be suspect. Furthermore, projections/estimations of the 2008 trail users' spending were not performed because trail counter data was not available. However, we feel the Phase III report, to be conducted in early 2009, will provide reliable economic impact data if business cooperation is high.

The following trail user profile was observed in the 2008 Study.

- When it came to gaining awareness of the trail, regardless of where visitors lived or the distance they traveled, the most frequently mentioned method was through family and friends. Furthermore, outside of family/friends/bike store owners, visitors most frequently mentioned learning of the trail from the internet.
 - We recommend that all organizations/businesses that are located along and/or promote the trail maintain or enhance their web site content, key word search, user-friendliness, etc.—especially since nearly one-third of the online inquirers that visited the trail learned of it through the internet.
- Trail users were considerably more likely to be biking either by themselves or with friends for recreational purposes and nearly all visitors provided extremely positive ratings in regards to the experience on the trail.
- Similar to previous years, the majority of the trail users resided in Southwestern PA within relatively close proximity to the trail. However, despite being difficult to quantify, a substantial increase was observed in the number of 2008 trail users living outside of this area and in the average distance traveled one-way by trail users to their starting location. 2008 trail users were also significantly more likely to plan/participate in multiple day trips and report/plan overnight stays in conjunction to their trip.

On average, trail users spent \$54 per person and the most common spending categories were restaurants, beverages, and lodging.

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- As was observed in 2002, differences in spending habits were closely tied to the aforementioned trends. Trail users that reported overnight stays were significantly more likely than local visitors to reporting spending and in addition, they averaged spending more per person (\$98 vs. \$13, respectively). Verifying the fact that these visitors are not only making a significant contribution to the economic development of the trail towns through nightly accommodations fees, but also by more frequently purchasing the basic items associated with travel on the trail such as beverages, restaurants, snacks, ice cream, and souvenirs.
 - Therefore, Campos Inc recommends that tourism entities and businesses should concentrate their marketing efforts in the larger metropolitan areas in the Mid-Atlantic Region. After mapping the home zip codes of trail users, the targeting of three regions in particular is recommended: The Keystone Corridor (the area between Harrisburg, PA and Philadelphia, PA); Cleveland, OH; and Baltimore, MD/Washington DC.
 - Since the vast majority of the trail users reported that they were biking, It is recommended that tourism entities' and trail businesses' marketing efforts target bike/recreation shops/stores and bike/recreational groups/organizations. Attracting visitors from these stores/organizations to the trail through package deals or discounts will likely increase the number of trail promoters and ultimately spread awareness through family and friends.

The most frequently mentioned recommendation/suggestion from trail users for both the trail and the trail communities was the improvement of trail signage.

- On the trail, the resounding desire from trail users was for trail signage to more closely resemble that of an “interstate highway.” They wish to see markers at each of the trailheads indicating what items/services/amenities are available at each stop posted directly next to a map of the town.
- In the communities, trail users would like to see signs that better identify the location of trailheads (i.e., directional signs pointing towards the trails heads and improvement of signs identifying the destinations).
 - Campos Inc recommends the creation/posting of signs in the trail communities directing visitors to trailheads if they do not already exist. If these signs do exist it is recommended that they are re-evaluated to ensure their effectiveness.

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- We also highly recommend the installation of “Trail Guides/Maps” at each trailhead similar to what is available online, if they do not already exist. These “Trail Guides” should be modifiable and should include not only information about the town’s history, attractions, and available amenities, but also a map of the town and the distance in each direction to adjacent trailheads/towns. If these “Trail Guides/Maps” already exist it is recommended that they be re-evaluated to ensure their effectiveness and accessibility.

Finally, Campos Inc recommends that future Trail User studies primarily focus on discovering visitors’ usage patterns, satisfaction, and demographic profiles. This will allow the survey instrument to be substantially shorter, which in turn should increase trail user’s cooperation rates and also decrease volunteer “burn-out.” With calculations based solely on trail user’s estimated spending and un-reliable trail counters, it is impossible for projections to be consistent from year to year and it is unlikely that they will ever be extremely accurate.

- The economic projections should instead be calculated by data collected among local trail businesses, as their estimations are based on sales/revenue records and not based on memory or planned, not actual, spending. Thus, it is extremely important to increase the number of businesses participating in the Phase III–Economic Impact Study, scheduled for 2009.
- In conclusion, the 2008 Trail Users Study (Phase II) was extremely effective in detailing and updating our understanding of visitors’ trail usage patterns, points of origin, and source of awareness. We recommend that this study be repeated every 2 or 3 years to identify changes over time.

The Progress Fund can use this (Phase II) data to show that the trail is bringing in tourism from outside of PA. The Phase III, economic impact data, can be used to communicate the importance of acquiring funding sources for the trail. For instance, funding may be needed in order to create/produce directional signage and/or Trail Guides/Maps as trail communities/businesses may not be able to support this promotion in the early stages of trail community development.



Detailed Findings

Detailed Findings

Question 1. Where did you start on the trail?

Starting Location

	Location of Interview								
	Total	Con- fluence	Conne- llsville	Cum- berland	Frost- burg	Meyer- sdale	Ohio- pyle	Rock- wood	West Newton
Bases:	1272	18*	127	22*	290	70	307	207	231
Frostburg/ Big Savage Tunnel	13.1%	11.1%	0.0%	4.5%	51.4%	8.6%	0.3%	3.4%	0.0%
Ohiopyle	12.8%	11.1%	2.4%	0.0%	3.1%	1.4%	45.9%	2.9%	0.4%
Connellsville	10.1%	0.0%	55.9%	0.0%	0.0%	0.0%	18.2%	0.0%	0.9%
Rockwood	9.1%	0.0%	0.0%	4.5%	2.4%	8.6%	1.3%	47.3%	0.0%
West Newton/ Cedar Creek	8.9%	0.0%	4.7%	0.0%	1.7%	1.4%	2.0%	2.4%	39.0%
Boston	8.3%	0.0%	5.5%	4.5%	0.0%	1.4%	5.2%	5.3%	29.9%
Cumberland	6.6%	11.1%	2.4%	36.4%	15.5%	7.1%	1.6%	3.9%	3.5%
Confluence	5.7%	38.9%	0.8%	0.0%	3.1%	2.9%	11.4%	9.2%	0.0%
McKeesport	4.6%	5.6%	5.5%	4.5%	0.0%	7.1%	5.9%	3.4%	8.2%
Meyersdale	4.5%	0.0%	0.8%	9.1%	8.6%	24.3%	1.0%	4.3%	0.0%
Pittsburgh	3.7%	5.6%	3.1%	4.5%	6.2%	8.6%	2.0%	5.3%	0.0%
Washington DC	3.6%	0.0%	2.4%	9.1%	4.5%	12.9%	3.3%	4.3%	0.0%

*Caution: small base sizes

Findings

The most frequently cited starting locations, by at least one in ten trail users, were *Frostburg/Big Savage Tunnel*, *Ohiopyle*, and *Connellsville* (13.1%, 12.8%, and 10.1%; respectively).

- This was followed closely by *Rockwood*, *West Newton/Cedar Creek*, and *Boston* (9.1%, 8.9%, and 8.3%, respectively).
- The largest proportions of respondents were interviewed coming off the trail in the same trail town that they reported as their starting location.

Q1. continued →

Detailed Findings

- Among towns that were not utilized for interviewing, two notable trends were observed:
 - Those that reported starting on the trail in *Boston* were significantly more likely to have been interviewed in West Newton/Cedar Creek.
 - Those that reported starting on the trail in *Washington DC* were significantly more likely to have been interviewed in Meyersdale.

Subgroup Differences

- Respondents that reported starting on the trail in *Cumberland* were significantly more likely to report typically using the trail in either *summer* and/or *fall*.
- Respondents that started on the trail in *Boston, McKeesport, Pittsburgh,* or *Washington DC* were significantly more likely to report an overnight stay in conjunction with their trip.
- Conversely, respondents that reported starting on the trail in *Frostburg/Big Savage Tunnel, Connellsville, Rockwood, or West Newton/Cedar Creek* were significantly less likely to plan an overnight stay in conjunction with their trip.

Detailed Findings

Question 2. Will you be/have you been on the trail for successive days?

Successive Days on Trail

Note:

Question 2 was asked of all respondents.

	Location of Interview								
	Total	Con-fluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohio-pyle	Rock-wood	West Newton
Bases:	1272	18*	127	22*	290	70	307	207	231
Yes	34.1%	38.9%	31.5%	40.9%	24.1%	58.6%	34.9%	42.0%	31.6%
No	65.9%	61.1%	68.5%	59.1%	75.9%	41.4%	65.1%	58.0%	68.4%

*Caution: small base sizes

Findings

Slightly more than one-third (34.1%) of the respondents reported that they either *have been* on the trail for successive days or *planned to be*.

- Respondents that were interviewed in Meyersdale were significantly more likely than those interviewed in any of the other towns to report successive days on the trail.

Subgroup Differences

- No significant differences were observed by subgroup.

Detailed Findings

Question 2a. How many days have you been/do you plan to remain on the trail?

Days on the Trail

	Location of Interview								
	Total	Con-fluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohiop-yle	Rock-wood	West Newton
Bases:	434	7*	40*	9*	70	41*	107	87	73
Two	30.6%	14.3%	35.0%	22.2%	17.1%	41.5%	32.7%	29.9%	35.6%
Three	24.2%	42.9%	22.5%	0.0%	30.0%	17.1%	21.5%	19.5%	34.2%
Four	10.4%	0.0%	7.5%	33.3%	10.0%	4.9%	9.3%	11.5%	13.7%
Five	11.3%	0.0%	5.0%	11.1%	17.1%	7.3%	9.3%	18.4%	6.8%
More than five	23.5%	42.9%	20.0%	33.3%	12.9%	4.9%	3.7%	6.9%	1.4%
Mean	4.4	4.6	4.7	4.7	4.8	3.9	4.2	4.3	4.2

*Caution: small base sizes

Findings

Over half of the respondents that reported they had been/planned to be on the trail for successive days mentioned being on the trail for either *two* (30.6%) or *three* (24.2%) days.

- Nearly one-quarter (23.5%) cited being on the trail *more than five* days.
- Respondents interviewed in Conne-llsville, Meyersdale, Ohiopyle, Rockwood, or West Newton/Cedar Creek were more likely to have reported *two* days compared to the other trail towns.
- Those interviewed in Confluence, Conne-llsville, Frostburg/Big Savage Tunnel, Meyersdale, Ohiopyle, or Rockwood were more likely to have cited *more than five* days compared to the other trail towns.
- Respondents interviewed in either Rockwood or Frostburg/Big Savage Tunnel were more likely to have mentioned *five* days compared to the other trail towns.

Subgroup Differences

- No significant differences were observed by subgroup.

Note:

Question 2a was asked of all respondents that reported being on the trail for successive days.

Detailed Findings

Question 3. What form of transportation did you use to get to the trail today?

Transportation Used to the Trail

Note:

Question 3 was asked of all respondents.

	Location of Interview								
	Total	Con-fluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohiop-yle	Rock-wood	West Newton
Bases:	1272	18*	127	22*	290	70	307	207	231
Car/truck/van (personal)	64.5%	72.2%	76.4%	50.0%	40.0%	47.1%	69.4%	72.9%	81.0%
Bike	20.6%	11.1%	17.3%	36.4%	24.8%	40.0%	21.5%	18.8%	10.8%
Car/truck/van (friend)	5.8%	5.6%	3.1%	4.5%	13.4%	1.4%	5.9%	1.0%	3.5%
Walked	3.8%	5.6%	1.6%	4.5%	11.4%	5.7%	0.7%	1.0%	1.3%
Private shuttle service	2.8%	0.0%	0.0%	0.0%	8.6%	2.9%	0.7%	1.4%	1.3%

***Caution: small base sizes**

Findings

The majority of the respondents reported traveling to the trail in either their own *personal car/truck/van* (64.5%) or their *friend's car/truck/van* (5.8%).

- One in five (20.6%) stated that they rode a *bike* to the trail.
- Respondents were significantly more likely to mention traveling to the trail in a *personal car/truck/van* if they were interviewed in Confluence, Connellsville, Ohiopyle, Rockwood, or West Newton/Cedar Creek compared to the other trail towns.
- Respondents were significantly more likely to report traveling to the trail by *bike* if they were interviewed in either Cumberland or Meyersdale compared to the other trail towns.
- Those interviewed at Frostburg/Big Savage Tunnel were significantly more likely to report three of the methods of transportation, *friend's car/truck/van*, *walk*, and *private shuttle service*, compared to those in other trail towns.

