

The Economic Impact of the Erie Canalway Trail

AN ASSESSMENT AND USER PROFILE OF NEW YORK'S LONGEST MULTI-USE TRAIL



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EXECUTIVE SUMMARY

When constructed in 1825 between Buffalo and Albany, the Erie Canal cost less than \$7 million and created thousands of jobs. Nearly two centuries later, the canal still plays a significant role in the economy and way of life of Upstate New York. Not only does it serve as a commercial and recreational waterway but much of the towpath of the legendary canal has been transformed into the 360-mile Erie Canalway Trail (ECT).

Presently, the ECT is more than 75% complete; 277 miles are open as an off-road multi-use trail. Most of the trail is 10 feet wide with a stone dust surface, but some sections are paved, especially near urban centers. The ECT offers New Yorkers a myriad of outdoor recreational opportunities and health, economic, and quality of life benefits. In addition to providing a venue for a wide variety of recreational activities—walking, jogging, bicycling, bird watching, pet walking, cross-country skiing and, in some locations, snowmobiling and rollerblading—the ECT offers picnic areas and opportunities to eat, stay, shop, and visit attractions in the historic towns and villages along its length.



Parks & Trails New York (PTNY), the state's leading not-for-profit park and trail advocacy organization, has worked with the New York State Canal Corporation and the Erie Canalway National Heritage Corridor for more than 15 years to develop and promote the Canalway Trail System. In conjunction with its efforts, PTNY gathered anecdotal evidence from business owners, tourism promotion agencies, elected officials, and trail users to suggest that the ECT provides trail communities with significant economic benefits. However, without a comprehensive study, only limited estimates of ECT visitation and economic impact existed.

Therefore, PTNY commissioned this study to provide reliable estimates of the numbers of persons who use the ECT; measurements of the total economic impact of the ECT on the economy of NYS; information on spending, usage patterns, and demographics of trail users; and a template for measuring the impacts of future use. Business owners and tourism officials were also surveyed to provide an added dimension to the assessment of economic impacts.

Study results were based on trail counts obtained using observational and electronic techniques. Data was also acquired from intercept surveys of trail users, conducted at multiple locations along the trail between June and September 2012. The counts were used to extrapolate an estimate of total annual trail traffic volume. Trail user surveys provided data to create user spending profiles. By employing these two data points (annual trail traffic volume and spending

profiles), the *Money Generation Model 2* (MGM2) was used to project the annual economic impact of trail users in terms of sales, employment, and tax revenues.

Economic Impact

Overall (including direct and secondary effects), ECT visitor spending generates approximately \$253 million in sales, 3,440 jobs, \$78 million in labor income, and \$28.5 million in taxes in the Upstate economy each year.

The most conservative estimate of new money would be only the spending associated with the 2.5% of estimated annual trail visits made by persons residing outside the 35 counties surrounding the ECT. This represents approximately \$55.8 million in new sales effects, the creation of approximately 731 jobs, and \$16.7 million in labor income within the local economy.

Visits

The ECT is estimated to have an annual trail traffic volume of almost 1.6 million visits per year. Not surprisingly, the segments of trail closest to the large urban population centers of Buffalo, Rochester and Albany were estimated to have the highest number of visits – more than 200,000 per year.

Spending

Average per person per visit spending depends on where ECT visitors live and whether they stay overnight. Locals (defined in the study as those residing in the 35 counties surrounding the ECT) who do not include an overnight stay in their visit spend on average \$26.37 per person per visit. Restaurant and bar expenses account for almost half of that spending. If these persons choose to engage in a visit to a segment of the trail distant from their homes and include at least one overnight stay in their visit, the average spending increases to \$531.47 per person per visit, which represents 39% for lodging or camping fees and 30% for bars and restaurants.

The average per person per visit spending for nonlocals (defined in the study as those who reside outside the 35 counties surrounding



ECT Visitor Spending

Total Impact

Annual Visits: 1.6 Million

Total Sales: \$253 Million

Total Taxes: \$28.5 Million
Federal, State and Local

Total Jobs: 3,440

Clothing & Sporting
Goods

\$11.50



Lodging

\$45.84



Admissions &
Fees



\$2.62

Transportation

\$14.55



Souvenirs, etc.

\$4.90



Groceries, Take-out
Food/Drinks



\$10.97

Restaurants & Bars



\$42.85



34%

9%

2%

8%

32%

11%

4%

the ECT) who include one or more overnight stays in their visit, is more than double that of those living in the 35 counties surrounding the ECT who stay overnight as part of their visit, \$1,128.39. Almost half (47%) of that spending is for lodging or camping fees and 26% for bars and restaurants.

The data confirms that overnight stays have a major impact on ECT visitor spending. While overnight visitors to the trail constitute only 18.25% of the total volume of visits, they generate 84% of overall spending. Even more dramatic is the finding that the 2.5% of trail visitors who live outside the 35 counties surrounding the ECT represent 21% of overall spending.



Trail Users

To learn more about trail user demographics, lifestyle preferences, nature of ECT use, and trail-related spending habits, survey responses were obtained from 562 adults that included trail users intercepted on the trail and those who had purchased PTNY's cycling guidebook and had used the trail within the last year.

Typical Users of the ECT

Typical users of the ECT are employed members of Generation X (ages 30-49) who are slightly more likely to be male than female and who live within five miles of the trail. They have at least a college degree and a household income equal to or slightly above the state's 2012 median household income of \$57,683. Typical trail users drive to the trailhead to bicycle for health and fitness for less than an hour at least once a week, on weekdays and weekends, in the summer, spring and/or fall, along with one to three other persons. They spend on average \$26.37 per person per visit.

Typical trail users are interested in the history of the canal and credit the trail for having a positive effect on their well-being. While they have not taken an overnight trip of more than 50 miles on the trail or participated in an organized ECT ride, they may be interested in doing so. If they did plan to stay overnight as part of a visit to the trail, they would prefer to stay in a hotel or motel.

Typical ECT User



57%
Male



41%
Generation X
(aged 30-49)



74%
Employed
Full or Part-Time



65%
4-Year or
Graduate Degree



42%
Household Income
over \$75,000



59%
Bicyclists



56%
Use Trail for Health,
Exercise and Fitness



79%
Interested in
Canal History



99%
Feel Trail Has a
Positive Effect on
Them



50%
Live Less than 5
Miles from Trail



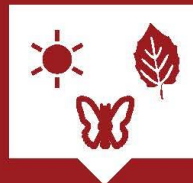
57%
Spend 1 Hour or
Less on Trail



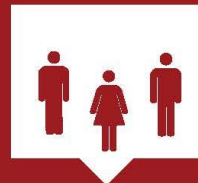
61%
Use Trail at Least
Once a Week



63%
Use Trail on Both
Weekdays and
Weekends



75%
Use Trail in
Spring, Summer
and Fall



45%
Use Trail
With 1-3
Others



59%
Drive to
Trailhead



69%
Interested in Biking
50+ mi on Trail



61%
Interested in
Organized Rides



42%
Prefer Hotel/
Motel Lodging



82%
Spend \$26.37
per Visit

Typical ECT Vacationers

Only 22% of those surveyed on the ECT indicated they were vacationing. Yet, because most of these vacationers stay overnight, they have a major economic impact. Typical trail vacationers are affluent, highly educated, employed Baby Boomers who live outside the ECT region and visit the trail to bicycle with one to three others for more than two hours. Almost 70% are male. The trail and the opportunity to bicycle and view the scenery attract them to the area.



Typical ECT vacationers spend on average \$939 per person per visit and stay at least three nights in a hotel or motel. ECT vacationers are interested in the history of the canal and participating in multi-day organized bicycling trips along the trail. They first learned about the ECT from conversations with others.

Interest in Biking Along a 50+ mile Section of ECT or an Organized Multi-day ECT Cycling Trip

The survey illustrated the potential for developing more multi-day or themed itineraries and organized multi-day ECT cycling trips. More than two-thirds of survey respondents reported they were very (41%) or somewhat (28%) interested in biking along a 50+-mile section of the ECT.

Nearly half of survey respondents (42%) said they had not been on an organized cycling trip on the ECT, but were interested in taking one. Among the 20% surveyed who had participated in such a trip, nearly all (19%) said they hoped to take another trip in the future. More than half (59%) of those who said they would be interested in an organized cycling trip on the ECT have a household income less than \$75,000 per year, half are of Generation X and almost half are under 40 years of age. As 89% of these persons are residents of the ECT and surrounding counties, it signals an important, but mostly untapped, local market.

Impact on ECT-area Businesses

When businesses located no more than one mile from the trail were asked to assess their current and future plans and experiences, more than half (51%) said the trail had a moderate (30%) to big impact (21%). A majority of businesses felt that efforts to promote the ECT, undertaken by several state agencies, Chambers of Commerce and local tourism offices, local business owners, and PTNY, were effective (6% very and 53% somewhat effective).

Typical ECT Vacationer



68%
Male



55%
Baby Boomers
(aged 50-69)



77%
Employed
Full or Part-Time



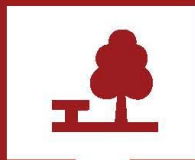
83%
4-Year or
Graduate Degree



52%
Household Income
over \$100,000



87%
Bicyclists



43%
Use Trail for
Recreation



85%
Interested in
Canal History



89%
Interested in Biking
50+ mi on Trail



75%
Interested in
Organized Rides



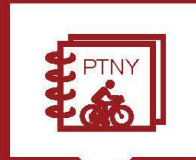
77%
Spend More
Than 2 Hours
on Trail



96%
Influenced by Trail
in Vacation
Destination Choice



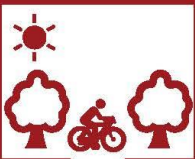
42%
Learned of Trail
by Word of
Mouth



69%
Use PTNY's
Guidebook to
Plan their Trip



74%
Use Trail
With 1-3
Others



75%
Chose ECT
for Biking and
Natural Scenery



81%
Stay Overnight



71%
Stay at Least 3
Nights



44%
Used Hotel/
Motel on Trip



\$939
Average
Spending per
Visit

Business owners' responses also indicated a need for additional communication and ECT promotion as 42% said that they knew "a few things" about the trail before the interview, compared to 29% who said they knew a lot. In terms of commitment to ECT promotion, 85% said they were very or somewhat interested in working closer with state, local and county agencies and Chambers of Commerce to promote the ECT.

Conclusion

By supporting more than 3,400 jobs and generating \$253 million in sales, the ECT is clearly an important resource for the local and regional economies of Upstate New York and should continue to be promoted and enhanced.

As 97% of the visits to the ECT are undertaken by persons living within the 35 counties surrounding the ECT, the study confirms the trail is also a valued resource and an important contributor to quality of life in the more than 200 communities along its length. The small number of visitors from outside the region illustrates a major opportunity to market the ECT as a premier bicycling destination to a national and international audience. Other long-distance trails with considerably less name recognition, such as the Katy Trail in Missouri and Great Allegheny Passage in Pennsylvania, attract a greater percentage of nonlocal visitors than the ECT. The study presents information on trail user demographics, preferences, and nature of trail use which can serve to inform these marketing efforts.

Overnight visitors to the ECT spend more than 20 times that of day visitors, so increasing the number of this type of visitor could generate significant economic benefits for ECT communities. Suggested or themed itineraries, package trips planned by a group of lodging establishments, fully supported rides, additional marketing targeted directly to cycling tourists, and a "cyclists welcome" program may increase the number of persons who include an overnight stay in their trail visit. As ECT users interviewed for the study said they are attracted by the beauty of the landscape, history of the canal, and the proximity of numerous related historic communities and sites, these aspects of the ECT should receive special emphasis in marketing efforts.

It is hoped that the results of this study will not only inform marketing messages and confirm the ECT as an important contributor to New York's economy but also instill government, business and tourism officials with the confidence to invest in additional ECT marketing, promotion, economic development, and trail enhancement efforts.



CHAPTER 1: INTRODUCTION

Background

New York State, and the entire United States of America, may never have become what it is today if Governor DeWitt Clinton (1769-1828) had not persisted in building a 363-mile canal that connected Buffalo and the Great Lakes with the Hudson River, New York City and the Atlantic Ocean. Skeptics called the Erie Canal "Clinton's Folly" when it was completed in 1825.

The canal cost less than \$7 million to build (about \$125 million in 2012 dollars) and created thousands of jobs. In addition to cutting the cost of transporting goods in both directions by 95%, the Erie Canal also spawned the construction of eight shorter connector canals: Cayuga-Seneca Canal; Oswego Canal; Champlain Canal; Crooked Lake Canal; Chemung Canal; Chenango Canal; Black River Canal; and Genesee Valley Canal. New Yorkers made hundreds of dollars for every dollar invested in the Erie Canal. Nearly two centuries later, the canal still plays significant roles, in addition to transportation, by providing a myriad of outdoor recreational opportunities and health and economic benefits that afford New Yorkers a positive quality of life.

As early as the 1960s, some canal communities that had lost most of their commercial canal traffic were seeking new ways to benefit from the canal and began building local trails on remnants of the old towpath. The first public expression of the Canalway Trail concept came with the release of the NYS Canal Recreation Development Plan in the early 1970s. Soon thereafter, the NYS Office of Parks and Recreation, today the Office of Parks, Recreation and Historic Preservation (OPRHP), and the NYS Department of Transportation entered into a formal agreement to jointly develop the 524-mile canal system, encompassing the Erie, Cayuga-Seneca, Oswego, and Champlain Canals, for recreational purposes. Many sections of the Canalway Trail were constructed during the next two decades.

In 1992, the NYS Legislature transferred responsibility for the Canal System to the NYS Thruway Authority and its subsidiary the NYS Canal Corporation and created the NYS Canal Recreationway Commission to advise the Thruway and NYS Canal Corporation on canal-related activities. In 1995 and 1996, respectively, the NYS Canal Corporation adopted the Canal Recreationway Plan and the NYS Canal Revitalization Plan to guide development of the Canal into a recreation system. Among the major recommendations made in the NYS Canal



Recreationway Plan was the completion of an end-to-end Canalway Trail along the canal system. In 2000, the U.S. Congress recognized the national significance of New York's canal system by establishing the Erie Canalway National Heritage Corridor which includes the Erie, as well as the Cayuga-Seneca, Oswego, and Champlain Canals and their historic alignments.

Since 1995, when the Canal Corporation assumed responsibility for the Canalway Trail and began implementing the Canal Recreationway Plan, more than 150 miles of Erie Canalway Trail (ECT) have been built. Ownership, maintenance and management of the ECT are split with the NYS Canal Corporation, NYS OPRHP, and counties and local municipalities each owning about one-third of the trail corridor.

Presently, the ECT is more than 75% complete – 277 miles are open between Buffalo and Albany. Most of the trail is 10 feet wide with a stone dust surface, but some sections are paved, especially near urban centers. In addition to providing a venue for a wide variety of recreational activities – walking, jogging, bicycling, bird watching, pet walking, cross-country skiing and, in some locations, snowmobiling and roller blading – the ECT also offers family picnic areas and opportunities to eat, stay, shop, and visit attractions in the historic towns and villages along its length.

Approximately 83 miles of the ECT have not yet been built, requiring users to divert to nearby roads for short or long stretches. Additional picnic areas, parking lots, rest rooms, camping areas and signage are also still needed along the corridor. Beyond the Erie Canalway Corridor, trails along the lateral Cayuga-Seneca, Oswego, and Champlain canals also need to be completed to create a more than 500-mile Canalway Trail System stretching across 32 counties of New York State.



Purposes of the Study

Parks & Trails New York (PTNY) is the state's leading not-for-profit park and trail advocacy organization, working since 1985 to expand, protect and promote a network of parks, trails and open space throughout New York State. PTNY actively promotes the Canalway Trail through its annual *Cycling the Erie Canal* bike tour, popular *Cycling the Erie Canal* guidebook, and online

interactive map. PTNY's *Close the Gaps* campaign, undertaken in conjunction with U.S. Senator Kirsten Gillibrand and the Canalway Trails Association New York (CTANY), works with local and state officials to advocate for completing the remaining sections of the Canalway Trail as a continuous off-road trail so it can realize its full potential as a world-class tourism destination and offer maximum benefit to the more than 200 communities along its length.

PTNY also works with local business owners and elected officials to attract and meet the needs of bicycle tourists through its *Bicyclists Bring Business* workshops and handbook. In conjunction with the NYS Canal Corporation, PTNY publishes *Canalway Trail Times* and organizes the *Canalway Trail Adopt-a-Trail* and *Trail Ambassador* programs and the annual *Canalway Trail User Count* and *Canal Clean Sweep*.

As a result of its long-standing relationships with ECT business owners, tourist promotion agencies, elected officials, and trail users, PTNY has gathered much anecdotal evidence to suggest that the Erie Canalway Trail provides trail communities with significant economic benefits. However, only limited estimates of ECT visitation and economic impact exist, based on PTNY's annual trail counts conducted at discrete locations and a 2007 study of the economic impact of New York State Canal tourism prepared for the Canal Corporation by Eric Mower and Associates, which relied on older average spending data from much different trail environments.

Since funding allocations and development decisions for the Canalway Trail will increasingly be based on a demonstrated ability to create jobs and generate a positive economic impact, it is crucial that local and state decision makers fully understand the direct impact of expenditures made by those who cycle, walk and jog the trail, as well as the indirect and induced effects that their spending generates. To best capture that potential spending, it is also necessary to learn more about the demographics and desires and motivations of ECT visitors to help inform future business development decisions and marketing and tourism promotion efforts.

PTNY commissioned this study for three primary purposes:

1. Provide reliable estimates of the numbers of persons who use the ECT, by section of the trail and by types of activities;
2. Provide valid measurements of the total economic impact of the ECT on the overall economy of NYS; and
3. Provide a benchmark against which to take statistical "snapshots" in subsequent years as well as a template for measuring the impacts of future marketing, promotion, and trail development.

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CHAPTER 2: RESEARCH METHODOLOGY & STUDY DESIGN

Overview

In order to complete the economic study of the Erie Canalway Trail, trail counts were conducted using both observational and electronic techniques. These trail counts were then extrapolated to estimate the total annual trail traffic volume at each count location and for the entire ECT. Trail user surveys were also conducted and analyzed to create user spending profiles. By employing these two data points (annual trail traffic volume and spending profiles), the *Money Generation Model 2* (MGM2) was used to project the economic impact of the trail users in terms of sales, employment, and tax revenues.¹ Business owners and tourism officials were also surveyed to provide an added dimension to the assessment of economic impacts.

The study design included the following steps:

Step 1: Conduct observational and electronic trail counts

Step 2: Estimate annual trail traffic volume

Step 3: Survey trail users

Step 4: Analyze trail user surveys to create user spending profiles

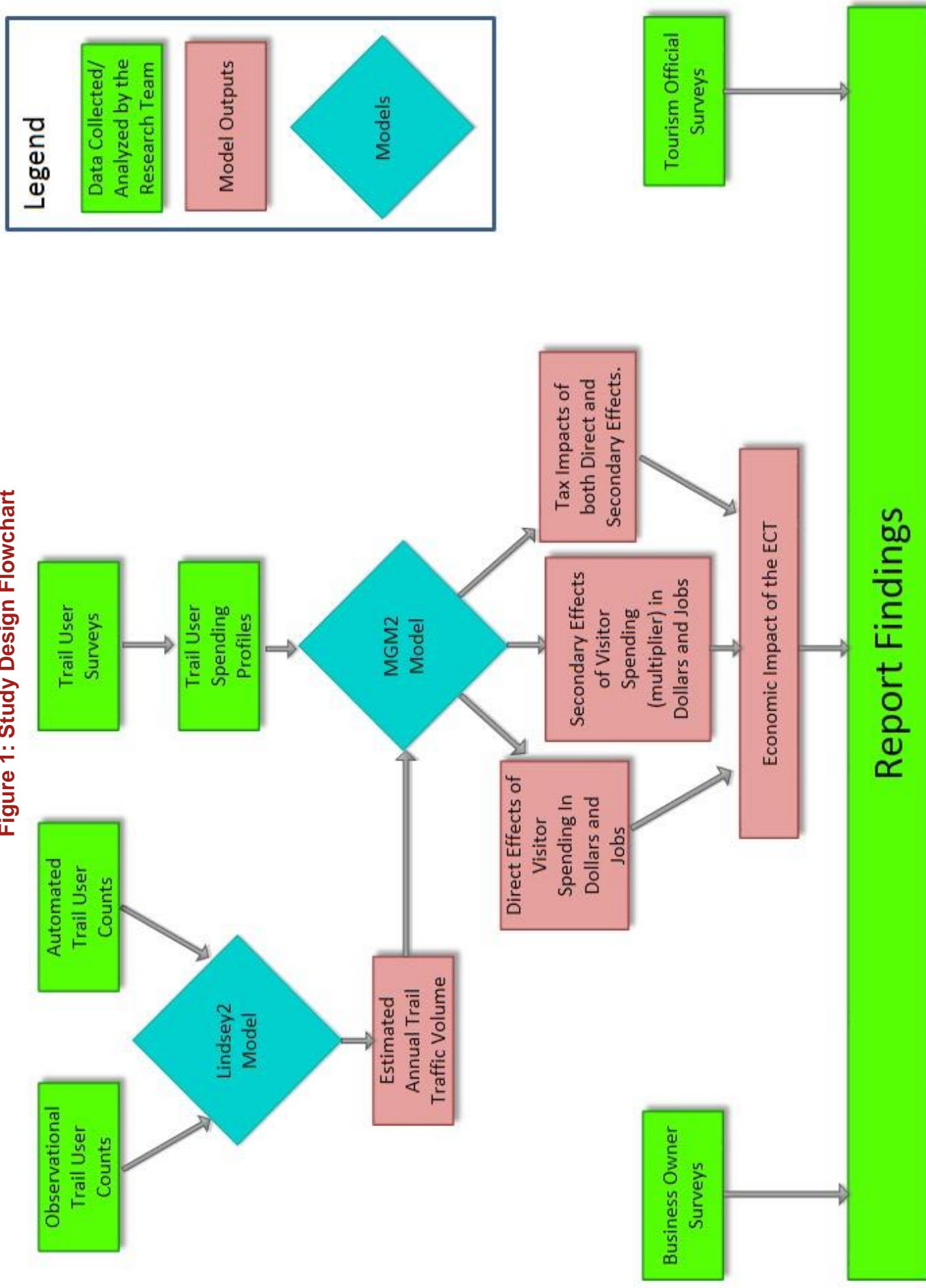
Step 5: Estimate annual economic impacts

Step 6: Survey business owners

Step 7: Survey tourism officials

The relationships between each step are demonstrated in Figure 1.

