

Heritage Rail Trail County Park 2017 User Survey And Economic Impact Analysis



# Recreation and Parks Technical Assistance Program Final Report Heritage Rail Trail County Park 2017 User Survey And Economic Impact Analysis

Funded in part by the Pennsylvania Recreation and Park Society and a grant from the Environmental Stewardship Fund under the administration of the Pennsylvania Department of Conservation and Natural Resources, Bureau of Recreation and Conservation

#### **November 2017**

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### **Executive Summary**



This report was made possible through a technical assistance program of the Pennsylvania Recreation and Park Society, supported by a grant from the Environmental Stewardship Fund under the administration of the Pennsylvania Department of Conservation and Natural Resources, Bureau of Recreation and Conservation.

Heritage Rail Trail County Park (HRTCP) is a 21.5-mile, multi-use rail trail that passes through eleven municipalities as it traverses north to south through south central Pennsylvania's County of York. The rail trail extends from the City of York's historic district to the Pennsylvania/Maryland state line (the historic Mason Dixon Line) just south of New Freedom Borough. Here it makes a seamless connection to Maryland's Torrey C. Brown Trail (previously named the NCR Trail) and continues for an additional 21 miles. While much of the Heritage Rail Trail lies within the County-owned corridor that also contains the tracks of the Northern Central Railroad, the rails no longer exist along the Maryland trail.

The Northern Extension of the Heritage Rail Trail County Park is currently open for 4.3 miles from John Rudy County Park south to U. S. Route 30. Grades are gentle with some hills; surface is primarily crushed stone with some areas of asphalt. The trail runs along the Codorus Creek and on levees constructed by the U. S. Army Corps of Engineers. The final phases to complete the connection to the Heritage Rail Trail in the City of York are currently in design and engineering. Construction is slated to begin in early 2018. When completed the Northern extension will add approximately 6 miles to the Heritage Rail Trail.

2017 marked the eighteenth anniversary of the opening of the Heritage Rail Trail County Park. The trail has been managed by the York County Department of Parks and Recreation since its completion in August of 1999.

One major change to the trail since the last survey in 2012 is the addition of Steam into History a tourist train that runs on a seasonal basis between New Freedom and Hanover Junction Train Station. Many visitors who come to the area to ride the train see this wonderful rail trail that parallels the tracks and come back to walk or bike on the trail.

This 2017 User Survey and Economic Impact Analysis was preceded by similar studies in 1999, 2001, 2004, 2007 and 2012. Each survey was designed to monitor trail user characteristics and the economic impact of the rail trail. In many ways the 2017 survey was very much like the previous surveys. The methodology for collecting the data was, for the most part, identical in all six surveys. Paper survey forms and collection boxes were made available at all trailheads/parking lots and at the Hanover Junction and New Freedom train stations from May through October. Completed forms could also be faxed or mailed to the York County Parks

headquarters. One additional data collection methodology was utilized for the 2017 survey and that was an online version of the survey was hosted by Survey Monkey.

In 2017, as in 2012, data collection benefited from the installation of infrared counters placed along the rail trail. This study uses a survey methodology and analysis previously tested on Pennsylvania trails and documented in the Rails-to-**Trails Conservancy's Trail User Survey** Workbook (<a href="https://www.railstotrails.org/resources/documents/rresource\_docs/User\_SurveyMethodology.pdf">www.railstotrails.org/resources/documents/rresource\_docs/User\_SurveyMethodology.pdf</a>).

Many of the questions on all six survey forms are identical. However, due to changes in trailheads and the trail itself, as well as the types of information that the York County Department of Parks and Recreation wanted to collect, some questions were changed, deleted or added. Overall, the data from the six studies are very comparable and in the analysis section of this report, where applicable, the data from the six surveys is presented in a comparison analysis.

Analysis of the data accumulated from the infrared counters and the completed surveys received from visitors indicates an estimated 263,856 annual visits to the Heritage Rail Trail County Park, resulting in a total economic impact in 2017 of between \$3.5 and \$4.4 million into the local economy.

In all, 414 completed survey forms are included in the 2017 analysis.

While the majority of trail users reside in York County (75.6%), the trail has attracted users from Maryland (11.7%), Lancaster County (3.2%), Harrisburg metro area (4.9%) and the Philadelphia metro area (2.4%). In addition, visitors from other areas accounted for 2.2% of the survey respondents in the 2017 study.

The ratio of men to women using the trail was 59% male, 41% female. A similar result was found in the previous five studies.

For many of the survey respondents, trail usage is a frequent occurrence. More than 44% of the respondents use the trail several times each week; 33.5% reported visiting once a week or several times per month. Less frequent usage, once per month (6.8%), and a few times a year (10.4%) still point to trail use as a regular activity. First time users accounted for just 5.6% of all respondents, indicating a continued opportunity for growth in visitations.

Approximately 88% of the trail users are over the age of 35, with the most represented age groups being 56-65 (29.4%) and 66 and older (28.2%). Only 12.2% of visitations included children under the age of 15. This age profile has been very consistent over the six user studies and is typical of user age profiles from other trail studies across the country.

Although bicycling remains the predominant form of recreation on the Heritage Rail Trail, the percentage of cyclers is decreasing. 43.3% of respondents indicated that their primary activity on the trail is biking, compared to 54.9 % in 2012. The use of the trail for walking/hiking increased to 27.8% and running/jogging increased since 2012 to 11.3%. Nature study (2.8%) and cross-country skiing (1.1%) both decreased since 2012, and geocaching was reported by 0.7% of visitors and fishing by 1.1% of visitors, both increases over 2012.

Overall, usage of the parking areas is spread out along the rail trail. The New Freedom and Brillhart Station parking lots/trailheads are used most frequently by the survey respondents (13.4% and 19.4% respectively). Hanover Junction was the next most popular parking facility (12.3%).

In 2017, 60.5% of visitors indicated both weekday and weekend usage. Weekday users were 19.8%, and weekend users 19.8%. Survey respondents make a significant time commitment when the venture out on the Heritage Rail Trail. 29% are on the trail for more than 2 hours, and nearly 48% are on the trail for between one and two hours.

**Trail users were asked to "define" their** use of the trail under one of five categories. 61.4% of the survey respondents consider their use of the trail for health and exercise (an increase of over 4% from 2012). Another 6.8% use the trail for fitness training. 28.8% of the respondents consider their use of the trail as recreational.

Also in 2017, visitors were asked to report on any ancillary activities while on the trail. 31% reported bird or wildlife-watching; 11.1% studied wildflowers; 4.6% visited the museums at the train stations; 18.6% read the interpretive signs along the trail.

As in past surveys, respondent's knowledge of the trail came primarily from "word of mouth" (31%). Similarly, road-side signage and simply "driving past" informed 19.7% of the visitors about the trail. The third most important source for information was the York County Parks brochure and its website (16.1%), while other on-line sources provided information to 8.8% of visitors, double the 2012 percentage. York County Convention & Visitors Bureau was reported as the information source for 1.6% of all visitors.

In terms of economic impact, 89% of the survey respondents indicated that they had purchased some form of "hard goods" (defined as bike, bike accessories, auto accessories, running, walking, hiking shoes or clothing) in conjunction with their use of the trail. The average spending of those who provided spending data was \$328.17 on an annual basis, nearly identical to that reported in 2012. Over the six surveys, this figure has not varied more than \$40.00.

The purchase of consumables or "soft goods" (water, soda, candy, ice cream, lunches, etc.) was reported by nearly 69%, identical to the 2012 percentage. Of those users who provided an amount, the average expenditure per person per trip was \$13.76, compared to \$13.28 in 2012 — evidencing a certain level of consistency.

6.8% of the respondents indicated that their visit to the trail involved an overnight stay. On average they spent \$113.00 on overnight accommodations, up from \$92.67 in 2012.

One of the most important aspects of the user survey from the standpoint of the York County Department of Parks and Recreation is the tracking of user perceptions regarding the maintenance, safety and cleanliness of the Heritage Rail Trail County Park. In 2017, the user rating for maintenance was virtually identical to 2012; perceptions of safety and security and cleanliness decreased slightly. In all three categories, 91% to 97% of all visitors gave ratings of excellent or good to the York County Department of Parks and Recreation. Trail surface was also ranked as excellent or good by slightly over 90% of the respondents.

2017 survey respondents were asked if they were aware of the Heritage Rail Trail's connection to Maryland's Torrey C. Brown Trail. 88.8% responded yes, a slight decrease from 2012.

The final question on the survey dealt with the importance of trails. Similar to previous years, over 97% of respondents supported the development of additional multi-use trails in York County.

In conclusion, the Heritage Rail Trail County Park continues to attract a large number of users who regularly visit the trail as a means of improving their health and fitness. The 2017 survey and its five preceding surveys, demonstrate that the rail trail's economic impact in terms of both user spending and as a business stimulus has more than repaid the cost of development and on-going maintenance. The survey also reveals that those using the Heritage Rail Trail credit its safety, cleanliness, and overall exceptionally well-maintained appearance to the York County Department of Parks and Recreation. Just as the Heritage Rail Trail County Park is valued by its visitors, the series of surveys conducted on the Heritage Rail Trail since its completion in 1999 are valued by numerous agencies across Pennsylvania and beyond for their ability to track and monitor variations in trail visitation and economic impact. It is a credit to the York County Department of Parks for continuing to conduct these rail trail user studies and for providing the entire rail trail community with a record of trail usage that is unique across our state and the nation.



### **Historical Perspective**



For 134 years, from 1838 to 1972, the Northern Central Railroad connected Baltimore, Maryland with York, Pennsylvania and points north, encouraging the growth of small Pennsylvania communities such as New Freedom, Railroad, Glen Rock and Seven Valleys. The railroad was a major link in the exchange of goods and passenger service between York and Baltimore. It was originally chartered as the Baltimore and Susquehanna Railroad, then the Northern Central Railroad, later the Pennsylvania Railroad and finally the Penn Central Railroad.

