



Economic Impact Analysis of Seminole County Trails



The East Central Florida Regional Planning Council produced this report as the result of economic and behavioral analysis conducted for the Florida Division of Recreation and Parks Office of Greenways and Trails and Seminole County. The Economic Impact Analysis of Seminole 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, Seminole County, and 2011 Kodak American Greenways Award Program. The surveys and analysis took place in 2011 - 2012 and are reflective of the current economic situation. For more information concerning the study and analysis, contact:

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Purpose

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

In 2010, three trails in Orange County were surveyed to analyze the economic impact of the Orange County trail system on the County. In addition, the West Orange Trail survey results were analyzed to determine the economic impact the trail had on downtown Winter Garden. Expanding upon this study, a similar analysis was conducted in Seminole County. It is important to note that the trail systems in both Orange County and Seminole County connect, yet are vastly different.

The East Central Florida Regional Planning Council (ECFRPC) analyzed the economic impact of the Seminole County Trail System on the County's local economy by obtaining trail user characteristics and spending habits through trail user surveys. Other pertinent information was collected through the trail user surveys with hope to assist Seminole County in the enhancement of their marketing efforts, trail facility development and special events.

The Seminole County Trail study was funded through partnership with the Florida Office of Greenways and Trails, Florida Greenway and Trails Foundation, National Park Service, Seminole County and the East Central Florida Regional Planning Council (ECFRPC). In addition, the ECFRPC received a grant from the Kodak American Greenways Awards, administered by The Conservation Fund. Out of 200 nationwide applicants, the ECFRPC was one of 21 award grantees (www.conservationfund.org).



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.

Seminole County Tourism Agency extensively promotes Seminole as "The Natural Choice" through their marketing, eco-tours and other nature and trail oriented programs.

www.visitseminole.com





Background

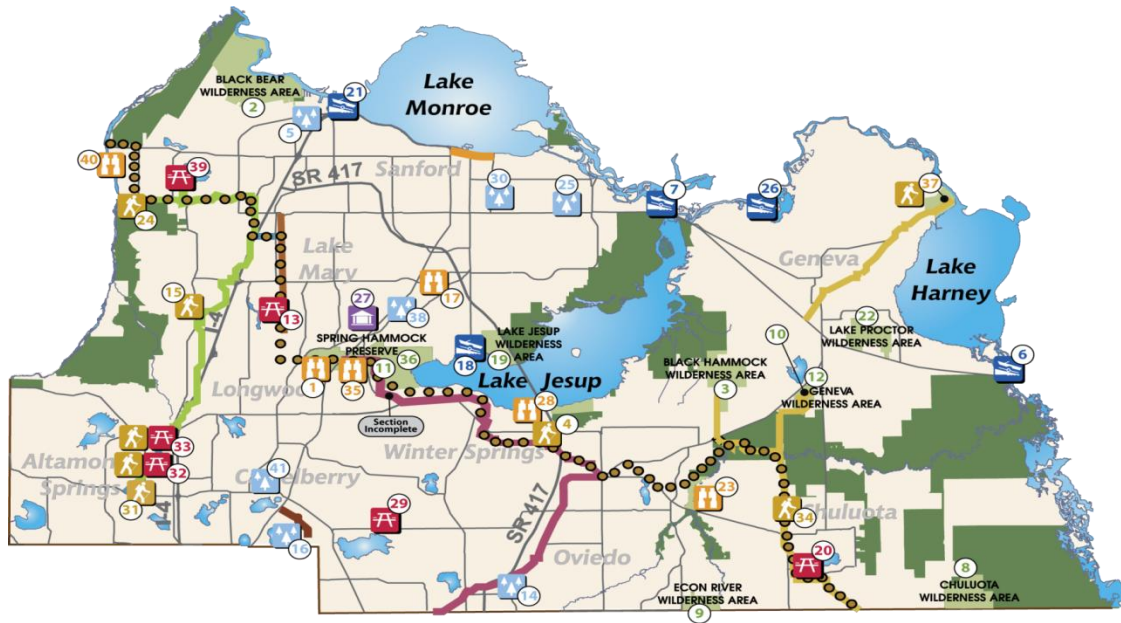
Seminole County is home to 60 miles of hiking and multi use trails, including the Florida National Scenic Trail (FNST). Seminole County’s extensive trail system includes the Seminole Wekiva and the Cross Seminole Trail which, together, traverse the entire County, connecting town centers to the high tech corridor in Lake Mary as well as to Orange County at the Cady Way Trail. These paved trails provide citizens with two major benefits: a choice of transportation modes that will navigate the entire county and secondly, a safe and convenient recreational opportunity.



The length, beauty and accommodations of the Florida National Scenic Trail (FNST), Seminole Wekiva, and Cross Seminole trails have earned the designation as Seminole County Showcase Trails. Seminole County has also been designated as a Florida Trail Gateway Community because of the County’s eco-tourism amenities geared towards recreation enthusiasts as well as the County’s embracement of the FNST. As a designated Florida Trail Gateway Community, the Florida Trail Association assists the County with nature-based tourism marketing and opportunities.

Nature-based recreation, as demonstrated by a 58% vote approval of a \$25 million bond referendum in November 2000, is a priority to Seminole County residents. The bond referendum provided \$20 million for the development of a network of urban and wilderness trails throughout the County and \$5 million for the acquisition of Natural Lands. The bond expanded the scope of the twenty year 1990 Natural Lands referendum that allowed the County to acquire approximately 6,600 acres of environmentally sensitive lands for preservation.

With this referendum, Seminole County is in the process of creating an interconnected system of urban trails and connections to schools, parks, shopping centers and neighborhoods. The bond money was also used to advance the construction of the Cross Seminole Trail, a 28-mile urban trail and complete the connection from this trail to the Seminole Wekiva Trail, a 14-mile urban trail located west of I-4. The County continues to expand the \$20 million set aside for trails by offering matching funds for federal grants.



Furthermore, a 20-mile network of wilderness trails was created including a section of the Florida National Scenic Trail, a 1,300-mile wilderness path running from the panhandle to the Everglades.



The residents' support and County's actions are clear indicators that the public wants a world class system of trails in their community. Seminole County is a leader in offering citizens a referendum primarily for trail construction. Their innovation and action has set a precedent for other local governments to follow.





Big Tree Park, donated to the County by Senator M.O. Overstreet and dedicated by President Calvin Coolidge in 1929, was home to "The Senator", a 3,500 year old Bald Cypress and "Lady Liberty", the Senator's companion tree. Unfortunately, in February of 2012, The Senator was burned beyond saving.



(Source: Seminole County)



The Cross Seminole Trail

The Cross Seminole Trail begins at the end of Orange County's Cady Way Trail at the intersection of Aloma Ave and Howell Branch Road in Winter Park. The trail is a planned 23-mile paved trail that heads north through the County and the Cities of Oviedo and Winter Springs to the I-4 Lake Mary Pedestrian Overpass where it connects to the Seminole Wekiva Trail. There is one section of the trail that is not completed. Portions of this trail are designated as sections of the Florida National Scenic Trail.

The Cross Seminole Trail offers access to a variety of recreational opportunities including bicycling, running, horseback riding and wildlife viewing as well as numerous parks and their amenities. Parks located along the trail include Big Tree Park, Greenwood Lakes Park and Soldier's Creek Park. The Spring Hammock Preserve offers a wildlife experience off the major trail. Five trailheads allow easy access to the trail and provide amenities from restrooms to playgrounds and sports fields to water fountains and concessions. The trailheads consist of the Black Hammock Trailhead, Soldiers Creek Park, Big Tree Park, Greenwood Lakes Park, and CST Rinehart/Lake Mary. Equestrian facilities are also located along the trail. The bridge crossing SR 434 in Winter Springs is equipped with tread made of recycled tires for horse crossing.

The Cross Seminole Trail runs through downtown Oviedo. Various restaurant establishments are located along or near the trail, in addition to various stores, churches, schools (Oviedo High School and Lawton Elementary), and public facilities such as the fire station and library. The City of Oviedo has plans to redesign the downtown area to create a more pedestrian friendly environment while incorporating the trail into the design.

The Winter Springs Town Center is also located along the trail giving residents and visitors access to public facilities such as Town Hall, a variety of business from salons to retail and a major food store, and numerous restaurants ranging from fast food to casual dining and wine bars. The area surrounding the Town Center is planned to expand upon the newly built town homes ultimately creating a live, work and play community.



Three overpasses exist along the Cross Seminole Trail and one is currently under construction (winter 2011/2012) with an additional overpass in the planning phase. The Cross Seminole Trail crosses Interstate 4 in Lake Mary/Heathrow where it connects with the Seminole Wekiva Trail. The bridge was completed in June 2003 and cost approximately \$3.7 million. The trail/equestrian bridge that crosses SR 434 was constructed in spring of 2005 at a cost of \$3.3 million. Lastly, the serpentine designed U.S. 17/92 overpass was completed in 2008, costing just over \$5 million.





Seminole Wekiva

At almost 14 miles, the Seminole Wekiva Trail has been designated as one of the County’s Showcase Trails because of its length, beauty and user accommodations. The western portion of the trail running from the I-4 Overpass to the Wekiva River is also designated as part of the Florida National Scenic Trail. As a Rail to Trail project, the Seminole Wekiva Trail was built on the Orange Belt Railway, at one time the longest railroad in the country. The Seminole Wekiva Trail consists of four trail heads: San Sebastian, Seminole County Softball Complex, Jones Trailhead and Markham, each consisting of various facilities, including trail parking for horse trailers.

Developers have embraced the Seminole Wekiva Trail as it brings visitors from communities such as Lake Mary and Heathrow and enhances the natural beauty of Seminole County. Many hotels are located along the Seminole Wekiva Trail offering this experience to travelers as well. In exchange for the road right-of-way, the developer of Heathrow International Business Center built more than a mile of the trail. The Pizutti Company built a 0.3 mile section of the trail adjacent to their retail shops, The Shoppes at Oakmonte, in Lake Mary.



Two underpasses are found along the Seminole Wekiva Trail.

The SR 434 underpass was constructed in '08-'09 at a cost \$4.4 million.

The Lake Mary Blvd/International Parkway Underpass was completed in late 2012 at a cost of \$3.7 million.



Sanford Riverwalk

The Sanford Riverwalk Trail follows the shoreline of Lake Monroe in Sanford and extends from U.S. 17-92 to Mellonville Avenue. Although currently at one mile, the trail provides access to historic downtown Sanford and connects many community resources in the area including Wayside Park, Log Cabin Memorial Park, Veterans Memorial Park, Fort Mellon Park, Sanford City Hall, Seminole County Courthouse, Sanford Museum, a public boat ramp, and Rivership Romance. The Amtrak Auto Train terminus is located Sanford, as well as a soon to be developed SunRail Station, thus exposing Downtown Sanford and the Riverwalk to visitors from around the world, an economic opportunity.

The connections and facilities along the trail provide the ideal location for gathering of all ages and a variety of community events. Planning continues to extend the trail an additional 4100 feet to the entrance of the Central Florida Zoo/CR 15/Monroe Road.



Downtown Sanford.

Courtesy of Seminole County Convention and Visitors Bureau



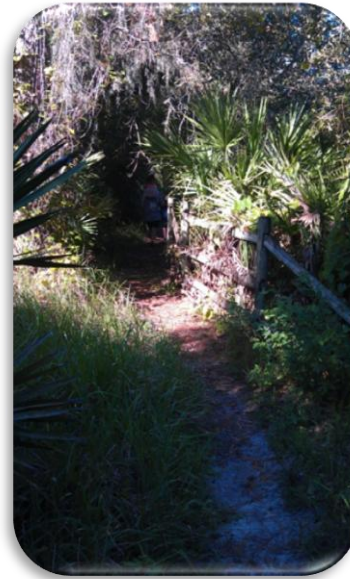
Sanford Riverwalk

Courtesy of Monroe Harbour



Flagler Trail

The Flagler Trail, also a County Showcase Trail, is Seminole County's unpaved wilderness trail located in rural Seminole County. The trail offers residents and visitors a first-hand experience of Seminole's Natural Side with equestrian facilities, hiking and wildlife viewing. The trail is located along the abandoned Okeechobee Branch of the Florida East Coast Railway. The right of way was purchased from the Department of Transportation in 1984. The southern portion of the trail is designated as part of the Florida National Scenic Trail. The Flagler Trail runs from the Geneva Wilderness Area to Snow Hill Road at Chuluota and to Lake Harney Wilderness Area, and crosses the Econlockhatchee River. The St. Johns Trailhead (Lake Harney Wilderness Area) and Snowhill Trailheads are the main access points for the Flagler Trail.



Methodology

Surveys were conducted at the following locations.

Cross Seminole

- Black Hammock Trailhead
- Big Tree Park

Seminole Wekiva

- Lake Mary Panera
- Jones Trailhead
- SanLando Park/Seminole County Softball Complex
- Markham Woods Trailhead
- San Sebastian Trailhead

Sanford Riverwalk

Flagler Trail

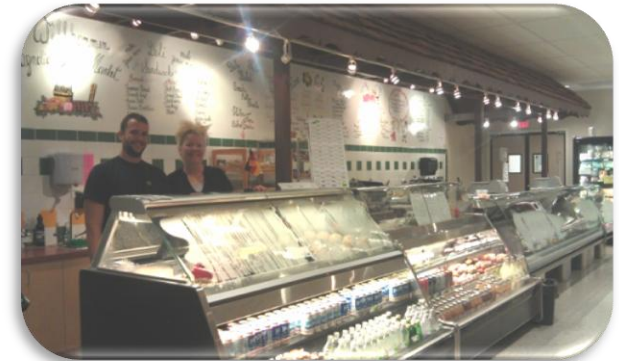
- Snowhill Trailhead
- St. Johns Trailhead

This project was undertaken to determine the economic impact the Cross Seminole, Seminole Wekiva, Sanford Riverwalk, and Flagler Trails have on Seminole County's local economy as well as identify marketing opportunities for the County, corporations, local businesses and the tourism community.

The surveys focused on three target groups:

- Trail users
- Businesses and hotels located in key locations on trail corridors
- Corporations located in the Lake Mary High Tech Corridor

Surveys were developed in coordination with the East Central Florida Regional Planning Council, Florida Office of Greenways and Trails, The Florida Greenway and Trail Foundation, the U.S. Forest Service and Seminole County. Surveys and lessons learned from the Orange County study completed in 2010 served as the base for Seminole County's survey development.





User Surveys

The goal of the trail user survey was to obtain statistical information concerning characteristics and spending behaviors of trail users. The resultant data, recommendations and comments will assist the County with trail development and marketing including trail facilities, events and programs, and trail related development. User surveys were conducted on all Seminole County trails. The survey was also made available on-line using Survey Monkey. Business cards listing the funding partners and the

365 total surveys were obtained from Seminole County Trail Users

online survey link were handed to trail users not wishing to participate in a face-to-face survey as well as distributed at the trail heads, particularly at locations where cars were visible, but pedestrian traffic was extremely limited. The online survey was also delivered to numerous outdoor recreation organizations, businesses and groups who utilize the trails, as well as the cities along the trail corridor. Many of these organizations distributed the survey information and survey link to their members through newsletters, organization websites and social media. Schools located along the trail were contacted with the request to distribute the survey information to their parents and teachers. The survey was distributed through the Parent Teacher Association and Dividends programs. A local news station, Channel 13, also placed the survey link on their website. In total, more than 34 contacts were made for the online survey distribution. Trail user surveying was conducted for 12 weeks, from October 1, 2011 through December 31, 2011. As a result, 111 total surveys were obtained at site locations and 253 surveys were obtained online.

Business Surveys

Business surveys were conducted at key locations along the trail system. Prior to conducting the surveys, each Chamber of Commerce associated with the survey area was contacted with a request to distribute information to their business contacts. Businesses along the trails, in the following areas, were contacted to complete a survey: Lake Mary, Longwood, Altamonte Springs, Oviedo, Winter Springs Town Center and Sanford. A total of 51 business surveys were completed. Hotels were contacted separately with assistance from the Seminole County Convention and Visitor's Bureau.

Corporate Surveys

The East Central Florida Regional Planning Council worked with the Seminole County Economic Development Director to identify appropriate corporations located in the vicinity of the Seminole Wekiva Trail in the Lake Mary High Tech Corridor. The goal of the corporate survey was to obtain information about whether the trail system had any impact on corporate office locations, employee recruitment and retention, and whether the corporation benefited from the trail. Twelve corporations were identified and each was contacted, at minimum, twice for participation; three corporations completed the survey. No significant findings were reported.



Analysis

The user and business surveys were created to obtain statistical information and economic data for analysis. The surveys were derived from a combination of previous user and business surveys from the 2010 Orange County Trail Study and the Trail Town Economic Impact Study by The Progress Fund and Laurel Highlands Visitors Bureau.

All trail user surveys contained identical questions that focused each question on a user's typical visit to the Seminole County Trail System. An online trail user survey was also made available using Survey Monkey and distributed through email, organization, community and county websites and in community newsletters. The online survey contained identical questions to each field survey.

The trail user and business survey results can be found in the Appendix.