Figure 1: Study Design Flowchart



Data Collection Team and Process

Twenty-eight SUNY Geneseo students, each of who resided in a community along the ECT, were recruited to conduct trail counts as well as administer the trail user and business owner surveys. At a training session held in April 2012, the students received instruction on how to conduct the surveys and the trail user counts.

The SUNY Geneseo students began their work in late June 2012 and continued through the middle of September 2012, since these are the months of traditional peak trail use. Each session of trail counts and personal observations of trail uses lasted for two hours.

Observational and Electronic Trail Counts

The 360-mile ECT was divided into 13 geographic sections of roughly equal length. Counts were conducted within 11 of the 13 segments. See Appendix A for a description of segments and the chosen count locations within each segment.

The students conducted almost 400 hours of direct trail observations at diverse times of day, weather conditions, and days of the week. Data collection forms previously developed by PTNY were used to capture both count data and information on types of trail usage – such as walking, bicycling, roller blading, etc. and frequency of helmet use for cyclists. See Appendix B for a copy of the data collection form.

At five high-traffic points, the research team also installed an automatic trail counter (Eco-Counter) provided by PTNY. The Eco-Counter uses passive infrared pyro-electric technology to detect a change in temperature when a person passes in the range of the sensor.

The automatic counter remained at each location for at least one week. Observational counts were also conducted at two locations where the automatic counters were placed, Niawanda Park in the City of Tonawanda and the Nine Mile Creek Aqueduct in Camillus.



Annual Trail Traffic Volume

In order to extrapolate the observational and electronic trail counts into estimates of total annual trail traffic, data from the both the two-hour trail counts and the trail counter were entered into the *Lindsey 2 Model*.² The *Lindsey 2 Model* was originally developed by Dr. Greg Lindsey while at Indiana University. After years of data collection, Lindsey and his associates established rigorous correlational patterns, which have been developed into a guideline to accurately extrapolate an annual estimate of total trail traffic volume. Other models for estimating annual trail usage, such as the one developed by the *National Bicycle and Pedestrian Documentation Project* (NBPD) were considered, but the *Lindsey 2 Model* was selected because it is well-documented, peer reviewed, and provided the most conservative estimates.³

The *Lindsey 2 Model* was further customized to fit the trail usage patterns of Upstate New York. An ECT-specific peak hour ratio (pk_{hr}), defined as the percentage of traffic that the single highest hour encompasses within the context of a single day, was calculated using data from three of the automatic trail counters. The counters provided a breakdown of trail usage across three separate locations on an hour-to-hour basis during the month of July 2012, the month for which complete counter data was available. This peak hour ratio was then used in the equation found in Figure 2 to estimate monthly trail traffic volumes.

Counts, obtained by SUNY Geneseo student observers at multiple trail locations and from automatic counters located at Niawanda Park in Tonawanda and at Bushnell's Basin in Perinton, were used to compute the average weekday hourly traffic volume (avg_1). This was then divided by the peak hour ratio (pk_{hr}) to calculate the daily weekday average trail traffic. To simulate the total weekday traffic expected within a typical 30-day month, the daily weekday average trail traffic was multiplied by 22.

The total weekend traffic expected within the month was computed using the corresponding number of weekend days within the month, multiplied by the weekday average trail traffic and the ratio of median weekend day to median weekday traffic. The median weekday to weekend traffic ratio was derived from the human trail observations. The total weekend and weekday trail traffic volumes were then summed to yield a monthly total.

Figure 2: Monthly Trail Traffic Volume Equation⁴

$$month = \left(\left(\left(\frac{avg_1}{pk_{hour}} \right) \times 22 \right) + \left(\frac{avg_1}{pk_{hour}} \right) \times \left(\frac{med_{we}}{med_{wd}} \right) \times 8 \right)$$

At three locations (Nine Mile Creek Aqueduct in Camillus, Lions Park in Niskayuna, and the Corning Preserve in Albany) monthly trail traffic volumes were derived from the automatic counter data. At these locations, counter data for an entire week period was multiplied by 4.3 to obtain a monthly total.⁵

The *Lindsey 2 Model* utilizes coefficients, based on observations of the numbers of trail users in each month, to extrapolate a single monthly estimate into annual trail traffic volume. Because of relatively similar seasonal conditions, it was assumed that traffic along the ECT throughout the

year experiences monthly trail traffic ratios similar to that discovered by Lindsey in Indiana.⁶ Thus, the mean monthly ratios developed by *Lindsey et al.* (2007) were used to estimate trail traffic volume for each month of the year. These monthly estimates were summed to obtain an estimate of annual traffic volume for each count location.⁷

In most instances, the annual estimates are based on counts from only one location within a segment. For three segments (Rochester to Newark, Oriskany to Herkimer, and Mohawk to Canajoharie), they represent an average of annual estimates from multiple sampling locations.

The estimates for each segment were totalled to arrive at an estimate of annual trail traffic volume for the entire ECT. While summing the estimates from each section may register a long-distance trail user more than once, the impact is most likely negligible because 82% of all trail users are day visitors (i.e. they typically visit the trail for one single day of activity at a time). In addition, 80% of all survey respondents, including many overnight visitors, indicated they spend two hours or less on the trail during a typical visit, and most counters were located at least 10 miles apart. (A two-hour round trip to the trail would likely represent about 10 miles one-way on a bike and less distance if walking or jogging.)

Trail User Surveys

In consultation with PTNY, a trail user survey was developed to cover spending, usage patterns, and demographics within a comfortable 10-minute (or less) timeframe (see Appendix C). The survey was then pre-tested on a small number of ECT trail users. Once the survey was approved, an online version was developed using Lime Survey Tool software on a secure server at SUNY Geneseo.

The trail user survey was conducted concurrently with the two-hour trail counts during the June through September 2012 timeframe. Surveyors randomly selected trail users to participate in the survey. Respondents were given the choice of either completing their interview on the student laptop along the ECT or later online. Everyone received a one-page flier that provided instructions on how to complete the questionnaire online.

By the end of September 2012, 444 complete, usable surveys resulting from user intercepts on the trail were received. To round out the sample, the survey of intercepted trail users was supplemented with additional trail user surveys that were distributed to individuals who had purchased PTNY's *Cycling the Erie Canal* guidebook and



who indicated they had visited the ECT within the last year. These separate user responses from guidebook purchasers constituted another 118 survey records, increasing the total sample size to 562 complete, usable survey records. This sample size is large enough to provide the target confidence level of 95%.⁸

In order to ensure statistically rigorous estimates of the spending of trail users, an analysis of covariance (ANCOVA), which controlled for zone, was performed on the two samples (intercepted trail users and guidebook purchasers). The ANCOVA test confirmed there are no statistically significant differences between the two samples. Thus it can be concluded that the two samples are from the same population, and thus can be pooled to compute the spending profiles used in the *MGM2 model*. While guidebook purchaser responses were used to compute spending profiles, the percentage of users by zone was calculated using only trail intercepted surveys to ensure accuracy of the results.

User Spending Profiles

Spending questions from the *MGM2 model* were incorporated into the trail user survey administered by SUNY Geneseo students. The *MGM2 model* frames questions in reference to the most recent visit and requests that the user fill out how much was spent on accommodations, restaurants, transportation, souvenirs, tourism venues, and several other categories. The survey also included separate questions designed by the SUNY Geneseo researchers that asked for a more holistic estimate of how much, on average, the interviewee spent on each of the different kinds of activities they engaged in along the trail. The spending data was segregated by zone of residence of the person surveyed and whether the individual was a day or overnight visitor to the trail. The zones were defined as follows:

- **Zone One:** Respondents reside within one of the 14 counties through which the ECT passes or within one of the 21 counties adjacent to the 14 ECT counties⁹
- **Zone Two:** Respondents from all other (more distant) locations, within New York State and in 20 other states and the District of Columbia.

Overnight visitor status was defined as someone who either reported they were vacationing away from their home or reported spending on lodging as part of the visit. Responses to the question “How many nights did you, or do you plan to, stay away from home?” were also considered in identifying overnight visitors.

Annual Economic Impacts

Using the annual trail traffic volume and spending profiles generated through on the ground data collection, the *Money Generation Model 2* (MGM2) was used to project the economic impact of

the trail users, in terms of sales, employment and tax revenues.¹⁰ The *MGM2 model* is a set of Microsoft Excel workbooks for estimating the economic impacts of visitor spending on a local region. The model was originally developed by Ken Hornback and refined by Daniel Stynes and Dennis Propst at Michigan State University to produce quantifiable measures of economic benefits that can be used for planning, concessions management, budget justifications, policy analysis and marketing at National Parks. Since its development, the *MGM2 model* has been adapted for use on a wide range of economic impact studies for recreational resources other than National Parks such as Missouri's Katy Trail, another primarily rural multi-use, long distance trail.



The *MGM2 model* is also designed to use data collected at National Park entrances to compute visitation, but this was inapplicable to the present study. As outlined under Annual Trail Traffic Volume above, total ECT trail volume was computed using the *Lindsey2 Model*.

The annual trail traffic volume figures and the spending profiles derived from the trail user surveys were input into the *MGM2 model* to estimate both direct and secondary effects. Direct effects represent the jobs, income, taxes, and sales in the businesses that receive money directly from trail users such as motels, restaurants, attractions, retail stores. Secondary effects, including both indirect and induced effects, represent the jobs, income, taxes, and sales resulting from tourism businesses buying goods and services from other industries in the region as well as households re-spending income earned from trail user spending.

The *MGM2 model* was adapted to the ECT environment by using an average local tax rate for the 14 ECT counties as well as the smaller cities *MGM2 model* generic multiplier to estimate secondary effects. The smaller cities category (50,000-100,000 population) was chosen as it was believed to most conservatively represent the ECT's combination of rural and urban environments.¹¹

Business Owner Survey

A questionnaire was designed for use in interviewing the owners of local businesses along the ECT (see Appendix D). The objective of this parallel survey was to learn more about the impacts of ECT traffic and spending on revenues and jobs generated in local businesses between Buffalo and Albany. Surveyors were instructed to visit local businesses no more than one mile from the trail and solicit the business owners' feedback. A rough guide of business types was provided to

the surveyors, however the selection was intentionally left open in order to preclude the possibility of missing important business concerns that the surveyors could identify in the field.

Business owners also had the option of either being interviewed by SUNY Geneseo students or completing the survey online at a more convenient time. Completed interviews were obtained from 53 of the more than 100 local business owners visited and represented a wider range of business types than originally anticipated.

Tourism Official Survey

Telephone interviews were conducted with six county and local travel and tourism officials representing several of the 14 counties through which the ECT passes. The objective was to obtain another qualitative perspective of the nature of impacts attributed to the current marketing of the ECT and Erie Canal and, more generally, the number of trail users and how much money they spend locally while they use the trail.

CHAPTER 3: FINDINGS AND RESULTS

Estimated Annual Trail Traffic Volume

The Erie Canalway Trail is estimated to have an annual trail traffic volume of more than 1.58 million persons. Not surprisingly the segments of the trail closest to the large population centers of Buffalo, Rochester and Albany (segments 1, 4 and 13, respectively) account for the most trail traffic volume, while the more rural segments of the trail receive less use. Annual trail traffic volume for each segment and the ECT as a whole is provided in Table 1.

Table 1: Estimated Annual Trail Traffic Volume by Segment

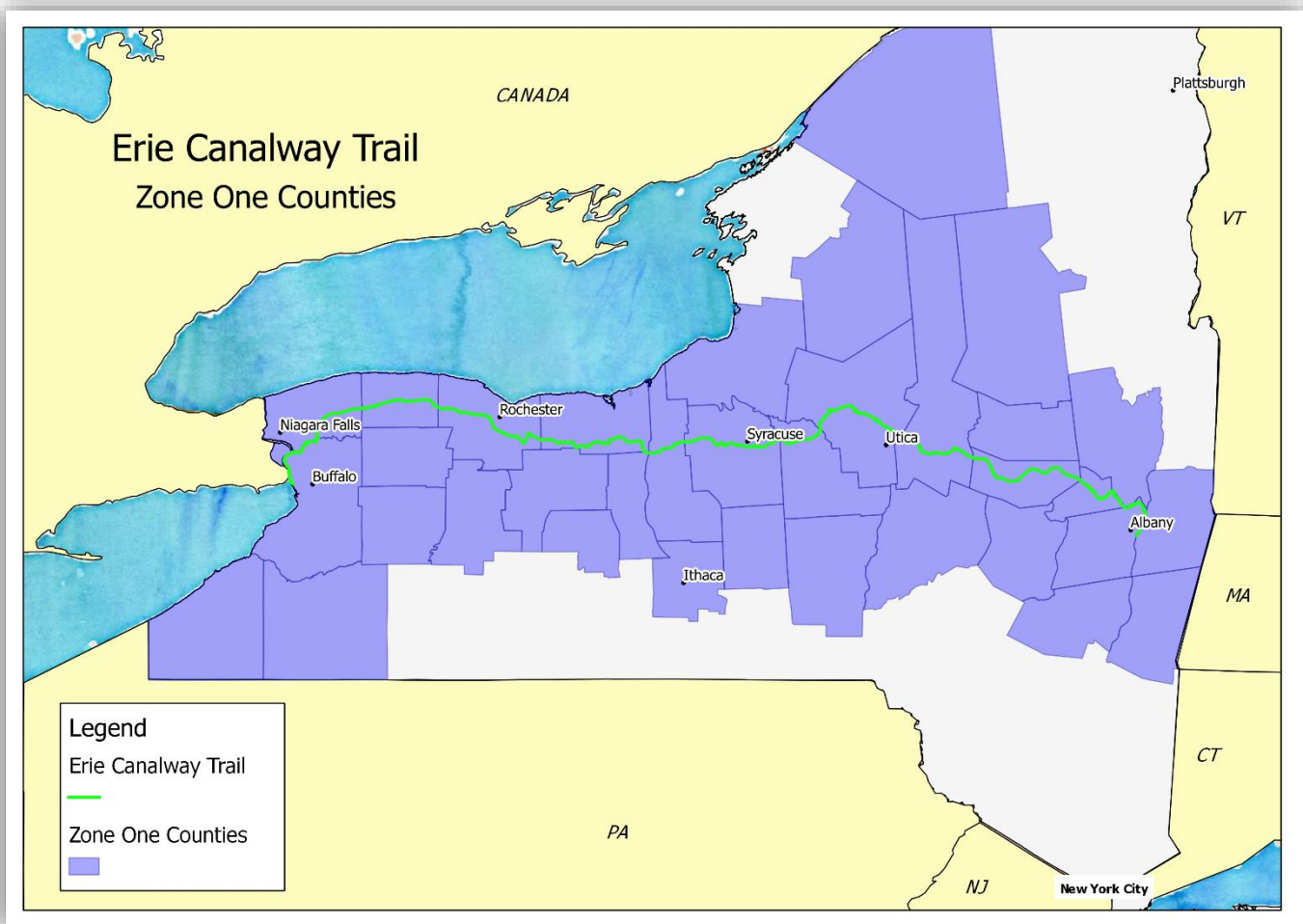
Trail Segment	Trail Count Locations	Estimated Annual Trail Traffic Volume
1 - Buffalo waterfront to Pendleton	Niawanda Park, City of Tonawanda, Erie County	359,177
2 - Lockport to Albion	Widewaters, City of Lockport, Niagara County	46,674
3 - Albion to Rochester west of the Genesee River	Henpeck Park, Town of Greece, Monroe County	83,954
4 - Rochester east of the Genesee River to Newark	Lock 33, Town of Brighton, Monroe County Schoen Place, Village of Pittsford, Monroe County Perinton Park, Village of Fairport, Monroe County Bushnell's Basin, Town of Perinton, Monroe County Whitbeck Road, Town of Arcadia, Wayne County	220,984
5 - Port Byron to Camillus	Nine Mile Creek Aqueduct, Town of Camillus, Onondaga County	134,089
6 - DeWitt to Oneida	Cedar Bay Park, Town of Dewitt, Onondaga County	66,260
7 - Oneida to Oriskany	*	42,882
8 - Oriskany to Utica	Lock 20 Park, Town of Marcy, Oneida County East side of Genesee Street, City of Utica, Oneida County	52,744
9 - Mohawk to Canajoharie	Village of Fort Plain, Montgomery County Village of Canajoharie, Montgomery County	68,983
10 - Canajoharie to Amsterdam	*	42,882
11 - Amsterdam to Schenectady	Schenectady Community College, City of Schenectady, Schenectady County	42,882
12 - Schenectady to Cohoes	Lions Park, Town of Niskayuna, Schenectady County	178,042
13 - Cohoes to Albany	Corning Preserve, City of Albany, Albany County	240,782
Total Trail Visits:		1,580,335

* The lowest actual trail traffic volume estimate, obtained at Schenectady Community College, was applied to the trail sections for which observational or automatic counter data could not be obtained

Spending

Survey results translate to an estimated \$210.6 million spent by ECT visitors each year.

As shown in Table 2, average spending per visit on the ECT is a function of the distance of the visitor's residence from the trail and whether the individual is a day or overnight visitor. For this reason, spending profiles were created for day and overnight visitors and two zones determined by the visitor's place of residence: within the 14 ECT or 21 adjacent counties (Zone One) or outside these 35 counties (Zone Two). As the spending questions in the survey asked respondents to describe their "total expenditures within one typical visit to the trail," for the purposes of this analysis these expenditures are assumed to describe the spending per person per visit, which may include a single or multiple days.



As Table 2 demonstrates, Zone One day users spend \$26.37 per person per visit on average, Zone One overnight users spend \$531.47 per person per visit on average and Zone Two overnight users spend on average \$1,128.39 per person per visit. The amount of visitation from each user type (81.75% from Zone One day users, 15.77% from Zone One overnight users and 2.48% from Zone Two users) results in a *weighted* average of \$133.31 of spending per person/visit.



As shown in Table 3, trail users who included an overnight stay in their trail visit constitute 18.25% of the total volume of visits to the trail. However, their impact is significant as those visits represent 84% of the overall spending.

While it may initially seem surprising that Zone One overnight users represent almost 16% of all trail visits, Zone One encompasses 35 of New York's 62 counties so some residents of Zone One could live 50 miles or more from the section of trail closest to their home. In addition, these results may represent Zone One residents who live very close to the trail but, when interviewed, were visiting a more distant section of trail that required a stay overnight.

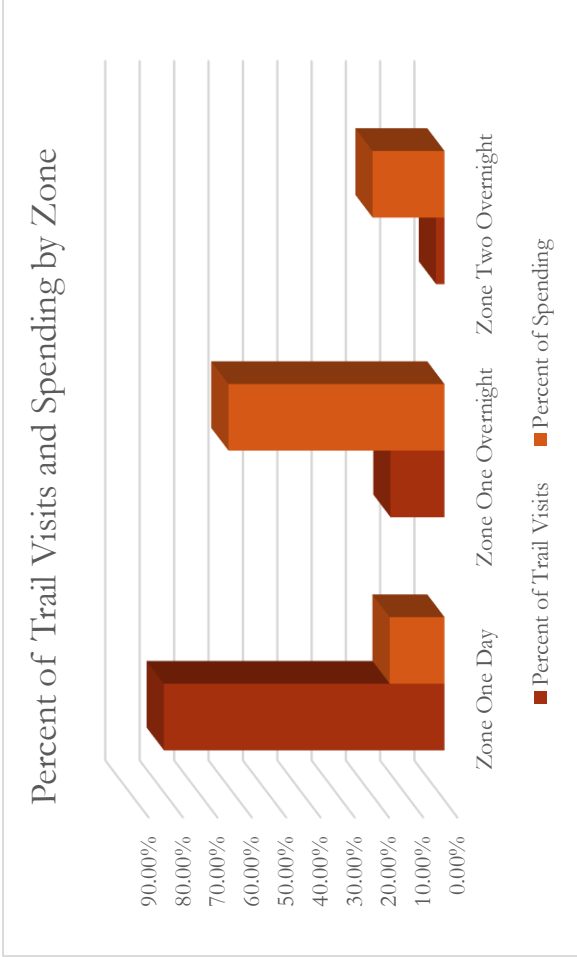
A focus on increasing the number of overnight visitors to the ECT could generate significant economic benefits for ECT communities as they spend more than twenty times that of day visitors. Suggested or themed itineraries, package trips planned by a group of lodging establishments, fully supported rides, additional marketing targeted directly to cycling tourists, and a cyclists welcome designation may increase the number of out of town visitors and entice those who live within ECT and adjacent counties to include an overnight stay in their trail visit.

Table 2: Spending Profiles per Visit per Person by Zone

Visit Type	Motel, hotel, cabin or B&B	Camp fees	Restaurant & bars	Grocery take-out food/drinks	Gas & oil	Other vehicle expense	Local transportation	Admissions & fees	Clothing	Sporting goods	Gambling	Souvenirs and other expenses	Total Spend
Zone 1 Day	\$0.00	\$0.00	\$12.44	\$3.25	\$4.10	\$0.47	\$0.12	\$0.31	\$4.15	\$0.95	\$0.00	\$0.58	\$26.37
Zone 1 Overnight	\$177.50	\$29.13	\$160.47	\$37.81	\$41.56	\$10.94	\$1.25	\$11.88	\$25.63	\$14.06	\$0.00	\$21.25	\$531.47
Zone 2 Overnight	\$480.86	\$54.58	\$297.97	\$94.77	\$70.23	\$8.91	\$11.64	\$20.00	\$20.23	\$22.80	\$3.13	\$43.28	\$1,128.39
Total Weighted Average Spending													
Total Weighted Average Spending	\$39.90	\$5.94	\$42.85	\$10.97	\$11.64	\$2.33	\$0.58	\$2.62	\$7.94	\$3.56	\$0.08	\$4.90	\$133.31

Table 3: Spending and Visits by Segment

Zone	Number of Trail Visits	Percent of Trail Visits	Direct Spending (\$)	Percent of Spending
Zone One Day	1,292,031	81.75%	\$34,063,632	16%
Zone One Overnight	249,152	15.77%	\$132,388,646	63%
Zone Two Overnight	39,152	2.48%	\$44,169,698	21%
TOTAL	1,580,335	100%	\$210,621,976	100%



Estimated Annual Economic Impact

Overall (including direct and secondary effects), ECT visitor spending generates approximately \$253 million in sales, 3,440 jobs, \$78 million in labor income and \$28.5 million in taxes in the local economy each year. For the purpose of this study, the local economy, as defined by the MGM models, includes the 14 counties where the ECT is located and the surrounding counties where visitors stay overnight and spend their money.

