



Economic Impact Analysis of Orange County Trails



The East Central Florida Regional Planning Council produced this report as the result of economic and behavioral analysis conducted for the Florida Department of Environmental Protection's Office of Greenways and Trails. The Economic Impact Analysis of Orange County Trails was made possible by the funding contributions of the Office of Greenways and Trails, the Florida Greenways and Trails Foundation, the U.S. Forest Service, Orange County and the City of Winter Garden. The surveys and analysis took place in 2010 - 2011 and are reflective of the current economic situation. For more information concerning the study and analysis, contact:

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Executive Summary

This project was undertaken to determine the economic impact of the Little Econ Greenway, West Orange and Cady Way Trails on Orange County's local economy and specifically, on the economy of Downtown Winter Garden.

A general trail survey pertaining to the user's typical trail visit in Orange County was made available online from October 5, 2010 to January, 2011, via *Survey Monkey*. The survey was distributed to the East Central Florida Greenways and Trails Users Group which is composed of trail planners, users and advocates, Metroplan Orlando, Orange County, the City of Orlando and the City of Winter Garden for disbursement and placement on websites. Bike shops, running and biking groups and other advocacy groups, such as Bike Walk Central Florida and trail-related businesses, were contacted and asked to distribute the survey to their contacts or groups and to place the link on their websites, if possible. The University of Florida, Rollins College, Aloma Elementary, Tildenville Elementary, Audubon Elementary, Union Park Middle School and University High School were contacted to distribute the survey link to teachers and students/parents. A hard copy of the survey was emailed to the principal at each of the following schools: Aloma Elementary, Tildenville Elementary, Audubon Elementary, Union Park Middle School and University High School. In addition, 400 copies were sent to the eighth grade classes of Union Park Middle School.

In order to determine the economic impact of the three studied trails on Orange County's economy and Downtown Winter Garden, the East Central Florida Regional Planning Council (ECFRPC) utilized the Regional Economic Model, Inc. (REMI) The ECFRPC is the only organization in the region with a license for the REMI Policy Insight Model. The REMI tool is a customized econometric model for the East Central Florida Region. In this analysis, the model was used to specifically look at business activities and consumer spending.

Surveys were conducted to collect data on the spending habits associated with using the Little Econ Greenway, the West Orange and Cady Way Trails. Data collected was analyzed and split into different categories reflecting specific consumer spending and business sales. See survey question 13 for the specific information regarding consumer spending habits. Based on the survey results, the average spending per trail user is \$20 per visit, representing food and beverages, transportation, books and maps, bike maintenance, rentals and more. According to Orange County, 1.7 million people use the trails each year for recreation, health and fitness or transportation, which would represent a total estimated expenditure by trail users of \$32.556 million.

REMI Policy Insight, a customized econometric model for the East Central Florida Region, was used to analyze the economic impact of these Trails in Orange County. The results of that analysis are shown below.

Table 1: Overall Economic Impacts of Orange County Trails in 2010

Category	Units	2010
Total Employment	Jobs	516
Output or Sales	Millions of Dollars	\$42.6
Personal Income	Millions of Dollars	\$10

In 2010, the Little Econ Greenway, West Orange and Cady Way Trails in Orange County supported 516 jobs and had an estimated positive economic impact of \$42.6 million.

A second economic impact analysis was conducted to analyze the economic impact of business activities in Downtown Winter Garden and consumer spending related to trail usage on the West Orange Trail in Orange County. Data collected was analyzed and split into categories reflecting specific consumer spending and business sales.

Based on 31 Downtown Winter Garden businesses surveyed, the average sales revenues were \$470,000, bringing total business sales to \$14.6 million. A similar study, the Great Allegheny Passage Economic Impact Study, concluded 25.5% of gross revenue was directly attributed to trail users. We use this conservative number to conclude from the surveys that 25% of the sales came from trail users, for a total amount of \$3.6 million.

The REMI Policy Insight model was used again to analyze the economic impact. The results for the Trails’ positive economic impacts to businesses are below.

Table 2: Trail Related Impacts to Winter Garden Downtown Businesses in 2010

Category	Units	2010
Total Employment	Jobs	61
Output or Sales	Millions of Dollars	\$5
Personal Income	Millions of Dollars	\$1

In 2010, the West Orange Trail supported 61 jobs, and represented a direct and indirect estimated economic impact of \$5 million for Downtown Winter Garden.



I. Background

In 2008, Florida received American Trails' inaugural award of "BEST TRAILS STATE IN AMERICA," recognizing the State of Florida and its many partners for their vision and coordinated efforts to develop a statewide trail network. Counties, cities and regions continue to work together to plan new trails and trail usage by local residents, as well as visitors, is growing. Florida's national award and Visit Florida's marketing of trails through its new website (www.visitflorida.com/trails) are helping advance trail tourism.

Tourists and local residents are demanding more ecotourism opportunities. As one of the most visited destinations in the world, with 50 million visitors/year, Orlando and East Central Florida have a prime opportunity to promote trails, greenways and blue-ways as ecotourism destinations.

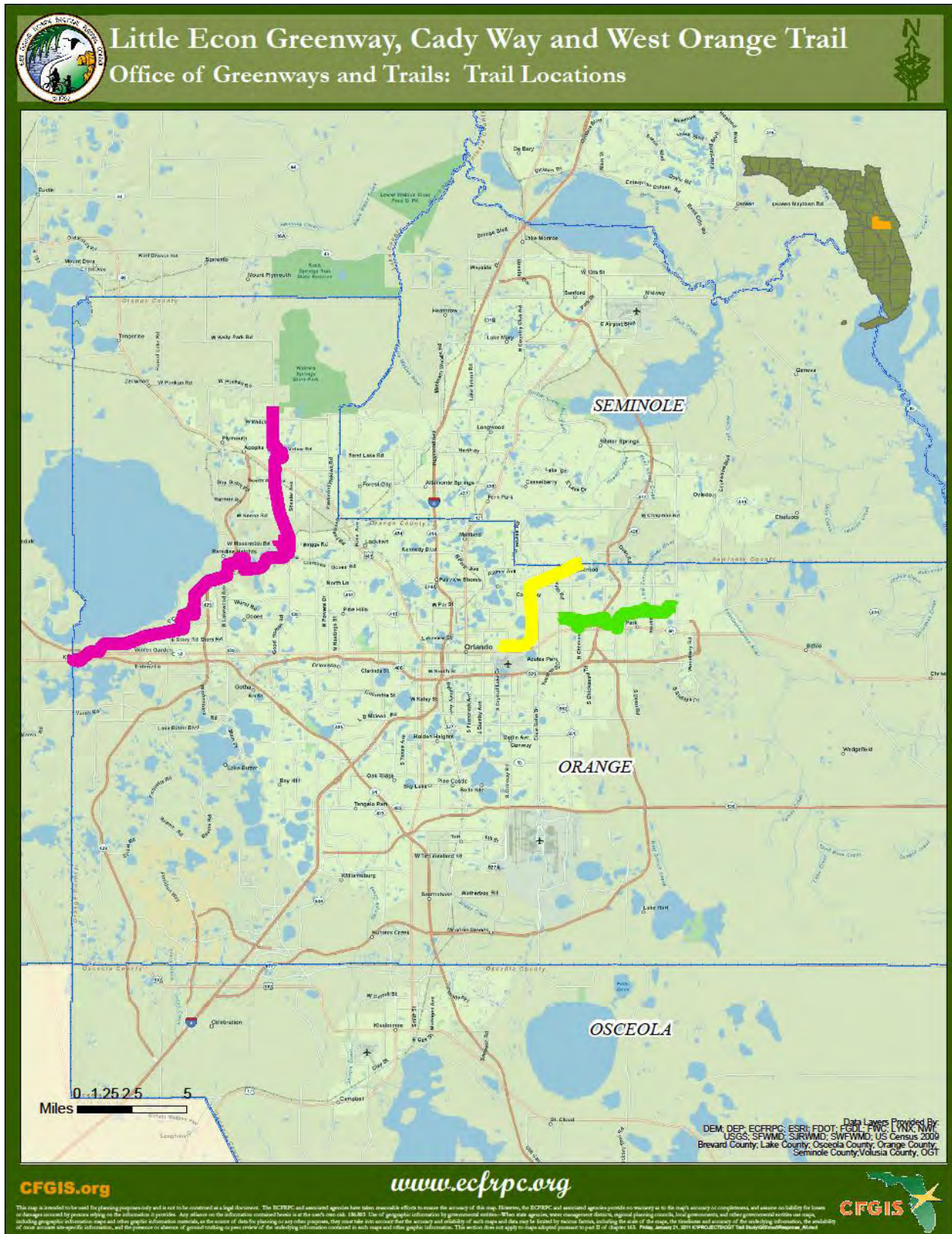
At a time when both personal and government budgets are considerably reduced, trail planners and agencies realize the importance of low cost, healthy outdoor recreation amenities for individuals and families and the positive economic impact of trails. With about 1000 miles of trails on the ground (equestrian, bike, mixed use and motorized) through the East Central Florida Region, trails can have a large economic impact.

The purpose of this study was to determine the nature of some of these impacts. The East Central Florida Regional Planning Council (ECFRPC) worked with the Florida Department of Environmental Protection's (FDEP) Office of Greenways and Trails (OGT), the City of Winter Garden and Orange County to analyze the economic impact of the Orange County trail system on their local economies. Figure 1 illustrates the three trails studied for this report: the Little Econ Greenway, the Cady Way Trail and the West Orange Trail.

Orange County, Florida located in Central Florida, has over one million residents. Orlando receives over 50 million visitors a year. Trails may become destinations for these and many more visitors.

The ECFRPC uses the REMI Policy Insight™ model to assist local governments with economic development, planning and economic impact analyses. The REMI model is a dynamic forecasting and policy analysis tool that answers "what if...?" scenario questions about local economies. The ECFRPC is the only agency in the region with a REMI license.

Figure 1: Location of Little Econ Greenway, Cady Way and West Orange Trails in Orange County, Florida



II. Trail Background



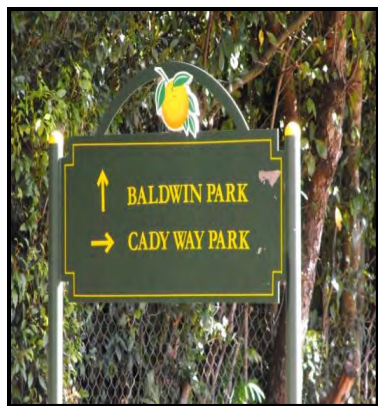
Cady Way Trail

The Cady Way Trail, located in Urban Orange County and the City of Orlando, opened its first phase in 1994 and is now 6.5 miles in length. The Trail follows an old railway corridor, alternating between single-width and two paths. A median separates pedestrians from skaters and bicyclists.



A Federal Highway Administration Transportation Enhancement and Florida Department of Transportation grant helped fund the Cady Way Trail. In addition, the Florida Department of Environmental Protection, Office of Greenways and Trails, awarded a \$483,000 grant for the Trail. The building and maintenance of the Trail is made possible by the partnership of the City of Orlando, the Orlando Utilities Commission, the City of Winter Park and Orange County.

Cady Way Trail links Orange County, Orlando neighborhoods and the Fashion Square Mall in Orlando to Winter Park. It also connects to the City of Oviedo by linking the Cross Seminole Trail in Seminole County via the new 685-foot Cady Way Bridge over State Road (SR) 436.



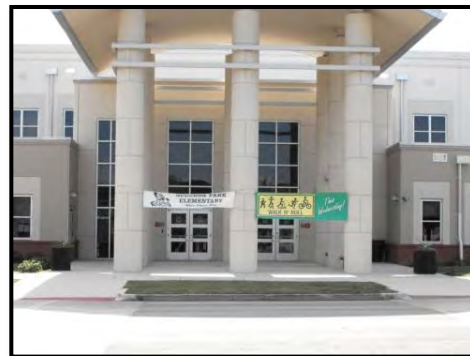
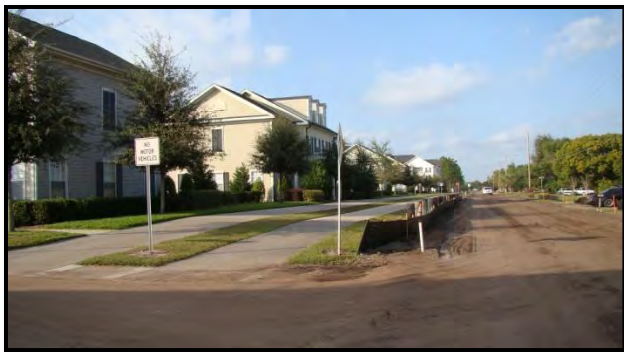
A trail connection allows for access to Baldwin Park, a neo-traditional, mixed-use, walkable neighborhood. This planned community was redeveloped from a former military base and includes schools as well as recreational and open space areas.

Approximately one mile separates the Cady Way Trail and the Little Econ Greenway. A future connection will create an important cross county, regional network. Ultimately, the 30-mile trail system will extend throughout East Orange County, into Orlando and on to Seminole County.

According to John H. Classe, Jr. of the New Broad Street Companies (2005), "to create a walkable community means connecting to and extending the existing trail system. Connecting to the Cady Way Trail and ultimately the Little Econ Trail will extend a 2.5-mile loop around Lake Baldwin to a 25+ mile ride and create an opportunity for trail users to explore and enjoy the Baldwin Park community."

The Winter Park Pines Golf Club and Community, Ward Memorial Park and the Cady Way Pool and Park are located directly on the paved Trail. Aloma Elementary, Brookshire Elementary and Audubon Elementary are located on or are accessible from the Trail. Once the Trail is extended to cross SR 50 heading south, the Trail will pass the Orlando Skate Park and Festival Park providing even more access to outdoor recreational opportunities.

The Cady Way Trail corridor includes almost every type of land use including residential, commercial, public, institutional and industrial. This makes the Cady Way more than just a recreation, health and fitness trail. It is a transportation corridor and economic development driver. Major shopping and eating establishments, including The Fashion Square Mall, can be found at or near the western end of the Trail, along with Anthem College and Corporate Park Office Building. Opposite University Boulevard from Cady Way Trail is Full Sail University, a private media school with over 11,000 students. For these reasons, as well as its connection to Seminole County and close proximity to the Little Econ Greenway, the Cady Way Trail sees almost a half million visitors per year.



Little Econ Greenway



The Little Econ Greenway is a rural, 7.4-mile paved trail that extends from Alafaya Trail (University of Central Florida) to Forsyth Road, following the Little Econ River. Completion of the Trail should occur when the final one-mile gap between the Greenway and the Cady Way Trail is closed, establishing a major connection to the Orange County Trail System and creating a loop for recreation and transportation. Funding for the Trail was provided by the Florida Preservation 2000 Rails-to-Trails Program, Orange County and the Federal Transportation Enhancement Program.

This 7.4-mile paved multi-use Trail takes visitors away from urban Orlando into natural Florida as the Trail runs along the greenway of the Econlockhatchee River, which is teeming with Florida wildlife. Recreational areas for fishing, canoeing/kayaking, nature watching and picnicking are available along the Trail. Blanchard Park, located off Dean Road, is considered the Trail's premier trailhead and is home to the YMCA, which offers facilities for tennis, a pool, a children's area and more. Blanchard Park also has two playgrounds, soccer fields and numerous other facilities for the public to enjoy.

Multi-family and single family homes are located along Blanchard Park, the Trail and the Greenway. Schools, community centers and churches can be found along, and connected by, the Trail. University High School and Union Park Middle School are situated along the trail, as well as Arcadia Acres Park, Econ Soccer Complex, basketball courts and a butterfly garden.

Although an urban environment surrounds the Trail, there are no businesses directly on the Trail other than the YMCA. Businesses are generally located on SR 50, south of the Trail, and University Boulevard, north of the Trail. Therefore, trail users need to exit the Trail to access surrounding business. However, being a rural, environmentally sensitive trail, this is to be expected and preserves the serene atmosphere of the Greenway. Orange County estimates approximately 30,000 - 55,000 people visit trails each month for recreation, fitness and nature viewing, as well as travel to and from school and work.





West Orange Trail

The West Orange Trail is currently a 22-mile, multi-use suburban trail located in Western Orange County running from the Lake/Orange County line (Killarney Station) to Welch Road in Apopka and passing through Oakland, Downtown Winter Garden, portions of Ocoee, Orange County and on into Apopka. Phase I began in 1994 from the county line (Lake/Orange Counties) to Park Avenue in Winter Garden. Phase II began in 1999 from Park Avenue to U.S. 441 in Apopka. The proposed expansion of the Trail for the Lulu Creek extension has approximately \$500,000 budgeted in the five-year Transportation Improvement Plan. When complete, the Trail will continue north from Apopka to Kelly Park and link to Lake County creating a 36-mile multi-purpose trail. If the West Orange Trail ultimately connects to the Seminole Wekiva Trail, the trail system will run from The South Lake Trail in Lake County, through Orange County, into and through Seminole County and back into Orange County via the Cady Way Trail.

Partnerships with the Florida Department of Environmental Protection, Florida Department of Transportation, Trust for Public Land, the Cities of Oakland, Winter Garden, Ocoee, Apopka and Orange County were, and continue to be, vital in the development of the West Orange Trail. Funding for the Trail was provided by Orange County, Florida Preservation 2000 Rails-to-Trails Program, Federal Transportation Enhancement Program and the Land and Water Conservation Fund. The Orange County Parks and Recreation Division is responsible for the operation and maintenance of the West Orange Trail.



Walkers, runners, bikers and skaters are not the only users of the Trail. The Clarcona Horse Park is located along the Trail, offering equestrians a five-foot-wide, ten-mile-long path that runs parallel to the West Orange Trail.

Eleven trailheads are located along the West Orange Trail, exclusive of the Clarcona Horse Park. A number of special interest sites are found along the Trail including a restored railroad bridge, the Oakland Nature Preserve and the Tildenville Outpost, home to an historic railroad exhibit. Killarney Station, Winter Garden Station and Chapin Station are major trailheads and offer facilities including bicycle rentals, air stations, restrooms, playgrounds and other facilities. Downtown Winter Garden is one of the major destinations for West Orange Trail visitors. The Trail travels through the center of Downtown, offering visitors a chance to frequent restaurants, ice cream shops, outdoor outfitters, bike shops and more. Before the Trail was developed, only two restaurants were open in Downtown and retail stores were going out of business, creating a blighted area with many vacancies. The West Orange Trail has been a key element in a three part strategy-Streetscape, Trail and the Theatre - responsible for the redevelopment of Downtown Winter Garden - .





The City of Winter Garden saw the West Orange Trail as an opportunity to create a destination for visitors and residents. By embracing the Trail as the spark to ignite redevelopment, the City has redefined their Downtown by investing in the area and downtown businesses. Five million dollars was spent by the City to extend the Trail through their Downtown and enhance infrastructure and streetscape to create a one of a kind destination. Improvements included brick streets, the clock tower and other enhancements. The dedication of the City to the quality of the Downtown is evident through the high standards of maintenance throughout, including City facilities. With 90%+ downtown occupancy rate, the City's strategy to attract business development within its downtown area has succeeded.

PLANT STREET TODAY



To leverage the maximum opportunity to revitalize this area, the City of Winter Garden created a Community Redevelopment area in 1992 (two years prior to the construction of Phase I of the West Orange Trail to Park Avenue), an Historic Downtown District, an Architectural Overlay and Activity Centers in the Downtown.

While extending the Trail through the center of Downtown raised concerns about disruptions to the area, the Trail proved to be a catalyst for Downtown redevelopment. Businesses adjacent to the Trail provide convenient access, marketing and exposure to the over 50,000 trail visitors per month. The City created a place with unique character and charm which invites customers to return based upon their trail experience and the visibility of the businesses. According to Winter Garden’s City Manager, Mike Bollhoefer, the Trail is a great attractor for the “creative class” and recreation-based businesses, which are two of the City’s targeted industries.

One trail visitor stated, “The real economic impact comes from people who visit on their bikes, see what Winter Garden has to offer in terms of restaurants and stores, and then they come back.”

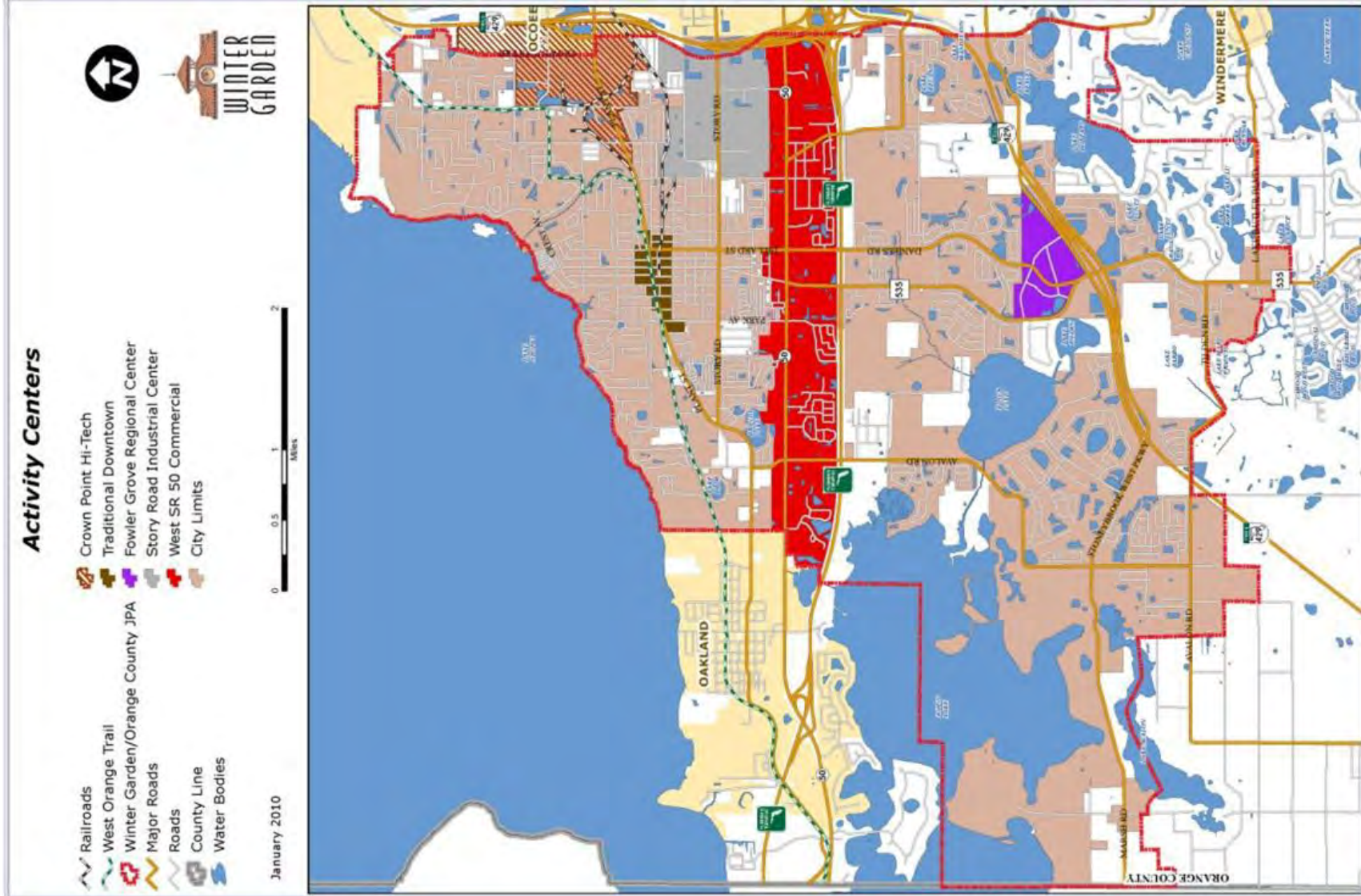
Trail users are frequent customers of the Downtown restaurants. The Trail not only impacts the Downtown area, but has also been a contributing factor in the improvement of the City’s housing market, which has seen far more higher-end homes constructed in the years since the Trail’s development.

The Trail and the redevelopment of the Downtown area has allowed the City to fund and promote a variety of events which draw in crowds from around the region, state and country. Some of the events that take place in Downtown Winter Garden and on the West Orange Trail include:

- Farmers Market
- Fridays on the Plaza (Downtown Merchants Guild)
- Cruz-n-Car, Classic Car Show
- Uncle Don’s Chili Cook-Off
- Spring Fever in the Garden
- Music Fest (Winter Garden Heritage Foundation)
- Halloween Fest (Downtown Merchants Guild)
- Art Festival
- Light-Up Winter Garden
- Christmas Parade
- Tree Lighting on the Trail

“(The Trail) has helped put us (The City of Winter Garden) on the map and makes us one of the most desirable communities in Central Florida. Quality of life is one of our essential selling points and the Trail is an integral component of our quality of life.”– Mike Bollhoefer, Winter Garden City Manager

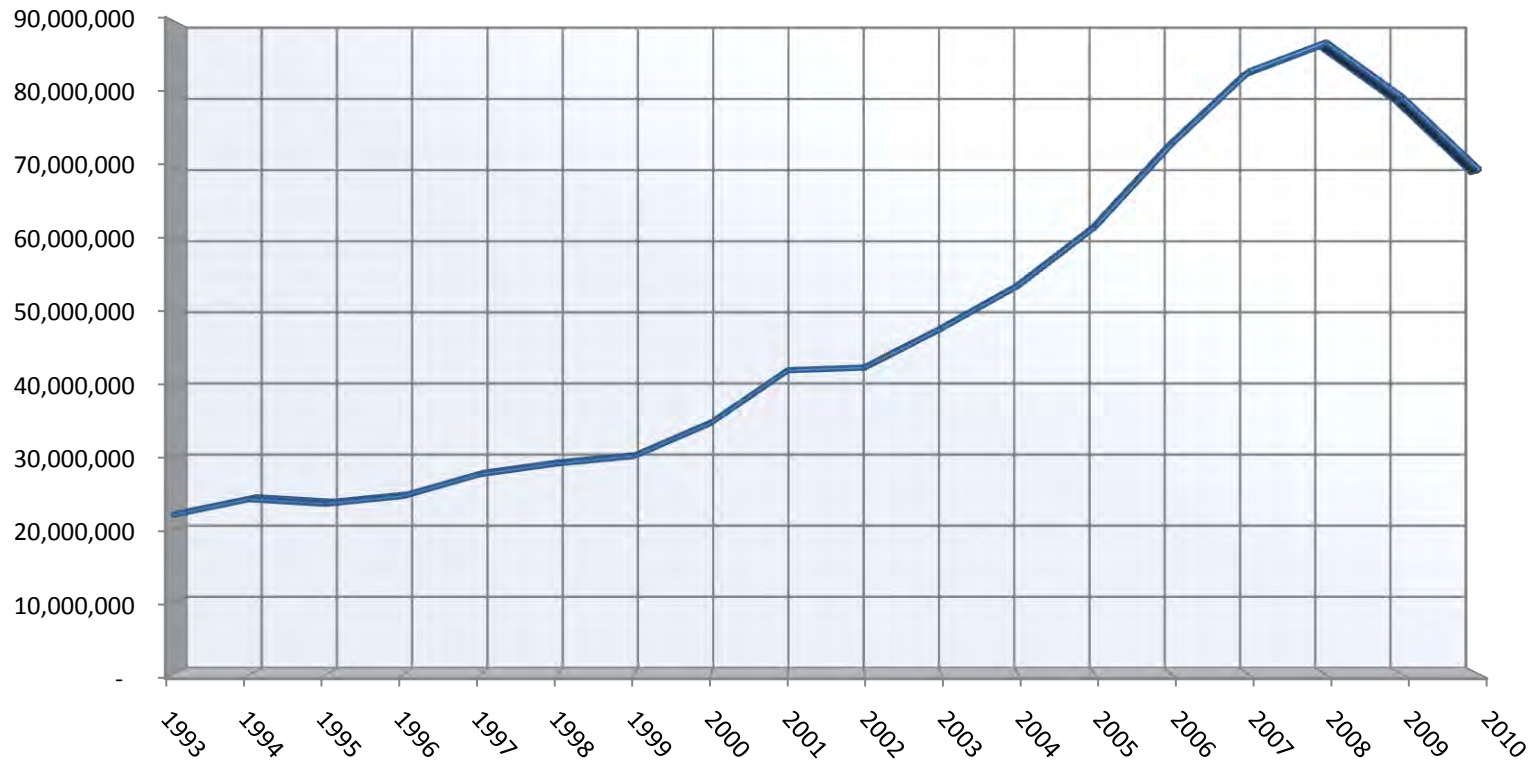
Figure 2: Activity Centers for Historic Downtown District Area, Established 2010



The City of Winter Garden compared property values from 1992, when the Community Redevelopment Area (CRA) was established, to 2010. The total 2010 CRA value was estimated at \$69.39 million versus \$22 million in 1993, a cumulative increase of 215% from base year, with an average annual increase of 11.32% for 19 years. While the Trail improvements were completed in 2002/2003, 2001 to 2008 marked the highest and fastest growth of the assessed value in the downtown area. Even with the CRA value reduced by 12.6%, due to the overall economic conditions of 2009 and 2010, the CRA area lost less value than the overall city reduction of 15%.

