



Waterfront Trail User Survey

May to August 2002

A look at people and places on the Lake Ontario waterfront



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Executive Summary

Over the past ten years the Waterfront Regeneration Trust has been working with communities from Niagara-on-the-Lake to Gananoque to link together the Lake Ontario waterfront. The most visible result of these efforts has been the Lake Ontario Waterfront Trail, a community resource that provides public access to the waterfront for recreation, entertainment, and relaxation. The first section of the Waterfront Trail, Hamilton to Trenton (now Quinte West) officially opened in 1995. Since then, communities in Niagara and to the east in the Greater Kingston area have been working to connect their communities to the Trail. In 1996, the Trust extended the Trail to Niagara-on-the-Lake and began signing portions of Trail east of Quinte West, for example, in Belleville. Once complete the Lake Ontario Waterfront Trail will stretch 740 kilometres along the waterfront from Niagara-on-the-Lake to Brockville.

The goal of the Trust and its partners is to achieve an uninterrupted greenway along the entire north shore of Lake Ontario with the Waterfront Trail serving as the backbone. While much has been accomplished, some sections of the Trail remain incomplete and the task of filling in the gaps is ongoing. The Waterfront Partners are also exploring ways for the Trail to reach its full potential as a tourist destination.

The objective of this study was to assist in these efforts by gathering and collating much needed information. More specifically, the survey team was asked to address four information gaps that were identified in the existing research on the Waterfront Trail:

- the economic benefits of the Trail;
- the availability and quality of events and programming;
- the awareness of the Trail;
- and the potential for tourism development.

The survey team studied the opinions of Trail users in order to address these objectives.

Findings

The Waterfront Trail continues to be a regeneration success story. Ninety-nine percent of respondents indicated that they would recommend the Waterfront Trail to other people, and 95% of respondents said that they supported the creation of a continuous trail linking waterfront municipalities. Eighty-eight percent of respondents rated the overall design of the Trail as either good (46%) or excellent (42%).

The Trail is a popular family destination, and receives consistently high ratings for the quality of its views, the environment it runs through, and for its maintenance, cleanliness, and safety. The Trail stands high in the opinions of its users, who support its existence and continuation.

In the chart below we compared trail attributes and amenities rated as most important to users with their evaluation of the Trail’s performance in these areas. The Trail scores well on the attributes and amenities that are considered most important to users.

IMPORTANCE OF TRAIL ASPECT IN VISITING THE TRAIL (PERCENTAGE OF RESPONDENTS WHO REPORTED TRAIL ASPECT TO BE SOMEWHAT OR VERY IMPORTANT)		RATING OF QUALITY OF TRAIL ASPECT (PERCENT OF RESPONDENTS WHO REPORTED ASPECT TO BE GOOD OR EXCELLENT)	
Appreciating nature and the waterfront	96%	Natural views from the Trail	89%
Being surrounded by nature	94%	Type of environment that the Trail runs through	83%
Being close to Lake Ontario	90%		
Being able to see Lake Ontario	87%		
Accessing parks and playgrounds	71%	Number and quality of playgrounds	59%
Experiencing cultural attraction	62%	Number of cultural/heritage attractions	37%
		Quality of cultural/heritage attractions	40%
Participating in the programs offered	37%	Number of family/children’s programs	24%
		Quality of family/children’s programs	25%
Visiting heritage sites	36%	Number of cultural/heritage attractions	37%
		Quality of cultural/heritage attractions	40%

Profile of Users

The overall profile of the Waterfront Trail user has remained, for the most part, consistent over the past six years. In both 1996 and 2002, survey teams found that physical fitness was the most important reason that respondents visit the Trail, with appreciating nature and the waterfront a strong second. User opinion about the quality of the Trail has remained consistently high since 1996. In 1996, 90% of respondents rated the overall quality of the Trail as either “good” (52%) or “excellent” (38%). In 2002 these numbers were nearly identical, with 91% of respondents choosing either “good” (52%) or “excellent” (39%). Respondents in both surveys gave the number of benches and garbage bins top ratings while expressing their dissatisfaction with the number of water fountains and bicycle racks. The clarity of signs on the Trail, rated as one of the worst aspects of the Trail in 1996, demonstrated strong growth in the minds of users, who placed it in the middle of the 2002 ratings. The distance respondents traveled to get to the Trail also increased from an average of 12 kilometers to 18 kilometers, reflecting better inter-municipal trail connections that facilitate a shift away from local-only Trail use. Perhaps related to this as well is the increase in commuter-use along the Trail, which rose from 14% in 1996 to 24% in 2002.