Q3. continued →

Detailed Findings

Subgroup Differences

- Respondents were significantly more likely to report an overnight stay if they drove to the trail in a *personal car/truck/van* or if they *walked*.
- Respondents were significantly less likely to report an overnight stay if they rode their *bike* to the trail or utilized a *private shuttle service*.

Detailed Findings

Question 4. Where are you ending on the trail?

Ending Location

Note:

Question 4 was asked of all respondents.

	Location of Interview								
	Total	Con-fluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohio-pyle	Rock-wood	West Newton
Bases:	1272	18*	127	22*	290	70	307	207	231
Ohiopyle	14.9%	5.6%	18.1%	0.0%	2.4%	2.9%	47.9%	4.3%	0.4%
Cumberland	12.7%	5.6%	3.9%	54.5%	26.6%	8.6%	4.2%	5.8%	15.6%
Frostburg/ Big Savage Tunnel	12.4%	0.0%	0.0%	4.5%	50.0%	8.6%	0.7%	1.9%	0.0%
Washington DC	8.1%	16.7%	7.1%	13.6%	7.6%	12.9%	9.4%	13.5%	0.0%
Rockwood	7.9%	0.0%	0.0%	0.0%	0.3%	5.7%	0.7%	45.4%	0.0%
Connellsville	7.6%	0.0%	35.4%	0.0%	0.0%	0.0%	16.0%	0.5%	0.9%
West Newton/ Cedar Creek	7.2%	5.6%	0.8%	0.0%	0.0%	0.0%	1.0%	0.0%	37.2%
Confluence	5.8%	50.0%	7.1%	0.0%	0.0%	2.9%	11.1%	8.7%	0.9%
Boston	5.4%	0.0%	2.4%	0.0%	0.7%	4.3%	1.6%	2.4%	22.1%
Meyersdale	3.5%	0.0%	0.0%	0.0%	3.4%	25.7%	2.0%	5.3%	0.0%
McKeesport	2.4%	0.0%	3.9%	0.0%	0.0%	7.1%	2.0%	2.4%	3.9%
Pittsburgh	2.2%	5.6%	1.6%	9.1%	3.4%	7.1%	1.0%	2.4%	0.0%

**Caution: small base sizes*

Findings

The most frequently cited ending locations, by at least one in eight trail users, were *Ohiopyle*, *Cumberland*, and *Frostburg/Big Savage Tunnel* (14.9%, 12.7%, and 12.4%, respectively).

- The group of locations that were mentioned second most often included *Washington DC*, *Rockwood*, *Connellsville*, and *West Newton/Cedar Creek* (8.1%, 7.9%, 7.6%, and 7.2%, respectively).

Q4. continued →

Detailed Findings

- Similar to the trend observed with the starting locations (Q1), the largest proportions of the respondents were interviewed while exiting the trail at their final destination.
 - Those interviewed at Connellsville were significantly more likely than those interviewed in other trail towns, excluding Ohiopyle, to cite *Ohiopyle* as their final destination.
 - Respondents interviewed at Frostburg/Big Savage Tunnel were significantly more likely than those interviewed in other trail towns, excluding Cumberland, to mention that their final destination was *Cumberland*.
- Among towns that were not utilized for interviewing, the only trend observed was that respondents interviewed in West Newton/Cedar Creek were significantly more likely than those in other towns to report *Boston* as their final destination.

Subgroup Differences

- Respondents that cited *Cumberland*, *Washington DC*, *McKeesport*, or *Pittsburgh* as their ending location were significantly more likely to report an overnight stay.
- Those that mentioned *Frostburg/Big Savage Tunnel*, *Rockwood*, *Connellsville*, or *West Newton/Cedar Creek* as their ending location were significantly less likely to report an overnight stay.

Detailed Findings

Question 5. How far did you travel, ONE-WAY, to come to the trail?

Distance Traveled to the Trail

Note:

Question 5 was asked of all respondents.

	Location of Interview								
	Total	Con- fluence	Conne- llsville	Cum- berland	Frost- burg	Meyer- sdale	Ohio- pyle	Rock- wood	West Newton
Bases:	1272	18*	127	22*	290	70	307	207	231
Less than 5 miles	20.4%	5.6%	22.0%	22.7%	41.0%	18.6%	6.2%	10.6%	22.9%
5-25 miles	35.7%	16.7%	31.5%	18.2%	47.6%	10.0%	24.4%	31.4%	52.8%
26-50 miles	13.2%	22.2%	22.0%	9.1%	6.2%	7.1%	19.2%	17.9%	6.5%
50 miles or more	29.6%	55.6%	23.6%	50.0%	4.8%	48.6%	50.2%	39.6%	17.7%
Median	20.0	65.0	25.0	50.0	5.0	75.0	54.0	35.0	12.0
Mean	131.0	115.3	140.7	87.0	38.1	151.4	178.8	171.9	142.2

*Caution: small base sizes

Findings

More than half of the respondents reported a one-way traveling distance of either *less than 5 miles* (20.4%) or *5-25 miles* (35.7%).

- Most (29.6%) of the remaining respondents mentioned the complete opposite, a one-way traveling distance of *50 miles or more*.
- Those interviewed at either Frostburg/Big Savage Tunnel or West Newton/Cedar Creek were significantly more likely to mention *less than 25 miles* compared to those in other towns.
- Respondents interviewed in Connellsville, Ohio-pyle, or Rockwood were significantly more likely to have cited *26-50 miles* compared to those in other towns.
- Finally, those interviewed in Confluence, Cumberland, Meyersdale, Ohio-pyle, or Rockwood were significantly more likely than those in other towns to report *more than 50 miles*.

Subgroup Differences

- Not surprisingly, respondents that cited a one-way traveling distance of *more than 50 miles* were significantly more likely to have reported an overnight stay, while those citing distances of *less than 50 miles* were significantly less likely to mention an overnight stay.

Q5. continued →

Detailed Findings

- Those that reported a distance of *less than 5 miles* were significantly more likely to report typically using the trail in *winter*.

Detailed Findings

Question 6. How often, on average, do you use the trail?

Frequency of Use

	Location of Interview								
	Total	Con-fluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohio-pyle	Rock-wood	West Newton
Bases:	1272	18*	127	22*	290	70	307	207	231
Once a week or more	25.9%	5.6%	29.9%	31.8%	25.2%	21.4%	13.7%	27.5%	42.0%
Several times a month	18.7%	11.1%	25.2%	18.2%	26.9%	12.9%	11.1%	14.0%	21.6%
Several times a year	23.0%	16.7%	22.0%	13.6%	21.7%	15.7%	32.6%	20.8%	17.7%
Once a year	10.1%	22.2%	10.2%	9.1%	4.8%	14.3%	17.9%	11.6%	3.0%
This is my first time	22.2%	44.4%	12.6%	27.3%	21.4%	35.7%	24.8%	26.1%	15.6%

*Caution: small base sizes

Findings

The frequency at which respondents reported using the trail was well distributed; a difference of only 15% was observed between the most frequently selected response and the least.

- The majority of the respondents reported visiting the trail at least *several times a year* (23.0%), with nearly one in five (18.7%) selecting *several times a month* and one-quarter (25.9%) reporting *once a week or more*.
- Slightly more than one in five (22.2%) stated that *this is my first time*; followed by one in ten (10.1%) that only visit the trail *once a year*.
- Those interviewed in West Newton/Cedar Creek were significantly more likely than those in other towns to visit *once a week or more*.
- Respondents were significantly more likely to mention *several times a month* if they were interviewed in Connellsville, Frostburg/Big Savage Tunnel, or West Newton/Cedar Creek compared to other towns.
- Those interviewed in Ohio-pyle were significantly more likely to cite *several times a year* than were those in the other towns.

Q6. continued →

Detailed Findings

- Finally, respondents were significantly more likely to report *this is my first time* if they were interviewed in Connellsville, or Meyersdale compared to other towns.

Subgroup Differences

- Respondents that reported visiting the trail *once a week or more* were significantly more likely to:
 - typically use the trail in *summer* or *winter*, especially *winter*
 - have not reported an overnight stay
- Those that mentioned *several times a year* were also significantly less likely to report an overnight stay.
- Respondents were significantly less likely to typically use the trail in *winter* if they reported using the trail *several times a year*.
- Respondents that mentioned visiting the trail *once a year* were significantly more likely to:
 - typically use the trail in the *summer*
 - have reported an overnight stay
- Those who stated that *this is my first time* were significantly more likely to have mentioned an overnight stay.

Detailed Findings

Question 6a. What days of the week do you typically visit the trail?

Typical Days of Trail Visits

	Location of Interview								
	Total	Con-fluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohio-pyle	Rock-wood	West Newton
Bases:	989	10*	111	16*	228	45*	231	153	195
Monday-Thursday	55.7%	30.0%	56.8%	50.0%	52.6%	71.1%	46.3%	56.9%	67.2%
Friday	48.1%	40.0%	35.1%	37.5%	68.4%	57.8%	34.2%	43.8%	50.8%
Saturday	70.1%	80.0%	80.2%	75.0%	72.4%	64.4%	63.6%	68.6%	70.8%
Sunday	63.9%	80.0%	62.2%	68.8%	69.7%	57.8%	58.4%	68.6%	61.0%

*Caution: small base sizes

Findings

When asked to name the days of the week that they typically visit the trail, respondents cited the weekend, *Saturday* (70.1%) and *Sunday* (63.9%), most often.

- However, *Monday-Thursday* and *Friday*, were also mentioned by a large proportion of the respondents (48.1% and 55.7%, respectively)
- Those interviewed in either Meyersdale or West Newton/Cedar Creek were significantly more likely to report typically visiting the trail *Monday-Thursday* compared to those interviewed in the other towns.
- Respondents that named *Friday* were:
 - significantly more likely to have been interviewed at Frostburg/Big Savage Tunnel than in the other towns
 - somewhat more likely to have been interviewed in either Meyersdale or West Newton/Cedar Creek compared to the other towns

Subgroup Differences

- Those that cited *Monday-Thursday* were significantly more likely to:
 - typically use the trail in the *winter*
 - have not reported an overnight stay
- It was significantly more likely for respondents that mentioned either *Saturday* and/or *Sunday* to have reported an overnight stay.

Note:

Question 6a was asked of all respondents that reported visiting the trail at least one time prior to the day of the interview.

Detailed Findings

Question 6b. What time(s) of year do you typically visit the trail?

Typical Season of Trail Visits

	Location of Interview								
	Total	Con-fluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohio-pyle	Rock-wood	West Newton
Bases:	989	10*	111	16*	228	45*	231	153	195
Spring	61.4%	50.0%	73.0%	56.2%	40.4%	62.2%	52.8%	72.5%	81.5%
Summer	87.6%	100.0%	91.9%	68.8%	82.5%	93.3%	84.8%	89.5%	92.3%
Fall	75.1%	80.0%	82.9%	56.2%	74.1%	71.1%	64.5%	80.4%	82.6%
Winter	10.3%	10.0%	13.5%	0.0%	5.7%	13.3%	9.5%	11.1%	14.4%
Don't know/ No pattern	3.5%	0.0%	3.6%	12.5%	8.8%	2.2%	2.2%	0.7%	1.0%

***Caution: small base sizes**

Findings

The vast majority (87.6%) of the respondents stated that they typically use the trail during the *summer*.

- This was followed closely by 75.1% that cited *fall* and 61.4% who named *spring*.
- Only one in ten (10.3%) reported that they typically use the trail in the *winter* and very few (3.5%) *didn't know/didn't have a pattern*.
- Respondents interviewed in West Newton/Cedar Creek were significantly more likely to have name *spring* compared to those interviewed in the other towns.
 - Those interviewed at Frostburg/Big Savage Tunnel were significantly less likely to have mentioned *spring* than the other towns.
- Despite being mentioned very frequently by all respondents, *summer* was cited slightly more often by those interviewed in Confluence, Connellsville, Meyersdale, Rockwood, or West Newton/Cedar Creek compared to those interviewed in the other towns.

Q6b. continued →

Detailed Findings

- Those interviewed in either Connellsville or West Newton/Cedar Creek were significantly more likely to have selected *fall* than those interviewed in Cumberland, Frostburg/Big Savage Tunnel, or Ohiopyle.

Subgroup Differences

- No significant differences were observed by subgroup.

Detailed Findings

Question 7. What is the gender of respondent?

Gender of Respondent

Note:

Question 7 was recorded by interviewer's observation for all respondents.