The historic train stations in New Freedom and Hanover Junction serve today as reminders of several noteworthy Civil War events, including a stop over by President Abraham Lincoln at the Hanover Junction Train Station on his way to deliver his famous Gettysburg Address.

Following the declaration of bankruptcy of the Penn Central Railroad in 1970 and the major destruction of the rail line in 1972 by Hurricane Agnes, the County of York purchased the rail corridor in 1990 through a special agreement with the Pennsylvania Department of Transportation and formed the York County Rail Trail Authority. This panel of nine volunteers, supported by extraordinary volunteer efforts throughout the County of York, has converted this rail corridor into a unique recreational and transportation asset.

The first mile of trail from the Maryland line to McCullough Street in New Freedom was largely the result of efforts by two Eagle Scouts. Chad Harvey and Jeremy Sykes raised over \$10,000 toward the construction costs and also obtained many in-kind donations of materials and labor. Beginning in the fall of 1994, construction of the next 8.2-mile section would take the trail from New Freedom to Hanover Junction. This phase opened on June 22, 1996. Parking lots were established at New Freedom, Railroad and Hanover Junction.

The final two phases of construction completed the link with the City of York. The 8.5-mile section, from Hanover Junction to the railroad village of Hyde, features very few road crossings as it winds through York County farmland and forested areas. Three small railroad villages - Smysers Station (today known as Seven Valleys), Glatfelter Station and Brillhart Station - offer brief interruptions to the rural landscape. Howard Tunnel, the oldest continuously operational railroad tunnel in the nation, offers a classic example of early railroad engineering. Construction of this section began in the fall of 1998.

The final phase of construction proceeded south from the southern terminus of the Codorus Bikeway Path in York to Hyde. This 1.5-mile section was also referred to as the "Urban Link." Gone is the solitude of the rural countryside, as the trail approaches Market Street in the City of York and its historic buildings dating back to the Revolutionary War. Construction of this final section began in May 1999.

The official opening of the Heritage Rail Trail County Park (HRTCP) was held on August 29, 1999 in conjunction with York County's 250<sup>th</sup> Anniversary. At that time, the Heritage Rail Trail became part of the York County park system. Today it is managed by the York County Department of Parks and Recreation as one of 11 county-owned parks.

In 2000, York County Rail Trail Authority was honored as Conservation Organization of the Year by the Pennsylvania Wildlife Federation for its work in developing the Heritage Rail Trail. The Authority also received an Achievement Award from the York County Department of Parks & Recreation in 2008. Since its opening in 1999, the Heritage Rail Trail has also received numerous recognitions, including designations by the National Park Service. The Heritage Rail Trail and the Torrey Brown Trail were named to the Rails-to-**Trails Conservancy's Hall of Fame** in 2015. The Pennsylvania Department of Conservation and Natural Resources named the Heritage **Rail Trail Pennsylvania's Trail of the Year in 201**5.

York County Parks Department continues to make improvements to the historic corridor. Hanover Junction Train Station was fully restored to its original circa 1860s appearance, and a Grand Opening was held in November 2001. Today, the building contains a museum on the first floor featuring exhibits on the Civil War history of the station and railroad as well as local history. Public restrooms are also available. New Freedom Station was restored to its early Pennsylvania Railroad days, and now contains a museum on railroad history, a cafe, and public restrooms. Both museums are open seasonally and are staffed by the Friends of the Heritage Rail Trail Corridor. Formed in 2001, the mission of the Friends of the Heritage Rail Trail Corridor is to provide assistance to the York County Department of Parks and Recreation as an organization dedicated to the historic preservation and interpretation of the Heritage Rail Trail County Park. Restoration was also completed on the Howard Tunnel in 2003.

In all, Heritage Rail Trail County Park features seven railroad structures listed on the National Register of Historic Places. A series of interpretive signs along the trail inform visitors of the rail **trail's historic past, such as Civi**l War events, the rise and fall of mills and other businesses that once thrived along the rails, and natural geological features.

In 2003, York County Rail Trail Authority conducted a feasibility study to assess the opportunities to extend the Heritage Rail Trail County Park through York City along the Codorus Creek to make a connection approximately five miles north at John Rudy County Park in East Manchester Township. In November 2006, construction of this Northern Extension of HRTCP began at John Rudy County Park with a destination of connecting in York City. On Earth Day, April 22, 2015, 4.3 miles of the Northern Extension stretching from John Rudy County Park to RT 30 were officially open to the public. The final phases of this project will be completed in 2018.

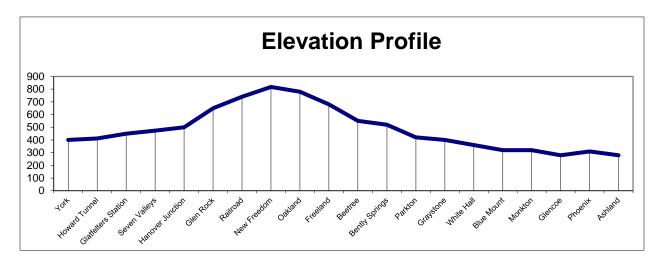
In 2016, the City of York joined with many community partners, including Downtown Inc. and York College of Pennsylvania, to improve the section of the Heritage Rail Trail from Jessup Place to W Market Street. Originally built in the 1980s as the Codorus Bikeway Path, this section was widened, repaved, and received new lighting. Additionally, since the 2012 survey, York County Department of Parks and Recreation continues to make improvements to the Heritage Rail Trail and the completed sections of the Northern Extension.

### **Location Analysis**



Heritage Rail Trail County Park (HRTCP) is located in the south central region of Pennsylvania. Generally running north and south through the south central portion of York County, the trail follows the former Northern Central Railway line as well as the south branch of the Codorus Creek.

Although the grade throughout the length of the rail trail is reasonably level, New Freedom is the highpoint with an elevation of 818 feet above sea level. Traveling north from New Freedom the grade is slightly downhill to York at 400 feet above sea level. The following is a profile of the Heritage Rail Trail from York to New Freedom and the Torrey C. Brown Trail (formerly NCR Trail) from New Freedom to Ashland, Maryland.



Heritage Rail Trail County Park has a 10-foot wide, compacted surface designed for bicycling, hiking, running, horseback riding, as well as winter sports such as cross-country skiing and snowshoeing.

Facilities along the trail include benches, picnic tables, and portable toilets. Full service restrooms are available at the Hanover Junction and New Freedom train stations. Communities along the trail offer more extensive facilities.

Winding through the heart of York County, the trail extends over 21 miles from the state line, where it joins Maryland's Torrey C. Brown Trail (formerly the NCR Trail), which extends another twenty-one miles into Maryland. The southern half of HRTCP, from the Maryland line to Seven Valleys, passes through rural farmland and small towns. From Seven Valleys northward, the trail winds through the picturesque valley of the south branch of the Codorus Creek with long sections of uninterrupted woodland interspersed with farm fields.

The park is open year round from dawn until dusk and is patrolled by York County Department of Parks and Recreation rangers. The park follows a "Carry-In/Carry-Out" policy with regard to trash, and other rules and regulations are posted at each parking lot and on gates at road crossings. In 2002, the York County Parks created a system-wide Park Ambassador program. The mission of a Park Ambassador is "to provide a presence on park grounds in a non-enforcement capacity." Ambassadors provide general information; explain trail rules, regulations, and ethics for trail users; offer advice on public safety concerns; and take an active role in protecting and preserving the park.

#### HERITAGE RAIL TRAIL COUNTY PARK MILEAGE

Landmark	Trail Miles
Maryland Line	0.0
New Freedom Train Station	1.5
Railroad Parking Lot	3.0
Glen Rock Parking Lot	6.25
Hanover Junction Train Station	10.5
Seven Valleys Bridge	11.5
Glatfelters Station Road Crossing	13.5
Howard Tunnel	15.25
Days Mill Road Crossing	17.0
Hyde	18.5
Richland Avenue Overpass	19.75
York City Bikeway Path	20.25

The Northern Extension of the Heritage Rail Trail County Park does not use a former railroad corridor but parallels the main branch of Codorus Creek from John Rudy Park County Park to the City of York. Leaving John Rudy Park County Park, the Northern Extension crosses Mundis Race Road, parallels the roadway, and then turns toward the creek. The trail passes along Crist Memorial Field before crossing the Codorus Creek and passing under Mundis Mill Road to continue on the east bank of the creek. The trail gains some elevation along a wooded hill-side with views of the creek below. Leaving the woods the trail picks up on the U. S. Army Corps of Engineer levees, passing under U. S. Route 30 to a parking lot along Loucks Mill Road. The final phases, which will be constructed in 2018, will bring the trail into the City of York.

# Heritage Rail Trail County Park Map





# York County Demographics & Climate



#### **York County Demographic Profile**

Population	443,744
Per Capita Income	\$28,403
Median Household Income	\$58,269
Total Housing Units	181,457
Persons Per Household	2.57

Source: U. S. Census QuickFacts, population estimates July 1, 2016

#### **Population Growth**

	2010	2020	2030	2040
York County	435,586	460,514	484,497	498,246

Source: The Center for Rural Pennsylvania, March 2014

#### **York County Climate**

York County has a relatively mild and humid climate. This can, in part, be attributed to nearby mountains that protect the area from more severe weather that occurs 50 to 100 miles north and west. To a lesser extent the Atlantic Ocean to the east has a moderating effect upon the **County's climate. With the prevailing winds being from the west, the weather disturbances t**hat are most likely to affect the County are from the interior of the continent. Although the day to day weather is sometimes affected by coastal storms, the Atlantic Ocean is considered to have only a limited influence on the total climate. In summer, the winds are generally from the southwest bringing moisture from the Gulf of Mexico into the area. Consequently, the humidity is relatively high and the climate is characterized as humid continental.

A growing season of about 170 days prevails throughout the County, and in conjunction with sufficient rainfall has promoted a flourishing agricultural industry. The summer months alone produce 10-13 inches of rainfall, the average annual amount being about 40 inches with the heaviest concentration along the Maryland-Pennsylvania border. Drier winter months produce 7-9 inches of precipitation, of which approximately 30 percent falls as snow. The average annual snowfall is about 31 inches.

