

5 Profiling and Analysis

One of the objectives of this project was to address the four information gaps presented in the introduction of this report. These gaps were identified as missing from the current research on Waterfront Trail users. The data analysis in this section attempts to address these areas by comparing the survey results for different user groups.

While this section attempts to build a profile of certain users by creating distinctions, it should not be inferred that there are always statistically significant differences between these groups. In some cases the differences are significant, while in other cases they are not; but are presented to give the reader a sense of the direction of the difference.

We should also note that while it is helpful to build a profile to point out (for example) that Potential Vacationers show more interest in cultural activities than Non-Vacationers, this does not imply that cultural activities are only valuable to Potential Vacationers. See the Results section for more information.

The groups defined in this report are:

- **Aware Users, Unaware Users:** Those users who either knew or did not know that the trail section they were on was part of the Waterfront Trail.
- **Potential Vacationers, Non-Vacationers:** Those users who indicated that they either would or would not consider spending all or part of their vacation exploring other areas of the Waterfront Trail.
- **Residents, Visitors:** Those users who either traveled less than 5 kilometers to arrive at the trail or more than 5 kilometers to arrive at the trail. With 5 kilometers as the median. It was assumed that, for the most part, users reported the distance from their residence to the Trail. However, exceptions include those traveling from friends' houses, campgrounds, hotels, etc.
- **Short Distance On Trail Users, Long Distance On Trail Users:** Those users who traveled less than the median of 5 kilometers while on the trail or more than 5 kilometers.
- **Light Users, Medium Users, Heavy Users:** Those users who had visited the trail 0 to 14 times, 15 to 50 times and 51 or more times.

The data that demonstrated a particular pattern or trend is presented in the following analysis.

5.1 Analysis by Question

Arrival at the Trail

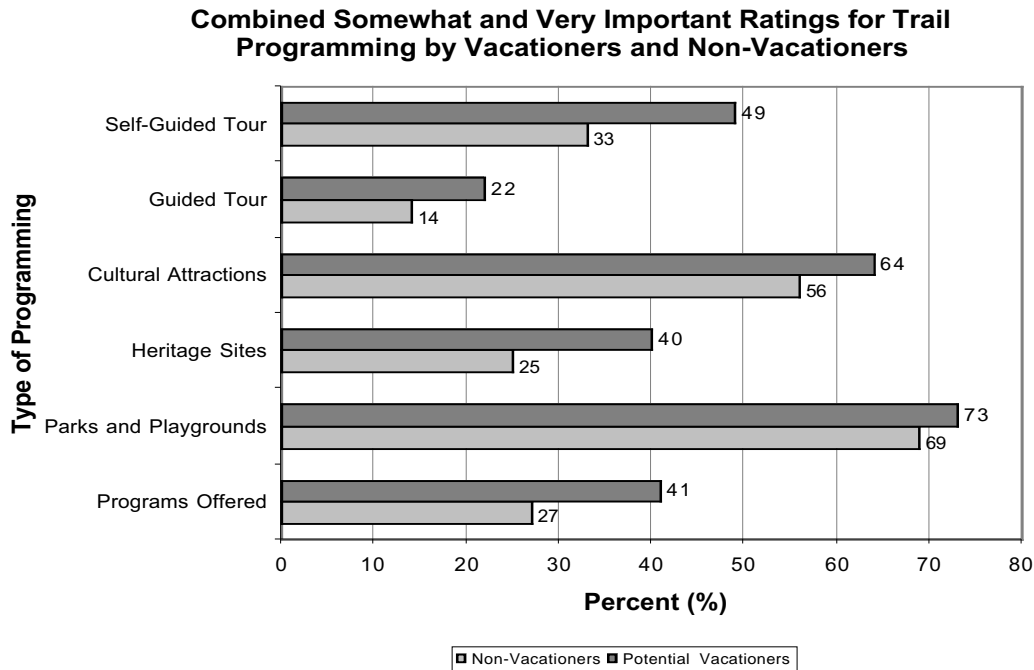
- Aware users tend to live near the Trail. Aware Users reported traveling a shorter distance to arrive at the Trail (13.1km) than Unaware Users who traveled an average of 32.3km (*Question 1*).
- Long Distance On Trail Users appear to travel further to get to the Trail than their counterparts. Long Distance On Trail Users reported, on average, traveling 20.3km compared to 15.8km of Short Distance On Trail Users (*Question 1*).
- Heavy Users reported traveling, on average, only 6.4km to get to the Trail compared with 26.2 km for Light Users. Frequent trail users are more likely to live adjacent to the Trail (*Question 1*).
- Potential Vacationers are slightly further from the Trail than their counterparts. They traveled an average of 19.8km to arrive at the Trail, while Non-Vacationers traveled only 13.8km (*Question 1*).
- Light Users had the highest reported usage of either a car/truck/van/motorcycle to arrive at the Trail (64%, as compared to Medium Users [54%] and Heavy Users [36%]), whereas Heavy Users had the highest reported usage of walking/running/jogging (34% as compared to Medium Users [17%] and Light Users [13%]) (*Question 2*).