Figure 3: CRA / Assessed Property Value Trends

City of Winter Garden CRA / Assessed Valuation (in Dollars)



Investment in Downtown Winter Garden continues in the form of a plan for a family entertainment area for the City, with a City Pavilion and an interactive fountain. Additional planned development includes:

- Diversifying of land uses to include more office and residential areas.
- Increasing a variety of retail resources.
- Increasing vertical development through second and third floor spaces.

Efforts continue towards promoting Downtown Winter Garden and the West Orange Trail as a destination, including directional and wayfinding signs to and within the Downtown, as well as the creation of public and private partnerships.

The West Orange Trail, which passes directly through Oakland Park and winds along Lake Apopka, is prominently featured in the planning and promotion of development that occurs in the area. The Oakland Park developer, Castle and Cooke, not only provided the connection through the property but also to the development’s internal trail system.

The fact that the Trail provides a direct connection from Oakland Park to Downtown Winter Garden makes it “as important to Oakland Park as any Main Street” – John Rinehart, Vice President, Castle and Cooke. Oakland Park is the first community in Central Florida to be certified as a Green Development by the Florida Green Building Coalition.



The West Orange Trail is a favorite among bike enthusiasts, with numerous long distance group and solo bike rides occurring most weekends and even on weekdays. According to counts, September has the highest usage, followed by May and October. During Fiscal Year 2009/2010, counters estimated almost 889,000 visits to the West Orange Trail.



...the Trail is “as important to Oakland Park as any Main Street...A strong trail system connecting both internally and externally is a cornerstone of the Oakland Park Master Plan.” --John Rinehart, Vice President, Castle and Cooke, 2005.

III. Purpose of the Study

This project was undertaken to determine the economic impact the Little Econ Greenway, West Orange and Cady Way Trails have on Orange County's local economy and, specifically, on Downtown Winter Garden's economy.

This project also studies the behavioral analysis of Orange County trail users. Recommendations based on trail user survey information will aid Orange County in increasing trail-related development and trail usage.

- Analysis included Four User-Surveys
- West Orange Trail User Survey
 - Cady Way Trail User Survey
 - Little Econ Greenway User Survey
 - General Online Orange County Trail User Survey

IV. Methodology

A trail user survey and a business survey were created to obtain statistical information and economic data for analysis. The surveys were derived from a combination of previous business and user surveys from *West Orange Trail – Phase I – A Study of the Economic Impacts of Trail Users* and *Trail Town Economic Impact Study* by The Progress Fund and Laurel Highlands Visitors Bureau.



Although the surveys conducted on each trail contained identical questions, the surveys were trail specific. The online survey contained identical questions to each field survey but focused on a typical visit to the Orange County Trail System. This survey process will allow various analyses of each individual trail, typical trail user characteristics and countywide responses.

The Downtown Winter Garden Survey directly focused on the impact of the West Orange Trail on Downtown Winter Garden businesses. Copies of the business surveys can be found in the Appendix.

The business and user surveys were reviewed by the East Central Florida Greenways and Trails Regional Working Group, Orange County, City of Winter Garden, the Florida Greenways and Trails Foundation, Inc. and the FDEP Office of Greenways and Trails.

User surveys were used to determine trail user characteristics and spending habits. They were conducted on the Little Econ Greenway, West Orange and Cady Way Trails from October 2, 2010 to November 28, 2010. Surveys on the West Orange Trail were conducted at Killarney Station, Chapin Station, Winter Garden Station, Apopka Station, McCormick Outpost and the Apopka-

Vineland Outpost, as well as in Downtown Winter Garden. Surveys were taken along the Cady Way Trail, as well as at Cady Way Park, the Fashion Square Mall Trailhead and in Baldwin Park. Little Econ Greenway surveys were conducted along the Trail and at Blanchard Park.

34 agencies, businesses, schools and community and advocacy groups were contacted for distribution of the online survey.

A general trail survey pertaining to the user's typical trail visit in Orange County was made available online from October 5, 2010 to January, 2011, via *Survey Monkey*. The link to the online survey was distributed to the East Central Florida Greenways and Trails Users Group which is composed of trail planners, users and advocates, Metroplan Orlando, Orange County, the City of Orlando and the City of Winter Garden for disbursement and placement on websites. Bike shops, running and biking groups and other advocacy groups such as Bike Walk Central Florida and trail-related businesses were contacted with information about the study and were asked to distribute the survey to their contacts or groups and place the link on their websites, if possible. The University of Florida, Rollins College, Aloma Elementary, Tildenville Elementary, Audubon Elementary, Union Park Middle School and University High School were contacted to distribute the survey link to teachers and students/parents. A hard copy of the survey was emailed to the principal at each of the following schools: Aloma Elementary, Tildenville Elementary, Audubon Elementary, Union Park Middle School and University High School. In addition, 400 copies were sent to Union Park Middle School for the eighth grade classes to complete.

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V. Survey Results

The detailed responses to each question for the online survey and the face-to-face surveys can be found in the Appendix. Based upon the survey responses, some key findings were determined in both economics and trail user information.

a. Economic Findings

Surveys were conducted to collect data on the spending habits associated with using the Little Econ Greenway, the West Orange and Cady Way Trails. Data collected was analyzed and split into different categories reflecting specific consumer spending and business sales. See survey question 13 for the specific information regarding consumer spending habits. Based on the survey results, the average spending per trail user is \$20 per visit, representing food and beverages, transportation, books and maps, bike maintenance, rentals and more. According to Orange County, 1.7 million people use the trails each year for recreation, health and fitness or transportation, which would represent a total estimated expenditure by trail users of \$32.556 million.

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Table 2: Trail Related Impacts to Winter Garden Downtown Businesses in 2010

Category	Units	2010
Total Employment	Jobs	61
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In 2010, the West Orange Trail supported 61 jobs, and represented a direct and indirect estimated economic impact of \$5 million for Downtown Winter Garden.

Definitions (from REMI):

Total Employment – Employment comprises estimates of the number of jobs, full-time plus part-time, by place of work. Full-time and part-time jobs are counted at equal weight. Employees, sole proprietors and active partners are included, but unpaid family workers and volunteers are not included.

Output or Sales – The sum of output for private non-farm industries, state and local government, federal civilian, federal military and farm sectors.

Personal Income – Income received by persons from all sources. It includes income received from participation in production, as well as from government and business transfer payments.

b. Behavioral Findings

Survey Responses for Trail Usage

- Bike several times per week on the Trail
- 5 times per week on average
- 2 times a day to walk my dog
- Daily commute
- Every day

- 57% of those surveyed learned about the Trail from family and friends or because they live by the Trail. Trail visitors from outside the region typically learned about Orange County Trails through word-of-mouth or trail/biking related organizations.
- Over 68% of respondents use the Orange County Trail system more than 10 times per year. This accounts for those who use the trail every day of the week or every weekend. This indicates trails are a major amenity and necessity for the community.
- Users will visit the trails in any season, with a slight decline during the summer, and any day of the week, in order to be physically active for health reasons or for outdoor recreational opportunities.
- Bicycle was the primary mode of transportation to the Cady Way Trail.
- Analysis of the three trails showed that the type of trail and surrounding land uses and transportation options truly play a role on where and how visitors access the Trail. West Orange Trail results showed that the majority of visitors access the trail at a number of trailheads or from Downtown Winter Garden. Visitors also access the West Orange Trail from Minneola and Clermont in Lake County and travel into Orange County. Responses for the Cady Way Trail, with fewer trailheads and a more urban setting, noted only a few access points--primarily Cady Way Park and the Mall Trailhead. For the Little Econ Trail, the Blanchard Park main trailhead was the primary access point, with some access from roadway crossings or “residences.”
- Limited use of transit-based travel to/from trails suggests room for improvement. Only 2.5% of the West Orange Trail users surveyed indicated use of transit to get to the Trail. The Cady Way Trail, with the most urban setting and transportation options in Orange County and Orlando, showed 0 responses for use of transit to reach the Trail.

“Along the Cady Way Trail ... transit to trailheads or stops at critical trail crossings are not available. More effort should be done to link trails and transit.” – Cady Way Trail Survey Response

One respondent for the Cady Way Trail noted that transit to trailheads or stops at critical trail crossings is not available and more effort should be made to link trails and transit.

- Personal vehicle was the most frequently used mode of transportation to the trails. 73% of those surveyed along the Little Econ noted using a personal vehicle to travel to the Trail, despite its proximity to residential housing. This may be due, in part, to the construction and dangerous pedestrian environment along SR 50.
- 40% of survey responses indicated an overnight trip taken in conjunction with their visit to the West Orange Trail, staying in accommodations such as a hotel. However, only “homes of friends/family” were indicated as responses for both the Cady Way and the Little Econ, as would be expected due to the lack of overnight facilities adjacent to these trails.
- While visitors want to maintain the overall serenity of trails such as the Little Econ, users would like to see some trail events, varying in nature and location.
- The majority of trail users indicated that they would be more likely to purchase goods or services from vendors located along the Trail if they had a coupon.



Figure 4: Residence of Trail Survey Responder by Zip Code

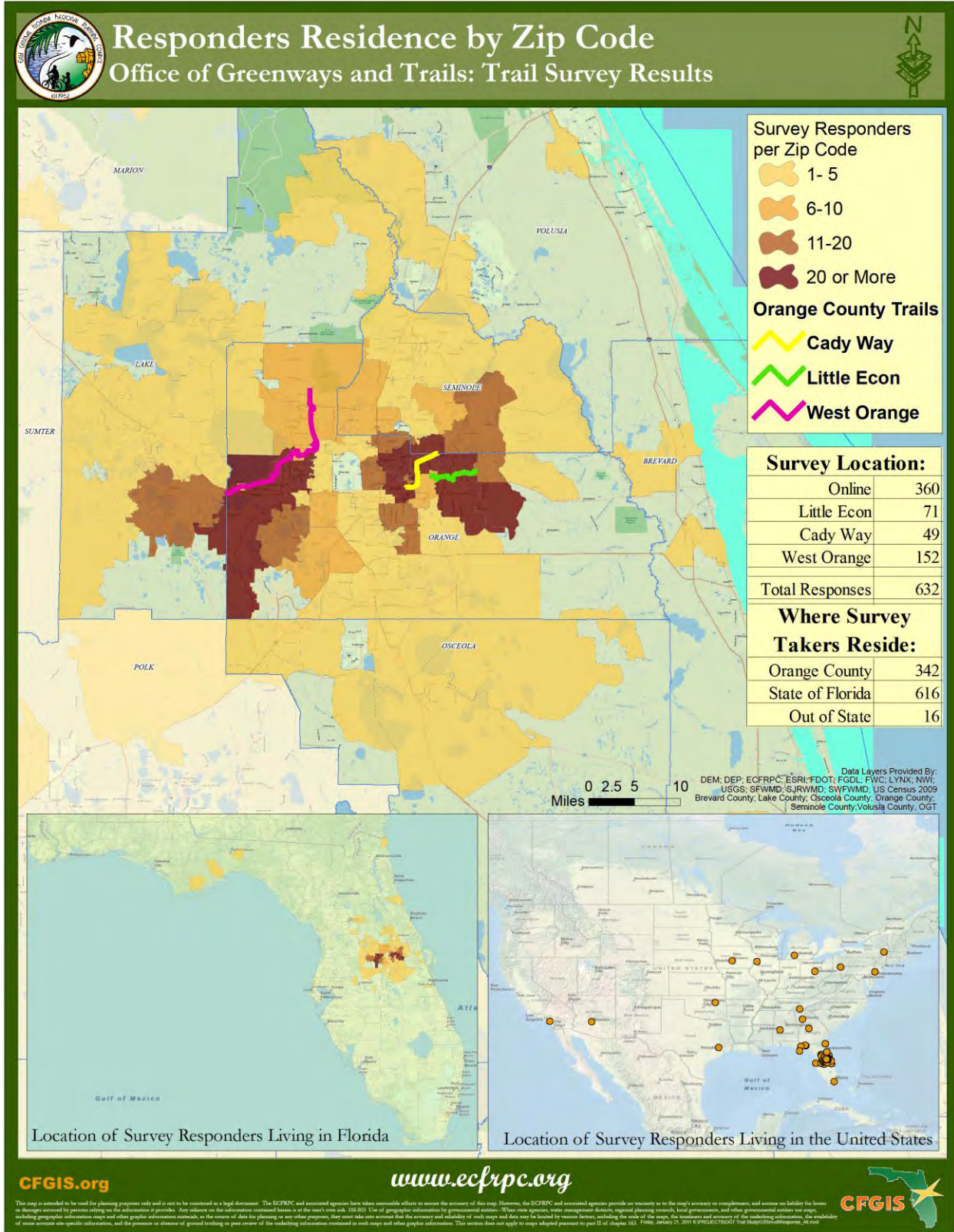
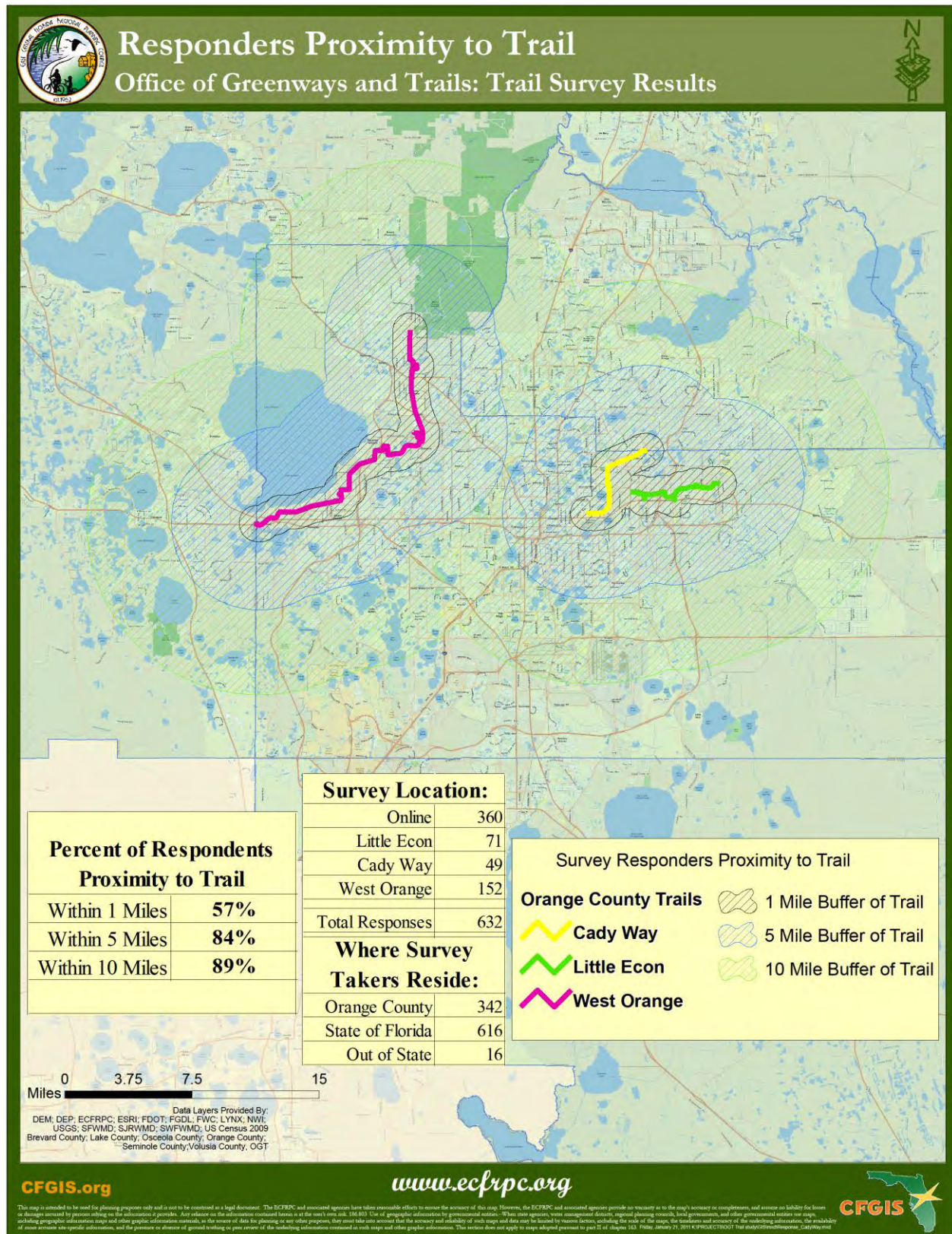


Figure 5: Responders Proximity to the Trail



VI. Recommendations

Finding the balance between appropriate trail associated economic development and redevelopment while maintaining the tranquility that trails provide can be a difficult task, especially when considering three distinctively different trails. Overall, marketing to attract visitors from outside Orange County--if only day trippers--can be a major driver in trail use. With the launch of the Trails Website on VisitFlorida.com, businesses have the opportunity to advertise to a specialty market. The same is said for Orange County, Orlando and Winter Garden. By creating a trail-oriented marketing plan, utilizing Visit Florida and developing partnerships with outfitters and lodging facilities, an ecotourism niche that incorporates trails can be expanded throughout Orange County.

While the West Orange Trail provides ample opportunities to access food and beverages, as well as other retailers, the Little Econ Greenway and the Cady Way Trail are very limited on these resources. Users of the Little Econ Greenway praise the “sanctuary” that the Greenway and Trail create and, while they do not wish for commercial/retail development to infringe on the natural setting of the Trail, access to a food/beverage vendor, perhaps mobile but located directly on the Trail, is highly desired.

The Cady Way Trail has limited resources that are directly accessible from the Trail. Crossing SR 436 or SR 50, or leaving the Trail to reach businesses located along roadways, does not allow for a pedestrian-friendly situation. Without wayfinding signage along the Trail, those who do not frequent the Trail or the area would be unaware of destinations adjacent to the Trail, such as how to access downtown Baldwin Park.

Detailed wayfinding information not only gives trail users the opportunity to navigate to areas adjacent to the Trail, increasing its potential for regular, daily use, but it also gives users the option to spend money at nearby establishments. Making trail users more aware of area businesses and how to access them, may, in turn, encourage these establishments to market their resources to trail users through advertisement, shipping options, bike parking and other amenities.

Through region-wide collaboration, the Orange County Trail system currently connects three counties, with the potential for future connections across the region. Creating a seamless, wayfinding strategy within this system to indicate distance to the next jurisdiction, trailhead, access to connecting streets, transit stations and other convenience resources would enhance the trail users’ experience. Most of all, connections between the various trails is of vital importance. The Survey’s most frequently noted comment concerning trail connectivity was the desire and need to connect the Little Econ Greenway and the Cady Way Trail. The current one-mile gap prevents some users from continuing further along the system as there are potentially dangerous conditions for traveling the section between the Trails.



The regional connection of trails across county lines and the incorporation of transit, including SunRail, can enhance the ecotourism opportunities in Orange County. Marketing should target bicyclists and other trail users to not only ride the Trail, but also encourage their use of accessible, overnight accommodations. Redevelopment, in conjunction with the Trail, offers the opportunity for certain areas to focus on trail-oriented businesses, while maintaining the integrity of the Trail and its environment. Land use analysis of existing and planned trail corridors should include connectivity issues, pedestrian mobility and safety and opportunities for mixed use redevelopment that incorporates facilities for trail users. It is evident from this survey that easy access to nearby establishments, and the appropriate accommodations they may provide, encourages trail users to spend money. Therefore, it is no surprise that more money was spent, on average, by visitors to the West Orange Trail, which offers more access points to businesses than the other two trails. Visibility of businesses near a trail plays a role in inspiring future patronage. One bicyclist noted that, even though money was not necessarily spent during a visit to the trail, the stores and restaurants that could be noticed while on a bike ride often inspire a return visit.



Providing safe pedestrian access to trails and trailheads from residential neighborhoods, the University of Central Florida and Full Sail University, public schools, parks and business centers would facilitate a greater use of the Cady Way Trail and Little Econ Greenway. The area surrounding these Trails is urban and densely populated with auto-oriented roadways and developments. Incorporating linkages to trails would offer accessible, alternative, multimodal transportation routes.

Recommendations were based upon the analysis of the economic impact of these Trails on Orange County, land uses surrounding the Trails and user surveys, as summarized below:

- Create safe pedestrian access to trails from key areas.
- Provide facilities and lodging for trail users, to foster ecotourism industry along trails.
- Prioritize trail-to-trail connections to enhance regional trail tourism.
- Improve wayfinding signage, addressing county-to-county aspects, as well as local connections and facilities.
- Incorporate transit opportunities into trail accessibility.
- Create marketing plan and strategies for attracting out-of-county, regional and statewide visitors.

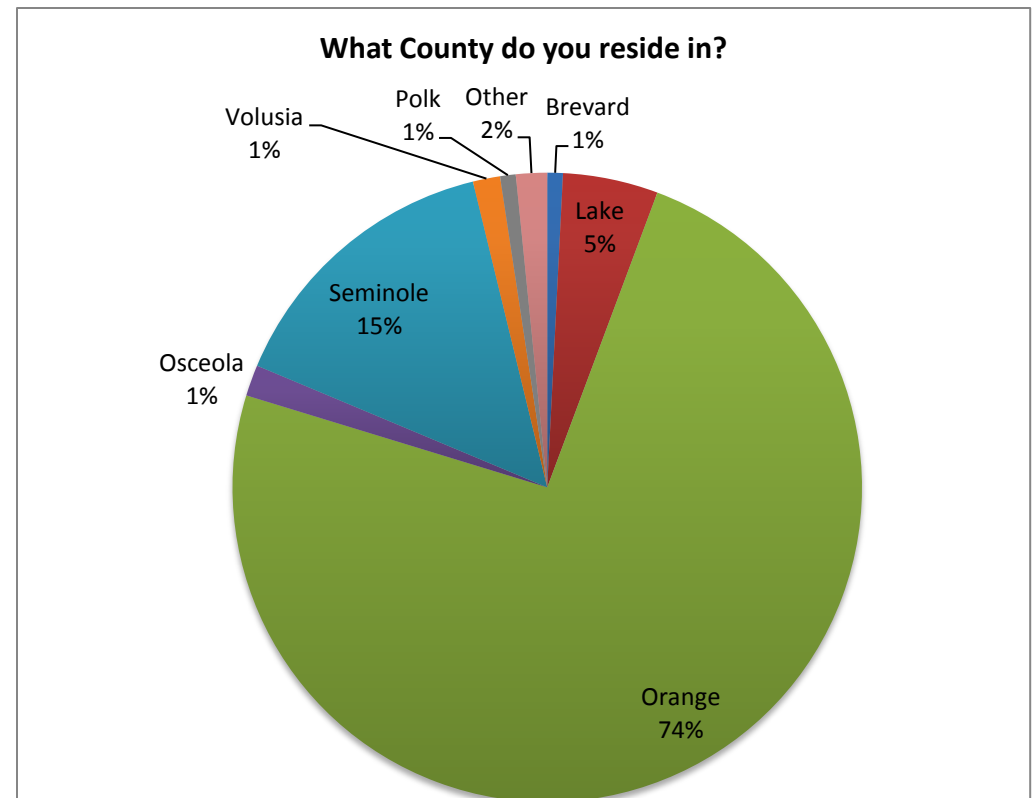
APPENDIX

Orange County Trail System Online Survey

The online survey was open for responses from October 2, 2010 through November 30, 2010. The following pages show the results of each question, including a brief analysis.

Question 1: What County do you reside in?		
Answer Options	Response Percent	Response Count
Brevard	0.8%	3
Lake	4.9%	18
Orange	74.1%	274
Osceola	1.6%	6
Seminole	14.9%	55
Volusia	1.4%	5
Polk	0.8%	3
Other	1.6%	6
<i>answered question</i>		370
<i>skipped question</i>		0

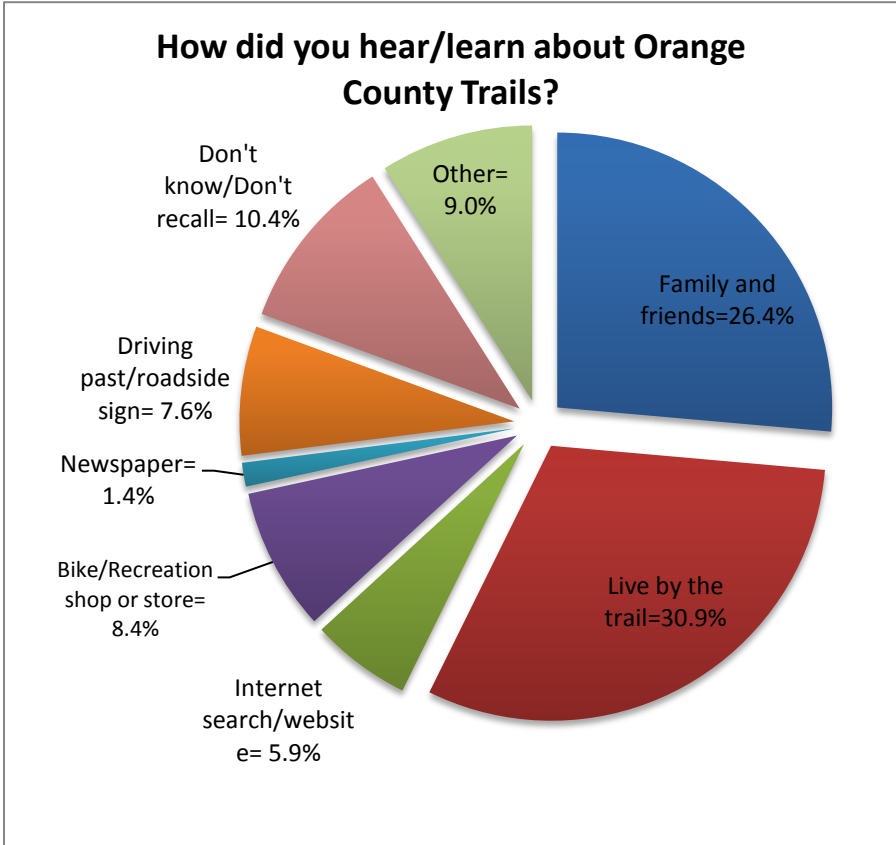
As a result of the online survey, Orange County had the highest number of respondents at 74%, followed by Seminole County (15%). Out of region responders represented 1.6% of the total and were from areas such as Leon County, Marion County, Wakulla County, Albany, NY and Kalamazoo, MI.