The average temperature for York County is 52.8 degrees. The relatively short winters have readings of less than 32 degrees occurring about 100 days per year. During the summers, temperatures of 90 degrees or greater occur about 25 days per year, and temperatures of 100 degrees or more are relatively rare.

### **Community Involvement**



York County Department of Parks and Recreation recognizes the multitudes of volunteers (the general public, scouts, community groups, etc.) that provide assistance in helping to maintain the Heritage Rail Trail County Park and keep it clean. Volunteers contributed thousands of hours toward the maintenance of HRTCP. Volunteer tasks include gardening at Hanover Junction/New Freedom train stations, litter clean up and serving as museum greeters.

Another indication of the popularity of the Heritage Rail Trail County Park is the diversity of organizations that have used the rail trail as a focal point of their activities during 2017, they include:

York Road Runners Winter Series Race Owl Walks - nature hike Carry the Fallen Walking Event Sunset Scramble Bike rides Spartan half marathon race Go Green in the City event Moonlite Bike Rides Cowboy Raids on the Train event Glen Rock Arts and Brew Fest 5K race York County Archaeology Program York County Porch Talks Senior Excursions Reenactment of Confederates raiding the train event 87th Regiment Encampment York College 5K race Pumpkin Walk New Freedom VFW 5K race York College 5K and 10k races Crop Walk Event Gung Ho Pint Night ride Hanging of the Greens at the Stations Yorkfest Fine Arts Festival New Freedom Fest

# Qualitative Values (Survey Comments)



The best way to describe the qualitative values of the Heritage Rail Trail County Park is to let the trail users tell us what they think. The following are comments that were taken from the 2017 Trail User survey forms:

"Thankful for a place to ride/walk. This is safe from the highway traffic."

"We moved to Glen Rock because of the trail & we live 3/4 mile from trail."

"Keep up the great work. Happy to be a supporter and anxious to have the next section from rt 30 to the city completed."

"Need to clean up portions of trail more frequently, developing additional trails means more maintenance & clean-up work which is not being done well enough now."

"We are so lucky to have the Rail Trail in York County."

"I love the quiet, no cars, nice scenery with nature."

"One excellent bike ride experience. Will recommend to all my family and friends."

"Rt 30 to Crist Field is amazing."

"Please help keep softball teams, parents and spectators off the trail at Crist Park. This is my favorite trail. Hilly, shaded and a stream."

"Well maintained trail system with added bonus of town (New Freedom) directly on trail that makes for a great destination point."

"Thank you to everyone who maintains these trails. I love walking my dog on the trails and greatly appreciate all the hard work that goes in to developing and maintaining them. THANK YOU!!!!!"

"I am noticing that more people lately don't seem to pick up after their dogs. I wonder if placing some signs on the trail as a reminder would help."

"Post signs indicating bikers should give warnings when passing other bikers or pedestrians."

"Can't wait for the trail to be completed between 30 and York, we are really looking forward to it!"

# 2017 Survey Results



#### Question 1.

What is your ZIP Code?

75.6%	York County
11.7%	Maryland
3.2%	Lancaster County
4.9%	Harrisburg Metro
2.4%	Philadelphia Metro
2.2%	All other areas

#### Question 2.

How often, on average, do you use the Trail? (Check one)

8.7%	Daily
21.4%	Between 3 and 5 times a week
13.6%	1 or 2 times a week
15.8%	Once a week
17.7%	A couple of times a month
6.8%	Once a month
10.4%	Few times a year
5.6%	First time

#### Question 3.

Please identify your age group. (Check one)

1.2%	under 15
4.1%	16 - 25
6.2%	26 <b>-</b> 35
12.4%	36 <b>-</b> 45
18.4%	46 - 55
29.4%	56 - 65
28.2%	66 or older

#### Question 4.

Any children under the age of 15?

12.2%	Yes
87.8%	No

#### Question 5.

What is your gender?

58.9%	Male
41.1%	Female

#### Questions 6.

What is your primary activity on the Trail? (Check one)

27.8% 43.3% 11.3% 0.4% 1.1% 0.7% 2.8% 1.1%	Walking/hiking Biking Jogging/running Horseback riding Cross country skiing Geocaching Nature study Fishing
11.5%	Other

#### Question 7.

Has the trail had an influence on the type or frequency of activity you participate in?

88.0%	Yes
12.0%	No

#### Question 8.

Generally, when do you use the Trail? (Check one)

19.8%	Weekdays
19.8%	Weekends
60.5%	Both

#### Question 9.

How much time do you generally spend of the Trail each visit?

1.2%	Less than 30 minutes
22.1%	30 minutes to 1 hour
47.7%	1 to 2 hours
29.0%	More than 2 hours

#### Question 10.

Would you consider your use of the Trail to be for...

28.8%	Recreation
61.4%	Health and Exercise
6.8%	Fitness Training
1.0%	Commuting
0.4%	Walking to school
1.6%	Other

#### Question 11.

During your trail visit did you?

21.7%	Bird watch
31.0%	Watch wildlife
11.1%	Study wildflowers
0.7%	Geocache
4.6%	Visit museums
18.6%	Read interpretive signs
3.9%	Shop
8.4%	Other

#### Question 12.

How did you find out about the Trail?

Word of mouth
Roadside signage
Driving past
Newspaper
Bike Shop
York County Convention and Visitors Bureau
Facebook
York County Parks Brochure
www.ExplorePAtrails.com
www.TrailLink.com
www.yorkcountytrails.org
https://yorkcountypa.gov/parks-recreation.html
Other

#### Question 13.

Has your use of the Trail influenced your purchase of? (Check all that apply)

22.4%	Bike
24.3%	Bike supplies
4.7%	Auto accessories
17.3%	Running/walking/hiking shoes
18.1%	Clothing
11.3%	Nothing
1.7%	Other

#### Question 14.

Approximately how much did you spend on the items above in the past year? (enter dollar amount)

The average for those who indicated they had made a purchase was \$328.17.

#### Question 15.

In conjunction with your most recent trip to the Trail, did you purchase any of the following? (Check all that apply)

18.5%	Bottled water/soft drinks
8.6%	Candy/snack foods
6.0%	Sandwiches
5.5%	Ice cream
17.4%	Meals at a restaurant along the Trail
0.0%	Bike rental
3.1%	Other
41.0%	None of these

#### Question 16:

Approximately how much did you spend per person on the items above? (enter dollar amount)

The average for those who indicated they had made a purchase was \$13.76.

#### Question 17.

Did your visit to the Trail involve an overnight stay in one of the following types of accommodations? (n=28)

17.9%	Motel/Hotel
14.3%	Bed and Breakfast
25.0%	Friend or Relatives Home
17.8%	Campground
25.0%	Other

#### Question 18.

How many nights did you stay in conjunction with your visit to the trail?

Average 2.2 (n=21)

#### Question 19.

Approximately how much did you spend on overnight accommodations per night?

The average expenditure per night was \$113.00 (13 respondents provided spending data)

#### Question 20.

In your opinion, the maintenance of the Trail is (Check one)

62.8%	Excellent
34.7%	Good
2.5%	Fair
0.0%	Poor

#### Question 21.

In your opinion, the safety and security along the Trail is (Check one)

44.0%	Excellent
47.4%	Good
7.3%	Fair
1.2%	Poor

#### Question 22.

In your opinion, the cleanliness of the Trail is (Check one)

63.3%	Excellent
33.8%	Good
2.9%	Fair
0.0%	Poor

#### Question 23.

#### In your opinion, the trail's surface is (Check one)

40.6%	Excellent
51.1%	Good
7.8%	Fair
0.5%	Poor

#### Question 24.

Are you aware that the Heritage Rail Trail County Park connects to the 21 mile Torrey C. Brown Trail (NCR Trail) at the Maryland state line?

88.8%	Yes
11.2%	No

#### Question 25.

What portion of the Trail do you use most often? (Check all that apply)

#### Heritage Rail Trail

12.6%	New Freedom to Railroad
11.4%	Railroad to Glen Rock
11.5%	Glen Rock to Hanover Junction
14.6%	Hanover Junction to Seven Valleys
13.9%	Seven Valleys to Glatfelters Station
14.9%	Glatfelters Station to Brillhart Station
11.4%	Brillhart Station to York College (Grantley Rd.)
6.0%	York College to York City

#### Northern Extension

50.5%	Route 30 to Crist Memorial Field
49.5%	Crist Memorial Field to Rudy Park

#### Question 26.

Which parking lot do you generally use when you visit the Trail? (Check all that apply)

#### Heritage Rail Trail

13.4%	New Freedom
9.7%	Railroad
8.6%	Glen Rock
12.3%	Hanover Junction
8.72	Seven Valleys
9.3%	Glatfelters Station
19.4%	Brillhart Station
5.8%	York City, Pershing Ave.
12.7%	Other
Northern Extern	nsion
38.2%	Route 30
25.0%	Crist Memorial Field
36.8%	John Rudy Park

#### Question 27.

Did your trail experience begin and end at the same location?

96.5%	Yes
3.5%	No

#### Question 28.

Do you support the development of additional multi-use trails in York County?

97.8% Yes 2.2% No



# Methodology and Analysis



The survey form was developed by the York County Department of Parks and Recreation with the assistance of Trail Facts, Cycle Forward and York County Rail Trail Authority. The sample was self-selecting; that is, trail users could pick-up survey forms that were available at each of the trail's primary parking areas and return them to collection boxes at the same locations or mail/fax them to the York County Parks Office. Survey forms were also made available at the museums at Hanover Junction and New Freedom train stations. At these locations, park volunteers encouraged visitors to complete a survey form.

The survey could also be taken online hosted by Survey Monkey. A QR code and a URL to access the survey was available on the paper survey forms and on signage at trailheads.