Use of the Trail

- Trail users who frequent the trail less often appeared to spend slightly longer periods of time on the trail. Light Users reported spending 2.0 hours on average on the trail compared with 1.6 hours for Heavy Users (*Question 3*).
- Visitors Users reported spending a longer time on the Trail (2.1 hours) and traveling further (11.6km) on the trail than Residents (1.5 hours, 7.1km) (*Question 3 and 4*).
- Aware Users indicated they traveled slightly further (9.7 km) on the Trail than Unaware Users (7.9km).
- Potential Vacationers appeared to be more likely to use a bicycle (27%) on the Trail than Non-Vacationers (17%) (*Question 5*).
- Aware Users reported visiting the trail more frequently in the past year at an average of 81.4 times compared with Unaware Users who used the trail 46.1 times (*Question 6*).

Activities on the Trail

- Potential Vacationers seemed to be more likely to participate in self-guided and guided tours, as well as visiting heritage sites compared to Non-Vacationers (*Question 7*):



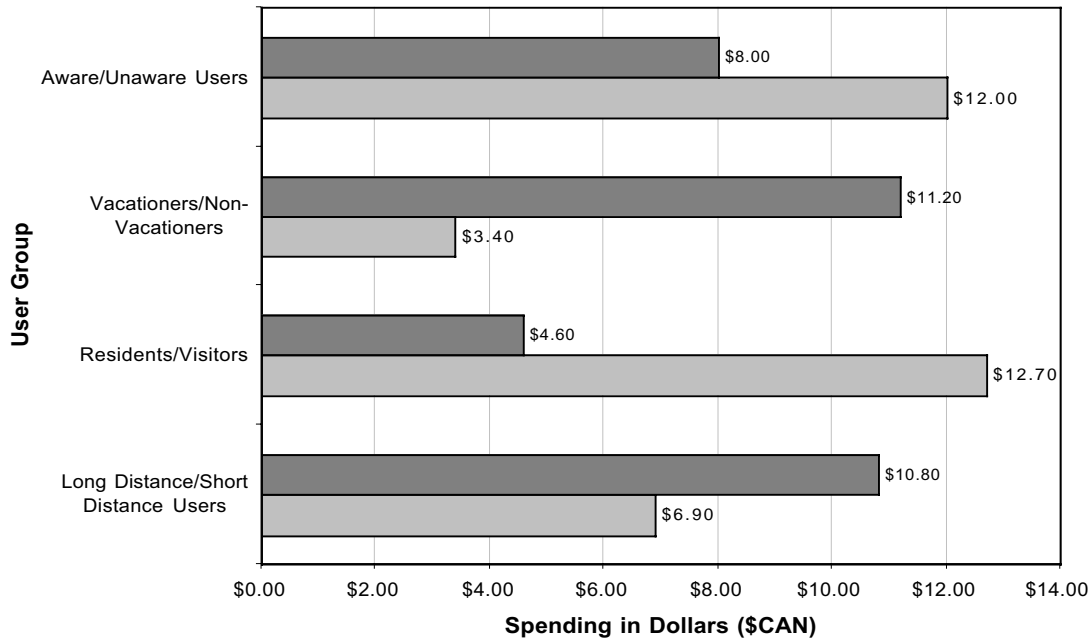
- 49% of Potential Vacationers reported that a self-guided tour was a somewhat or very important reason for using the Trail compared with 33% of Non-Vacationers.
 - 22% of Potential Vacationers reported that a guided tour was a somewhat or very important reason for using the Trail compared with 14% of Non-Vacationers.
 - 64% of Potential Vacationers reported that cultural attractions were a somewhat or very important reason for using the Trail compared with 56% of Non-Vacationers.
 - 40% of Potential Vacationers also reported that visiting heritage sites was a somewhat or very important reason for using the Trail compared with 25% of Non-Vacationers.
 - 73% of Potential Vacationers reported that accessing parks and playgrounds was a somewhat or very important reason for using the Trail compared with 69% of Non-Vacationers.
 - 41% of Potential Vacationers reported that Participating in the programs offered was a somewhat or very important reason for using the Trail compared with 27% of Non-Vacationers.
- Interest in cultural attractions, heritage sites, and parks declines with increased Trail use. Heavy Users reported that cultural attractions (“somewhat important”/”very important” 57%), heritage sites (27%), and parks and playgrounds (65%) were less important to them than Light Users (66%, 42%, and 77%, respectively) (*Question 7*).