The combine online and face-to-face trail user survey results allowed the characteristics and spending habits of a Seminole County Trail System trail user to be determined. In order to determine the economic impact of the Seminole County Trail System on Seminole County's local economy, the East Central Florida Regional Planning Council (ECFRPC) utilized the Regional Economic Model, Inc. (REMI) to model the economic impacts. The ECFRPC is the only organization in the region with a license for the REMI Policy Insight Model. REMI is a customized econometric model for the East Central Florida Region.

The custom calibrated model includes 23 industry sectors for every county in the state of Florida. REMI Policy Insight® is a structural economic forecasting and policy analysis model. It integrates input-output, computable general equilibrium, econometric and economic geography methodologies. The model is dynamic, with forecasts and simulations generated on an annual basis and behavioral responses to wage, price, and other economic factors. It consists of thousands of simultaneous equations within a structure that is relatively straightforward. The exact number of equations used varies depending on the extent of industry, demographic, and regional detail in the specific model being used. The overall structure of the model can be summarized in five major blocks: (1) Output, (2) Labor and Capital Demand, (3) Population and Labor Supply, (4) Wages, Prices, and Costs, and (5) Market Shares. Policy Insight's unique power is to generate realistic year-by-year estimates of the total regional effects of any specific policy initiative. The model is calibrated to many sub-national areas for policy analysis and forecasting and is available in single- and multi-area configurations. Each calibrated area (or region) has both economic and demographic variables so that any policy that affects a local economy can

Economic Definitions from REMI, Inc.

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

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.

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.



be tested. Users can also see the total economic impacts of each region using Policy Insight.

Using REMI, Inc. the ECFRPC looked at exogenous final demand in the food services and drinking places and retail trade categories and consumer spending in gasoline and oil. A counterfactual analysis was performed, removing demand and spending from Seminole County's economy, to establish the impact of this specific demand and spending.

The values used in this analysis were derived from the trail user survey results. The trail user surveys allowed the ECFRPC to collect data on spending habits associated with using the Seminole County Trail System. The data was collected in the categories identified by the survey question; restaurant, retail (food, beverage, shoes, etc.), transportation (gas, transit, parking), rental fees (bikes, skates, etc.), equipment (bike, trees), books, guides and maps, and lodging. This question identified specific consumer spending.

Specifically, the survey asked trail users, "Please indicate the average amount of money you spend during a typical trail visit in each category listed below". The respondents were asked to mark whether they spend \$0, \$5 and under, \$6-\$10, \$10-\$20, \$20-\$35, \$36-\$50, \$51-\$75, \$74-\$100, and over \$100 on the specific goods and/or services listed in the categories above. The median of spending in each category was calculated and the results were added to establish the average trail user spending value.

In 2009, Seminole County trail counters clocked 1,038,572 million trail hits or visits.

Factors to consider include:

- Some visitors are counted twice if returning in the same direction from which they came;
- All sections of the trail system are not equipped with trail counters.

Between 2009 and 2011, the trail system has expanded, connected and improved. Using the 2009 data and other factors, trail usage for 2011 is estimated to be over 1 million.

Results

Economic

Based upon survey results, the average spending per trail user is \$15 per visit. Furthermore, according to Seminole County, 1.1 million visits occur on Seminole County Trail System each year for recreation, health and fitness or transportation, which represents a total estimated expenditure by trail users of \$16.5 million. This figure does not take into account large annual or upfront purchases for trail use such as bikes and tires, equestrian gear and trailers.

Based upon the REMI model analysis, in 2011, the Seminole County trail system supported 174 jobs and an estimated economic impact of \$14 million to Seminole County's economy.

Table 1: Overall Economic Impacts of Seminole County Trails in 2011

Category	Units	2011
Total Employment	Jobs	174
Output or Sales	Millions of Dollars	\$14
Personal Income	Millions of Dollars	\$3



Out of the 51 businesses surveyed

- ***42.9% felt that the trail system has impacted sales/revenue somewhat in the past year***
- ***34.7% feel the trail had “strong” to “some” influence on the decision to choose the current business location***
- ***95% of businesses have not changed the way they have done business due to the trail (marketing, advertising, store layout, products, etc.).***
- ***89.4% have made no changes to operations due to the trail’s impact.***
- ***24% of the businesses have employees that use the trail to commute to work.***

Business

As derived from the business surveys, 42.0% of the surveyed businesses felt the trail had somewhat of an impact on their business. Employees of various businesses along the Seminole Wekiva and the Cross Seminole Trails use the trails to commute to work.

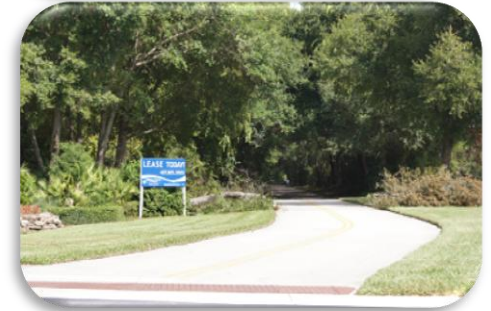
At Colonial Town Park, most shop owners were reluctant to fill out surveys. Some managers and staff were unaware of the trail location along International Parkway.

Colonial Grand, a Residential complex is located adjacent to the Seminole Wekiva Trail and across the street from the Colonial Town Shopping Center. The location of the trail was a significant contributing factor for the location of the residential complex and the Community Clubhouse is a short walk from the trail.

Many shop owners at **Shoppes of Lake Mary and Winn Dixie Shopping Center** felt that trail users were occupying parking spaces, thus inconveniencing clients. It was noted that several trail users preferred to park at this location so that they could shop or have lunch after using the trail. Management, in stores such as Walgreens, has placed nutritional and other energy items near the front of the store to accommodate trail users. Restaurants along the trail such as Peach Tree Café and Panera are popular destinations for trail users, especially on the weekend. *Panera specifically noted that 15-20% of their business can be attributed to trail users.*

Winn-Dixie staff stated that trail users currently use the grocery store and felt that the opening of the new tunnel under Lake Mary Boulevard will increase business.

In Longwood and Altamonte Springs, many business owners have noted an increase in customer awareness of their businesses due to their proximity to the trail. Owners acknowledged the benefits that safe pedestrian crossings have on their business. The new shopping center, Wheat Berry, located on the south side of S.R. 434 in Altamonte Springs stated that the location of the trail was an important component for their site selection and they plan to integrate bike racks and outside seating facing the trail.





Businesses in **Oviedo** offered variety of responses regarding the trail's impact on their operations. Much of the responses varied according to the type of business or service offered and whether the business was in operation prior to the trail's existence. Smaller business operations were responsive to the survey efforts. Businesses located in larger strip mall areas along the trail noted safety obstacles where the trail crosses the parking lot driveways.

Winter Springs Town Center had many empty store fronts. Those surveyed were mainly eatery establishments fronting S.R. 434 and were not located in the rear property visible the trail. A consignment store owner acknowledged trail users who visit the business and then return. Note, this business is located in the rear of the property.

Businesses in **Downtown Sanford** felt the Auto Train has more impact on their business than Sanford RiverWalk. Business owners expressed a disconnect between the downtown and the Riverwalk. Many felt strongly that the trail had no impact on their business and trail users did not come near the downtown. There are beautiful directional signs along 1st Street directing patrons toward waterfront businesses. Businesses on the riverfront felt that they could attract more business if Marina Island did not appear dark and desolate and was more connected to the Riverwalk. Both business owners and Riverwalk visitors questioned whether the Riverwalk was actually considered a trail.

Please see Appendix A for the comprehensive results of the business surveys.



The owner of No Limits Cycles stated that as trail users pass by other stores to reach to his store, his patrons have noted they become aware of the other adjacent businesses.

The owner of the Mobil Gas Station researched several other locations before buying the business near the SWT. "The trail was a positive feature that influenced (my) final decision to buy at this location."

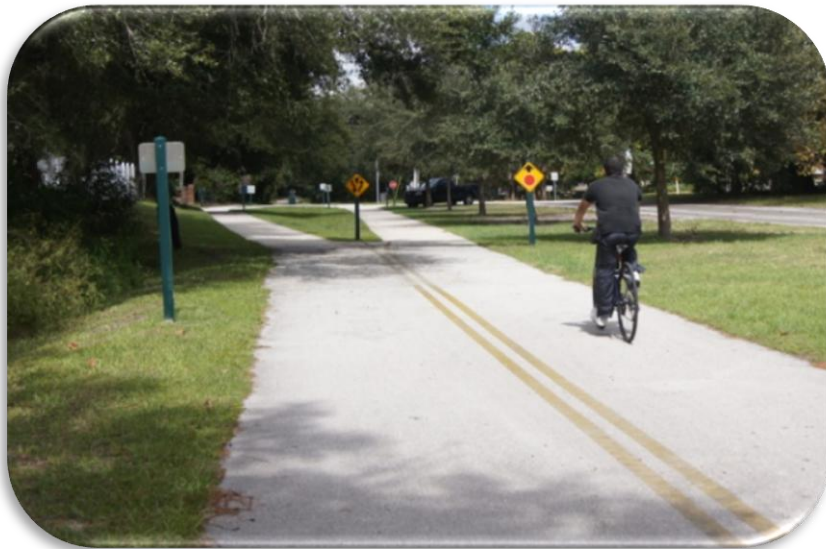
Trail User

The results of each question and analysis of the user surveys can be found in Appendix B. Key findings derived from the analysis are listed below.

- Almost half (48%) of respondents originally learned about the trail because they live(d) by the trail. 36% indicate they learned about the trail from family and friends, followed by a “drive by/roadside sign” at 17%.
- 28.5% of respondents typically use Seminole County Trails every day, followed by 24% who visit the trail 2-3 times per month.
- Year round trail visitors make up 79.8% of the survey respondents. These respondents indicated that they use the Seminole County Trail system regardless of season.
- Over 64% of respondents are over 45 years of age and over 90% of the trail users surveyed visit the trail in groups of 2 (55.2%) or more.
- Personal Vehicle (45%) and Bicycle (42%) were the main avenues of transportation to the trail, thus it is important to provide safe bike/pedestrian access from roadways and neighborhoods to the trail and trail heads.
- Bicycling was indicated as the most popular activity respondents participated in while on the trail, followed by walking. Horseback riding was indicated in “Other” by over 10% of respondents. It was noted that equestrian was not included as an actual choice in the survey.
- 62% of respondents would be more like likely to use a local vendor list and map while 47% would rather have coupons from local vendors.
- There was little variation among respondents when asked how often they return to businesses they noticed while on the trail. Response percents ranged from 23.1% - 28.6%. “Occasionally” was indicated by the most respondents at 28.6%.
- There were minor variations among respondents when asked how often they use a business while on the trail. Response percents ranged from 21.5% - 31.2%. “Never” was indicated by the most respondents at 31.2%.
- Over 75% of respondents strongly agree that “The Seminole County Trail System greatly impacts the quality of life in the County.”



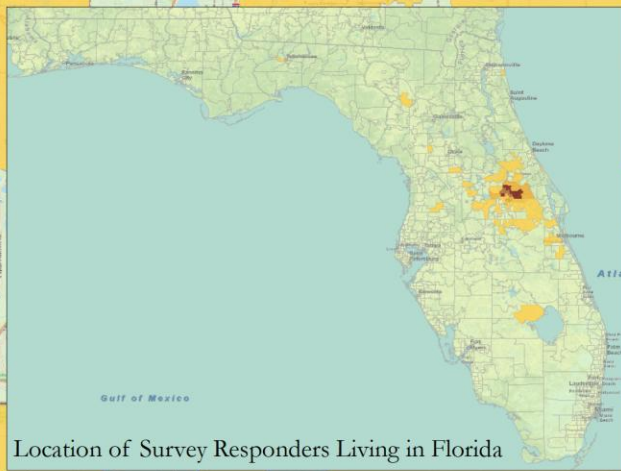
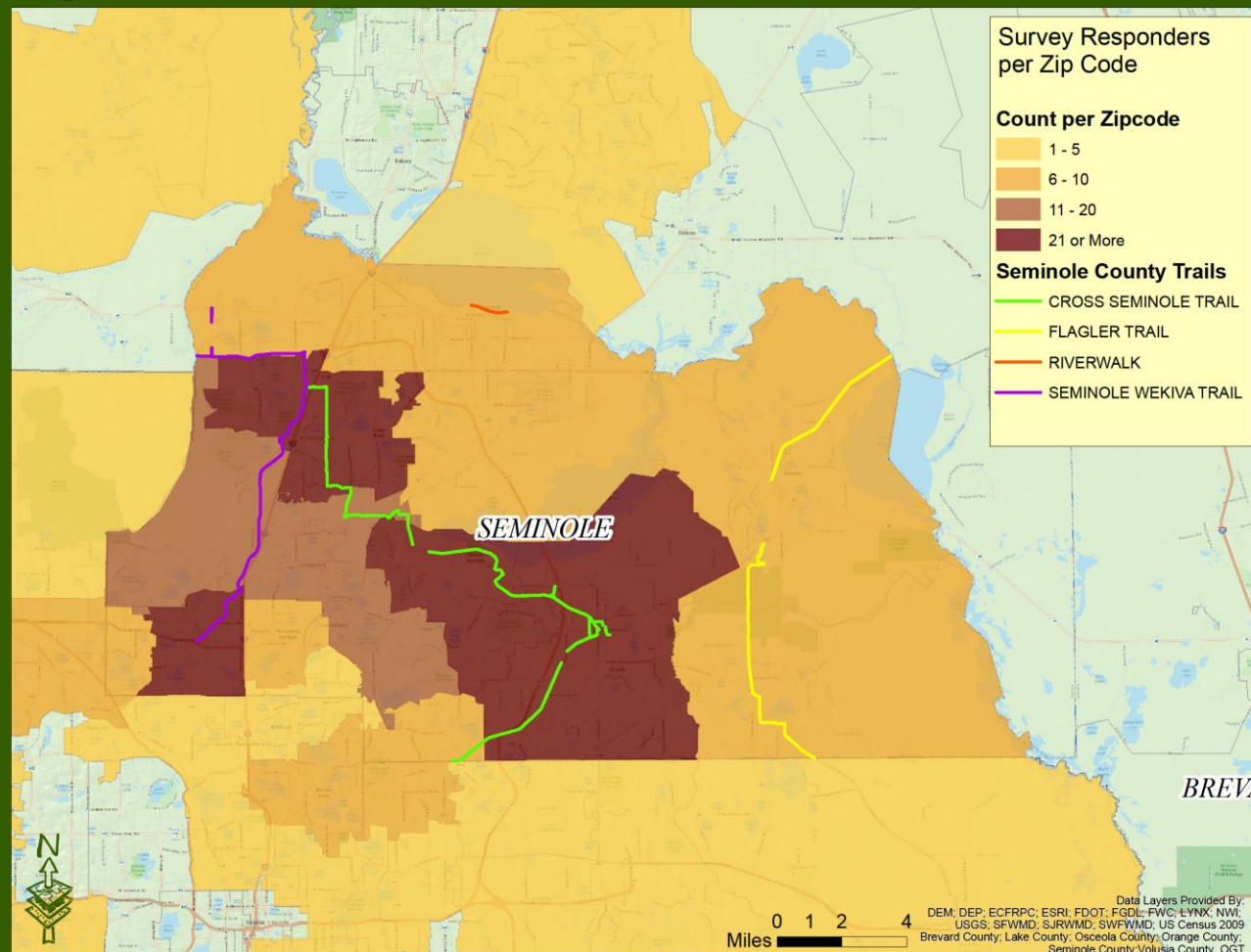
- Where applicable, only 42% of respondents were aware they were on the Florida National Scenic Trail and over 60% of the respondents were not aware that Seminole County is a Florida Trail Gateway Community.
- Restaurant expenditures were indicated by the most respondents as to the category of financial expenditures during a trail visit, followed by retail and transportation.
- Zip codes in which the trails passed through, represented the primary residences of the highest proportion of respondents. This indicates that accessibility may be a main factor in trail use as well as local knowledge. See the map below for the location of trail respondents by zip code in relation to the Seminole County Trails.





Responders Residence by Zip Code

Office of Greenways and Trails: Seminole County Trail Survey Results



CFGIS.org

www.ecfrpc.org



This map is intended to be used for planning purposes only and is not to be construed as a legal document. The ECFRPC and associated agencies have taken reasonable efforts to ensure the accuracy of this map. However, the ECFRPC and associated agencies provide no warranty as to the map's accuracy or completeness, and assume no liability for losses or damages incurred by persons relying on the information provided. Any reliance on the information contained herein is at the user's own risk. Use of geographic information by governmental entities, other state agencies, water management districts, regional planning councils, local governments, and other governmental entities and maps, including geographic information maps and other geographic information materials, as the source of data for planning or any other purposes, they must take into account that the accuracy and reliability of such maps and data may be limited by various factors, including the scale of the maps, the timeliness and accuracy of the underlying information, the availability of more accurate site-specific information, and the presence or absence of ground truthing or prior errors of the underlying information contained in such maps and other geographic information. This warning does not apply to maps adopted pursuant to part II of chapter 183, Florida, January 21, 2011 K:\PROJECTS\2011 Trail Study\GIS\ecfrpc_response_Ar.mxd

Recommendations

The recommendations below have been made based upon the results of the surveys and the feedback provided by businesses and trail visitors. Note that this analysis did not include a review of current redevelopment or CRA area plans and may include recommendations already being implemented.