Table 4 below demonstrates the economic impacts of ECT user spending, including direct and secondary effects to sales, jobs, and labor income.

Table 4: Economic Impacts of Trail Visitor Spending; Direct and Secondary Effects

Sector/Spending Category	Sales	Jobs	Labor Income
Direct Effects			
Motel, hotel cabin or B&B	\$63,051,000	743	\$15,437,000
Camping fees	\$9,393,000	122	\$2,896,000
Restaurants & bars	\$67,720,000	1,309	\$21,961,000
Admissions & fees	\$4,145,000	88	\$1,166,000
Gambling	\$122,000	3	\$34,000
Other vehicle expenses	\$3,675,000	46	\$1,851,000
Local transportation	\$922,000	20	\$476,000
Grocery stores	\$4,386,000	80	\$2,140,000
Gas stations	\$4,102,000	47	\$1,669,000
Other retail	\$11,017,000	217	\$5,086,000
Wholesale Trade	\$3,489,000	25	\$1,279,000
Local Production of goods	\$2,023,000	3	\$131,000
Total Direct Effects	\$174,046,000	2,703	\$54,126,000
Secondary Effects (Indirect And Induced)			
Total Secondary Effects	\$79,007,000	737	\$23,933,000
Total Effects (Direct and Secondary)			
Total Effects	\$253,053,000	3,440	\$78,058,000
Multiplier			
Multiplier	1.45	1.27	1.44

Sales

While overall ECT visitor spending is estimated to be \$210.6 million, the direct economic impacts of that spending are estimated to be \$174 million in sales as not all ECT user spending is captured as direct sales to the local economies of the ECT. Some ECT visitor spending is realized as direct sales to more distant economies outside of the ECT region. As shown in Table 4, ECT visitor spending results in a secondary impact (indirect and induced) of \$79 million in sales and a total economic impact of \$253 million. The secondary impacts are based on a spending multiplier of 1.45 which means that for every dollar spent during a visit to the ECT, an additional average of 45 cents worth of economic activity is felt within the local economy, impacting secondary support industries which provide services to the businesses utilized by trail users.

As Table 5 illustrates, the impact of lodging and restaurant expenditures is significant. Together lodging (including camping) and restaurants represent 80% of all ECT visitor expenses. No other spending category is greater than 6% of total sales.

Table 5: ECT Visitor Spending Categories by Percent of Total Sales

Spending Category	Percent of total sales
Motel, hotel cabin or B&B	36%
Camping fees	5%
Restaurants & bars	39%
Admissions & fees	2%
Gambling	0%
Other vehicle expenses	2%
Local transportation	1%
Grocery stores	3%
Gas stations	2%
Other retail	6%
Wholesale Trade	2%
Local Production of goods	1%

Jobs

As Table 4 demonstrates, the *MGM2 model* predicts that visitor spending in and around the ECT supports an estimated 3,440 jobs. This includes 2,703 jobs attributable directly to ECT spending and, with a job multiplier of 1.27, 737 jobs due to indirect and induced effects of this spending. Jobs estimates include both full-time and part-time positions. Seasonal jobs are calculated on an annual basis (i.e., 4 jobs for 3 months equals one job on an annual basis).

Labor Income

The *MGM2 model* also predicts that trail visitor spending in and around the ECT generates an estimated \$78 million in wages and salaries. This includes \$54.1 million in wages and salaries paid to persons working in businesses directly serving ECT visitors and, with a multiplier of 1.44, \$23.9 million in wages and salaries paid to workers in other companies in the region that supply businesses directly providing goods and services to ECT visitors as well as households re-spending income earned from ECT visitor spending.

Tax Impacts

Added to these effects are the tax dollars created at the federal, state and county level. As shown in Table 6, a total of \$9.3 million in local sales taxes is brought into the local economy, while New York State collects another \$7.7 million in sales tax revenue from spending directly related to the ECT. In addition, \$7.9 million in federal income taxes and \$3.5 million in state income taxes is generated by ECT-related spending for a total of \$28.5 million in tax dollars attributed to ECT visits by Zone One and Two residents.

Table 6: Tax Impacts of Direct Sales and Income

	Sales	Income	Total
Federal	\$0	\$7,902,000	\$7,902,000
State	\$7,745,000	\$3,518,000	\$11,263,000
Local	\$9,294,000	\$0	\$9,294,000
Total	\$17,039,000	\$11,421,000	\$28,460,000

Impact of Zone Two Residents

As the Erie Canalway Trail traverses a large portion of upstate New York between Buffalo and Albany, the local economy surrounding the trail is made up of a number of smaller, distinct regional economies. Although some spending by Zone One trail users visiting sections of the ECT in other parts of the state might represent new money, the most conservative estimate of new money entering the local economy considers only the spending undertaken by the 39,152 Zone Two residents (2.48% of the estimated annual trail visits).

The average expenditure per person per visit for Zone Two residents amounts to \$1,128, including accommodations, restaurants, transportation, and souvenir expenditures, and other miscellaneous expenses, as categorized according to Stynes' methodology. As Table 7 demonstrates, spending by Zone Two residents represents 21% of all spending associated with the ECT and amounts to \$38.2 million in new direct effects to sales in the local ECT economies. By combining a multiplier effect of 1.46, it results in \$55.8 million in new direct and secondary spending effects within the local regional economies. This new money also creates approximately 731 jobs and \$16.7 million in labor income in the local economies of the trail.

Table 7: Economic Impacts of Zone Two User Spending; Direct and Secondary Effects

Sector/Spending Category	Sales	Jobs	Labor Income
Direct Effects			
Motel, hotel cabin or B&B	\$18,823,000	222	\$4,608,000
Camping fees	\$2,136,000	28	\$659,000
Restaurants & bars	\$11,664,000	225	\$3,782,000
Admissions & fees	\$783,000	17	\$220,000
Gambling	\$122,000	3	\$34,000
Other vehicle expenses	\$349,000	4	\$176,000
Local transportation	\$456,000	10	\$235,000
Grocery stores	\$939,000	17	\$458,000
Gas stations	\$613,000	7	\$249,000
Other retail	\$1,483,000	29	\$680,000
Wholesale Trade	\$533,000	4	\$196,000
Local Production of goods	\$342,000	1	\$25,000
Total Direct Effects	\$38,242,000	567	\$11,323,000
Secondary Effects (Indirect And Induced)			
Total Secondary Effects	\$17,569,000	165	\$5,356,000
Total Effects (Direct and Secondary)			
Total Effects	\$55,811,000	731	\$16,679,000
Multiplier			
Multiplier	1.46	1.29	1.47

As Zone Two residents presently represent only 2.48% percent of annual trail visits, there is ample opportunity to grow this market segment.

Considerations for Future Study

While this study generated considerable new data on spending and usage patterns of visitors to the ECT, it illustrated the following three factors which may actually have contributed to an underestimate of the ECT's true economic impact as well as ways in which future studies could be modified to make data collection more comprehensive and precise.

Trail Length

As one of the longest multi-use trails in the nation, the sheer length of the ECT presents a significant challenge for data collection. Observations were made at as many count locations as possible, but data from each segment was generally obtained from only one location. Two segments did not include any observations. Future study could include additional count locations or use additional electronic trail counters, which would allow for more comprehensive and continuous monitoring of the trail and provide a richer and more accurate data set.

Sampling Period

Surveys and observational counts were conducted for the present study between July and September 2012. Because the survey period was June to September, trail users may not have included information about visits to the trail they might make during other seasons of the year especially during the winter. Nevertheless, as survey spending questions were not specific to the season of use, spending values are assumed to be homogenous throughout the year. The data collected amongst persons who indicated they use the trail for skiing and snowmobiling corroborated this hypothesis, giving reasonable confidence as to its veracity. However, future survey results may be improved by conducting trail user surveys in all seasons of the year.



The limited sampling period is also not expected to impact the accuracy of the annual visitation numbers as Lindsey's methodology includes monthly coefficients that are based on more than three years of continuous, all season annual monitoring of trail use. In addition, the calculated monthly estimate for each count location was entered in the Lindsey 2 Model as an estimate for July – Lindsey's highest traffic month. This resulted in the most conservative estimates for annual trail traffic because it assumes the recorded count observations represent the highest traffic that may be experienced throughout the year, even though some counts were obtained in June, August, and September, months not likely to represent the highest monthly traffic volume.

Under-representation of Zone Two

A third factor possibly affecting estimation of economic impact is that Zone Two trail visitors are quite likely under-represented within the sample. Conceptually, this is unsurprising, since people who are away from home on vacation may be less likely to want to waste precious time filling out surveys in person, or even be waylaid on the trail. Also, as 85% of Zone Two trail visitors were bicycling, it may have been more difficult for surveyors to get the attention of bicyclists.

Even if they heard the invitation of the surveyor, they may have been reluctant to stop cycling to participate.

Systematic regression analyses have shown that there are marked differences in the spending levels which are attributable to the zone a visitor comes from, controlling for all other co-varying factors, including age, income, and education. Thus, a sample which neglects to contain a representative proportion compared to the actual ECT population would inherently underestimate, by a large percentage, the true impact of the ECT visitor on the New York State economy. Furthermore, modest shifting of the zone membership equilibrium would have drastic effects on the average expenditure per visit.

Potential underrepresentation of Zone Two is also important because dollars from Zone Two visitors reflect money that would unlikely have otherwise been spent in the local ECT economy. Zone Two residents, for example, spend more than twice as much as Zone One overnight users and more than 42 times Zone One day users, each time they visit the trail.

Well-designed “trail survey ahead” signs, surveyors clearly identified with colorful shirts and/or caps that say “trail surveyor,” and survey locations where cyclists need to naturally reduce their speed may encourage more Zone Two trail users to participate. In addition, within the communities where surveys are taking place local newspapers could include articles about the survey and its importance and local businesses could display signs with messages about joining in the effort.

Comparisons to Other Trail Studies

The results and findings of this study naturally generate questions about how the data compares to existing information for the ECT and other trails of similar length and environment. One of the reasons this study was undertaken was because there are so few comparable, relatively current studies of similar trails and so little existing spending data specific to the ECT.

In 2008, the New York State Office of Parks, Recreation and Historic Preservation (NYS OPRHP) undertook a study of spending for eight shared-use trails in the state. Two locations on the ECT were included in this effort, Lock 32 in Pittsford in western New York and Lions Park in Niskayuna in the Capital Region. However, the study did not include trail counts and the survey design, data collection, and analysis were different enough from the present study to make spending comparisons difficult.¹²

In 2008, the New York State Canal Corporation’s study of canal tourism included an estimated economic impact of \$41.6 million for day use visitors defined as “casual day visitors to Canalway trails.”¹³ These estimates were based on extrapolation of limited data sets for trail traffic volume and an average per person spending derived from other non-New York State and shorter trails, not the comprehensive on-site data collection and separation of data by location of ECT visitor residence that is the hallmark of this present work.

The most relevant study for comparison is the economic impact report completed for Missouri's 240-mile Katy Trail in 2012.¹⁴ The Katy Trail is of similar length and is surrounded by a primarily rural environment, not unlike some sections of the ECT. It too used the *MGM2 model* to estimate economic impact.

However, there are differences that may explain why the ECT registered more than 13 times the economic impact (\$18.5 million vs. \$253 million). First, visitation to the Katy Trail is assumed to be 400,000. The study presents the usage as an assumption, not a number derived from actual trail counts. It should be noted that the usage assumed for the Katy Trail represents only one-fourth of the number of visits projected for the ECT.



Local day visitors to the Katy Trail, equivalent to ECT Zone One day users, are reported to spend \$11.33 per person/visit, 43% of what ECT day visitors spend (\$26.37). Overnight visitors to the Katy Trail staying in motels, hotels or B&Bs spend \$297.30 per person/visit. Campground visitors spend \$141 per person per visit. A weighted average of spending by all overnight visitors to the ECT (from both Zone One and Zone Two) equals \$612.53, about twice as much as the hotel/motel/B&B visitors to the Katy Trail.

For another long-distance trail, Pennsylvania's 141-mile Great Allegheny Passage Trail, a 2008 study found overnight visitors spend an average of \$98 per person a day, while local trail users and those engaged in a day trip spend an average of \$13 per person.¹⁵ Spending figures for this trail were reported per day, not per visit.

Some of the difference in spending by overnight visitors may be because 40% of overnight visitors to the Katy Trail stay in campgrounds while only 20% of ECT overnight visitors choose this less expensive form of lodging. Along the Katy Trail, there are established public and private camping areas that are always open, located at about 35-mile intervals. Similarly, for the Great Allegheny Passage Trail, 29.6% of survey respondents chose to stay in campgrounds, the accommodation type most frequently cited by trail users.¹⁶ For the ECT, while there are a few established campgrounds and informal camping opportunities provided at canal locks, camping is not as readily available.

As lodging is such a major element of overall spending, some of the difference could also be explained by the number of nights that trail visitors spend on the trail. For survey respondents who indicated they were vacationing along the ECT and staying overnight as part of that visit, the average number of nights they reported staying away from home was 6.19. For the Great Allegheny Passage Trail and the Katy Trail, overnight visitors stayed an average of 2.4 and 2.5

nights, respectively.¹⁷ This represents about 2.5 times more overnights for the ECT, which could contribute to the ECT's higher spending per visit.

CHAPTER 4: TRAIL USER SURVEY RESULTS

Introduction

To learn more about trail user demographics, lifestyle preferences, nature of ECT use, and trail-related spending habits, survey responses were obtained from 562 adults that included trail users intercepted on the trail and those who had purchased PTNY's cycling guide and had used the trail within the last year.

In many cases, responses to survey questions were further separated by zone of residence to determine if there were differences between the more local trail user and someone who had traveled a longer distance for a trail visit. As described in Chapter Two, Zone One includes 35 New York State counties: the 14 counties where the ECT is located and the 21 counties adjacent to these 14 counties. Zone Two includes the state's other 27 counties and all locations outside New York State.

Where relevant, survey responses were compared to results obtained from previous studies of other trails, such as a NYS Office of Parks, Recreation and Historic Preservation (OPRHP) 2008 study of NYS rail trails which included two locations on the Erie Canalway Trail and a Rails to Trails Conservancy comparison study of 14 Northeast rail trails. Of greatest relevance were the studies of other long-distance trails including Pennsylvania's 138 miles of D&L Trail; the 141-mile Great Allegheny Passage Trail, connecting Cumberland, Maryland and McKeesport, Pennsylvania; and Missouri's 240-mile Katy Trail.¹⁸



Demographics

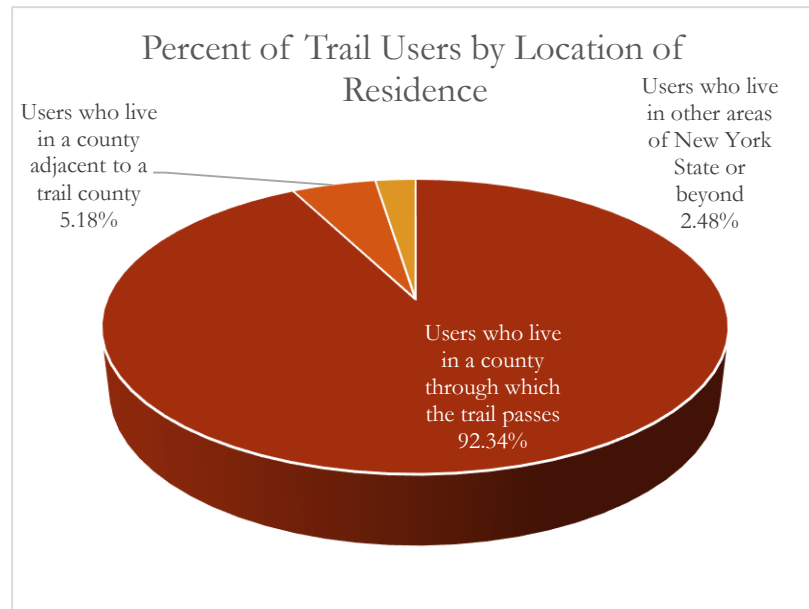
Residence – primarily local

Question 1: What is your zip code? (Zip codes were aggregated to determine county of residence)

Location of Residence of Trail Users

Zone		Percent
Zone One	Users who live in a county through which the trail passes	92.3%
	Users who live in a county adjacent to a trail county	5.2%
Zone Two	Users who live in other areas of New York State or beyond	2.5%
Total		100.00%

n= 444



Findings

Usage of the ECT is primarily local. In accordance with most previous trail studies, local is defined as living within one of the counties immediately adjacent to the trail. The majority of survey respondents (92.3%) resided in one of the 14 counties where the trail is located. Another 5.2% lived in one of the 21 counties adjacent to the ECT counties. As previously stated, these 35 counties were defined as Zone One. Another 2.5% of those surveyed lived in 21 states and six other NYS counties. These individuals were defined as representing Zone Two.

Distance of Residence From Trail Section Visited – 5 miles or less

Question 2: Roughly, how far away from the part of the trail you visited, do you live?

Percent of Trail Users by Distance of Residence to Trail

Distance From the Part of the Trail Visited	Percent
5 miles or less	50%
Between 6 and 10 miles	17%
Between 11 and 15 miles	6%
Between 16 and 20 miles	3%
Between 20 and 30 miles	2%
Between 30 and 40 miles	3%
Greater than 40 miles	20%

n = 557

Findings

Half of survey respondents were very local as they lived five miles or less from the trail. Two-thirds lived within 10 miles. Only 20% lived 40 or more miles from the trail.

These results indicate that the ECT has not yet become a destination trail such as the Katy Trail where 67% of visitors were classified as nonlocal, which that study defined as traveling more than 30 miles to reach the trailhead. On average, nonlocal users of the Katy Trail traveled 83 miles to reach a trailhead.

Gender – majority male

Question 3: My gender is . . .

Gender of Trail Users

Gender	Percent
Male	57%
Female	43%

n=550



Findings

Survey respondents were 57% male and 43% female. The gender split is similar to that found in other studies. Results of the 2008 NYS OPRHP survey of ECT users at Niskayuna's Lions Park found that 54.5% of trail users were male but in Pittsford 61% were male. In the 2012 study of Pennsylvania's D&L Trail 55.5% of trail users were male. The Rail to Trails Conservancy's 2009 comparison study of 14 Northeast rail trails also found that gender percentages varied about 10% or less from 50-50 with 55% male being very common. These gender splits, however, are very different from the Katy Trail where 75% of survey respondents were male and the Great Allegheny Passage Trail where 65.1% of trails users surveyed were male.

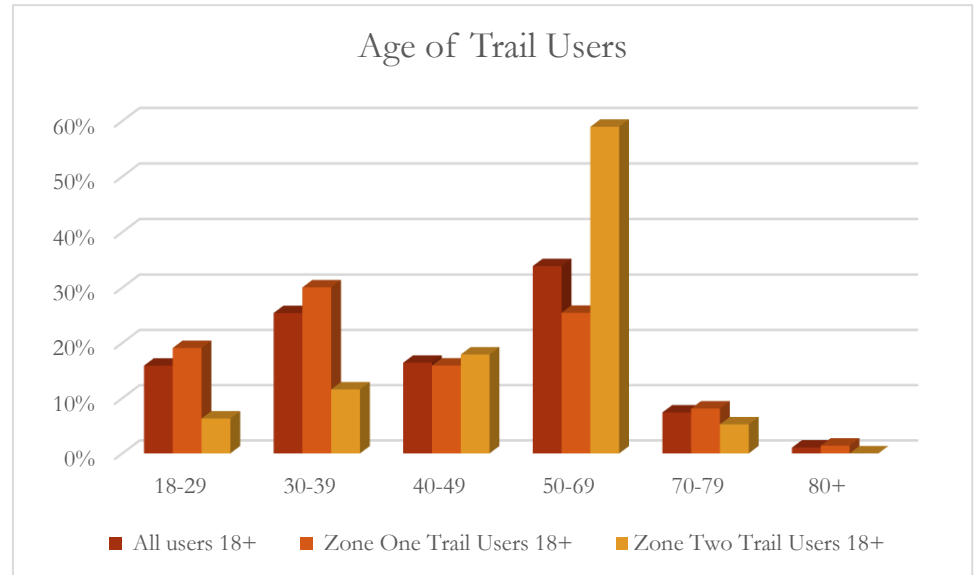
Age – Generation X

Question 4: My age is . . .

Age of Trail Users

Age Cohort	Percent
18-29	16%
30-39	25%
40-49	16%
50-69	34%
70-79	7%
80+	1%

n =378



Findings

The greatest percent of trail users (41%) belonged to Generation X (30-49). Baby Boomers (50-69) represented 34% of trail users. Less than half (41%) of those surveyed were under 40 years of age.

When separated by zone of residence, the usage by a younger demographic is noteworthy. Of Zone One respondents, 30% were 30-39 years old and almost half (49%) were between 18 and 39. Yet, only 18% of Zone Two residents were 40 years of age or less. The 77% of Zone Two residents aged 40 to 69, including 59% between 50 and 69, likely represents the retirees and mature adults that other studies have found often engage in short and long-distance bicycle trips.¹⁹

Household Income – average

Question 5: My approximate annual household income is . . .

Percent of Trail Users by Household Income

Household Income	Percent of ECT Users	Percent NYS Households
Less than \$10,000	2%	8%
\$10,000 - \$24,999	4%	15%
\$25,000 - \$34,999	8%	9%
\$35,000 - \$49,999	20%	12%
\$50,000 - \$74,999	24%	17%
\$75,000 - \$99,999	14%	12%
\$100,000 - \$149,999	16%	14%
\$150,000 - \$199,999	6%	6%
\$200,000+	6%	7%

n = 453

Findings

The majority of trail users (58%) reported a household income of less than \$75,000. About one-quarter of survey respondents (24%) have a household income within the category that contains the state's 2012 median household income of \$57,683. Another 42% reported household incomes of \$75,000 and above, including 6% between \$150,000 and \$199,000 and 6% at \$200,000 or greater.