Question 2: Enter your zip code of your residence. Zip codes were analyzed to determine trail proximity to user residents. See maps on pages 19- 20.

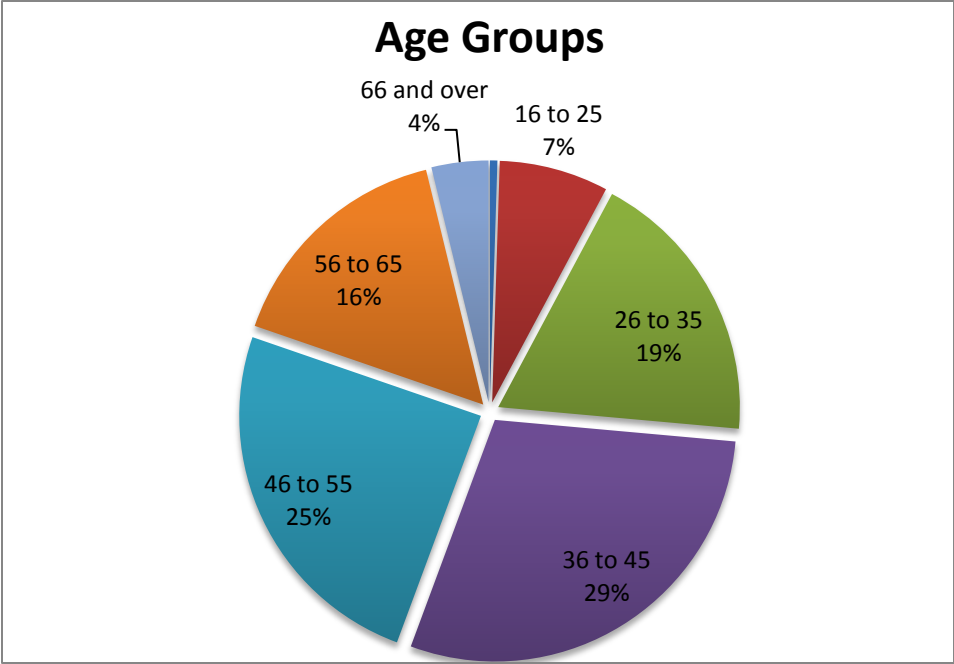
Question 3: How did you hear/learn about Orange County Trails (West Orange, Cady Way and Little Econ)?

Answer Options	Response Percent	Response Count
Family and friends	26.4%	94
Live by the trail	30.9%	110
Internet search/website	5.9%	21
Bike/Recreation shop or store	8.4%	30
Newspaper	1.4%	5
Driving past/roadside sign	7.6%	27
Magazine	0.0%	0
Don't know/Don't recall	10.4%	37
Other	9.0%	32
answered question		356
skipped question		14



Approximately 31% of respondents noted they learned about the Orange County Trail system because they live near a trail. 27% indicated they learned about the trails through family and friends. Other responses include employer or school, U.S. Postal Service, running or biking groups and being an actual part of the trail development process.

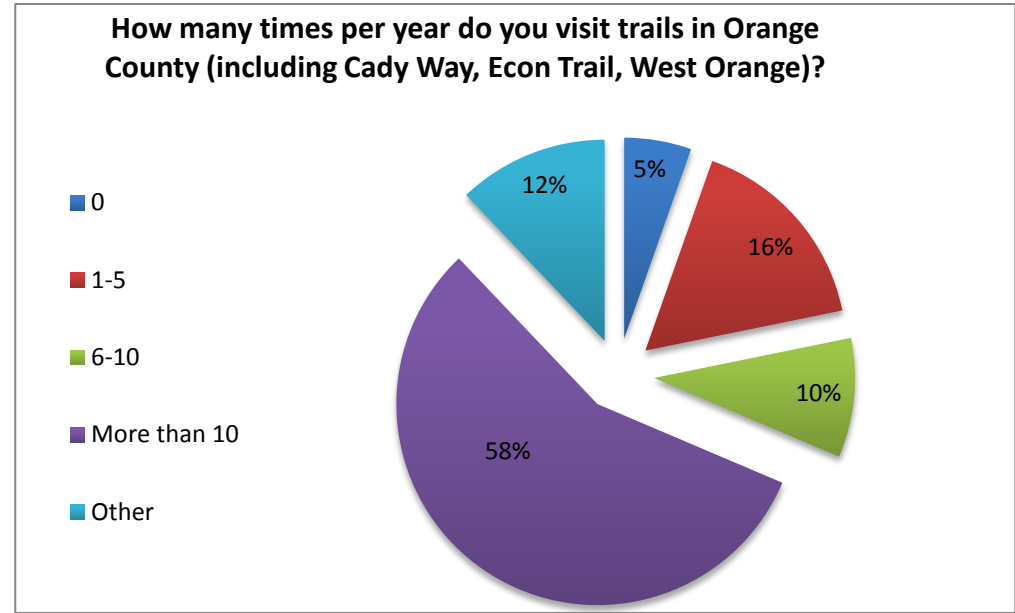
Question 4: Please check your age group.		
Answer Options	Response Percent	Response Count
15 years old and under	0.5%	2
16 to 25	7.3%	27
26 to 35	18.6%	69
36 to 45	29.2%	108
46 to 55	24.6%	91
56 to 65	15.9%	59
66 and over	3.8%	14
<i>answered question</i>		370
<i>skipped question</i>		0



The largest group of respondents were within the 36 to 45 age group (29%), followed by the 46 to 55 age group (25%). This is representative of an established demographic of those who are able to travel and create consumer spending along the trail system. This is not necessarily representative of families if only the adult(s) in the group took the survey, as responses are the views of the individual survey taker.

Question 5: How many times per year do you visit trails in Orange County (including Cady Way, Econ Trail, West Orange)?

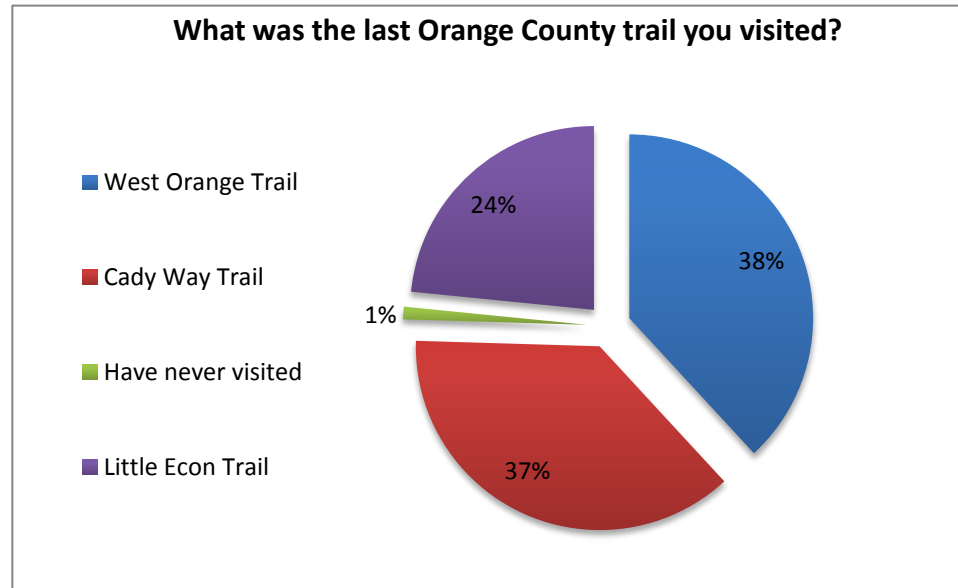
Answer Options	Response Percent	Response Count
0	5.4%	19
1-5	16.4%	58
6-10	9.6%	34
More than 10	56.5%	200
Other	12.1%	43
<i>answered question</i>		354
<i>skipped question</i>		16



Over 68% of respondents (243 of the 354) indicated they use the Trail more than 10 times per year. Many of those who specified "Other" specified that they use the Trail as follows: daily for commuting purposes; 3-5 times per week; every weekend; over 200 times per year. It can be assumed due to survey responses and comments made, that the 12% of those who responded "other" typically use the Trail about 5 times per week.

Question 6: What was the last Orange County trail you visited?

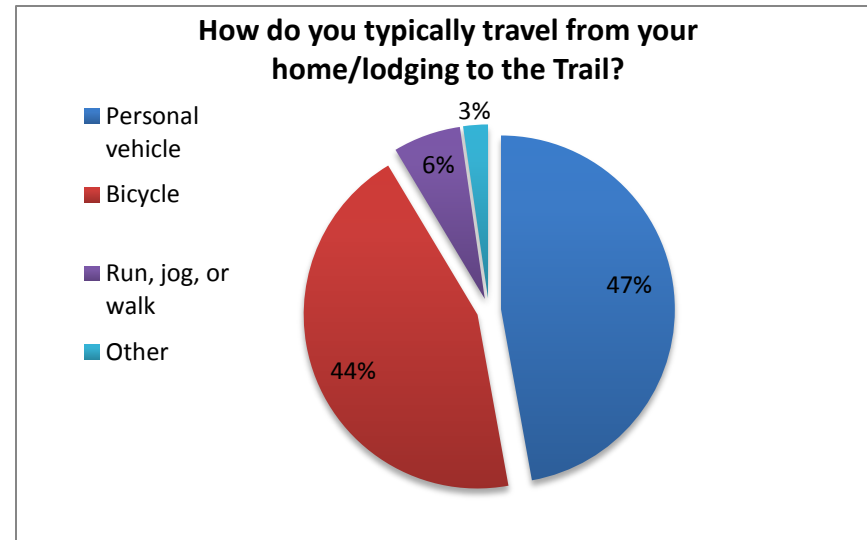
Answer Options	Response Percent	Response Count
West Orange Trail	38.1%	135
Cady Way Trail	37.3%	132
Have never visited	1.1%	4
Little Econ Trail	23.4%	83
Other	0.0%	0
<i>answered question</i>		354
<i>skipped question</i>		16



The Cady Way and the West Orange Trails received approximately the same number of responses as to which was the last Orange County trail visited, although they offer very different experiences in terms of trail type and facilities available along the Trails.

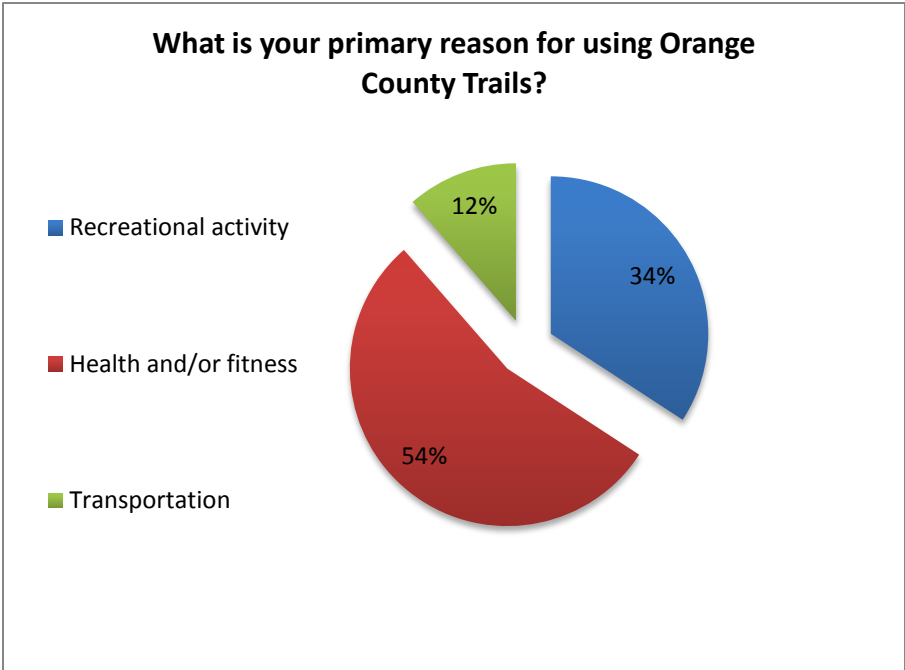
Question 7: How do you typically travel from your home/lodging to the Trail?

Answer Options	Response Percent	Response Count
Personal vehicle	47.2%	166
Bicycle	44.3%	156
Transit (LYNX, carpool)	0.0%	0
Run, jog or walk	6.3%	22
Other	2.3%	8
<i>answered question</i>		352
<i>skipped question</i>		18



Personal vehicle, as might be expected, was noted as the primary mode of transportation to the Trails (47%). However, an overwhelming 44% responded that the bicycle was their usual mode of transportation. This would indicate that the respective trails are within a comfortable biking distance from the respondent’s home or lodging and that appropriate biking conditions are seen to exist. These numbers indicate that, given appropriate land uses surrounding trails such as the presence of major residential and employment centers, and with greater connectivity between trails, trails could increasingly serve as transportation routes. It is of some concern that no respondents indicated using public transportation to access the Trail. Further investigation into transit routes and stops and improved efforts to link public transportation to trails is warranted.

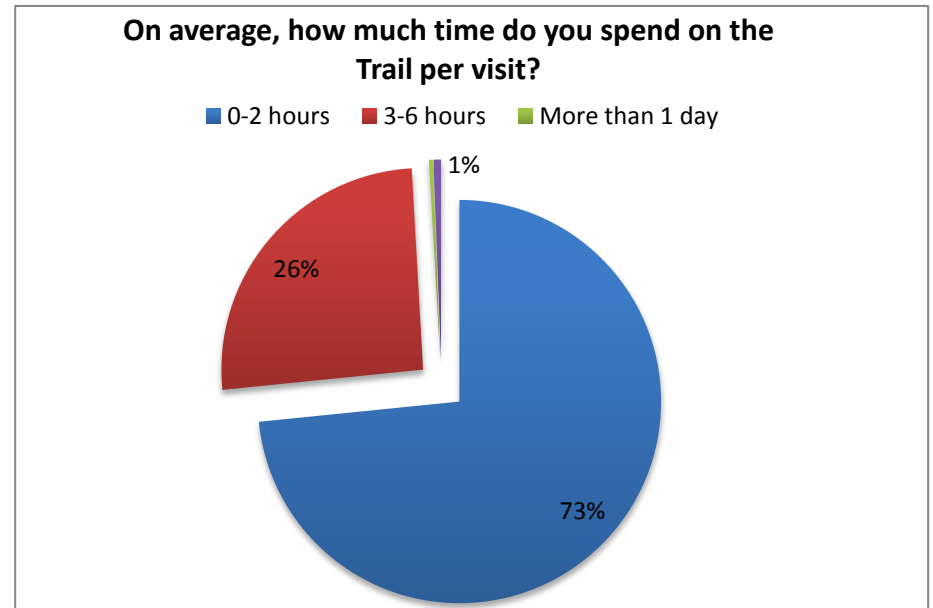
Question 8: What is your primary reason for using Orange County Trails?		
Answer Options	Response Percent	Response Count
Recreational activity	34.2%	120
Health and/or fitness	54.4%	191
Transportation	11.4%	40
<i>answered question</i>		351
<i>skipped question</i>		19



Health and/or fitness were the primary reason for using Orange County Trails for over 54% of respondents. Recreational activity was noted by 34%, while transportation was listed by 11.4%. An increase in employment opportunities adjacent to the Trail corridor and safe access to these job sites, plus the incorporation of public transportation options such as LYNX, may result in a greater use of the Trails for transportation purposes.

Question 9: On average, how much time do you spend on the Trail per visit?

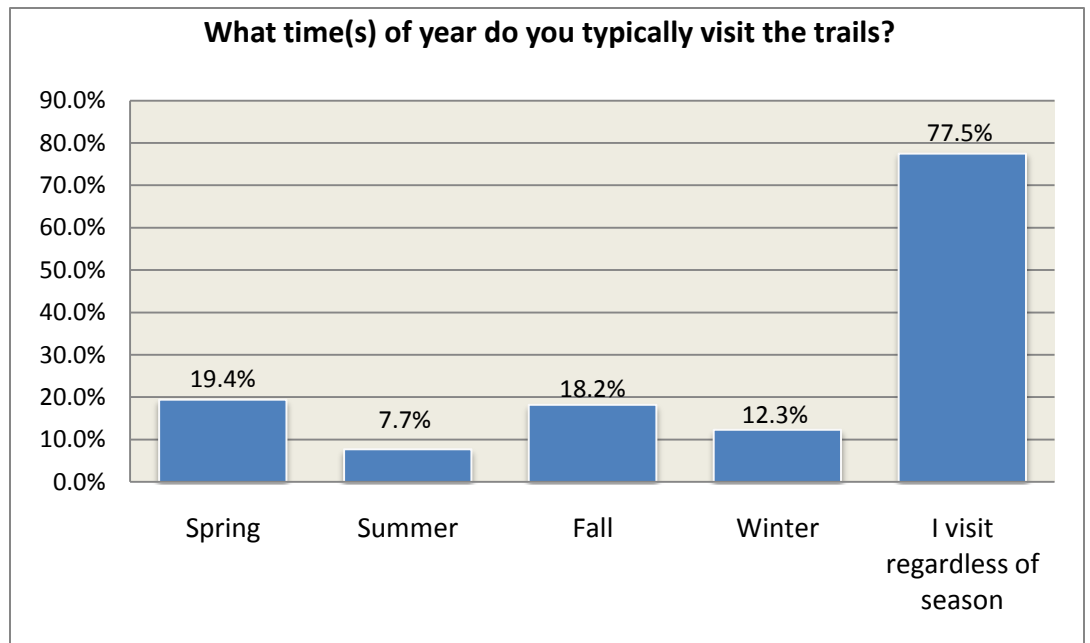
Answer Options	Response Percent	Response Count
0-2 hours	73.4%	260
3-6 hours	25.7%	91
More than 1 day	0.3%	1
Everyday	0.6%	2
<i>answered question</i>		354
<i>skipped question</i>		16



Three-quarters of respondents indicated that they spend, on average, approximately 0-2 hours on the Trail per visit, while 25% spend 3-6 hours. By linking the trails and creating ecotourism opportunities, the number of visitors—including local users—who spend one or more days on the trails could increase.

Question 10: What time(s) of year do you typically visit the trails?

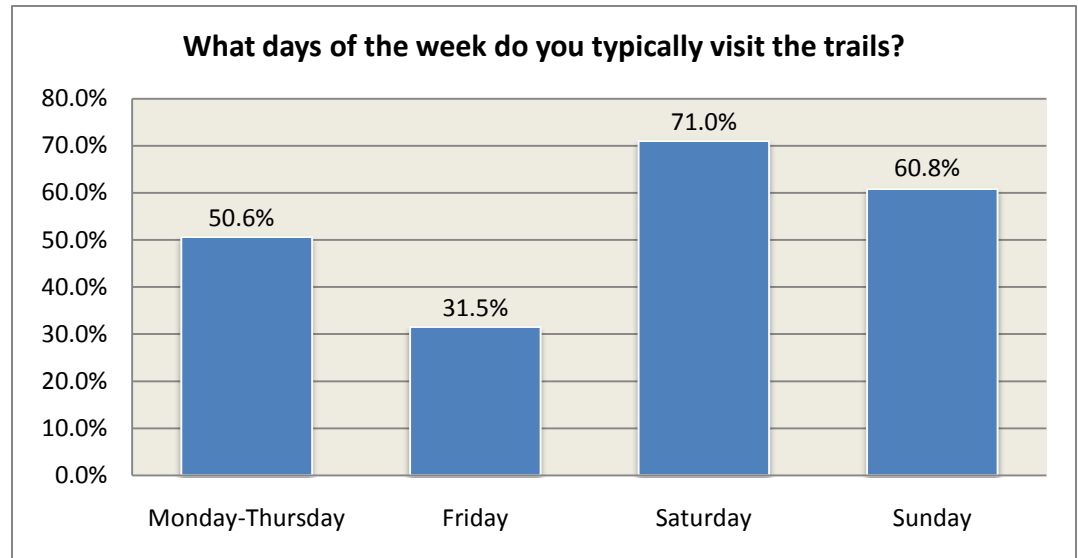
Answer Options	Response Percent	Response Count
Spring	19.4%	68
Summer	7.7%	27
Fall	18.2%	64
Winter	12.3%	43
I visit regardless of season	77.5%	272
answered question		351
skipped question		19



While not quite 8% of the respondents listed summer as their typical season for trail use, more than 77% of trail users said they visited the trails regardless of season—dispelling the belief that, while Florida’s summer heat may slow trail visitation, it clearly does not prohibit outdoor activities. Capturing 18-19% of the responses, spring and fall were seen to be the favored seasons for trail use, with winter claiming priority timing for just over 12%.

Question 11: What days of the week do you typically visit the trails? Please select all that apply.

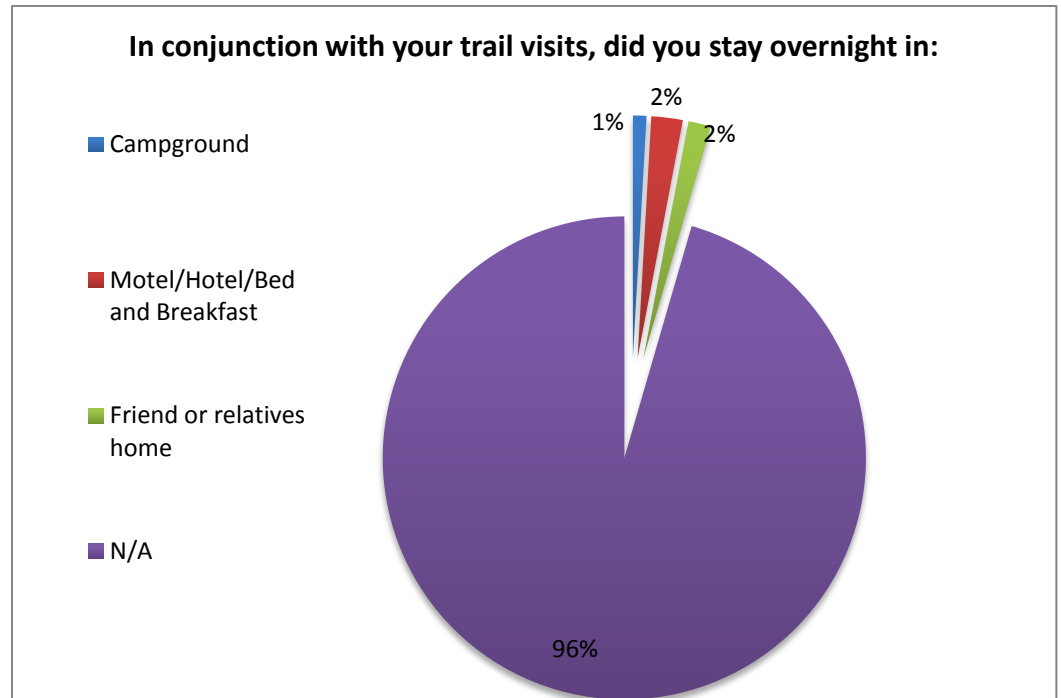
Answer Options	Response Percent	Response Count
Monday-Thursday	50.6%	178
Friday	31.5%	111
Saturday	71.0%	250
Sunday	60.8%	214
<i>answered question</i>		352
<i>skipped question</i>		18



Saturday appears to be the most typical day for trail use, although more than half of the respondents indicated that both Sunday and the Monday-Thursday time period were popular days for visiting the trails. (Note that the percentages total more than 100% due to multiple answers by respondents.)

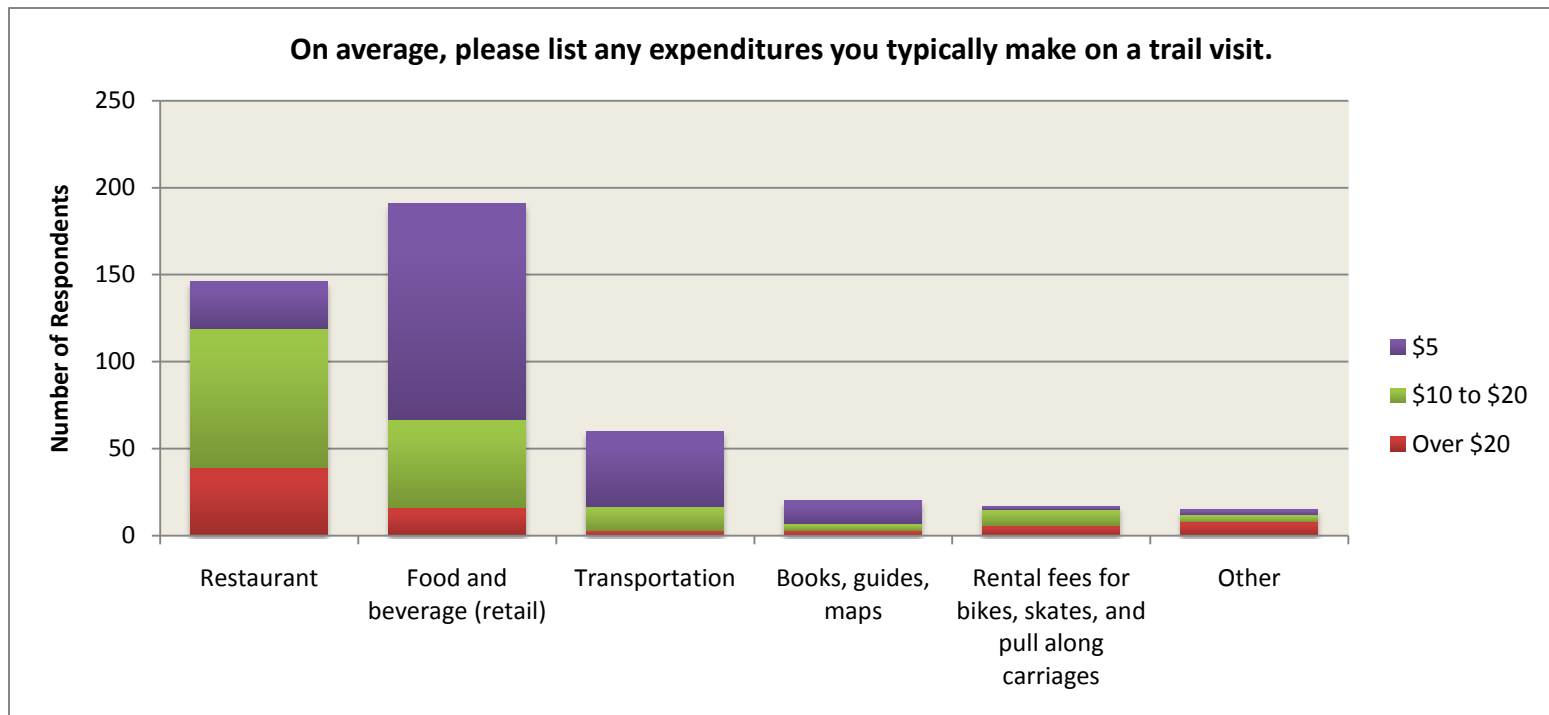
Question 12: In conjunction with your trail visits, did you stay overnight in?