Seminole Wekiva Trail

- Consider tasteful directional signage near the trail to make users aware of the stores and restaurants.
- Review the potential to enhance community and business area connectivity to the trail.
- Consider partnering with businesses to host a “Taste of the Seminole Wekiva Trail” to promote the trail and the business partners.
- Locating a trailhead with a shopping center benefits trail users and the shops and restaurants at the location. Sufficient or overflow parking should be provided and all designs should include enhanced bicycle and pedestrian connectivity within ½ mile. (Shoppes of Lake Mary and Winn Dixie Shopping Center may serve as a model.)
- Establish partnerships with Oakmonte Village and other facilities or groups to create programs for seniors who utilize the trail.
- Partner with property owners at the northeast corner of the Lake Mary Blvd tunnel to provide parking relief. Staff at this location stated that they were cleaning up their property in anticipation of the trail tunnel opening. They were interested in potential partnerships with Seminole County to provide some trailhead services.
- Connection of the SWT to Lake County, across the Wekiva River, provides increased opportunities for eco-tourism economic opportunities including outfitters, bed and breakfasts, equestrian facilities, and trail tours.
- The Shoppes of Lake Mary should consider improving their connection to the trail.



Cross Seminole Trail

- Consider tasteful directional signage near the trail to make users aware of the stores and restaurants.
- Review the potential to enhance community, neighborhood and business area connectivity to the trail.
- Work with the City of Oviedo and the Winter Springs Town Center to target trail oriented businesses/coffee shops/restaurants and trail targeted events in an effort to make the trail a greater amenity in the downtown and town center.
- During redevelopment and re-alignment of roadways in Downtown Oviedo, consider the trail as a main transportation and economic development device, creating a connected and safe pedestrian destination in Oviedo.
- Work with the businesses in Oviedo/Red Bug to address trail parking in the rear private parking lot.



Sanford Riverwalk

- Consider tasteful directional signage near the trail to make users aware of the downtown. At the time of this report, Sanford installed beautiful directional signage along the major roadways for the many points of interest in Sanford including the downtown and Riverwalk.
- The naming convention of Riverwalk and Lake Monroe may confuse tourists, especially when viewing AutoTrain Maps depicting Lake Monroe. A more robust marketing campaign and strategy to quell the confusion may be warranted.
- Based on the business surveys in downtown Sanford, there is disconnect between the Riverwalk and the Downtown. Consider working with local business owners to develop a connected marketing plan for the area as a whole.
- The redevelopment of the vacant buildings and areas including Palmetto Ave. and Sanford Ave. to connect 1st Street and the river offer an opportunity to create a cohesive destination and a seamless transition between the water front and the downtown. This transition will draw people from the park and waterfront to the downtown and those in the downtown to waterfront. Redevelopment opportunities may consist of mixed-use facilities, similar to the Gateway development, with businesses or parking on the ground floor, and offices and condos or apartments above. A small grocery or produce store within this mixed-use redevelopment area would promote the use of the Riverwalk for transportation and enable park and Riverwalk visitors to purchase everyday goods.
- Consider additional tourism and eco-tourism business such as bed and breakfasts, nature outfitters, and other facilities to draw Autotrain visitors overnight in the downtown area.





- Investment and beautification has been occurring on Marina Island by extending the Riverwalk and bench facilities along the island and behind the hotel. The existing limited lighting and vacant feel of the area still deters many patrons from venturing onto the Island to take advantage of the restaurant, hotel and serene views of the river. Enhancing signage, lighting and creating a gateway to the marina area should be considered. In addition, enhancing facilities and businesses on the island may also offer opportunities for those visiting Rivership Romance. The hotel owner has expressed desire to work with the City to enhance the draw of this location.
- Continue to work towards the connection of the Riverwalk with the Seminole County Trail System.



General Recommendations and Comments from Trail Surveys

- **Continue to work on connections and provide more trail miles.**
 - throughout the county (Environment Center, past Layer Elementary, Oviedo)
 - to other county trail systems(West Orange Trail, Apopka)
 - to communities, shopping, schools and neighborhoods.
 - Better access to the trail for jogging and bicycling through down town Oviedo Lake charm area.
 - Get Lake County to build trails to connect to Seminole County. Also, the Wekiva Expressway project MUST include a bike trail from County Line to Mt Dora in Lake County.
 - Create system and more trails to keep bike commuters off highways and enhance commuting opportunities.
 - Develop additional trails
 - Finish the 3 gaps that have been open for far too long.
 - Extend trail or walking path down 17-92 from Riverwalk towards I-4. Many people travel that road in unsafe conditions.
 - Provide connections to ride from Cady Way to Sanford.
 - less dead ends so it is easier to use for transportation.
 - Rails should all connect without the interruption of a roadway/traffic route.
- **Market and advertise the trails in neighboring counties.**
- **Increase and enhance signage (directional and mileage) along the trail.**
 - Show the entire connected network with distances, and arrows pointing to different legs and the destinations they lead to. (Ex:The Appalachian Trail)
 - Signs guiding people from the broken parts of the trail to completed parts (Longwood, Oviedo, Lake Mary/427)
 - Markers along the trail that point out and give information on trees, wildlife or other plants found along the way.
- **Produce a user friendly trail map.**
 - Include distances to trail heads, town centers, and other points of interest.
 - Include information for emergency services and bike support.
 - Make the map available on line and distribute at trail heads and various bike shops along the trails.
 - Place maps at each road entrance.
- **Enhance business patronage.**
 - Info about businesses located near the trail, especially breakfast, lunch, and snack businesses.
 - We would go farther if we knew there were treats ahead.
 - Snack shops along the trail.
 - Tax credits to coffee and bike shops near trail.
 - Partner with local business to enhance trails and parks.
 - Winter Spring Town Center needs Starbucks.
 - Bring some bed and breakfasts along the trail.
 - If maps were produced that advertised retail outlets near the trails it would help educate people that bikes can be used for errands and help the businesses expand their customer base.
- **Maintain mosquito spraying, especially on Flagler Trail.**

- **Replace Deck on lake.**
- **Maintain trails and facilities regularly**
 - blowing leaves and sticks, cracks
 - repave dangerous areas where roots have destroyed surface
 - trim tree limbs
 - Tree canopies need to be trimmed to height that allows person on horseback to access without ducking, and park vehicles under trees for shade without scratching them.
 - .Sand is a hazard in some areas (West Altamonte Rec. Area and San Sebastian)
- **Trail etiquette signs and outreach.**
 - Create a centerline along trail.
 - Need signs to remind people to treat the trail as a roadway.
 - Leash your pets.
 - After dark wear front and rear lights!
 - Constantly finding the motorized vehicles from Sanlando Park and the softball complex driving the trail. They typically drive too fast and with little care of trail users.
 - Speed limit but no signs
- **More off road trails**
 - Create ATV trails.
 - Not all the trails need to be paved with asphalt. Using a soil/cement mix or something similar would reduce costs for an expanded network. If a new "dirt trail" reaches a set level of traffic, then pave it.
 - Convenience to single track; off road
- **Smoother curbs at street crossings along the SWT. Along International Drive it is easier to ride in the street rather than over all of the driveways.**
- **Increase trail facilities and enhance trail experience:**
 - Provide a shelter or weather shed every few miles.
 - Provide trailside benches along the south end of the Seminole Wekiva Trail.
 - Educational kiosks about the history of the area
 - Shade Trees
 - Plant wildflowers
 - Provide landscape to decrease mowing.
 - Opportunity for community garden/co-op
 - Add an overlook at the end of the Seminole Wekiva trail on the Wekiva river.
 - Provide more restroom and drinking fountain facilities (Long Pond Road, SR 419)
 - Dog water baskets
 - More park areas with cleaned picnic sites
 - Picnic tables throughout
 - Animal waste disposal areas with plastic bags.
 - Maintain restrooms.
- **Improve horse facilities and encourage more equestrian trail opportunities.**
 - Add a water trough and hose at Flagler Trailhead.

- Water buckets for horses need to be cleaned more often.
- Provide easy to open and close gates at the equestrian parking area
- More horse
- Acknowledgement that equestrians are a large user group.
- **Improve crossings and signal coordination between automobile and pedestrian traffic.**
 - Improve the intersection of Slavia Rd. and #426 (Aloma), It is very dangerous: when the walkers or riders receive the walk white hand sign, the left hand turn lane off of 426 gets a green light. This makes the walkers and riders targets. Several riders have been hit.
 - Put in a traffic light with a button at the end to cross Aloma.
 - The button at Tuscowilla needs to work faster and go back sooner.
 - Make sure all trail crossing are safe and riders can see traffic and be seen by traffic in both directions.
 - Eliminate having to cross over big roads.
 - Provide safe and easy way to cross 426 by the Oviedo Mall light.
 - Traffic at the "Circle" and on RT434 makes it difficult for the residents of the lake charm area to get to the trail.
 - Improve trail crossing and connections through downtown Oviedo.
 - Add bicycle/.pedestrian bridges or tunnels at major motor vehicle intersections.
 - Speed humps for motor vehicles at crossings.
 - Bridges like in St Pete for heavy crossings like 46A.
 - Crosswalk lights on 419.
 - Correct angle at the stop sign headed wst bound after crossing the bridge and the approach to the road between McDonalds/Barnies. Inexperienced cyclists don't have the skills to look south while pedaling and most don't stop.
 - Speed bump. warning signs or no right turn sign at light on Slavia at Aloma
 - Mitchell hammock road between 426 and 434...most dangerous stretch for bikes.
- Please speak with the Goldenrod Civic Association. They are working on Safety for the portion of the trail just the on the other side of Hall Road in Orange County.
- Seminole county should come up with something similar to the West Orange Trail.
- **Increase safety:**
 - Increase police presence in the evening.
 - Bike Patrol
 - There is one area on the Cross Seminole trail (under the overpass) I never feel really safe on; that area seems very barren and desolate to me.
 - Increase Ranger presence on Flagler Trail.
 - Clean out trees and shrubs that hinders the vision in the intersections.
 - Eliminate the large holes near the softball field on SWT. These are created by some utility covers that are below the grade of the road way.
 - Lighting (Solar)
 - Emergency call boxes at each trail head.
 - Lighted parking lots.
 - Encourage sign in at Snow Hill trail head. Many times, the parking lot is full, but the sign in page is empty. Safety and usage issue.
- **More Events**
 - Guided hikes
 - Running events
 - More family oriented events.

- Great for 'Geocaching'!
- Trail Tours
- Group Activities
- Question #14 does not reflect the monies spent on trucks & horse trailer/tack/riding apparel/protective gear, etc for riding horse on the trails - these figures can go into 100's of thousands spent on this hobby.
- It may be more useful to split Question 14 into "per visit" and "annual" categories...the majority of Equipment and BGM purchases (and some Retail) are not going to be applicable to a single visit...they are more like capital expenditures to prepare for the activities.
- as a user group equestrians add more to the local economies than most others.
- Please provide funding to connect and expand the trails.
- Notice how much \$\$\$ I spend getting to the trail coming from Sorrento, requires a fuel fill almost every time! All fuel stations are in Seminole County when coming from East Sorrento area. I also buy my tires in Sanford, for both truck & trailer.
- I ride my horses at Snow hill, Flager, and Monroe (Becks Ranch). I LOVE my trails! They restoreth my soul. Thanks Seminole County!!!!
- The county is doing a wonderful job!
- Trails are well maintained and a great way to get exercise and socialize with my riding friends.
- I love the trails in Seminole County. They do a wonderful job of keeping up the trails.
- I love the Flagler Trail.
- Sanford Riverwalk was a great idea.
- I love the trail system.
- Doing well, like the underpass.
- Good parking facilities.
- Trails are a great expenditure.
- Keep on Trucking
- A great trail, a couple of rough spots.
- Best system I have experienced.
- Keep the trails. I bought my house to be by the trail.
- Love riding the trail with my granddaughter; great exercise.
- The Riverwalk is wonderful; Thank you.
- We love the trails we use.
- Love it! Geneva is great.
- Keep it nice and quiet; nature.
- We come for Willow Tree Café.
- Feel very fortunate to have access to trails.
- Great place to live, wouldn't live anywhere else.
- I live in Tusawilla and feel very fortunate to have the Trail in my backyard. It helped me to lose 40 pounds 2 years ago and I continue to keep it off because of my weekly walks. The Trail provides an incredible opportunity to renew one's mind, body and spirit, while communing with friends, family and nature.
- I've lived in Seminole County since 1983 and think the Seminole Wekiva trail had been a fantastic addition to the county. My wife and I use the trail year-round on pretty much a daily basis and are very grateful for its existence.

- I feel very blessed to live in this area because the state does take care of bicyclist when it comes to safety and the quality of these trails I ride five to six days each week. I moved here four years ago from Missouri and this state is awesome when it comes to all of the fine trails to ride on!
- We have the start of a great trail system. Let's fill it out.
- We love the trails.
- Love the trails in Seminole County. Feel so blessed to live here
- I sure wish we had such excellent trails on the east coast. I drive an hour or more just for fun and camaraderie.
- Fantastic scenic overpasses; Huge restaurant access via trail. Certainly a great asset to the community
- Seminole County impresses me a lot.
- The trails are awesome. We see all age people out doing everything. It is so important to have a safe trail for all to use for transportation and fun.
- I do the 54 mile loop every week on your trails.
- Keep up the good work, and thank you for providing such a great trail.
- Best way they spend my tax money, so good for the community.
- I LOVE the trails!!!! If I was buying a house I WOULD look for one that was within riding distance to a trail. The more the better! We use the SWT, the Cross Seminole, the West Orange Trail and more rarely the Cady Way. I wish there was a connection to Volusia County and more trails there. Also would be good to have connections to OFF ROAD trails along the way.... :)
- More events on the trail that would promote health and fitness for children. Like rollerblading day, bicycle day, walk/jog, scavenger hunt three to four times a year at least. Please consider our children as you move forward with your plans. Thank you for giving me this opportunity to voice my concerns.
- The trail is our backyard, and we truly couldn't live in a better location! We have taught our children to ride their bikes on it, and before my foot surgery I ran on it daily (now I walk). It is a peaceful place that is wonderful for families to utilize!!!
- Thanks for putting in and maintaining the trails. Makes for a safer workout environment vs. riding on the road.
- I mainly use the trail to ride to weekday evening rides with the Seminole Cyclists from May thru October. I also use the trail occasionally on rides during the weekends coming home from longer "road rides" throughout the year.
- Love the trails. Great system. I feel all the trails are well maintained. Also I have nothing but praise for the landscape crew on the Seminole Wekiva trail. They always stop equipment for trail users as they pass A+.
- The trail system is a jewel for Seminole Counties and one of the primary reason for living here.
- I and my co-workers would use it as transportation back and forth to work if I felt safe doing so.
- I really appreciate Seminole county making these trails a priority. It is a real benefit to the community. I see more people cycling in Seminole co. than any other co.
- Very, very important that trails provide safety, beauty, fitness and community.
- I can walk out my backdoor and get to the trail. I am appreciative of the fact that I don't have to spend any money in order to find natural beauty for exercise and enjoyment. We enjoy inviting friends to come join us on the trail and visiting the many parks that are linked by the trail.
- The trails are a great benefit and are used a lot.
- We truly enjoy riding at the Little Big Econ-Snowhill trail head!!
- I've noticed a greater variety of trail users as people become aware. More families, individual walkers, commuters are out. Keep the trails coming!
- Seminole County does a great job of building and maintaining the trail system. Thanks for all you do!
- The trails are wonderful. Thank you for the additions through Seminole County and letting the people see what the area used to look like.
- Thank u for your continuing to expand the horse trails. We travel 1400 miles each year to ride throughout Florida.
- Thank you for providing us a wonderful place to ride our horses.