As such a large percentage of trail users were New York State residents, the household income data was compared to census data on household income for New York State. There is little difference in the percentage of trail users and all New Yorkers with household incomes greater than \$75,000. However, more trail users (44%) are in the middle household income categories (\$35,000 to \$ 74,999) than all New York residents (29%). For the lower income levels, the difference is even more pronounced: 14% of trail users reported household incomes of \$34,999 or less while 32% of all New York State households have incomes of \$34,999 or less.

The 28% of ECT users who reported household incomes above \$100,000 is more than what was found for the Great Allegheny Passage Trail where 21% of those surveyed reported earning more than \$100,000 per year, but less than that found for the Katy Trail where 34% of trail users reported an annual income of \$100,000 or more.

Educational Level – well educated

Question 6: What is your highest level of education?

Percent of Trail Users by Educational Attainment

Highest Level of Education	Percent
Less than high school diploma	1%
High School Diploma	5%
Some College	15%
Two Year Degree	15%
Four Year Degree	37%
Graduate or Professional Degree	28%

n = 545

Findings

Almost two-thirds of survey respondents reported having either a four-year degree (37%) or a graduate or professional degree (28%). Another 30% reported a two-year degree or some college. Only 6% reported a high school degree or less. Most other studies did not ask questions about educational attainment, but similar results were found for the Katy Trail where 31% of respondents had completed a four-year degree and 27% had completed a graduate degree.

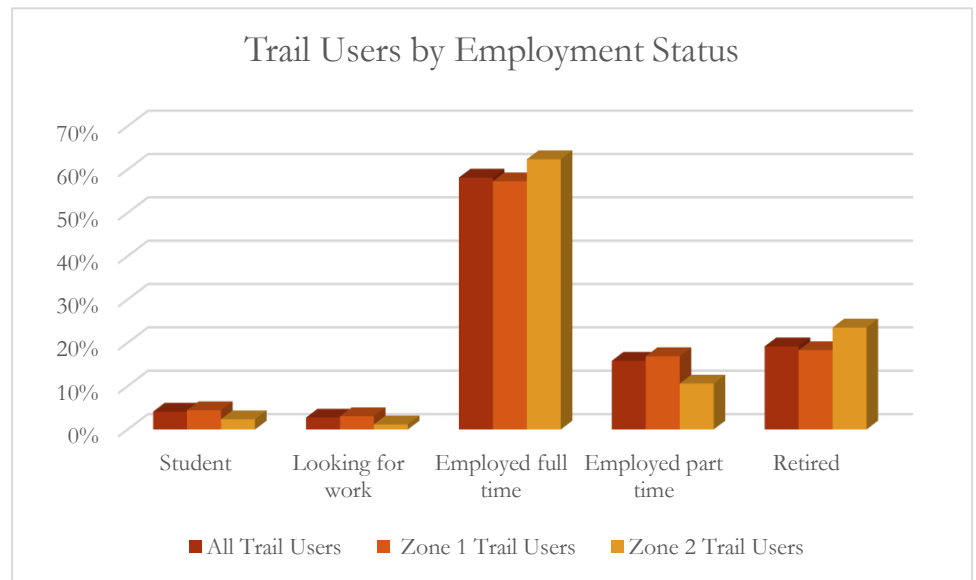
Employment – employed

Question 7: My current work status is...

Percent of Trail Users by Employment Status

Employment Status	Percent
Student	4%
Looking for work	3%
Employed part-time	16%
Employed full-time	58%
Retired	19%

n = 553



Findings

Nearly three-quarters of survey respondents work either full-time (58%) or part-time (16%), 19% are retired, 3% are looking for work and 4% are students. When the responses were split by zone of residence, the percentage of retired and full-time workers increased slightly for Zone Two.

In the 2008 study of two ECT locations, the number of full-time employed trail users was similar but more trail users were retired. At Lions Park in Niskayuna, 56.3% of ECT users were employed full-time and 27.8% were retired. Of those completing surveys at Pittsford, 52.3% were employed full-time and 23.1% retired. The changed economic circumstances may reflect the lower number of retirees in 2012.

Interests

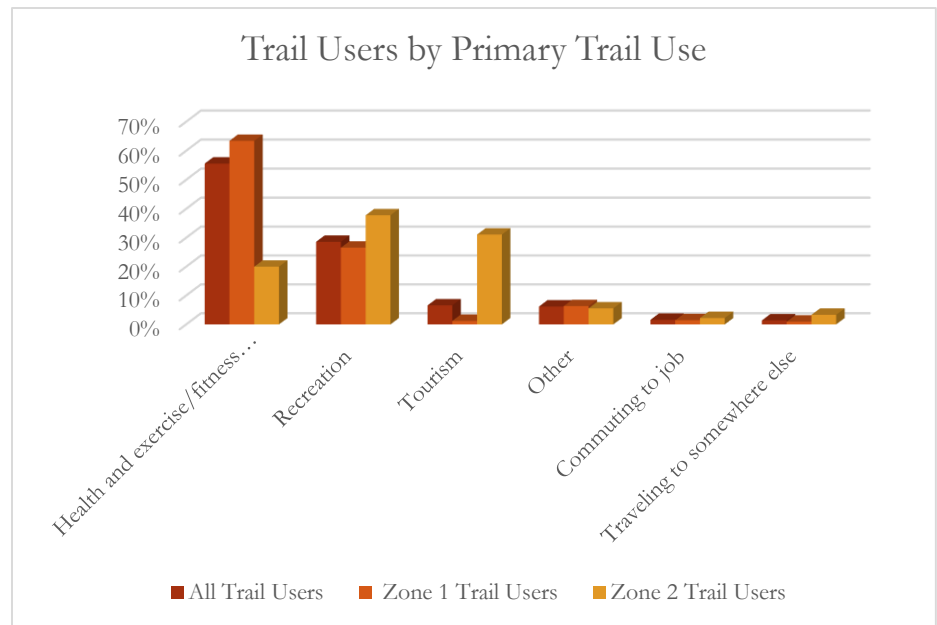
Main Reason for Trail Use – health, exercise and fitness

Question 8: Would you consider your use of the trail to be primarily for: (choose one)

Percent of Trail Users by Primary Trail Use

Motivation for Trail Use	Percent
Health, exercise and fitness training	56%
Recreation	29%
Tourism	7%
Other	6%
Commuting to job	2%
Traveling to somewhere else	1%

n = 500



Findings

Health, exercise and fitness training was the motivation for using the ECT mentioned by the greatest percentage of trail users (56%), followed by recreation (29%), tourism (7%), and commuting to a job 2%. The 1% that indicated they were traveling to somewhere else may represent those persons using the ECT for transportation which did not involve commuting to a job.

Directionally, these results mirror those found for the 2008 survey of users of eight NYS trails where health and exercise was also the main reason for trail use, selected by 60.5% of survey respondents. In that same study, 65.5% of users of the ECT at Pittsford chose health and exercise as their main reason for trail use. However, at Lions Park in Niskayuna, only 50.4% of trail users cited health and exercise as the main reason for trail use.

As the number of respondents who indicated they used the trail for commuting was very small, it is difficult to draw any conclusions about this type of trail use. Only 2% said they used the ECT for commuting. Nevertheless, it is helpful to know that 42% commute one to five miles, 34% travel 11 or more miles, and 25% commute six to 10 miles.

Dividing responses by zone of residence reveals 63% of Zone One respondents are using the trail for health and exercise and only 1% for tourism. For Zone Two residents who are coming to the trail from outside the ECT and surrounding counties, recreation was the most popular reason for using the trail (38%). As might be expected of Zone Two residents, the percentage of respondents who indicated they were using the trail for tourism was much greater (31%) and the percentage using the trail for health and exercise was substantially less (20%) than Zone One residents.



The reasons for trail use are also similar to those for local users of the long-distance Great Allegheny Passage Trail where 60.7% of locals (defined as living in a trailhead zipcode) indicated health, exercise and fitness and 37.2% cited recreation as the main reasons for visiting the trail. Health was the major reason stated for visiting the D & L Trail and for trail visits to 10 of the 14 Northeast trails included in the 2009 Rails to Trails Conservancy study. These results confirm the assumption, presented by the Rails to Trails Conservancy study, that health is usually the reason given for visiting a local community trail while recreation is usually the primary reason for visiting a destination trail. While the ECT is a long-distance trail, reason for usage again confirms that it has not yet attained the deserved recognition as a destination trail.

50+ Mile Bike Trips – somewhat to very interested

Question 9: How interested would you be in biking along a significant (greater than 50 miles) portion of the trail?

Percent of Trail Users by Interest in Biking Along a Significant Portion of the Trail

Level of Interest	Percent
Not at all interested	11%
Not very interested	21%
Somewhat interested	28%
Very interested	41%

n = 432

Findings

Survey respondents were also asked their level of interest in biking along a significant (50+ mile) portion of the trail. More than two-thirds of those responding to the question indicated they were very (41%) or somewhat (28%) interested while 32% were either not very or not at all interested in such an excursion. These results indicate potential markets for developing self-led or organized ECT trips.

Multi-Day, Organized Bicycling Trips – interested in such an excursion

Question 10: There are a number of organizations, including our client Parks & Trails New York, that organize multi-day bicycling trips along the trail. Which of the answer categories below best describes your experiences with or interests in such bicycling excursions. Please choose only one of the following.

Percent of Trail Users by Interest in an Organized Ride

Interest in an Organized Ride	Percent
Could not at this time take such a trip	38%
Have not taken such a trip before but would be interested in one	42%
Have taken such a trip before and hope to again	19%
Have taken such a trip before and probably won't again	1%

n = 511

Percent of Trail Users Who Have Not Taken Such a Trip Before But Would be Interested in One by Age

Age Cohort	Percent
18-29	23%
30-39	26%
40-49	24%
50-69	24%
70-79	4%
80+	0%

n = 140

Percent of Trail Users Who Have Not Taken Such a Trip Before But Would be Interested in One by Zone

Zone	Percent
One	89%
Two	11%

n = 213

Percent of Trail Users Who Have Not Taken Such a Trip Before But Would be Interested in One by Household Income

Household Income	Percent
Less than \$10,000	4%
\$10,000 - \$24,999	2%
\$25,000 - \$34,999	9%
\$35,000 - \$49,999	20%
\$50,000 - \$74,999	24%
\$75,000 - \$99,999	14%
\$100,000 - \$149,999	15%
\$150,000 - \$199,999	6%
\$200,000+	6%

n = 190

Findings

Based on the responses received from trail users, there is interest in participating in organized cycling trips on the ECT. Nearly half of survey respondents (42%) said they had not been on such a trip, but were interested in taking one. Among the other 20% who had taken such a trip before, nearly all (19%) said they hoped to take another such trip in the future.

These responses indicate there is potential for private operators to develop a series of organized tours, much as has been done for the Great Allegheny Passage and Katy Trail. In addition to Parks & Trails New York's annual Cycling the Erie Canal tour held in early July, a few tour operators offer an occasional supported bike tour of the ECT, but there is significant room for further development of this market.



The data was split by zone of residence to see whether interest in participating in an organized ride along the ECT was greater among those living farther from the trail. Surprisingly, there is significant interest among persons who live in the 35 counties surrounding the ECT (Zone One). This represents an important, primarily untapped, local market for organized cycling trips on the trail.

Persons who are interested in but have never participated in an organized ride on the ECT have a different demographic profile than survey respondents who reported they were engaged in a vacation on the ECT. More than half (59%) of those who said they would be interested in a cycling trip on the ECT have a household income less than \$75,000 per year, 50% are of Generation X and almost half (49%) under 40 years of age.

Canal History - interested

Question 11: Please choose the appropriate response: I am interested in the history of the Erie Canal and specific historical spots along the trail.

Percent of Trail Users by Interest in Canal History

Response	Percent
Definitely Does	35%
Does Somewhat	44%
Not at all	4%
Not very well	17%

n = 497



Findings

As the history of the canal and the historical attractions surrounding it are of interest to almost 80% of survey respondents, it should be a prominent aspect of trail-related marketing efforts. These results also highlight opportunities for local historic sites and historic communities to undertake a direct appeal to the cycling tourist.

Well-being – positive effect

Question 12: Please choose the appropriate response: Overall, outdoor activities along the trail have had a very positive effect on me.

Percent of Trail User by Effect of Outdoor Activities Along the Trail

Response	Percent
Definitely Does	77%
Does Somewhat	22%
Not at all	0%
Not very well	2%

n = 502

Findings

Trail users recognize that their use of the ECT has had a positive effect on their well-being. Almost 100% said the trail “had a very positive effect on me,” including 77% who said that it definitely does. This benefit of the trail should also be part of the message associated with marketing efforts.

Nature of Trail Use

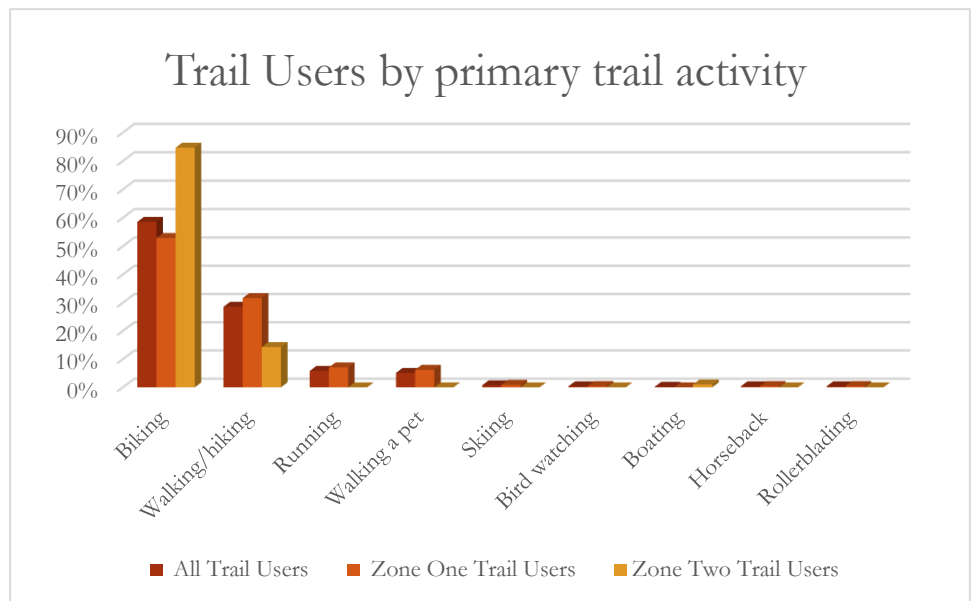
Activity – biking predominates

Question 13: What activities do you engage in along the trail? Of those you checked off, which is your most common activity on the trail?

**Percent of Trail Users
by Most Common Trail
Activity**

Trail Activity	Percent
Biking	59%
Walking/hiking	29%
Running	6%
Walking a pet	5%
Skiing	1%
Bird watching	< 1%
Boating	< 1%
Horseback	< 1%
Rollerblading	< 1%

n = 550



Findings

Biking was named by 59% of survey respondents as their primary trail activity, followed by walking/hiking (29%) and far behind by running/jogging (6%), walking a pet (5%), and skiing/cross-country skiing (1%). Adding those walking a pet and bird watching to the walking/hiking category brings the total percentage of walkers to about 34%. Boating likely represents persons who tied up their boats and were using the trail to visit canalside businesses and attractions.

Survey respondents also reported engaging in at least two activities along the trail with bicycling and walking being predominate.

The activity split for the ECT was closer to that found on the D&L Trail where just over 45% were bicycling and 30% were walking with another 7% each jogging and walking a dog. On other long-distance trails, bicycling is more popular. On the Katy Trail, most trail users were bicycling. Even

among local visitors, 72% were bicyclists while only 36% were walkers. On the Great Allegheny Passage Trail, 88.1% of users were bicycling. Only 14.5% were walking.

The greater popularity of walking on the ECT may be due to the large percentage of local, short-duration use and because many sections of the trail are readily accessible to community centers and neighborhoods.

Separating the responses by zone of residence clearly reveals that bicycling is the predominate activity for those who travel to the trail from a distance: 85% of Zone Two survey respondents cited bicycling as the most common activity they engage in along the trail. These results are similar to those from the Katy Trail where 90% of nonlocal visitors were bicycling while only 13% were walking.



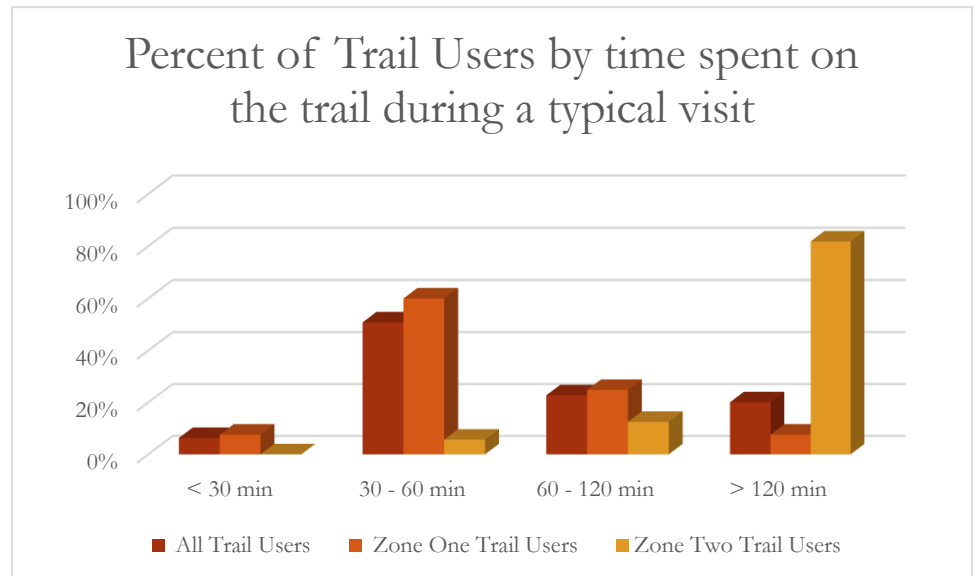
Time on Trail – 30-60 minutes per visit

Question 14: How much time do you spend on the trail during a typical visit?

Percent of Trail Users by Time Spent on the Trail

Time spent on trail	Percent
< 30 min	6%
30 - 60 min	51%
60 - 120 min	23%
> 120 min	20%

n = 550



Findings

More than half of survey respondents (51%) reported going out on the trail for 30 to 60 minutes. These results appear to represent shorter visits than found in the survey of ECT users conducted in 2008 where trail users at Pittsford and Niskayuna reported spending an average of 94 minutes on the trail in their last visit. The lower number of minutes spent on the trail may reflect the increase in percentage of walkers now using the resource.

The 20% of trail users who spend more than 120 minutes on the trail varies significantly from the longest time users spend on other trails. On the D & L Trail, 44% of those surveyed spent more than two hours on the trail and on the Schuylkill River Trail 49.7% of those surveyed spent one to two hours.²⁰

Splitting the data by zone reveals that local vs. non local use significantly affects time spent on the trail. Of those who live in Zone One, 60% spend between a half-hour and an hour per visit to the trail. Another 25% spend between one and two hours on the trail. However, almost all Zone Two residents (95%) spend at least one hour on the trail, including 82% that spend more than two hours on a typical visit.

Time Spent vs. Activity – little impact

Question 15: How much time do you spend on the trail during a typical visit?

Percent of Walkers by Time Spent on the Trail

Time spent on trail	Percent
< 30 min	5%
30 - 60 min	69%
60 - 120 min	21%
> 120 min	5%

n = 156

Percent of Bicyclists by Time Spent on the Trail

Time spent on trail	Percent
< 30 min	6%
30 - 60 min	39%
60 - 120 min	24%
> 120 min	31%

n = 289

Findings

The data was examined to determine if the time spent on the trail differed depending on the nature of the trail activity as walkers might be expected to spend less time on the trail than cyclists. The greatest percentage of walkers and bicyclists spent 30-60 minutes on the trail during a typical visit. A majority of walkers (69%) spent 30-60 minutes but another 21% indicated they spend much longer, one to two hours, which means they could walk for more than one to three miles in a visit.

The greatest number of cyclists (39%) also reported spending 30-60 minutes on the ECT during a typical visit. Yet for cyclists, time spent on the trail was more evenly distributed between 30 minutes and more than two hours. However, the percentage of cyclists who spend greater than two hours on the trail is six times that of walkers, which supports the assumption that most of the long-distance trail use is undertaken by bicyclists.

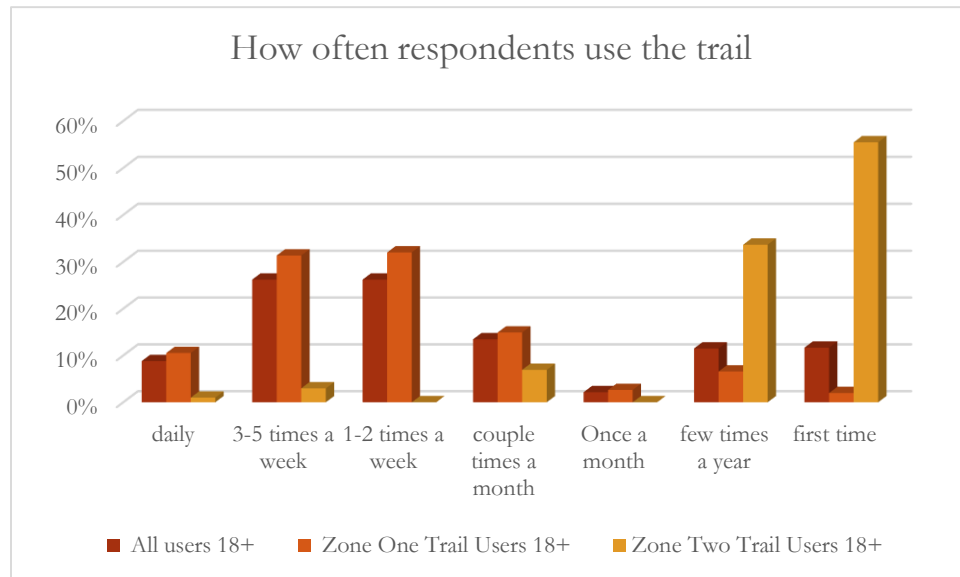
Frequency of Use – weekly use

Question 16: How often, on average, do you use the trail? Please choose only one of the following.