The Trail remains a three-season facility for most, however, winter use is substantial with 56% of respondents reporting either daily (17%), weekly (22%) or monthly use (19%).

To further understand the values and behaviours of Trail users, the study team compared the survey results for different user groups. The result is the creation of five user profiles:

Aware Users: Those users who knew that the trail section they were on was part of the Waterfront Trail.

- 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 on the Trail
- Think a continuous, community-linking Trail is more important

...than Unaware Users.

Potential Vacationers: Those users who indicated that they either would consider spending all or part of their vacation exploring other areas of the Waterfront Trail.

- 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 more often
- Spend, on average, approximately three times more
- Think a continuous, community-linking Trail is more important
- Are more satisfied with the Trail

... than Non-Vacationers.

Visitors or non-local users: Those users traveled more than 5 kilometers to arrive at the trail. With 5 kilometers as the median number of the data.

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

...than Local Users.

Long Distance Users: Those users who traveled more than 5 kilometers while on the trail. With 5 kilometers as the median number of the data.

- 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 more often
- Are more interested in vacationing on the Trail
- Are more interested in a Trail tour
- Spend more money
- Listed Niagara-on-the-Lake as their favourite section of the Trail more often

...than Short Distance Users.

Light Users: Those users who had visited the trail 0 to 14 times per year.

- 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 on the Trail
- Make retail purchases 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: Those users who had visited the trail 15 to 50 times per year.

- 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
- Spent more per trip to the Trail
- Make retail purchases 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: Those users who had visited the 51 or more times per year.

- 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 per trip to the Trail
- Made retail purchases 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

Economic Benefits

For the first time a preliminary study of user spending on the Waterfront Trail was conducted by the Trust. Respondents spent an average of \$9.20 per trip to the Trail, with average spending varying from \$30.20 per trip in Niagara-on-the-Lake to \$2.10 in Belleville and Pickering. Respondents mostly spent this money on refreshments, although retail spending was also significant. The study also found that Light Users of the Trail spent over three times the amount of money, per trip, when compared to Heavy Users. Potential Vacationers and Visitors to the Trail also reported a much higher per-trip spending rate. We also estimate that respondents spent an average of \$270 per-person **annually** while visiting the Trail. The economic patterns and benefits brought to light in this study signal both a significant economic contribution to local communities and the need for further research.

Trail Programming

Interest in programming on the Trail was also high amongst respondents. They attested to the appeal of tours, heritage sites, programs offered, and especially cultural attractions along the Trail. While respondents often indicated that they did not know about programming on the Trail, those that were aware of such programming rated it highly. Users surveyed also expressed interest in further development of activities along the Trail, reporting that they would attend various programs such as concerts, festivals, plays, and museums. Trail users may not know that the Waterfront Trail is a place to find cultural/heritage programs, but they have indicated their interest in it becoming one.

Trail Awareness

Trail awareness was high among respondents, given that 74% knew that the Trail they were on was part of the Waterfront Trail. This awareness comes mostly from proximity to the Trail, as the majority of respondents became aware of the Trail from either living near it, or seeing it. It was less frequent that respondents learned about the Trail through written materials, word of mouth, event coverage, or the Internet. Users are learning about the Trail primarily through the Trail itself.

The Trail as a Tourist Attraction

The strong potential for the Waterfront Trail to maintain and increase its profile as a tourist attraction was reflected in user response. Seventy-seven percent of respondents said they would consider spending part or all of their vacation exploring other areas of the Waterfront Trail. This group also reported a per-trip spending rate over three times that of respondents who indicated they would not be interested in a vacation along the Trail. Many respondents also reported having visited sections of the Trail other than the one in their community. Most frequently cited were: Niagara-on-the-Lake (53%), St. Catharines (20%), Hamilton (32%), Burlington (35%), Oakville (36%), Mississauga (30%), Toronto (49%), Cobourg (22%), Belleville (20%) and Kingston (25%). Respondents indicated the Trail is currently a tourist attraction, and has the potential to increase this profile.

Conclusions

These findings suggest the development of potential plans for action, and indicate a number of areas for further study. It appears that promotional efforts directed to increase people's knowledge of the Trail will increase its use, and that there are several untapped marketing channels available for this purpose. Users expressed interest in tourism and tourist attractions along the Trail, indicating that tourist promotion and development efforts will not be wasted. Users surveyed were also interested in further programming along the Trail, providing an optimistic outlook for program planning on the Trail. The spending patterns of users indicate significant economic benefits for the Trail community, and this study opens the door for further investigation into the effect of casual or frequent trail use on spending habits, as well as estimating economic benefits that fall beyond the scope this study.