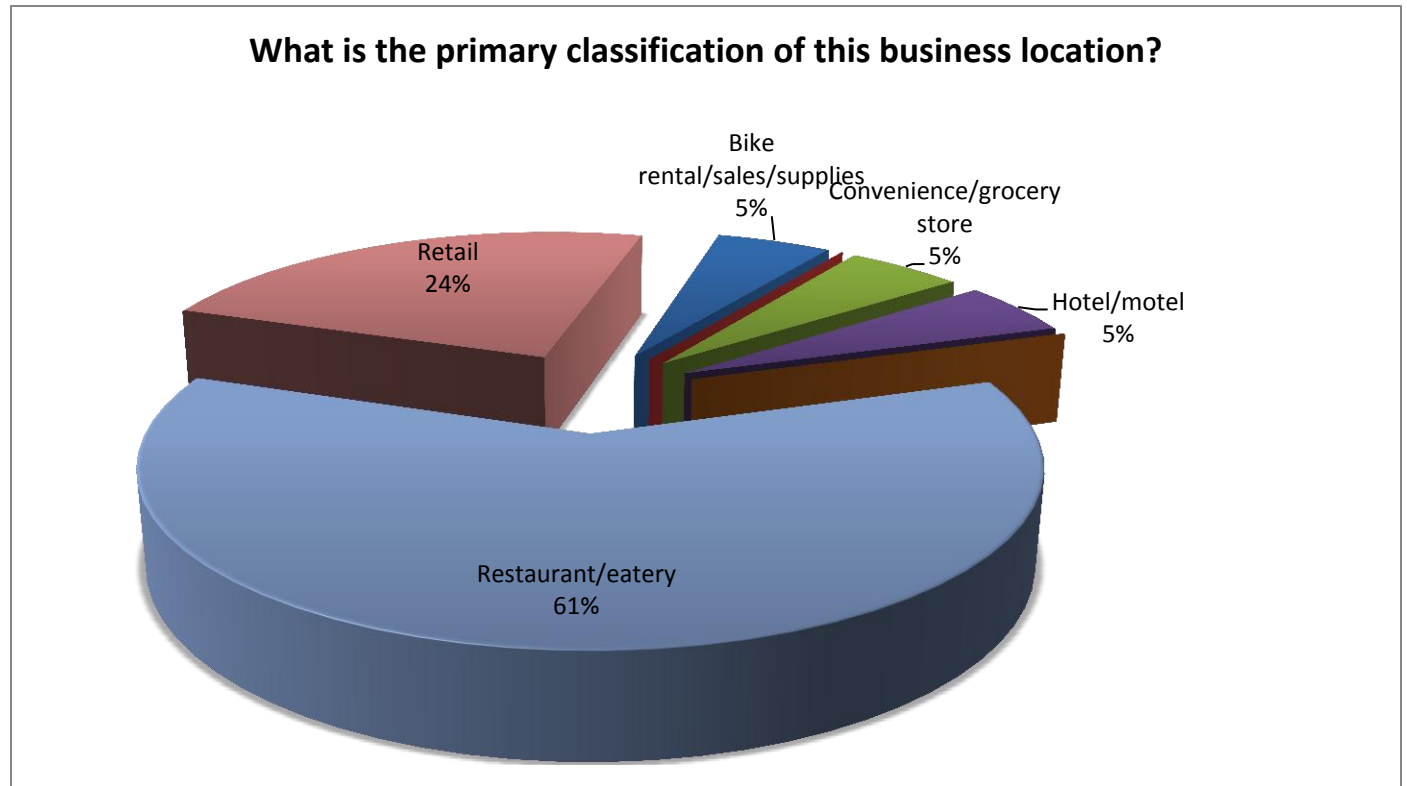
- Our trails are amazing and I feel so blessed to have them.
- We always stop to spend money to support businesses along the trails, and are planning an overnight bicycle tour this winter that will use the trails and spend one night at a hotel near SR46A.
- The trails are well maintained overall. I appreciate the tunnels under major roads. I'm looking forward to all the trails being connected so I can go on much longer rides.
- The horse trail system in our area is great. We often go to the trails in Seminole, Orange county. Florida is a beautiful state and our trails show it.
- I LOVE that state of Florida and the individual counties are preserving these wonderful bits of nature for athletes, families, and pet owners to get away from crowded city conditions... THANK YOU!
- Restaurants on the trails would be awesome!!!
- I was on the trails committee back in 1997 and am so excited to see the progress!!! A bridge over Aloma connecting Cady Way and Cross Seminole would be awesome!
- I appreciate the trail and being able to use it to commute to work daily. It is a wonderful service and a fantastic use of some great natural space in Seminole county. I look forward to the final connection from the Cross Seminole trail to connect with the trail in Longwood.
- Leave the trail to nature.
- If longer more likely to spend \$ long distance.

Appendix A

What is the primary classification of this business location?

Answer Options	Response Percent	Response Count
Bike rental/sales/supplies	5.3%	2
Campground	0.0%	0
Convenience/grocery store	5.3%	2
Hotel/motel	5.3%	2
Bed and Breakfast	0.0%	0
Outdoor recreation/outfitter	0.0%	0
Restaurant/eatery	60.5%	23
Retail	23.7%	9
Other (please specify)		33
	<i>answered question</i>	38
	<i>skipped question</i>	13

The majority of businesses surveyed (60.5%) were restaurants/eateries, followed by retail at 23.7%.



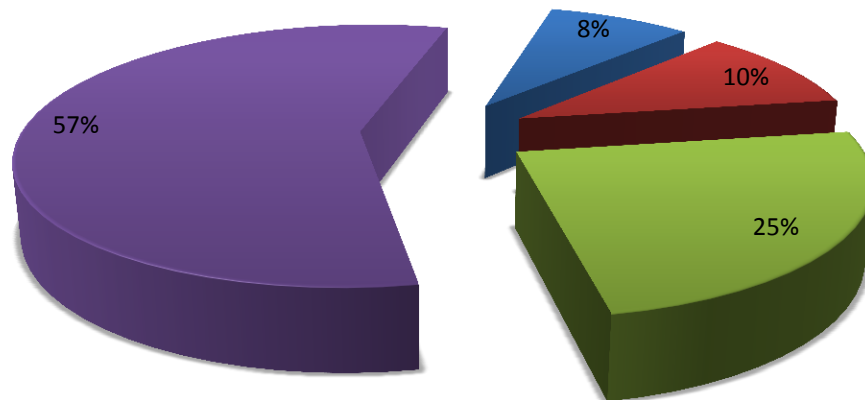
What influence did the trail have on the decision to choose this location for this business?

Answer Options	Response Percent	Response Count
Very strong influence	8.2%	4
Strong influence	10.2%	5
Some influence	24.5%	12
No influence	57.1%	28
<i>answered question</i>		49
<i>skipped question</i>		2

57% of businesses surveyed felt that the trail had no influence on their decision to choose their business location. 25% felt the trail had some influence with 18% feeling a very strong to strong influence.

What influence did the trail have on the decision to choose this location for this business.

Very strong influence Strong influence Some influence No influence



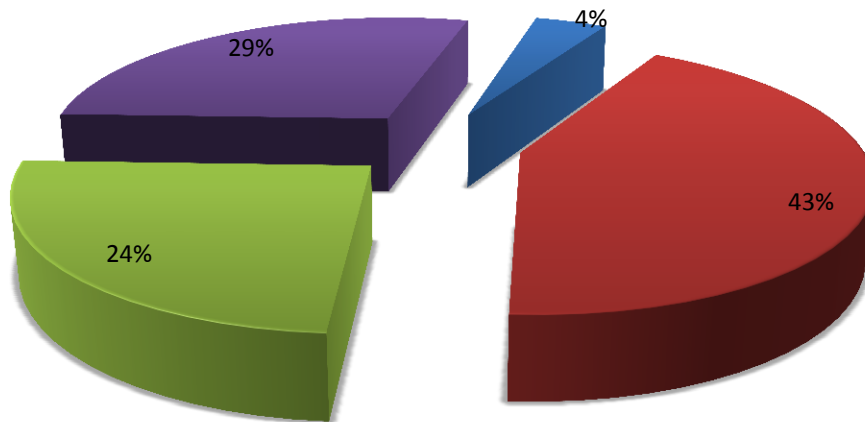
What impact has the trail system had on your business in the past year?

Answer Options	Response Percent	Response Count
Increased sales/revenue significantly	4.1%	2
Increased sales/revenue somewhat	42.9%	21
Has had no impact	24.5%	12
Not applicable/Don't know	28.6%	14
<i>answered question</i>		49
<i>skipped question</i>		2

43% of those surveyed felt that the trail system had increased their sales/revenue somewhat but 24% felt that the trail has had no impact. It is important to point out that 29% chose “not applicable don’t know”. It is recommended that this be looked into more from a marketing perspective to see if business owners understand their relationship to their customers and their customers’ relationship to the trail.

What impact has the trail system had on your business in the past year?

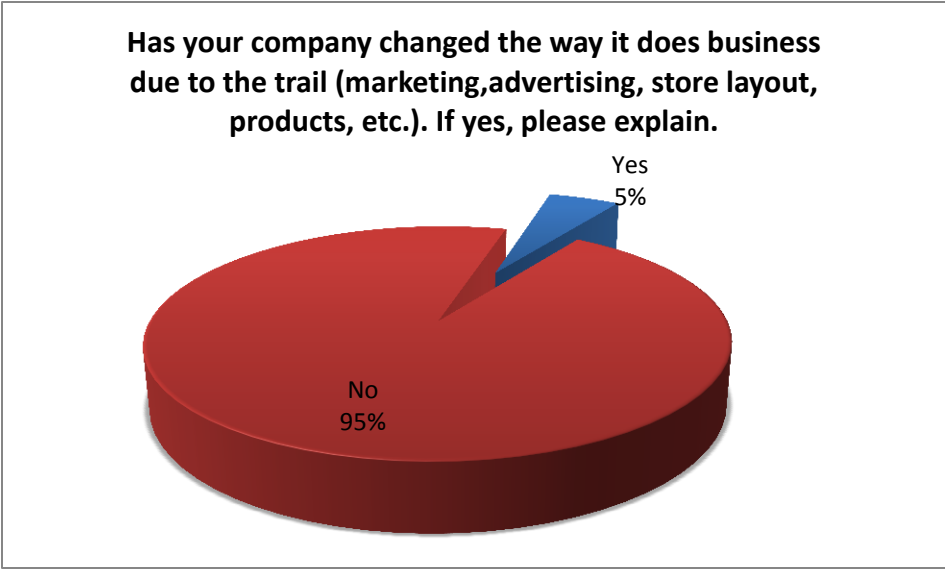
- Increased sales/revenue significantly
- Increased sales/revenue somewhat
- Has had no impact
- Not applicable/Don't know



Has your company changed the way it does business due to the trail (marketing, advertising, store layout, products, etc.). If yes, please explain.

Answer Options	Response Percent	Response Count
Yes	5.0%	2
No	95.0%	38
Other (please specify)		5
	<i>answered question</i>	40
	<i>skipped question</i>	11

An overwhelming majority of 95% said that they have not changed the way they do business due to the trail.



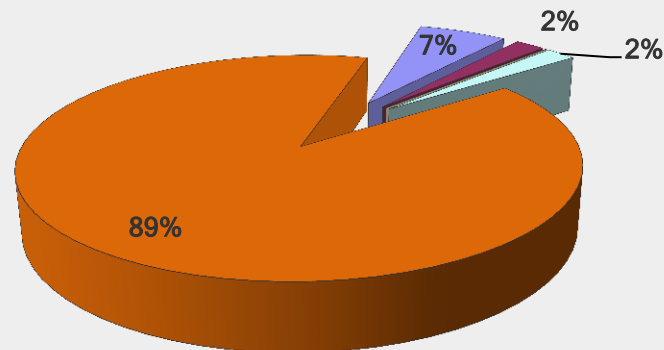
Has the trail had any impact on your decision to do the following with respect to your operations? Check all that apply.

Answer Options	Response Percent	Response Count
Expand operations in the past year	6.4%	3
Make plans to expand operations	2.1%	1
Create new positions in the past year	0.0%	0
Other (please explain)	2.1%	1
No changes to operations	89.4%	42
<i>answered question</i>		47
<i>skipped question</i>		4

A majority of 89% have also said that they have not changed operations due to the trail.

Has the trail had any impact on your decision to do the following with respect to your operations? Check all that apply.

- Expand operations in the past year
- Make plans to expand operations
- Other (please explain)
- No changes to operations

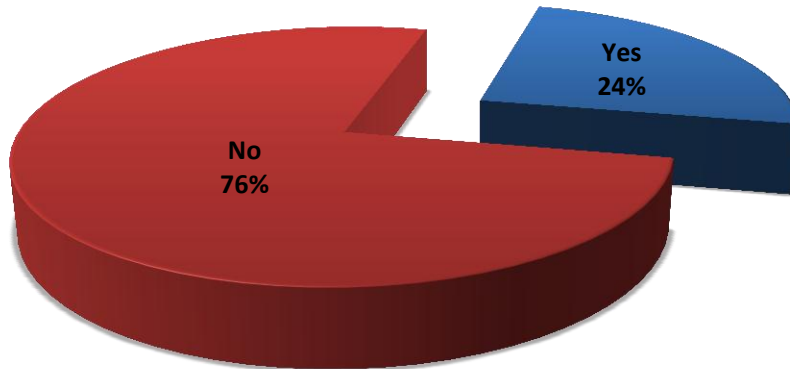


Do any of your employees use the trail to commute to work?

Answer Options	Response Percent	Response Count
Yes	24.0%	12
No	76.0%	38
<i>answered question</i>		50
<i>skipped question</i>		1

It is important to note that 24% stated that some of their employees use the trail to commute to work. This is an alternate means of transportation for part of the County workforce.

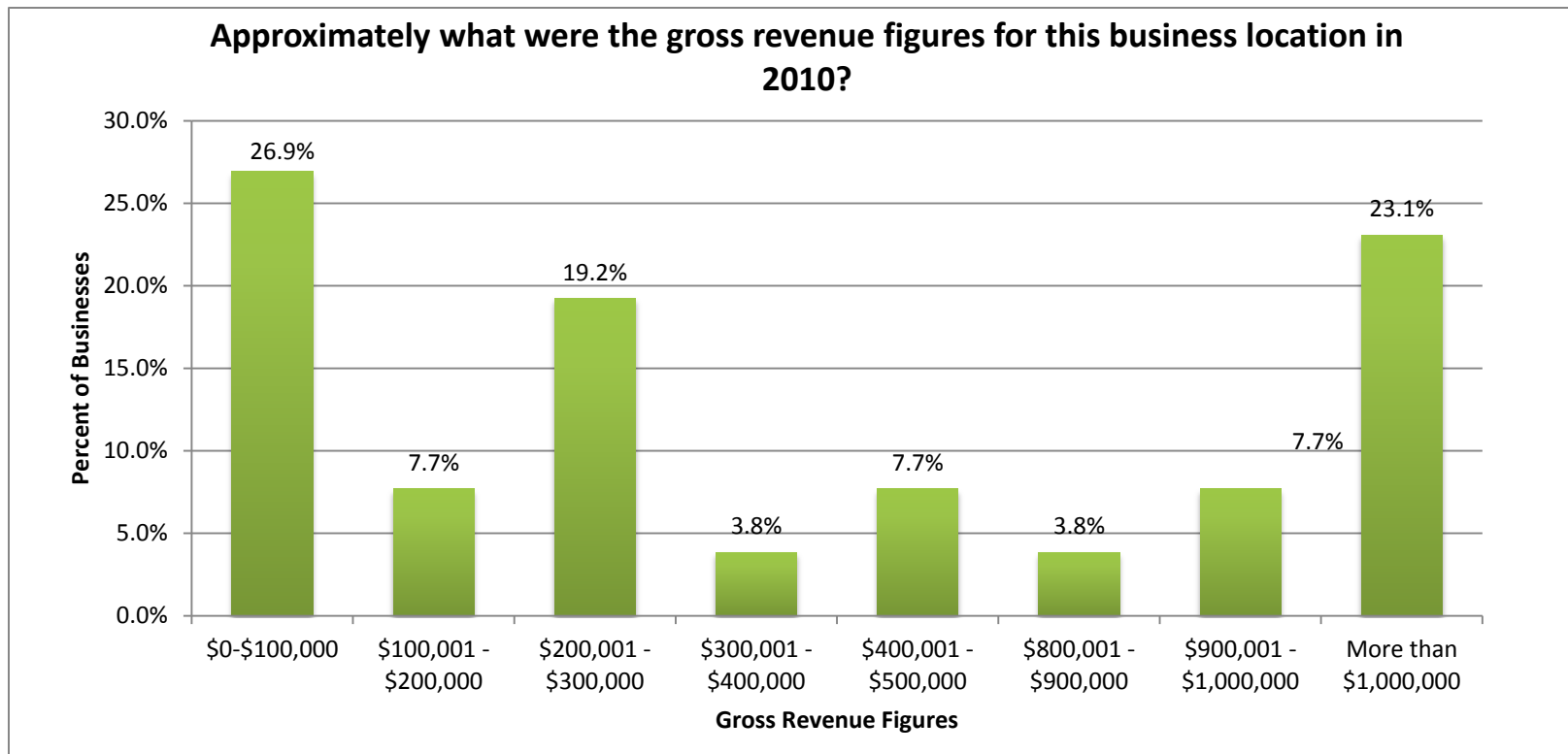
Do any of your employees use the trail to commute to work?



Approximately what were the gross revenue figures for this business location in 2010?