Percent of Trail Users by How Often They Use the Trail

How often Respondents Use The Trail	Percent
Daily	9%
3-5 times a week	26%
1-2 times a week	26%
Couple times a month	13%
Once a month	2%
Few times a year	11%
First time	12%

n = 557



Findings

The majority of trail users (61%) report visiting the trail at least once a week with 9% visiting daily and another 26% visiting three to five times per week. This kind of frequency demonstrates that the ECT may play a major role in helping residents of ECT communities obtain the 150 minutes of moderate aerobic activity per week that the American Heart Association and World Health Organization recommend for good health.^{21, 22}

Because of the high level of local use, the ECT experiences greater repeat use than found on the Great Allegheny Passage, where only 25.9% of those surveyed used the trail once a week or more and the Katy Trail where overall visitors averaged 26 visits per year and local visitors averaged 51 visits a year or about once a week.

For Zone One residents, 74% use the trail at least weekly. As expected, high frequency use by Zone Two residents is much lower, with only 4% of Zone Two residents using the ECT once a week or more. Especially noteworthy is the 55% of Zone Two residents for whom it was their first ECT visit.

Days of Use – weekend and weekday use

Question 17: When do you use the trail? Please choose all that apply;

Percent of Trail Users by When They Use the Trail

Days	Percent
Weekend	22%
Weekday	14%
Both	63%

n = 541

Findings

As for when during the week they make their trail visits, a majority of trail users surveyed indicated they visit the ECT on both weekdays and weekends.

Seasons of Use – spring, summer and fall predominate

Question 18: What seasons do you make use of the trail? Please choose all that apply.

Percent of Trail Users by Season of Use

Season	Percent
Spring	82%
Summer	96%
Fall	75%
Winter	26%

n = 524

Findings

When asked to select the seasons that they use the trail, more than three-fourths of those surveyed indicated they used the trail in spring, summer, and/or fall. Only 26% of those surveyed reported using the trail during the winter. However, since the survey was not conducted during winter months, it would not have captured persons who only use the trail during this season and thus may underrepresent winter use. For marketing purposes, it would be important to present photos of the trail in at least these three seasons and highlight varying benefits and experiences associated with each.

Mode of Reaching Trailhead – driving

Question 19: How do you generally get to the trail entrance? Please choose only one of the following.

Percent of Trail Users by Mode of Reaching Trailhead

Group	Percent
Walk	12%
Bike	29%
Horseback	0%
Car, truck, van	59%

n = 545

Percent of Trail Users Living Less Than 5 Miles from the Trail by Mode of Reaching Trailhead

Group	Percent
Walk	22%
Bike	35%
Horseback	0%
Car, truck, van	44%

n = 268

Findings

The majority of survey respondents (59%) reported getting to the trail by car, truck, or van, although 29% reached the trail by bike and another 12% by walking. The fact that 41% of respondents access the trail by walking or cycling is not surprising as the trail, by virtue of its location next to the Erie Canal in many places, is close to the center of towns and villages. For those living only five miles from the trail, the number of persons who access the trail by walking or bicycling increases to 57%. These results are also consistent with the primarily local use.

The large percentage of non-motorized travel to the trail that already exists highlights the need to ensure that ECT communities work to develop the infrastructure that supports safe bicycling and walking as part of their street network.

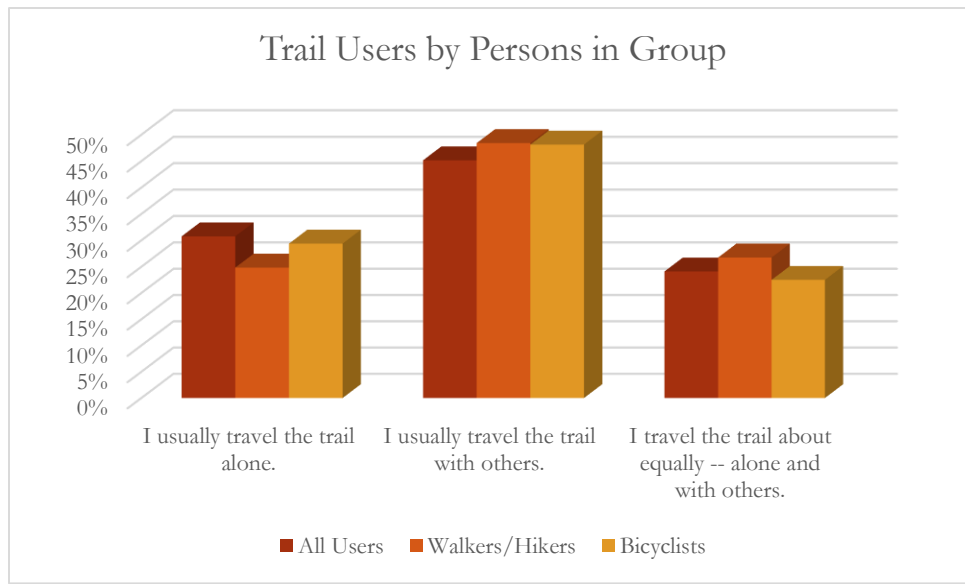
Composition of Travel Group – with others

Question 20: Which of these statements best fits your use of the trail? Please choose only one of the following.

**Percent of Trail Users by
Persons in Group**

Typical Travel	Percent
I usually travel the trail alone.	30%
I usually travel the trail with others.	45%
I travel the trail about equally -- alone and with others.	24%

n = 556



Findings

Almost half of survey respondents (45%) indicated they usually travel the trail with others. Another 30% usually travel alone, and 24% travel equally alone or with others. The majority of trail users (81%) do not travel with children under 15.

Solo vs. group travel did not differ much whether the respondents were bicycling or walking as 48% of respondents in each category indicated they usually travel with others. Traveling alone was only minimally more popular with bicyclists.

Size of Travel Group – one to three persons

Question 21: How many people do you generally travel with?

Percent of Trail Users Who Typically Travel With Others by Number of Companions

Number of Companions	Percent
1 companion	46%
2 - 3 companions	44%
3 - 7 companions	7%
More than 7 companions	3%

n = 381



Findings

Of those who travel with others, 46% do so with one companion while 44% travel with 2-3 others. It is noteworthy that 3% of those who travel in a group do so with more than seven others.

Trail Entry and Exit – same location

Question 22: Do you generally exit from the trail in the same place that you started?

Percent of Trail Users by Trail Exit

Response	Percent
Yes	76%
No	24%

n = 502

Findings

About three-quarters of those surveyed enter and exit the trail at the same place. On the Katy Trail, 15% of visitors traveled one way on the trail and 84% traveled out and back.

Preference for Accommodations – hotels/motels

Question 23: If you planned to stay overnight, where would you most likely stay?

Percent of Trail User by Lodging Preference

Lodging preference	Percent
Hotels/motels	42%
B&B	36%
Campground	22%

n = 341

Findings

Almost three-fourths of trail users have not taken an overnight trip on the ECT. When these persons were asked where they would most likely stay if they planned to stay overnight as part of their visit to the trail, hotels or motels were the most popular choice, followed by B&Bs and campgrounds. This should signal an opportunity for all lodging venues near to the trail, especially motels and hotels, to direct their messaging to this potential trail user market.

Erie Canalway Trail Vacationers

As demonstrated in Chapter Three of this report, expenditures associated with ECT vacations, such as lodging and restaurants, can have a major impact on spending and the economic impact of the ECT. Therefore, the data has been further segmented to learn more about the demographics and desires and motivations of ECT Vacationers in order to help inform future business development decisions and marketing and tourism promotion efforts along the ECT.



ECT Vacationers are the 22% of trail users who responded affirmatively to a survey question asking them if they were vacationing in the area away from their home. ECT Vacationers may be exclusively visiting the trail or they may include a visit to the trail as one of many other vacationing activities. Not all vacationers included an overnight stay in their visit to the trail; 19% of survey respondents indicated they were vacationing in the area away from their home but were not taking an overnight or longer trip along the ECT.

Although the sample size of 119 for vacationers is smaller than the sample size of all trail users, it is large enough to report statistically significant results with a confidence level of 95% and a confidence interval of 10.

Vacationing Status

Question 24: Are you vacationing in the area, away from your home?

Percent of All Trail Users Who Are Vacationing

Status	Percent
Vacationing	22%
Not vacationing	78%

n = 550

Findings

Twenty-two percent of survey respondents were defined as ECT Vacationers as they indicated they were vacationing in the area away from their home.

Demographics of ECT Vacationers

Residence of ECT Vacationers –non local

Question 25: What is your zip code? (Zip codes were aggregated to determine county of residence)

Percent of Vacationers by Zone

Zone	Percent
Zone 1	24%
Zone 2	76%

n = 119

Findings

As would be expected, more than three-quarters of ECT Vacationers reside outside of the ECT and surrounding counties. The 24% of Zone One Users (those living within an ECT or adjacent county) who indicated they were visiting the trail as a vacation activity is noteworthy for what it may convey about the local interest and enthusiasm that the ECT generates. These may be persons engaged in either a “staycation” or driving as much as 300 miles to experience another section of the trail.

Gender of ECT Vacationers – majority male

Question 26: My gender is . . .

Percent of Vacationers by Gender

Gender	Percent
Male	68%
Female	32%

n = 111

Findings

More of the vacationers are male (68%) than the general population of trail users (57%). These results are relatively similar to the Great Allegheny Passage Trail where 70.9% of trail users who stayed overnight were male and the Katy Trail where 79% of nonlocal visitors were male.

Age of ECT Vacationers – Baby Boomers

Question 27: My age is . . .

Percent of Vacationers by Age

Age Cohort	Percent
18-29	8%
30-39	16%
40-49	16%
50-69	55%
70-79	4%
80+	1%

n = 104



Findings

ECT Vacationers are considerably older – 60% were over 50 years of age – than the general population of trail users where the over 50s represent only 42%. More than half of ECT Vacationers (55%) are Baby Boomers (50 and 69), in contrast to the overall trail user population where the largest age group is Generation X (30-49) at 41%. Just 24% of ECT Vacationers are under 39 years, while 41% of all trail users are in that age group.

Household Income of ECT Vacationers – high

Question 28: My approximate annual household income is . . .

Percent of ECT Vacationers by Household Income

Household Income	Percent
Less than \$10,000	0%
\$10,000 - \$24,999	0%
\$25,000 - \$34,999	3%
\$35,000 - \$49,999	14%
\$50,000 - \$74,999	19%
\$75,000 - \$99,999	11%
\$100,000 - \$149,999	28%
\$150,000 - \$199,999	12%
\$200,000+	12%

n = 90

Findings

ECT Vacationers are more affluent than the general population of trail users. More than half of vacationers (52%) have household incomes greater than \$100,000, almost twice that of the general population of trail users at 28%. Only 36% of vacationers have a household income of less than \$75,000 with no one reporting less than \$25,000.

These vacationers are also more affluent than overnight visitors to the Great Allegheny Passage Trail, 34.8% of which earn an annual household income of over \$100,000.

Educational Level of ECT Vacationers – highly educated

Question 29: What is your highest level of education?

Percent of Vacationers Educational Attainment

Highest Level of Education	Percent
Less than high school diploma	0%
High School Diploma	2%
Some College	6%
Two Year Degree	8%
Four Year Degree	36%
Graduate or Professional Degree	47%

n = 110

Findings

ECT Vacationers are highly educated. More than one in eight of those surveyed (83%) had a four-year degree or more compared to 65% of all trail users. Almost half (47%) of ECT Vacationers had a graduate or professional degree.

Employment Status of ECT Vacationers – employed

Question 30: My current work status is...

Percent of ECT Vacationers by Employment Status

Employment Status	Percent
Student	2%
Looking for work	1%
Retired	20%
Employed full time	69%
Employed part time	8%

n = 99

Findings

More than three-quarters of ECT Vacationers (77%) are employed part- or full-time, slightly more than the general population of trail users (74%). About the same percentage of vacationers are retired (20%) as in the general population of survey respondents (19%).

Nature of Trail Use by ECT Vacationers

Activity of ECT Vacationers – biking predominates

Question 31: What activities do you engage in along the trail? Of those you checked off, which is your most common activity on the trail?

**Percent of Vacationers by
Most Common Activity**

Trail Activity	Percent
Biking	87%
Walking/hiking	12%
Bird watching	0%
Boating	1%
Horseback	0%
Rollerblading	0%
Running	0%
Skiing	0%
Walking a pet	0%

n = 111



Findings

Bicycling is the primary activity for 87% of ECT Vacationers, much greater than for all trail users (59%). These results underscore that bicyclists should be the major focus for ECT tourism marketing efforts.

Spending of ECT Vacationers

Question 32: Total expenditures while on vacation

Average Spending by ECT Vacationers

	Motel, hotel, cabin or B&B	Camping fees	Restaurant s & bars	Groceries, take-out food/drinks	Gas & oil	Other vehicle expenses	Local transportation	Admissions & fees	Clothing	Sporting goods	Gambling	Souvenirs and other expenses	Total Spend
Zone 1 Vacationer Spending	\$252	\$88	\$216	\$52	\$64	\$38	\$0	\$19	\$82	\$56	\$0	\$29	\$612
Zone 2 Vacationer Spending	\$533	\$129	\$298	\$106	\$92	\$38	\$39	\$39	\$68	\$97	\$25	\$85	\$1,055
Average Vacationer Spending	\$469	\$116	\$278	\$92	\$83	\$38	\$30	\$32	\$73	\$83	\$15	\$68	\$939

n = 88

Findings

Survey responses indicate that ECT Vacationers spend on average \$939 per visit, considerably more than the weighted average spending of all trail users of \$133.31 per person/visit presented in Chapter Three. As expected, Zone Two Vacationers spend the most, an average of \$1055 per visit.

Trail as a Factor in Destination Choice for ECT Vacationers – definitely yes

Question 33: Was the Trail a strong factor in your decision to stay in or visit the area?

Percent of Vacationers by Trail as a Factor in Destination Choice

Response	Percent
Yes	96%
No	4%

n = 100

Findings

The ECT definitely makes an important contribution to drawing vacationers to the region. For 96% of the ECT Vacationers, the trail strongly influenced their decision to stay in or visit the area.

How ECT Vacationers First Learned About the Trail – word of mouth

Question 34: How did you first find out about the trail?

Percent of Vacationers by How They First Found Out About the Trail

Communication Channel	Percent
Word of mouth	42%
PTNY website	28%
Internet search	21%
PTNY Guidebook	19%
Magazine	17%
Driving past	13%
NYS Canal Corporation website	11%
Bike shop	9%
County tourism office	6%
Live by the trail	5%
Trail kiosk	4%
Signage	4%
Newspaper	4%
Tourist agency	3%
Other	12%

n = 100

Findings

Vacationers first learned about the ECT through a variety of communication channels. The greatest percentage of those surveyed (42%) said they first found about the trail through word of mouth. PTNY's website was the first introduction to the trail for 28% of vacationers followed by an Internet search for 21% and PTNY's guidebook at 19%.

Given that so many of the ECT Vacationers were from Zone Two, it is surprising that the most popular communication channel through which they heard about the ECT was word of mouth. It may be that ECT Vacationers hear about the trail from friends, family, fellow bike club members, or others, especially those who may have participated in Cycling the Erie Canal, PTNY's annual eight-day bike tour. After hearing about the trail, they may then find the PTNY ECT map online and while there opt to buy the guidebook to plan their trip and take along on their trail visit.

Trip Planning Materials Used - multiple

Question 35: How did you plan your vacation?

Percent of ECT Vacationers by Trip Planning Resources

Trip Planning Resource	Percent
PTNY guidebook	69%
Map	43%
Internet Search	35%
PTNY map	25%
Canal Corporation Website	17%
Other	13%
Roadside signage	8%
County tourism office	7%
Tourist agency	1%

n = 106

Findings

Vacationers were also asked to select the trip planning materials they used. PTNY's Cycling the Erie Canal guidebook was used by the greatest number of vacationers to plan their trip to the ECT (69%), which affirms the popularity of this resource that has sold more than 15,000 copies. It is unclear what map was used by 43% of the vacationers, but it most likely includes the free maps provided by the NYS Canal Corporation and Erie Canalway National Heritage Corridor. The fact that only 25% of vacationers used the PTNY website map is interesting as the website offers most of the same information contained in the guidebook. It may be that vacationers prefer having a hard copy they can reference at any time and place.

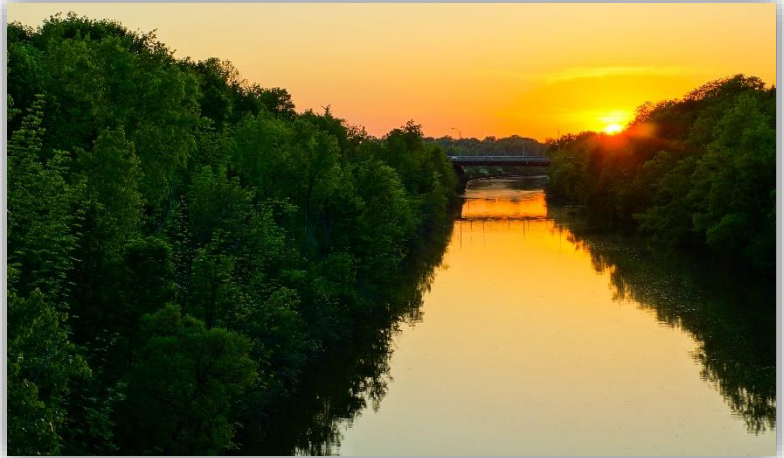
Why Vacationers Choose the ECT – biking and natural scenery

Question 36: What attributes along the Trail attracted you to visit it? Please choose all that apply.

Percent of ECT Vacationers by Trail Attributes that Influenced Visit

Trail Attribute	Percent
Biking	76%
Natural scenery	75%
Affordability	55%
Tranquility	43%
Environmental quality	36%

n = 92



Findings

Vacationers cited a number of reasons for choosing the ECT. Biking and the natural scenery were the major reasons, mentioned by 75% or more of ECT Vacationers. Affordability was also noted by 55%, followed by tranquility (43%), and environmental quality (36%). These responses are important for guiding efforts to develop messages to target and attract a greater portion of the cycling vacationer market.

Overnight Vacationers

Overnight Vacationers

Question 37: Do you ever take overnight or longer trips along the Erie Canalway Trail?

ECT Vacationers Who Take Overnight or Longer Trips Along the Erie Canalway Trail

Take Overnight or Longer Trips?	Percent
Yes	81%
No	19%

n = 100

Findings

The survey data was further separated to learn more about the 81% of ECT Vacationers who included an overnight stay as part of their vacation on the trail. As lodging is such a significant aspect of ECT visitor spending, information on this population segment can help inform future marketing efforts.

Demographics of Overnight ECT Vacationers

Because such a large percentage of ECT Vacationers stay overnight, their zone of residence, gender, age, household income, and employment status are almost equivalent to those reported for all ECT Vacationers.

Nature of Overnight Vacationing Trail Use

Most Common Activity of Overnight Vacationers - biking

Question 38: What activities do you engage in along the trail? Of those you checked off, which is your most common activity on the trail?

Percent of Overnight Vacationers by Most Common Activity

Trail Activity	Percent
Biking	89%
Bird watching	0%
Boating	1%
Horseback	0%
Rollerblading	0%
Running	0%
Skiing	0%
Walking a pet	0%
Walking/hiking	9%

n = 74

Findings

When the data were separated to look just at Overnight Vacationers, the percentage of bicyclists increased only slightly from 87% to 89%. Perhaps because there are not as many other vacation activities, 96.9% of overnighers surveyed on the Great Allegheny Passage Trail reported biking as their primary activity

Length of Stay of Overnight Vacationers – 3 to 6 nights

Question 39: How many nights did you stay away from home?

Percent of Overnight Vacationers by Number of Nights Stayed

Number of Nights Stayed	Percent
1 night	4%
2 nights	24%
Between 3 and 6 nights	37%
Between 7 and 14 nights	29%
More than 14 nights	5%

n = 75

Findings

In terms of revenues from lodging, which is a major component of trail user spending, it is important to note that 95% of Overnight Vacationers stay at least two nights. Equally impressive, two-thirds of Overnight Vacationers stay away from home between 3 and 14 nights and more than one-third (34%) stay overnight seven days or more. The average number of nights that they report staying away from home is 6.19 nights.

For the Great Allegheny Passage Trail, 73% of survey respondents planned to stay two or more nights. The average number of overnight stays reported in conjunction with their trips was 2.4. For the Katy Trail, overnight visitors stayed an average 2.5 nights. These results could explain some of the lower spending per visit for visitors to the Great Allegheny Passage and Katy Trails.

Accommodation Choice of Overnight Vacationers – hotel/motel

Question 40: In what category of residence did you stay in during your visit to the Canal Trail?

Percent of Overnight Vacationers by Lodging Category Utilized

Lodging category	Percent
Hotel/Motel	44%
B&B	35%
Campground	20%
Staying with friends or family	1%

n = 75

Findings

When Overnight Vacationers were asked where they actually stayed during their visit to the trail, hotels and motels were the most popular choice at 44%. Bed and breakfasts were used by 35%, campgrounds by 20% and 1% indicated they were staying with family or friends.

These results compare favorably with the preference for accommodations expressed by the general population of trail users who have not yet included an overnight stay in an ECT visit: 42% said they would prefer to stay in a motel or hotel and 36% indicated they would stay in a B&B.

On the Great Allegheny Passage Trail, campgrounds (38.9%) and staying with friends and relatives (6.9%) were more popular with overnight visitors. Less popular were the motels and hotels chosen by 22% of trail users.

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CHAPTER 5: INTERVIEWS WITH OWNERS OF LOCAL BUSINESSES IN ECT COMMUNITIES

Surveyors visited the owners/managers of more than 100 local businesses along the Erie Canalway Trail and more than half of these individuals (53) completed a usable questionnaire. See Appendix D for the business owner survey.

Type of Businesses Surveyed

Business Type	Total Sample	Percent
Hotel or Other Lodging	8	15.10%
Outdoor store	2	3.80%
Bicycle Shop	4	7.50%
Restaurant - Fast Food	3	5.70%
Restaurant - Other	10	18.90%
Convenience store	3	5.70%
Gas Station	4	7.50%
Retail/Gift/Specialty store	4	7.50%
Sporting Goods store	2	3.80%
Drug Store/Pharmacy	2	3.80%
Supermarket	1	1.90%
Medical/Emergency Center	4	7.50%
Local Transportation	2	3.80%
Auto Service	1	1.90%
Bar	1	1.90%
Recreation/Amusement	1	1.90%
Not Specified	1	1.90%
Total	53	100%

Restaurants other than fast food (10), hotels and other lodging (8), bicycle shops (4), gas stations (4), retail/gift/specialty stores (4) and medi/emergency centers (4) were the major business types that provided input. Three-quarters of these businesses (76%) were locally owned vs. 24% that were part of a national or regional business network. Owners had a median of 11 years in their business. Their annual reported revenues ranged from less than \$500,000 to more than \$5 million, with the modal category of \$500,000 to \$1,000,000.