	Total	Location of Interview							
		Con-fluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohio-pyle	Rock-wood	West Newton
Bases:	1272	18*	127	22*	290	70	307	207	231
Male	65.1%	61.1%	67.7%	63.6%	58.6%	67.1%	66.8%	72.0%	63.2%
Female	34.9%	38.9%	32.3%	36.4%	41.4%	32.9%	33.2%	28.0%	36.8%

*Caution: small base sizes

Findings

The majority of the respondents interviewed were *male* (65.1%).

Subgroup Differences

- *Male* respondents were significantly more likely to have reported an overnight stay.

Detailed Findings

Question 8. Which of the following best identifies your age group?

Age of Respondent

Note:

Question 8 was asked of all respondents.

	Location of Interview								
	Total	Con- fluence	Conne- llsville	Cum- berland	Frost- burg	Meyer- sdale	Ohio- pyle	Rock- wood	West Newton
Bases:	1272	18*	127	22*	290	70	307	207	231
16-24	6.0%	11.1%	3.1%	13.6%	13.4%	5.7%	4.2%	2.4%	2.6%
25-34	10.9%	0.0%	9.4%	13.6%	20.0%	4.3%	6.2%	8.2%	11.7%
35-44	16.1%	33.3%	19.7%	36.4%	21.7%	14.3%	14.0%	11.6%	11.3%
45-54	28.0%	22.2%	24.4%	22.7%	25.2%	27.1%	31.6%	31.9%	26.4%
55-64	25.1%	27.8%	25.2%	4.5%	10.0%	35.7%	31.6%	30.0%	29.4%
65+	13.9%	5.6%	18.1%	9.1%	9.7%	12.9%	12.4%	15.9%	18.6%

*Caution: small base sizes

Findings

The majority of the respondents that were interviewed reported being 35 years of age or older (16.1%–35-44, 28.0%–45-54, 25.1%–55-64, 13.9%–65+).

- One in ten (10.9%) were 25-34 years of age.
- Only 6% were 16-24 years of age.
- It was significantly more likely for respondents 16-34 years of age to have been interviewed at Frostburg/Big Savage Tunnel than any of the other towns.
- Respondents 35-44 years of age were more likely to have been interviewed in Confluence, Connellsville, Cumberland, or Frostburg/Big Savage Tunnel than the other towns.
- Those 55-64 years of age were significantly less likely to have been interviewed in either Cumberland or Frostburg/Big Savage Tunnel than any of the other towns.

Subgroup Differences

- Respondents 25-34 or 65+ years of age were each significantly less likely to have reported an overnight stay.

Q8. continued →

Detailed Findings

- Those 45-54 years of age were significantly more likely to have reported an overnight stay.
- Respondents 35-44 years of age were significantly less likely to report typically using the trail in the *winter*.

Detailed Findings

Question 9. What is your zip/postal code?

Zip/Postal Code

	Location of Interview								
	Total	Con-fluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohio-pyle	Rock-wood	West Newton
Bases:	1272	18*	127	22*	290	70	307	207	231
(Net) Pennsylvania	57.5%	44.4%	83.5%	13.6%	15.9%	47.1%	65.5%	67.6%	84.0%
-Southwestern, PA	51.7%	27.8%	76.4%	4.5%	14.1%	40.0%	56.4%	61.4%	80.1%
-Southeastern, PA/ Keystone Corridor	3.1%	11.1%	0.8%	4.5%	1.4%	0.0%	5.9%	3.9%	2.2%
(Net) Other	40.2%	33.3%	15.0%	86.4%	81.0%	45.7%	34.5%	30.9%	13.0%
-Cumberland, MD	18.1%	0.0%	0.0%	45.5%	70.3%	5.7%	20.0%	2.9%	0.0%
-Washington DC/ Baltimore, MD	6.6%	16.7%	5.5%	18.2%	4.8%	14.3%	9.8%	6.3%	1.3%
-Cleveland, OH	2.4%	0.0%	3.1%	0.0%	0.3%	2.9%	3.6%	3.9%	1.7%

*Caution: small base sizes

Findings

Over half (57.5%) of the respondents that were interviewed reported living in Pennsylvania, driven nearly entirely by visitors living in southwestern, PA (51.7%).

- Trail users living outside of PA were most likely to have reported living around Cumberland, MD (18.1%).
- Those living in southwestern, PA were significantly more likely to have been interviewed in West Newton/Cedar Creek, Connellsville, Rockwood, or Ohiopyle compared to other towns.
- Respondents living in Cumberland, PA were significantly more likely to have been interviewed in Frostburg/Big Savage Tunnel or Cumberland than another town.

Subgroup Differences

- Trail users living in southwestern, PA were significantly more likely to:
 - have reported typical use in *spring* and *winter*
 - have not reported an overnight stay

Q9. continued →

Detailed Findings

- Trail users living in *Cumberland, MD* were significantly more likely to:
 - have reported typical use in *summer* and *fall*
 - have not reported an overnight stay

Detailed Findings

Question 10. How many persons were in your group today?

Group Size

Note:

Question 10 was asked of all respondents.

	Location of Interview								
	Total	Con-fluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohio-pyle	Rock-wood	West Newton
Bases:	1272	18*	127	22*	290	70	307	207	231
Just myself	31.5%	22.2%	30.7%	9.1%	42.4%	24.3%	17.9%	28.5%	44.2%
2	42.4%	50.0%	48.8%	59.1%	35.2%	40.0%	46.3%	48.3%	36.4%
3-10	23.4%	22.2%	17.3%	31.8%	21.4%	31.4%	32.2%	19.3%	18.2%
More than 10	2.5%	5.6%	3.1%	0.0%	1.4%	4.3%	2.9%	3.9%	1.3%
No answer	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%

*Caution: small base sizes

Findings

On the day they were interviewed, the majority of the respondents reported using the trail with at least one other person and the most frequently reported group size was two (42.4%).

- Slightly more than one in three (31.5%) stated that it was *just myself* using the trail.
- About one-quarter (23.4%) were with groups of 3-10 other people.
- Very few (2.5%) were using the trail with a group size of *more than 10*.
- Respondents were significantly more likely to have reported *just myself* if they were interviewed at either Frostburg/Big Savage Tunnel or West Newton/Cedar Creek compared to other towns.
- Those who reported groups ranging from 3-10 were significantly more likely to have been interviewed in Cumberland, Meyersdale, or Ohio-pyle than the other towns.

Subgroup Differences

- Respondents stating *just myself* using the trail were significantly less likely to have reported an overnight stay.
- Those reporting group sizes of 3 or more were significantly more likely to have reported an overnight stay.

Detailed Findings

Question 11. What type of group are you traveling with?

Group Composition

	Location of Interview								
	Total	Con- fluence	Conne- llsville	Cum- berland	Frost- burg	Meyer- sdale	Ohio- pyle	Rock- wood	West Newton
Bases:	871	14*	88	20*	167	53	252	148	129
Personal group of friends/family	89.8%	92.9%	93.2%	90.0%	81.4%	83.0%	90.1%	95.3%	93.8%
Package trip (private)	3.6%	0.0%	0.0%	0.0%	14.4%	5.7%	0.4%	0.7%	1.6%
Package trip (commercial)	1.6%	0.0%	1.1%	10.0%	3.6%	0.0%	1.6%	0.0%	0.8%
Fundraising trip	1.3%	0.0%	2.3%	0.0%	0.0%	1.9%	1.2%	0.7%	3.1%

**Caution: small base sizes*

Findings

Among the respondents using the trail with at least one other person, the vast majority (89.8%) reported being part of a *personal group of friends/family*.

- It was significantly more likely for respondents who were part of a *private package trip* to have been interviewed at Frostburg/Big Savage Tunnel compared to any of the other towns.

Subgroup Differences

- Respondents using the trail with a *personal group of friends/family* were significantly less likely to report an overnight stay.

Note:

Question 11 was asked of all respondents who reported traveling with at least one other person.

Detailed Findings

Question 12a. How many persons in your group are in the following age categories?

Age of Group Members

Note:

Question 12a was asked of all respondents who reported traveling with at least one other person.

	Location of Interview								
	Total	Con-fluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohio-pyle	Rock-wood	West Newton
Bases:	871	14*	88	20*	167	53	252	148	129
Under 10 years of age									
None	92.1%	92.9%	92.0%	90.0%	93.4%	81.1%	91.3%	94.6%	93.8%
One or more	7.9%	7.1%	8.0%	10.0%	6.6%	18.9%	8.7%	5.4%	6.2%
10-15 years of age									
None	90.9%	85.7%	93.2%	80.0%	96.4%	84.9%	87.3%	89.9%	95.3%
One or more	9.1%	14.3%	6.8%	20.0%	3.6%	15.1%	12.7%	10.1%	4.7%
16-24 years of age									
None	87.1%	78.6%	90.9%	70.0%	83.8%	84.9%	86.5%	87.8%	93.8%
One or more	12.9%	21.4%	9.1%	30.0%	16.2%	15.1%	13.5%	12.2%	6.2%
25-34 years of age									
None	83.1%	85.7%	76.1%	40.0%	76.6%	84.9%	84.5%	88.5%	93.0%
One or more	16.9%	14.3%	23.9%	60.0%	23.4%	15.1%	15.5%	11.5%	7.0%
35-44 years of age									
None	76.7%	50.0%	80.7%	100.0%	64.1%	81.1%	75.0%	79.7%	87.6%
One or more	23.3%	50.0%	19.3%	0.0%	35.9%	18.9%	25.0%	20.3%	12.4%
45-54 years of age									
None	58.0%	64.3%	62.5%	60.0%	60.5%	60.4%	54.8%	52.7%	62.0%
One or more	42.0%	35.7%	37.5%	40.0%	39.5%	39.6%	45.2%	47.3%	38.0%
55-64 years of age									
None	66.2%	71.4%	64.8%	95.0%	83.2%	52.8%	58.7%	62.2%	65.1%
One or more	33.8%	28.6%	35.2%	5.0%	16.8%	47.2%	41.3%	37.8%	34.9%
65+ years of age									
None	84.0%	100.0%	80.7%	85.0%	89.8%	75.5%	84.5%	84.5%	79.1%
One or more	16.0%	0.0%	19.3%	15.0%	10.2%	24.5%	15.5%	15.5%	20.9%

*Caution: small base sizes

Q12a. continued →

Detailed Findings

Findings

Respondents were asked to report the ages of their fellow group members by providing a count for the number of individuals that fall into each of the age categories.

- The age category mentioned most often, by respondents for at least one of their group members, was *45-54 years of age* (42.0%).
- One-third (33.8%) of the respondents mentioned that a group member was *55-64 years of age*.
- About one-quarter (23.3%) stated that at least one of their group members were *35-44 years of age*.
- Respondents from groups with at least one member *under the age of 10* were significantly more likely to have been interviewed in Meyersdale compared to the other towns.
- Those using the trail with groups containing at least one member *10-15 years of age* were more likely to have been interviewed in Confluence, Cumberland, Meyersdale, Ohiopyle, or Rockwood than the other towns.
- It is somewhat less likely that a respondent who was accompanied by at least one person *16-24 years of age* would have been interviewed in West Newton/Cedar Creek compared to all of the other towns.
- Respondents using the trail with a group that had at least one member *25-34 years of age* were significantly more likely to have been interviewed in Connellsville, Cumberland, or Frostburg/Big Savage Tunnel than the other towns.
- Those accompanied by at least one person *35-44 years of age* were significantly more likely to have been interviewed in either Confluence or Frostburg/Big Savage Tunnel compared to the other towns.
- It was significantly less likely for a respondent using the trail with a group member *55-64 years of age* to have been interviewed in either Cumberland or Frostburg/Big Savage Tunnel compared to the other towns.

Q12a. continued →

Detailed Findings

Subgroup Differences

- Respondents using the trail with at least one group member aged *10-15* and/or *35-54* were significantly more likely to have reported an overnight stay.
- Those accompanied by group member *65+ years of age* were significantly less likely to report an overnight stay.

Detailed Findings

Question 12b. How many trips will each person in your group make to the trail this calendar year?

Number Visits to Trail this Year

Note:

Question 12b was asked of all respondents for both themselves and their group members, if applicable.