Answer Options	Response Percent	Response Count
\$0-\$100,000	26.9%	7
\$100,001 - \$200,000	7.7%	2
\$200,001 - \$300,000	19.2%	5
\$300,001 - \$400,000	3.8%	1
\$400,001 - \$500,000	7.7%	2
\$500,001 - \$600,000	0.0%	0
\$600,001 - \$700,000	0.0%	0
\$700,001 - \$800,000	0.0%	0
\$800,001 - \$900,000	3.8%	1
\$900,001 - \$1,000,000	7.7%	2
More than \$1,000,000	23.1%	6
<i>answered question</i>		26
<i>skipped question</i>		25

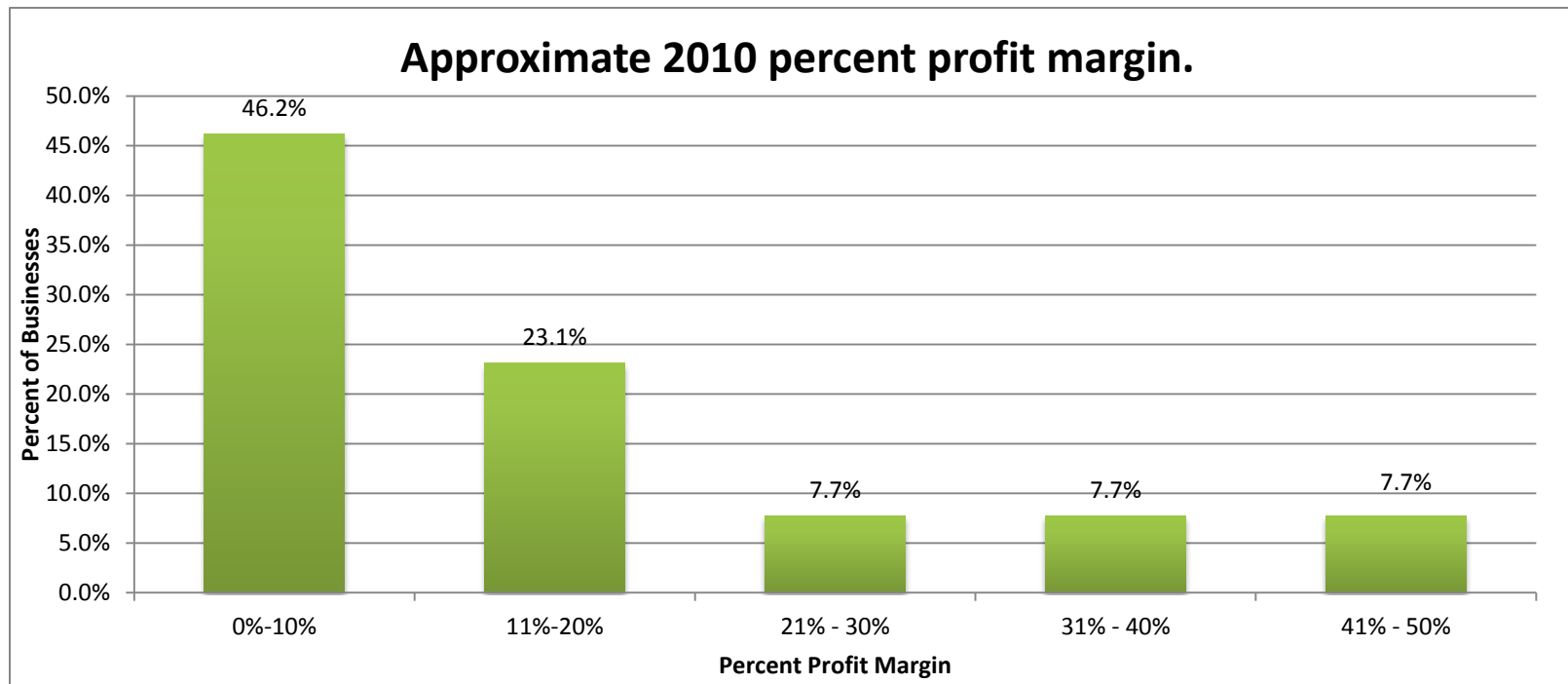
2010 Gross revenue figures for businesses surveyed can be found in the graph below. 6 of the businesses surveyed brought in more than \$1,000,000 in 2010.



Approximate 2010 percent profit margin.

Answer Options	Response Percent	Response Count
0%-10%	46.2%	12
11%-20%	23.1%	6
21% - 30%	7.7%	2
31% - 40%	7.7%	2
41% - 50%	7.7%	2
51% - 60%	0.0%	0
61% - 70%	0.0%	0
71% - 80%	0.0%	0
81% - 90%	0.0%	0
91% - 100%	0.0%	0
<i>answered question</i>		26
<i>skipped question</i>		27

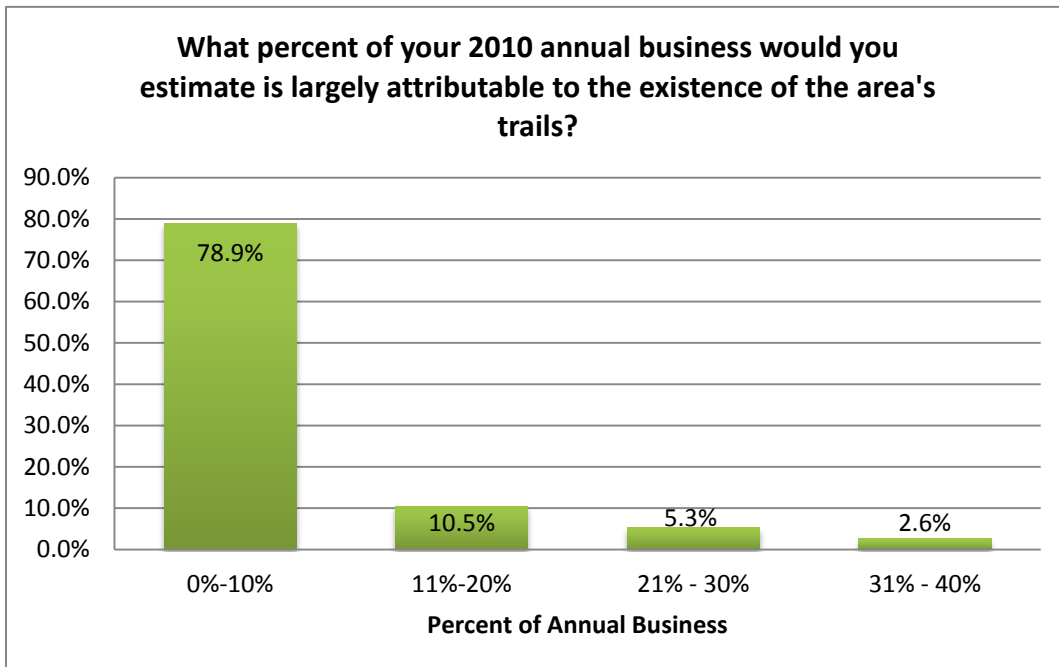
2010 percent profit margin can be found in the graph below.



What percent of your 2010 annual business would you estimate is largely attributable to the existence of the area's trails?

Answer Options	Response Percent	Response Count
0%-10%	78.9%	30
11%-20%	10.5%	4
21% - 30%	5.3%	2
31% - 40%	2.6%	1
41% - 50%	0.0%	0
51% - 60%	0.0%	0
61% - 70%	0.0%	0
71% - 80%	2.6%	1
81% - 90%	0.0%	0
91% - 100%	0.0%	0
<i>answered question</i>		38
<i>skipped question</i>		13

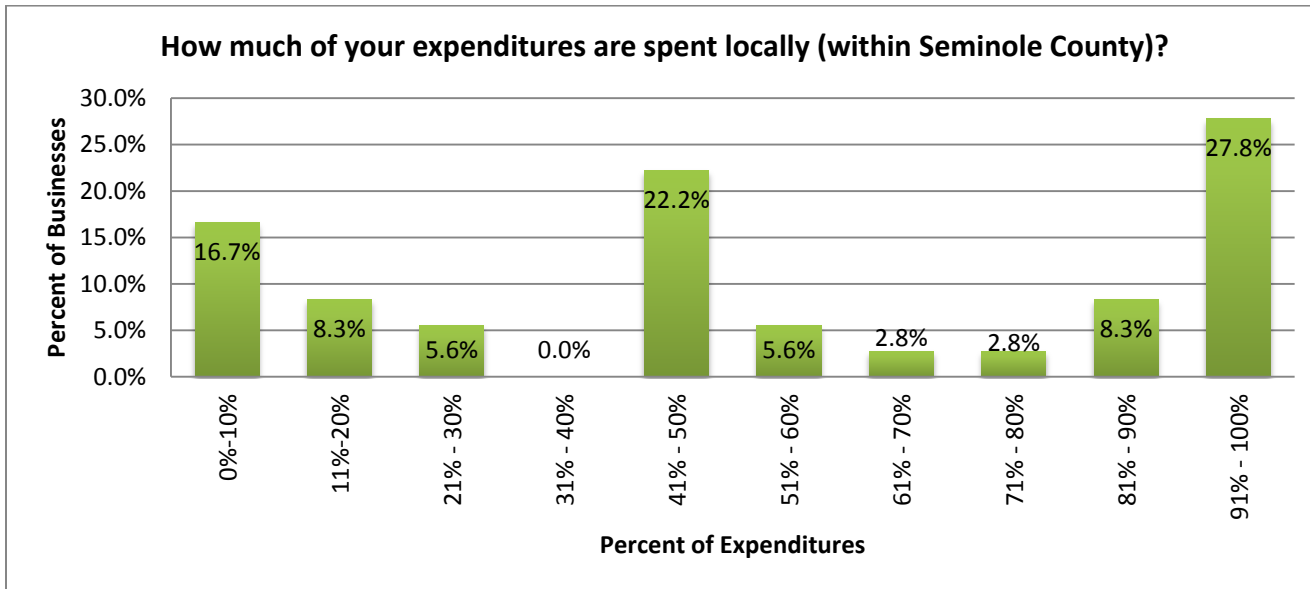
A majority of 78.9% said that 0-10% of their annual business was attributed to the existence of the area's trails.



How much of your expenditures are spent locally (within Seminole County)?

Answer Options	Response Percent	Response Count
0%-10%	16.7%	6
11%-20%	8.3%	3
21% - 30%	5.6%	2
31% - 40%	0.0%	0
41% - 50%	22.2%	8
51% - 60%	5.6%	2
61% - 70%	2.8%	1
71% - 80%	2.8%	1
81% - 90%	8.3%	3
91% - 100%	27.8%	10
<i>answered question</i>		36
<i>skipped question</i>		15

Most of the business' expenditures are spent within Seminole County.

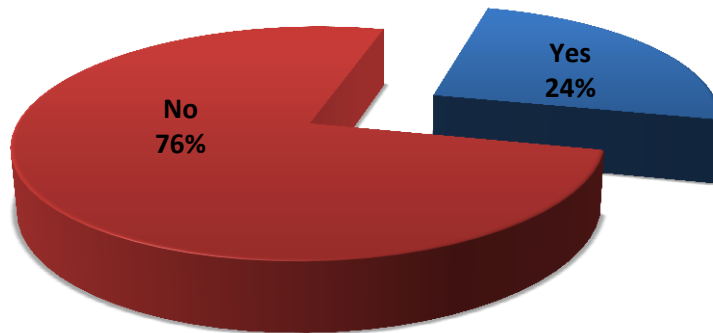


Do you offer shipping services for customer's purchases?

Answer Options	Response Percent	Response Count
Yes	24.4%	11
No	75.6%	34
<i>answered question</i>		45
<i>skipped question</i>		6

Over 75% of the businesses surveyed do not offer shipping services to their customers. This most likely is due to the fact that 60% of the surveyed businesses are restaurants/eateries.

Do you offer shipping services for customers purchases?



Has your business linked with VisitFlorida.com?

Answer Options	Response Percent	Response Count
Yes	7.0%	3
No	93.0%	40
<i>answered question</i>		43
<i>skipped question</i>		8

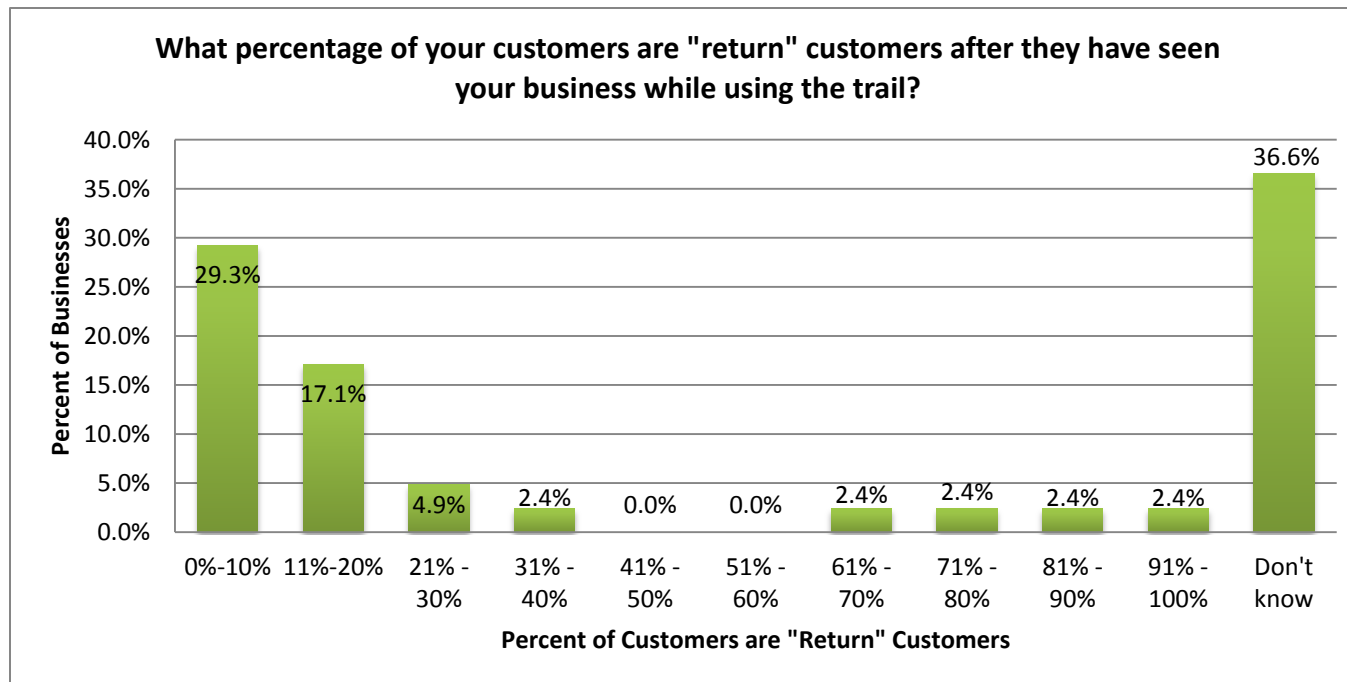
93% of businesses have not linked with VisitFlorida.com. This is a great opportunity for local businesses to link up to the state's tourism website.



What percentage of your customers are "return" customers after they have seen your business while using the trail?

Answer Options	Response Percent	Response Count
0%-10%	29.3%	12
11%-20%	17.1%	7
21% - 30%	4.9%	2
31% - 40%	2.4%	1
41% - 50%	0.0%	0
51% - 60%	0.0%	0
61% - 70%	2.4%	1
71% - 80%	2.4%	1
81% - 90%	2.4%	1
91% - 100%	2.4%	1
Don't know	36.6%	15
	<i>answered question</i>	41
	<i>skipped question</i>	10

The majority of those surveyed "don't know" what percent of their customers return after they have seen the business while using the trail. This also presents an opportunity to strengthen the relationship between the business owner and customers. With simple dialogue or a small survey, the business can decipher additional characteristics and behaviors about their customers.

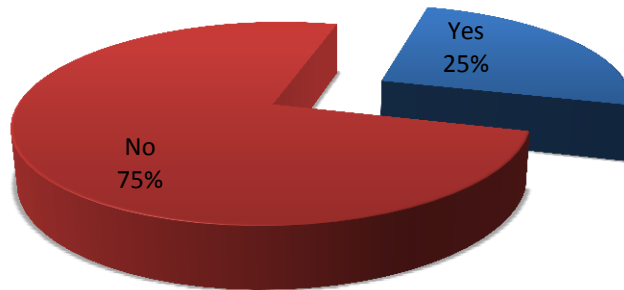


Would you be willing to have a voluntary survey available to your customers to determine the answer to the previous questions?

Answer Options	Response Percent	Response Count
Yes	25.0%	18
No	75.0%	25
	<i>answered question</i>	43
	<i>skipped question</i>	8

75% of those surveyed would NOT be willing to have a survey available to their customers to determine the answer to the previous question. Reasoning for this was not explained.

Would you be willing to have a voluntary survey available to your customers to determine the answer to the previous questions?

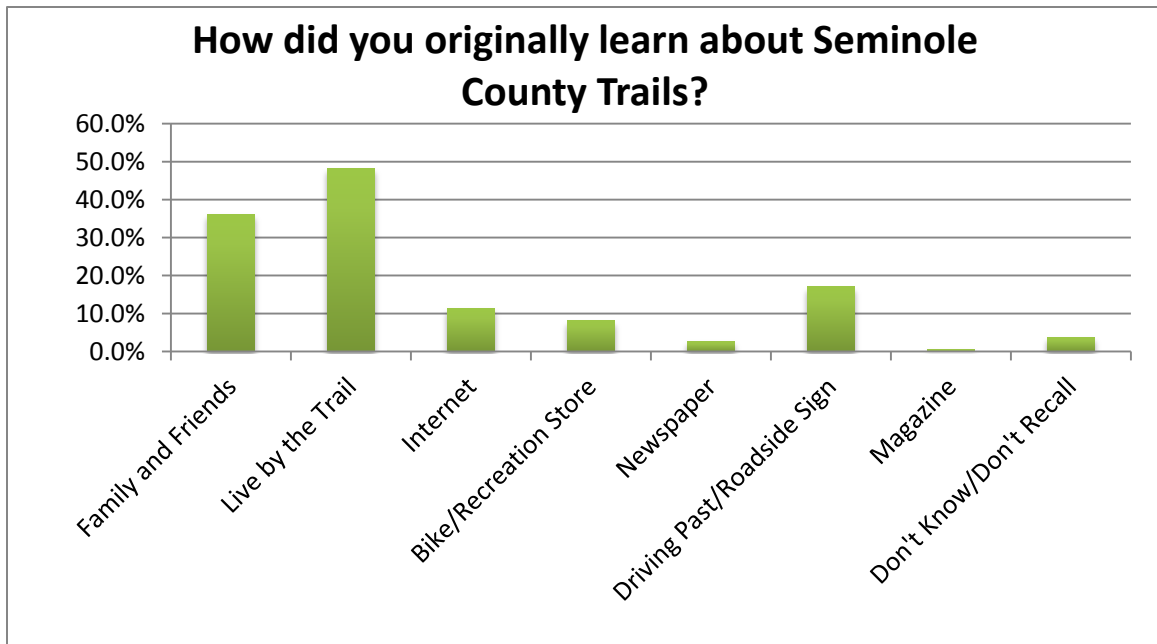


APPENDIX B

How did you originally learn about Seminole County Trails?