Answer Options	Response Percent	Response Count
Campground	0.9%	3
Motel/Hotel/Bed and Breakfast	2.1%	7
Friend or relative's home	1.5%	5
N/A	95.5%	321
<i>answered question</i>		336
<i>skipped question</i>		34



Over 4% of those responding made an overnight stay in conjunction with their trail visit, half of which stayed in a motel/hotel/bed and breakfast. This is a higher response than was received in the face-to-face surveys on the three trails. Emphasis on marketing the Trails to tourists and advertising of overnight facilities may have a greater impact on non-resident, overnight trips to Orange County Trails.

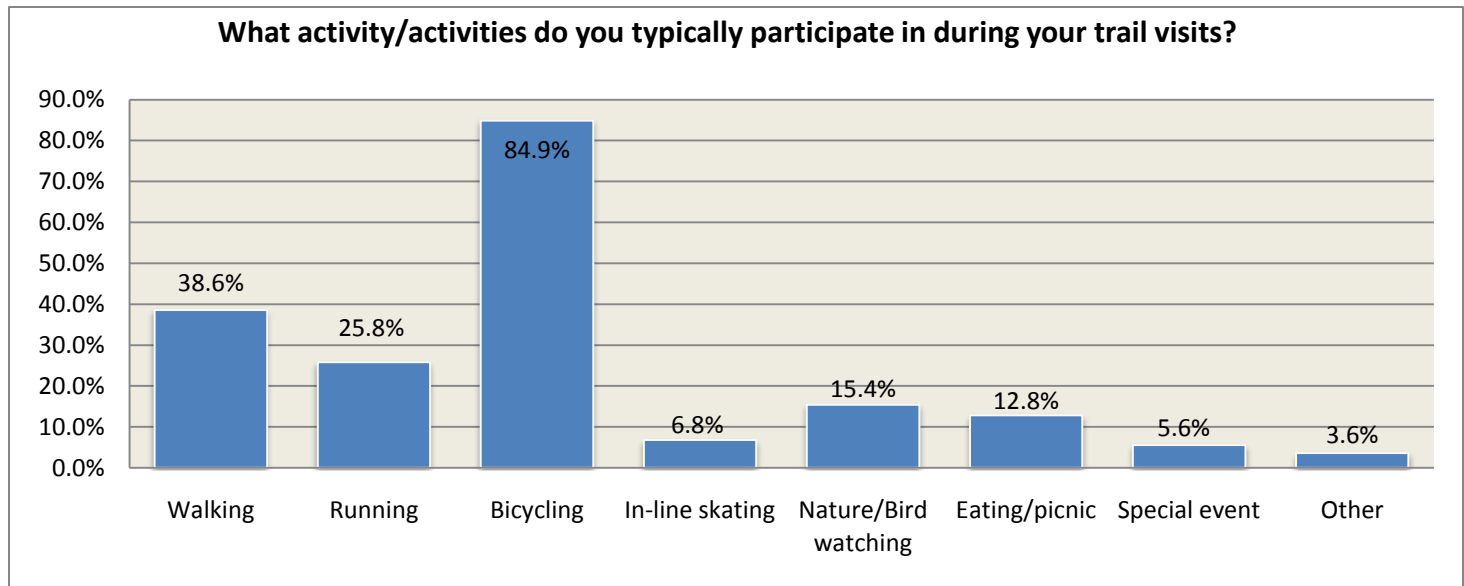
Question 13: On average, please list any expenditures you typically make on a trail visit.							
Answer Options	\$0	\$5	\$10 to \$20	Over \$20		Response Count	This was spent in Orange County
Restaurant	145	27	80	39		291	61
Food and beverage (retail)	122	124	51	16		313	73
Transportation	181	43	14	3		241	26
Books, guides, maps	203	13	4	3		223	11
Rental fees for bikes skates, and pull-along carriages	203	2	9	6		220	5
Other	122	3	4	8		137	9
<i>answered question</i>						337	
<i>skipped question</i>						33	



Question 14: What activity/activities do you typically participate in during your trail visits?

Answer Options	Response Percent	Response Count
Walking	38.6%	130
Running	25.8%	87
Bicycling	84.9%	286
Inline skating	6.8%	23
Nature/bird watching	15.4%	52
Eating/picnic	12.8%	43
Special event	5.6%	19
Other	3.6%	12
answered question		337
skipped question		33

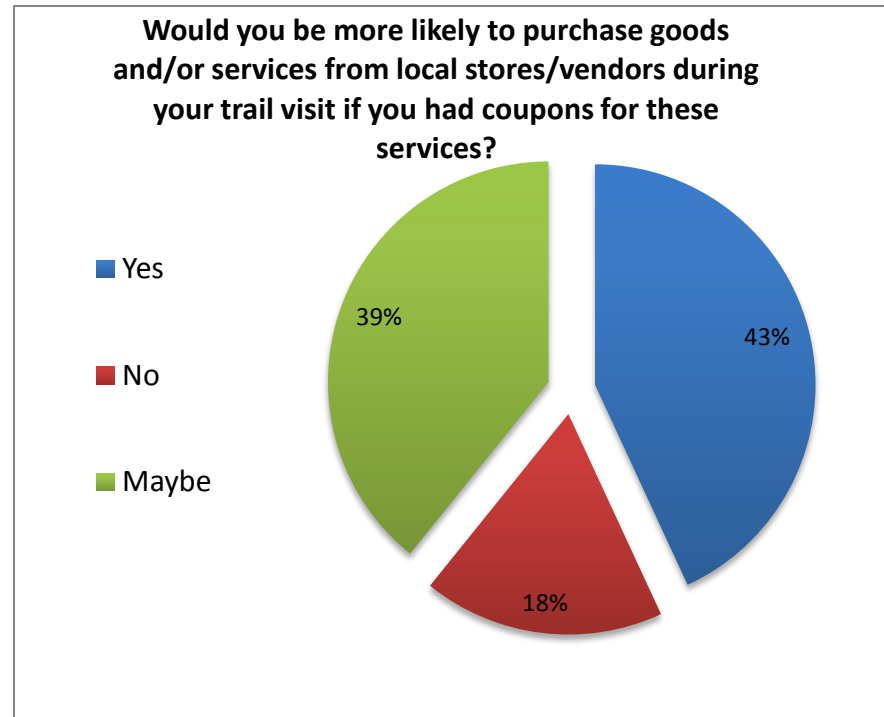
The number one activity on the Trail was bicycling, followed by walking and running. Reflective of a new trend in Central Florida, 84% of respondents use the trails for bicycling activities. Noting the popularity of bicycling, Orange County can take advantage of its central location and employment opportunities by using trails to connect residential areas with job sites and/or transit stops. Bicycling events offer an ideal target audience for marketing of trails and increasing their economic impact in the county.



Question 15: Would you be more likely to purchase goods and/or services from local stores/vendors during your trail visit if you had coupons for these services?

Answer Options	Response Percent	Response Count
Yes	43.1%	144
No	17.7%	59
Maybe	39.2%	131
<i>answered question</i>		334
<i>skipped question</i>		36

82% indicated they would be more likely to purchase goods or services from local businesses during trail visits if they had coupons. Businesses that choose to advertise and market their products to trail users potentially attract customers who will return to their establishments on other occasions.



Question 16: Would you like to see additional trail events?

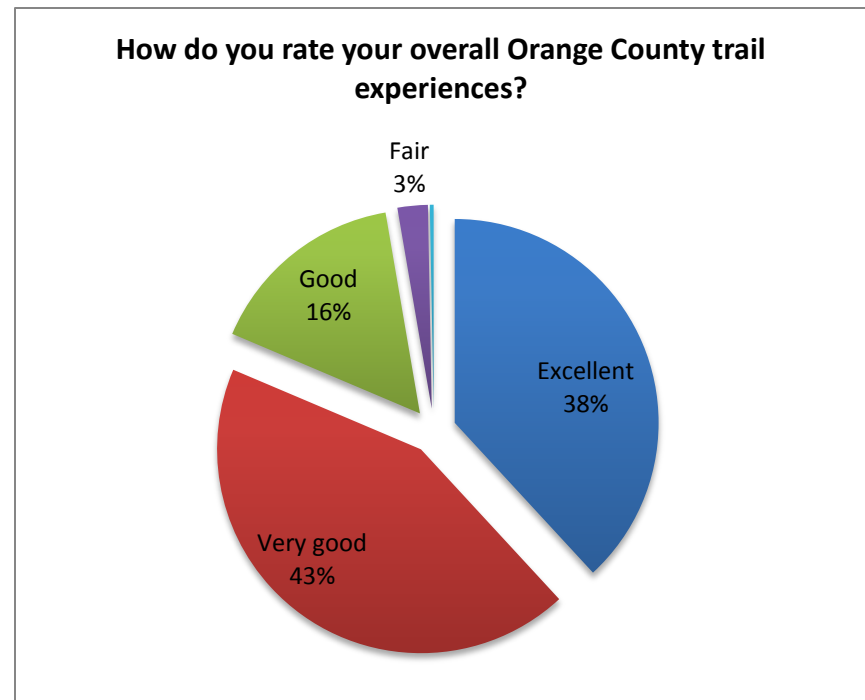
Answer Options	Response Percent	Response Count
Yes	75.3%	253
No	24.7%	83
<i>answered question</i>		336
<i>skipped question</i>		34

Trail events are clearly welcomed---over 75% of respondents indicated they would like to see more events along the trails and at trailheads.

Question 17: How do you rate your overall Orange County Trail experiences?

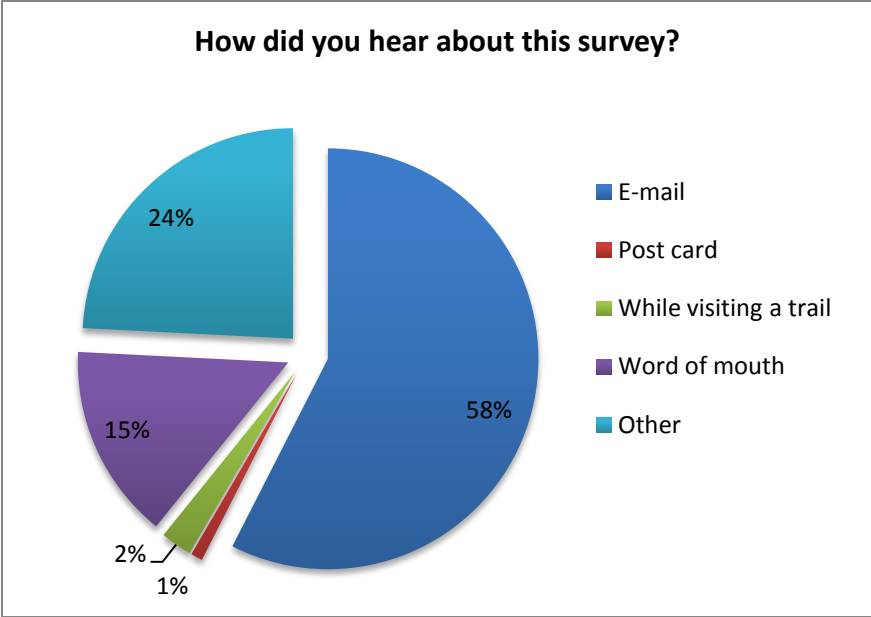
Answer Options	Response Percent	Response Count
Excellent	38.1%	127
Very good	43.2%	144
Good	15.9%	53
Fair	2.4%	8
Poor	0.3%	1
<i>answered question</i>		333
<i>skipped question</i>		37

Over 80% rated their trail experience as excellent or very good.



Question 18: How did you hear about this survey?

Answer Options	Response Percent	Response Count
Email	57.5%	188
Post card	0.9%	3
While visiting a trail	2.4%	8
Word of mouth	15.0%	49
Other	24.2%	79
<i>answered question</i>		327
<i>skipped question</i>		43

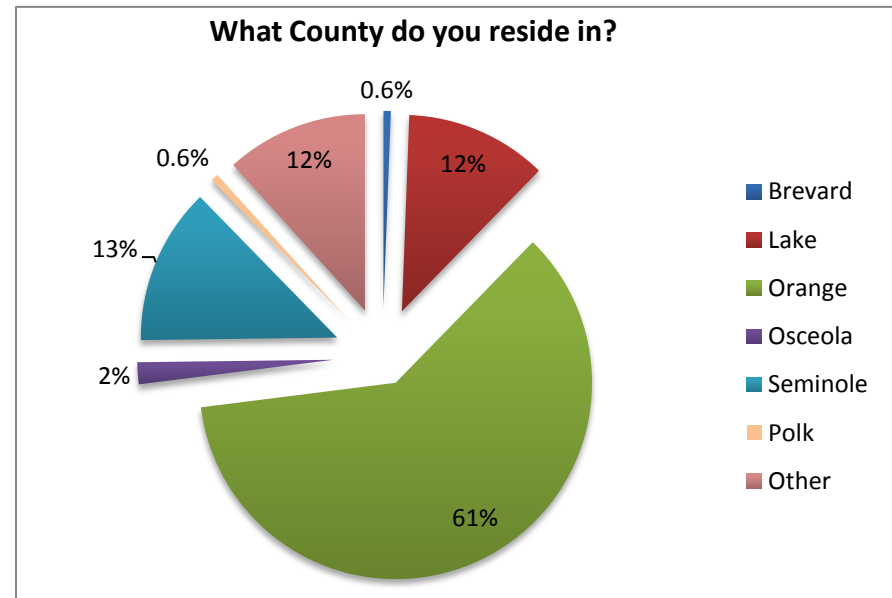


Social media is a great way to target large groups of people with similar interests. As noted in the “Other” comments, respondents were notified about the survey through contact lists associated with trail and biking groups, as well as *Facebook* and blogs.

West Orange Trail

From October through November, 163 physical, face-to-face surveys were conducted along the West Orange Trail. The following section addresses each question on the survey and analyzes the results.

Question 1: What County do you reside in?		
Answer Options	Response Percent	Response Count
Brevard	0.6%	1
Lake	11.7%	19
Orange	60.7%	99
Osceola	1.8%	3
Seminole	12.9%	21
Polk	0.6%	1
Other	11.7%	19
<i>answered question</i>		163
<i>skipped question</i>		0

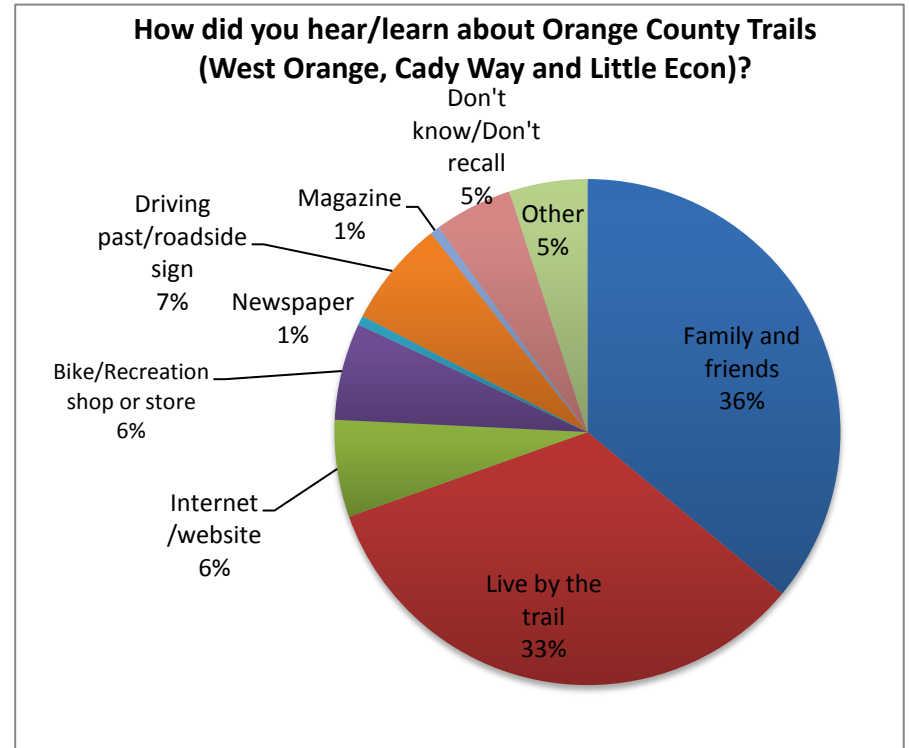


While the majority of the West Orange Trail users surveyed reside in Orange County, Lake and Seminole County residents account for 24% of those surveyed. This could be in part due to the trail connectivity between the counties, especially for Lake County. Of those surveyed 11% were visitors from outside the region or the state. Respondents from outside the region who specified their locations noted their places of residence as Tulsa, OK; Georgia; Alaska and Marion County, FL. Geographic Information Systems was used to analyze zip code responses.

Question 2: Enter your zip code of your residence. Zip codes were analyzed to determine trail proximity to user residents. See maps on pages 19- 20.

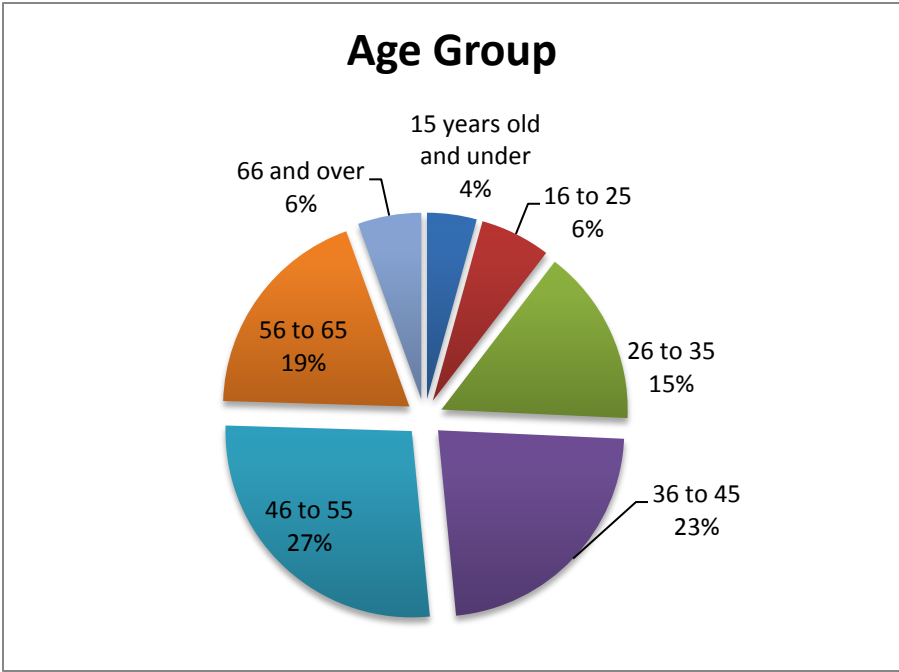
Question 3: How did you hear/learn about Orange County Trails (West Orange, Cady Way and Little Econ)?

Answer Options	Response Percent	Response Count
Family and friends	36.0%	58
Live by the Trail	33.5%	54
Internet search/website	6.2%	10
Bike/Recreation shop or store	6.2%	10
Newspaper	0.6%	1
Driving past/roadside sign	6.8%	11
Magazine	0.6%	1
Don't know/Don't recall	5.0%	8
Other	5.0%	8
answered question		161
skipped question		2



Of those surveyed, almost 70% learned about the Orange County Trail system from family or friends or due to the proximity of their homes to the Trails. With over 18% of respondents learning about the Trail through web searches, outdoor retail stores, lodging accommodations or by driving through the area, it is evident that these marketing strategies are effective. Additional and more aggressive marketing and partnerships may increase the percentage of visitors who come from outside Orange County and the region.

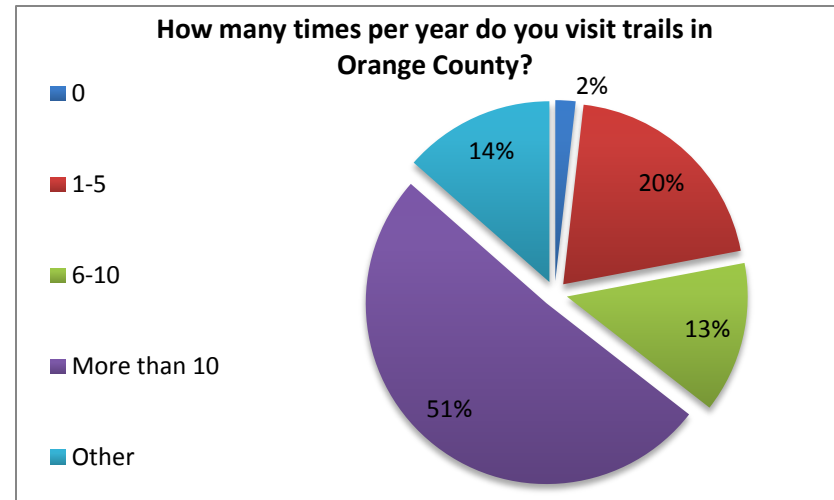
Question 4: Please check your age group.		
Answer Options	Response Percent	Response Count
15 years old and under	4.3%	7
16 to 25	6.1%	10
26 to 35	15.3%	25
36 to 45	22.7%	37
46 to 55	27.0%	44
56 to 65	19.0%	31
66 and over	5.5%	9
<i>answered question</i>		163
<i>skipped question</i>		0



Of those surveyed, the largest age groups represented were the 36 to 45 years and 46 to 55 years, making up almost 50% of respondents. The survey responses are descriptive of only those who completed the survey, not all of the individuals in a given group which, in some instances, included more children.

Question 5: How many times per year do you visit trails in Orange County (including Cady Way, Econ Trail, West Orange)?

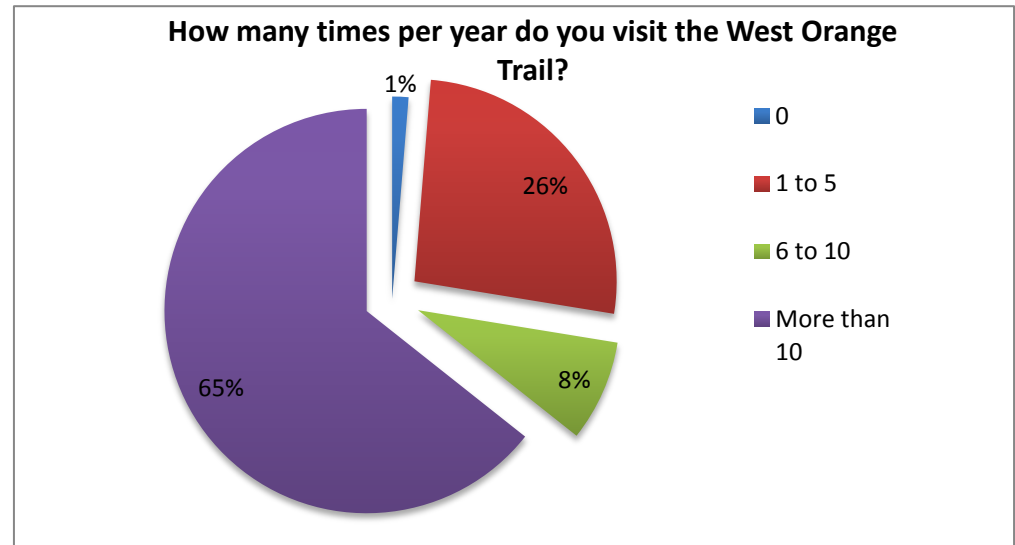
Answer Options	Response Percent	Response Count
0	1.8%	3
1-5	20.2%	33
6-10	13.5%	22
More than 10	50.9%	83
Other	13.5%	22
<i>answered question</i>		163
<i>skipped question</i>		0



Over 50% of the respondents indicated that they visit Orange County Trails more than 10 times per year. In fact, many visitors noted that they visit the trail every weekend, every day, and even twice for daily commutes to work or school. These users are assumed to encompass the 13.5% considered under “other.”

Question 6: How many times per year do you visit the West Orange Trail?

Answer Options	Response Percent	Response Count
0	1.3%	2
1 to 5	26.3%	42
6 to 10	8.1%	13
More than 10	64.4%	103
<i>answered question</i>		160
<i>skipped question</i>		3

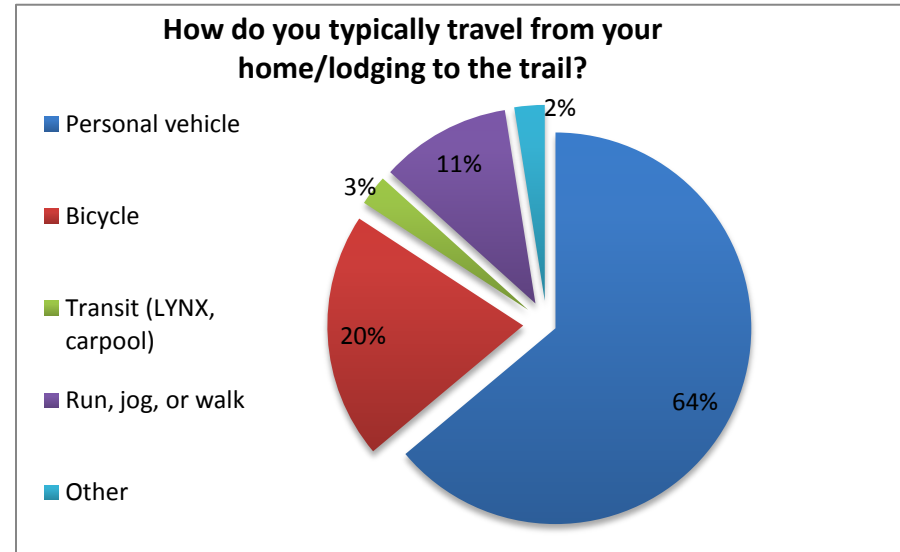


When looking at the West Orange Trail specifically, 64% use the Trail more than 10 times per year. When compared to question 5, the same assumption can be made that a portion of those indicating “more than 10” actually use the Trail on a daily or weekly basis. In future surveys, it is recommended that “weekly use” be an optional survey response.

Question 7: Where did you get on the Trail today?

The majority of respondents indicated accessing the Cady Way Trail at the Cady Way Park Trailhead. The Fashion Square Mall Trailhead was also a very popular access point. A few respondents specified Baldwin Park, Ranger Blvd., Forsythe Rd., and Lakemonte Ave as being their access points.

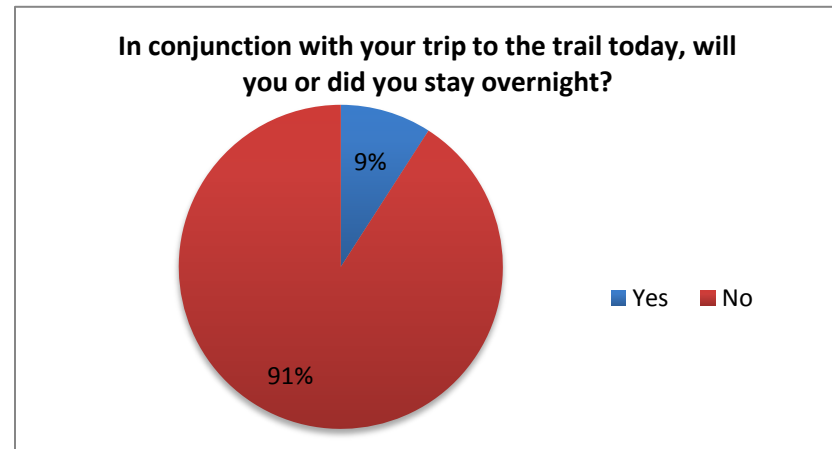
Question 8: How do you typically travel from your home/lodging to the trail?		
Answer Options	Response Percent	Response Count
Personal vehicle	63.9%	101
Bicycle	20.3%	32
Transit (LYNX, carpool)	2.5%	4
Run, jog, or walk	10.8%	17
Other	2.5%	4
<i>answered question</i>		158
<i>skipped question</i>		5



The most commonly used form of transportation from home to the Trail is by personal vehicle. Many users stated that, due to construction, dangerous roadways or no safe travel route, they have no alternative but to drive a personal vehicle to a trailhead. However, in noting that 30% of those surveyed already do access the Trail by bike or on foot and, based on comments from those interviewed, there is reason to believe that personal vehicle use would decline if there were better connectivity between trails and neighborhoods and/or increased transit routes—not only for access to trails, but also to destinations and areas of employment. Responses under “other” included travel by taxi and rollerblading.