This study has addressed the four information gaps, thus helping to clarify the Waterfront Trail's economic benefits, user awareness, programming potential, and tourism profile. The consistently high rating of overall quality, the positive level of user satisfaction with trail design and amenities, and the on-going support of users for a continuous trail that links communities to the waterfront is indeed a success story.

The results of this study will assist the Waterfront Trust and its local partners to continue to design a Waterfront Trail that delivers a safe and enjoyable recreation experience and that future projects and extensions to the Trail are planned and implemented successfully.



Nikki Rendle, Waterfront Regeneration Trust

1 Introduction

Launched in May 1995, the Waterfront Trail spans 350 kilometers of existing trails along the north shore of Lake Ontario. Since then, the Trust has been working with Waterfront communities in the Niagara Region. Once completed, the Trail will extend 740 kilometers from Niagara-on-the-Lake to Brockville. A popular attraction for walkers, cyclists, in-line skaters, boaters, and nature lovers, the recreation and commuter trail links over 184 natural areas; 161 parks, promenades and trails; 84 marinas and yacht clubs as well as hundreds of historic places, fairs, museums, art galleries, and festivals.

During the summer of 1996 and 1997 the Waterfront Regeneration Trust and its local partners set out to learn more about the people who use the Trail. A trail user survey was designed and conducted, which addressed a variety of topics and issues, from the personal motivations of Trail users, to user perceptions of safety and security. The results of the survey identified specific user groups, indicated a general pattern of user likes and dislikes, and provided recommendations from Trail users.

In early 2002 four information gaps were identified in the existing research on the Waterfront Trail. These gaps included the economic benefits of the Trail, the availability and quality of events and programming, the awareness of the Trail, and the potential for tourism development. As in 1996, a survey was again chosen in 2002 as the most suitable method of inquiry. The survey was conducted in the early summer of 2002 and was distributed at selected sites along the Waterfront Trail in 13 different municipalities. This survey was based on the 1996 study to provide consistency, but with additional questions designed to address the identified information gaps.

This report contains the findings of the 2002 Waterfront Trail User Survey. The results are presented in graphic form with accompanying interpretation.



Nikki Rendle, Waterfront Regeneration Trust

2 Methodology

2.1 Survey Development

The Waterfront Trail User Survey was developed through the collaborative partnership efforts of the Waterfront Regeneration Trust, its local partners, and the Levy-Coughlin Partnership. Twenty-eight questions were composed, and a target audience of Trail users fifteen years of age or older was identified. Efforts were made to ensure that the language and format of the survey were clear and concise. The survey questions were divided into five sections:

- 1) Your Arrival at the Trail
- 2) Your Use of the Trail
- 3) Your Activities on the Trail
- 4) Your Rating of the Trail
- 5) A Few Questions About You

A copy of the final questionnaire can be found in Appendix 7.1.

Survey Design and Sample Size

The survey was designed to be self-administered so that respondents could fill out the questions themselves, on site. The same survey questionnaires were distributed at each site to facilitate a comparison of findings. A sample size of 100 respondents was targeted for each site. In many cases, this goal was not achieved for reasons described in Section 3.1.

2.2 Survey Distribution

The surveys were distributed by two students hired for the summer as well as several volunteers. Fourteen local partners also participated in the survey design and in selecting locations for the 2002 survey:

City of Belleville
City of Burlington
City of Hamilton
City of Kingston
City of Mississauga
City of St. Catharines
City of Toronto
Hamilton Region Conservation Authority
Toronto and Region Conservation Authority
Town of Cobourg
Town of Niagara on the Lake
Town of Oakville
City of Oshawa
Town of Pickering
Municipality of Port Hope

Selection of Survey Sites

The surveys were conducted at various sites along the Waterfront Trail during the month of June 2002 (see table 1). Thirteen communities were chosen in an attempt to represent a diversity of Trail characteristics as well as to cover the length of the Trail.

Table 1: Survey Sites 2002 (in order of completion)

LOCAL PARTNER	SURVEYING SITE	LENGTH OF DESIGNATED TRAIL*
Hamilton Region Conservation Authority / City of Hamilton	Confederation Park	19 kms
Town of Niagara-on-the-Lake	Fort George	7.7 kms
City of St. Catharines	Port Dalhousie	15.2 kms
City of Burlington	Spencer Smith Park	31.1 kms
Town of Oakville	Bronte Harbour	17.1 kms
City of Mississauga	Jack Darling Park	22.5 kms
City of Oshawa	Lakeview Park	11.1 kms
Town of Pickering	Millennium Square	13.5 kms
City of Toronto/Toronto Region Conservation	Humber Bridge	34.3 kms
Municipality of Port Hope	The base of Lake Street and Hope Street	4.6 kms
Town of Cobourg	Victoria Park	17.6 kms
City of Kingston**	MacDonald Park	0 kms
City of Belleville	Bayfront Park	7.1 kms

* Designated-route is signed and recognized as part of the Waterfront Trail.