Answer Options	Response Percent	Response Count
Family and Friends	36.0%	125
Live by the Trail	48.1%	167
Internet	11.2%	39
Bike/Recreation Store	8.1%	28
Newspaper	2.6%	9
Driving Past/Roadside Sign	17.0%	59
Magazine	0.6%	2
Don't Know/Don't Recall	3.7%	13
<i>answered question</i>		347
<i>skipped question</i>		0

Nearly 50% of those surveyed learned about the trail because they live(d) in its vicinity. Word of mouth is a great free marketing strategy as 36% learned about the trail through friends/family.

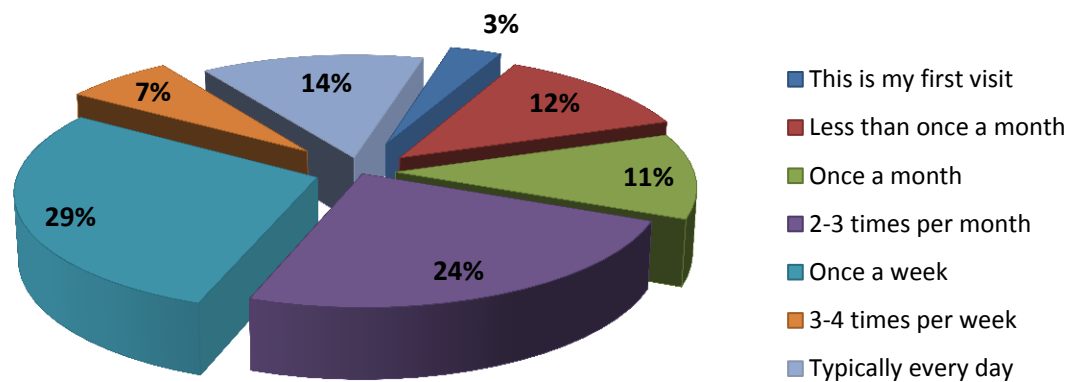


How often do you visit Seminole County Trails (Cross Seminole, Seminole Wekiva, Flagler, Sanford Riverwalk)?

Answer Options	Response Percent	Response Count
This is my first visit	3.2%	11
Less than once a month	12.4%	43
Once a month	11.5%	40
2-3 times per month	24.2%	84
Once a week	28.5%	99
3-4 times per week	6.6%	23
Typically every day	13.5%	47
<i>answered question</i>		347
<i>skipped question</i>		0

The majority of those surveyed use the trail about once a week, followed by 2-3 times per month. Even though surveying took place during both weekdays and weekends, the data does not indicate overwhelming that weekends or weekdays are more popular.

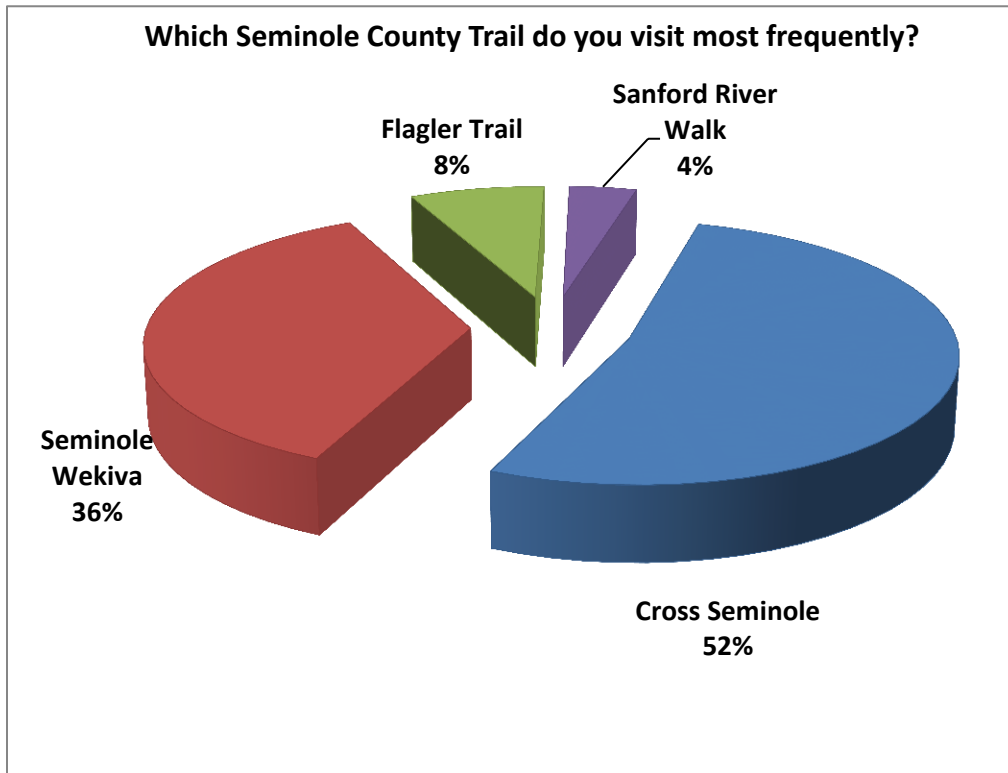
How often do you visit Seminole County Trails (Cross Seminole, Seminole Wekiva, Flagler, Sanford Riverwalk)?



Which Seminole County Trail do you visit most frequently?

Answer Options	Response Percent	Response Count
Cross Seminole	52.5%	181
Seminole Wekiva	36.2%	125
Flagler Trail	7.5%	26
Sanford River Walk	3.8%	13
	<i>answered question</i>	345
	<i>skipped question</i>	2

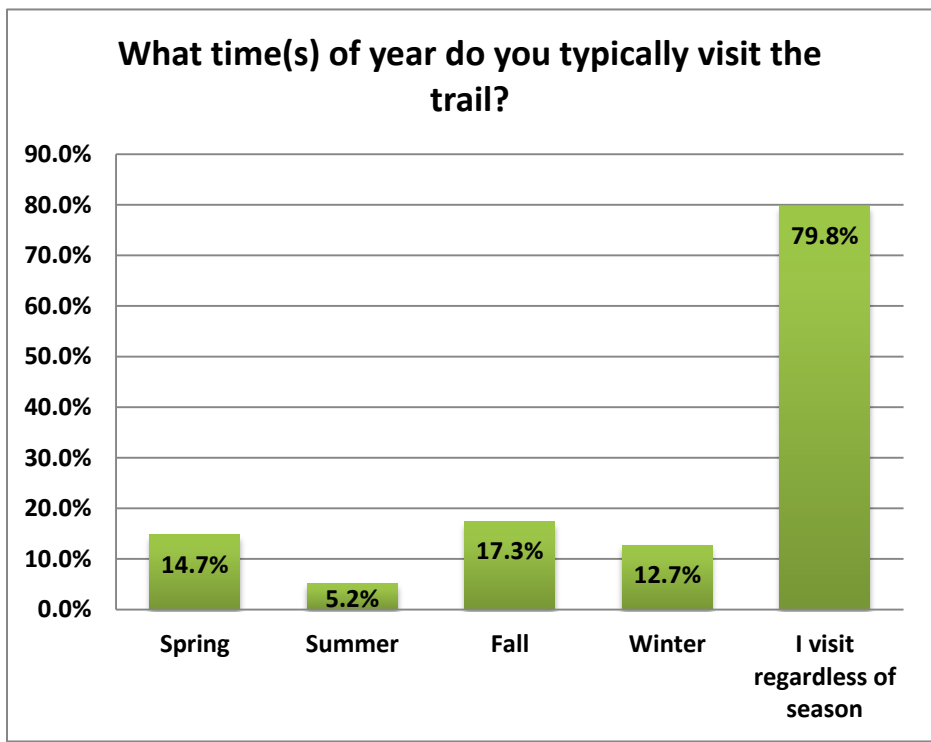
Over half of those surveyed use the Cross Seminole Trail most frequently followed by the Seminole Wekiva. Note, however, more surveys were able to be obtained on the Cross Seminole Trail. This may be due to the difference in usage rates.



What time(s) of year do you typically visit the trail?

Answer Options	Response Percent	Response Count
Spring	14.7%	51
Summer	5.2%	18
Fall	17.3%	60
Winter	12.7%	44
I visit regardless of season	79.8%	276
<i>answered question</i>		346
<i>skipped question</i>		1

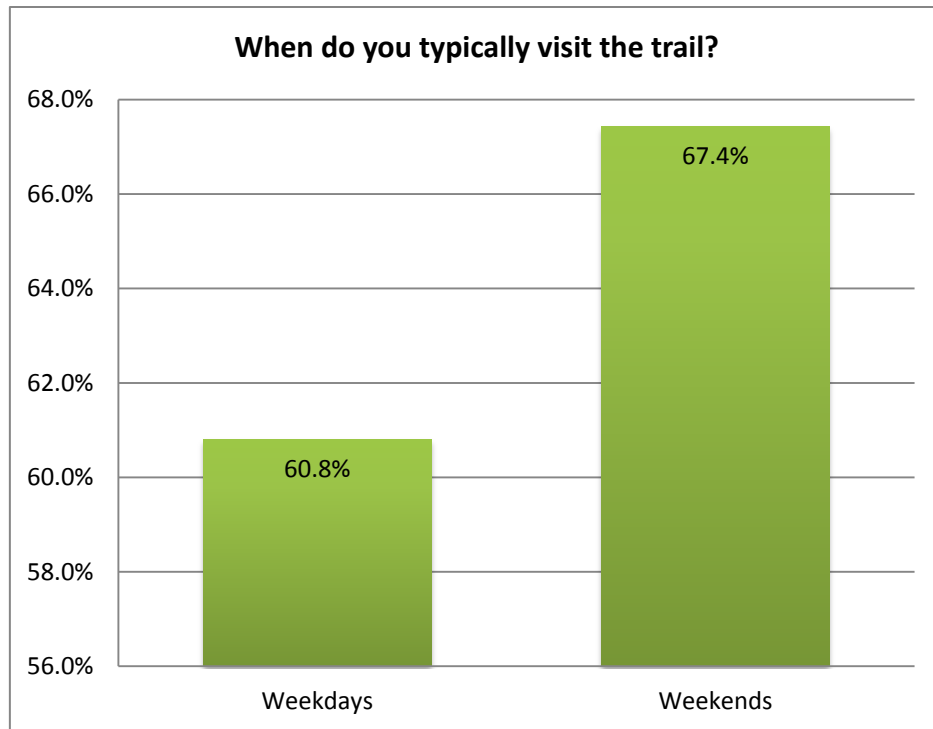
Trail usage for those surveyed is not relative to the season as almost 80% of those surveyed stated that they use the trails regardless of season.



When do you typically visit the trail?

Answer Options	Response Percent	Response Count
Weekdays	60.8%	211
Weekends	67.4%	234
<i>answered question</i>		347
<i>skipped question</i>		0

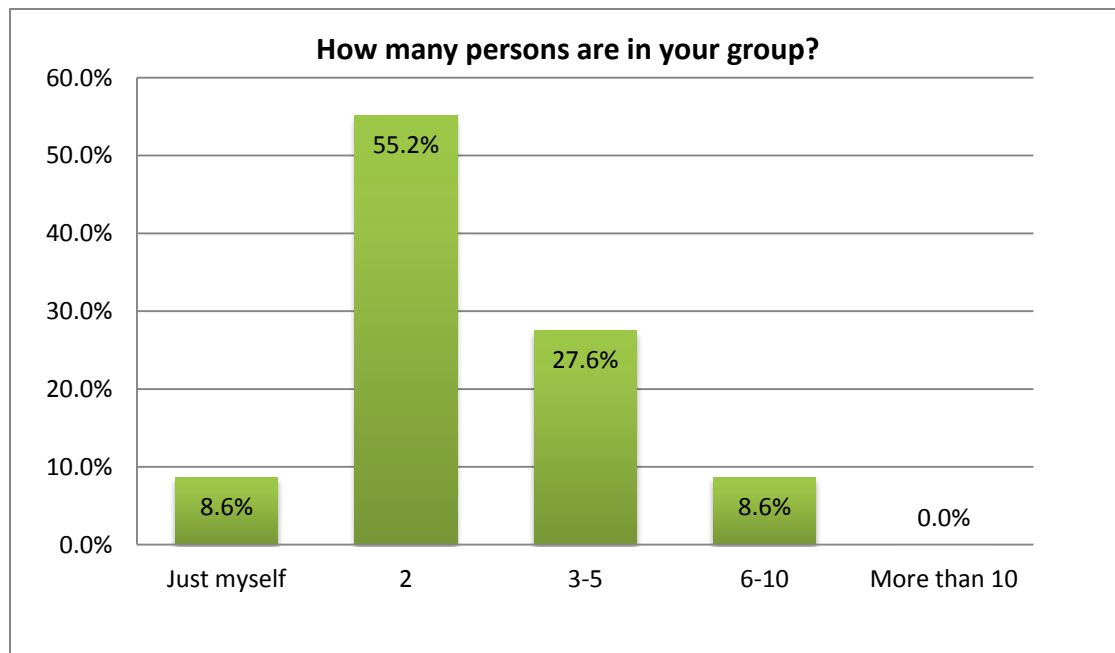
As some surveyed trail users indicated that they typically visit the trail both weekdays or weekends, the percentages are over 100% combined. The data suggests that slightly more visitors use the trail on weekends, but a comparable number use the trail on both weekends and weekdays.



How many persons are in your group?

Answer Options	Response Percent	Response Count
Just myself	8.6%	5
2	55.2%	32
3-5	27.6%	16
6-10	8.6%	5
More than 10	0.0%	0
<i>answered question</i>		58
<i>skipped question</i>		36

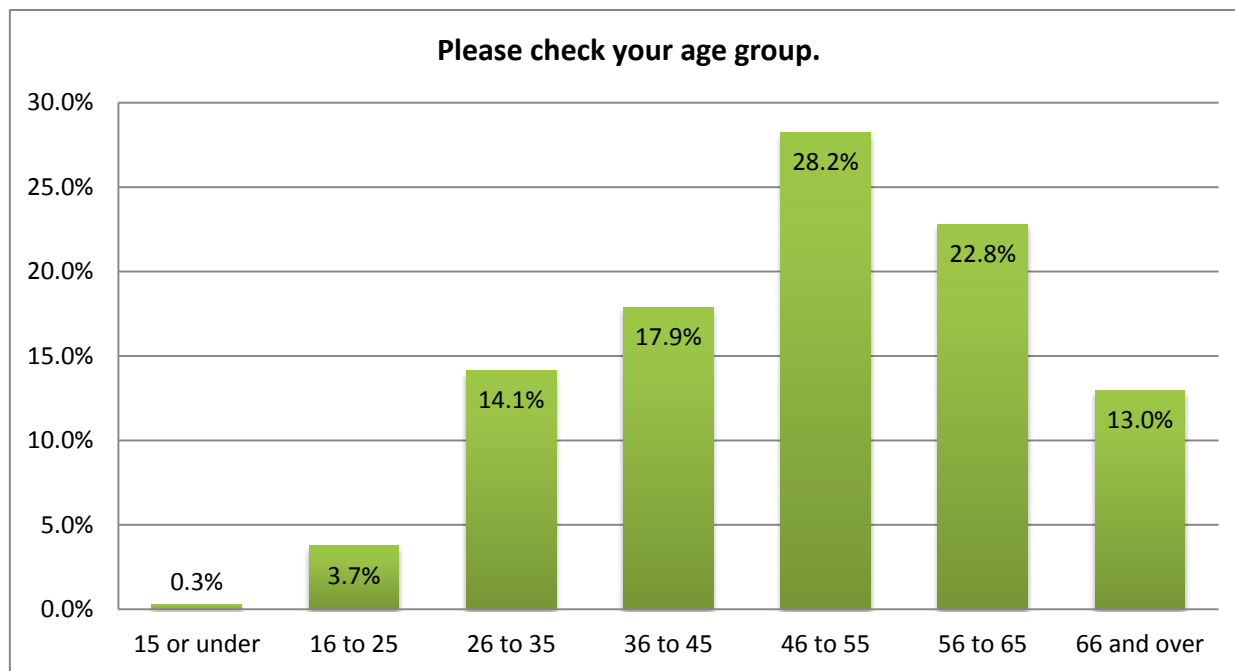
Over 55% of those surveyed visited the trail in groups of 2, followed by groups of 3-5 at 27%.



Please check your age group.