- Frequent trail users appeared to be more likely to use the trail for physical fitness. 89% of Heavy Users rated “physical fitness” as a very important reason for using the trail compared to 71% of Light Users (*Question 8*).
- 51% of Aware Users rated “physical fitness” as their most important reason for using the Trail whereas 45% of Unaware-Users reported that “appreciating nature and the waterfront” was their most important reason (*Question 8*).
- 61% of Long Distance On Trail Users chose “physical fitness” as their most important reason for using the Trail over “to appreciate nature and the waterfront” (30%), while Short Distance On Trail Users chose appreciating nature and the waterfront (42%) over fitness (38%) (*Question 8*).
- Potential Vacationers also appeared to be slightly more interested in nature and the waterfront than Non-Vacationers. 38% of Potential Vacationers reported that “to appreciate nature and the waterfront” was their most important reason for using the Trail as compared to 28% of Non-Vacationers. On the other hand, 57% of Non-Vacationers reported physical fitness as the most important reason compared to 48% of Potential Vacationers (*Question 8*).
- Potential-Vacationers are much more likely to be interested in an organized tour (41%) than Non-Vacationers (12%) (*Question 9a*).



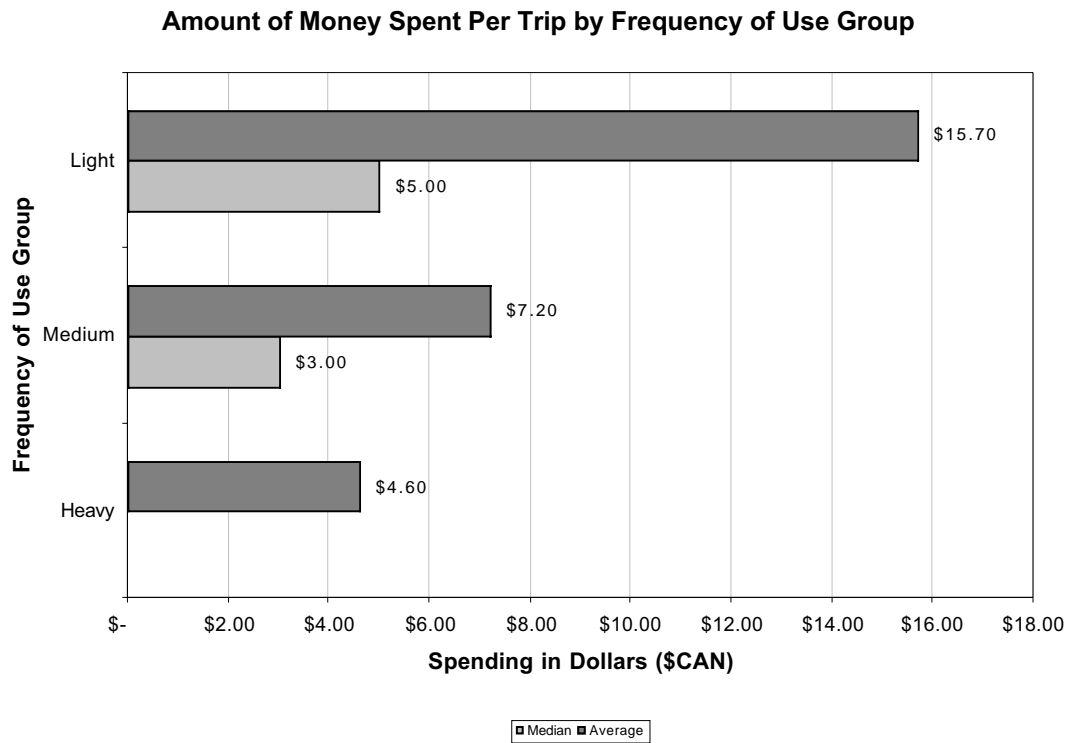
David Ritter, Waterfront Regeneration Trust