See Appendix 7.5 for a complete listing of designated/undesignated, on/off road Trail municipality.

** Kingston's waterfront is 46 kms, however no trail has been designated at this time.

Locations of Survey Sites

Survey sites were located directly on the Trail at points identified by the municipalities as busy areas used by a variety of trail user types (i.e. cyclists, walkers, in-line skaters, etc.).

Set-up of the Survey Station

The survey site was set up as a “cooling station” to provide a visual presence for the staff, a resting point for Trail users, and free water as an enticement to stop at the site. The site provided a table and chairs, a large map of the entire Waterfront Trail, and four advance notice signs saying “Waterfront Trail User Survey and Cooling Station Ahead”. The staff and volunteers wore t-shirts and nametags.

Data Collection

The survey was conducted between the hours of 9:00 am and 5:00 pm although weather conditions and relocation to different sites occasionally altered the time schedule. It was decided that weekends would be the busiest times and thus a better response could be achieved. As such, weekends were chosen as the days to distribute the survey. Surveys were also administered on two Wednesdays for scheduling reasons and because of inclement weather. User counts were recorded to estimate the level of use at each survey site. Survey times were divided into five, 1.5 hour time periods that began at 9:00 am and ended at 5:00 pm. The number of users who passed the survey site was recorded by activity, location, time of use, mode of transport and age group, as indicated on the sample user count sheet (Appendix 7.2).

Methods to Select Respondents

The “next to pass method” was used to select respondents. With this method the surveyor simply selects and approaches the next group or person to pass the survey site after a questionnaire has been started by someone else.



Fraser Closson

3 Overview of Findings

3.1 Response

In order to ensure reliable results for each survey site location, every attempt was made to collect a sample size of one hundred responses per site. However several factors influenced the response rate of the survey. The weather proved to be one constraint. The survey response rate was low when the surveyors visited Port Hope due to cloudiness and light rain. In addition, some stretches of the Trail were in rural areas, where a smaller population uses the Trail compared to the more urban, populated stretches. This created some difficulty in meeting the target sample size in the rural areas. As well, due to the time constraints some survey sites were grouped into one day visits such as Oshawa/Pickering on one day and Niagara-on-the-Lake/St. Catharines on another day.

In total, 745 surveys were completed.

3.2 Accuracy

The following table (table 2) displays the number of completed questionnaires and the statistical accuracy of the survey results. The accuracy of results for each individual partner ranges from + 9.8% to + 28.3%. Please note that the response rates for St. Catharines, Port Hope, Pickering and Oshawa were low due to the aforementioned reasons.

Table 2: Accuracy Rates by Municipality and Overall

	NUMBER OF SURVEYS COMPLETED	ACCURACY
Belleville	99	± 9.8%
Burlington	56	± 13.1%
Cobourg	67	± 12.0%
Etobicoke	91	± 10.3%
Hamilton	95	± 10.0%
Kingston	53	± 13.4%
Mississauga	75	± 11.3%
Niagara-on-the-Lake	50	± 13.9%
Oakville	78	± 11.1%
Oshawa	29	± 18.2%
Pickering	24	± 20.0%
Port Hope	12	± 28.3%
St. Catharines	16	± 24.5%
Total	745	± 3.5%

* Due to the very low response rates in Oshawa, Pickering, Port Hope, and St. Catharines, the individual results from these municipalities should be considered accordingly.

3.3 Analysis

Analysis of the survey returns was undertaken using a combination of frequencies and cross-tabulations. The results of these procedures are presented as a series of graphs in Section 4.

Please note that some of the graphs are marked with an asterix indicating that the data is based on the number of responses and not the number of cases. The number of cases refers to the total number of people who responded whereas the number of responses refers to the total number of check marks given for a particular question when respondents could choose more than one option. Therefore results that are based on the number of responses mean that the percentages reported are the percentage of responses made for a particular option divided by the total number of responses for the question. For example in question 11, out of the total number of check marks for the question, museums were chosen ten percent of the time.



David Ritter, Waterfront Regeneration Trust