Question 9: In conjunction with your trip to the trail today, will you or did you stay overnight?

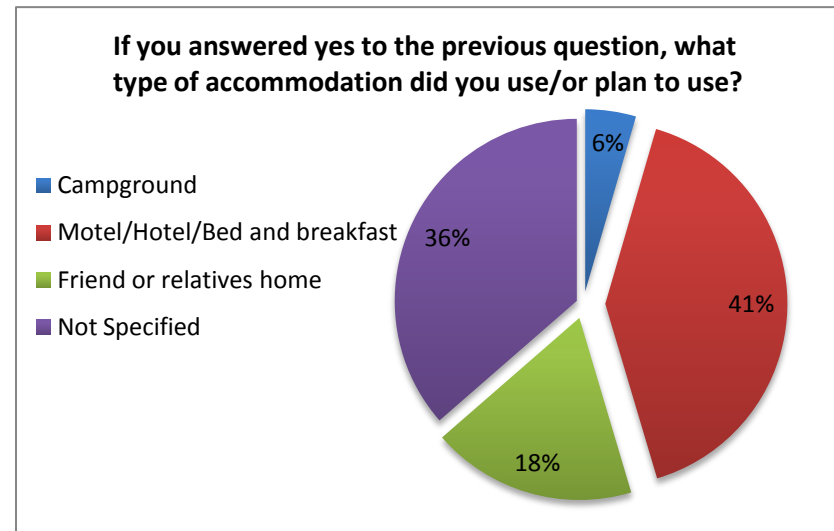
Answer Options	Response Percent	Response Count
Yes	9.1%	14
No	90.9%	140
<i>answered question</i>		154
<i>skipped question</i>		9



While the responses indicate the majority of those surveyed are local residents, who live within a day’s drive of the Trail, approximately 10% of those surveyed did spend at least one night in accommodations other than their homes, thus bringing money directly into the regional economy. Question 10 below describes the accommodation breakdown for those who answered “yes” to question 9.

Question 10: If you answered yes to the previous question, what type of accommodation did you use/or plan to use ?

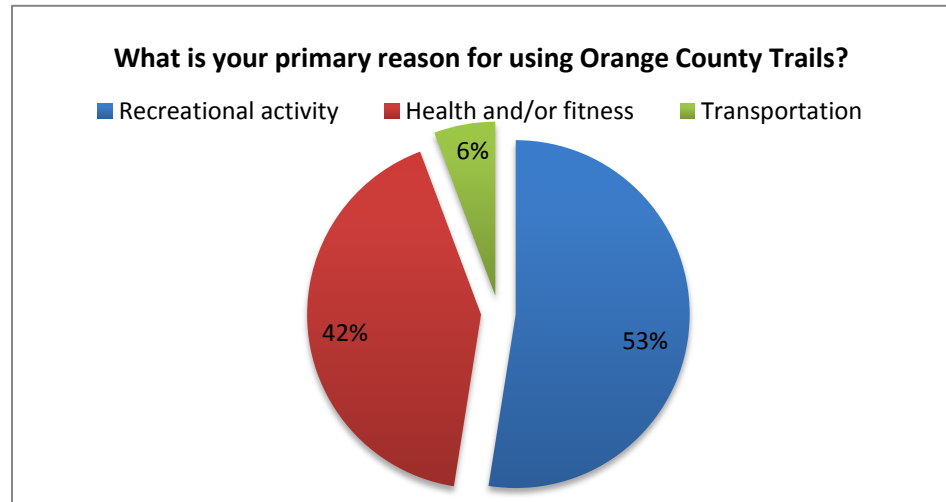
Answer Options	Response Percent	Response Count
Campground	4.5%	1
Motel/Hotel/Bed and breakfast	40.9%	9
Friend or relatives home	18.2%	4
Not Specified	36.4%	8
<i>answered question</i>		22
<i>skipped question</i>		141



41% of those surveyed were staying in a motel/hotel/bed and breakfast, followed by 18% who were visiting and staying with friends or family. While 36% did not identify the type of accommodation they used, this number may reflect the survey-takers who failed to answer question 9.

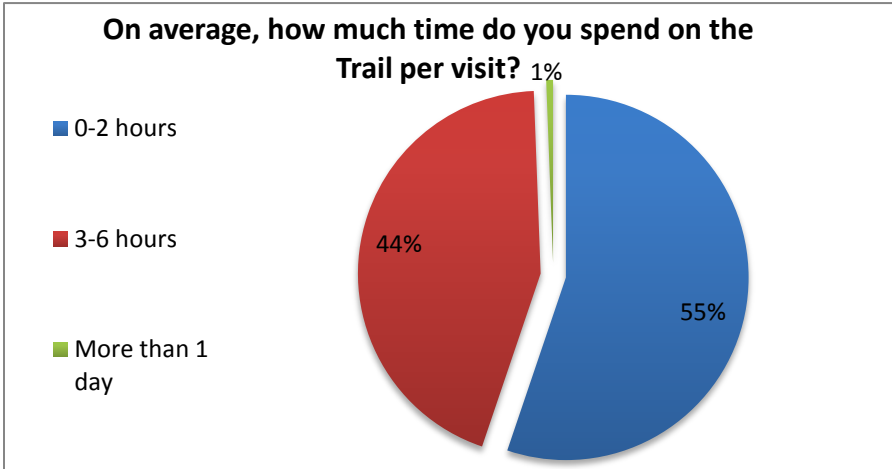
Question 11: What is your primary reason for using Orange County Trails?

Answer Options	Response Percent	Response Count
Recreational activity	52.5%	83
Health and/or fitness	41.8%	66
Transportation	5.7%	9
<i>answered question</i>		158
<i>skipped question</i>		5



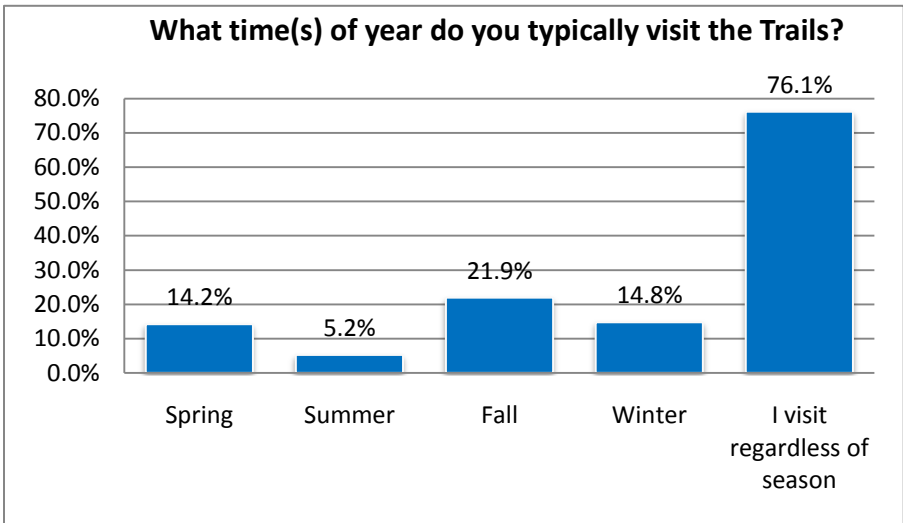
According to those surveyed along the West Orange Trail, Orange County Trails are used primarily for recreation, followed closely by health and/or fitness. The West Orange Trail is a suburban trail which runs through a trail town and does not truly connect major employment areas. Therefore, the use of this particular trail for transportation may be limited due to the types of residential areas it connects. However, it was noted that the Trail is utilized for transportation to and from school, local shops and stores and places of employment.

Question 12: On average, how much time do you spend on the trail per visit?		
Answer Options	Response Percent	Response Count
0-2 hours	55.2%	90
3-6 hours	44.2%	72
More than 1 day	0.6%	1
<i>answered question</i>		163
<i>skipped question</i>		0



Over 55% of those surveyed generally spend 0-2 hours on the West Orange Trail per visit. However, with 44% spending 3-6 hours on the Trail, this would indicate that some users approach the Trail as a full day’s activity. A visit of more than one day would indicate that this user most likely approached the Trail from the aspect of a “trip,” meaning that overnight expenditures and facilities were used expressly in conjunction with the Trail visit.

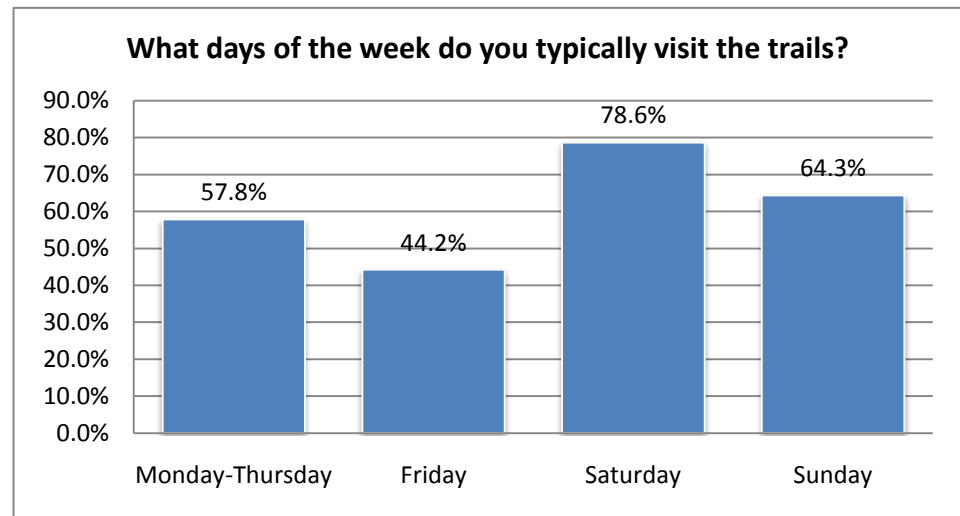
Question 13: What time(s) of year do you typically visit the Trails?		
Answer Options	Response Percent	Response Count
Spring	14.2%	22
Summer	5.2%	8
Fall	21.9%	34
Winter	14.8%	23
I visit regardless of season	76.1%	118
answered question		155
skipped question		8



Though the summer season has the least visitation of the year (5%) compared to cooler months, central Florida’s climate does not play a major role in keeping users from the trails. Over 75% of respondents say that they visit the trails regardless of season.

Question 14: What days of the week do you typically visit the trails?

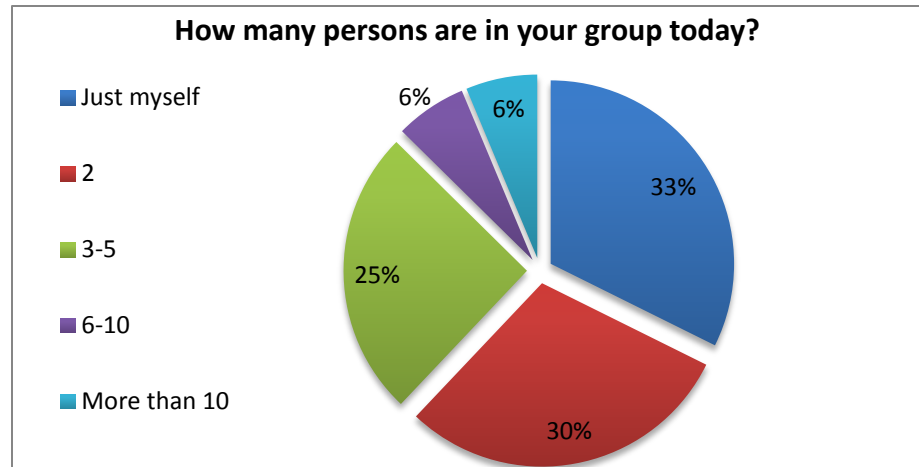
Answer Options	Response Percent	Response Count
Monday-Thursday	57.8%	89
Friday	44.2%	68
Saturday	78.6%	121
Sunday	64.3%	99
<i>answered question</i>		154
<i>skipped question</i>		9



As would be expected, Saturday and Sunday were ranked as the highest use days. However, with only a 20% point differential between the Saturday and the Monday--Thursday periods, it is evident that many trail users visit the trail almost every day of the week or any chance they get, regardless of the day. Percentages total over 100% due to some respondents noting each choice as a typical trail day due to daily usage.

Question 15: How many persons are in your group today?

Answer Options	Response Percent	Response Count
Just myself	32.3%	51
2	29.7%	47
3-5	25.3%	40
6-10	6.3%	10
More than 10	6.3%	10
<i>answered question</i>		158
<i>skipped question</i>		5

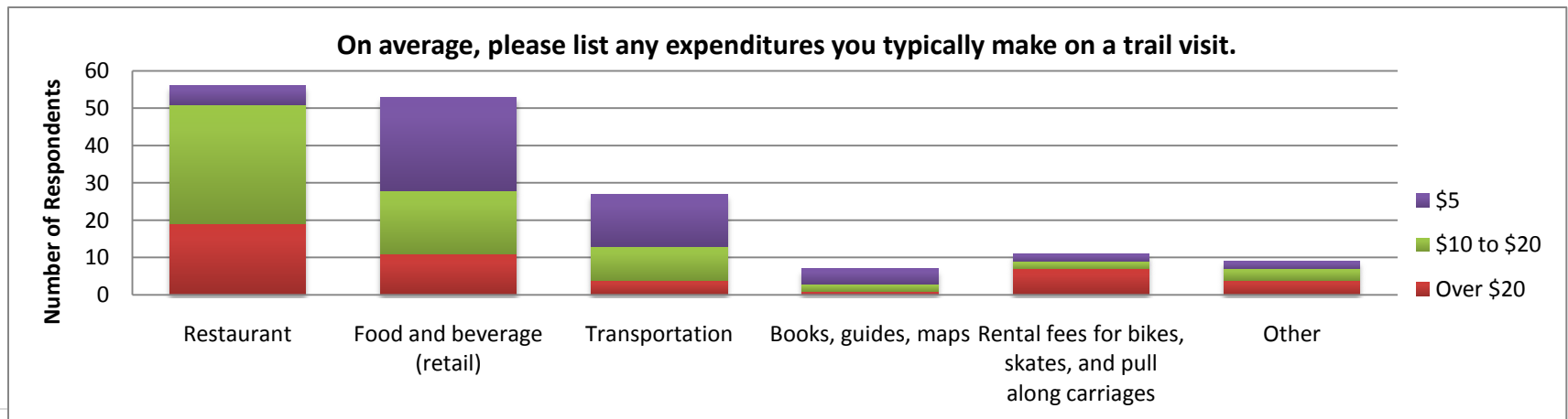


On the day the survey was taken, the majority of respondents (32.3%) had visited the trail as an individual. Slightly less than 30% were in groups of two, with 25% visiting in larger groups of 3-5. Large bike rides along the West Orange Trail often occur on weekends, as well as during the week. 6% of those surveyed were in groups of more than 10, which may represent the larger bike rides.

Question 16: On average, please list any expenditures you typically make on a trail visit.

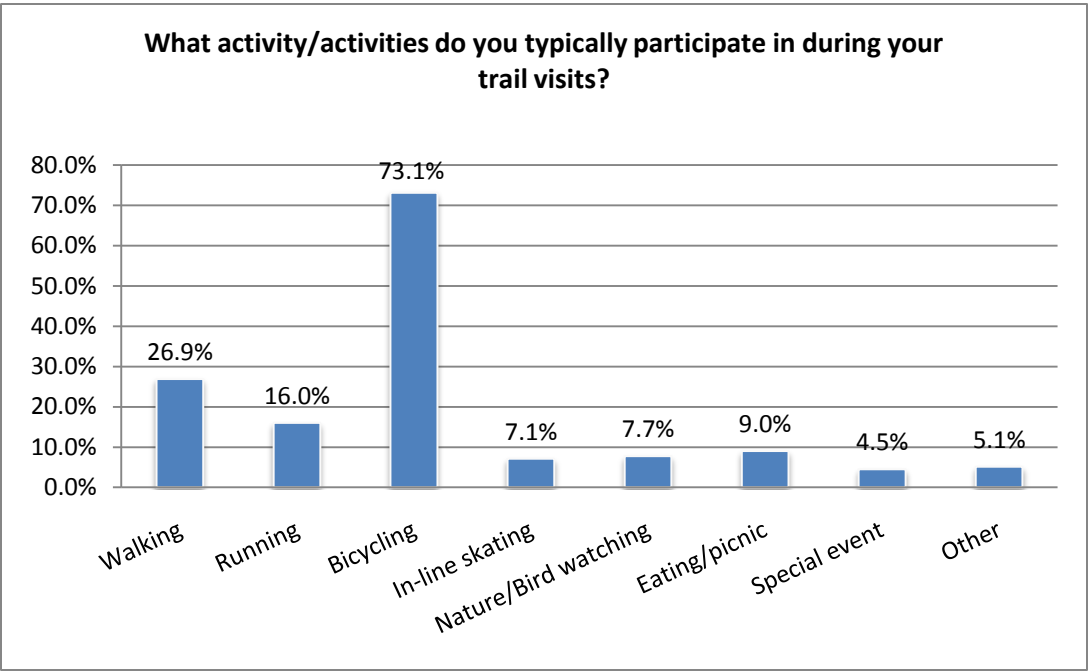
Answer Options	\$0	\$5	\$10 to \$20	Over \$20	This was spent in Orange County	Response Count
Restaurant	56	5	32	19	31	112
Food and beverage (retail)	51	25	17	11	24	104
Transportation	56	14	9	4	9	83
Books, guides, maps	71	4	2	1	2	78
Rental fees for bikes, skates and pull-along carriages	71	2	2	7	5	82
Other	43	2	3	4	6	52
<i>answered question</i>						163
<i>skipped question</i>						0

According to survey responses, the majority of expenditures by trail users are for restaurant services and food and beverages in retail stores. As would be expected, restaurant visits account for most of the expenditures in the higher levels of spending: “over \$20” and “\$10-20.” Food and beverage (retail) followed with 25 respondents spending as much as \$5 on their trail visit. According to responses indicated through “Other,” many respondents were traveling to or from bike shops in order to obtain parts for their bikes or spending for bike repairs up to \$100. One respondent indicated that she had just purchased, on that particular visit, a pair of running shoes for \$215, while another was using the trail for transportation purposes in order to purchase a new computer battery. A visitor staying in the Disney area noted expenditures of \$100 for the trail visit, ranging from taxi fares to bike rentals. The Farmers Market was another location where trail users reported spending money. One trail user commented in an interview that “real (economic) impact is people seeing how Downtown has grown...new and good restaurants and so they will return on and off bikes to Downtown.”



Question 17: What activity/activities do you typically participate in during your trail visits.

Answer Options	Response Percent	Response Count
Walking	26.9%	42
Running	16.0%	25
Bicycling	73.1%	114
In-line skating	7.1%	11
Nature/Bird watching	7.7%	12
Eating/picnic	9.0%	14
Special event	4.5%	7
Other	5.1%	8
<i>answered question</i>		156
<i>skipped question</i>		7



Bicycling was determined to be the number one activity on the West Orange Trail (73%), followed by walking at 27%. Other activities such as skating, nature watching and picnicking accounted for 33% of responses, indicating visitors use the trail for a variety of reasons beyond biking. Response total over 100% because some respondents indicated more than one activity in which they participated in during that visit.

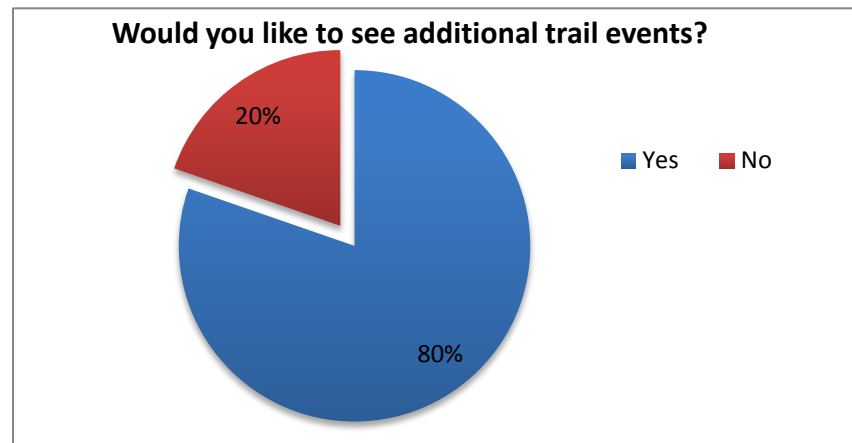
Question 18: Would you be more likely to purchase goods and/or services from local stores/vendors during your trail visit if you had coupons for these services?

Answer Options	Response Percent	Response Count
Yes	64.7%	99
No	30.1%	46
Maybe	5.2%	8
<i>answered question</i>		153
<i>skipped question</i>		10



Almost 70% of those surveyed indicated they would or may be more likely to purchase goods or services from stores during their trail visit if they had coupons from these vendors.

Question 19: Would you like to see additional trail events?		
Answer Options	Response Percent	Response Count
Yes	80.3%	110
No	19.7%	27
<i>answered question</i>		137
<i>skipped question</i>		26

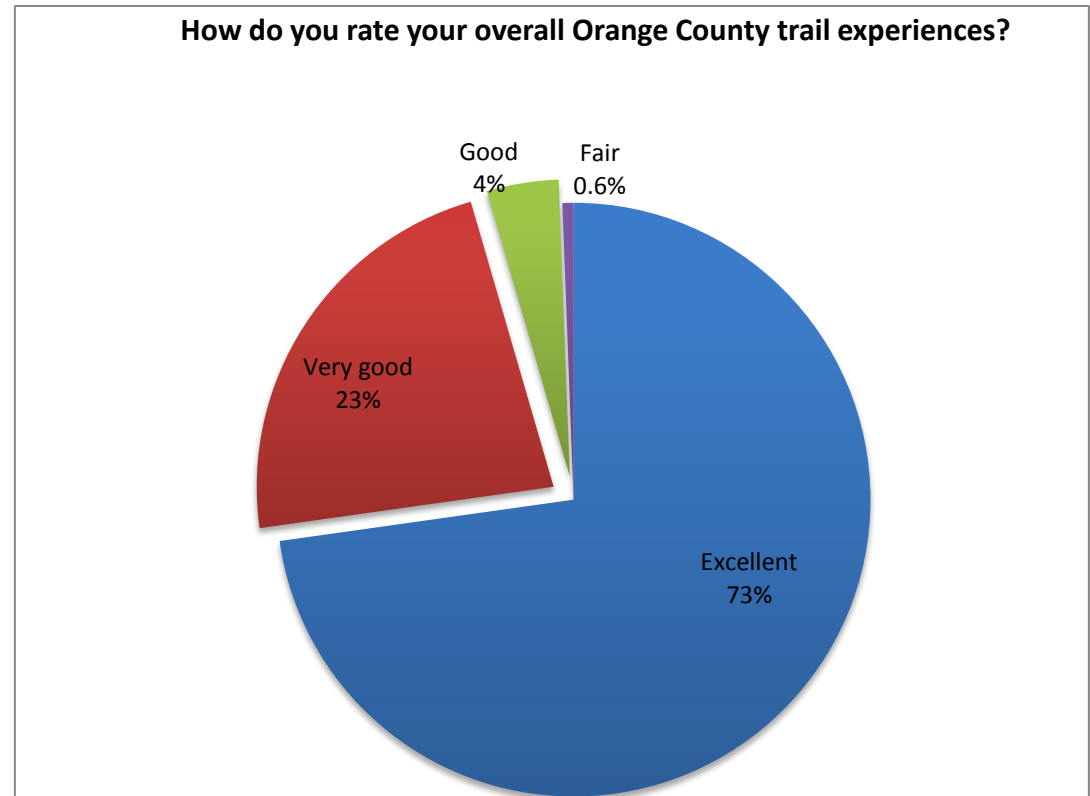


80% of survey respondents indicated that they would like to see additional trail events along the West Orange Trail, as well as on other trails in Orange County. Through some of the verbal responses, recommendations were made that large events should be limited to a few weekends per year.

In addition, events which promote the serenity and environmental aspects of the trail would also be welcomed. However, the suggestions were made that even these events should be limited so as not to take away from the personal “experience” of visiting a trail.

Question 20: How do you rate your overall Orange County trail experiences?

Answer Options	Response Percent	Response Count
Excellent	72.7%	112
Very good	22.7%	35
Good	3.9%	6
Fair	0.6%	1
Poor	0.0%	0
<i>answered question</i>		154
<i>skipped question</i>		9



Overall, 95% of those surveyed rated their trail experience as very good to excellent, while no respondents indicated a poor experience. Twenty-three additional comments were provided and can be found in the appendix of this report.

Comments from West Orange Trail Survey:

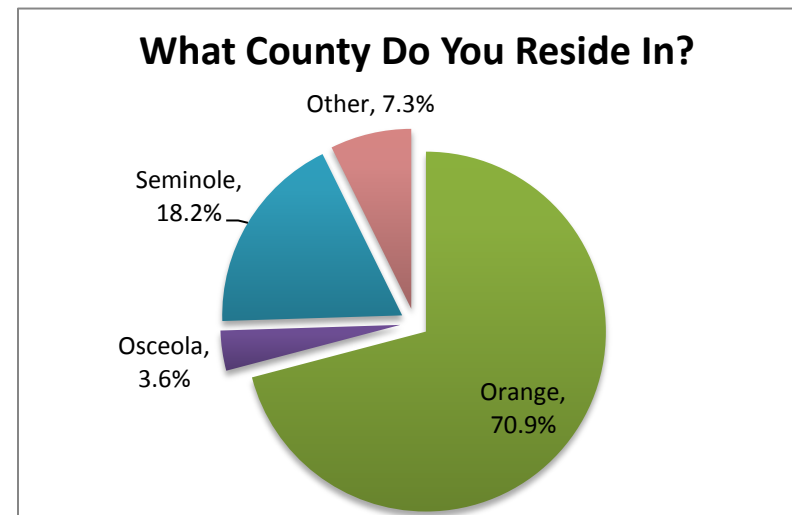
- We love the trail for rollerblading biking running and walking. We love that it is SAFE. It is SAFE for a woman alone - I have been coming here over 15 years. Also love how CLEAN it is.
- Would like to ride after night with lights on
- Awesome job on maintaining the trail for safety and enjoyment. I've lived in Orange County for almost 40 years and have never been to Winter Garden until I started using trails. We have had great times!
- Need nighttime hours and lighting
- Bought house because of closeness to the trail
- Need bike racks in the downtown
- Thank you for giving me an opportunity to fill this out.
- More trails please :)
- Enjoy nice clean and safe bathrooms
- Enjoy clean and pot hole free walkways
- All the road crosses (crossings) are a concern. I like the trails going through small towns or downtown areas. It is nice to stop and have a bite or drinks. I also enjoy the shade on the trails.
- Better enforcement by Apopka on street traffic speed at crossing
- Orange County trails are some of the best. Need to keep support going; We have been all over the country.
- We would like to volunteer to help patrol class to ID violators; Have a number to call in when we view bad behavior on the trail.
- I like the bike trail, it's very refreshing, relaxing, and calming. Oh, and also the cold weather is excellent.
- The real impact is people seeing how Downtown has grown; New and good restaurants and so they will return on and off bikes to downtown.
- I'm a Rail-To-Trail contributor and love to ride.
- Some spots on the trail need to be cleaned off a little more often of debris.
- Having destinations or parks along trails or at trailheads are great when biking with families. We generally only start/finish where there is stuff for kids.
- Additional water stops would be nice.
- We enjoy the safety and tranquility offered at the trails.
- Bathrooms should be open before 7:00.