Impact of ECT Users

When respondents were asked to measure their current and future business plans and experiences, the overwhelming consensus was that ECT users have a substantial impact: more than half (51%) said the trail had a moderate (30%) to big impact (21%). Only two businesses, a convenience store and a gas station, felt the ECT had little or no financial impact.

Likelihood of Hiring Additional Employees

Local business owners in communities along the ECT were asked a series of questions that measured how likely they would be to hire more full-time and/or part-time employees under three realistic scenarios -- if ECT users were to boost their annual revenue by 5%, 10% or 15%:

- A revenue increase of 5% from trail users would only cause one-third of respondents (6% very likely; 27% somewhat likely) to hire more employees.
- A revenue increase of 10% from trail users would cause nearly 75% of respondents (18% very likely; 54% somewhat likely) to hire more employees.
- If revenue from trail users were to increase by 15%; nearly all respondents (62% very likely; 34% somewhat likely) to hire more employees.

Effectiveness of PTNY's ECT Promotion Efforts

Business owners were more positive (6% very effective; 53% somewhat effective) than negative (34% not very effective; 8% not at all effective) with regard to the effectiveness of efforts to promote the ECT undertaken by PTNY, several state agencies, Chambers of Commerce and local tourism offices, and local business owners.

Nearly all local business owners interviewed (39% very interested; 46% somewhat interested) said that they support much closer coordination between state, local and county agencies, plus local Chambers and local business owners such as themselves in promoting the Erie Canalway Trail.

Knowledge of the ECT

In response to the question of how much they knew about the ECT and trail users before their interview for this study, just as many said they knew only a little about the trail (29%) as those who said they knew a lot (29%). The biggest percentage of respondents said that they knew "a few things" about the trail before the interview (42%).



Availability of Shipping Services

In response to the final question in the survey -- "Do you offer shipping services for items that trail users buy along the trail?" -- only 27% said yes, while a large majority (73%) said no. This is not a finding that would be considered "trail user friendly" among long-distance bicycle tourists on the trail, some of whom are thousands of miles from home.

General Feedback

The business owner survey also contained an open-ended question asking for feedback. Most of the comments indicated that business owners recognized a positive impact from the trail, although most were unsure of just how much, and thought the trail needed more resources devoted to promotion. Business owners are doing a variety of things to attract trail tourists and had a number of suggestions for how trail promotion could be increased. See Appendix E for a complete list of all comments.

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CHAPTER 6: INTERVIEWS WITH LOCAL TRAVEL AND TOURISM OFFICIALS

All six of the Travel and Tourism (T&T) officials interviewed for the study said they were either "very" or "somewhat" knowledgeable about the ECT before their interview took place. All six officials were aware of the basic facts about the Erie Canalway Trail -- 350+ miles, stretching through 14 counties and passing by the major NYS cities of Buffalo, Rochester, Syracuse, Utica and Albany. However, only one had read or heard about the trail survey from press releases that had been sent out before the start of trail counts and trail interviews.



Three of the six T&T officials said that PTNY had been in contact with them during the past year and that their local/county agencies had received printed and photographic material from PTNY that they could incorporate into their own efforts to promote the ECT. Two of the six said that they had been aware of PTNY's annual Cycling the Erie Canal Buffalo-to-Albany bicycle tour in July.

All six said that they would welcome annual (or even more frequent) contact with PTNY's staff and that they could do more to publicize the 500+ bicycle tourists as they pass through their counties on the *Cycling the Erie Canal* bicycle tour from Buffalo to Albany. None of the six was knowledgeable about the numbers of bicyclists, walkers, hikers and joggers that use their local section of the ECT and said they wanted to be on the mailing list to receive both announcements about the next bike tour and copies of the report from this study.

Below are some of the verbatim comments of T&T officials. See Appendix F for additional verbatim comments of T & T officials:

"We mainly cover events and venues on the Niagara Frontier (Niagara Falls and Buffalo), but the Erie Canal Trail is a unique attraction that we would like to market more. Not so much for local people, many of whom already walk, bike or hike the trail, but more so for bicycle tourists and people who are interested in the history of the Erie Canal."

"A few years ago we put together a little brochure with photos and the history of the local locks along the canal and it was a big hit. We were only going to print a thousand but we had to triple the print run. Maybe we should run it again next summer."

"We learned all about the Erie Canal when I was growing up in Pittsford. And now I am partly responsible for showcasing the canal and canal trail. We would sure welcome more help from Albany."

"Our county legislature is considering doubling the size of a picnic area along the trail, which would include doubling the number of parking spaces, adding modern lighting and sanitary facilities, and putting up more signs directing people to the expanded park. We think that park would be great for us. But we are going to need money from the state government. Maybe Governor Cuomo will read your report. Sure hope so."

"If your survey report shows that users of the Canalway Trail are spending a lot of money in our towns, maybe that would convince local merchants to wake up and form a group to fund more promotion of the canal and trail. Because right now I am not sure they take them seriously."

"The summer bicycle tour from Buffalo to Albany seems to be growing bigger every year. That's good. But what about the day-to-day trail use during the rest of the year? Your numbers and statistics will be very important to us."

"We need a real partnership between the counties and cities and Albany. The trail is a little gem that could really bring a lot more people to New York State. But you have to make the investment to do it."

CHAPTER 7: ENDNOTES

- ¹ Stynes, D. J., D. B. Propst, W. H. Chang, and Y. Sun. *Estimating regional economic impacts of park visitor spending: Money Generation Model Version 2 (MGM2)*. Department of Park, Recreation, and Tourism Resources; Michigan State University; East Lansing, Michigan, USA. 2000.
http://35.8.125.11/mgm2_new/
- ² Lindsey Greg; Wilson, Jeff; Rubchinskaya, Elena; Yang, Jihui; Han, Yuling. "Estimating Urban Trail Traffic." *Landscape and Urban Planning*, 81 (2007), 299-315. 2007.
- ³ Alta Planning & Design and the Institute of Transportation Engineers (ITE) Pedestrian and Bicycle Council. National Bicycle and Pedestrian Documentation Project. 2009.
- ⁴ Note: July, 2012 had 9 weekend days, rather than the assumed 8. Thus, this result and the overall projection underestimates the overall volume.
- ⁵ 4.3 represents the average number of weeks per month.
- ⁶ Lindsey, Greg. Personal Communication with Paul A. Scipione, Ph.D. 2013.
- ⁷ Although monthly estimates were calculated from June, July, August and September counts, each estimate was entered in the *Lindsey 2 Model* as an estimate for July – Lindsey's highest traffic month. This provides the most conservative estimates for annual trail traffic because it assumes the recorded count observations represent the highest traffic that may be experienced throughout the year.
- ⁸ For a confidence level of 95% CI [+/- 5] and a population of 1,603,214, $n=384$.
- ⁹ The 14 ECT counties are: Albany, Cayuga, Erie, Herkimer, Madison, Monroe, Montgomery, Niagara, Oneida, Onondaga, Orleans, Seneca, Schenectady, and Wayne. The 21 adjacent counties are: Yates, Wyoming, Tompkins, St. Lawrence, Schoharie, Saratoga, Rensselaer, Otsego, Oswego, Ontario, Livingston, Lewis, Hamilton, Greene, Genesee, Fulton, Cortland, Columbia, Chenango, Chautauqua, and Cattaraugus.
- ¹⁰ Stynes, et. al. 2000.
- ¹¹ The MGM2 model offers a choice of one of four generic multiplier categories (rural, smaller cities, small metro, large metro) but because of the heterogeneous nature of the ECT none of these categories fully represent the entire trail environment. Most of the 200 communities along the ECT have less than 50,000 residents and are classified as rural. The corridor also includes large metro areas, Rochester and Buffalo, both of which have a population of more than 1.1 million, and the Albany-Schenectady metro area with a population of almost 900,000, in addition to the small metro areas of Syracuse and Utica with populations of 662,000 and 299,000, respectively.
- ¹² New York State Office of Parks, Recreation and Historic Preservation, "Every Mile Counts: An Analysis of the 2008 Trail User Surveys." September 2010. 7, 20-25, 36-40, 52-53, 55-58, 60, 62-63.
- ¹³ New York State Canal Corporation, *Economic Impact Study of New York State Canal Tourism*. Eric Mower Associates, 2008. 7, 17-19.
- ¹⁴ Missouri State Parks, *Katy Trail Economic Impact Report, Visitors and MGM2 Economic Impact Analysis*. 2012. 3, 5-6.
- ¹⁵ Campos Inc. *The Great Allegheny Passage Economic Impact Study*. Report prepared for The Progress Fund, Laurel Highlands Visitors Bureau and the Allegheny Trail Alliance, August 7, 2009, Job #07-294. 7, 14, 17, 29.
- ¹⁶ Center for Regional Progress, Frostburg State University, *2012 Trail Town User Survey Report for The Progress Fund*. 2012. 17.
- ¹⁷ Campos, Inc. 2009. 17.
- ¹⁷ Missouri State Parks, 2012. 6.
- ¹⁸ New York State Office of Parks, Recreation and Historic Preservation, 2010.
- ¹⁸ Tomes, Pat and Carl Knoch, *Trail User Surveys and Economic Impact: A Comparison of Trail User Expenditures*. Rails to Trails Conservancy. 2009.
- ¹⁸ Tomes, Pat and Carl Knoch, *D & L Trail 2012 User Survey and Economic Impact Analysis*. Rails to Trails Conservancy, 2012.
- ¹⁸ Campos Inc., 2009.
- ¹⁸ Campos Inc. *Phase III: Trail Town Business Study. Report #07-294c*. Pittsburgh PA: Campos Inc. and The Progress Fund, 2009.

¹⁸ Missouri State Parks, 2012.

¹⁹ Bike On Tours, “Develop Cycle Tourism in Your Community Become A Bicycle Touring Destination.” 2013.
<http://www.bikeontours.on.ca/tourism.htm>

²⁰ Rails-to-Trails Conservancy. *Schuylkill River Trail 2009 User Survey and Economic Impact Analysis*. Rails-to-Trails Conservancy. 2009.

²¹ American Heart Association, “Recommendations for Physical Activity in Adults.”
http://www.heart.org/HEARTORG/GettingHealthy/PhysicalActivity/StartWalking/American-Heart-Association-Guidelines_UCM_307976_Article.jsp

²² World Health Organization, “Fact Sheet N°385 Physical Activity.” February 2014.
<http://www.who.int/mediacentre/factsheets/fs385/en/>

Photo Credits

Most photos utilized in this report come from PTNY’s Erie Canal photo archives. However, the following photos were graciously supplied by outside sources:

Executive Summary:

- Photo 2 – The Sims Store: Chris Bolt, WAER.ORG
- Photo 4 – Montezuma National Wildlife Refuge: Chris Bolt, WAER.ORG
- Photo 5 – Camillus Erie Canal Park: Chris Bolt, WAER.ORG

Chapter 3:

- Photo 3 – Missouri Visitors: Chris Bolt, WAER.ORG

Chapter 4:

- Photo 10 – Bikes on a Boat: Sarah Wiles, Mid-Lakes Navigation
- Photo 11 – Sunset on the Canal: James Bates, WikiMedia Commons

Chapter 6:

- Photo 1 - Sunset over the Erie Canal in North Tonawanda: Joshua Karn, WikiMedia Commons

APPENDIX A: ERIE CANALWAY TRAIL SEGMENTS AND COUNT LOCATIONS

Segment 1: *Buffalo waterfront to Pendleton*, including downtown Buffalo near Navy Park, Niawanda Park in the City of Tonawanda and the towns of Tonawanda and Pendleton
Counties: Erie and Niagara

The paved trail begins at the Buffalo Inner Harbor and follows the Niagara River for about 14 miles through a primarily urban/suburban environment to the City of Tonawanda. In the adjacent Town of Tonawanda the paved trail follows the canal through the suburban Town of Amherst for about eight miles.

At the Town of Pendleton, the trail detours to the road before reaching the heart of the City of Lockport.

Automatic Counter and Observational Trail Counts:

1) Niawanda Park, City of Tonawanda, Erie County

Niawanda Park is located on the banks of the Niagara River and a popular recreation area for the city's 15,000 residents. The trail is paved and located close to the river's edge. The area surrounding the park is densely residential.

Segment 2: *Lockport to Albion*
Counties: Niagara and Orleans

Off-road, stone dust trail begins in the City of Lockport at the historic five-step locks and continues east along the north side of the canal through farmland and orchards. Small canalside hamlets and the Villages of Medina and Albion are located on the south side of the canal across from the trail.

Observational Trail Counts:

1) Widewaters, City of Lockport, Niagara County

The Widewaters are located east of where the trail begins at the Five Locks.

Segment 3: *Albion to Rochester west of the Genesee River*
Counties: Orleans and Monroe

East of the Village of Albion, the stone dust trail continues along the north side of the canal through farmland, the small rural Village of Holley, and the college town Village of Brockport before entering the suburban Village of Spencerport and the more heavily populated Rochester suburb of Greece. Further east the trail is paved in the more commercial and industrial area of the Rochester suburb of Gates.

Observational Trail Counts:

1) Henpeck Park, Town of Greece, Monroe County

Henpeck Park is a grassed, linear park located along the canal that includes the paved trail, picnic tables and grills.

Segment 4: *Rochester east of the Genesee River to Newark*, including Schoen Place in Pittsford, Bushnell's Basin; Village of Fairport; Perinton; and Palmyra
Counties: Monroe and Wayne

The paved trail continues to follow the north side of the canal from where it crosses the Genesee River in the City of Rochester's Olmsted-designed Genesee Valley Park to the residential suburbs of Brighton, Pittsford and Perinton and the bustling villages of Pittsford and Fairport. East of Pittsford, with the exception of the section in the Village of Fairport, the trail is stone dust. East of Fairport, the trail passes along the canal through more farmland and the villages of Macedon and Palmyra before terminating at the Village of Newark.

Observational Trail Counts:

1) Lock 33, Jewish Community Center, Town of Brighton, Monroe County

The trail is paved and located adjacent to the Community Center. Across the street from the Community Center is Lock 33 with a lock tender's house, small park, and parking lot.

2) Schoen Place, Village of Pittsford, Monroe County

The paved trail is located next to the canal and numerous small restaurants and other shops. Trail traffic is of sufficient volume that cyclists are asked to walk their bikes. To the east of the commercial area the trail is stone dust and runs along the canal and the rear yards of many houses.

3) *Perinton Park, Village of Fairport, Monroe County*

The park is located adjacent to the paved trail and canal at the western side of the village before entering the commercial district. The park has a community building and parking lot.

4) *Whitbeck Road, Town of Arcadia, Wayne County*

The stone dust trail traverses a wooded area adjacent to the canal west of the Village of Newark.

Automatic Trail Counter:

1) *Bushnell's Basin, Town of Perinton, Monroe County*

The trail is stone dust and adjacent to the canal. Through a wooded area are a parking lot and suburban homes. Nearby is an historic bridge across the canal leading to a small commercial area and boat docks.

Newark to Port Byron: Trail users must detour to local roads and State Route 31 for 30 miles before reaching the small rural village of Port Byron.

Segment 5: *Port Byron to Camillus*, including the Nine Mile Creek Aqueduct
Counties: Cayuga and Onondaga

From Port Byron, the stone dust trail primarily follows the former alignment of the historic Enlarged Erie Canal. In some areas water remains in the prism. Much of the trail is located adjacent to wetlands and active and inactive farmland. After about seven miles the trail enters the small historic Village of Jordan before continuing on through farmland and scrub land along the Enlarged Erie to the Town of Camillus where the Sims Store, a replica of a canal store and associated outbuildings, and the restored c.1844 Nine Mile Creek Aqueduct are located in a park-like setting. Just beyond the aqueduct, the trail ends at Warners Road.

Automatic Counter and Observational Trail Counts:

1) *Nine Mile Creek Aqueduct, Town of Camillus, Onondaga County*

The stone dust trail passes over a restored aqueduct, 1.5 miles from the Sims Store which is a popular spot for trail users to park.

Camillus to DeWitt: Trail users must detour to the roads within the Town of Camillus, Village of Solvey, Town of Geddes, City of Syracuse, and Town of DeWitt for a total of about 16 miles.

Segment 6: *DeWitt to Oneida*, including Cedar Bay Park in DeWitt
Counties: Onondaga and Madison

Off-road stone dust trail begins along the alignment of the historic Enlarged Erie Canal in the Town of DeWitt's Ryder Park adjacent to the Limestone Creek Aqueduct. The trail becomes part of the 36-mile Old Erie Canal State Park in the town of DeWitt. It first travels adjacent to suburban residential neighborhoods before entering active and inactive farmland. It then skirts the Village of Chittenango and travels through the center of the Village of Canastota before arriving on the outskirts of the City of Oneida at the Durhamville Aqueduct.

Observational Trail Counts:

1) Cedar Bay Park, Town of Dewitt, Onondaga County

The stone dust trail is located on the north side of the Enlarged Erie Canal within Old Erie Canal State Park. A bridge across the canal links to a parking lot on the south side of the canal. The trail is surrounded by suburban residential neighborhoods.

Segment 7: *Oneida to Oriskany*, including Lock 21.
Counties: Madison and Oneida

Still within Old Erie Canal State Park, the trail diverges to the roadside on Route 46 for about two miles north of Oneida. After that detour, the stone dust trail follows the historic canal through farm and woodlands for five miles. The trail rejoins the active Erie Canal at Lock 21, where there is a hiker-biker-boater campsite. The trail is paved for about two miles until it diverts back to stone dust for about five miles along the historic Erie Canal. The trail ends at the Erie Canal Village on the outskirts of the City of Rome, which is the eastern boundary of Old Erie Canal State Park. Within Rome, the trail detours to the road for about five miles. Stone dust trail begins off-road again to the east of the city, extending about six miles to Oriskany.

No observational or automatic trail counts were taken in this section.

Segment 8: *Oriskany to Utica* including Lock 20 at Marcy and the east side of Genesee St. in Utica
Counties: Oneida and Herkimer

After a one-half mile on-road segment from Oriskany, the stone dust trail continues for approximately two miles along the active Erie Canal from River Street to the pedestrian bridge over Crane Brook. The trail is then paved for five miles to Genesee Street and the Canal Marina in Utica.

Observational Trail Counts:

1) Lock 20 Park, Town of Marcy, Oneida County

The paved trail passes on the south side of Lock 20 on the active Erie Canal where there is a hiker-biker-boater campsite, restrooms and a pavilion.

2) East side of Genesee Street, City of Utica, Oneida County

The paved trail ends at the Canal Marina located at Genesee Street

Utica to Mohawk: The trail is located on-road for about 12 miles between Genesee Street in the City of Utica and Route 28 in of the Village of Mohawk.

Segment 9: *Mohawk to Canajoharie*, including the Canal Harbor facility in the City of Little Falls and the Villages of St. Johnsville, Fort Plain and Canajoharie.

Counties: Herkimer and Montgomery

Two miles of paved and stone dust trail extend east from Route 28 in the Village of Mohawk to the historic Fort Herkimer Church along the south side of the Erie Canal and Mohawk River in the Town of German Flatts. The trail route then continues on-road for approximately six miles to the City of Little Falls. Beginning at Route 167 in Little Falls, there are two miles of paved trail and then approximately 14 miles of stone dust rail trail extending through farmland and the Mohawk River valley to the Village of Fort Plain. There are then four miles of paved trail from Fort Plain to the Village of Canajoharie.

Observational Trail Counts:

1) Villages of Canajoharie and Fort Plain, Montgomery County

As it was a former rail corridor, the paved trail is located in the center of the historic 19th century canal villages of Fort Plain and Canajoharie.

Segment 10: *Canajoharie to Amsterdam*, including Schoharie Crossing State Historic Site in Fort Hunter

County: Montgomery

East of Canajoharie the stone dust rail trail is located south of the Erie Canal and Mohawk River in an area of primarily rural farmland for approximately 15 miles before reaching Fort Hunter and the Schoharie Crossing State Historic Site. A paved trail then continues approximately five miles to the City of Amsterdam.

No observational or automatic trail counts were taken in this section.

Segment 11: *Amsterdam to Schenectady*

Counties: Montgomery and Schenectady.

Two more miles of paved trail extend east from Amsterdam south of the Erie Canal and Mohawk River. The trail route continues on-road for about eight miles to the hamlet of Rotterdam Junction, where the paved trail resumes along historic and active sections of the Erie Canal for about six miles to the City of Schenectady. A short section of the trail route is on-road within the historic Stockade District of the city.

Observational Trail Counts:

1) *Schenectady Community College, City of Schenectady, Schenectady County*

Segment 12: *Schenectady to Cohoes*, including the Rexford Aqueduct and Lions Park in Niskayuna.

Counties: Schenectady and Albany

From the City of Schenectady east, the trail is paved and follows the Erie Canal and Mohawk River through suburban neighborhoods and several parks for about 18 miles before entering the City of Cohoes.

Automatic Trail Counter:

1) *Lions Park, Town of Niskayuna, Albany County*

The trail passes through the park, also known as Railroad Station Park. The park includes a large parking area, picnic tables with views of the Erie Canal and Mohawk River, public canoe / kayak access, public restrooms and a turn-of-the-century train depot. The park is surrounded by dense suburban development.

Segment 13: *Cohoes to Albany* along the west side of the Hudson River, including Schuyler Flats Park in Watervliet, the Corning Preserve Park and boat launch, and the walkway over Rt. 787 in Albany. County: Albany.

The trail is on-road for about 4.5 miles from the City of Cohoes through the Village of Green Island and City of Watervliet. Paved trail begins opposite Menands and continues along the west bank of the Hudson River in an area of flood plain for about five miles to the Corning Preserve Park in the City of Albany.

Automatic Trail Counter:

1) *Corning Preserve, City of Albany, Albany County*

The Corning Preserve is a riverfront park and festival site located along the western bank of the Hudson River in the heart of the City of Albany.