Survey forms were available to trail users from April through October 2017. For the purpose of this analysis, 414 survey forms were completed (244 paper surveys and 170 online surveys). Because several questions called for multiple responses and some survey respondents did not answer all of the questions, the percentages presented in this analysis are based upon the total number of responses to each individual question, not the 414 usable surveys.

The following analysis will utilize the 1999, 2001, 2004, 2007 and 2012 survey data and the 2017 survey data that was presented previously in this report. The analysis will compare the results of the surveys and offer commentary on changes that are significant or interesting.

(Disclaimer: As a self-selecting survey, the findings are not absolute and no one can predict with any certainty how any of us will act in the future. That said, the findings track very closely with similar surveys and other published reports and anecdotal evidence).



## **Comparative Analysis**



#### 1999, 2001, 2004, 2007, 2012 and 2017 SURVEYS

Question 1.

What is your ZIP Code?

	1999	2001	2004	2007	2012	2017
York County	62.7%	63.9%	61.7%	60.8%	68.1%	75.6%
MD, VA & DC	18.4%	11.6%	20.3%	25.7%	19.7%	11.7%
Lancaster County	6.5%	2.9%	6.2%	3.6%	5.6%	3.2%
Harrisburg Metro	4.6%	4.6%	4.3%	2.2%	1.2%	4.9%
Philadelphia Metro	2.5%	2.9%	2.3%	2.7%	1.5%	2.4%
All other areas	2.7%	4.2%	5.4%	4.1%	3.9%	2.2%

While the majority of trail users live within York County, out of county trail users make a contribution to the local economy by purchasing goods and services from local businesses along the trail. It is important to understand visitation patterns and from where people are visiting. The most significant change regarding where the participants in the survey live is the decrease in the number of survey participants from the Maryland/Virginia/DC area.

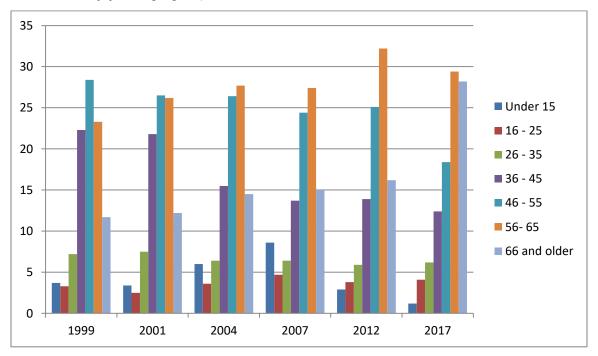
Question 2. How often, on average, do you use the Trail? (Check one)

	1999	2001	2004	2007	2012	2017
Daily	1.8%	3.1%	2.0%	5.9%	7.1%	8.7%
3-5	11.8%	17.7%	14.3%	16.4%	19.5%	21.4%
times/wk.						
1-2	16.7%	19.4%	20.6%	24.6%	11.8%	13.6%
times/wk.						
Once a	13.3%	5.3%	8.2%	9.6%	13.6%	15.8%
week						
A couple	21.2%	14.6%	17.7%	13.2%	13.6%	17.7%
times a						
month						
Once a	21.4%	5.3%	5.4%	5.0%	5.3%	6.8%
month						
Few times a	5.1%	19.6%	20.2%	14.1%	18.6%	10.4%
First time	8.1%	14.3%	11.6%	11.4%	10.4%	5.6%

The increase in the number of survey participants indicating that they use the trail more than two days a week has steadily increased. It is interesting to note that the number of first time users has declined significantly after sections of the trail have been open for 20 years.

Question 3.

Please identify your age group. (Check one)



	1999	2001	2004	2007	2012	2017
Under 15	3.7%	3.4%	6.0%	8.6%	2.9%	1.2%
16 <b>–</b> 25	3.3%	2.5%	3.6%	4.7%	3.8%	4.1%
26 <b>-</b> 35	7.2%	7.5%	6.4%	6.4%	5.9%	6.2%
36 <b>–</b> 45	22.3%	21.8%	15.5%	13.7%	13.9%	12.4%
46 <b>-</b> 55	28.4%	26.5%	26.4%	24.4%	25.1%	18.4%
56 <b>–</b> 65	23.3%	26.2%	27.7%	27.4%	32.2%	29.4%
66 or older	11.7%	12.2%	14.5%	15%	16.2%	28.2%

The age distribution of trail users has changed somewhat since the initial survey. Trail users under 36 have decreased while those 45 and over have increased. It is of interest to note that this age profile is typical of many trails across the country.

From observations along the trail, there is a presumption that trail users under age 36 are being under represented in the surveys. They may be less inclined to take the time to complete the survey form; they may have children in tow; or they are moving quickly from one activity to another and don't bother stopping by a kiosk. Additional research is required to verify this presumption. The availability of an online version of the survey may have helped to slightly increase representation from this age demographic.

Question 4.

Were any children 15 years of age or younger with you on your trail experience today?

	2007	2012	2017
Yes	25.4%	21.0%	12.2%
No	74.6%	79.0%	87.8%

This question was added to the survey in 2007. The older demographic (57% over age 56) is probably a contributing factor to this low percentage.

Question 5:

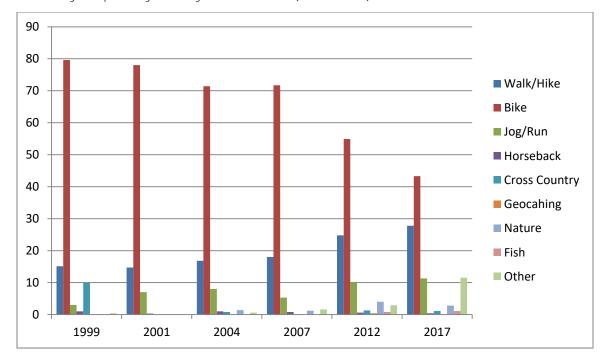
What is your gender?

	1999	2001	2004	2007	2012	2017
Male	53.1%	57.0%	58.0%	60.9%	56.0%	58.9%
Female	46.9%	43.0%	42.1%	39.1%	44.0%	41.1%

The percentage of men using the trail increased slightly over what was reported by respondents in previous surveys. The percentage of female responding to the survey decreased after higher percentages in every year except 2007.

Questions 6.

What is your primary activity on the Trail? (Check one)



	1999	2001	2004	2007	2012	2017
Walking/Hiking	15.1%	14.7%	16.8%	18.0%	24.8%	27.8%
Biking	79.6%	78.0%	71.4%	71.7%	54.9%	43.3%
Jogging/Running	3.0%	7.0%	8.0%	5.3%	10.2%	11.3%
Horseback	1.0%	0.3%	1.0%	0.8%	0.6%	0.4%
Riding						
Cross Country	10.0%	0.0%	0.8%	0.0%	1.3%	1.1%
Skiing						
Geocaching	NA	NA	NA	NA	0.4%	0.7%
Nature Study	NA	NA	1.4%	1.2%	4.0%	2.8%
Fishing	NA	NA	NA	NA	.8%	1.1%
Other	0.4%	0.0%	0.6%	1.6%	2.9%	11.5%

While the Heritage Rail Trail is predominately used by cyclists, the percentage stating this as their primary activity has declined significantly since 2007. Walkers/hikers have stepped up usage of the trail. There are regular walking groups that use the trail several times a week for exercise and health. The number of joggers/runners has increased in the past two surveys, this may indicate younger respondents. Also groups of runners from York College have been observed on the trail. "Nature study" was included as a separate primary activity in 2004 and increased significantly in the 2012 survey but dropped back in 2017. Cross country skiing and other winter related activities, such as snowshoeing, are dependent upon the amount of winter snowfall, which has been inconsistent and minimal over most of the past 13 years.

Question 7:

Has the trail had an influence on the type or frequency of activity you participate in?

	2012	2017
Yes	84.3%	88.0%
No	15.7%	12.0%

The presence of the Heritage Rail Trail County Park has had a positive influence on the users. It is contributing to a healthier community by providing a safe environment in which people can walk, bike, run or just enjoy the outdoors.

### Question 8.

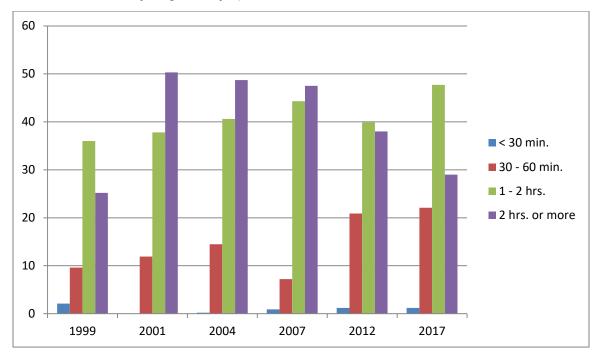
Generally, when do you use the Trail? (Check one)

	1999	2001	2004	2007	2012	2017
Weekdays	36.7%	49.1%	42.7%	43.9%	17.2%	19.8%
Weekends	63.3%	50.9%	48.6%	56.1%	34.2%	19.8%
Both	NA	NA	8.6%	NA	48.6%	60.5%

In the 2004 survey, 8.6% of the respondents indicated that they used the trail on both weekdays and weekends. This was not captured in previous studies nor in the 2007 survey. The dramatic shift from weekend or weekday use to both from the 2004 survey to the 2017 survey is another indication of the increased usage of the Heritage Rail Trail County Park.

Question 9.