	Location of Interview								
	Total	Con-fluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohio-pyle	Rock-wood	West Newton
Bases:	1272	18*	127	22*	290	70	307	207	231
One time	29.6%	61.1%	22.0%	31.8%	23.4%	28.6%	43.0%	32.9%	18.2%
2-10 times	40.2%	22.2%	35.4%	31.8%	44.8%	25.7%	48.5%	42.5%	30.3%
More than 10 times	35.1%	0.0%	47.2%	40.9%	39.3%	18.6%	19.5%	34.3%	51.5%
Don't know/ No answer	3.9%	16.7%	3.9%	9.1%	0.7%	37.1%	0.0%	1.4%	3.5%

***Caution: small base sizes**

Findings

The majority of the respondents they and/or their fellow group members plan to make more than one trip to the trail this calendar year.

- Four in ten (40.2%) stated that they and/or someone in their group will make 2-10 trips.
- Slightly more than one third (35.1%) reported that they and/or another group member plan to make *more than 10* trips.
- Three in ten (29.6%) mentioned that this was their and/or one of their groups members *only* trip to the trail this year.
- Respondents that reported *one* trip for either themselves or one of their group members were significantly more likely to have been interviewed in either Confluence or Ohio-pyle than another town.
- Those who mentioned 2-10 trips for either themselves or another group member were significantly more likely to have been interviewed at Frostburg/Big Savage Tunnel, Ohio-pyle, or Rockwood compared to the other towns.

Q12b. continued →

Detailed Findings

- Respondents citing *more than 10* trip for either themselves or one of their group members were significantly more likely to have been interviewed in Connellsville, Cumberland, Frostburg/Big Savage Tunnel, Rockwood, or West Newton/Cedar Creek than the other towns.

Subgroup Differences

- It was significantly more likely for a respondent that was only visiting the trail *one time* to report an overnight stay.
- Respondents that reported *less than 10* trips to the trail were significantly more likely to report typically using the trail in *spring, summer, or fall*.
- Those that mentioned *more than 10* trips to the trail were significantly more likely to:
 - have reported that they typically use the trail in *winter*
 - have not reported an overnight stay

Detailed Findings

Question 13. What did you/your group do on the trail today?

Trail Activity Performed

	Location of Interview								
	Total	Con-fluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohio-pyle	Rock-wood	West Newton
Bases:	1272	18*	127	22*	290	70	307	207	231
(Net) Biking	88.1%	83.3%	89.8%	95.5%	75.5%	92.9%	97.7%	89.9%	86.6%
Hike/walk	14.5%	22.2%	17.3%	4.5%	23.8%	8.6%	7.5%	14.5%	13.0%
Birding/ bird watching	2.9%	5.6%	2.4%	0.0%	6.2%	4.3%	1.0%	1.9%	2.2%
Jogging/running	2.7%	0.0%	2.4%	0.0%	5.5%	0.0%	0.0%	1.9%	4.8%
Eating/Picnic	1.8%	0.0%	0.0%	0.0%	1.4%	4.3%	4.9%	0.5%	0.0%
Photography	1.5%	11.1%	5.5%	0.0%	0.7%	2.9%	1.6%	0.5%	0.0%

*Caution: small base sizes

Findings

On the day they were interviewed, the vast majority (88.1%) of the respondents were *biking* and one in seven (14.5%) were *hiking/walking*.

- None of the other activities were mentioned by more than 3% of the respondents.
- Although still a very high proportion, respondents that were interviewed at Frostburg/Big Savage Tunnel were significantly less likely to have been *biking* compared to all of the other towns.
- Respondents that were *hiking/walking* were more likely to have been interviewed at either Confluence or Frostburg/Big Savage Tunnel than the other towns.

Subgroup Differences

- Those that were *biking* were somewhat more likely to:
 - have not reported typical use the trail in *winter*
 - have reported an overnight stay

Q13. continued →

Detailed Findings

- Respondents that were *hiking/walking* were somewhat more likely to:
 - have reported typical use the trail in *winter*
 - have not reported an overnight stay

Detailed Findings

Question 13a. How many persons in your group brought their own recreational equipment/gear?

Brought Own Equipment/Gear

Note:

Question 13a was asked of all respondents.

	Location of Interview								
	Total	Con-fluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohio-pyle	Rock-wood	West Newton
Bases:	1272	18*	127	22*	290	70	307	207	231
One	28.7%	16.7%	31.5%	13.6%	30.3%	21.4%	18.6%	28.0%	43.7%
Two	38.4%	27.8%	44.1%	59.1%	27.2%	35.7%	45.0%	42.5%	36.4%
Three or more	22.8%	27.8%	18.9%	27.3%	17.6%	32.9%	30.3%	23.2%	17.3%
None	10.1%	27.8%	5.5%	0.0%	24.8%	10.0%	6.2%	6.3%	2.6%

**Caution: small base sizes*

Findings

The vast majority of the respondents and/or the members of their group brought their own equipment/gear to the trail that day.

- Only one in ten (10.1%) respondents reported that *none* of the members of their group brought their own equipment/gear.
- Respondents that cited *none* were significantly more likely to have been interviewed in either Confluence or Frostburg/Big Savage Tunnel compared to those interviewed in other towns.
- Those reporting that *one* person brought their own equipment/gear were significantly more likely to have been interviewed in West Newton/Cedar Creek than any of the other towns.

Subgroup Differences

- Respondents mentioning either *one* or *none* were significantly less likely to have reported an overnight stay.
- Those mentioning that *three or more* people were significantly more likely to have reported an overnight stay.

Detailed Findings

Question 13b. How many persons in your group rented their equipment/gear?

Rented Equipment/Gear

	Location of Interview								
	Total	Con-fluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohio-pyle	Rock-wood	West Newton
Bases:	1272	18*	127	22*	290	70	307	207	231
One	1.1%	11.1%	0.0%	0.0%	0.7%	0.0%	2.6%	0.0%	0.9%
Two	2.0%	5.6%	0.8%	0.0%	1.0%	4.3%	4.9%	0.5%	0.4%
Three or more	2.6%	0.0%	0.0%	0.0%	5.5%	0.0%	3.9%	1.0%	1.3%
None	94.3%	83.3%	99.2%	100.0%	92.8%	95.7%	88.6%	98.6%	97.4%

**Caution: small base sizes*

Findings

The vast majority (94.3%) stated that *none* of the members of their group rented equipment/gear at the trail that day.

- Respondents reporting that at least *one* people in their group had rented equipment/gear were significantly more likely to have been interviewed in Ohiopyle compared to all the other towns.

Subgroup Differences

- Those reporting that at least *one* of the members in their group had rented equipment/gear were significantly more likely to have reported an overnight stay.

Detailed Findings

Question 14. What was your/your group's primary reason for using the trail today?

Primary Reason for Using Trail

Note:

Question 14 was asked of all respondents.

	Location of Interview								
	Total	Con-fluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohio-pyle	Rock-wood	West Newton
Bases:	1272	18*	127	22*	290	70	307	207	231
(Net) Recreational activity	59.7%	72.2%	50.4%	72.7%	50.7%	65.7%	73.6%	57.5%	55.8%
(Net) Health and/or Fitness	38.3%	22.2%	45.7%	22.7%	47.6%	31.4%	24.4%	40.6%	43.7%
Commuting	0.5%	0.0%	0.8%	0.0%	0.7%	1.4%	0.0%	1.0%	0.0%
Refused/No answer	0.2%	0.0%	0.8%	4.5%	0.0%	0.0%	0.0%	0.0%	0.0%

**Caution: small base sizes*

Findings

Very few respondents reported using the trail for any other purpose other than *recreational activity (89.7%)* and/or *health/fitness (38.3%)*.

- Respondents using the trail for a *recreational activity* were more likely to have been interviewed in Confluence, Cumberland, Meyersdale, or Ohio-pyle compared to the other towns.
- Those using the trail for *health and/or fitness* were significantly more likely to have been interviewed in Connellsville, Frostburg/Big Savage Tunnel, Rockwood, or West Newton/Cedar Creek compared to the other towns.

Subgroup Differences

- Respondents using the trail for a *recreational activity* were significantly more likely to:
 - have not reported typical use of the trail in *winter*
 - have reported an overnight stay
- Those using the trail for *health and/or fitness* were significantly more likely to:
 - have reported typical use of the trail in *winter*
 - have not reported an overnight stay

Detailed Findings

Question 15. Have you/your group, or do you/your group plan to, purchase or rent equipment, food, clothing, souvenirs, etc., in the communities along the trail or trailhead today?

Purchase/Plan to Purchase

	Location of Interview								
	Total	Con-fluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohio-pyle	Rock-wood	West Newton
Bases:	1272	18*	127	22*	290	70	307	207	231
Yes	67.5%	72.2%	59.8%	68.2%	63.8%	50.0%	80.8%	59.9%	70.1%
No	32.5%	27.8%	40.2%	31.8%	36.2%	50.0%	19.2%	40.1%	29.9%

**Caution: small base sizes*

Findings

The majority (67.5%) of respondents mentioned that they did plan to make purchases in the communities along the trail on the day they were interviewed.

- Respondents reporting intent to make purchases were significantly more likely to have been interviewed in Ohio-pyle compared to all other trail towns.

Subgroup Differences

- Those mentioning intent to make purchases were significantly more likely to have reported an overnight stay.

Note:

Question 15 was asked of all respondents.

Detailed Findings

Question 15a. What do you estimate your total spending will be in the communities today on.....?

Your Estimated Spending

Note:

Question 15a was asked of all respondents.

	Location of Interview								
	Total	Con-fluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohio-pyle	Rock-wood	West Newton
Bases:	858	13*	76	15*	185	35*	248	124	162
Beverages									
Zero	43.9%	23.1%	38.2%	46.7%	35.7%	54.3%	48.0%	48.4%	45.7%
Less than \$10	45.6%	38.5%	47.4%	33.3%	54.6%	34.3%	40.7%	43.5%	47.5%
\$10 or more	10.5%	38.5%	14.5%	20.0%	9.7%	11.4%	11.3%	8.1%	6.8%
Mean**	\$5.96	\$8.18	\$6.45	\$10.94	\$5.03	\$8.12	\$6.22	\$4.89	\$4.80
Clothing									
Zero	93.5%	100.0%	94.7%	86.7%	97.8%	91.4%	91.1%	83.9%	99.4%
Less than \$10	0.9%	0.0%	2.6%	0.0%	1.1%	2.9%	1.2%	0.0%	0.0%
\$10 or more	5.6%	0.0%	2.6%	13.3%	1.1%	5.7%	7.7%	16.1%	0.6%
Mean**	\$22.02	\$0.00	\$9.50	\$30.00	\$12.50	\$12.67	\$25.45	\$23.85	\$10.00
Candy/Snacks									
Zero	79.1%	61.5%	71.1%	73.3%	84.9%	77.1%	81.0%	71.8%	81.5%
Less than \$10	16.4%	23.1%	21.1%	13.3%	11.4%	20.0%	12.1%	27.4%	17.3%
\$10 or more	4.4%	15.4%	7.9%	13.3%	3.8%	2.9%	6.9%	0.8%	1.2%
Mean**	\$6.07	\$6.00	\$6.68	\$16.50	\$6.75	\$4.50	\$7.22	\$4.42	\$4.17
Daily Equipment Rental (bikes, etc.)									
Zero	95.1%	92.3%	98.7%	93.3%	99.5%	100.0%	88.7%	98.4%	95.1%
Less than \$10	0.8%	0.0%	1.3%	0.0%	0.0%	0.0%	1.6%	0.0%	1.2%
\$10 or more	4.1%	7.7%	0.0%	6.7%	0.5%	0.0%	9.7%	1.6%	3.7%
Mean**	\$21.86	\$25.00	\$9.00	\$40.00	\$25.00	\$0.00	\$22.64	\$35.00	\$14.38
Ice Cream									
Zero	76.3%	61.5%	84.2%	66.7%	75.7%	85.7%	66.1%	74.2%	90.7%
Less than \$10	21.0%	38.5%	13.2%	26.7%	22.2%	11.4%	29.4%	22.6%	9.3%
\$10 or more	2.7%	0.0%	2.6%	6.7%	2.2%	2.9%	4.4%	3.2%	0.0%
Mean**	\$4.87	\$4.40	\$4.75	\$12.00	\$4.82	\$6.40	\$5.06	\$4.09	\$2.93
Restaurants									
Zero	39.3%	15.4%	51.3%	40.0%	49.2%	48.6%	25.8%	34.7%	46.3%
Less than \$10	8.5%	0.0%	11.8%	0.0%	1.1%	5.7%	12.9%	8.1%	11.1%
\$10 or more	52.2%	84.6%	36.8%	60.0%	49.7%	45.7%	61.3%	57.3%	42.6%
Mean**	\$19.62	\$20.91	\$17.16	\$23.56	\$19.32	\$26.33	\$21.04	\$19.14	\$16.48