Average Amount Spent Per Trip by User Group



- Potential Vacationers spent an average of \$11.20 on the Trail while Non-Vacationers spent only \$3.40 (*Question 10*).
- Unaware Users spent an average of \$12.00 while Aware Users spent \$8.00 (*Question 10*).
- Visitors spent much more on the Trail than Residents Users, the difference being from \$12.70 to \$4.60. 50% of Residents spent a median of \$1.00 or less, whereas the median for Visitors was \$5.00 (*Question 10*).
- As might be expected Long Distance On Trail Users spent an average of \$10.80 while Short Distance On Trail Users spent \$6.90 (*Question 10*).
- Aware Users spent an estimated average of \$245 (\$30 median) annually compared with Unaware Users who spent \$129 (\$20 median) (*Question 10*).
- Potential Vacationers reported spending \$262 (\$52 median) annually compared with Non-Vacationers who spent \$62 (\$0 median) (*Question 10*).
- Resident Users spent an estimated annual average of \$180 with a median of \$0 while Visitors spend \$238 with a median of \$50.
- Long Distance On Trail Users reported spending an estimated annual average of \$244 with a median of \$50 compared with Short Distance On Trail Users who spent \$182 with a median of \$15 (*Question 10*).

- Heavy Users spent an estimated average of \$447 annually with a median of \$0 compared with Medium Users who spent \$186 with a median of \$100 and Light Users who spent \$93 with a median of \$30 (*Question 10*).



- User spending per trip decreases with frequent trail use. Heavy Users spent an average of \$4.60, while medium users spent \$7.20, and light users spent \$15.70. This trend seems to indicate that spending is inversely proportional to Trail use (*Question 10*).
- Differences were observed in types of spending between different groups. Potential Vacationers (16%) reported “retail” purchases 12% percent more than Non-Vacationers (4%), while Non-Vacationers spent slightly more on “refreshments” (86%) than Potential Vacationers (76%) (*Question 10a*).
- 7% more Long Distance On Trail Users reported “retail” spending over Short Distance On Trail Users (*Question 10a*).
- Visitors and Long Distance On Trail Users were 19% and 17% (respectively) more likely to cite Niagara-on-the-Lake as their favourite section of the Trail compared to Residents and Short Distance On Trail Users (*Question 12a*).
- 42% of Aware Users indicated that being on a continuous, community-linking trail is “very important” to them relative to Unaware Users at 31% (*Question 13*).

- 15% more Potential Vacationers rated “I am surrounded by nature” as “very important” to their experience of the Trail compared Non-Vacationers (*Question 13*).
- 73% of Potential Vacationers indicated “I am on a continuous trail that links communities from Niagara-on-the-Lake to Gananoque” as “very important”, or “somewhat important. A lower 52% of Non-Vacationers rated a continuous trail as “very important” or “somewhat important (*Question 13*).