How much time do you generally spend on the Trail on each visit? (Check one)

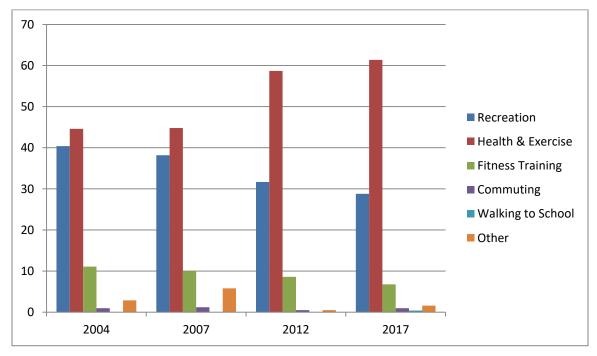


	1999	2001	2004	2007	2012	2017
Less than	2.1%	0.0%	0.2%	0.9%	1.2%	1.2%
30 minutes						
30 minutes	9.6%	11.9%	14.5%	7.2%	20.9%	22.1%
to 1 hour						
1 <b>–</b> 2 hours	36.0%	37.8%	40.6%	44.3%	39.9%	47.7%
2 hours or	25.2%	50.3%	48.7%	47.5%	38.0%	29.0%
longer						

As a generalization, cyclists spend more than two hours on each outing while walkers and joggers spend between 1 and 2 hours. The percentage of survey respondents using the Trail for 30 minutes to an hour has increased significantly which may correspond with the increased percentage of survey respondents who indicate that they walk or run on the trail.

Question 10.

Would you consider your use of the Trail to be for...



	2004	2007	2012	2017
Recreation	40.4%	38.2%	31.7%	28.8%
Health & Exercise	44.6%	44.8%	58.7%	61.4%
Fitness Training	11.1%	10.0%	8.6%	6.8%
Commuting	1.0%	1.2%	0.5%	1.0%
Walking to school	NA	NA	0.0%	0.4%
Other	2.9%	5.8%	0.5%	1.6%

Outings to the Heritage Rail Trail to get some exercise and improve an individual's health have increased significantly since this questions was added to the survey in 2004. In other surveys conducted in Pennsylvania by the Rails-to-Trails Conservancy, health and exercise also dominate the response to this question.

Question 11.

#### During your visit did you...

	2012	2017
Bird Watch	15.5%	21.7%
Watch wildlife	23.9%	31.0%
Study Wildflowers	10.8%	11.1%
Geocache	0.0%	0.7%
Visit museums	19.2%	4.6%
Read interpretive signs	18.4%	18.6%
Shop	6.6%	3.9%
Other	5.7%	8.4%

Question 12.

How did you find out about the Trail?

	1999	2001	2004	2007	2012	2017
Word of mouth	39.2%	41.2%	42.1%	41.9%	35.7%	31.0%
Roadside signage	3.6%	3.1%	4.7%	3.5%	7.7%	5.9%
Drive past	7.7%	7.0%	12.2%	5.0%	13.0%	13.8%
Newspaper	18.5%	16.4%	12.3%	8.8%	6.6%	5.7%
Bike shop	5.4%	2.8%	5.2%	6.1%	4.9%	5.0%
York County Convention and Visitors Bureau	NA	NA	1.9%	0.8%	1.9%	1.6%
Tourists information center	2.3%	2.2%	1.3%	1.9%	NA	NA
Facebook	NA	NA	NA	NA	1.1%	2.2%
York County Parks brochure	NA	NA	NA	NA	9.4%	11.0%
York County Parks Department	6.1%	9.5%	7.3%	5.4%	NA	NA
www.ExplorePAtrails.com	NA	NA	NA	NA	1.5%	1.5%
www.TrailLink.com	NA	NA	NA	NA	1.9%	4.4%
www.yorkcountytrails.org	NA	NA	NA	NA	NA	2.9%
www.Yorkcountypa.gov/parks-	NA	NA	NA	NA	6.8%	5.1%
<u>recreation</u>						
Internet web site	2.3%	4.5%	3.9%	5.4%	NA	NA
Other	NA	NA	NA	15.3%	9.4%	9.8%

Word of mouth continues to be the single greatest source of information regarding the Heritage Rail Trail County Park. Roadside signage and driving past decreased between 2012 and 2017. The use of the Internet to find out about trails has become much more important over the past five years. If we look at the historic percentage, "Internet web site" increased from 2.3% in 1999 to 5.4% in 2007. Looking at the four new web sources beginning in 2012, the combined percentage is 13.9% - more than double. The Parks Department printed brochure still plays a key role for trail users. York County Parks Department should work to increase information about the trail that is available in Visitor Bureau promotions. Adding a link between the organizations web sites would be one way of improving the flow of information.

#### Question 24.

Are you aware that the Heritage Rail Trail County Park connects to the 21 mile Torrey C. Brown Trail (NCR Trail) at the Maryland state lien?

	2012	2017
Yes	91.5%	88.8%
No	8.5%	11.2%

The connection to the Torrey C. Brown Trail in Maryland helps to bring tourism dollars directly into York County from our neighbors to the south.

Question 25.

Which portion of the trail do you use most often (Check all that apply)

Heritage Rail Trail	2012	2017
New Freedom to Railroad	14.1%	12.6%
Railroad to Glen Rock	13.5%	11.4%
Glen Rock to Hanover Junction	12.2%	11.5%
Hanover Junction to Seven	14.9%	14.6%
Valleys		
Seven Valleys to Glatfelters	13.3%	13.9%
Station		
Glatfelters Station to Brilhart	13.9%	14.9%
Station		
Brillhart Station to York College	9.8%	11.6%
York College to York City	4.9%	6.0%
Northern Extension		
Rudy Park to Crist Field	3.4%	49.5%
Crist Field to Route 30	NA	50.5%

Usage of the trail is fairly consistent between New Freedom and York College. The section of the trail between York College and the City of York was rehabilitated during 2016. The trail was widened and improved lighting was installed. This has contributed to increased usage of the trail by York College students



Question 26.

Which parking lot do you generally use when you visit the Trail? (check all that apply)

	1999	2001	2004	2007	2012	2017
Heritage Rail Trail						
New	13.8%	9.5%	9.8%	13.4%	14.7%	13.4%
Freedom						
Railroad	10.2%	9.7%	9.9%	8.2%	10.0%	9.7%
Glen Rock	11.0%	9.9%	8.8%	10.9%	11.2%	8.6%
Hanover Junction	35.0%	15.3%	15.8%	17.6%	12.1%	12.3%
Seven Valleys	NA	7.2%	10.5%	10.9%	8.7%	8.7%
Glatfelters Station	NA	5.8%	9.8%	8.9%	10.4%	9.3%
Hyde	0.8%	NA	NA	NA	NA	NA
Brillhart Station	2.9%	15.5%	20.8%	15.3%	14.1%	19.4%
Indian Rock Dam Road	0.8%	NA	NA	NA	NA	NA
Drover's Bank on Richland Ave.	12.6%	7.8%	NA	NA	NA	NA
York City (Pershing Ave.)	10.2%	7.9%	6.1%	3.5%	5.0%	5.8%
Other	NA	NA	3.6%	11.4%	3.6%	12.7%
Northern Extension						
Rudy Park	NA	NA	NA	NA	3.9%	36.8%
Crist Field	NA	NA	NA	NA	1.1%	25.0%
Route 30	NA	NA	NA	NA	NA	38.2%

Most of the shift in terms of the use of trailhead parking facilities has been an increase in the use of the trailheads at the northern end of the trail; for example at Brillhart Station and "Other" trail access points such as, York College. As noted in the table, some of the original trail access points have been closed, such as the Drover's at Richland Avenue, which is now a WellSpan Health facility that prohibits trail user parking. The trailhead calculations in 2012 treated the Northern Extension trailheads as part of the entire trail. Because of the current disconnect between the Route 30 parking lot and the City of York, this was an error in methodology. In this analysis the Northern Extension is treated as a separate trail.

# Heritage Rail Trail County Park User Estimates



During September of 2001, the York County Department of Parks and Recreation undertook a significant project to get a first estimate of the number of users of the Heritage Rail Trail County Park. The methodology involved nearly 100 volunteers who visited the trail parking facilities and counted cars and people.

In 2001, it was calculated that the average user visited the trail 6.6 times a year. In 2004, this value had increased to 7.97 trips per year. In 2007 the average number of trips increased to 10.55 per user/per year. In 2012 it dropped off to 6.1 visits per year but has rebounded to 11.2 annual trips in 2017.

Based on the 2001 user estimate methodology it was calculated that the Heritage Rail Trail County Park attracted 247,000 user visits.

If the 247,000 user visits is divided by 6.6 (the number of annual visits reported by the average user) we determined that there would have been 37,424 individual users. If the assumption is made that that number remains fairly stable and multiply it by the new number of average user visits, 10.55, we can estimate the number of annual user visits in 2007 at 394,823. This was obviously a flawed assumption based on the actual counts now being conducted.

Beginning in 2010, passive infrared counters have been placed at various locations along the Heritage Rail Trail County Park to begin to get a better idea of the number of trail users. In 2010 three counters were placed along the trail between January 1 and April 30; one just south of the Brillhart Station Trailhead, one just north of the Hanover Junction Trailhead and one just north of the Railroad Trailhead. During 2011, counters were placed at the same locations for a period extending from July through November.

During 2012, the most ambitious trail count project was undertaken. Over the course of the period from May through October, passive infrared counters were placed at the following locations: Railroad, Seitzland, Hanover Junction, Glatfelter Station, Howard Tunnel, Brillhart Station and Grantley Avenue.

For the 2017 survey, passive infrared counters were again used to collect actual counts of trail users. Locations were: south of the New Freedom Station, just north of the Railroad trailhead, just north of the Hanover Junction Station, just south of Brillhart Station trailhead, near the trial intersection with Jessop Place, and in John Rudy County Park along the Northern Extension.

Using Rails-to-**Trails Conservancy's Trail User Count Extrapolation Model**, which utilizes counter data from trails across the United States representing 58 counter locations and more than 5 million total counts, a new trail user estimate for the Heritage Rail Trail County Park is presented in the table below.

Heritage Rail T	rail User Visit	S			
Estimate 2017					
	Actual Count for one 30 day period	Annual Estimate to 12 months	Adjusted for Passing Multiple Counters	Adjusted for Missing Counts	Adjusted for Out and back Trips
South of NF Station	11,512	97,614	82,972	93,758	48,754
Railroad	7,091	55,659	47,311	53,460	27,800
Hanover Junction	4,570	35,280	29,988	33,886	17,620
Brillhart Station	7,047	54,401	46,241	52,253	27,171
Jessop Place	2,184	20,092	17,078	19,298	10,035
Northern Extension*	5,257	41,264	35,074	39,634	20,609
Uncounted Users					111,867
Estimated Total					263,856*

#### \*Note:

It is assumed that users of the Northern Extension would have used the Heritage Rail Trail had the extension not been in existence.