Answer Options	Response Percent	Response Count
15 or under	0.3%	1
16 to 25	3.7%	13
26 to 35	14.1%	49
36 to 45	17.9%	62
46 to 55	28.2%	98
56 to 65	22.8%	79
66 and over	13.0%	45
<i>answered question</i>		347
<i>skipped question</i>		0

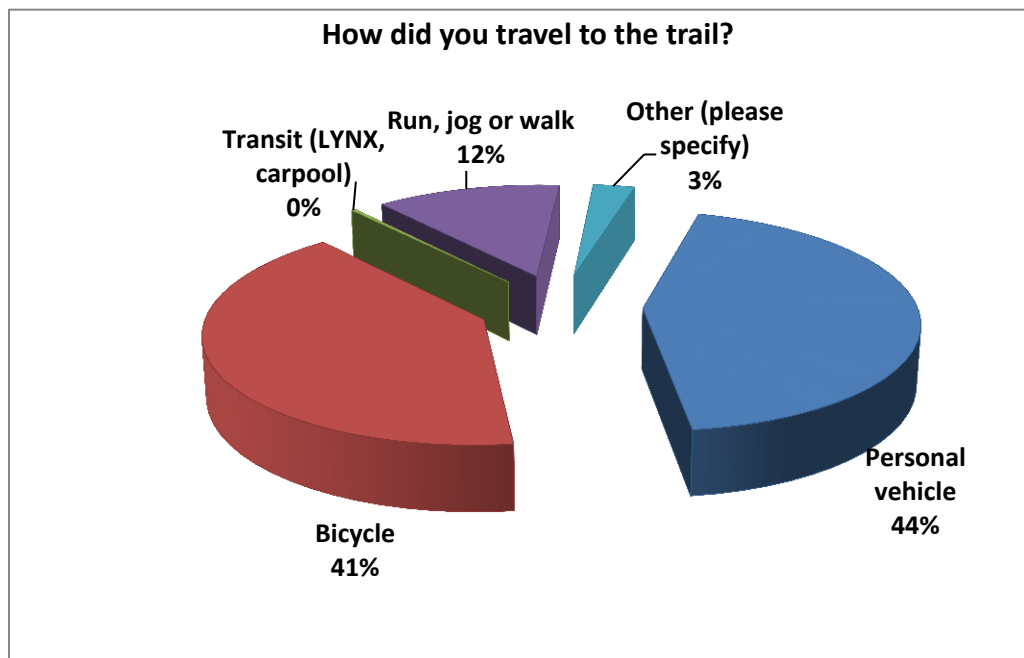
64% of those surveyed indicated they are over 45 years of age. This represents the target users for potential marketing for the trail and businesses located along the trail.



How did you travel to the trail?

Answer Options	Response Percent	Response Count
Personal vehicle	45.1%	156
Bicycle	41.9%	145
Transit (LYNX, carpool)	0.3%	1
Run, jog or walk	12.7%	44
Other (please specify)	2.9%	10
<i>answered question</i>		346
<i>skipped question</i>		1

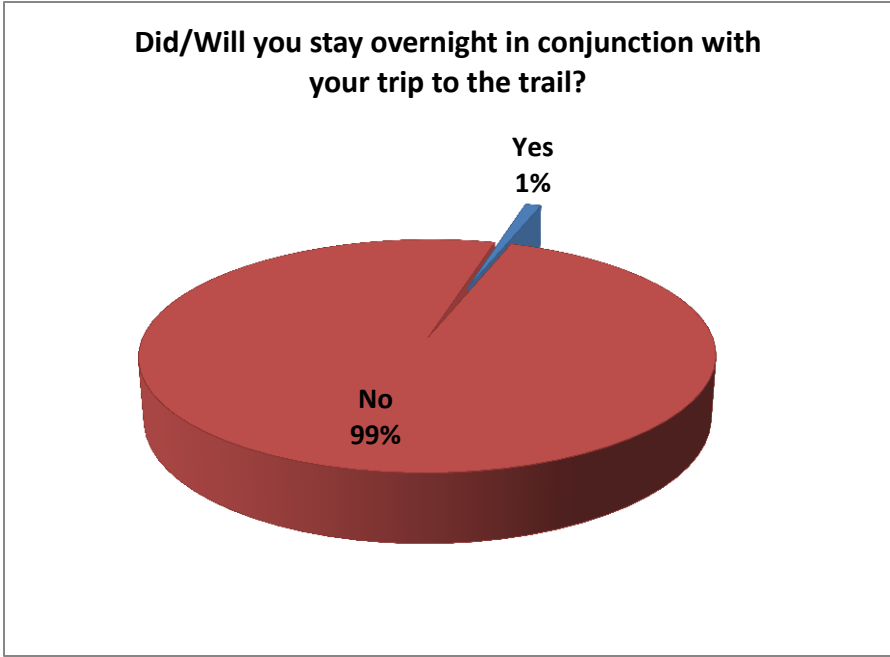
Although personal vehicle was the main source of transportation to the trail for those surveyed, the response percent of bicycle use is comparable. This may be due to the wide implementation and connectivity of bike lanes, neighborhoods and trails throughout the County. Continued connection to neighborhoods through side paths, sidewalks and bike lanes may decrease the use of personal vehicles to trail heads.



Did/Will you stay overnight in conjunction with your trip to the trail?

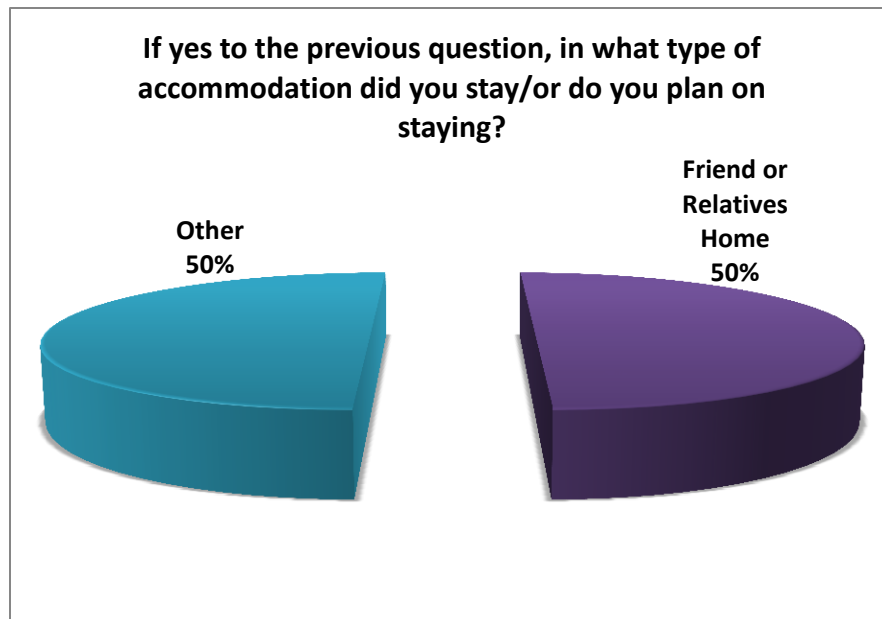
Answer Options	Response Percent	Response Count
Yes	1.1%	1
No	98.9%	91
<i>answered question</i>		92
<i>skipped question</i>		2

Although a number of hotels are located along the trail, only 1 surveyed user indicated an overnight stay in conjunction with their trip to the trail. However, this visitor indicated their lodging was at a friend's/family home and other. (Note a disparity between this response the next response.)



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

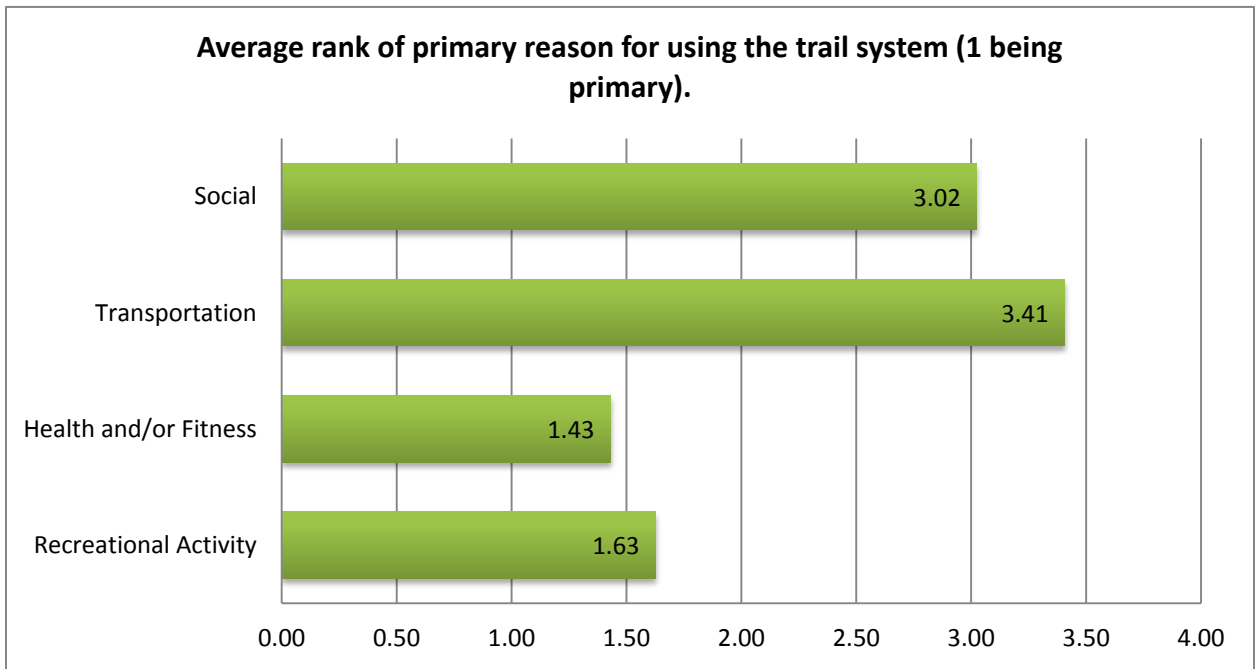
Answer Options	Response Percent	Response Count
Campground	0.0%	0
Motel/Hotel	0.0%	0
Bed and Breakfast	0.0%	0
Friend or Relatives Home	50.0%	1
Other	50.0%	1
<i>answered question</i>		2
<i>skipped question</i>		92



Rank your primary reason for using the trail system (1 being the primary reason)?

Answer Options	1	2	3	4	Rating Average	Response Count
Recreational Activity	125	109	22	6	1.63	266
Health and/or Fitness	183	94	12	6	1.43	301
Transportation	13	9	42	103	3.41	167
Social	9	30	107	56	3.02	203
answered question						346
skipped question						1

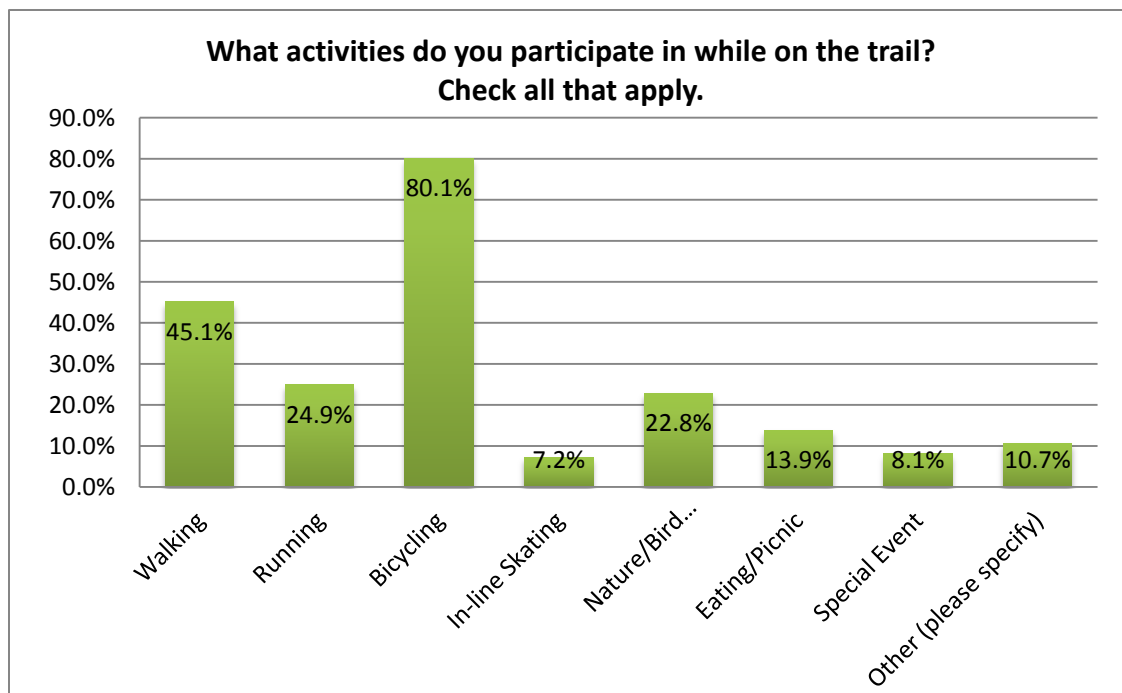
Health and Fitness was ranked as the number one reason for using the Seminole County Trail System. Recreational activity followed as #2, than social and transportation rounded out the bottom reason for trail usage.



What activities do you participate in while on the trail? Check all that apply.

Answer Options	Response Percent	Response Count
Walking	45.1%	156
Running	24.9%	86
Bicycling	80.1%	277
In-line Skating	7.2%	25
Nature/Bird Watching	22.8%	79
Eating/Picnic	13.9%	48
Special Event	8.1%	28
Other (please specify)	10.7%	37
answered question		346
skipped question		1

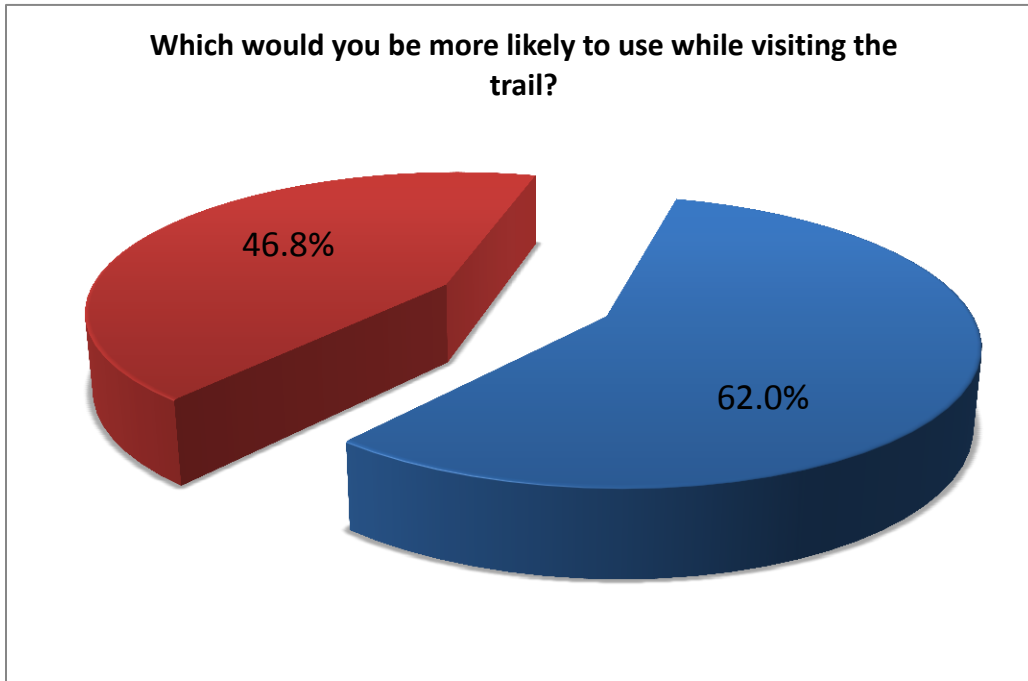
80% of those surveyed bicycle while on the trail, followed by walking at 45%. Those who indicated "Other" overwhelmingly stated that they participate in equestrian activities while on the trail. Due to the ability to indicate as many activities as they participate in while using the trail system, the percentages sum to over 100%.



Which would you be more likely to use while visiting the trail?