Rating of the Trail

- The following groups were slightly more satisfied with the overall design of the Trail than their counterparts: Potential Vacationers (“excellent” 45%), Visitors (“excellent” 46%), and Long Distance On Trail Users (“excellent” 47%). Their counterparts rated the overall design at 34%, 38%, and 39%, respectively. Light Users (“excellent” 49%) were more satisfied than Heavy Users (“excellent” 36%) (*Question 16*).

User Information

- Residents (77%) knew that the trail they were on was part of the Waterfront Trail more often than Visitors (69%). The frequency of this knowledge also increases with Trail use, since Heavy Users (85%) are more likely to know about the Waterfront Trail than Medium Users (79%), who are in turn more likely to know than Light Users (70%) (*Question 19*).
- Light (52%) and Medium (52%) users were slightly more likely to visit the Trail with family compared to Heavy Users (46%). Heavy Users are more likely to use the Trail by themselves (Heavy Users: 14%, Light Users: 5%) (*Question 23*).

5.2 Summary and Profiling

Based on the preceding observations, the following generalized profiles of the “typical user” for each group have been identified.

Aware Users

- Are nearer to the Trail
- Use the Trail longer
- Visit the Trail more often
- Rate fitness higher as a reason for using the Trail
- Spend less money per trip to the Trail but more money annually
- Think a continuous, community-linking Trail is more important

...than Unaware Users.

Potential Vacationers

- Are further away from the Trail
- Are more likely to be using a bicycle on the Trail and less likely to be walking
- Are more interested in tours of the Trail
- Are more interested in cultural attractions, heritage sites, parks, and programming
- List “to appreciate nature and the waterfront” as their most important reason for visiting the Trail
- On average, spend approximately three times more money per trip and annually on the Trail
- Think a continuous, community-linking Trail is more important
- Are more satisfied with the Trail

... than Non-Vacationers.

Visitor Users

- Drive to the Trail more often
- Spend a longer time on the Trail
- Travel further along the Trail
- Visit the Trail less often
- Chose “to appreciate nature and the waterfront” as their most important reason for visiting the Trail
- Are more interested in vacationing on the Trail
- Spend, on average, nearly three times as much money per trip and almost twice as much money annually on the Trail
- Make retail purchases on the Trail more often

...than Residents.

Long Distance On Trail Users

- Travel further to get to the Trail
- Spend more time on the Trail
- Are more likely to be found riding bicycles or in-line skating
- Chose “physical fitness” as their most important reason for visiting the Trail
- Are more interested in vacationing on the Trail
- Are more interested in a Trail tour
- Spend more money per trip and annually on the Trail
- Listed Niagara-on-the-Lake as their favourite section of the Trail more often

...than Short Distance On Trail Users.

Light Users

- Travel twice as far to get to the Trail
- Drive to the Trail more often
- Spend more time on the Trail
- Are more interested in cultural attractions, heritage sites, and parks
- Chose “to appreciate nature and the waterfront” as their most important reason for visiting the Trail more often, and “physical fitness” less often
- Are less likely to be interested in a vacation on the Trail
- Spend over twice as much money per trip on the Trail but less money annually
- Make retail purchases on the Trail more often
- Are more satisfied with the overall design of the Trail
- Know that the trail they’re on is part of the Waterfront Trail less often
- Are less likely to use the Trail by themselves

...than Medium Users.

Medium Users

- Travel almost twice as far to get to the Trail
- Drive to the Trail more often
- Spend more time on the Trail
- Are more interested in cultural attractions, heritage sites, and parks
- Chose “to appreciate nature and the waterfront” as their most important reason for visiting the Trail more often, and “physical fitness” less often
- Spend more money per trip but spend less annually on the Trail
- Make retail purchases on the Trail more often
- Are more satisfied with the overall design of the Trail
- Know that the trail they’re on is part of the Waterfront Trail less often
- Are less likely to use the Trail by themselves

... than Heavy Users.

Heavy Users

- Travel nearly half the distance to get to the Trail
- Walk to the Trail more often
- Spend less time on the Trail
- Are less interested in cultural attractions, heritage sites, and parks
- Chose “physical fitness” as their most important reason for visiting the Trail more often, and “to appreciate nature and the waterfront” less often
- Spend less money per trip but spend more annually on the Trail
- Make retail purchases on the Trail less often
- Are less satisfied with the overall design of the Trail
- Know that the trail they’re on is part of the Waterfront Trail more often
- Are more likely to use the Trail by themselves

6 Conclusions

The purpose of the study has been to follow up on the findings from past Waterfront Trail user surveys by indicating current use patterns and trends as well as gauging the potential for tourism along the Trail.