One aspect of the use of infrared counter on Heritage Rail Trail County Park needs to be considered in the estimate of total visitors: many visitors may come to the Heritage Rail Trail and not pass one of the counters. For example, visitors who start at Glatfelter Station will not pass a counter unless they continue on to Hanover Junction or Brillhart Station. From the data we know that 9.3% of the trail user survey respondents indicated that they use the Glatetfelter Station trailhead. A counter was also not deployed that would capture users heading north from Brillhart Station until they get to Jessop Place. Therefore, an assumption was made regarding uncounted users based on the percentage of users that indicated they used segments of the Heritage Rail Trail County Park but missed passing a counter.

Another visitor group that is excluded from the total annual visitors is participants in special events along the trail. For example, the York County Rail Trail Authority holds an annual Pumpkin Walk along a quarter mile of trail just north of Seven Valleys. The 2017 event is estimated to have attracted over 5,000 visitors to the trail for this one-night event.

The infrared counts at Hanover Junction in 2017 are half of what they were in 2012. Bridge construction just north of Glen Rock and just south of Seven Valleys on PA Route 616 limited access to this trailhead during the majority of 2017, and may offer an explanation for this dramatic decrease.

## **Economic Impact Analysis**



The economic impact of the Heritage Rail Trail County Park is comprised of a number of elements.

From the survey, the percentage of respondents that have purchased "hard goods" (bikes, bike equipment, running/walking shoes, etc.) was determined. Many of these respondents also revealed how much they spent on these types of purchases over the past 12 months.

Also from the survey, it was **determined what trail users spent on "soft goods" (water, soda,** snacks, ice cream, lunches, etc.) while using the trail. Again, the percentage of respondents who made these types of purchases is also an important aspect for determining the economic impact.

The trail has also fostered new business enterprises that have added employment in York County. From the Whistle Stop Bike Shop in New Freedom to B & B's and numerous restaurants along its length, the trail has ignited an entrepreneurial spirit.

Estimates of the overall economic impact of the Heritage Rail Trail County Park are presented in the form of a table representing a range of annual usage estimates.

#### **Hard Goods**

Question 13. Has your use of the Trail influenced your purchase of? (Check all that apply)

	1999	2001	2004	2007	2012	2017
Bike	29.6%	27.3%	26.0%	27.4%	23.6%	22.4%
Bike Supplies	31.2%	32.3%	26.8%	26.8%	29.1%	24.3%
Auto accessories	NA	NA	15.3%	13.5%	2.6%	4.7%
Running/walking/hiking	6.0%	7.5%	1.1%	9.5%	13.9%	17.3%
shoes						
Clothing	13.4%	12.4%	15.5%	13.7%	17.3%	18.1%
Nothing	17.2%	20.5%	14.2	10.4%	11.0%	11.3%
Other	NA	NA	NA	NA	2.4%	1.7%

In 2017, 88.7% of the sample responded that their use of the Trail had influenced a purchase of the types of items listed above. This is nearly identical to the 2012 response rate. There has been some shifting of the types of purchase. Apparently the survey respondents have the auto accessories that they need for the most part, some of the bike supplies are wearing out, and new shoes are needed from all that walking and running.

Question 14. Approximately how much did you spend on the items above in the past year? (Enter dollar amount)

	1999	2001	2004	2007	2012	2017
Average had goods purchased in past 12 months	\$337.14	\$367.12	\$347.11	\$367.77	\$356.59	\$328.17

This number has remained remarkably consistent over the six studies. It is also very similar to the spending reported in other studies – NCR Trail 2004 - \$333.12, Pine Creek Rail Trail 2006 – \$354.97, Lebanon Valley/Conestoga Trails 2011 – \$327.46

#### **Soft Goods**

Question 15. In conjunction with your most recent trip to the Trail, did you purchase any of the following? (Check all that apply)

	1999	2001	2004	2007	2012	2017
Bottled water/soft drinks	27.2%	29.5%	26.5%	25.8%	20.3%	18.5%
Candy/snack foods	16.2%	16.7%	12.5%	9.7%	11.0%	8.6%
Sandwiches	8.4%	8.9%	8.5%	9.5%	7.0%	6.0%
Ice cream	8.9%	9.9%	8.5%	11.5%	13.9%	5.5%
Meals at a restaurant along the trail	19.1%	13.8%	17.2%	17.5%	14.5%	17.4%
Bike rental	NA	NA	NA	NA	0.2%	0.0%
Film	2.7%	2.7%	1.2%	0.9%	NA	NA
None of these	20.2%	18.6%	25.7%	20.9%	31.1%	41.0%
Other	NA	NA	NA	NA	2.0%	3.1%

59.0% of the sample responded that their use of the Trail had influenced a purchase of one of these items on their most recent visit to the trail. Even though most of the users live in York County and could bring water or a sandwich, they find it more convenient to purchase these items during the course of their trail experience.

Question 16: Approximately how much did you spend per person on the items above? (Enter dollar amount)

	1999	2001	2004	2007	2012	2017
Average soft good purchase on most recent trail visit	\$6.47	\$8.33	\$13.97	\$12.86	\$13.28	\$13.76

Note that this is an average amount spent per person, per trip.

Average spending has increased slightly from 2012 to 2017. New establishments have opened in New Freedom that are drawing trail users: Bonkey's Ice Cream, Seven Sports Bar and Grill, and the Hodle Tavern. The closing of Serenity Station Café in Seven Valleys reduced the number of establishments where trail users could purchase a restaurant style meal.

The following chart takes the 2017 data provided above and extrapolates the purchases over a range of annual usage. While "hard good" purchases may not be made on an annual basis, they represent a significant expenditure figure. The purchase of "soft goods" does represent an annual expenditure, because these purchases are made on a trip basis by users.

Heritage Rail Trail County Park 2017 Economic Impact Analysis

2027 200101110 2111 2007 (11017010							
					Annual		
					Users		
					200,000	250,000	300,000
Category	%	Avg. \$	Average	# of			
	Usage		Life	Trips			
Hard	88.7%	\$328.17	6 years	11.2	\$1,617,149	\$2,021,436	\$2,425,723
Goods*							
Soft	69.0%	\$13.76			\$1,898,880	\$2,373,600	\$2,848,302
Goods							

Hard Goods = (% Usage X (Avg. \$/Avg. Life) X (# Users/Avg. Number of Trips)\* (.887 X (\$328.17/6)) X (200,000/6) = \$1,617,149

Soft Goods = (% Usage X Annual Users X Users Avg. \$) (.69 X13.76x200,000) = \$1,898,880

<sup>\*</sup>Major hard good purchases such as a bike may be replaced every 5 to 10 years. Running shoes may be replaced every couple of months. For the purpose of this analysis, it is assumed an average life of 6 years. To get a "hard goods" expenditure figure that is on an annual user basis, the hard goods expenditure needs to be broken down to a per-trip figure.

For comparison purposes, below are the Economic Impact tables from the 2012, 2007, 2004 and 2001 User Studies.

Heritage Rail Trail County Park 2012 Economic Impact Analysis

					o ziiipace / iii		
					Annual		
					Users		
					250,000	300,000	350,000
Category	%	Avg. \$	Average	# of			
	Usage		Life	Trips			
Hard	89.0%	\$356.59	6 years	6.1	\$2,166,212	\$2,601,353	\$3,034,912
Goods*							
Soft Goods	69.9%	\$13.28			\$2,320,680	\$2,784,816	\$3,248,952

Hard Goods = (% Usage X (Avg. \$/Avg. Life) X (# Users/Avg. Number of Trips)\* (.890 X (\$356.59/6)) X (250,000/6.1) = \$2,166,212

Soft Goods = (% Usage X Annual Users X Users Avg. \$) (.699 X 250,000 X 13.28) = \$2,320,680

Heritage Rail Trail County Park 2007 Economic Impact Analysis

					Annual		
					Users		
					300,000	350,000	400,000
					300,000	330,000	400,000
Category	%	Avg. \$	Average	# of			
	Usage		Life	Trips			
Hard	89.6%	\$367.77	6 years	10.55	\$1,564,135	\$1,823,933	\$2,085,514
Goods*							
Soft	79.1%	\$12.86			\$3,051,678	\$3,560,291	\$4,068,903
Goods							

Hard Goods = (% Usage X (Avg. \$/Avg. Life)X (# Users/Avg. Number of Trips)\* (.896 X (\$367.77/6)) X (300,000/10.55) = \$1,867,731

Soft Goods = (% Usage X Annual Users X Users Avg. \$) (.791 X 300,000 X 12.86) = \$3,051,678 Heritage Rail Trail County Park 2004 Economic Impact Analysis

			<u> </u>		Tilipact Alla	<u>., </u>	
					Annual		
					Users		
					200,000	250,000	300,000
Category	%	Avg. \$	Average	# of			
	Usage		Life	Trips			
Hard Goods*	85.77%	\$347.11	6 years	7.97	\$1,245,154	\$1,556,442	\$1,867,731
Soft Goods	74.31%	\$13.97			\$2,076,221	\$2,595,276	\$3,114,332

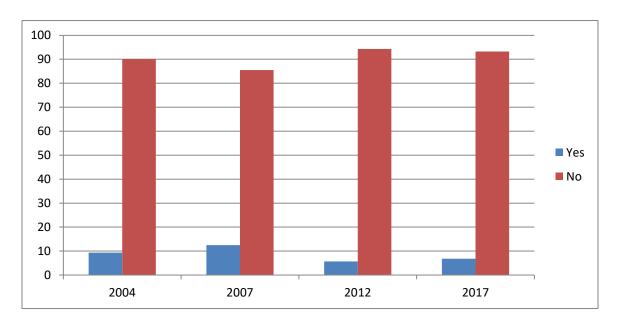
## Heritage Rail Trail County Park 2001 Economic Impact Analysis

					Annual			
					Users			
					100,000	200,000	250,000	300,000
Category	%	Avg. \$	Average	# of				
	Usage		Life	Trips				
Hard	72.2%	\$367.12	6 years	6.6	\$669,345	\$1,338,690	\$1,673,362	\$2,008,035
Goods								
Soft	65.6%	\$8.33			\$546,448	\$1,092,896	\$1,366,120	\$1,639,344
Goods								

Another aspect of the trails economic impact that was researched during the 2004, 2007 and 2012 surveys involved those users who stayed overnight in local accommodations in conjunction with their trail visit. The following charts provide an analysis of the data collected.

