

# Ontario Trail User Survey 2014



ONTARIO MINISTRY OF TOURISM, CULTURE AND SPORT



## About this Document

This document presents the results from the 2014 Ontario trail users survey conducted by SPR Associates Inc. on behalf of the Ministry of Tourism, Culture and Sport.

The survey is presented in two sections. 'Section One' focuses on the survey results of all trail user groups in Ontario and 'Section Two' demonstrates the specific benefits of Ontario's hiking trails .

The objectives of the Ontario

trail users survey were:

- To conduct a comprehensive survey of all types of trail users (e.g., hikers, snowmobilers, cyclists, etc.);
- Assess the experience of trail users and the impact of using trails; and
- Test the ability of a comprehensive survey design to generate expenditure estimates and insights.

The survey also examined how much users spent on

hiking and related expenditures for the purpose of calculating the economic impacts of trails for one specific group -- hikers.

The Ontario trail users survey was conducted in December 2014 by requesting trail organizations such as hiking clubs, snowmobile clubs, ATV clubs, and equestrian organizations to invite their members to complete an on-line survey. Survey invitations were also sent to randomly selected residents in various regions of the province to

capture the perspective of non-trail users.

## Section One: Survey Results

The survey got over 5,000 responses. Of these over 4,600 responses were received from all types of trail users. These included - hikers (over 1,800), snowmobilers (over 900), mountain bikers (over 400), off-road motorcyclists (over 300) cyclists (over 300), 4x4 users (over 300), ATVers (over 200), horseback riders (over 200), and relatively fewer snowshoers, cross-country skiers, canoeists, and kayakers (together totalling upto over 200). Data was collected from trail users across the province.

### Profile of Trail Users in Ontario

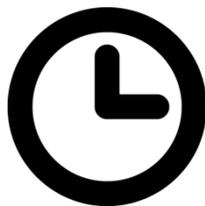
The survey data indicates that trail users are generally older males (52 per cent of the trail users are over age 45 and 62 per cent of them are male), relative to the overall Ontario population. Trail users were also found to be typically from a higher income group; 36 per cent of trail users reported an annual income of over

\$100,000.

Approximately 44% of trail users had at least a University certificate or degree.



### Overview of Trail User Survey Findings



#### Length of time using trails:

Most trail users indicated that they've been using trails for 20 years. Only 2 per cent reported that they have been using trails for less than one year, implying that there is a dedicated population of long-term trail users.



**Planning:** The majority of both day and overnight trail outings were planned and/or organized by trail users themselves, without the assistance from others.

**Day trail outings:** 85 per cent of trail users indicated that they had used a trail for a day outing in 2014. Hiking/walking was the most typical use of trails (32 per cent) reported. Other users reported many types of trail activity; for example, 14 per cent indicated that snowmobiling was their typical day outing on trails. Day trail outings were rated very highly in terms of overall satisfaction, with 82 per cent indicating that they were very satisfied with their trail experience. Day trail use was usually a group activity, with only 12 per cent of respondents indicating that they travelled alone, and over 88 per cent indicating that they usually travelled with at least one other person. According to the survey findings, a typical day trail outing lasted 4.5 hours on average. Most of the

day time traveling occurred in within the vicinity of the trail users dwellings.



**Seasonality of day trail outings:** The peak time of year that trails were used for day outings was during the spring (April-June) and the fall (September-November) periods.



**Transportation to trails:** The majority of trail users (75 per cent) indicated that they used an automobile to get to the beginning of the trail for day outings, with less than 25 per cent reporting that they walked or bicycled to reach the start of the trail -- the average distance travelled was 46.4 kilometres.

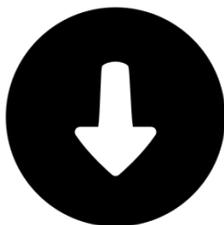


**Overnight trail outings:**

Among those using trails in 2014, 65 per cent indicated that they had not made any overnight trail trips in 2014. As with day outings, hiking/walking was the typical activity during overnight trail outings (26 per cent), followed closely by snowmobiling at 21 per cent. Similar to day trail outings, nearly 75 per cent used an automobile to reach the start of the trail and the average overnight trail outing lasted 3 nights. The vast majority of overnights (86 per cent) indicated that they were very satisfied with their typical overnight trail outings.



**Seasonality of overnight trail outings:** Overnight trail outings were most often undertaken during the months of April (38 per cent), June (40 per cent) and February (34 per cent).