*Caution: small base sizes

**Note: mean calculation did not include \$0 values

Q15a. continued →

Detailed Findings

	Location of Interview								
	Total	Con- fluence	Conne- llsville	Cum- berland	Frost- burg	Meyer- sdale	Ohio- pyle	Rock- wood	West Newton
Bases:	858	13*	76	15*	185	35*	248	124	162
Souvenirs									
Zero	89.6%	84.6%	96.1%	86.7%	90.8%	91.4%	91.1%	88.7%	84.0%
Less than \$10	3.4%	7.7%	2.6%	0.0%	0.5%	2.9%	3.6%	3.2%	6.8%
\$10 or more	7.0%	7.7%	1.3%	13.3%	8.6%	5.7%	5.2%	8.1%	9.3%
Mean**	\$12.57	\$8.50	\$6.67	\$27.50	\$12.88	\$21.67	\$12.70	\$11.07	\$11.87
Transportation (shuttling, taxi, etc.)									
Zero	98.4%	92.3%	100.0%	93.3%	98.9%	97.1%	97.2%	100.0%	98.8%
Less than \$10	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%
\$10 or more	1.5%	7.7%	0.0%	6.7%	1.1%	2.9%	2.8%	0.0%	0.6%
Mean**	\$50.86	\$25.00	\$0.00	\$40.00	\$15.00	\$125.00	\$67.86	\$0.00	\$8.50
Other (miscellaneous) items									
Zero	92.4%	100.0%	92.1%	66.7%	95.1%	91.4%	94.4%	94.4%	87.0%
Less than \$10	3.1%	0.0%	2.6%	6.7%	0.0%	2.9%	2.8%	2.4%	8.0%
\$10 or more	4.4%	0.0%	5.3%	26.7%	4.9%	5.7%	2.8%	3.2%	4.9%
Mean**	\$14.68	\$0.00	\$26.33	\$18.20	\$13.33	\$23.67	\$12.07	\$21.86	\$9.14
Individual Package Cost									
Zero	92.1%	76.9%	96.1%	86.7%	84.9%	100.0%	94.8%	90.3%	95.7%
Less than \$200	4.2%	23.1%	3.9%	13.3%	0.0%	0.0%	4.4%	8.9%	3.7%
\$200 or more	3.7%	0.0%	0.0%	0.0%	15.1%	0.0%	0.8%	0.8%	0.6%
Mean**	\$350.00	\$31.67	\$11.67	\$25.00	\$702.29	\$0.00	\$176.08	\$48.25	\$155.00

***Caution: small base sizes**

****Note: mean calculation did not include \$0 values**

Findings

Respondents were asked to report how much they spent/planned to spend on several different items and services. Overall, the vast majority of the respondents spent/planned to spend *zero dollars* on all but two of the items/services.

- The majority of the respondents spent/planned to spend money at **restaurants**, with over half (52.2%) mentioning *\$10 or more* and 8.5% mentioning *less than \$10*. The mean expenditure was \$19.62.
- The majority of the respondents also spent/planned to purchase **beverages**, with nearly half (45.6%) citing *less than \$10* and 10.5% citing *\$10 or more*. The mean expenditure was \$5.96.

Q15a. continued →

Detailed Findings

- The only other items/services that more than one in five respondents spent/planned to spend money on were:
 - **Candy/snacks** (16.4%, *less than \$10* & 4.4%, *\$10 or more*)
 - **Ice cream** (21.0%, *less than \$10* & 2.7%, *\$10 or more*)
- Respondents that spent/planned to spend money on **clothing** were significantly more likely to have been interviewed in either Cumberland or Rockwood than one of the other towns.
- Those who spent/planned to spend money on **daily equipment rentals** were significantly more likely to have been interviewed in Ohiopyle compared to any of the other towns.
- Respondents who spent/planned to spend money on **ice cream** were more likely to have been interviewed in Confluence, Cumberland, Ohiopyle, or Rockwood than any of the other towns.
- Those that spent/planned to spend money in **restaurants** were significantly more likely to have been interviewed in Confluence, Cumberland, Ohiopyle, or Rockwood than in one of the other towns.
- Respondents that spent/planned to spend money on **other (miscellaneous) items** were significantly more likely to have been interviewed in either Cumberland or West Newton/Cedar Creek compared to one of the other towns.
- Those who spent/planned to spend \$200 or more on **package costs** were significantly more likely to have been interviewed at Frostburg/Big Savage Tunnel than any of the other towns.

Subgroup Differences

- In general, respondents that spent/planned to spend *zero dollars* on items/services in the communities were significantly less likely to report an overnight stay.

Detailed Findings

Question 15b. What do you estimate your group's total spending will be in the communities today on....?

Estimated Group Spending

	Location of Interview								
	Total	Confluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohio-pyle	Rock-wood	West Newton
Bases:	635	9*	58	13*	130	27*	202	98	98
Beverages									
Zero	48.3%	22.2%	46.6%	46.2%	46.9%	51.9%	53.5%	44.9%	45.9%
Less than \$25	43.5%	55.6%	43.1%	23.1%	47.7%	37.0%	37.1%	48.0%	50.0%
\$25 or more	8.2%	22.2%	10.3%	30.8%	5.4%	11.1%	9.4%	7.1%	4.1%
Mean**	\$17.71	\$23.57	\$13.39	\$28.57	\$12.77	\$31.85	\$21.04	\$16.10	\$16.74
Clothing									
Zero	94.6%	100.0%	100.0%	69.2%	99.2%	88.9%	92.6%	89.8%	99.0%
Less than \$25	1.7%	0.0%	0.0%	0.0%	0.8%	0.0%	1.5%	6.1%	1.0%
\$25 or more	3.6%	0.0%	0.0%	30.8%	0.0%	11.1%	5.9%	4.1%	0.0%
Mean**	\$57.26	\$0.00	\$0.00	\$42.50	\$20.00	\$63.33	\$82.47	\$31.00	\$20.00
Candy/Snacks									
Zero	79.4%	77.8%	82.8%	53.8%	83.8%	77.8%	86.6%	63.3%	76.5%
Less than \$25	16.7%	22.2%	13.8%	15.4%	13.1%	18.5%	9.4%	31.6%	22.4%
\$25 or more	3.9%	0.0%	3.4%	30.8%	3.1%	3.7%	4.0%	5.1%	1.0%
Mean**	\$17.10	\$13.00	\$14.80	\$30.83	\$20.14	\$13.33	\$24.26	\$13.74	\$9.96
Daily Equipment Rental (bikes, etc.)									
Zero	92.3%	77.8%	96.6%	76.9%	98.5%	92.6%	86.6%	94.9%	93.9%
Less than \$25	2.4%	0.0%	3.4%	0.0%	0.0%	0.0%	3.5%	2.0%	4.1%
\$25 or more	5.4%	22.2%	0.0%	23.1%	1.5%	7.4%	9.9%	3.1%	2.0%
Mean**	\$56.57	\$37.50	\$15.00	\$43.33	\$80.50	\$100.00	\$50.41	\$123.00	\$33.33
Ice Cream									
Zero	73.4%	66.7%	91.4%	46.2%	77.7%	85.2%	63.9%	63.3%	87.8%
Less than \$25	23.0%	33.3%	8.6%	23.1%	19.2%	14.8%	30.2%	33.7%	12.2%
\$25 or more	3.6%	0.0%	0.0%	30.8%	3.1%	0.0%	5.9%	3.1%	0.0%
Mean**	\$15.66	\$10.33	\$5.60	\$26.43	\$12.76	\$12.50	\$220.33	\$11.58	\$6.75
Restaurants									
Zero	34.6%	11.1%	41.4%	46.2%	45.4%	51.9%	23.3%	34.7%	35.7%
Less than \$25	16.2%	22.2%	25.9%	7.7%	11.5%	0.0%	18.3%	16.3%	17.3%
\$25 or more	49.1%	66.7%	32.8%	46.2%	43.1%	48.1%	58.4%	49.0%	46.9%
Mean**	\$64.56	\$53.75	\$41.41	\$43.57	\$63.10	\$131.54	\$67.80	\$67.48	\$57.63

*Caution: small base sizes

**Note: mean calculation did not include \$0 values

Q15b. continued →

Detailed Findings

	Location of Interview								
	Total	Con-fluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohio-pyle	Rock-wood	West Newton
Bases:	635	9*	58	13*	130	27*	202	98	98
Souvenirs									
Zero	87.2%	88.9%	98.3%	76.9%	89.2%	85.2%	91.1%	86.7%	72.4%
Less than \$25	7.9%	11.1%	1.7%	0.0%	6.2%	3.7%	5.4%	9.2%	19.4%
\$25 or more	4.9%	0.0%	0.0%	23.1%	4.6%	11.1%	3.5%	4.1%	8.2%
Mean**	\$24.53	\$10.00	\$10.00	\$43.33	\$24.29	\$46.25	\$25.39	\$29.54	\$17.44
Transportation (shuttling, taxi, etc.)									
Zero	98.0%	100.0%	100.0%	76.9%	99.2%	96.3%	97.5%	100.0%	96.9%
Less than \$25	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%	2.0%
\$25 or more	1.6%	0.0%	0.0%	23.1%	0.8%	3.7%	2.0%	0.0%	1.0%
Mean**	\$116.70	\$0.00	\$0.00	\$43.33	\$30.00	\$100.00	\$218.00	\$0.00	\$55.67
Other (miscellaneous) items									
Zero	91.3%	100.0%	93.1%	61.5%	94.6%	92.6%	93.6%	91.8%	83.7%
Less than \$25	6.5%	0.0%	6.9%	7.7%	4.6%	7.4%	4.5%	5.1%	14.3%
\$25 or more	2.2%	0.0%	0.0%	30.8%	0.8%	0.0%	2.0%	3.1%	2.0%
Mean**	\$20.96	\$0.00	\$13.50	\$38.00	\$14.29	\$7.50	\$24.92	\$33.38	\$12.69
Individual Package Cost									
Zero	89.0%	88.9%	89.7%	61.5%	83.1%	96.3%	93.6%	81.6%	95.9%
Less than \$1K	6.8%	11.1%	8.6%	38.5%	1.5%	3.7%	4.5%	17.3%	3.1%
\$1K or more	4.3%	0.0%	1.7%	0.0%	15.4%	0.0%	2.0%	1.0%	1.0%
Mean**	\$2,970	\$65	\$884	\$37	\$4,150	\$300	\$7,471	\$180	\$2,585

*Caution: small base sizes

**Note: mean calculation did not include \$0 values

Findings

Respondents who reported traveling with at least one other person were then asked to estimate the spending of their group on the same items and services. Similar to the trend observed for respondent's own spending, the vast majority of the groups spent/planned to spend zero dollars on all but two of the items/services.

- Once again, the only two items/services that the majority spent/planned to spend money on were:
 - **Restaurants** (16.2%, less than \$25; 49.1%, \$25 or more; mean = \$64.56)
 - **Beverages** (43.5%, less than \$25; 8.2%, \$25 or more; mean = \$17.71)

Q15b. continued →

Detailed Findings

- The only other items/services that more than one in five groups spent/planned to spend money on were:
 - **Candy/snacks** (16.7%, *less than \$25* & 3.9%, *\$25 or more*)
 - **Ice cream** (23.0%, *less than \$25* & 3.6%, *\$25 or more*)
- Respondents that spent/planned to spend money on **clothing** were more likely to have been interviewed in either Ohiopyle or Rockwood compared to other towns.
- It was more likely for someone that spent/planned to spend money on **candy/snacks** to have been interviewed in Cumberland or Rockwood than one of the other towns.
- Respondents who spent/planned to spend money on **daily equipment rental** were more likely to have been interviewed in Ohiopyle than any of the other towns.
- Those that spent/planned to spend money on **ice cream** were more likely to have been interviewed in Cumberland, Ohiopyle, or Rockwood compared to other towns.
- It was more likely for someone who spent/planned to spend money at **restaurants** to have been interviewed in Confluence or Ohiopyle than one of the other towns.
- Respondents that spent/planned to spend money on **souvenirs and/or other (miscellaneous) items** were more likely to have been interviewed in West Newton/Cedar Creek than any of the other towns.
- Those who spent/planned to spend *less than \$1000* on **package costs** were more likely to have been interviewed in Rockwood compared to other towns.
- Those who spent/planned to spend *\$1000 or more* on **package costs** were more likely to have been interviewed at Frostburg/Big Savage Tunnel than in any of the other towns.