- More port a potty and toilet paper.
- Need to keep up on the bathrooms - portajohn out of toilet paper. Bathrooms need to be open earlier.
- I use the trail for marathon training, and like to run here because the trail has 1/2 mile markers, and I rarely have to cross roads. My wife and I use the trail several times per week to walk our dog.
- I like the Killarney part of the trail best. I use Killarney but Mon.-Thurs., I do Winter Garden because of my sons school. I don't like Winter Garden only because there's way to much dog poop on the walkway; needs to be cleaned up that's gross.
- Taxi \$60 Disney; \$10/hour bike rental x3 hours.

Cady Way

From October through November, 55 physical, face-to-face surveys were conducted along the Cady Way Trail. The following section addresses each question on the survey and analyzes the results.

Question 1: What County do you reside in?		
Answer Options	Response Percent	Response Count
Orange	70.9%	39
Osceola	3.6%	2
Seminole	18.2%	10
Other	7.3%	4
<i>answered question</i>		55
<i>skipped question</i>		0

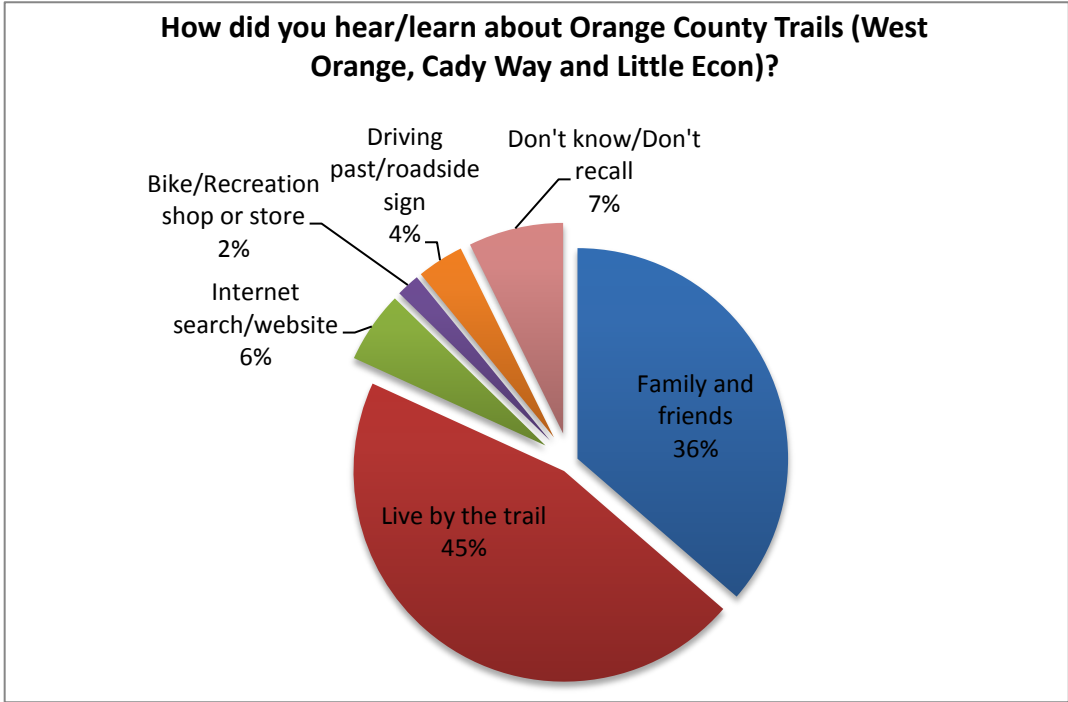


While the majority (71%) of the Cady Way Trail users surveyed resides in Orange County, Osceola and Seminole County residents account for 22% of those surveyed. This could be due, in part, to the trail connectivity between the counties, especially for Seminole County where there is a connection with the Cross Seminole Trail. Of those surveyed, 7% were visitors from outside the region and even the state, including Providence, RI; Madison, WI and Miami-Dade County, FL. Geographic Information Systems was used to analyze zip code responses.

Question 2: Enter your zip code of your residence. Zip codes were analyzed to determine trail proximity to user residents. See maps on pages 19- 20.

Question 3: How did you hear/learn about Orange County Trails (West Orange, Cady Way and Little Econ)?

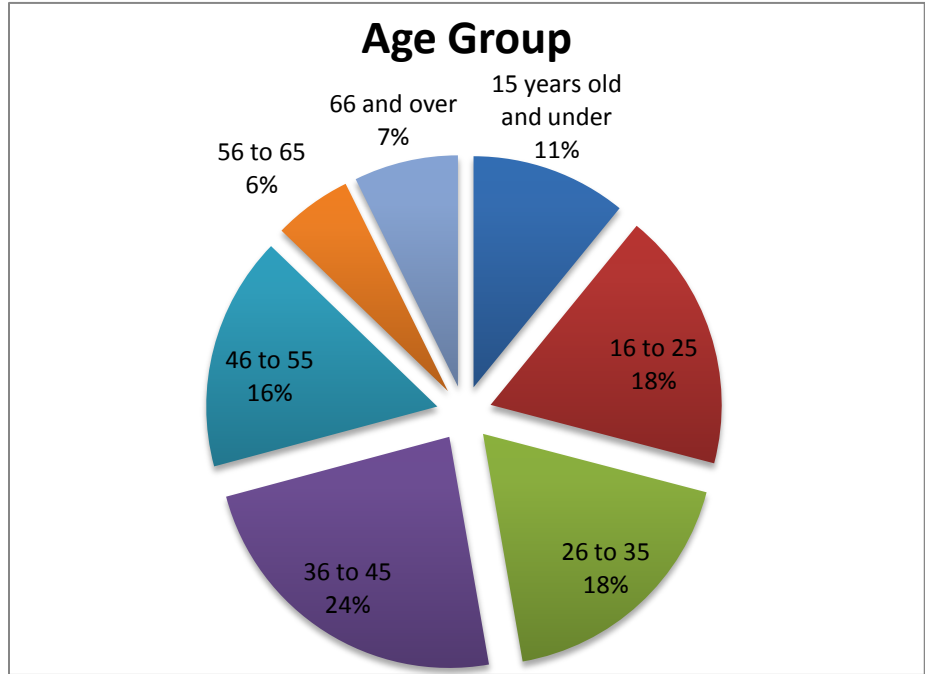
Answer Options	Response Percent	Response Count
Family and friends	36.4%	20
Live by the trail	45.5%	25
Internet search/website	5.5%	3
Bike/Recreation shop or store	1.8%	1
Newspaper	0.0%	0
Driving past/roadside sign	3.6%	2
Magazine	0.0%	0
Don't know/Don't recall	7.3%	4
Other	0.0%	0
<i>answered question</i>		55
<i>skipped question</i>		0



Location of the Trail to places of residency and word of mouth are currently the most effective methods of marketing the Cady Way Trail, according to those surveyed. Over 80% of those surveyed indicated that they learned about the Trail through family and friends or as a result of living near the Trail. With only 5.5% learning about the trails from the Internet and another 3.6% who become aware of them from signs or driving by, there is clearly value to be had in improving marketing strategies in these areas. It was noted during the surveying period that recognizing the Cady Way Trail (CWT) or finding access to the Trail as a novice CWT visitor was difficult due to lack of signage and directions to the Trail.

Question 4: Please check your age group.

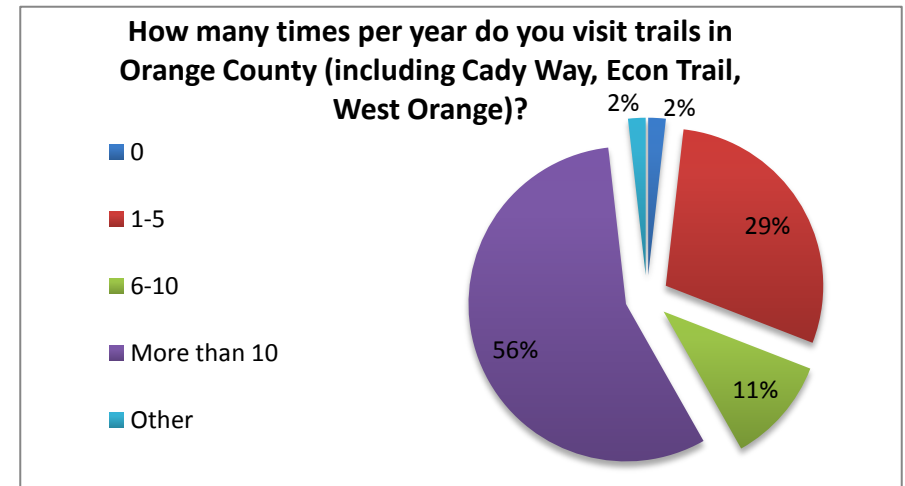
Answer Options	Response Percent	Response Count
15 years old and under	10.9%	6
16 to 25	18.2%	10
26 to 35	18.2%	10
36 to 45	23.6%	13
46 to 55	16.4%	9
56 to 65	5.5%	3
66 and over	7.3%	4
<i>answered question</i>		55
<i>skipped question</i>		0



Survey responses concerning age are not considered drastically different. The majority of those surveyed are between the ages of 16 to 55. Again, it should be noted that the data obtained from this question pertains to the individual answering the survey, not every individual in the group. Therefore, the numbers of those under 15 may actually increase as families are not reflected in this analysis. The Cady Way Trail’s location relative to residential neighborhoods, schools, and multi-family housing, as well as its urban nature, could explain the higher number of trail users under the age of 15. The Trail creates greater connectivity of neighborhoods, parks, schools and other facilities, giving younger trail users the ability to visit these places without the use of a car.

Question 5: How many times per year do you visit trails in Orange County (including Cady Way, Econ Trail, West Orange)?

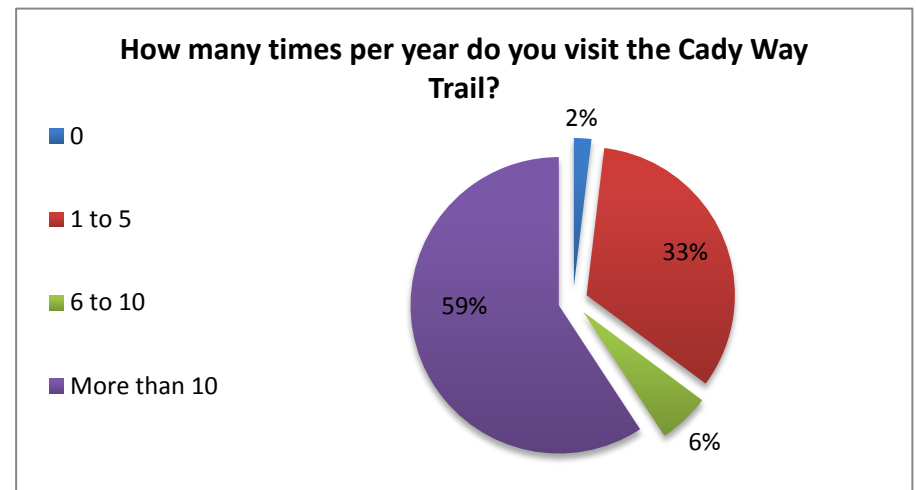
Answer Options	Response Percent	Response Count
0	1.8%	1
1-5	29.1%	16
6-10	10.9%	6
More than 10	56.4%	31
Other	1.8%	1
<i>answered question</i>		55
<i>skipped question</i>		0



Over 56% of those surveyed are avid trail users, utilizing the trails more than 10 times per year. Almost 30% of the respondents use the Orange County Trail system one to five times per year and 11% visit six to ten times per year.

Question 6: How many times per year do you visit the Cady Way Trail?

Answer Options	Response Percent	Response Count
0	1.9%	1
1 to 5	33.3%	18
6 to 10	5.6%	3
More than 10	59.3%	32
<i>answered question</i>		54
<i>skipped question</i>		1

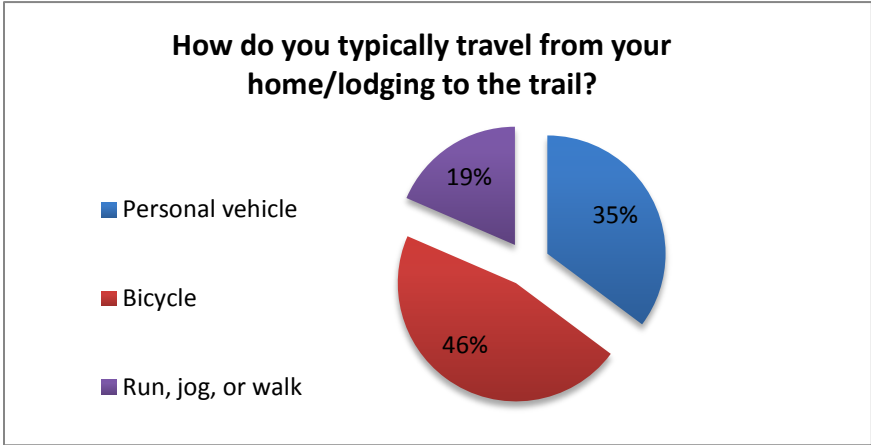


Almost 60% of those surveyed use the Cady Way Trail, specifically, more than ten times per year. During interviews with some of the trail users, they indicated that they use the Trail daily to take their children to school or for their route to work, which would indicate they use the Trail approximately 5 times per week. 33% visit the Cady Way Trail from 1 to 5 times per year.

Question 7: Where did you get on the trail today?

Respondents wrote in the location in which they accessed the Little Econ Greenway. Blanchard Park was the overwhelming location, while others indicated they got on the trail in Oviedo (Cross Seminole Trail), or their residence.

Question 8: How do you typically travel from your home/lodging to the trail?		
Answer Options	Response Percent	Response Count
Personal vehicle	35.2%	19
Bicycle	46.3%	25
Transit (LYNX, carpool)	0.0%	0
Run, jog, or walk	18.5%	10
Other	0.0%	0
<i>answered question</i>		54
<i>skipped question</i>		1

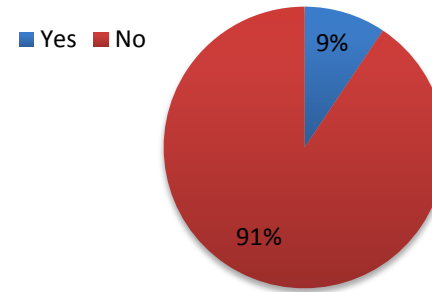


The fact that over 65% of those surveyed travel to the trail by bike or foot is a great indicator that location plays an essential part in trail use and travel. Those who live by the trail do utilize it. As expected, a large percentage (35%) travels to the trail using personal vehicles. Transit received no responses on this survey, despite the urban nature and transit service available in Orlando and Orange County. However, as noted by one respondent, the existing transit stops and routes do not encourage use of the Trail system; therefore, better planning and outreach efforts between neighborhoods, apartment complexes, trailheads or crossings, and other core stops would encourage more residents to take advantage of other forms of transportation to the trails.

Question 9: In conjunction with your trip to the trail today, will/did you stay overnight?

Answer Options	Response Percent	Response Count
Yes	9.4%	5
No	90.6%	48
<i>answered question</i>		53
<i>skipped question</i>		2

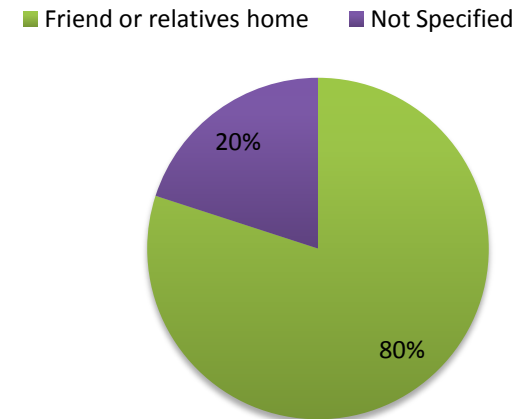
In conjunction with your trip to the trail today, will/did you stay overnight?



Question 10: If you answered yes to the previous question, what type of accommodation did you stay/or do you plan on staying in?

Answer Options	Response Percent	Response Count
Campground	0.0%	0
Motel/Hotel/Bed and Breakfast	0.0%	0
Friend or relatives home	80.0%	4
Not Specified	20.0%	1
<i>answered question</i>		5
<i>skipped question</i>		50

If you answered yes to the previous question, what type of accommodation did you stay/or do you plan on staying in?



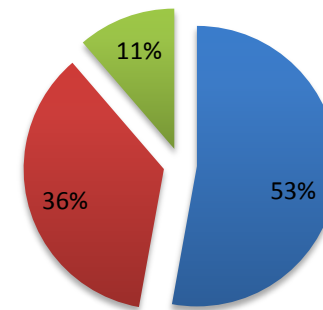
Of the 9% (5 respondents) who indicated they stayed overnight in conjunction with their trail visit, 80% (4) stayed at a friend's or relative's home. This could suggest that more effort be placed on tourism-oriented development along the trail, such as marketing strategies aimed at hotels or bed and breakfast establishments.

Question 11: What is your primary reason for using Orange County trails?

Answer Options	Response Percent	Response Count
Recreational activity	52.8%	28
Health and/or fitness	35.8%	19
Transportation	11.3%	6
<i>answered question</i>		53
<i>skipped question</i>		2

What is your primary reason for using Orange County trails?

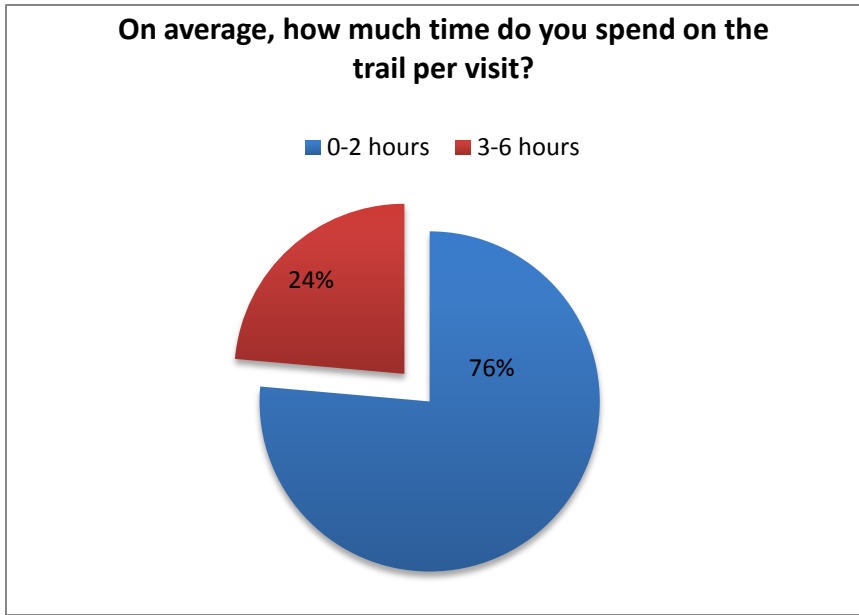
■ Recreational activity ■ Health and/or fitness ■ Transportation



Over 52% of those surveyed use the Orange County Trail system for recreational activity, followed by almost 36% for purposes of health and/or fitness. 11% of respondents indicated that transportation was their primary reason for using the trail. This would include transportation to school, work or for other daily needs.

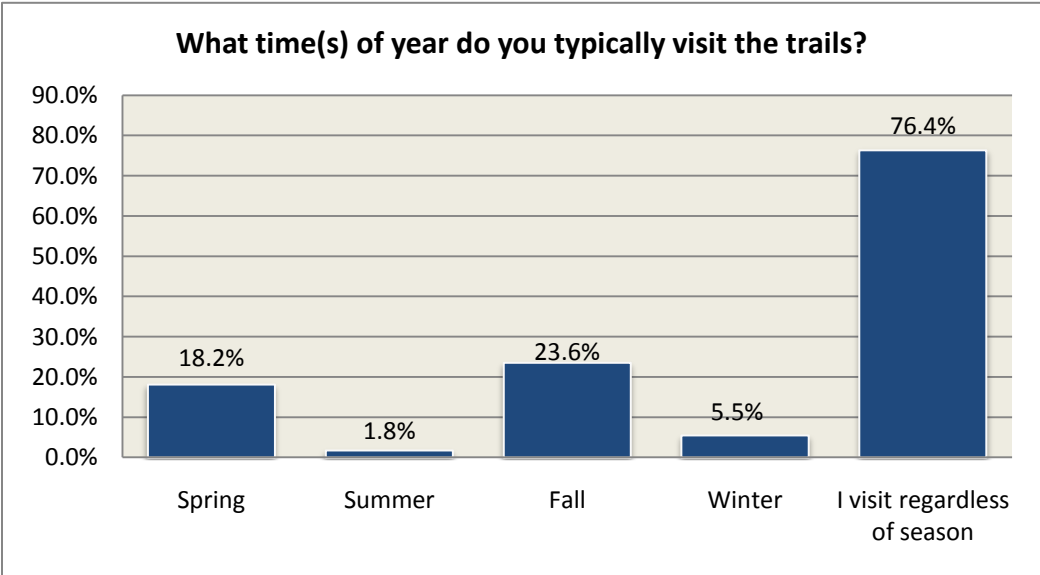
Question 12: On average, how much time do you spend on the trail per visit?

Answer Options	Response Percent	Response Count
0-2 hours	76.4%	42
3-6 hours	23.6%	13
More than 1 day	0.0%	0
<i>answered question</i>		55
<i>skipped question</i>		0



Over 75% of respondents generally spend, on average, 0-2 hours on the Cady Way Trail, with just under 25% spending 3-6 hours. The relatively short length of the Trail may affect the time spent there. One could anticipate that when the connection is made between the Little Econ and the Cady Way Trails, the amount of time spent on the trail could increase. responses are lower than that of the West Orange Trail, which had closer to a 50/50 split between the two categories. This could be attributed to the length of the trail or the accessibility of facilities such as Downtown Winter Garden and other stops along the trail.

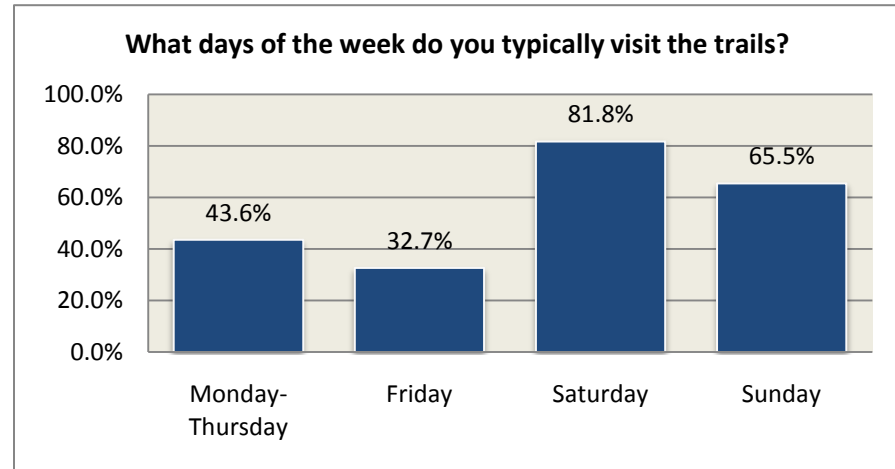
Question 13: What time(s) of year do you typically visit the trails?		
Answer Options	Response Percent	Response Count
Spring	18.2%	10
Summer	1.8%	1
Fall	23.6%	13
Winter	5.5%	3
I visit regardless of season	76.4%	42
<i>answered question</i>		55
<i>skipped question</i>		0



According to survey responses, central Florida’s climate does not play a major role in keeping users from the Trail as over 76% of respondents visit the trail regardless of season. Among the respondents who noted one particular time of year, the transitional seasons, fall and spring, have the highest number of trail visits. Summer has the fewest visitors as less than 2% indicated that they typically visit the trails at this time of year.

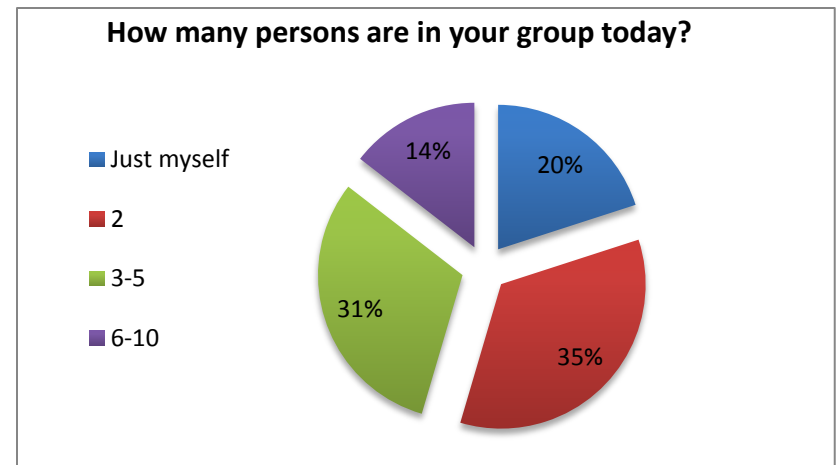
Question 14: What days of the week do you typically visit the trails?

Answer Options	Response Percent	Response Count
Monday-Thursday	43.6%	24
Friday	32.7%	18
Saturday	81.8%	45
Sunday	65.5%	36
<i>answered question</i>		55
<i>skipped question</i>		0



As would be expected, Saturday and Sunday were ranked as the highest use days. Percentages total over 100% due to the fact that some respondents apparently use the Cady Way Trail daily and noted multiple choices as their typical day to visit the Trail. It is evident that many trail users visit the trail almost every day of the week, or any chance they get, regardless of the day.