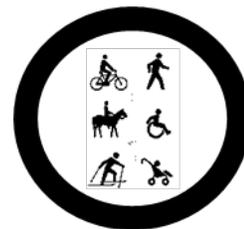
**Activities enjoyed and the**

**importance of trails:**

Appreciating nature was rated by majority 76.4 per cent) of respondents as being *Very Important* in terms of their use of trails; this was followed by exercise (70.9 per cent), and by being able to spend time with family/friends (68.7 per cent). Respondents also reaffirmed the importance of having Ontario and its partners (i.e., municipalities, conservation areas, trail organizations) invest in trails.



**Access to trails:** In terms of accessibility, more than 75 per cent of trail users indicated that the nearest trail to their home is convenient and easily accessible.



**Many trail users use more than one type of trail:**

Generally, trail users use trails in one way -- hiking, snowmobiling, etc. But many are multi-trail users, for

example, hikers may use snowmobiles in the winter. For some purposes of this survey, the nine trail-user types were divided into two groups: **non-motorized users** and **motorized users**.

**Views of non-users of trails:**

The survey also obtained information from about 400 non-users of trails. Non-users indicated a variety of reasons for not using trails. Such as, 28.0 per cent reported that they did not have enough information about available trails; 26 per cent reported there were no trails near their home; and 22 per cent reported that the lack of leisure time prevented trail use.

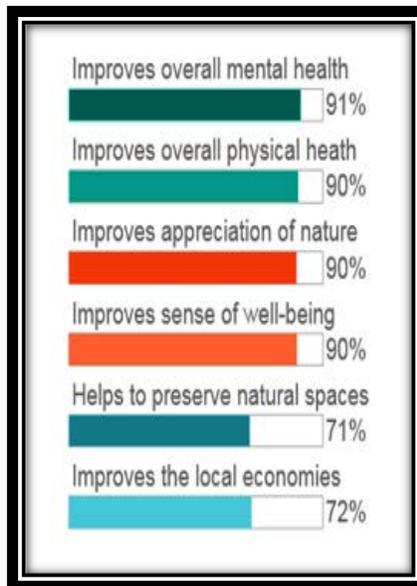
**Trail preferences of the non-users:**

If they were able to use trails, non-users mainly indicated they would be interested in hiking (51 per cent). Additional interests were noted in horseback riding (26 per cent), snowshoeing (18 per cent), mountain biking (18 per cent) and cross-country skiing (15 per cent).

These results suggest that there are significant untapped markets for trail users -- a finding supported by other aspects of this study including international research and trail contacts.

**Interest in volunteer work on trails:** About one-third of non-users expressed an interest in volunteer work on trails, suggesting there is an untapped pool of volunteers for trail organizations.

**Positive impact of using trails:** The majority of trail users in Ontario believe that there are some definite positive impacts of using trails. Over 90 per cent of trail users believe that trails have a positive impact on their physical and mental health.



**Activities Enjoyed During Trail Use**

**Main Activities:**



Trail users reported that exercise was a priority activity while

experiencing and enjoying trails. Exercise was the top rated (over 90 per cent) experience reported by hikers, and was also a top rated experience for cyclists, mountain bikers, snowshoers, cross-country skiers, canoeists, and kayakers. In comparison, motorized trail users tended to place a lower priority on trail use as a source of exercise, as seen in the results for snowmobilers, ATVers, and 4x4 users, who rated exercise 37 per cent, 43 per cent, and 30 per cent, respectively. An exception to this pattern was off-road motorcyclists; 82 per cent of whom rated exercise as a primary experience.



Appreciating nature was also a key activity reported by

hikers, and one rated highly by all trail user groups. Just over 90 per cent of hikers/walkers reported appreciating nature as a priority, an assessment closely mirrored by views of other non-motorized users (i.e., snowshoers, cross-country skiers, canoers, and kayakers). A smaller portion of motorized users (75 per cent) reported appreciation of nature as a key activity during trail use.



Spending time with family and friends was also rated as a main trail activity, followed closely by a sense of adventure. About 65 per cent of hikers and other non-motorized trail users reported these as key sources of enjoyment, with slightly higher ratings given to these activities by motorized trail users.



**Other Activities:**

Trail users in all groups reported a lower priority for appreciating wildlife. This was a priority for only about 30 per cent to 60 per cent of trail users. Simply getting away from home was similarly rated as a source of enjoyment of trails.



Only small percentages of respondents gave priority to experiences such as appreciating cultural heritage, geocaching, or alternative transportation (to school or work). Only very small percentages of most trail users gave priority to added experiences such as fishing, hunting, and shopping. An exception was slightly higher percentages indicating

enjoyment from fishing and hunting, among snowmobilers, and especially ATV, and 4x4 trail users.