Subgroup Differences

- In general, groups that spent/planned to spend *zero dollars* on items/services in the communities were significantly less likely to report an overnight stay.

Detailed Findings

Question 16. In conjunction with your trip, have or will you plan an overnight stay?

Overnight Stay

Note:

Question 16 was asked of all respondents.

	Location of Interview								
	Total	Con- fluence	Conne- llsville	Cum- berland	Frost- burg	Meyer- sdale	Ohio- pyle	Rock- wood	West Newton
Bases:	1272	18*	127	22*	290	70	307	207	231
Yes	40.8%	66.7%	33.9%	45.5%	27.2%	62.9%	50.5%	48.8%	32.5%
No	59.2%	33.3%	66.1%	54.5%	72.8%	37.1%	49.5%	51.2%	67.5%

**Caution: small base sizes*

Findings

Four in ten (40.8%) of the respondents reported that they did plan an overnight stay in conjunction with their trip on the trail.

- Respondents interviewed in either Confluence or Meyersdale were significantly more likely to have planned an overnight stay than those interviewed in the other towns.
- Those that did not plan an overnight stay were significantly more likely to have been interviewed in Connellsville, Frostburg/Big Savage Tunnel, or West Newton/Cedar Creek compared to the other towns.

Subgroup Differences

- No significant differences were observed by subgroup.

Detailed Findings

Question 16a. In what type of accommodation do you plan on staying?

Overnight Accommodation

Note:

Question 16a was asked of all respondents that reported an overnight stay in conjunction with their trip.

	Location of Interview								
	Total	Con-fluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohio-pyle	Rock-wood	West Newton
Bases:	519	12*	43	10*	79	44	155	101	75
Campground	38.9%	16.7%	48.8%	50.0%	29.1%	22.7%	47.7%	37.6%	38.7%
Bed and breakfast	32.6%	58.3%	30.2%	10.0%	39.2%	43.2%	24.5%	34.7%	33.3%
Motel/Hotel/Hostel	22.0%	8.3%	23.3%	40.0%	19.0%	20.5%	26.5%	20.8%	17.3%
Friend or relatives home	6.9%	0.0%	4.7%	0.0%	10.1%	9.1%	4.5%	11.9%	4.0%
Not specified/Refused	0.6%	0.0%	0.0%	0.0%	1.3%	2.3%	0.6%	0.0%	0.0%

*Caution: small base sizes

Findings

Among respondents that did plan an overnight stay, the most frequently mentioned accommodations were *campgrounds* (38.9%) and/or *bed and breakfasts* (32.6%).

- Just more than one in five (22.0%) mentioned a *motel/hotel/hostel*.
- The only other accommodation cited by more than 2% of the respondents was *friend or relatives home*.
- Respondents that mentioned *campgrounds* were significantly more likely to have been interviewed in either Connellsville or Ohiopyle compared to those in the other towns.
- It was more likely for those who reported *bed and breakfasts* to have been interviewed in Confluence, Frostburg/Big Savage Tunnel, Meyersdale, Rockwood, or West Newton/Cedar Creek than either Cumberland or Ohiopyle.

Subgroup Differences

- No significant differences were observed by subgroup.

Detailed Findings

Question 16b. How much do you plan to spend for your overnight accommodations (per night)?

Amount Paid for Accommodations

Note:

Question 16b was asked of all respondents that reported an overnight stay, at an accommodation other than a friend's or relative's house, in conjunction with their trip. Only those that reported nightly spending on lodging were asked to estimate the amount.

	Location of Interview								
	Total	Con-fluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohio-pyle	Rock-wood	West Newton
Bases:	486	12*	42*	10*	71	40*	148	91	72
Included in my package cost	7.6%	8.3%	2.4%	20.0%	28.2%	2.5%	1.4%	1.1%	12.5%
Paid each evening for accommodations	91.6%	91.7%	97.6%	80.0%	71.8%	97.5%	96.6%	97.8%	87.5%
No answer/Refused	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%	1.1%	0.0%
Bases: \$ per night	445	11*	42*	10*	71	40*	148	91	72
-Zero	8.1%	0.0%	7.3%	0.0%	3.9%	28.2%	6.3%	3.4%	12.7%
-Less than \$25	23.4%	9.1%	26.8%	37.5%	2.0%	15.4%	28.7%	29.2%	23.8%
-\$25-\$99	42.5%	45.5%	43.9%	37.5%	49.0%	25.6%	40.6%	47.2%	44.4%
-\$100 or more	26.1%	45.5%	22.0%	25.0%	45.1%	30.8%	24.5%	20.2%	19.0%
Mean (\$/per night)	\$64.81	\$85.45	\$64.12	\$60.00	\$86.67	\$53.74	\$62.77	\$65.17	\$55.57

*Caution: small base sizes

Findings

The vast majority (91.6%) of the respondents who did not stay with their friends or relatives paid for their overnight accommodations each evening, which most often cost the respondents between \$25-\$99 (42.5%).

- About one-quarter each reported costs of either *less than \$25* (23.4%) or *\$100 or more* (26.1%).
- Less than one in ten (8.1%) indicated that they paid zero dollars for their accommodations.
- Those who mentioned the fact that their accommodations were *included in my package cost* were significantly more likely to have been interviewed in Frostburg/Big Savage Tunnel than all of the other towns, excluding Cumberland.

Q16b. continued →

Detailed Findings

- Respondent that reported *complimentary (\$0 per night)* accommodations were significantly more likely to have been interviewed in Meyersdale than the other towns.
- Those that cited nightly accommodation costs of *less than \$25* were significantly less likely to have been interviewed in either Confluence or Frostburg/Big Savage Tunnel compared to all of the other towns.
- Respondents mentioning nightly costs of *\$100 or more* were significantly more likely to have been interviewed in either Confluence or Frostburg/Big Savage Tunnel than the other towns.

Subgroup Differences

- No significant differences were observed by subgroup.

Detailed Findings

Question 16c. How many overnight stays have you/do you plan to have in conjunction with your visit to the trail?

Number of Overnight Stays

	Location of Interview								
	Total	Con-fluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohio-pyle	Rock-wood	West Newton
Bases:	486	12	42	10	71	40	148	91	72
Tonight only	19.8%	16.7%	19.0%	20.0%	8.5%	30.0%	23.0%	7.7%	34.7%
Two or more	73.3%	83.3%	73.8%	70.0%	69.0%	60.0%	75.0%	91.2%	56.9%
Not sure	7.0%	0.0%	7.1%	10.0%	22.5%	10.0%	2.0%	1.1%	8.3%

*Caution: small base sizes

Findings

The majority (73.3%) of the respondents who did not stay with their friends or relatives reported planning *two or more* overnight stays.

- One in five (19.8%) stated that their overnight stay was for *tonight only*.
- Less than one in ten (7.0%) were *not sure* how many overnight stays they will have.
- Respondents whose overnight stays were limited to *tonight only* were significantly more likely to have been interviewed in Meyersdale, Ohio-pyle, or West Newton/Cedar Creek compared to those interviewed in either Frostburg/Big Savage Tunnel or Rockwood.
- It was significantly more likely that those who mentioned planning an overnight stay of *two nights or more* to have been interviewed in Rockwood than any of the other towns.
- Those who were *not sure* were significantly more likely to have been interviewed at Frostburg/Big Savage Tunnel than another town.

Subgroup Differences

- No significant differences were observed by subgroup.

Note:

Question 16c was asked of all respondents that reported an overnight stay, at an accommodation other than a friend's or relative's house, in conjunction with their trip.

Detailed Findings

Question 17. How did you originally hear or find out about the trail?

Source of Awareness

Note:

Question 17 was asked of all respondents.

	Total	Location of Interview							
		Con-fluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohio-pyle	Rock-wood	West Newton
Bases:	1272	18*	127	22*	290	70	307	207	231
Family and Friends	50.2%	44.4%	43.3%	18.2%	55.9%	47.1%	51.1%	45.9%	53.7%
Live by the trail	17.1%	11.1%	23.6%	27.3%	16.9%	14.3%	11.1%	21.3%	18.6%
Internet search/ web site	15.3%	16.7%	16.5%	18.2%	12.4%	27.1%	15.6%	15.9%	13.4%
Bike/Recreation shop or store	7.6%	0.0%	3.9%	9.1%	12.8%	7.1%	6.5%	4.3%	8.2%
Newspaper	6.1%	5.6%	8.7%	4.5%	3.8%	12.9%	4.2%	6.8%	7.4%
Driving past/ roadside sign	5.1%	0.0%	3.1%	0.0%	2.1%	1.4%	4.9%	3.4%	13.9%
Magazine	4.0%	5.6%	3.1%	9.1%	0.0%	10.0%	4.9%	4.8%	5.2%
Don't know/ Don't recall	6.4%	5.6%	8.7%	4.5%	4.1%	12.9%	4.6%	7.2%	7.8%

***Caution: small base sizes**

Findings

The most frequently mentioned source of awareness for the trail was *family and friends* (50.2%).

- About one in six each reported that they either became aware of the trail because the *live by the trail* (17.1%) and/or from an *internet search/website* (15.3%).
- None of the other sources were mentioned by more than one in ten respondents.
- Respondents that reported learning of the trail through *family and friends* were significantly less likely to have been interviewed in Cumberland compared to all of the other towns.
- It was significantly more likely that a respondent, who reported awareness because *they live by the trail*, to have been interviewed in Connellsville, Cumberland, Frostburg/Big Savage Tunnel, Rockwood, or West Newton/Cedar Creek compared to Ohiopyle.

Q17. continued →

Detailed Findings

- Respondents that mentioned learning about the trail from an *internet search/web site* were:
 - significantly more likely to have reported an overnight stay
 - somewhat more likely to have been interviewed in Meyersdale compared to the other regions
- Those that learned of the trail from a *bike/recreation shop or store* were significantly more likely to have been interviewed at Frostburg/Big Savage Tunnel than another town.
- Respondents that became aware of the trail by *driving past/seeing a roadside sign* were significantly more likely to have been interviewed in West Newton/Cedar Creek than any other town.

Subgroup Differences

- Respondents that cited awareness because *they live by the trail* were significantly more likely to:
 - have reported typical use in the *winter*
 - have not reported an overnight stay
- Those that learned of the trail through either an *internet search/web site* were significantly more likely to have reported an overnight stay.
- Respondents that learned of the trail by *driving past/seeing a roadside sign* were significantly less likely to report an overnight stay.

Detailed Findings

Question 18. Which category best describes your total household income before taxes?

Household Income of Respondent

Note:

Question 18 was asked of all respondents.

	Location of Interview								
	Total	Con-fluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohio-pyle	Rock-wood	West Newton
Bases:	1272	18*	127	22*	290	70	307	207	231
Less than \$25K	9.0%	0.0%	8.7%	9.1%	20.0%	2.9%	5.9%	4.3%	6.1%
\$25K - \$50K	23.9%	11.1%	19.7%	31.8%	35.5%	25.7%	15.3%	19.3%	26.8%
\$51K - \$100K	32.5%	33.3%	33.9%	36.4%	25.2%	31.4%	37.5%	38.6%	28.6%
\$101K - \$150K	12.8%	16.7%	7.9%	0.0%	8.3%	8.6%	19.5%	19.3%	8.7%
\$151K - \$200K	4.5%	11.1%	5.5%	4.5%	3.1%	11.4%	4.9%	3.4%	3.5%
More than \$200K	3.9%	0.0%	3.9%	0.0%	3.1%	4.3%	5.9%	4.8%	2.2%
Refused	13.4%	27.8%	20.5%	18.2%	4.8%	15.7%	11.1%	10.1%	24.2%

**Caution: small base sizes*

Findings

The most frequently mentioned household income category was \$51K-\$100K (32.5%).

- Nearly one-quarter (23.9%) reported household income of \$25K-\$50K.
- One in eight (12.8%) cited household income of \$101K-\$150K.
- Respondents that reported household income of *less than \$50K* were significantly more likely to have been interviewed at Frostburg/Big Savage Tunnel than any other town.
- Those mentioning household income of \$101K-\$150K were significantly more likely to have been interviewed in either Ohiopyle or Rockwood compared to the other towns.

Subgroup Differences

- Respondents citing household income of *less than \$50K* were significantly less likely to have reported an overnight stay.
- Those mentioning household income of *more than \$100K* were significantly more likely to have reported an overnight stay.