Question 17.

Did your visit to the Trail involve an overnight stay in one of the following types of accommodations?

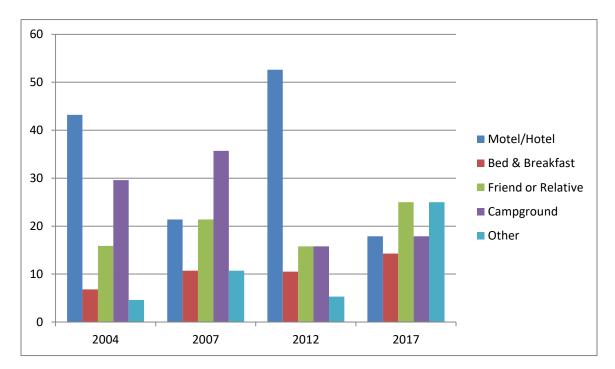


	2004	2007	2012	2017
Yes	9.9%	12.5%	5.7%	6.8%
No	90.1%	85.5%	94.3%	93.2%



#### Question 17a.

Did your visit to the Trail involve an overnight stay in one of the following types of accommodations?



	2004	2007	2012	2017
Motel/Hotel	43.2%	21.4%	52.6%	17.9%
Bed and Breakfast	6.8%	10.7%	10.5%	14.3%
Friend or Relatives	15.9%	21.4%	15.8%	25.0%
Home				
Campground	29.6%	35.7%	15.8%	17.9%
Other	4.6%	10.7%	5.3%	25.0%

There was a significant shift in the type of accommodations that the survey respondents preferred between 2012 and 2017. Motel/Hotel fell considerably as a preference, B & B's increased slightly but the largest increase was in "Other". From the responses, Airbnb accounts for most of that increase.

### Question 20. Approximately how much did you spend on overnight accommodations per night?

**The average expenditure per night was \$113.00** (13 respondents provide spending data). This average is \$20 more than the 2012 average, showing the shift from motels/hotels to B&B's and Airbnb.

# Trail Maintenance, Security and Cleanliness



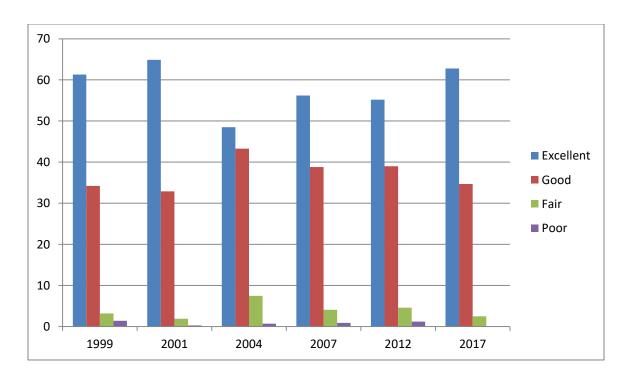
When the initial survey was conducted in 1999, it was in conjunction with the grand opening of the Heritage Rail Trail County Park. The data collected on this brand new county park established a benchmark for user perceptions regarding maintenance, safety and cleanliness.

By collecting this information in each subsequent study, the York County Department of Parks and Recreation receives direct user feedback on how users feel about these important issues.

Well maintained, safe, clean trails attract repeat local users and can serve as an attractive destination for "recreational tourists."

Question 20.

In your opinion, the maintenance of the Trail is (Check one)

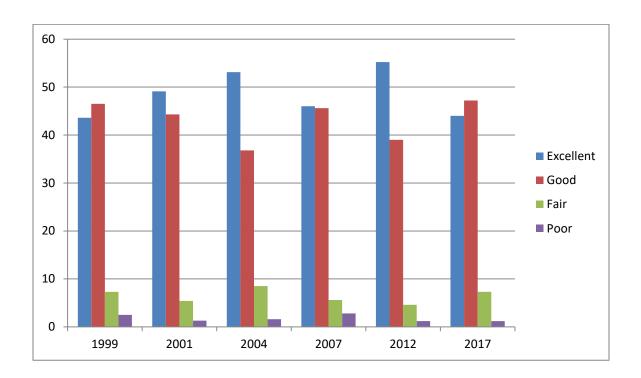


	1999	2001	2004	2004	2012	2017
Excellent	61.3%	64.9%	48.5%	56.2%	53.2%	62.8%
Good	34.2%	32.9%	43.3%	38.8%	41.4%	34.7%
Fair	3.2%	1.9%	7.5%	4.1%	5.1%	2.5%
Poor	1.4%	0.3%	0.7%	0.9%	0.3%	0.0%

The maintenance of the Heritage Rail Trail has been rated excellent or good by more than 97% of the survey participants in each of the surveys, from the year the trail opened through its eighteenth year. This is a credit to the staff of the York County Parks Department.

Question 21.

In your opinion, the safety and security along the Trail is (Check one)

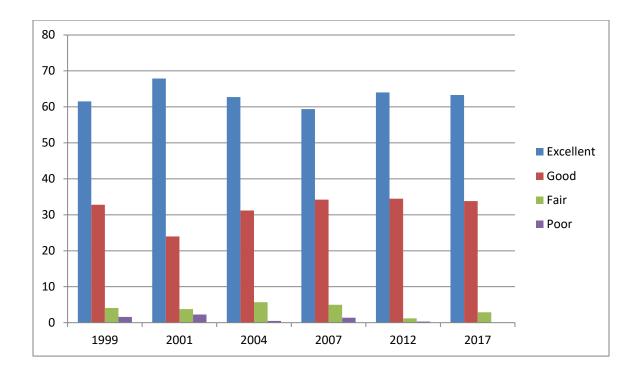


	1999	2001	2004	2007	2012	2017
Excellent	43.6%	49.1%	53.1%	46.0%	55.2%	44.0%
Good	46.5%	44.3%	36.8%	45.6%	39.0%	47.4%
Fair	7.3%	5.4%	8.5%	5.6%	4.6%	7.3%
Poor	2.5%	1.3%	1.6%	2.8%	1.2%	1.2%

The Heritage Rail trail has had very few security issues. The physical appearance of park rangers and trail ambassadors helps to add to user's sense of security. Also, a trail that has a high usage rate with lots of people on the trail any day of the week and from sun up until sun down has a constant source of surveillance.

Question 22.

In your opinion, the cleanliness of the Trail is (Check one)



	1999	2001	2004	2007	2012	2017
Excellent	61.5%	67.9%	62.7%	59.4%	64.0%	63.3%
Good	32.8%	24.0%	31.2%	34.2%	34.5%	33.8%
Fair	4.1%	3.8%	5.7%	5.0%	1.2%	2.9%
Poor	1.6%	2.3%	0.5%	1.4%	0.3%	0.0%

The cleanliness of the trail has consistently been rated very highly. To a large extent this is **probably due to the initial decision by the Parks Department to have a "carry in, carry out"** policy. Additionally, because the trail is such an admired community asset, many users pick-up the litter of those who are less respectful.

Question 23.

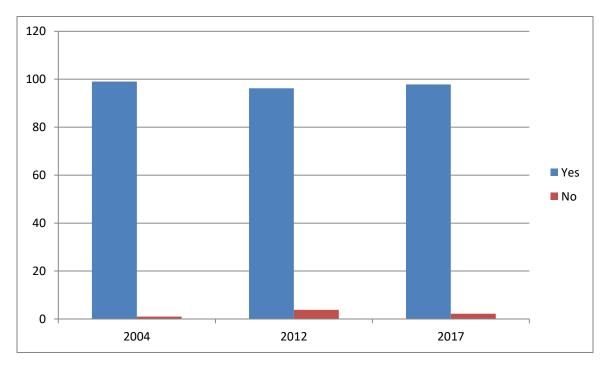
In your opinion, the trail surface is? (Check one)

	2012	2017
Excellent	37.6%	40.6%
Good	53.3%	51.1%
Fair	8.0%	7.8%
Poor	1.2%	0.5%

Overwhelmingly they feel that the trail surface is Excellent or Good. York County Parks does regular maintenance to keep the trail surface in fine condition for a wide variety of activities.

Question 27.

Do you support the development of additional multi-use trails in York County?



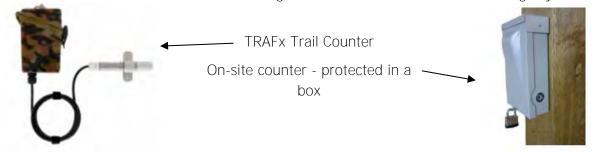
	2004	2012	2017
Yes	99.0%	96.2%	97.8%
No	1.0%	3.8%	2.2%

Support for additional trails has been consistently high over the course of the surveys covering the past 13 years.

# Appendix A – Trail Counter Data

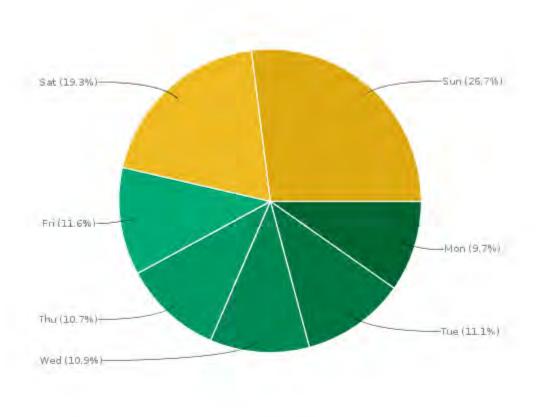


TRAFx Infrared Trail Counters were used on the Rail Trail. TRAFx Infrared Trail Counters are designed to count general traffic on trails and paths — hikers, joggers, horseback riders, cyclists, etc. It is a very compact, easy-to-hide counter. Using a small, high-quality infrared scope mounted in a standard electrical box pointed towards the trail, the TRAFx Infrared Trail Counter detects and counts the infrared signature associated with warm, moving objects.