Question 15: How many persons are in your group today?		
Answer Options	Response Percent	Response Count
Just myself	20.0%	11
2	34.5%	19
3-5	30.9%	17
6-10	14.5%	8
More than 10	0.0%	0
<i>answered question</i>		55
<i>skipped question</i>		0

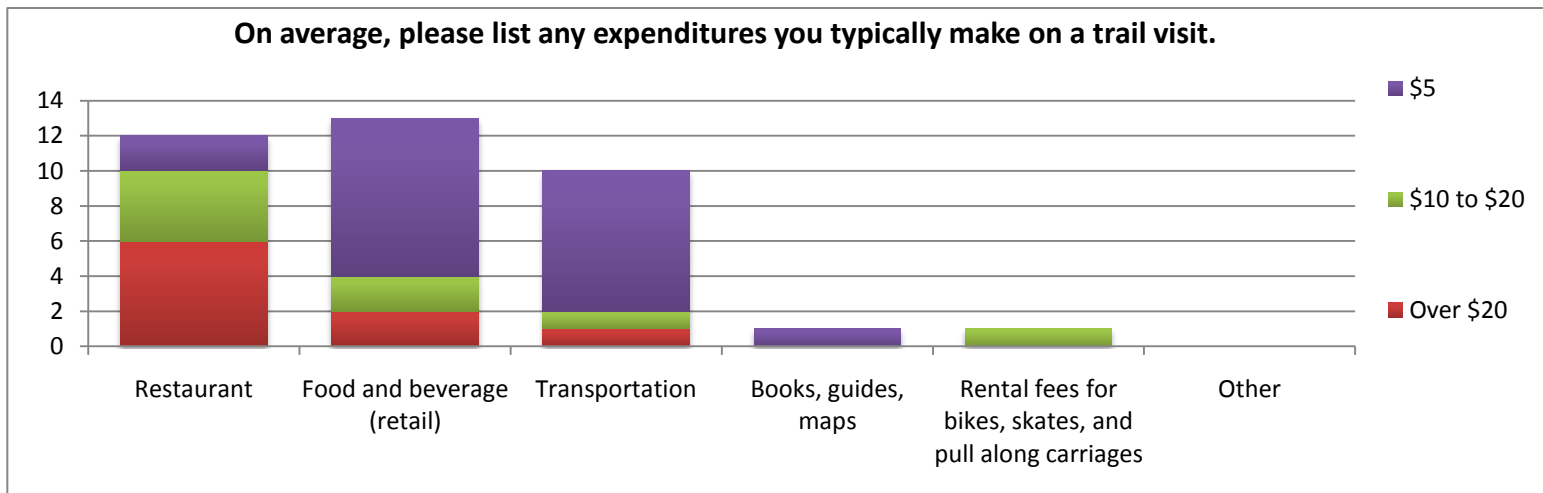


Of those surveyed, no great variation was noted between the numbers in each group. However, unlike the surveys completed for the West Orange Trail, no respondent indicated there were more than 10 individuals in the group on the trail. Large bike groups do not appear to frequent the Cady Way Trail as they seemingly prefer longer trails, such as the West Orange Trail.

Question 16: On average, please list any expenditures you typically make on a trail visit.

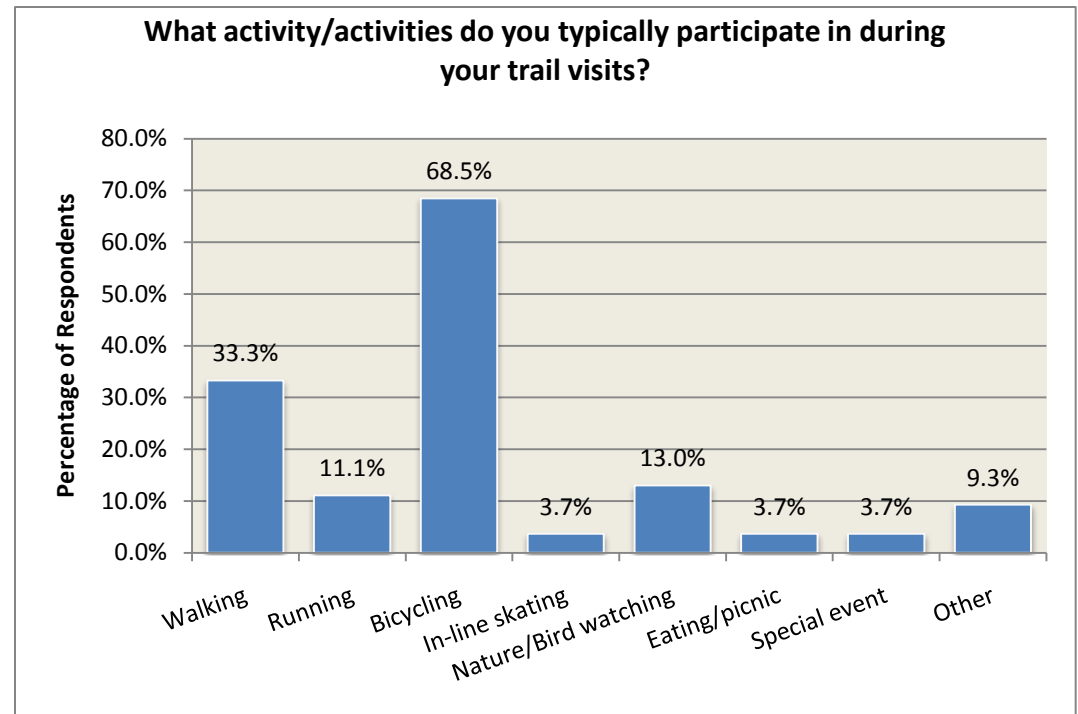
Answer Options	\$0	\$5	\$10 to \$20	Over \$20	This was spent in Orange County	Response Count
Restaurant	26	2	4	6	4	38
Food and beverage (retail)	24	9	2	2	2	37
Transportation	28	8	1	1	7	38
Books, guides, maps	32	1	0	0	0	33
Rental fees for bikes, skates and pull-along carriages	32	0	1	0	0	33
Other	12	0	0	0	0	12
<i>answered question</i>						55
<i>skipped question</i>						0

According to survey responses, the retail food and beverage expenditures made up the highest category of expenditures by trail users, as thirteen respondents indicated they spend at least \$5 in this category per trip. However, as would be expected, restaurant visits account for the greatest number of respondents (6) who spent over \$20. As noted on the comment section of the survey, one family generally spends more than \$20 for ice cream when they travel on the Trail to Baldwin Park. Survey comments included suggestions that mobile vendors be located along the trail for the sale of beverages or snacks. In order to access stores, restaurants and retail areas near the Cady Way Trail, trail users must exit the trail, which some find undesirable due to distance, accessibility or safety issues.



Question 17: What activity/activities do you typically participate in during your trail visits?

Answer Options	Response Percent	Response Count
Walking	33.3%	18
Running	11.1%	6
Bicycling	68.5%	37
Inline skating	3.7%	2
Nature/Bird watching	13.0%	7
Eating/picnic	3.7%	2
Special event	3.7%	2
<i>answered question</i>		54
<i>skipped question</i>		1



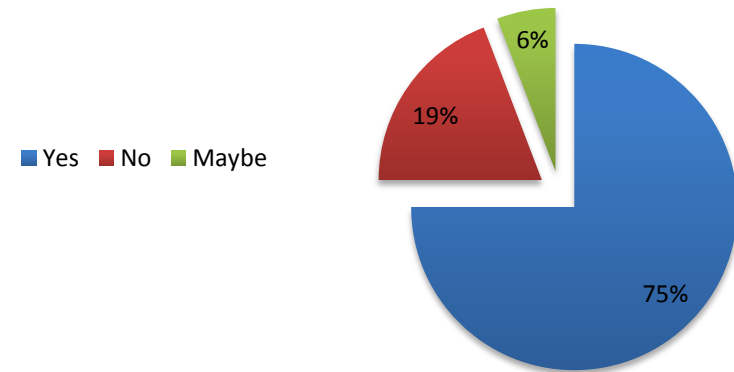
Bicycling was noted as the typical activity on the Cady Way Trail by 69% of those surveyed. 33% of the respondents primarily walk the Trail. Percentages totaled over 100% due to some respondents indicating a variety of activities they typically take part in while on the Trail. Additional activities noted included visiting playgrounds and using child non-motorized scooters.

Question 18: Would you be more likely to purchase goods

and/or services from local stores/vendors during your trail visit if you had coupons for these services?

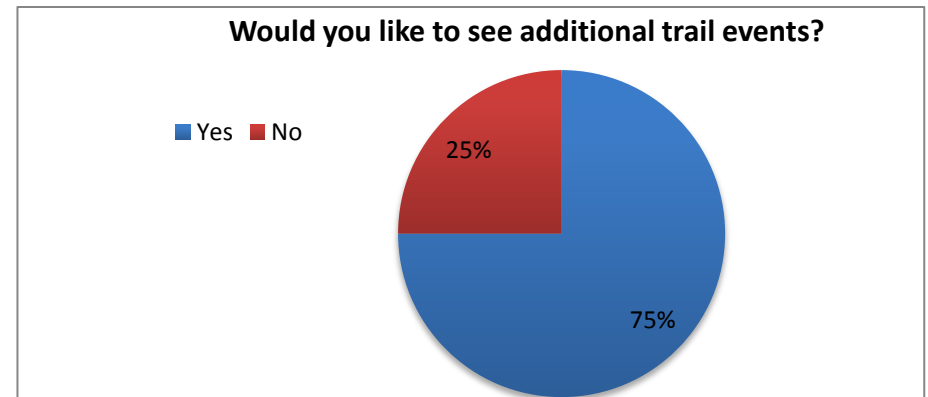
Answer Options	Response Percent	Response Count
Yes	75.0%	39
No	19.2%	10
Maybe	5.8%	3
<i>answered question</i>		52
<i>skipped question</i>		3

Would you be more likely to purchase goods and/or services from local stores/vendors during your trail visit if you had coupons for these services?



According to survey results, 75% would be more likely to purchase goods or services during their trail visit if coupons were offered, while 6% indicated "maybe."

Question 19: Would you like to see additional trail events?		
Answer Options	Response Percent	Response Count
Yes	75.0%	36
No	25.0%	12
<i>answered question</i>		48
<i>skipped question</i>		7

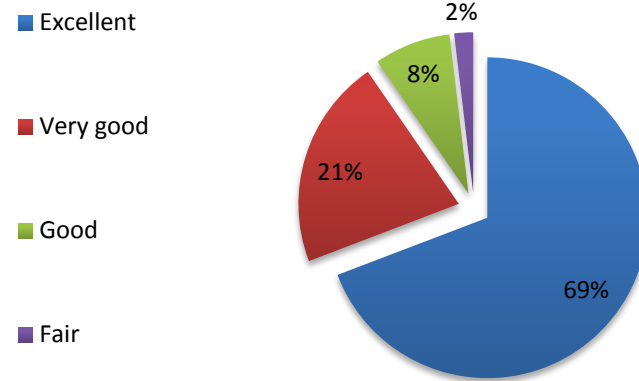


While 75% of respondents would like to see additional trail events, 25% responded no. There were no additional comments made as to the nature of events or explanation of negative responses.

Question 20: How do you rate your overall Orange County trail experiences?

Answer Options	Response Percent	Response Count
Excellent	69.2%	36
Very good	21.2%	11
Good	7.7%	4
Fair	1.9%	1
Poor	0.0%	0
<i>answered question</i>		52
<i>skipped question</i>		3

How do you rate your overall Orange County Trail experiences?



Almost 70% of respondents indicated an “Excellent” trail experience, followed by the response of “Very Good” at 21%.

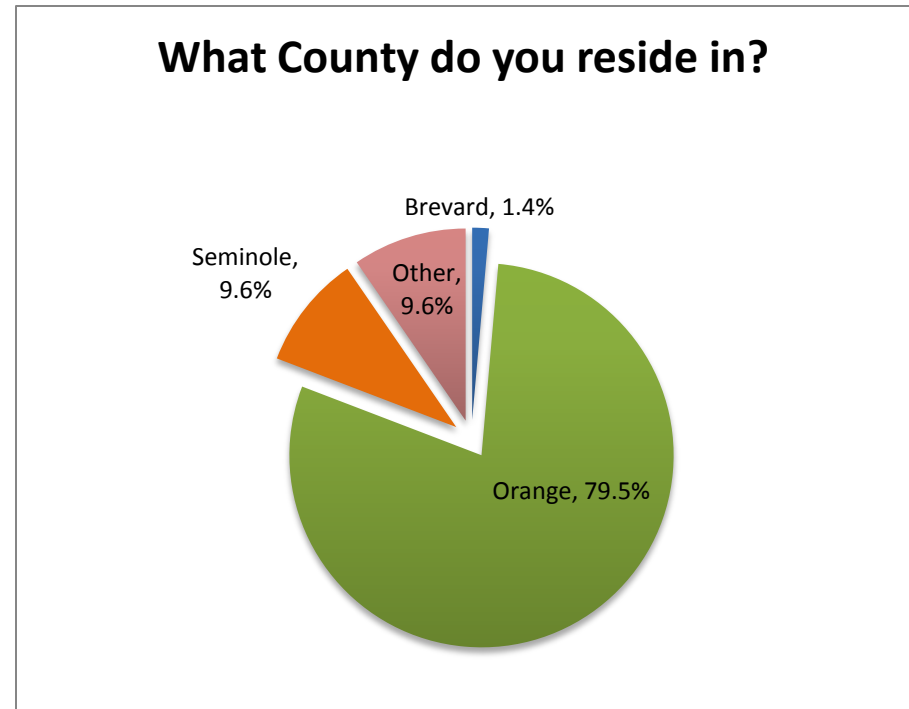
Comments from Cady Way surveys:

- Generally spend \$18-20 on Cady Way in Baldwin Park on ice cream. Didn't spend today because went in opposite direction. Last weekend spent \$24 on West Orange Trail.
- Need more vendors along the trail.
- Keep the trail going. I love it! Post signs that display mileage to a specific major intersection.
- No restroom at Chickasaw. Need more facilities. Location Map.
- Take Cady Way to Baldwin Park to buy ice cream.
- We would like to see more continuity between trails or at least signs marking the way to continue.
- We use the Cady Way Trail for school transportation. Orange County Cady Way should have mobile vendors on the trails selling drinks and maybe some food instead of having to leave the trail.
- The Trail is Great!
- Really enjoy the trail. Wish it was connected to go around the city to access it anywhere. Love it!
- This is my first trip and I thoroughly enjoyed it. I will definitely be back.
- Stop! The bicyclist on this Trail! I am sorry but it is difficult to express my dismay!! The cyclist using this path are arrogant, self-serving and act as though we runners are un-important! And almost run us over! You must separate we runners/walkers from them!!
- The bicycle people need to learn etiquette around pedestrians. It would be helpful if there were some small signs that read "alert approach speak:"ring" your bell, Slow down for pedestrians, watch for children, be courteous. Bicycle etiquette should be taught in school much like drivers of vehicles should be too.
- Beautiful Trail.
- Thank you for excellent upkeep of the trail. Maintenance workers are always courteous & stop machinery as cyclists pass by.
- Keep up the great work!
- The addition of recycling containers along the trail would be a value added feature!
- More rest rooms.
- More rest rooms on the trail.
- I love the Cady Way.
- Bike Trails are good. Keep and expand them.
- Great Trail!
- Cleaner trail.

Little Econ Greenway

From October through November, 73 physical, face-to-face surveys were conducted along the Little Econ Greenway. The following section addresses each question on the survey and analyzes the results.

Question 1: What County do you reside in?		
Answer Options	Response Percent	Response Count
Brevard	1.4%	1
Lake	0.0%	0
Orange	79.5%	58
Osceola	0.0%	0
Seminole	9.6%	7
Volusia	0.0%	0
Polk	0.0%	0
Other	9.6%	7
<i>answered question</i>		73
<i>skipped question</i>		0

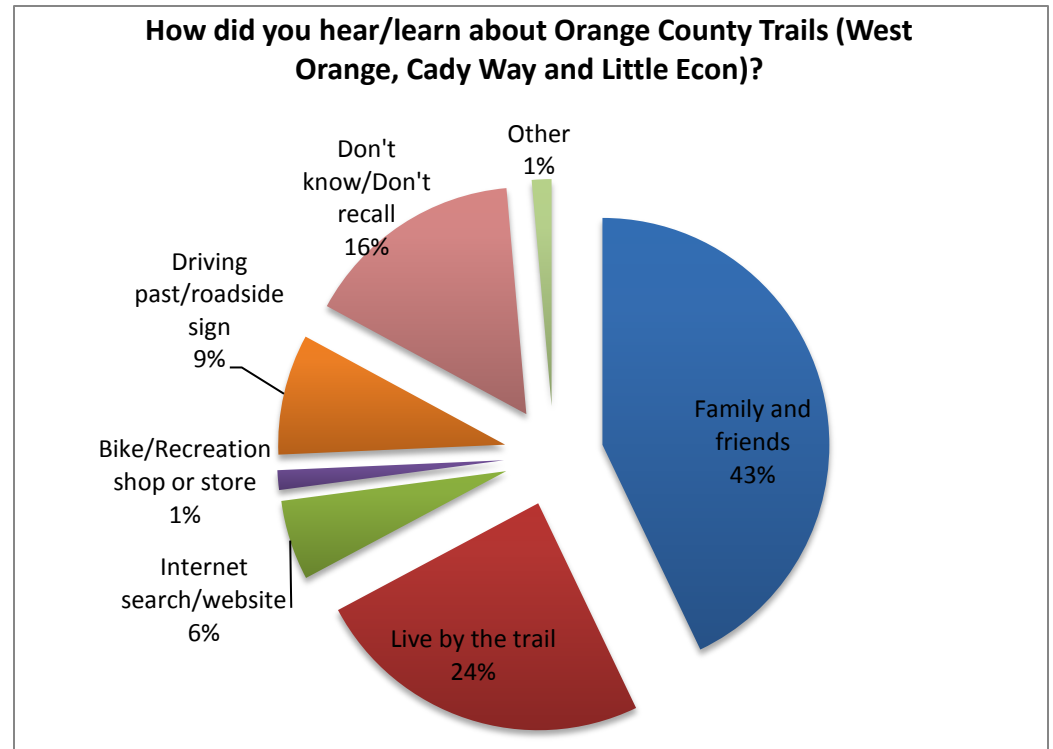


Almost 80% of those surveyed reside in Orange County, however, 20% indicated they reside in Seminole County or outside the region, including Cooke County, IL; Atlanta, GA; Arizona; Flagler County, FL. Two of those interviewed traveled to the Little Econ from Brevard County.

Question 2: Enter your zip code of your residence. Zip codes were analyzed to determine trail proximity to user residents. See maps on pages 19- 20.

Question 3: How did you hear/learn about Orange County Trails (West Orange, Cady Way and Little Econ)?

Answer Options	Response Percent	Response Count
Family and friends	42.9%	30
Live by the trail	24.3%	17
Internet search/website	5.7%	4
Bike/Recreation shop or store	1.4%	1
Newspaper	0.0%	0
Driving past/roadside sign	8.6%	6
Magazine	0.0%	0
Don't know/Don't recall	15.7%	11
Other	1.4%	1
<i>answered question</i>		70
<i>skipped question</i>		3

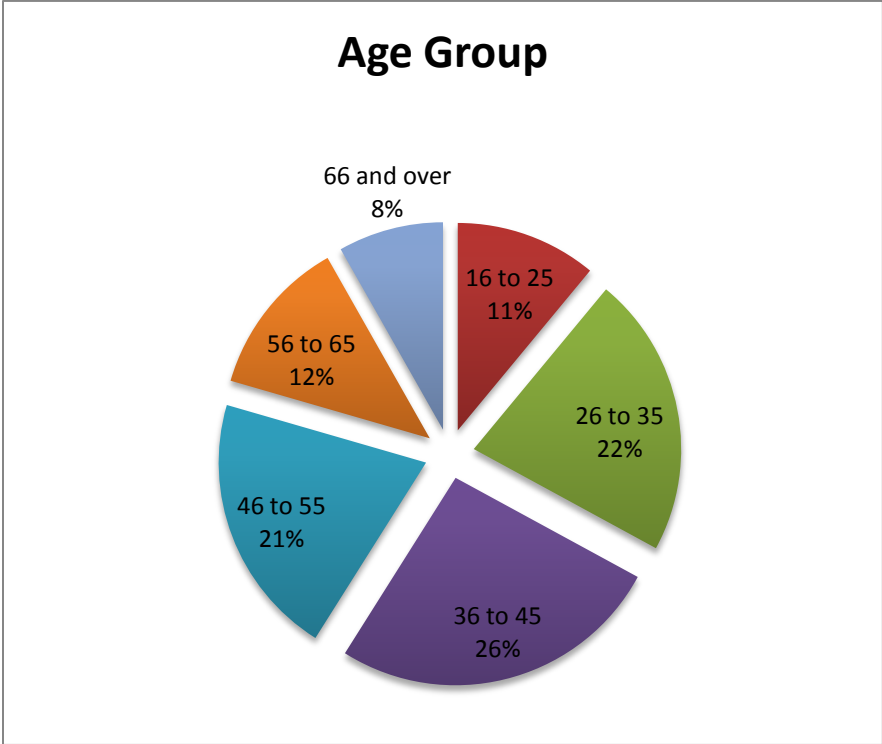


The majority of respondents (43%) learned about the Orange County Trail system by word-of-mouth, while 24% utilize the trail because they live nearby. One respondent indicated they learned about the Little Econ from the YMCA located in Blanchard Park. Only 6% learned about the Trail system through internet searches and 8.6% by way of driving in the area.

Question 4: Please check your age group.

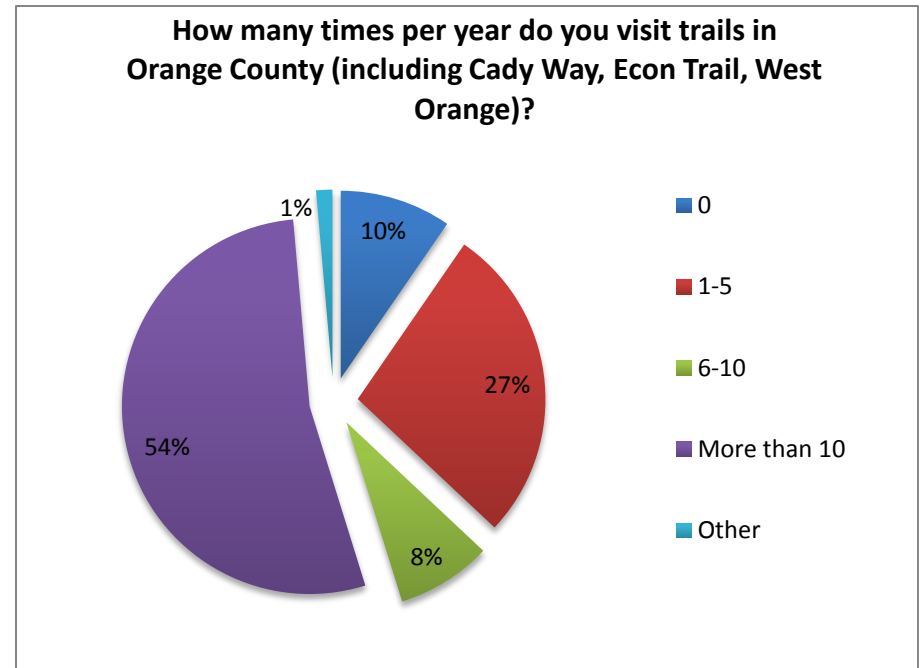
Answer Options	Response Percent	Response Count
15 years old and under	0.0%	0
16 to 25	11.0%	8
26 to 35	21.9%	16
36 to 45	26.0%	19
46 to 55	20.5%	15
56 to 65	12.3%	9
66 and over	8.2%	6
<i>answered question</i>		73
<i>skipped question</i>		0

The largest age group surveyed on the Little Econ Greenway were ages 36 to 45 (26%), followed by ages 26 to 35 (21%). No respondents indicated an age of 15 years or under.



Question 5: How many times per year do you visit trails in Orange County (including Cady Way, Econ Trail, West Orange)?

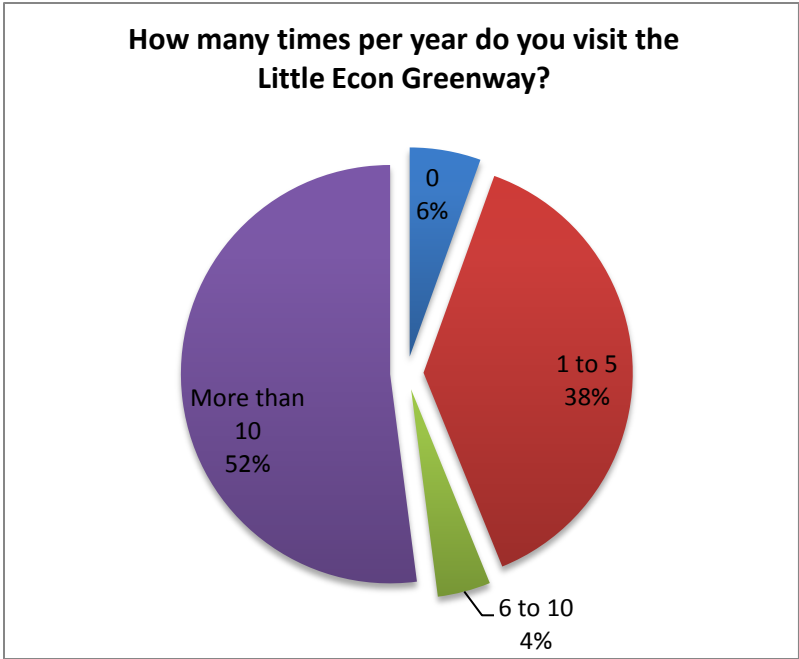
Answer Options	Response Percent	Response Count
0	9.6%	7
1-5	27.4%	20
6-10	8.2%	6
More than 10	53.4%	39
Other	1.4%	1
<i>answered question</i>		73
<i>skipped question</i>		0



Over 53% of those surveyed use the Orange County Trail system more than 10 times per year, followed by 27% visiting the trails 1-5 times per year. Some respondents indicated they visit the trails “every day” and some noted “5-6 times per week.”

Question 6: How many times per year do you visit the Little Econ Greenway?

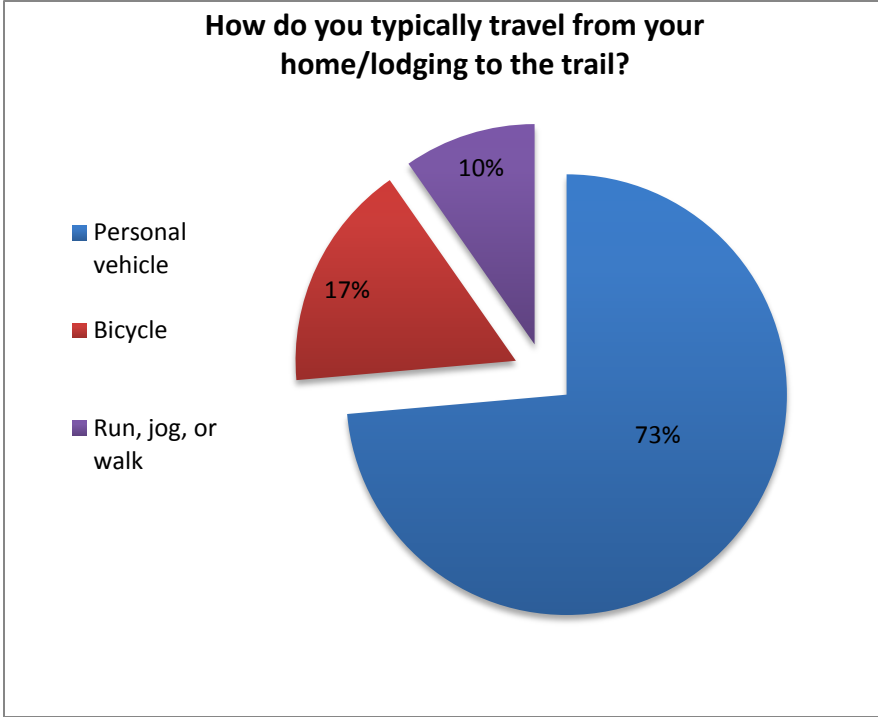
Answer Options	Response Percent	Response Count
0	5.5%	4
1 to 5	38.4%	28
6 to 10	4.1%	3
More than 10	52.1%	38
<i>answered question</i>		73
<i>skipped question</i>		0



When asked the number of trail visits per year, specifically for the Little Econ Greenway, the response of “more than 10” was almost the same as for the Orange County Trail system in question 5 (52%). The number visiting the Little Econ Greenway as many as 1-5 times per year jumped to 38%, while those visiting 6 to 10 times per year decreased to 4%.