Detailed Findings

Question 19. How would you rate your overall experience on the trail today?

Overall Experience on Trail

Note:

Question 19 was asked of all respondents.

	Location of Interview								
	Total	Con-fluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohio-pyle	Rock-wood	West Newton
Bases:	1242	18*	116	20*	281	68	307	206	226
5 - Excellent	70.4%	66.7%	67.2%	60.0%	62.6%	83.8%	77.9%	71.8%	67.3%
4 - Very good	21.8%	27.8%	26.7%	20.0%	18.1%	14.7%	20.5%	23.3%	26.1%
Top-two box	92.2%	94.4%	94.0%	80.0%	80.8%	98.5%	98.4%	95.1%	93.4%
3 - Good	4.8%	0.0%	5.2%	20.0%	8.2%	1.5%	1.6%	3.4%	5.8%
2 - Fair	2.9%	5.6%	0.9%	0.0%	10.7%	0.0%	0.0%	1.0%	0.9%
1 - Poor	0.2%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	0.5%	0.0%
Mean	4.6	4.6	4.6	4.4	4.3	4.8	4.8	4.7	4.6

*Caution: small base sizes

Findings

When asked to rate their the quality of their experience on the trail that day, the vast majority (92.2%) of the respondents provide a top-two box score, driven by seven in ten (70.4%) that provided a top-box, *excellent*, rating.

- Although very high ratings were received at each trailhead, respondents were significantly less likely to have given a top-two box score if they had been interviewed in either Cumberland or Frostburg/Big Savage Tunnel compared to the other towns.

Subgroup Differences

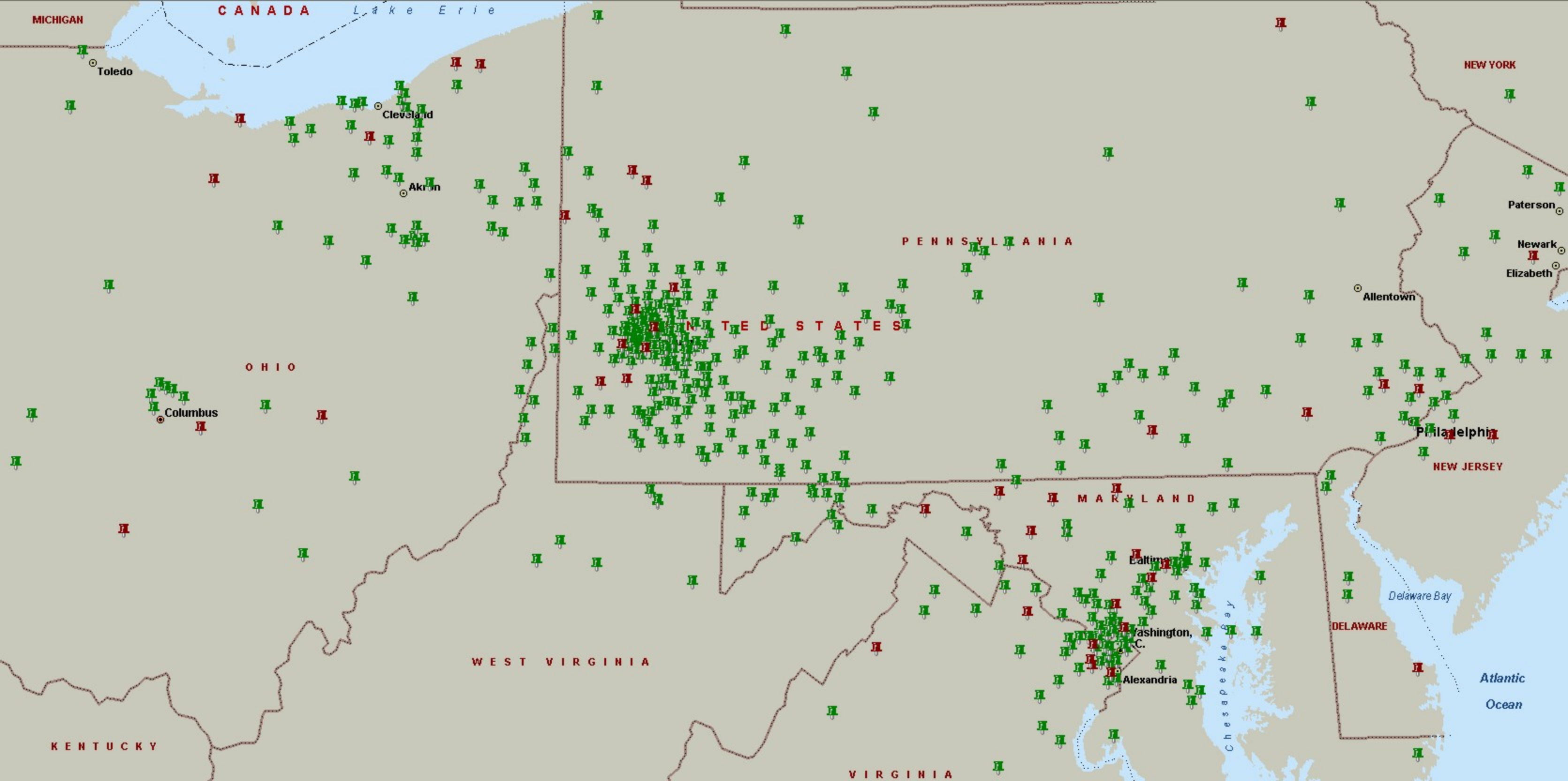
- Respondents that provided a top-two box rating were significantly more likely to have reported an overnight stay.



Appendix A – ZIP/Postal Codes

(On the Maps: **Green** PINS* = Visitors; **Red** PINS* = Non-visitors)

**Caution: PINS do not represent concentration levels (i.e., if a zip code was provided more than one trail user it is still represented by only a single PIN).*



MICHIGAN

CANADA

Lake Erie

Toledo

Cleveland

Akron

NEW YORK

Paterson

Newark

Elizabeth

PENNSYLVANIA

Allentown

OHIO

Columbus

PENNSYLVANIA
DELAWARE
NEW JERSEY

Philadelphia

NEW JERSEY

MARYLAND

Delaware Bay

DELAWARE

Atlantic Ocean

Ocean

WEST VIRGINIA

Baltimore

Washington, D.C.

Alexandria

Chesapeake Bay

KENTUCKY

VIRGINIA

Intercepted Trail User ZIPS

First 3 ZIP Code Values	Count	First 3 ZIP Code Values	Count	First 3 ZIP Code Values	Count	First 3 ZIP Code Values	Count
010	1	191	5	342	1	801	1
012	1	194	1	346	1	802	3
020	1	195	1	352	1	803	1
021	1	197	1	370	1	805	1
040	1	199	2	371	1	850	1
044	1	200	4	376	1	865	1
053	1	201	9	384	1	871	1
054	2	206	2	396	1	902	1
060	1	207	7	405	1	910	2
064	1	208	15	430	2	921	1
068	1	209	4	432	5	930	1
074	2	210	7	434	1	943	1
077	1	211	4	436	1	946	1
078	1	212	9	439	5	947	1
080	4	214	1	440	5	959	2
086	2	215	230	441	7	975	1
098	1	216	2	442	2	977	2
109	1	217	5	443	2	981	1
115	1	218	1	444	3	995	1
128	1	220	3	445	2	996	1
148	1	221	3	446	6	998	1
150	110	222	4	447	3	999	1
151	75	223	4	450	1	V58	1
152	132	225	4	452	1	VOJ	1
153	20	226	2	453	1		
154	93	228	1	454	3		
155	77	229	1	457	2		
156	123	231	1	460	2		
157	8	236	3	462	2		
158	1	260	4	467	1		
159	18	262	1	469	1		
160	7	264	2	480	2		
161	7	265	5	481	3		
162	3	267	4	482	1		
163	2	272	1	489	1		
164	1	278	1	522	1		
165	1	283	1	550	1		
166	6	284	2	554	2		
167	2	294	1	600	1		
168	3	295	1	605	3		
170	11	296	1	606	2		
172	1	301	1	618	1		
173	7	303	1	651	1		
175	2	305	1	658	1		
176	1	325	1	750	2		
177	2	327	1	770	1		
179	1	330	1	786	1		
184	2	334	1	787	2		
190	5	337	4	800	1		

Online Inq. Visitor ZIPS

First 3 ZIP Code Values	Count	First 3 ZIP Code Values	Count	First 3 ZIP Code Values	Count
032	1	215	7	611	1
054	1	216	2	634	1
056	1	217	3	730	1
057	1	220	3	761	1
077	1	221	2	800	1
078	1	222	4	801	1
079	1	223	4	857	1
080	1	226	1	939	1
085	2	230	1	940	1
105	1	235	1	954	1
109	1	240	1	956	1
115	1	244	1	972	1
117	1	245	1	980	1
144	1	254	3	986	1
148	1	260	1	995	1
150	10	263	1	R3G	1
151	7	267	1	V9G	1
152	14	280	1		
153	2	297	1		
154	4	320	1		
156	10	400	1		
157	1	431	1		
159	2	432	1		
160	3	433	1		
161	1	437	1		
162	1	440	3		
163	1	441	5		
165	2	442	3		
166	2	444	2		
168	1	446	1		
172	1	447	1		
173	3	448	1		
176	2	450	1		
180	1	452	1		
182	1	455	1		
189	1	465	1		
190	2	480	1		
196	1	481	1		
197	1	483	1		
200	2	488	1		
201	1	490	1		
202	1	493	1		
207	2	495	1		
208	8	531	1		
209	2	532	1		
210	6	567	1		
211	1	596	1		
212	4	601	1		
213	1	606	1		

Online Inq. Non-Visit ZIPS

First 3 ZIP Code Values	Count	First 3 ZIP Code Values	Count
049	1	503	1
070	1	805	1
080	2	890	1
109	1	902	1
117	1	949	1
125	1	M4S	1
150	3		
152	3		
153	3		
160	1		
161	2		
172	1		
174	1		
188	1		
190	1		
193	1		
194	1		
199	1		
201	1		
209	2		
210	1		
211	2		
212	2		
217	4		
220	2		
221	1		
223	1		
226	1		
229	1		
231	2		
254	1		
275	1		
281	1		
294	1		
347	1		
372	1		
431	1		
437	1		
440	2		
441	1		
448	2		
450	1		
452	1		
456	1		
460	1		
478	1		
481	2		
483	1		



Appendix B – Trail User Survey

2008 Trail Users Survey

Survey ID#: _____
 Date: _____
 Start Time: _____ Stop Time: _____
 Location: _____

Q1. Where did you start on the trail?

Q2. Will you be/have you been on the trail for successive days?
 Yes _____ **(Record Number)** 1 **^^Q22**
 No 2

Q3. What form of transportation did you use to get to the trail today?
 Bike 1
 Car/truck/van (personal) 2
 Car/truck/van (friends/family) 3
 Group tour bus 4
 Private shuttle service 5
 Public transportation (bus, taxi, etc.) 6
 Walked 7
 Other _____ 8

Q4. Where are you ending on the trail?

Q5. How far did you travel, **ONE WAY**, to come to the trail?
(Record Number) _____ Miles

Q6. How often, on average, do you use the trail?
 Once a week or more often 1
 Several times a month 2
 Several times a year 3
 Once a year 4
 This is my first time 5 **Skip to Q7**

Q6a. What days of the week do you typically visit the trail?
(Select all that apply)
 Monday-Thursday 1
 Friday 2
 Saturday 3
 Sunday 4

Q6b. What time(s) of year do you typically visit the trail?
(Select all that apply)
 Spring 1
 Summer 2
 Fall 3
 Winter 4
 Don't know/No pattern 5

Q7. Gender: **(Record by observation)**
 Male 1
 Female 2

Q8. Which of the following best identifies your age group?
(Read List)
 16-24 1
 25-34 2
 35-44 3
 45-54 4
 55-64 5
 65+ 6

Q9. What is your zip/postal code? _____

Q10. How many persons were in your group today?
 Just myself 1 **Skip to Q12b**
 Other **(Record Number)** 2

Q11. What type of group are you traveling with?
 Personal group of friends/family 1
 Packaged trip (commercial) 2
 Packaged trip (private) 3
 Fundraising trip 4
 Other _____ 5

Q12a. How many persons in your group are in the following age categories? **(Record Number)**
 Under 10 _____ 35-44 _____
 10-15 _____ 45-54 _____
 16-24 _____ 55-64 _____
 25-34 _____ 65 or older _____

Q12b. How many trips will each person in your group make to the trail this calendar year? **(Record Number)**
 You _____ Person 4 _____
 Person 1 _____ Person 5 _____
 Person 2 _____ Person 6 _____
 Person 3 _____ Person 7 _____

Q13. What did you/your group do on the trail today?
(Select all that apply)
 Bike 1
 Hike/Walk 2
 Jogging/Running 3
 Fishing 4
 Birding/Bird Watching 5
 Other _____ 6

Q13a. How many persons in your group brought their own recreational equipment/gear?