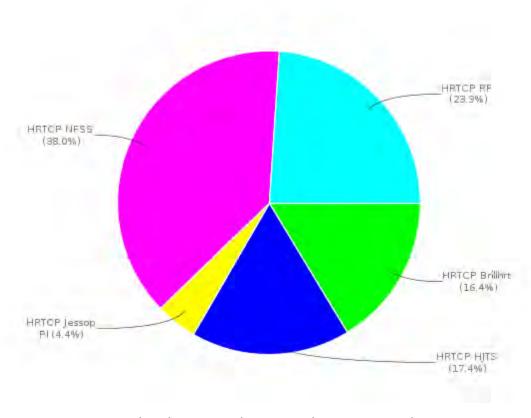


Counters were located along the Trail at New Freedom Station, Railroad, Hanover Junction, Brillhart Station, Jessop Place, and John Rudy County Park. Graphs below show the usage per counter location for 2017. To gather information, a laptop or docking station was used. By using a laptop or the docking station, the counters were left in the field from April through October.

## Trail Usage Distribution by Days of the Week



# Trail Usage Distribution by Trailhead Mainstem Heritage Rail Trail County park



HRTCP NFSS = Heritage Rail Trail County park New Freedom Station South

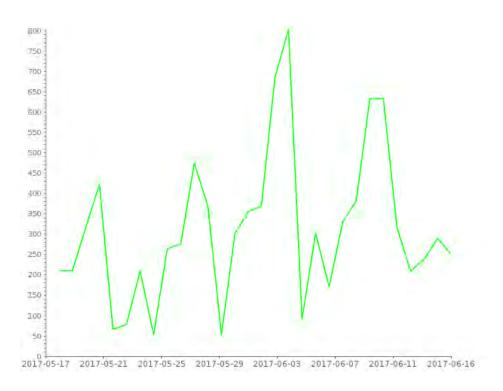
HRTCP RR = Heritage Rail Trail County Park Railroad

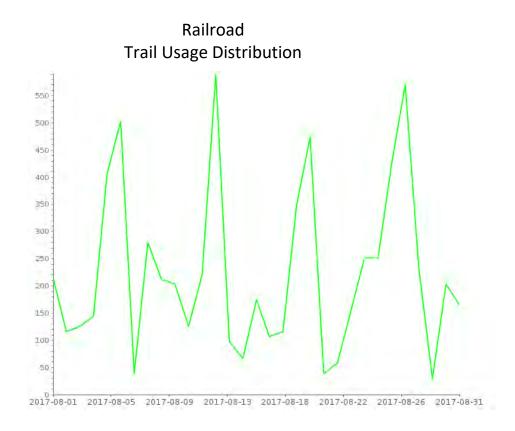
HRTCP Brillhrt = Heritage Rail Trail County Park Brillhart Station

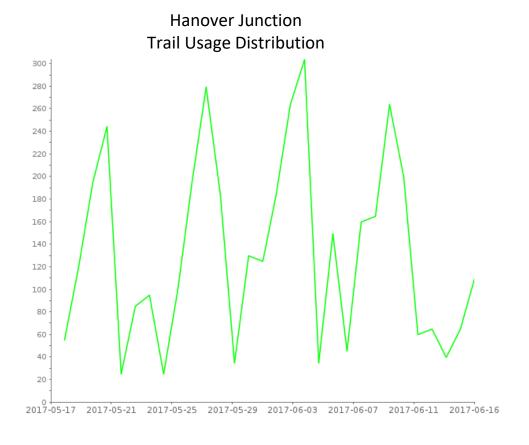
HRTCP HJST = Heritage Rail Trail County Park Hanover Junction Station

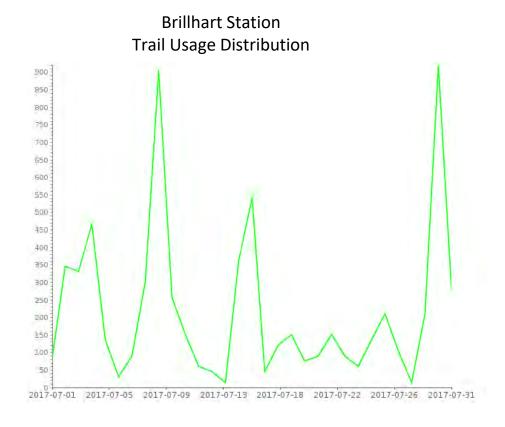
HRTCP Jessop = Heritage Rail Trail County Park Jessop Place

### New Freedom Station South Trail Usage Distribution







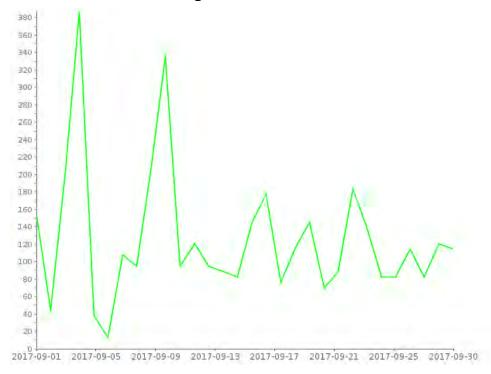


Jessop Place Trail Usage Distribution



Note the sharp drop in usage after York College of Pennsylvania the 2016-2017 academic year.

Northern Extension Rudy Park Trail Usage Distribution



## Appendix B – 2017 Trail User Survey Form



### 2017 Heritage Rail Trail County Park – User Survey

In order to provide you with a high quality experience, we are conducting a survey of trail users. Your cooperation in completing this survey will be greatly appreciated. One user per survey form please!

1. What is your zip code?
2. How often, on average, do you use the trail? (circle one response)  Daily More than twice a week Twice a week Once a week A couple of times a month Once a month A few times a year First time
3. Please identify your age group. (circle one response) 15 and under 16 to 25 26-35 36-45 46-55 56-65 66 or older
4. Were any children under the age of 15 with you on your trail experience today? Yes No
5. What is your gender? (circle your response) Male Female
6. What are your primary activities on the trail? (circle all that apply) Walking/ Hiking Biking Jogging/Running Horseback riding XC skiing Geocaching Nature study Wildlife viewing Fishing Other activity (please specify)
7. Has the trail had an influence on the type or frequency of activity you participate in? Yes No
8. Generally, when do you use the trail? (circle one response) Weekdays Weekends Both
9. How much time do you generally spend on the trail each visit? (circle one response) Less than 30 minutes 30 minutes to 1 hour 1 to 2 hours More than 2 hours
10. Would you consider your use of the trail to be for (circle one response)  Recreation Health and exercise Fitness training Commuting to work Commuting to school Other (specify)
11. During your trail visit did you (circle all that apply) Bird watch Watch wildlife Study wildflowers Geocache Visit museums Read interpretive signs Shop Other (please specify)
12. How did you find out about the trail? (circle all that apply) Word of mouth Roadside signage Driving past Newspaper Bike shop Tourist bureau Social media York Co. Parks brochure <a href="www.explorePAtrails.com">www.explorePAtrails.com</a> <a href="www.explorePAtrails.com">www.explorePAtrails.com</a> <a href="www.explorePAtrails.com">www.yorkcountytrails.com</a> <a href="www.explorePAtrails.com">www.explorePAtrails.com</a> <a href="www.explorePatrails.com">www.explorePatrails.co</a>
13. Has your use of the trail influenced your purchase of: (circle all that apply) Bike Bike supplies Auto accessories Footwear Clothing Nothing Other (please specify)
14. Approximately how much did you spend on the items above in the past year? \$

apply) Beverages Candy/Snack foods Sandwiches Ice cream Meals at a restaurant near the trail  Attraction admission  Retail store purchase None of these Other (please specify)
16. Approximately how much did you spend, per person, on the items above on your most recent visit?  \$
17. Did your visit to the trail involve an overnight stay in one of the following types of accommodations? (circle one response) Motel/Hotel Bed and Breakfast Friend or relatives home Airbnb/Private home Campground Other (please specify)
18. How many nights did you stay in conjunction with your visit to the trail?
19. Approximately how much did you spend on overnight accommodations per night? \$
20. In your opinion, the maintenance of the trail is (circle one) Excellent Good Fair Poor
21. In your opinion, the safety and security along the trail is (circle one) Excellent Good Fair Poor
22. In your opinion, the cleanliness of the trail is (circle one) Excellent Good Fair Poor
23. In your opinion, the trail's surface is (circle one) Excellent Good Fair Poor
24. Are you aware that the Heritage Rail Trail County Park connects to the 21 mile Torrey C. Brown Trail (NCR Trail) at the Maryland state line? (circle one) Yes No
25. What portion of the trail do you use most often? (circle all that apply) New Freedom to Railroad Railroad to Glen Rock Glen Rock to Hanover Junction Hanover Junction to Seven Valleys Seven Valleys to Glatfelters Station Glatfelters Station to Brillhart Station Brillhart Station to York College (Grantley Rd.) York College to York City Route 30 to Crist Memorial Field Crist Memorial Field to John Rudy Park
26. Which trail access point do you generally use when you visit the trail? (circle all that apply) New Freedom Railroad Glen Rock Hanover Junction Seven Valleys Glatfelters Station Brillhart Station York City (Pershing Ave.) Route 30  Crist Memorial Field Rudy Park Other (please specify the street)
27. Did your trail experience today begin and end at the same location? Yes No
28. Do you support the development of additional multi-use trails in York County (circle one) Yes No
Additional comments

### **CREDITS**



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