Question 8: How do you typically travel from your home/lodging to the trail?

Answer Options	Response Percent	Response Count
Personal vehicle	73.6%	53
Bicycle	16.7%	12
Transit (LYNX, carpool)	0.0%	0
Run, jog, or walk	9.7%	7
Other	0.0%	0
<i>answered question</i>		72
<i>skipped question</i>		1



Blanchard Park was noted as the trail visitor’s place of entry to the trail by 45 out of 73 respondents. Other points of entry included Dean Road, Goldenrod and places of residence. Approximately 74% of those surveyed used a personal vehicle to get to the Little Econ Greenway, while 17% used their bicycles, reflecting the lowest number for bicycling of all three trails.

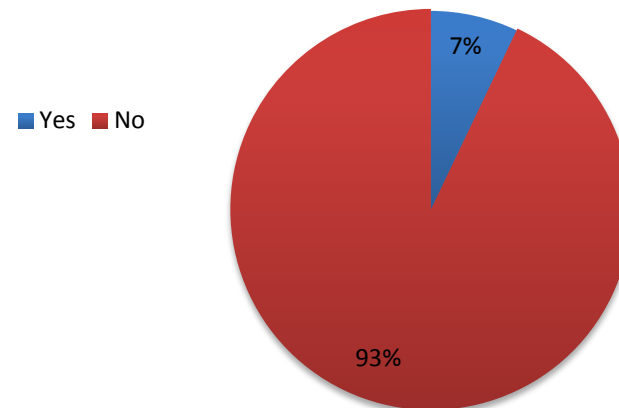
Question 9: In conjunction with your trip to the trail today, will you/did you stay overnight?

Answer Options	Response Percent	Response Count
Yes	7.1%	5
No	92.9%	65
<i>answered question</i>		70
<i>skipped question</i>		3

Question 10: If you answered yes to the previous question, what type of accommodation did you / will you use?

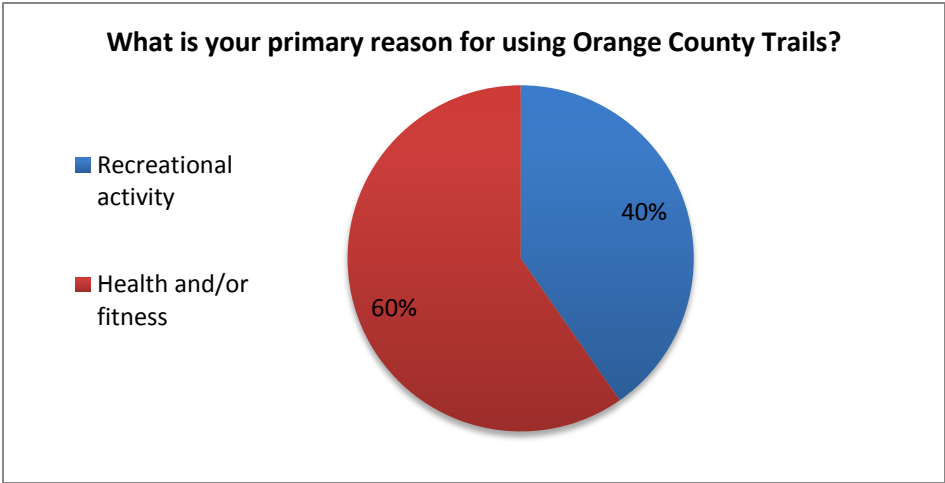
Answer Options	Response Percent	Response Count
Campground	0.0%	0
Motel/Hotel/Bed and Breakfast	0.0%	0
Friend or relatives home	100.0%	5
Not Specified	0.0%	0
<i>answered question</i>		5
<i>skipped question</i>		68

In conjunction with your trip to the trail today, will you/did you stay overnight?



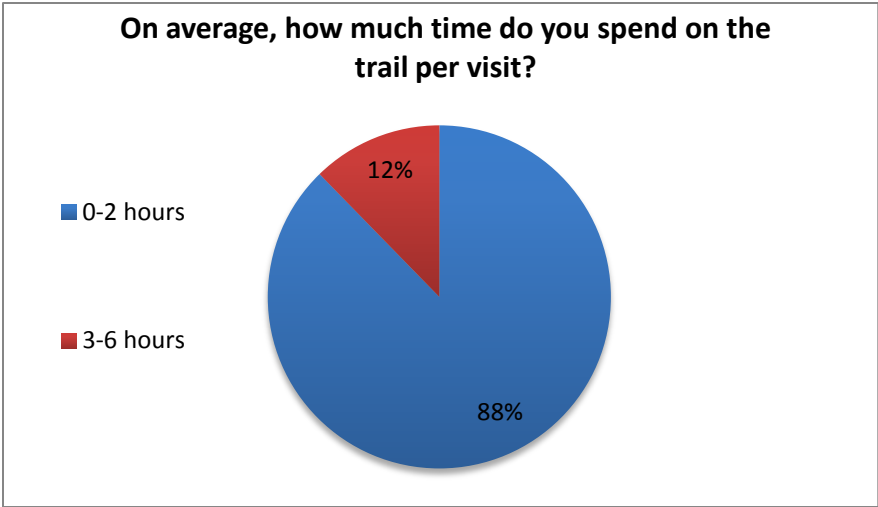
7% noted that they stayed at a friend's or relative's home in conjunction with their trip to the trail. No other lodging facilities were indicated.

Question 11: What is your primary reason for using Orange County trails?		
Answer Options	Response Percent	Response Count
Recreational activity	40.3%	29
Health and/or fitness	59.7%	43
Transportation	0.0%	0
<i>answered question</i>		72
<i>skipped question</i>		1



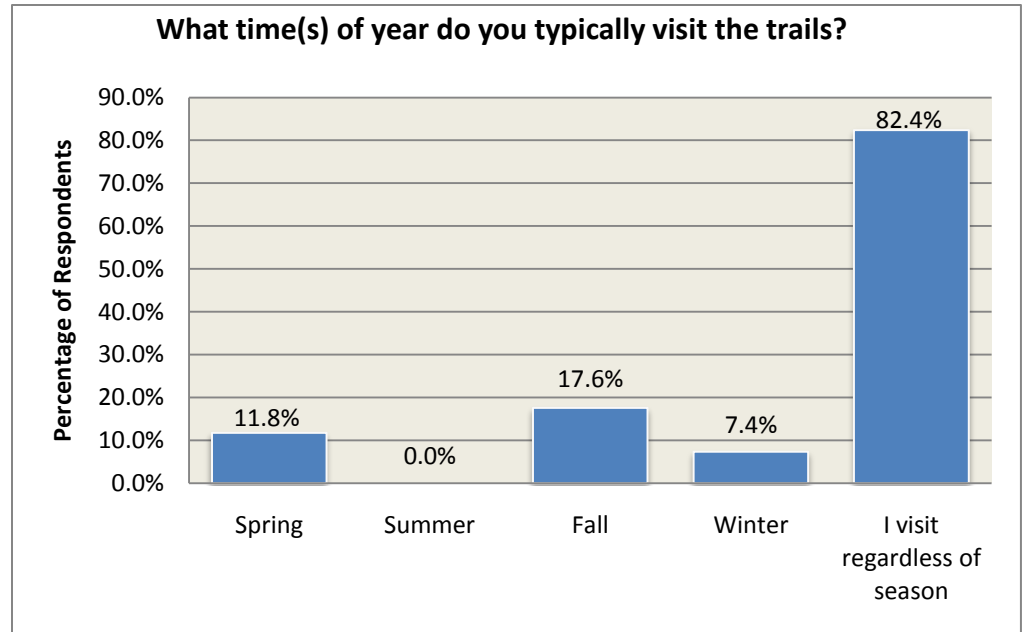
Health and/or fitness were chosen by 60% of respondents as their primary purpose for using the trail. Recreation was chosen by the remaining respondents, with no respondents indicating transportation. However, it was noted during interviews that students at the University of Central Florida use the trail for transportation purposes during the week.

Question 12: On average, how much time do you spend on the trail per visit?		
Answer Options	Response Percent	Response Count
0-2 hours	87.7%	64
3-6 hours	12.3%	9
More than 1 day	0.0%	0
<i>answered question</i>		73
<i>skipped question</i>		0



The majority of respondents (87.7%) spend, on average, 0-2 hours on the Trail per visit, while 12% indicated they spend more than 6 hours on the Trail.

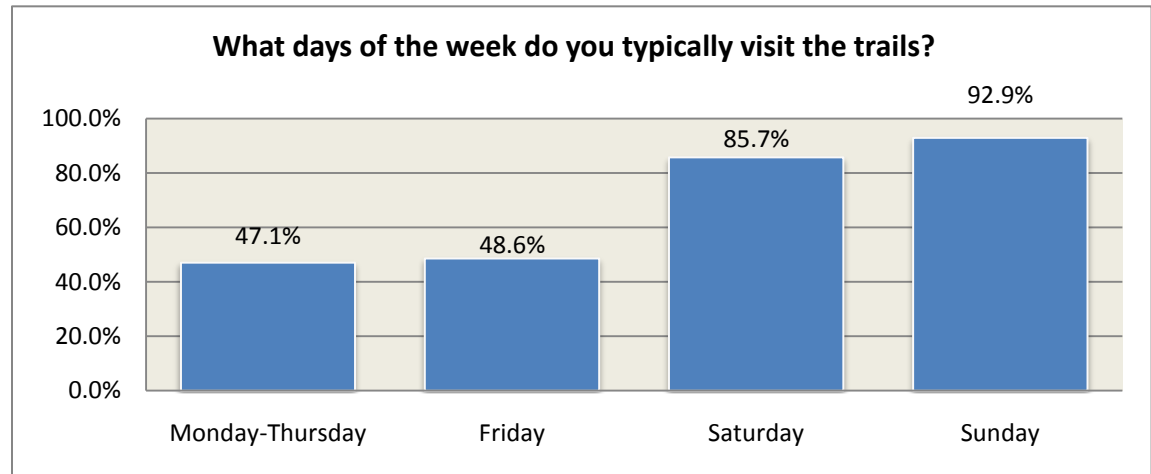
Question 13: What time(s) of year do you typically visit the trails?		
Answer Options	Response Percent	Response Count
Spring	11.8%	8
Summer	0.0%	0
Fall	17.6%	12
Winter	7.4%	5
I visit regardless of season	82.4%	56
<i>answered question</i>		68
<i>skipped question</i>		5



Unlike the survey responses from the Cady Way and West Orange Trails, no respondents indicated summer as time when they typically visit the trail. However, 82% noted that they visit regardless of season, which would include summer. Fall was the next most popular season, with almost 18% typically using the trail during this time.

Question 14: What days of the week do you typically visit the trails?

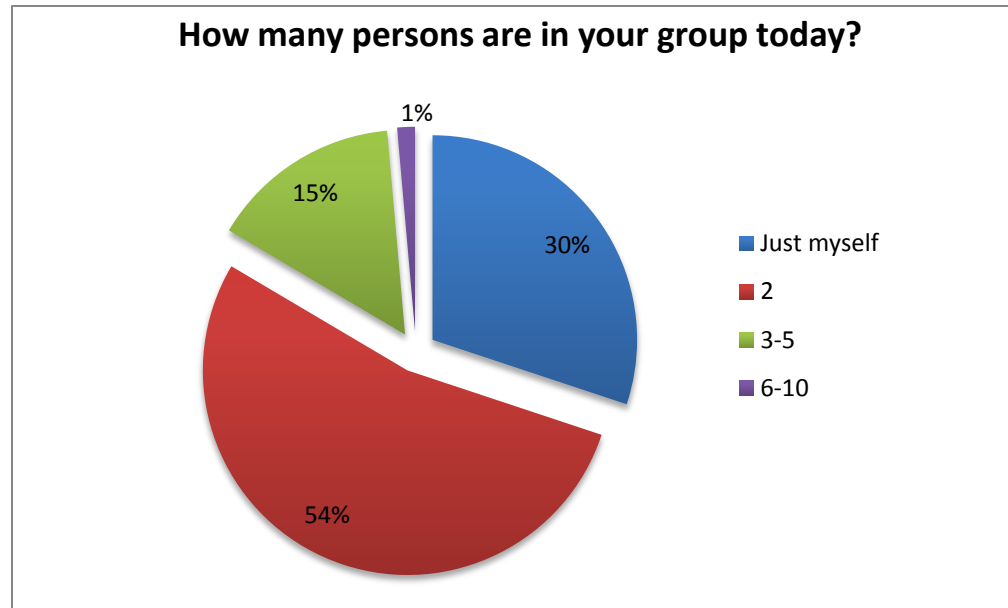
Answer Options	Response Percent	Response Count
Monday-Thursday	47.1%	33
Friday	48.6%	34
Saturday	85.7%	60
Sunday	92.9%	65
<i>answered question</i>		70
<i>skipped question</i>		3



Saturday and Sunday were ranked as the days of highest use. However, since the total number of responses exceeds the number of individuals surveyed, it is evident that many trail users submitted multiple responses to indicate that they may visit the trail on almost any given day. Percentages total over 100% due to some respondents noting each choice as a typical day to visit the trail due to their everyday use of the Little Econ Greenway.

Question 15: How many persons are in your group today?

Answer Options	Response Percent	Response Count
Just myself	30.1%	22
2	53.4%	39
3-5	15.1%	11
6-10	1.4%	1
More than 10	0.0%	0
<i>answered question</i>		73
<i>skipped question</i>		0

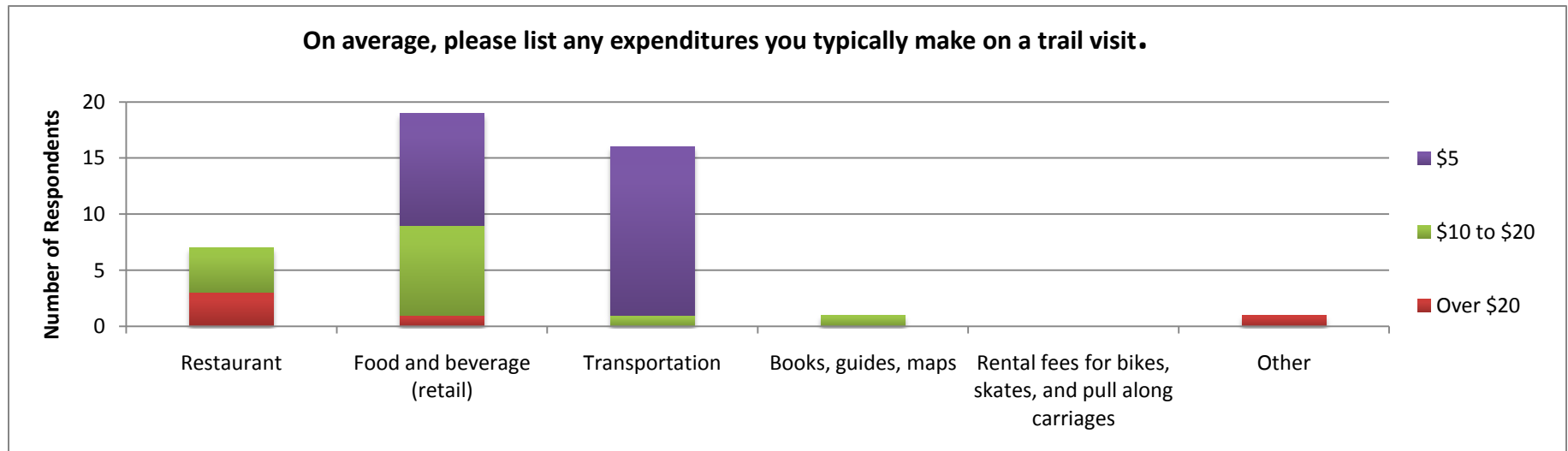


53% of those surveyed indicated that they had visited the Little Econ Trail that day in groups of two. 30% indicated they were visiting the Trail alone, while small groups of 3-5 were noted in only 15% of those surveyed.

Question 16: On average, please list any expenditures you typically make on a trail visit.

Answer Options	\$0	\$5	\$10 to \$20	Over \$20	Response Count	This was spent in Orange County
Restaurant	54	0	4	3	61	6
Food and beverage (retail)	43	10	8	1	62	7
Transportation	46	15	1	0	62	9
Books, guides, maps	53	0	1	0	54	1
Rental fees for bikes, skates, and pull along carriages	54	0	0	0	54	0
Other	9	0	0	1	10	1
<i>answered question</i>					73	
<i>skipped question</i>					0	

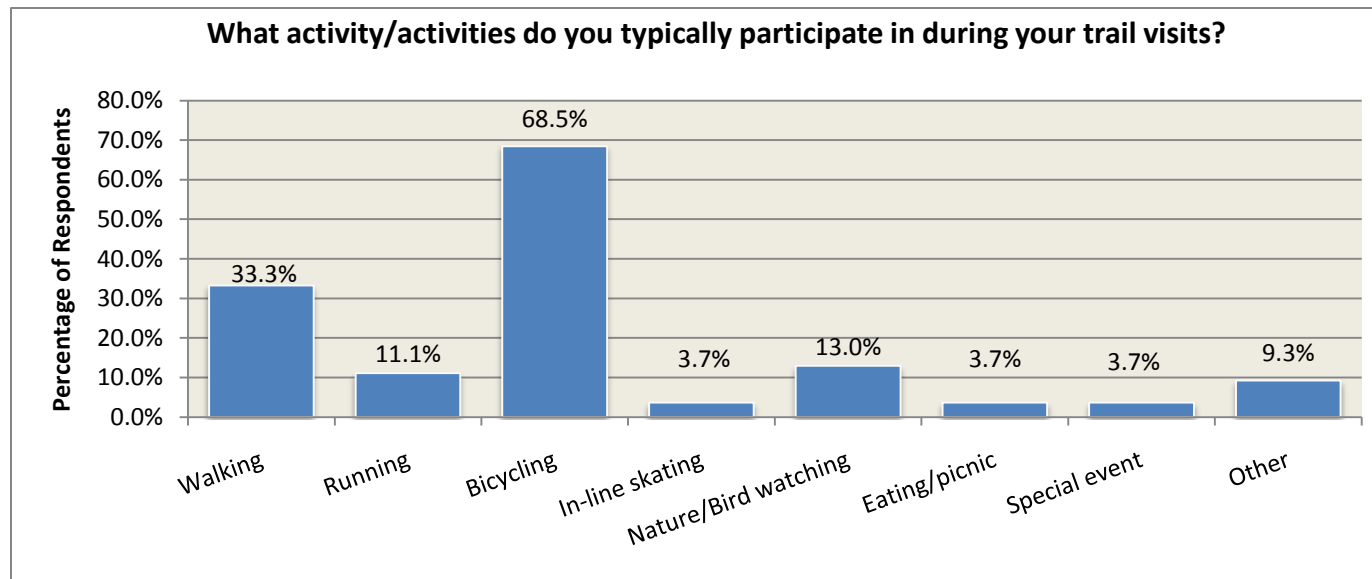
The largest number of respondents (15) indicated that they spent approximately \$5 on transportation to/from the Trail. This would include gas and tolls, taxi or transit. The retail food and beverage expenditures made up the largest response category of expenditures by trail users, as 19 respondents said they typically spend money on these goods during a visit to the trail. However, visits to restaurants are typically more costly than retail food and beverage purchases, which may account for the fact that the greatest number of respondents (3) who indicated spending over \$20 are in the restaurant category. Survey comments included suggestions that mobile vendors be located along the Trail for the convenient purchase of beverages or snacks. In order to access stores, restaurants and retail areas along the Little Econ Greenway, trail users must exit the Trail, which for some, is undesirable when distance, accessibility and safety are issues.



Question 17: What activity/activities do you typically participate in during your trail visits.

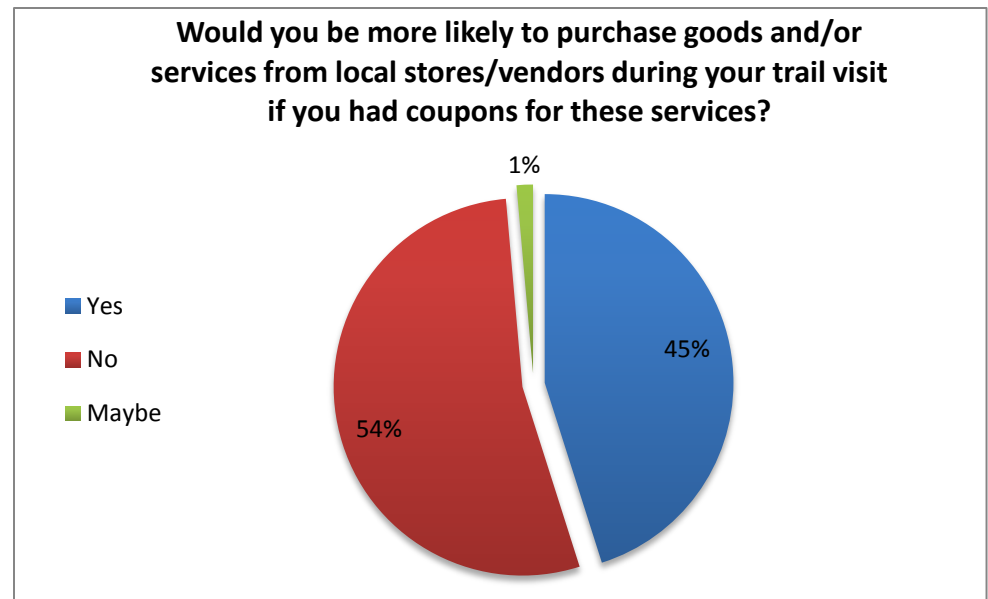
Answer Options	Response Percent	Response Count
Walking	47.9%	35
Running	21.9%	16
Bicycling	49.3%	36
In-line skating	1.4%	1
Nature/Bird watching	15.1%	11
Eating/picnic	2.7%	2
Special event	2.7%	2
Other	8.2%	6
<i>answered question</i>		73
<i>skipped question</i>		0

Bicycling and walking were rated as the most popular activities on the Trail, followed by running at 21%. Percentages total over 100% since some respondents noted participating in multiple activities during a single trail visit. Other activities mentioned included fishing, park, playground, tennis and basketball.



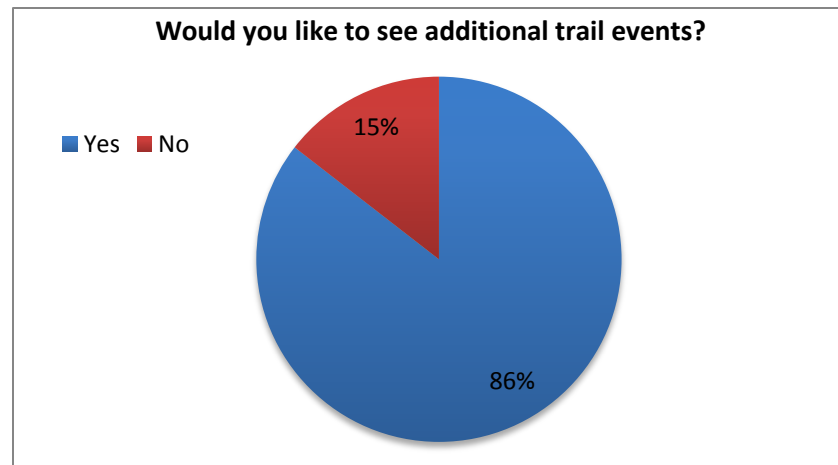
Question 18: Would you be more likely to purchase goods and/or services from local stores/vendors during your trail visit if you had coupons for these services?

Answer Options	Response Percent	Response Count
Yes	45.1%	32
No	53.5%	38
Maybe	1.4%	1
<i>answered question</i>		71
<i>skipped question</i>		2



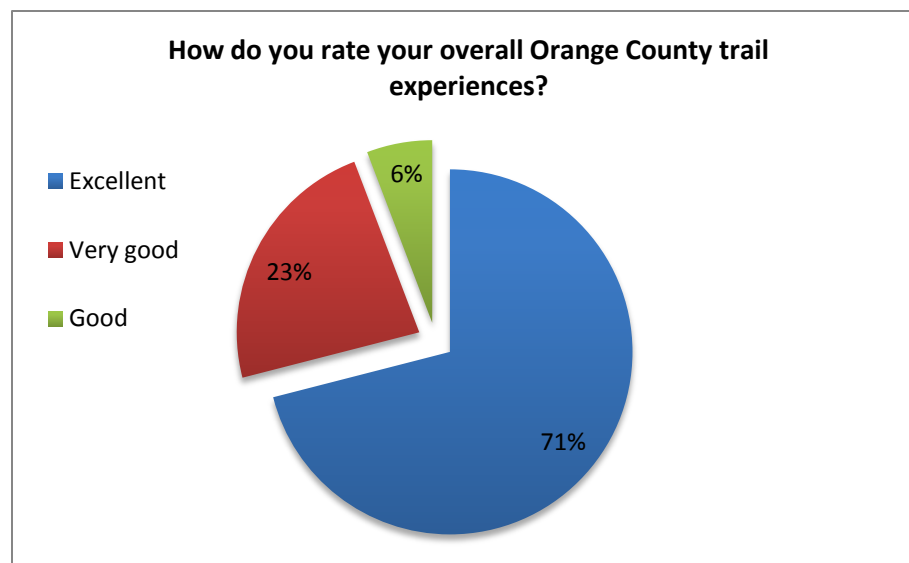
Over 53% of survey respondents from along the Little Econ Trail noted that coupons would not encourage them to purchase goods and services from local vendors during their visit. This is not surprising since almost 25% of those using this Trail live nearby and would not likely have need of vendor services. Also, since the Little Econ is a very nature-oriented trail, many users may not want to see vendors directly on the Trail.

Question 19: Would you like to see additional trail events?		
Answer Options	Response Percent	Response Count
Yes	85.5%	59
No	14.5%	10
<i>answered question</i>		69
<i>skipped question</i>		4



The majority of survey respondents (85%) indicated they would like to see some sort of trail event along the Little Econ Greenway. Survey comments recommended that trail events be in keeping with the environment, nature based orientation of the trail.

Question 20: How do you rate your overall Orange County trail experiences?		
Answer Options	Response Percent	Response Count
Excellent	71.0%	49
Very good	23.2%	16
Good	5.8%	4
Fair	0.0%	0
Poor	0.0%	0
<i>answered question</i>		69
<i>skipped question</i>		4



All respondents rated their overall Orange County Trail experience as either “Excellent,” “Very good,” or “Good,” with over 70% rating the experience as “Excellent.”

Additional comments from the surveys:

- Like Bulletin Board/Kiosk. Very informative. (Would) like port-a-potty throughout park and trail.
- Cady Way Trail. Construction on SR 50 is a deterrent. Live in Baldwin Park so frequent Cady Way.
- More benches.
- Little Econ is my favorite trail.
- Would like lights for security and emergency numbers along the trail. Beautiful trail.
- Sand piles up/ need more than blowers.
- Would like canoe / boat rentals.
- Add canoe rentals
- More bathrooms.
- Connect trail to Cady Way.



April 2011