APPENDIX B: TRAIL USER COUNT PROTOCOL AND COUNTING FORM



Who's On the Trail? Canalway Trail User Count – 2012



Count Protocol

Timing

1. At least four counts should be taken at each location.
2. Ideally, three counts should be taken during the same week or on the same days in successive weeks.
3. Weekday counts should always be done on Tuesday, Wednesday, and/ or Thursday, and never on a holiday, Monday, or Friday.
4. Weekend counts can be done on either day.

Conducting Counts

1. Count for at least two full hours at a time that you judge to be the time of peak activity. You can determine the time of peak activity from your experience or that of others who are familiar with the trail. It is expected that the weekend day hour of peak activity will be different from that during the week. *Contact Parks & Trails New York with questions regarding hours of peak activity.*
2. Counts can be conducted on consecutive weekdays (Tuesday through Thursday) during the same week and at the peak time on the Saturday or Sunday of that week. **OR**
Counts can be conducted on the same week day and weekend day in at least three consecutive weeks. Each count must be taken during the time of peak usage for weekdays and weekend days.
3. Do not worry if you count someone twice because they pass you going in both directions. The formulas used at the end will take that into consideration.

Personnel Required

1. One person can conduct the counting. If you are counting at a location with significant trail traffic, it may be advisable to have two people conduct counts and average their results.

Conducting the count

1. Use a new sheet each time you count.
2. Make a tick in the boxes for the type of trail user that passes by. For a tandem, make a tic for each rider. For someone pushing a baby carriage or stroller, make a tic for each child. Record the person pushing the carriage or stroller as a walker.
3. Stand where you do not block the trail but can easily observe users as they pass.
4. *If you wish, send pictures (500 KB in size or larger) of volunteers taking the count and persons using the trail that we can include in publications and presentations.*

THANK YOU FOR YOUR HELP!!!!

Please mail all forms to:

Canalway Trail User Count 2012
Parks & Trails New York
29 Elk Street
Albany, NY 12207
518-434-1583
eyearick@ptny.org
Or FAX to 518-427-0067



Who's on the Trail? The Canalway Trail User Count – 2012



Surveyor Name: _____ Phone: _____ Email: _____

Date: _____ Time conducted: _____ to _____ p.m. Location: _____ Town/Village: _____

Trail surface: asphalt ☐ stone dust ☐ Weather Conditions: sunny ☐ partly cloudy ☐ cloudy ☐ partly rainy ☐ rain ☐ Approximate temperature: _____

Make one "tic mark" for each person passing by in either direction engaged in each activity.

User Type	Counts	
	With helmets	Without helmets
Bicyclists		
Bicyclists with child in seat or trailer One tic for each person		
Tandem bicycles One tic for each person		
Recumbent cycles		
Tricycles		
Hand-powered cycle		
Walkers		
In-line skaters		
Baby carriages/ Strollers One tic for each person in stroller or carriage. List person pushing as a walker.		
Equestrians		

Thanks for you help!!! Please return the form(s) to:
Canalway Trail User Count 2012, Parks & Trails New York, 29 Elk Street, Albany, NY, 12207, 518-434-1583, FAX 518-427-0067

APPENDIX C: TRAIL USER SURVEY

Thank you for agreeing to take part in a benchmark study of the economic impact of the Erie Canalway Trail. Completing this questionnaire takes less than 10 minutes. Your participation will be kept 100% anonymous by Dr. Scipione and his students at SUNY Geneseo. This study is being sponsored by the statewide not-for-profit Parks & Trails New York. If you would like any information about the study, please e-mail:

Dr. Scipione at scipione@geneseo.edu

There are 50 questions in this survey

Geographic Location

Before you begin taking the survey, please select the area the flyer was given to you. This will allow us to aggregate your answers along with others from the same region. Please remember that your answers are anonymous, and that at any time if you do not wish to answer, please simply skip the question.

Q1: Please select the area:

Please choose **only one** of the following:

- ☐ Buffalo Waterfront, The Tonawandas, Pendleton
- ☐ Downtown Lockport to Albion
- ☐ Albion to Rochester (west of the Genesee River)
- ☐ Rochester to Newark
- ☐ Port Byron to Camillus
- ☐ DeWitt to Oneida
- ☐ Oneida to Oriskany
- ☐ Oriskany to Herkimer
- ☐ Herkimer to Canajoharie
- ☐ Canajoharie to Amsterdam
- ☐ Amsterdam to Schenectady
- ☐ Schenectady to Trail-end at Hudson River in Waterford
- ☐ Cohoes to Albany

User Demographics

This section will allow us to identify the unique characteristics of each user group surveyed. With that, we can create an interactive, projectable model of the spending and usage patterns for current and future trail users.

Q2: What is your zipcode?

Please write your answer here:

-

Q3: Are you vacationing in the area, away from your home?

Please choose **only one** of the following:

- ☐ Yes
- ☐ No

Q4: Please choose the appropriate response for each item:

	5 miles	6-10 miles	11-15 miles	16-20 miles	20-30 miles	30-40 miles	40+ miles
Roughly, how far away from the part of the trail you visited, do you live?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q5: If you regularly make a vacation along the trail, how many times, per year, do you do so?

Only answer this question if the following conditions are met: (Q3 = "Y")

Please write your answer here:

-

Q6: How do you generally get to the trail entrance?

Please choose **only one** of the following:

- ☐ Car/Truck/Van
- ☐ Bike
- ☐ Walk
- ☐ Horseback
- ☐ Other

Q7: How would you rate the parking at the trail?

Only answer this question if the following conditions are met: (Q6 = "1")

Please choose the appropriate response for each item:

	Availability	Cost
Excellent	<input type="radio"/>	<input type="radio"/>
Good	<input type="radio"/>	<input type="radio"/>
Fair	<input type="radio"/>	<input type="radio"/>
Poor	<input type="radio"/>	<input type="radio"/>

Q8: My gender is . . .

Please choose **only one** of the following:

- ☐ Female
- ☐ Male

Q9: My age is...

Please choose **only one** of the following:

- ☐ 18-29
- ☐ 30-39
- ☐ 40-49
- ☐ 50-69
- ☐ 70-79
- ☐ 80+

Q10: What activities do you engage in along the trail?

Please choose **all** that apply:

- ☐ Walking/Hiking
- ☐ Biking
- ☐ Horseback
- ☐ Running
- ☐ Walking a pet
- ☐ Bird Watching

- ☐ Skiing
- ☐ Snowmobiling
- ☐ Rollerblading
- ☐ Boating
- ☐ Other:

Q11: Of those you checked off, which is your most common activity on the trail?

Please choose **only one** of the following:

- ☐ Walking/Hiking
- ☐ Biking
- ☐ Horseback
- ☐ Running
- ☐ Walking a pet
- ☐ Bird Watching
- ☐ Skiing
- ☐ Snowmobiling
- ☐ Rollerblading
- ☐ Boating
- ☐ Other

Q12: Which of these statements best fits your use of the trail?

Please choose **only one** of the following:

- ☐ I usually travel the trail alone.
- ☐ I travel the trail alone more often than with others.
- ☐ I travel the trail about equally -- alone and with others.
- ☐ I travel the trail with others more than
- ☐ I usually travel the trail with others.

Q13: How many people do you generally travel with?

Only answer this question if the following conditions are met: (Q12 = "3" or Q12 = "4" or Q12 = "5")

Please choose **only one** of the following:

- ☐ 1 companion
- ☐ 2-3 companions
- ☐ 3-7 companions
- ☐ >7 companions

Q14: When do you primarily use the trail?

Please choose **only one** of the following:

- ☐ Weekday
- ☐ Weekend
- ☐ Both

Q15: How often, on average, do you use the trail?

Please choose **only one** of the following:

- ☐ Daily
- ☐ Between 3-5 times a week
- ☐ 1 or 2 times a week
- ☐ A couple of times a month
- ☐ Once a month
- ☐ Few times a year
- ☐ First time

Q16: How many in your group are between

Only answer this question if the following conditions are met: (Q12 = "2")

Please choose the appropriate response for each item:

	1	2	3	4	5
18-29	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
30-39	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
40-49	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
50-69	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
70-79	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
80+	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q17: Are there any children with you under the age of 15?

Please choose **only one** of the following:

- ☐ Yes
- ☐ No

Q18: When you travel the trail, how often are children under the age of 15 with you?

Only answer this question if the following conditions are met: (Q17 = "Y")

Please choose the appropriate response for each item:

	1	2	3	4	5
Always	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Frequently	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Seldom	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Never	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q19: What is you and your spouse's highest levels of education?

Please choose the appropriate response for each item:

	Your level of education	Spouse's level of education
Less than High School Diploma	<input type="radio"/>	<input type="radio"/>
High School Diploma	<input type="radio"/>	<input type="radio"/>
Some College	<input type="radio"/>	<input type="radio"/>
2 year degree	<input type="radio"/>	<input type="radio"/>
4 year degree	<input type="radio"/>	<input type="radio"/>
Graduate or Professional school	<input type="radio"/>	<input type="radio"/>
Not married	<input type="radio"/>	<input type="radio"/>

Q20: Please choose the appropriate response for each item:

	More active	About as active	Less active
Compared to my age group, I am:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Trail Usage and Spending Patterns

These characteristics will allow us to predict with relative accuracy the spending power of different demographics along the trail, as well as the current usage patterns.

Q21: When do you use the trail?

Please choose **all** that apply:

- ☐ Weekday Mornings
- ☐ Weekday Midday
- ☐ Weekday Afternoons
- ☐ Weekday Evenings
- ☐ Weekend AM
- ☐ Weekend PM

Q22: How much time do you spend on the trail during a typical visit?

Please choose **only one** of the following:

- ☐ Less than 30 minutes
- ☐ 30-60 min
- ☐ 60-120 min
- ☐ >120 min

Q23: Would you consider your use of the trail to be primarily for:

Please choose **only one** of the following:

- ☐ Recreation
- ☐ Health and Exercise
- ☐ Commuting to job
- ☐ Traveling to somewhere else
- ☐ Fitness training
- ☐ Tourism
- ☐ Other

Q24: If you commute, how far is your typical journey, one way in miles?

Only answer this question if the following conditions are met: (Q23 = "3" or Q23 = "4")

Please choose **only one** of the following:

- ☐ 1-5 mile
- ☐ 6-10 mile
- ☐ 11-20 mile
- ☐ More than 20 miles

Q25: What seasons do you make use of the trail?

Please choose **all** that apply:

- ☐ Spring
- ☐ Summer
- ☐ Fall
- ☐ Winter

Q26:

	How much would you estimate your expenditures to be per trip?	How many times, in a year, do you participate in each of these activities listed to the left?
Walking/Hiking		
Biking		
Horseback riding		
Running/Jogging		
Walking a Pet		
Bird watching		
Skiing in winter		
Snowmobiling		
Rollerblading		
Casual boating on the canal		
Traveling along the canal by boat		

Q27: Let's start with the money that you spend for products and services on the days that you actually use the trail, no matter what the activity. In the two column below, please tell us: (1) what activities you ever engage in along the trail; (2) about how many times you engage in that kind of activity along the trail; and (3) the approximate amounts you spend on various products and services. You will only have to do this for the activities that you actually engage in along the trail.

	What is the activity?	How many times do you engage in the activity in a year?	How much do you spend per visit to the trail?
1			
2			
3			
4			
5			
6			
7			

Q28: Then there are the longer-term expenses of various kinds of outdoor activities. You mentioned that you bicycle and go cross-country skiing along the trail. About how much do you spend each year on the various kinds of longer-term expenses listed below?

	Spending
Buying a new or used bicycle	
For bicycle repairs	
For bicycle accessories	
Any other costs related to bicycling	
Buying or renting cross-country skis & poles	
Ski clothing	
Footwear for skiing	

Q29: Previously in the survey, you indicated what your primary activity along the trail was. Please fill out the following questions with sole regard to that activity.

Only answer this question if the following conditions are met: (Q3 = "N")

	Total expenditures within one typical visit to the trail:
Motel, hotel, cabin or B&B	
Camping fees	
Restaurants & bars	
Groceries, take-out food/drinks	
Gas & oil	
Other vehicle expenses	
Local transportation	
Admissions & fees (i.e. amusement parks, entrance fees to state parks, etc.)	
Clothing	
Sporting goods	
Gambling	
Souvenirs and other expenses	

Q30: Previously in the survey, you indicated that you were visiting the trail while vacationing. Please fill out the following questions with sole regard to that activity.

Only answer this question if the following conditions are met: (Q3 = "Y")

	Total expenditures while on vacation
Motel, hotel, cabin or B&B	
Camping fees	
Restaurants & bars	
Groceries, take-out food/drinks	
Gas & oil	
Other vehicle expenses	
Local transportation	
Admissions & fees (i.e. amusement parks, entrance fees to state parks, etc.)	
Clothing	
Sporting goods	
Gambling	
Souvenirs and other expenses	

Other Trail Plans

Q31: Do you ever take overnight or longer trips along the Erie Canalway Trail?

Please choose **only one** of the following:

- ☐ Yes
- ☐ No

Q32: How many nights did you, or do you plan to, stay away from home?

Only answer this question if the following conditions are met: (Q31 = "Y")

Please write your answer here:

-

Q33: In what category of residence did you stay in during your visit to the Canal Trail?

Only answer this question if the following conditions are met: (Q31 = "Y")

Please choose **only one** of the following:

- ☐ Hotel or Motel
- ☐ Bed and Breakfast place
- ☐ Campground
- ☐ Staying with family or friends

Q34: How much did you spend per night on overnight accommodations?

Only answer this question if the following conditions are met: (Q31 = "Y")

Please write your answer here:

•

Q35: How many people are in your overnight party?

Only answer this question if the following conditions are met: (Q31 = "Y")

Please write your answer here:

•

Q36: There are a number of organizations, including our client Parks & Trails New York, that organize multi-day bicycling trips along the trail. Which of the answer categories below best describes your experiences with or interests in such bicycling excursions.

Please choose **only one** of the following:

- ☐ Have taken such a trip before and hope to again
- ☐ Have taken such a trip before and probably won't again
- ☐ Have not taken such a trip before but would be interested in one
- ☐ Could not at this time take such a trip

Q37: Was the Trail a strong factor in your decision to stay in or visit the area?

Only answer this question if the following conditions are met: (Q3 = "Y")

Please choose **only one** of the following:

- ☐ Yes
- ☐ No

Q38: What attributes along the Trail attracted you to visit it?

Only answer this question if the following conditions are met: (Q37 = "Y") and (Q3 = "Y")

Please choose **all** that apply:

- ☐ Biking excursions
- ☐ Affordability
- ☐ Natural Scenery
- ☐ Environmental Quality
- ☐ Tranquility
- ☐ Other:

Q39: If not, what was the primary factor that caused you to vacation in the area?

Only answer this question if the following conditions are met: (Q37 = "N") and (Q3 = "Y")

Please choose **only one** of the following:

- Proximity to family
- Affordability
- Enhancement of family relationships
- Facilitation of social interaction
- Other

Q40: How interested would you be in biking along a significant (greater than 50 miles) portion of the trail?

Please choose **only one** of the following:

- Very interested
- Somewhat interested
- Not very interested
- Not at all interested
- Not applicable

Q41: How did you first find out about the trail?

Only answer this question if the following conditions are met: (Q3 = "Y")

Please choose **all** that apply:

- ☐ Word of mouth
- ☐ Roadside signage
- ☐ Driving past
- ☐ Live by the trail
- ☐ Trail kiosk
- ☐ Newspaper
- ☐ Magazine
- ☐ Bike shop
- ☐ County tourism office
- ☐ Tourist agency
- ☐ PTNY Cycling the Erie Canal guidebook
- ☐ PTNY website
- ☐ NYS Canal Corporation website
- ☐ Internet search
- ☐ Other:

Q42: If you planned to stay overnight, where would you most likely stay?

Only answer this question if the following conditions are met: (Q31 = "N")

Please choose **only one** of the following:

- ☐ Hotel
- ☐ Bed and Breakfast
- ☐ Motel
- ☐ Campground

Q43: How did you plan your vacation?

Only answer this question if the following conditions are met: (Q3 = "Y") or (Q31 = "Y")

Please choose **all** that apply:

- ☐ Map
- ☐ Roadside signage
- ☐ County tourism office
- ☐ Tourist agency
- ☐ PTNY Cycling the Erie Canal guidebook
- ☐ Canalway Trail interactive map on PTNY website
- ☐ NYS Canal Corporation website

- ☐ Internet search
- ☐ Other:

Q44: What was the name of the tourism agency that you hired?

Only answer this question if the following conditions are met: (Q43_4 = "Y")

Please write your answer here:

Q45: Are you now or have you ever been a member of a bicycling, hiking, jogging, walking or other outdoor-oriented club?

Please choose **only one** of the following:

- ☐ Yes
- ☐ No

User Traits

Listed below are a number of short statements about your activities along the Erie Trail. Please tell us how much each statement describes your experiences, preferences and views using the following 4-point answer scale:

Q46: Please choose the appropriate response for each item:

	Definitely Does	Does Somewhat	Not Very Well	Not at all
I usually start and stop my trips along the trail at the same place				
There are indoor people and outdoor people: I am definitely an outdoor person.				
Some of the best places to exercise, like the trail, are very inexpensive.				
I prefer linear type trips along the trail, starting and stopping from different places.				
My activities along the trail are mainly for personal fitness and health.				
I prefer exercising within parks rather than traveling from Point A to Point B.				
Biking, running or doing other things along along the trail are a way to have fun with friends and family.				
I am a person who has trouble following signs and maps.				
I am interested in the history of the Erie Canal and specific historical spots along the trail.				
You meet nice people along the trail and seldom if ever have to worry about your safety.				
Overall, outdoor activities along the trail have had a very positive effect on me.				

Final Questions

Q47: Do you generally exit from the trail in the same place that you started?

Please choose **only one** of the following:

- ☐ Yes
- ☐ No

Q48: Do you prefer the linear layout of the Trail, as opposed to more traditional, confined parks?

Please choose **only one** of the following:

- ☐ Yes
- ☐ No

Q49: My current work status is...

Please choose **only one** of the following:

- ☐ I work fulltime
- ☐ I work part-time
- ☐ I am looking for work
- ☐ I am retired
- ☐ I am a student

Q50: My approximate annual household income is . . .

Please choose **only one** of the following:

- ☐ Less than \$10,000
- ☐ \$10,000 to \$24,999
- ☐ \$25,000 to \$34,999
- ☐ \$35,000 to \$49,999
- ☐ \$50,000 to \$74,999
- ☐ \$75,000 to \$99,999
- ☐ \$100,000 to \$149,999
- ☐ \$150,000 to \$199,999
- ☐ \$200,000 or more

Thank you for taking the time to provide your opinions and suggestions! If you would like more information about Parks & Trails New York or the Canalway Trail or would like to order PTNY's guidebook, Cycling the Erie Canal, please visit www.ptny.org. Also connect with us on [Facebook](#) and [Twitter](#).

Submit your survey.

Thank you for completing this survey.

APPENDIX D: BUSINESS OWNERS SURVEY

Thank you for helping us study how the owners of businesses in communities along the Erie Canal Trailway are impacted by people who use the Trail. Completing this questionnaire takes less than 10 minutes. Your participation will be kept 100% anonymous by Dr. Scipione and his students at SUNY Geneseo. This study is being sponsored by the statewide not-for-profit Parks & Trails New York. If you would like any information about the study, please e-mail Dr. Scipione.

There are 19 questions in this survey

Business demographics

Q1: Which of these categories best describes your business?

Please choose **only one** of the following:

- ☐ Hotel and Lodgings
- ☐ Outdoor store
- ☐ Bicycle shop
- ☐ Restaurant - Fast Food
- ☐ Restaurant - Other
- ☐ Convenience store
- ☐ Gas station
- ☐ Retail/gift/specialty store
- ☐ Sporting Goods store
- ☐ Drug store/Pharmacy
- ☐ Supermarket
- ☐ Medi/Emergency Center
- ☐ Local Transportation
- ☐ Auto Service
- ☐ Bar
- ☐ Recreation or Amusement
- ☐ Other

Q2: Is your business locally owned or part of a national or regional chain?

Please choose **only one** of the following:

- ☐ Locally owned
- ☐ Part of a national/regional chain

Q3: How many years have you operated at your location?

Please write your answer here:

Q4: Which of these categories contains your approximate total annual revenue?

Please choose **only one** of the following:

- ☐ Less than \$500,000
- ☐ \$500,000 to \$999,999
- ☐ \$1 million to \$1.99 million
- ☐ \$2 million to \$2.99 million
- ☐ \$3 million to \$4.99 million
- ☐ \$5 million or more

Q5: Overall, what kind of financial impact do people who use the Canalway Trail have on your business?

Please choose **only one** of the following:

- ☐ A big financial impact
- ☐ A moderate financial impact
- ☐ A small financial impact
- ☐ Little or no impact

Q6: Why do you feel that the trail had this financial impact of the Trail on your business? Anything else?

Please write your answer here:

Q7: Parks & Trails New York, several state agencies, various Chambers of Commerce and local tourism officials in communities along the trail all promote use of the Erie Canalway Trail. In general, how effective do you think these promotional efforts have been?

Please choose **only one** of the following:

- ☐ Very effective
- ☐ Somewhat effective
- ☐ Not very effective
- ☐ Not at all effective

Q8: Why do you feel that way about current efforts to promote more usage of the Erie Canalway Trail? Do you have any specific examples?

Please write your answer here:

Estimating future impact

Now we have a few questions about how, if at all, your business would be affected if the number of users, and the local spending of those users, are increased. One important way of measuring economic impact is by whether or not you would need to hire more employees if your business revenue grows. Let's take a look at three scenarios.

Q9: What would be the impact if greater spending by people using the Erie Canalway Trail were to increase your annual revenue by 5%? Would you be:

Please choose **only one** of the following:

- ☐ Very likely to hire more employees
- ☐ Somewhat likely
- ☐ Not very likely
- ☐ Not at all likely to hire more employees.

Q10: If there is any possibility that you would hire more employees (an answer of 1, 2 or 3 on Q9 above) based on a 5% increase in business: Would you be likely to hire (circle all that apply):

Please choose **all** that apply:

- ☐ Hire a few PT worker(s)
- ☐ Hire new FT employee(s)
- ☐ Upgrade current PT's to FT's
- ☐ Other:

Q11: What would be the impact if greater spending by people using the Erie Canalway Trail were to increase your annual revenue by 10%? Would you be:

Please choose **only one** of the following:

- ☐ Very likely to hire more employees
- ☐ Somewhat likely
- ☐ Not very likely
- ☐ Not at all likely to hire more employees.