Survey results regarding sources of enjoyment by trail users revealed a number of common themes, particularly exercise and enjoying nature -- uniting the views of all types of users, with unique features noted for some particular groups, such as ATVers and 4x4 users (greater attention to fishing and hunting). This was seen by the researchers as reflecting a variety of values shared by the different types of users.

## Section Two: Benefits of Ontario Hiking Trails

### Health Benefit

The survey also examined self-assessed health benefits of hiking. Most of the hikers reported that the impact of hiking on their health is *Excellent* (44.1 per cent) or *Very Good* (39.6 per cent). It was also found that the hikers who spent more time hiking enjoy better health. Of the hikers who spent 141-220 hours hiking a year, 72.8 per cent of them reported better

health compared to those who hiked lesser.

Overall health status	Hikers
Excellent	44.1%
Very good	39.6%
Good	13.2%
Fair	2.6%
Poor	0.4%

Self-assessment of the impact of hiking on well-being was also surveyed and it showed similar results to the self-

Overall well-being	Hikers
Excellent	39.9%
Very good	45.3%
Good	12.8%
Fair	1.7%
Poor	0.3%

assessed health status. Most of the hikers reported that the impact of hiking on their overall well-being is *Excellent* (39.9 per cent) or *Very Good*

(45.3 per cent).



To assess the economic benefits of hiking, the study applied Ontario's Tourism Regional Economic Impact Model (TREIM), an economic model which assesses impacts on factors such as Gross Domestic Product (GDP), jobs, labour income, and taxes. The primary inputs to the model are consumer expenditures and investment in hiking.

**Spending on Hiking:** The study indicated that in 2014, Ontario hikers spent:

- \$957 million on day outing hiking expenditures of all types, including travel; and
- \$695 million on overnight outing hiking expenditures;
- For a total expenditure of \$1.652 billion on supplies and services, plus another \$252 million on consumer durables such as hiking boots and camping equipment.

The study ran the TREIM model with the assumption of \$1.652 billion in hiker

expenditures and found the following results.

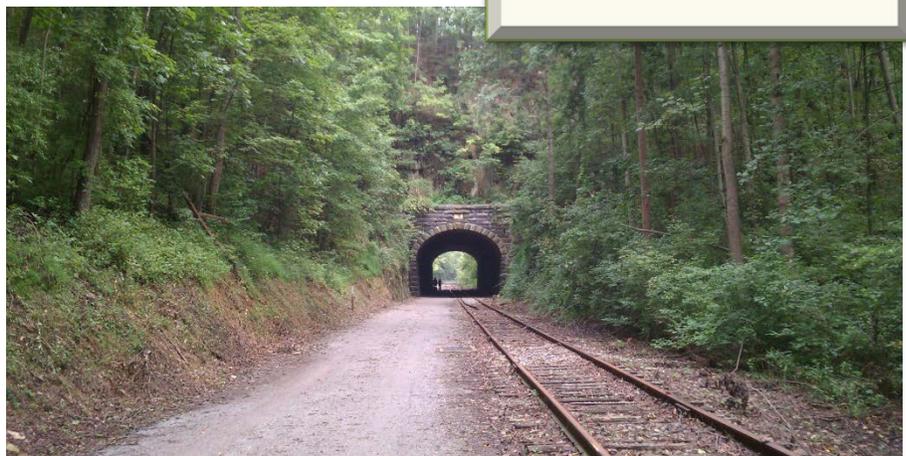
**According to TREIM, in 2014, hiking expenditures by Ontarians led to benefits of:**

- \$559 million to the Ontario GDP; and
- \$806 million in labor income.

**or a total economic benefit to Ontario of \$1.365 billion,** plus \$259 million in total provincial taxes.

As well, the Ministry's TREIM model estimated that hiking created 18,494 jobs across the overall Ontario economy.

Survey Conducted by the SPR Associates Inc.  
Published by the Ministry of Tourism, Culture and Sport  
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*"Trails are a wonderful asset, it's important to recognize their value to human health and well-being and to appreciation of nature. How many more healthy people would there be and how much money could we save if more people spent time enjoying trails! Many people may not realize that trails are everywhere - in local parks and conservation areas as well as trails such as the Bruce Trail."*

*- A regular hiker on the Bruce Trail*

*"I feel trails form an important part of the quality of life in Ontario. I feel there should be more education and a stronger promotion of the value of the use of trails within the school system. Children need to spend more time out of doors and trails provide the opportunity for this to happen if they are promoted."*

*- A trail user from Central Ontario*