Answer Options	Response Percent	Response Count
Local vendor list and map	62.0%	49
Coupons from local vendors	46.8%	37
<i>answered question</i>		79
<i>skipped question</i>		15

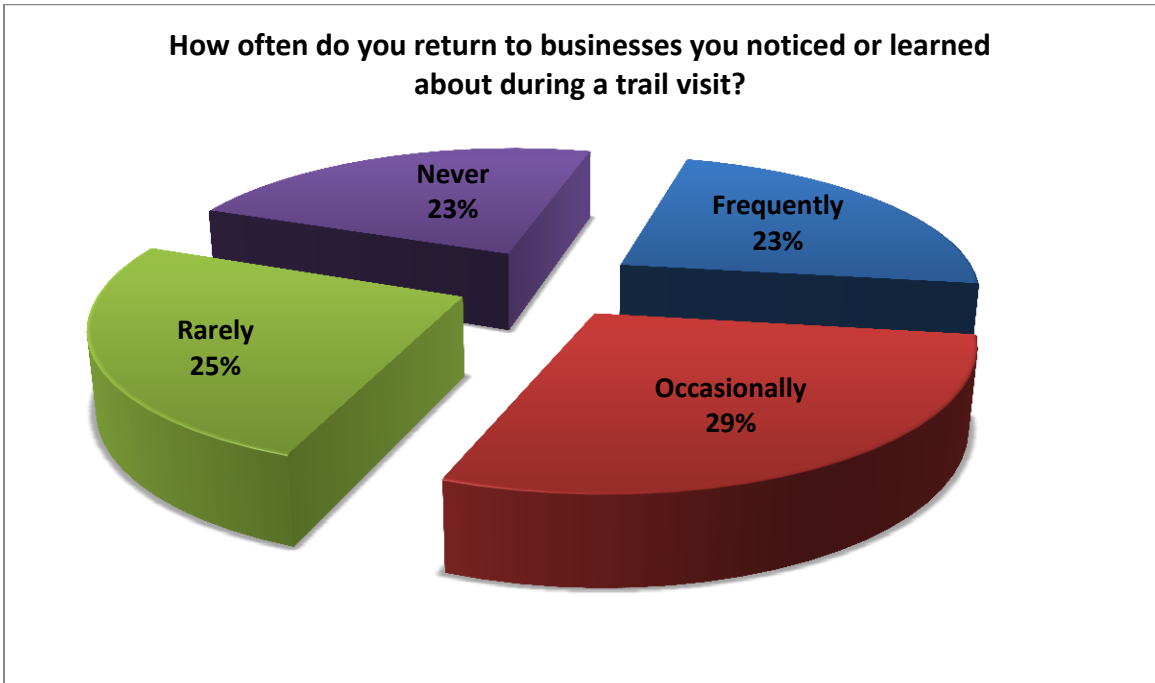
The majority of users noted they would be more likely to use a map of the trail indicating where various trail related businesses and restaurants, trail heads, and facilities are located. Some of the responders who skipped the question indicated that they would not use either the map or the coupons.



How often do you return to businesses you noticed or learned about during a trail visit?

Answer Options	Response Percent	Response Count
Frequently	23.1%	21
Occasionally	28.6%	26
Rarely	25.3%	23
Never	23.1%	21
<i>answered question</i>		91
<i>skipped question</i>		3

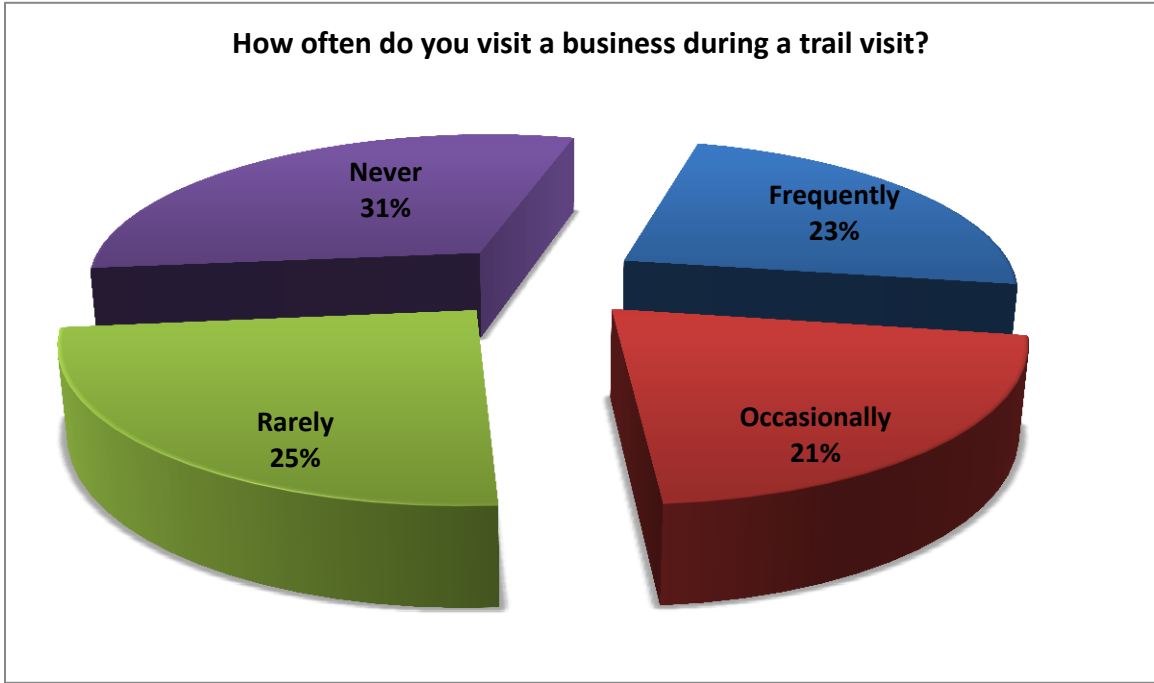
There were no significant findings in whether visitors frequented businesses they learned about on the trail. The response was closely spread between all the answers. "Occasionally" received the highest response at 28.6%. Comments to this question indicated that many trail users don't notice businesses while using the trail.



How often do you visit a business during a trail visit?

Answer Options	Response Percent	Response Count
Frequently	23.7%	22
Occasionally	21.5%	20
Rarely	24.7%	23
Never	31.2%	29
<i>answered question</i>		93
<i>skipped question</i>		1

As with the previous question, similar percentages were noted by respondents as to how often they visit a business during a trail visit. "Never" received 31.2% of the responses.

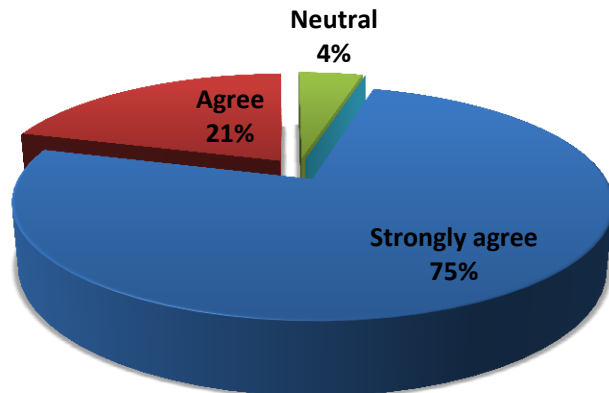


To what level do you agree with the following statement:
 "The Seminole County Trail System greatly impacts the
 quality of life in the County".

Answer Options	Response Percent	Response Count
Strongly agree	75.3%	70
Agree	20.4%	19
Neutral	4.3%	4
Disagree	0.0%	0
Strongly disagree	0.0%	0
<i>answered question</i>		93
<i>skipped question</i>		1

Over 75% of those surveyed "Strongly Agree" that the Seminole County Trail System greatly impacts the quality of life in the County. Only 4.3% indicated a neutral response. One of these responders stated that he is not from the County and therefore responded neutral.

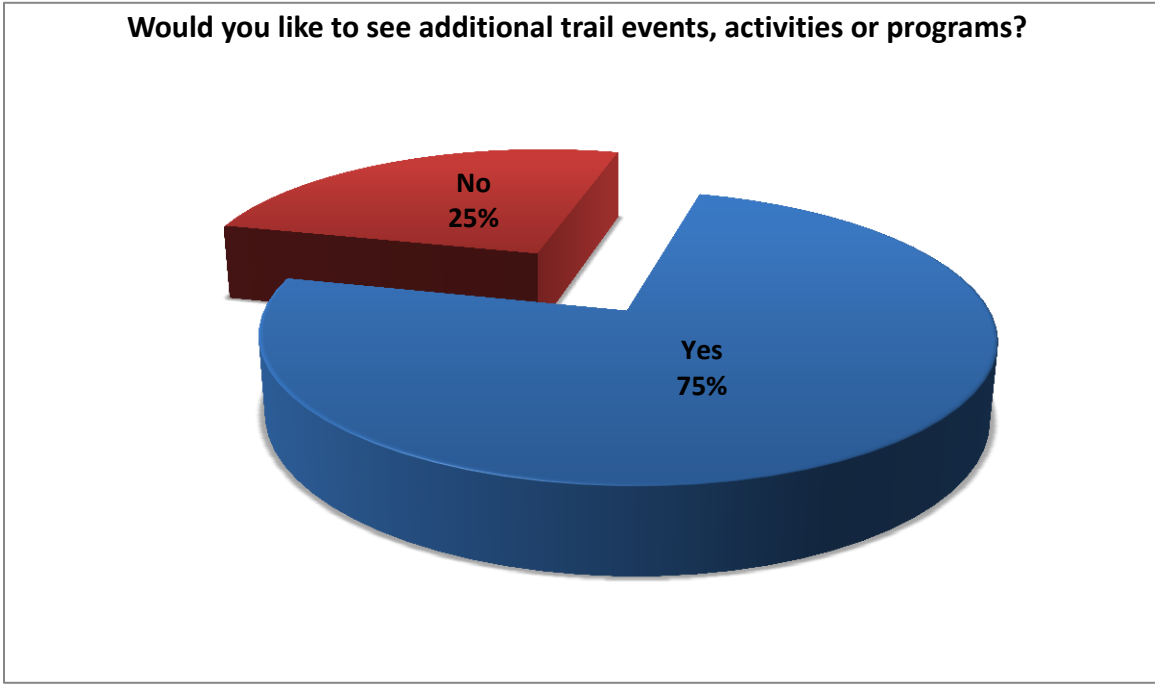
To what level do you agree with the following statement: "The Seminole County Trail System greatly impacts the quality of life in the County. "



Would you like to see additional trail events, activities or programs?

Answer Options	Response Percent	Response Count
Yes	74.6%	259
No	25.4%	88
<i>answered question</i>		347
<i>skipped question</i>		0

The majority of respondents indicated they would like to see trail events, activities and programs. Some respondents suggested children oriented programs while others suggested businesses oriented events.

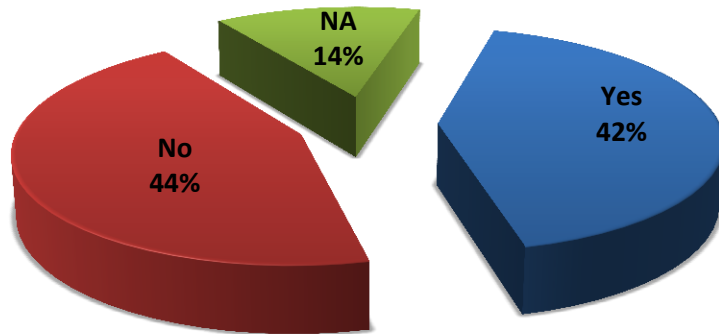


If applicable, did you know you were on part of the Florida National Scenic Trail?

Answer Options	Response Percent	Response Count
Yes	42.0%	37
No	44.3%	39
NA	13.6%	12
<i>answered question</i>		88
<i>skipped question</i>		6

As the majority of respondents noted that they did not know they were on the FNST, additional markings and marketing may make users more aware of the significance of the trail and its route through Seminole County.

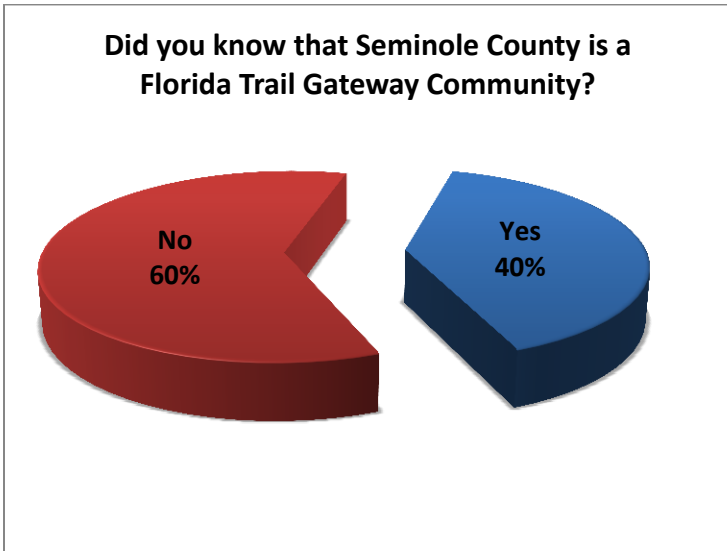
If applicable, did you know you were on part of the Florida National Scenic Trail?



Did you know that Seminole County is a Florida Trail Gateway Community?

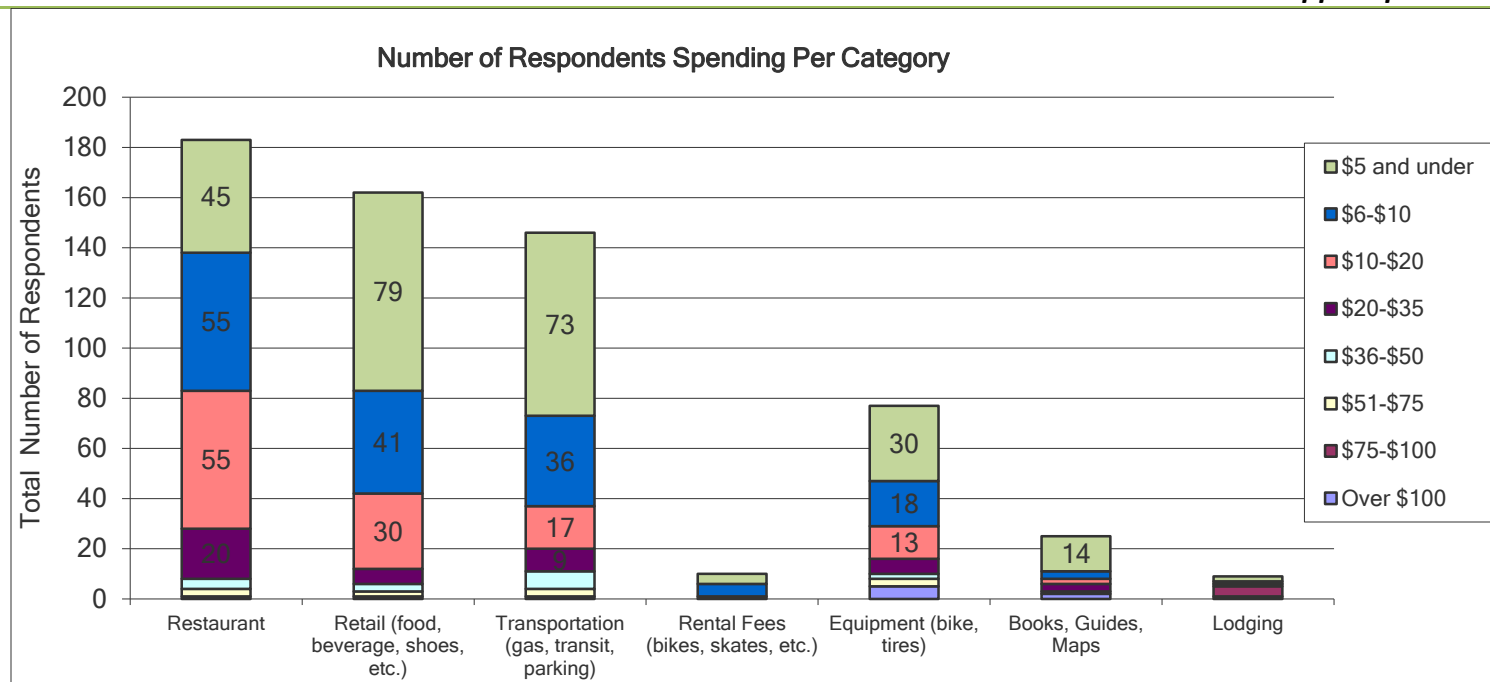
Answer Options	Response Percent	Response Count
Yes	39.8%	138
No	60.2%	209
Other	0.9%	3
answered question		347
skipped question		0

The marketing of the honor and benefits of Seminole County being a Florida Trail Gateway Community, relevant to the responses to the survey question, should coincide with trail and ecotourism marketing efforts. Educating residents of this fact may take place through logos and incorporating the Gateway Community concept into Seminole County’s identity.

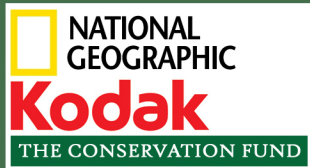


Please indicate the average amount of money you spend during a typical trail visit in each category listed below.

Answer Options	\$5 and under	\$6-\$10	\$10-\$20	\$20-\$35	\$36-\$50	\$51-\$75	\$75-\$100	Over \$100	Response Count
Restaurant	45	55	55	20	4	3	0	1	183
Retail (food, beverage, shoes, etc.)	79	41	30	6	3	2	0	1	162
Transportation (gas, transit, parking)	73	36	17	9	7	3	0	1	146
Rental Fees (bikes, skates, etc.)	4	5	0	1	0	0	0	0	10
Equipment (bike, tires)	30	18	13	6	2	3	0	5	77
Books, Guides, Maps	14	3	2	3	1	0	0	2	25
Lodging	2	0	0	0	1	1	4	1	9
answered question									347
skipped question									0



Most respondents noted they spend money at restaurants in conjunction with a trail visit. Retail (food, beverage, shoes, etc) followed. While the average trail users spend, on average, \$15 per trail visit, this money is also largely spent in the restaurant category.



March 2012