Q12: If there is any possibility that you would hire more employees (an answer of 1, 2 or 3 on Q11 above) based on a 10% increase in business: Would you be likely to hire (circle all that apply):

Please choose **all** that apply:

- ☐ Hire new PT worker(s)
- ☐ Upgrade current PT's to FT's
- ☐ Hire new FT employee(s)
- ☐ Other:

Q13: Finally, let's think about what might happen if greater spending by more people using the Erie Canalway Trail were to increase your annual revenue by 15%? Would you be:

Please choose **only one** of the following:

- ☐ Very likely to hire more employees
- ☐ Somewhat likely
- ☐ Not very likely
- ☐ Not at all likely to hire more employees.

Q14: If there is any possibility that you would hire more employees (an answer of 1, 2 or 3 on Q13 above) based on a 15% increase in business: Would you be likely to hire (circle all that apply):

Please choose **all** that apply:

- ☐ Hire a few PT workers
- ☐ Upgrade current PT's to FT's
- ☐ Hire new FT employees
- ☐ Other:

Q15: One suggestion on how to better promote and market the Erie Canalway Trail is to have close coordination between state government agencies, local and county governments, Chambers of Commerce and local business owners like yourself. How interested would you be in participating in such a partnership to better promote the Trail? Would you be:

Please choose **only one** of the following:

- ☐ Very interested
- ☐ Somewhat interested
- ☐ Not very interested
- ☐ Not at all interested

Q16: Before the interview, how much would you say you knew about the Erie Canalway Trail and its users as potential customers? Would you say that you:

Please choose **only one** of the following:

- ☐ Knew a lot about the trail
- ☐ Knew a few things
- ☐ Knew only a little about the trail
- ☐ Knew nothing about the trail

Q17: Do you offer shipping services?

Please choose **only one** of the following:

- ☐ Yes
- ☐ No

Q18: What actions have you taken to attract or cater to trail users?

Please write your answer here:

Q19: Do you have any suggestions about how to attract more users to the Erie Canalway Trail and to business owners in communities along the way?

Please write your answer here:

Thank you for taking the time to give PTNY your opinions and suggestions! If you would like more information from PTNY, please contact them at:

Ms. Robin Dropkin or Ms. Frances Gotcsik
Parks & Trails New York
29 Elk Street
Albany, New York 12207
518-434-1583
ptny@ptny.org

Submit your survey.
Thank you for completing this survey.

APPENDIX E: VERBATIM COMMENTS OF LOCAL BUSINESS OWNERS ALONG THE ERIE CANALWAY TRAIL: FALL 2012 SURVEY

Responses to Q6: Why do you feel that the trail had this financial impact of the Trail on your business? Anything else?

"Probably a certain percentage of our food shoppers are also users of the Erie Trail, but this is kind of hard to track."

"Some of the bicycles we sell are used on the trail, plus probably some of the cycling clothing and helmets we sell."

"Sales that are directly related to the Erie Canalway Trail are maybe 2% of our total sales, but that is still significant. We also get sales from people on the suburban trains and buses in this city. But it's kind of hard to provide detailed dollar amounts."

"Our guest-timate is that approximately half of our bicycle and jogging related items come from people who run or cycle along the Erie Trail."

"We seem to be getting more travelers along the trail lately. And many of our local customers are also users of the trail."

"People come to the trail and have a good time. Many people tend to stay overnight or for several days and we offer good lodging."

"We have 80 rooms and a restaurant. On nice summer and fall weekends, maybe 11 to 20 of our rooms are people who are here to enjoy the Erie Canal Trail. But we get the feeling that more of them come here through our own promotional efforts than what the state is doing. Promotional efforts have actually gone down under Cuomo."

"We are getting a small but growing source of revenue from the canal and trail. Our location in Buffalo, only a few blocks from the trail, is one of our strengths."

"We get a few out-of-towners from the trail and probably a lot of our local people use the trail, but it isn't obvious."

"Why would joggers or bikers on the trail come in to buy our picnic tables or patio furniture? Why are we in your sample?"

"Our trail business picks up each year, especially during the summer, as much as 15% to 20%, from the Erie Trail. Lots of people fall off their bike or collide with someone else and skin their knee or elbow. Sometime we get people with broken bones. Frankly we didn't anticipate something like the trail generating new patients for us, but we are pleased that we can help these people."

"Only a few get gas from our station because most of them are probably local and don't even burn a gallon of gas round-trip to get to the trail from home. So we don't really expect much business from trail people."

"It could be a bigger sales impact, but we don't usually ask customers where they are coming from. But you can sometimes see an uptick in the summer from trail business."

"We get four or five bikers or runners each month with injuries, mostly minor. This happens most during the warm summer months."

"The nearby Erie Trail seems to attract fitness enthusiasts and families who usually stop by to fill up on gas and buy snacks."

"It's hard to measure how many customers are from the trail and you can't ID people just because they come in wearing bicycling or running clothes."

"We have a restaurant and bar as well as 100 rooms at our hotel. On a typical spring or summer night we maybe have two or three rooms with trail users -- but this is only during the warm months."

"When there is a special canal or trail event, we see our business go up by as much as 25% to 50%, but only on the day before, the day after and the day(s) of the special event."

"Regular customers come in and mention that they are getting meds for a canal or trail trip. And during the busy summer season, maybe a few times a month we get someone from out-of-town coming into our drugstore from the trail."

"Our business is not related to the trail at all."

"We get 2 or 3 injured or sick trail riders a day during the summer season. Sometimes even more."

"Maybe \$100k-\$200k annually from trail users. We would like to attract even more, since we are only one block from the canal trail."

"Sometimes families or groups of bicyclists who are traveling along the trail come here for meals or treats after a ride."

"We make items and crafts as well as sell them. Our customers tend to be older persons, so we do get older persons who are traveling along the trail."

"We are mainly a chicken and BBQ place with middle-range prices and great service. We get a few couples and families in here from the trail. But sometimes it's hard to tell if a customer is from the trail."

"The Erie Trail is half a mile away, so we don't get much trail business, although we do have local customers who know us and we know them."

"In the warmer seasons, at least two or three of the rooms in our bed & breakfast are filled with people bicycling down the trail."

"They have little awareness of our restaurant, since we are not located right on the canal (the canal and trail are 1.5 blocks away)."

"We are too far away from the canal and canal trail."

"Year-round we get the local bicyclists who are out on the trail, plus in the summer we get some long distance cyclists from the trail."

"A few trail users ask to park their car or truck at our station."

"There are a lot of bicycle riders in the Pittsford area. They make up at least 33% of our customers, but most are just local families who come in here."

"People who come in from the trail are easy to spot by their exercise outfits. We get some, but we could sure use more."

"In the warm summer months, we get maybe 5 to 10 calls a week for our cabs to pick people up or leave them off along the trail."

"We get our regular local customers, not people from the trail, although some of them might go on the trail. Our repair services are mainly for local residents."

"We can tell they are from the trail because they are wearing jogging or bicycling shoes or clothing."

"During the busy season (May until September) our bike shops sells about 15 to 20 new bikes each week -- about half are bought by people who are repeat customers, the other half to new customers. Maybe some of them got to know us when they pedaled along the Erie Trail."

"People from the trail use the canal and vice versa."

"We are two blocks from the trail and get trail people just about every day. And they spend pretty good too. How about helping us get more!"

"Trail users probably buy at least 50% of the new bikes we sell here, but many of them become trail users only after they buy their new bikes."

"We get a few bicycle guys in here after their ride. They are all thirsty for a cold beer. But we don't get much else from the trail."

"Our restaurant caters almost entirely to Erie Trail users."

"Trail users come here to fulfill their big appetites after a long ride along the trail."

"People are curious about all the historical sites."

"People on the trail use all kinds of sporting equipment to hike, bike, ski and snowmobile and we carry all kinds of sporting equipment for them."

"Every summer we see people from all parts of the country. We also see quite a few foreign visitors too."

"We have six rooms. Most nights we fill about four. Overall, we get about 10% to 15% of our business from trail users."

"Vacationers, business men and women, families, bikers, etc. A wide diversity of people travel through our town and stop in to eat. Canajoharie is in the middle of the trail. They travel the trail both ways."

"People living and traveling along the trail make up most of my business, so the trail is very important. But this year our business has been particularly hard-hit. So it must be the recession and people cutting back on both vacations and recreation."

"People who stay at our bed & breakfast are almost always people who first saw us during a earlier trip passing along the trail or canal."

"We are a close walking distance from the trail and so we get at least a few trail users most days."

"Approximately 15% to 20% of the visitors to our B&B come from the Erie Canalway Trail. So the trail has a fairly big \$\$ impact on our place."

Responses to Q8: Why do you feel that way about current efforts to promote more usage of the Erie Canalway Trail? Do you have any specific examples?

"There are special trail events in our area of New York State"

"I don't see much promotion of the trail. Am I looking in the wrong media?"

"It's hard to measure quantitatively, but it is my definite impression that trail traffic is increasing. We are getting more inquiries."

"Where are the ads on tv, radio or in the newspapers? We don't see much of anything here in the Syracuse area."

"Folks just come in and tell us about biking the trail."

"Everybody is after tourist dollars these days so the competition is great. And recreation is supposed to solve our health problems. So there needs to be more trail promotion."

"I feel the efforts to promote the trail are superb, at least here. I saw a couple ads on TV encouraging families to use the trail for their summer vacations."

"We do more to promote the trail locally than the state does. This has NOT improved under Cuomo. Bring back Pataki!"

"Maybe we don't see much promotion of the trail because we haven't looked for the ads, but we will certainly look more closely now."

"Heard about the recent break in the canal and its impacts on trail traffic. But we haven't heard much else."

"Business has been up each year along the canal. So that's good news."

"There are many places here in Brockport that have travel brochures and fliers, but I never see any for the Erie Trail."

"I think they have signs and brochures about the trail, but I am not sure."

"Our walk-in clinic could be getting even more business from the trail, IF the trail people would do a better job to promote it."

"The state has to get itself organized and make an effort to improve the trail and then use mass media as much as possible to reach not only existing users but new trail users too."

"We have been here 15 years and I haven't seen much of an uptick. But maybe other portions of the trail are more heavily marketed."

"We don't expect much business from people along the trail, but we would like to get more than we are right now. I don't think there will be any sudden surges, though."

"Based on personal experience after 7 years at this location, I don't see much promotion of the trail. But I can think of a number of good solutions myself."

"We hear that trail traffic is up 10% to 15% here in Newark, but is this coming from more promotion? I don't really know much about the promotional efforts. Are there any?"

"I have been out on the trail myself, but I hardly see any advertising or even new signs."

"Our ACC (ambulatory care center) was not started with the trail segment in mind, but our location means that we get them and now they are an important and growing part of our business."

"The numbers are increasing, but with 19 million people living in New York State, we should be able to get a lot more business from a lot more trail users."

"We don't see much of what they do and it is kind of hard to prove that what they do pushes specific kinds of people in the door."

"Our business from the trail has actually been up 10% to 15% in the last couple of years, even with the Obama Disaster. Without the Obama Disaster, our business from the trail would probably be great."

"No changes, year to year."

"Because travel volume on the trail seems to be increasing, although we don't have exact figures. Show us the money!"

"We put together "boater bags" which are given to all boats who stay overnight. There is also growing awareness that it's worth tying up at the docks in our town."

"Informing the public about the canal and canal trail."

"These are just my own impressions, but a lot more could be done to promote the trail, both locally and to visitors from afar."

"I seldom see any literature or commercials on the radio about the Erie Canalway Trail."

"Everyone know where the trail is. The signs are ok, although more and better signs are needed. And traveling the trail is quite safe. But it needs more promotion, both from the state and from counties."

"Like I said before, we could use more customers from the trail."

"There seems to be a bit more growth in people on the trail here, but its spotty and inconsistent. More bucks need to be spent to get the word out."

"We don't see any publicity about the Erie Trail."

"We haven't seen much of an uptick in spending by trail people, but that's not necessarily bad - we have always depended on loyal local customers."

"Our numbers are up a bit, but the folks in Albany need to do a lot more."

"They do come in the door, but not often enough."

"We are doing ok here, but the state and county folks need to do a lot more to promote the trail. How about the winter season? Why stop promoting in the winter? For much of the winter the trail is clear of snow. And when there is snow, there are snow mobilers and cross-country skiers."

"We don't see too many people from the trail in our business, at least not that we can tell. They don't always dress differently or make it obvious that they are on the trail."

"I think that the state agencies could advertise more on how the Trail can provide wholesome, inexpensive fun for families."

"I think the agencies need to up the ante in their efforts to get more New Yorkers and visitors from out of state on the trail and physically active. It is good for everyone."

"I have tried for two years to get the NYS Thruway Authority to post signs to the trail at exits 45 and 46 -- but to no avail. When are they going to get their act together? The trail in the Rochester area has so much to offer."

"Our trail business has increased fairly steadily over the past 5 years, so their promotions must be working at least a little. How about even more!"

"We are a member of the local Chamber of Commerce and have personally petitioned the state government on several occasions to increase Thruway spending to promote the trail. What the heck are they waiting for?!"

"Have tried to generate local interest in the past. But have found local governments and business groups unhelpful and abrasive."

"We worked with the Chamber of Commerce for years. While they do advertise, their messages are just not jumping out at potential tourists. They need to do a more professional job of advertising."

"The Trail will be featured in this coming year's county tourism brochure."

"Because our business from trail travelers has been going up during the past few summers, we assume that the promotion folks are getting better at their job."

Responses to Q18: What actions have you taken to attract or cater to trail users?

"Co-sponsor a couple local fitness events on the trail. With all the concerns about the fitness of Americans, fitness should be the major point to drive home about the trail."

"Offer discounts on a few items or activities."

"Trail traffic will probably never be more than a few percentage points of our total revenue, but that would still be significant."

"Move the trail closer to our movie complexes!"

"Offer better bicycles and accessories."

"We are one of several local businesses that sign up to help keep the trail cleaner in the summer."

"We are a nation chain so it is very easy for us to cater to trail users. We provide high quality lodging at an affordable price. We attract families to the trail."

"They can store their bikes and other gear in their rooms, no problem. We encourage them to make our hotel their base of operations. And we always give them a hearty breakfast too."

"The Trail Book should have listings for EVERY medi-center along the 300+ miles, with or without display ads. Knowing where the medicenters are given them confidence to make longer trips on the trail."

"No special actions."

"We keep our place open 15 hours a day, no appointment necessary, even on weekends."

"Just by word of mouth. I am too busy running my station to have the time to do marketing too."

"Nothing really. But hopefully by word of mouth. Plus you can see our restaurant from the trail, which should be a big advantage."

"We will take out a display ad in the next issue of PTNY's Cycling Guide Book."

"We just give them a great meal and great service, like all of our other customers. Then hope that word of mouth spreads everywhere."

"Put our hotel flier and photos in brochures at the county tourism center."

"We offer free milk shakes and cones on weekends."

"Just make sure that our pharmacy is within half a block of the trail! We haven't had to move it yet!"

"Mention the trail in the brochure we give to all new and prospective patients."

"We have added more sports drinks and candy bars. And we have also cut way back on cigarette sales."

"If you could guarantee 15% more in dollars to us, we will figure out all kinds of exciting promotions for folks on the Erie Trail."

"Offer more items that have the trail name on them for out-of-staters."

"We named a couple items on our menu on the canal and trail."

"Nothing really. How about NYS showing us the added business first."

"We often ship home items that our guests purchase on their vacations. But that service is not specifically for just trail users."

"We have placed advertisements on boater bags which are given to all boats that stay overnight in our town, including discounts on meals."

"Put small display ads in local restaurant menus. Sponsor a couple trail rides along with the local bicycle club."

"We let them park for free at our gas station. But if I get a lot of them, I will have to start charging for parking."

"I suppose we could start shipping parts to a bicycle customer who breaks down somewhere along the trail."

"Keep our prices down and sell stuff with the name of our village on them. Tourists like stuff with town names on them."

"We have our telephone on posts and signs on the trail."

"Nothing special, but we get marketing plans from our company's owners."

"We give out free maps of the trail to those who want them. That is pretty popular."

"We stock more energy foods and drinks. We also stock first aid supplies in small packs that make them easy to carry on bicycles."

"Our shop area is kind of small, so a 15% increase in business would really stretch us. We might have to add more space."

"Nothing -- you got any ideas?"

"We set up a stall during the Fourth of July Festival in downtown Albany to advertise our restaurant."

"We joined all the various trail organizations and went on their website for more visibility. We also started offering storage of transportation gear and a boat dock."

"Billboards. We also talked more with trail users, advertised in fliers and also boosted word of mouth."

"We are advertising, but only locally."

"We are a married couple with a bed & breakfast, so we don't have a lot of bucks for marketing and promotion. But we always take out local ads."

"Have worked with local Chambers of Commerce and other business groups (mainly B&Bs) to promote our business. Help!"

"We have put up additional signs in town to attract visitors and advertised in local events (plays, music festivals, etc)."

"Local advertising and collaborating with other businesses, for instance during biking weekend, to generate more traffic."

"We are stocking more books about the trail and more trail souvenirs."

"A 15% increase would be hard for us to handle with only 4 rooms. We might be able to add just one more room."

Responses to Q19: Do you have any suggestions about how to attract more users to the Erie Canalway Trail and to business owners in communities along the way?

"If trail traffic were actually able to boost our sales by 15%, we would have to hire a lot more people."

"Get more local businesses to tie into the trail. We are a national retailer. I think we read something recently about a campaign to boost business along the Erie Canalway Trail."

"Finish modernizing the trail -- paving, lighting, signs, etc. Do it the entire length of the trail -- from Buffalo to Albany."

"Give all local merchants a copy of the PTNY Cycling the Trail Guidebook."

"Encourage more local businesses like ours to advertise in your trail book & map."

"Come up with an advertising budget and then find a good advertising agency. Do a real professional job of promoting the trail. And bring back Gov. Pataki!"

"Our medi-center staff could put on fitness clinics for local runners and bicyclists."

"Offer annual Trail Days."

"Don't pave the trail so we get more running and bicycling injuries. Hey, just kidding!"

"Put up bigger and better signs where the trail starts and ends and to announce each sector of the trail. Encourage non-profits to use the trail for big annual fund raisers."

"Convince vacationers to save money by keeping their vacations within New York State."

"Add more attractive and more numerous trail signs."

"Hold special events along the trail for local families that end up at our restaurant."

"Pave the rest of the canal trail and get it off the highways. Develop more attractive signs and maps along the way."

"Better signs, better parks and more lights along the trail."

"Run PSAs on every television station in the State of New York."

"Bigger signs and parking lots and pave ALL of the trail."

"Host a couple annual races on the trail for bike riders and runners."

"We are not marketing experts. We need professional help."

"Make the trail wider so more people can use it. And come up with some better signs. Some people don't even recognize the signs or Trail."

"Hold meetings or focus groups with the owners of local businesses along the trail."

"Use TV commercials more, both in neighboring states and across New York State."

"Hold more special annual events."

"Take it more seriously. Bicycling will grow because people need to be more active. Because we can't afford the skyrocketing rates of Diabetes, obesity and other diseases."

"How about more & better signs?"

"Anything that grows bicycling and running is going to bring more people to the Erie Trail -- and hopefully to us."

"If trail traffic could boost our business by 10% to 15%, we would have to put two or three more cabs on the road. And that means more jobs!"

"Better lighting and signage."

"Pave every mile of the trail."

"More of the trail should be paved. And the signs, which are now kind of unattractive, should feature a new design."

"Offer tourists a list or directory of every store in each community along the trail. These should be given free to every trail users who wants one."

"Sign up all new bike purchasers for a trail database and then send them a lot of free maps, brochures and coupons."

"Move the Erie Trail closer to our bar!"

"Add more recreational activities and clubs to lure more people and make them feel safe using the trail."

"Close the gaps in the canal trail. They say that the return on investment would be at least 10 fold. Add services for boaters. Add more amenities and local grocery stores."

"You need our agency and the State of New York to start an initiative to improve and make the trail more beautiful and safe."

"We need more signs along the Thruway announcing various sections and activities along the length of the canal trail."

"PTNY should come and meet with travel & tourism people here in Orleans County."

"More emphasis by state agencies to attract drivers on the Thruway to local businesses and events along the trail."

"If the town or village government has little incentive to boost local businesses, there isn't much anybody but the state can do about it."

"NYS needs to give more funding to upstate New York, including the trail and to various events along the trail."

"Advertise to more potential vacationers in neighboring states. Then add better signs and parking for local trail users. Both steps will boost the number of users."

"Set up local and regional advisory boards who members should meet two or three times every year. And take their advise seriously."

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APPENDIX F: VERBATIM COMMENTS OF TRAVEL AND TOURISM OFFICIALS: FALL 2012 SURVEY

Below are some of the verbatim comments of T&T officials whom Dr. Scipione interviewed by telephone:

"We mainly cover events and venues on the Niagara Frontier (Niagara Falls and Buffalo), but the Erie Canal Trail is a unique attraction that we would like to market more. Not so much for local people, many of whom already walk, bike or hike the trail, but more so for bicycle tourists and people who are interested in the history of the Erie Canal."

"A few years ago we put together a little brochure with photos and the history of the local locks along the canal and it was a big hit. We were only going to print a thousand but we had to triple the print run. Maybe we should run it again next summer."

"We learned all about the Erie Canal when I was growing up in Pittsford. And now I am partly responsible for showcasing the canal and canal trail. We would sure welcome more help from Albany."

"Our county legislature is considering doubling the size of a picnic area along the trail, which would include doubling the number of parking spaces, adding modern lighting and sanitary facilities, and putting up more signs directing people to the expanded park. We think that park would be great for us. But we are going to need money from the state government. Maybe Governor Cuomo will read your report. Sure hope so."

"If your survey report shows that users of the canalway trail are spending a lot of money in our towns, maybe that would convince local merchants to wake up and form a group to fund more promotion of the canal and trail. Because right now I am not sure they take them seriously."

"The summer bicycle tour from Buffalo to Albany seems to be growing bigger every year. That's good. But what about the day-to-day trail use during the rest of the year? Your numbers and statistics will be very important to us."

"We need a real partnership between the counties and cities and Albany. The trail is a little gem that could really bring a lot more people to New York State. But you have to make the investment to do it."

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