Q13b. How many persons in your group rented their equipment/gear?

Q14. What was your/your group's primary reason for using the trail today? **(Read List only if necessary)**
 Commuting 1
 Fitness training (marathon, triathlon) 2
 Health and exercise 3
 Recreation 4
 Other _____ 5

Q15. Have you/your group, or do you/your group plan to, purchase or rent equipment, food, clothing, souvenirs, etc., in the communities along the trail or trailhead today?
 Yes 1
 No 2 **Skip to Q16**

Q15a. What do you estimate **your** total spending will be in the communities today on....? **(If with group ask to exclude)**
 Beverages..... \$ _____
 Clothing \$ _____
 Candy/snacks \$ _____
 Daily Equipment rental (bikes, etc.) \$ _____
 Ice Cream..... \$ _____
 Restaurants..... \$ _____
 Souvenirs \$ _____
 Transportation (shuttling, taxi, etc.)..... \$ _____
 Other (sunscreen, film, etc.)..... \$ _____
 Individual Package Cost \$ _____

(i.e., if package cost is \$800 for food, lodging, and equipment, do not input \$ for those categories)

Q15b. What do you estimate **your group's** total spending will be in the communities today on....? **(Don't ask if alone)**

Beverages..... \$ _____
 Clothing \$ _____
 Candy/snacks \$ _____
 Equipment rental (bikes, canoes, etc.) \$ _____
 Ice Cream..... \$ _____
 Restaurants..... \$ _____
 Souvenirs \$ _____
 Transportation (shuttling, taxi, etc.)..... \$ _____
 Other (sunscreen, film, etc.)..... \$ _____
 Estimated group package cost..... \$ _____

(If unknown or can't estimate, SKIP group package cost)

Q16. In conjunction with your trip, have or will you plan an overnight stay?

Yes 1
 No 2 **Skip to Q17**

Q16a. In what type of accommodation do you plan on staying?

Bed and Breakfast 1
 Campground..... 2
 Friend or Relatives Home 3 **Skip to Q17**
 Motel/Hotel 4
 Other..... 5

Q16b. How much do you plan to spend for your overnight accommodations **(per night)** ? \$ _____

Q16c. How many overnight stays have you/do you plan to have in conjunction with your visit to the trail?

Tonight only..... 1
 Two or more..... 2
 Not sure..... 3
 Other..... 4

Q17. How did you originally hear or find out about the trail?

(Select all that apply and Record media source)

Word of mouth (friends, family, etc.)..... 01
 Bike/Recreation Shop or Store 02
 Driving past/Roadside sign..... 03
 Internet search 04
 Internet web site 05
 Live by the trail..... 06
 Magazine 07
 Newspaper 08
 Other 09
 Don't recall/don't know..... 10

Q18. Which category best describes your total household income before taxes? **(Read List)**

Less than \$25K 1
 \$25K to \$50K 2
 \$51K to \$100K 3
 \$101K to \$150K 4
 \$151K to \$200K 5
 More than \$200K..... 6
 Refused **(Don't read)**..... 7

Q19. How would you rate your overall experience on the trail today? **(Read List)**

Excellent 1 ****Q22**
 Very good 2 ****Q22**
 Good 3 ****Q22**
 Fair..... 4
 Poor..... 5
 Don't know **(Don't read)**..... 6

Q20. What else about the trail itself could make your experience better?

Q21. What else about the trail communities could make your experience better?

Q22. Additional comments?

****Note:** If trail user provided at least a **good** rating for overall experience (Q19) then ask for reason why?

^^Note: If respondent(s) is on a multiple day trip record how they arrived at and are planning to return to their original departure point.

THANK YOU!!

Appendix C – Supplemental Survey

07-294 Progress Fund - Supplemental Sample Survey (10/3/08)

Q17. How did you originally hear or find out about the trail?

(Select all that apply and Record media source)

- Word of mouth (friends, family, etc.) 01
- Bike/Recreation Shop or Store..... 02
- Driving past/Roadside sign 03
- Internet search 04
- Internet web site 05
- Live by the trail..... 06
- Magazine 07
- Newspaper 08
- Other 09
- Don't recall/don't know 10

QS1. After your inquiry online, did you visit the trail this season?

- Yes1
- No.....2 **SKIP TO QS5**

VISITORS

QS2. Aside from your visit to the trail, what additional activities and/or attractions did you visit in Southwestern Pennsylvania/Northern Maryland region this season?

QS3. Where you asked to complete a survey while visiting the trail?

- Yes1
- No.....2 **SKIP TO Q1**

QS4. Did you complete that survey?

- Yes1 **SKIP TO END**
- No.....2 **SKIP TO Q1**

NON-VISITORS

QS5 For what reasons did you decide to not visit the trail after your online inquiry?

QS6 How likely are you to consider using/visiting the trail in the future?

- Extremely likely5 **SKIP TO QS8**
- Somewhat likely.....4 **SKIP TO QS8**
- Neither likely nor unlikely3
- Not likely2
- Not at all likely.....1
- Don't know6

QS7 Why are you not likely to consider using/visiting the trail in the future?

QS8. Did you still visit other destinations in the Southwestern Pennsylvania/Northern Maryland region this season?

Yes1

No.....2 **SKIP TO QS9b**

QS9a. What activities and/or attractions did you visit in Southwestern Pennsylvania/Northern Maryland region this season?

GO TO QA

QS9b. What other destinations, attractions, and/or activities did you ultimately choose instead of visiting the Southwestern Pennsylvania/Northern Maryland region?

GO TO QA

2008 Supplemental Sample Survey

****ONLY ASK QA-Q6b if RESPONDENT HAD VISITED THE TRAIL AFTER INQUIRY**

QA. Date/Month of visit: _____

(USE DROP DOWN LISTS FOR THE ABOVE QUESTIONS)

Q1. Where did you start on the trail the day that you visited?

Q2. For this trip, were you on the trail for successive days?

- Yes _____ **(Record Number)** 1 **^^Q22**
- No 2

Q3. What form of transportation did you use to get to the trail that day?

- Bike 1
- Car/truck/van (personal) 2
- Car/truck/van (friends/family) 3
- Group tour bus 4
- Private shuttle service 5
- Public transportation (bus, taxi, etc.) 6
- Walked 7
- Other _____ 8

Q4. Where did you end on the trail that day?

Q5. How far did you travel, **ONE WAY**, to come to the trail that day? **(Record Number)** _____ Miles

Q6. How often, on average, do you use the trail?

- Once a week or more often 1
- Several times a month 2
- Several times a year 3
- Once a year 4
- This was my first time 5 **Skip to Q7**

Q6a. What days of the week do you typically visit the trail?

(Select all that apply)

- Monday-Thursday 1
- Friday 2
- Saturday 3
- Sunday 4

Q6b. What time(s) of year do you typically visit the trail? **(Select all that apply)**

- Spring 1
- Summer 2
- Fall 3
- Winter 4
- Don't know/No pattern 5

****ASK Q10 for BOTH Visitors and Non-Visitors**

Q10. How many persons were in your group that day?

- Just myself 1
- Other _____ **(Record Number)** 2

Skip to Q12b

(ONLY DISPLAY FOLLOWING for Non-Visitors)

- Did not participate in any alternative activities/ visit any other destinations this season 3

****ONLY ASK Q11-Q14 if RESPONDENT HAD VISITED THE TRAIL AFTER INQUIRY**

Q11. What type of group did you travel with that day?

- Personal group of friends/family..... 1
- Packaged trip (commercial) 2
- Packaged trip (private)..... 3
- Fundraising trip..... 4
- Other..... 5

Q12a. How many persons were in your group from the following age categories? **(Record Number)**

- | | |
|----------------|-------------------|
| Under 10 _____ | 35-44 _____ |
| 10-15 _____ | 45-54 _____ |
| 16-24 _____ | 55-64 _____ |
| 25-34 _____ | 65 or older _____ |

Q12b. How many trips did each person in your group make to the trail this calendar year? **(Record Number)**

- | | |
|----------------|----------------|
| You _____ | Person 4 _____ |
| Person 1 _____ | Person 5 _____ |
| Person 2 _____ | Person 6 _____ |
| Person 3 _____ | Person 7 _____ |

Q13. What did you/your group do on the trail that day?

(Select all that apply)

- Bike..... 1
- Hike/Walk..... 2
- Jogging/Running 3
- Fishing 4
- Birding/Bird Watching..... 5
- Other..... 6

Q13a. How many persons in your group brought their own recreational equipment/gear? _____

Q13b. How many persons in your group rented their equipment/gear? _____

Q14. What was your/your group's primary reason for using the trail that day?

- Commuting 1
- Fitness training (marathon, triathlon)..... 2
- Health and exercise 3
- Recreation 4
- Other..... 5

****ASK THE REMAINDER OF THE QUESTIONS to BOTH Visitors and Non-Visitors
(When viewing the survey online you will notice select verbiage changes for the Non-Visitor segment)**

Q15. Did you/your group, purchase or rent equipment, food, clothing, souvenirs, etc., in the communities along the trail or trailhead that day?

- Yes 1
- No 2 **Skip to Q16**

Q15a. What do you estimate **your** total spending was in the communities on the following items the day you visited the trail? **(If with group ask to exclude)**

- Beverages..... \$ _____
- Clothing \$ _____
- Candy/snacks \$ _____
- Daily Equipment rental (bikes, etc.) \$ _____
- Ice Cream..... \$ _____
- Restaurants..... \$ _____
- Souvenirs \$ _____
- Transportation (shuttling, taxi, etc.)..... \$ _____
- Other (sunscreen, film, etc.)..... \$ _____
- Individual Package Cost \$ _____

(i.e., if package cost is \$800 for food, lodging, and equipment, do not input \$ for those categories)

Q15b. What do you estimate **your group's** spending was in the communities on the following items the day you visited the trail? **(Don't ask if alone)**

- Beverages..... \$ _____
- Clothing \$ _____
- Candy/snacks \$ _____
- Equipment rental (bikes, canoes, etc.) \$ _____
- Ice Cream..... \$ _____
- Restaurants..... \$ _____
- Souvenirs \$ _____
- Transportation (shuttling, taxi, etc.)..... \$ _____
- Other (sunscreen, film, etc.)..... \$ _____
- Estimated group package cost..... \$ _____

(If unknown or can't estimate, SKIP group package cost)

Q16. In conjunction with your trip, did you have an overnight stay?

- Yes 1
- No 2 **Skip to Q19**

Q16a. In what type of accommodation did you stay?

- Bed and Breakfast 1
- Campground..... 2
- Friend or Relatives Home 3 **Skip to Q19**
- Motel/Hotel 4
- Other..... 5

Q16b. How much do did you spend on your overnight accommodations **(per night)**? \$ _____

Q16c. How many overnight stays did you plan in conjunction with your visit to the trail?

- Tonight only..... 1
- Two or more..... 2
- Not sure..... 3
- Other..... 4

Q19. How would you rate your overall experience on the trail that day?

- Excellent 1 ****Q22**
- Very good 2 ****Q22**
- Good 3 ****Q22**
- Fair 4
- Poor 5
- Don't know 6

Q20. What else about the trail itself could have made your experience better?

Q21. What else about the trail communities could have made your experience better?

Q22(a&b). Additional comments?

aNote:** If trail user provided at least a **good** rating for overall experience (Q19) then ask for reason why?

b^^Note: If respondent(s) is on a multiple day trip record how they arrived at and are planning to return to their original departure point.

Q7. Gender:

- Male 1
- Female..... 2

Q8. Which of the following best identifies your age group? (**NOT REQUIRED**)

- 16-24 1
- 25-34 2
- 35-44 3
- 45-54 4
- 55-64 5
- 65+ 6

Q9. What is your zip/postal code? _____

Q18. Which category best describes your total household income before taxes? (**NOT REQUIRED**)

- Less than \$25K 1
- \$25K to \$50K..... 2
- \$51K to \$100K..... 3
- \$101K to \$150K..... 4
- \$151K to \$200K..... 5
- More than \$200K 6

THANK YOU!!