



Executive Summary Survey Analysis

Explore Park Master Plan - Community Survey (Sep.-Oct. 2015)

The following five pages contain a question by question overview of survey results as part of the community feedback for Explore Park's master plan. The survey was open from September 20, 2015 through October 31, 2015, and collected a total of 1,137 responses.

Survey Sample

- This survey contained a fairly representative sample of the Roanoke Valley, crossing many age ranges.
- Gender breakdown was approximately 50% male and 50% female
- The top zip code sampled came from the Cave Spring area (24018), which also accounted for the highest percentage surveyed based on zip code population.
- Half of those surveyed were Roanoke County residents, while the others came mostly from neighboring municipalities.
- Nearly half of those surveyed had children in the household, with the largest group of children being in the 11-15 year old age group.

Broad Category - Desired Experiences

- When asked to rank broad categories of park attributes, respondents scored terms such as "recreation" and "adventure" higher than "relaxation" and "education." Survey responses favored active park uses over passive ones.
- Beauty also ranked very highly in the survey, serving as a reminder in planning to preserve the natural landscape.
- In ranking broad categories of activities, the top ranking result was "adventure tourism," which was scored as #1 by 40% of all respondents for that activity.

Specific Amenity Rankings

- When asked to rank each amenity in a list, the top results involved better accessing the wooded and river areas of the park through low-impact infrastructure. This includes such amenities as hiking trails, river walk, canoe/kayak launch, observation areas, picnic areas, campsites and biking trails.
- Survey responses reflect Roanoke County's goal to design a park for the top 90% usage.
- Amenities with the highest rankings in this area were basic activities that are typically free to participate in. Where a fee typically applies, the top results were campsites, cabins and zip lines / aerial park.

Written Responses

Respondents were given several opportunities in the survey to provide free-response written suggestions for what types of attractions they would like to see, or bring guests to see at Explore Park. Staff compiled 3240 like suggestions and ordered their frequency of appearance in the survey results. The top results were:

- Zip lines / aerial park
- Hiking or dirt trails
- Bike trails or bike park
- Camping

Needs Not Being Addressed

- When asked which needs were not being addressed through other local parks, the top three responses were high adventure activities, campgrounds, and river access.
- These three amenities/activities had a significantly higher response than other selections in the category, indicating respondents saw a clear need for them in our region.



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Survey Analysis by Question

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Question 1 – How often have you visited Explore Park

About 81% of survey respondents have visited Explore Park in the past, and of those, 58% of them have visited at least occasionally within the past few years.

This shows that a majority of those surveyed are familiar with the park. However 42% have not visited within 3 years or at all which presents a marketing opportunity to increase local visitor numbers.

Question 2 – What was the purpose of your visit (if within last 3 years)

About 80% of recent visitors came to the park for outdoor recreation, 20% for public events such as races, 12% for educational programs such as guided hikes and camps, and 5% for private special events such as wedding rentals.

This appropriately reflects the current programmatic makeup of the park.

Question 3 – Rank top desired experiences and attributes

Ranked in order of compiled scoring, survey respondents prioritize their park experience in the following order:

- 1) Recreation
- 2) Beauty
- 3) Adventure
- 4) Cleanliness
- 5) Relaxation
- 6) Safety
- 7) Accessibility
- 8) Education
- 9) Health

A key point to notice is that the terms "recreation" and "adventure" scored higher than "education" and "relaxation." This indicates that survey respondents favored active uses for the park over passive ones. It is also important to note that "beauty" ranked number two, which is a reminder in planning to preserve the natural landscape.

Question 4 – How often do you participate in outdoor recreation activities?

Of the 1,128 responses, only 2.75% say they rarely or never participated in outdoor recreation activities. Only 7.09% ranked their participation as once or twice a year. In total less than 10% of respondents were not active in the outdoors.

This is an indication that the vast majority of survey participants are active and therefore more likely to take advantage of amenities at Explore Park.