Overall, the results of this study indicate a positive response from the public to the Waterfront Trail. The data suggests that municipalities have been successful in creating and maintaining an attractive trail that provides a wide range of benefits to users and trail communities. The Trail has continued to live up to its reputation as a multi-use pathway providing recreational opportunities, while enabling users to enjoy the natural surroundings of the Lake Ontario waterfront.

A central objective of the study was to address the information gaps that exist in research on the Waterfront Trail. It was decided that by focusing on these gaps, the economic, cultural and recreational benefits of the Waterfront Trail would become evident. In order to concentrate on the information gaps, Trail users were divided into five categories: Aware and Unaware users, Potential Vacationers and Non-Vacationers, Residents and Visitors, Long and Short Distance On Trail Users as well as Light, Medium and Heavy users. These results indicate some interesting findings in the overall patterns of trail use, and after further examination of the five groups, there are indications that significant opportunities exist for the Trail to become a tourist destination.

Trail Awareness

The study findings indicate a potential for the value of the Trail to be enhanced by increasing user awareness. It appears that users are curious about the potential of a longer trail. The more users know about the Trail the more they are likely to use the Trail and to support a continuous, community linking trail. Therefore by promoting the Trail more aggressively, Trail use could be increased.

An opportunity also exists to expand the sources that people use to learn about the Trail. The results show that currently most people learn about the Trail by living near it or by having previously seen the Trail. A potential direction for future promotion could focus on using written materials and creating awareness about the Waterfront Trust's website. Increasing the signage directly on the Trail could also help to raise user awareness. The results have also shown that an interest in the Trail exists from out-of-town users; so a target for Trail information material could effectively reach beyond immediate Trail residents.

Tourism Development

A potential topic for future study is an investigation of the possible effects of tourism development along the Trail. The results demonstrated that the majority of users would be interested in spending some or all of their vacation on the Trail. The waterfront itself seemed to be a major draw for first time users as well as being important to potential vacationers. In addition, a continuous, community-linking Trail seemed to be important to potential vacationers, which may suggest that a linked trail is more of a tourist/spending attraction than an unlinked trail. Another important finding indicated that potential vacationers were most likely to be using bikes which might suggest an important demographic for future tourism promotion.

Economic Benefits

Interesting economic linkages were unearthed in this study, with some results meriting future research. The data demonstrated that use patterns influenced how much money users spent and how they were likely to spend it. Long Distance On Trail Users spend more money on the trail for refreshments and retail purchases than Short Distance On Trail Users, which suggests that a longer, more connected, trail could signal an economic benefit. Another aspect to be looked into is the benefit of attracting occasional users who tend to spend the most money while on the Trail versus attracting heavy users who spend less but spend more over time due to their frequent use.

Development of Programming

Future study may also examine the potential for developing additional events and programming on the Trail. Participating in tours, heritage sites, and cultural attractions along the Trail was found to be important to those respondents identified as Potential Vacationers. Respondents also indicated that they would be most likely to frequent concerts and festivals located on the Trail.

This report has demonstrated that there is potential for the Waterfront Trail to grow and diversify into the future. For the past decade the Waterfront Trail has become a success through the hard work and dedication of the Waterfront Regeneration Trust and the Waterfront Partners. Over the next ten years the creative energies of the Trail Network will be employed in the generation of new projects, along with new ideas and new partnerships.

Most importantly, the results of this study indicate that the needs and desires of tourists are not very different from those of residents. Both are interested in cultural attractions and programming on the Trail. Tourism does not conflict with the community base and there is the potential for the community to become the tourist base. The implementation of a communication and marketing strategy is planned for the fall of 2002. A follow up to this user survey study will be important to examine how this strategy has affected Trail use patterns.



Nikki Rendle, Waterfront Regeneration Trust