Question 5- Rank your interest in types of activities

Ranked in order of compiled scoring, survey respondents prioritize their park experience in the following order:

- 1) Adventure Tourism
- 2) Equipment Rental
- 3) Special Events
- 4) Overnight Accommodation & Programs (tied)
- 5) Retail
- 6) Facility Rentals

Adventure tourism not only came in number one in the overall score, but was scored as #1 by 40% of all respondents for that amenity. This shows a strong desire for active recreation among survey respondents. Rankings between the top 5 were fairly close, with the only clear bottom score coming from facility rentals. That can be explained by the more niche audience of weddings and corporate retreats.



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Question 6 – Rate your interest in the listed amenities:

TOP weighted scoring averages are as follows:

- 1) Hiking Trails
- 2) River Walk
- 3) Canoe/Kayak Launch
- 4) Observation/Overlooks
- 5) Picnic Area
- 6) Campsites
- 7) Biking Trails

BOTTOM weighted scoring averages are:

- 1) Disc Golf
- 2) RV Camping
- 3) Public Art
- 4) Water Spray Feature / Splash Park

This information reflects our goal to design a park for the top 90% usage. Amenities with the highest rankings on this question are basic activities that are typically free to participate in.

Ordered average weight ranking of activities where a FEE typically applies:

- 1) Campsites
- 2) Cabins
- 3) Ziplines/ aerial park
- 4) Lodge
- 5) Water Spray Feature / Splash Park
- 6) RV Camping

Ordering the information in this way may be helpful in prioritizing the build out of pay for service amenities.

Question 7 – What type of attraction would YOU most like to see? (Free response)

From the written responses, staff compiled 1490 like suggestions and ordered their frequency of appearance in the survey results (full list attached). Results are as follows:

Tier 1: 100 or more appearances

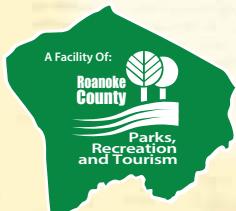
- 1) Zipline/ aerial park
- 2) Bike Trails or bike park
- 3) Hiking trails or dirt trails

Tier 2: 51 to 100 or more appearances

- 1) Tent camping (or just "camping" with no indication of type)
- 2) Equestrian Trails
- 3) Disc Golf
- 4) History or heritage display

Tier 3 – 30 to 50 appearances

- 1) Dining – Restaurant
- 2) Water park or spray features
- 3) Adventure Programs
- 4) RV park
- 5) River access
- 6) Canoeing or Kayaking
- 7) Brewery
- 8) Cabin Camping
- 9) Riverwalk
- 10) Fishing
- 11) Paved Greenway



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Question 8 -Type of attraction would you bring out of town GUESTS to see? (Free response)

From the written responses, staff compiled 1750 like suggestions and ordered their frequency of appearance in the survey results (full list attached). Results are as follows:

Tier 1: 100 or more appearances

- 1) Zip lines / ropes course
- 2) Hiking trails or dirt trails
- 3) Tent camping (or just "camping" with no indication of type)

Tier 2: 51 to 100 appearances

- 1) Amphitheater
- 2) Bike trails or bike park
- 3) Adventure programs
- 4) Canoe/kayak
- 5) History or heritage
- 6) Cabin camping
- 7) Dining – restaurant
- 8) Water park
- 9) White water park

Tier 3: 30 to 50 appearances

- 1) Disc Golf
- 2) Whitewater park
- 3) History or heritage
- 4) Dining – restaurant
- 5) Water park or spray features
- 6) Adventure programs
- 7) RV park
- 8) River access
- 9) Canoe/kayak
- 10) Brewery
- 11) Cabin camping
- 12) River walk trail
- 13) Fishing
- 14) Greenway or paved trail

Question 7 & 8 Observations

An interesting point to examine here is what changed between question 7 and question 8, by shifting the focus of the question from "your family" to "your guests". Here are a few things we noticed:

- Zip lines & trails are at the top of both categories, indicating locals believe both they and visitors would use them.
- Amphitheater moved much higher in rankings between 7 & 8, indicating people think outside guests would use the facility, but may not choose to visit themselves.
- Tent and cabin camping increased in ranking between 7 & 8, while showing strength in both categories. This indicates locals see themselves using these facilities, and believe that visitors would use them even more.
- Equestrian trails are listed high in the local use question, but fall below the top rankings in the visitor use question. This indicates locals would like to use the facility for themselves, but don't necessarily envision outsiders bringing horses here just for the trails.
- Disc Golfranked well in both questions 7 & 8, after receiving the LOWEST weighted score in question 6. This may be an indication of the passion of that user group, as they have very specific desires for the park to express here in writing. The group could be strong advocates in development of this resource.



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Question 9 – Needs NOT being addressed through other local parks

Ranked in order of weighted scoring, survey respondents chose the listed amenities in the following order of need:

- 1) High adventure activities 55%
- 2) Campgrounds 53%
- 3) River Access 52%
- 4) Trails (dirt) 39%
- 5) Open space (wooded) 28%
- 6) Education/interpretation programs 26%
- 7) Cultural Events 24%
- 8) Trails Paved 22%
- 9) Open Space (field), picnic areas and play areas for children (tie) – 15-16%
- 10) Health 9%

The top three needs in this category had significantly higher responses than the other selections, indicating respondents saw a clear need for high adventure activities, campgrounds and river access not being met in this area.

Question 10 – Other Helpful Feedback

This question, as well as other areas of the survey, allowed unrestricted feedback for public record. Frequent topics listed here were connecting the Roanoke River greenway, boosting Roanoke's outdoor image, and many specific suggestions for comparison. A list of examples can be found on the written comments summary attachment.

Question 11 – What is Your Age?

40% of those surveyed were age 31 to 40, 27% were age 51 to 65 and 14% were age 18 to 30.

This is a fairly good sample crossing many age ranges.

Question 12 – What is your Gender

50% male / 48% female

We were lucky to get a very even split of responses, which is unusual because many surveys tend to skew female.

Question 13 – Where do you live?

Nearly half of respondents, 48% were Roanoke County residents. Others came from nearby municipalities.

This reflects a strong desire by residents to weigh in on the development of a County facility.

Question 14 – Zip codes

Here are the top 7 zip codes surveyed.

ZIP	SURVEYED	POPULATION	PERCENTAGE OF POP
24018	234	28000	0.84%
24153	115	35523	0.32%
24015	100	15418	0.65%
24019	98	24713	0.40%
24014	90	22476	0.40%
24179	80	17495	0.46%
24012	56	27218	0.21%

A heat map is available here.

https://www.google.com/fusiontables/DataSource?docid=1K7bWMLk3N8bfBsIrP88AV_1d8wVEyoEoqMkce7UY

The southwest Roanoke area (24018, 24015) contained among the highest survey response and percentage of total population responding. As a general rule, these areas of our community have a higher income and younger age demographics. This is a good preview of a strong future market segment.



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Question 15 – How far do you have to travel?

The large majority of respondents indicated travel time to the park to be 40 minutes or less. Only 10% described their trip as more than 40 minutes.

This question measures perception of distance. Destinations with travel time of more than 40 minutes are typically perceived to be further away and visited less frequently. Most respondents likely view the park as an easy afternoon trip from their homes.

Question 16 – What are the ages of children in your household?

51% of respondents claimed NO children in household, while 49% claimed children of various ages. Of those with children, the largest group was 11-15 year old teenagers, followed by grade school age, and finally preschool age. *The good news is that we received a good sample including an even mix of those with children and those without. A concerning note here is that there are fewer "gradeschool" youth than "teen youth". Judging by local school enrollment numbers this is an accurate reflection of what is happening in our community. It is possibly an indication that a purely "family" programming approach should only be part of the focus and a multi-generational approach might make more sense as that the number of young families may be declining.*



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