

Heritage Rail Trail County Park 2001 User Survey and Economic Impact Analysis



June 2002

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EXECUTIVE SUMMARY

The Heritage Rail Trail County Park has been fully opened over its 21 mile length for nearly three years. “The Trail”, as it is commonly referred to, was officially opened in August of 1999. The park runs from the Mason Dixon line (Maryland/Pennsylvania border) to the York, Pennsylvania’s Historic District. Along the route, the trail passes through the heart of York County’s rich farmland and historic villages.

The original Users Survey was launched in the spring of 1999, developed with the cooperation of the York County Rail Trail Authority and the York County Department of Parks and Recreation. The purpose of the study was two fold. First to determine the characteristics of the users of the rail trail and, secondly, to determine a baseline for the economic impact of the trail on York County.

During the summer of 2001 a follow-up study was conducted. This study utilized many of the same questions and the same methodology as the original 1999 survey. Like the original study, the 2001 survey was designed to monitor user characteristics and determine the economic impact of the Trail on York County. It also enables a comparative analysis with the 1999 survey to measure any changes in usage behavior.

Survey forms were available at all parking lots of the Heritage Rail Trail County Park and several retailers who cater to trail users. Completed responses were placed in collection boxes or mailed to the York County Parks office.

In all, 320 completed survey forms are included in this analysis.

While the majority of trail users reside in York County (64.6%), the trail has attracted users from the Philadelphia (2.66%), Harrisburg (4.56%), Lancaster (2.66%) and the Maryland/Virginia/Washington, DC metropolitan areas (10.65%). Riders from Florida, Colorado and California completed survey forms. More than 32% of the trail users traveled more than 20 miles to reach the trail.

Most frequent usage is one or two times a week or a few times during the year. More than 45% of the respondents reported that they were on the trail at least once a week.

More than 85% of the trail users are over the age of 35. Nearly 50% are between 36 and 55 years of age. With regard to gender, men use the trail (57.0%) somewhat more frequently than women (42.95%).

Biking is the predominant form of recreation on the rail trail. Nearly 80% of the respondents indicated biking as their primary activity. A trip to the trail for most users involves the investment of more than an hour of walking or biking. More than 50% of the users spend at least two hours on the trail during an outing. Another 37.8% spend between one and two hours

The section of the trail that received the highest usage is between Hanover Junction and Richland Avenue (26.86%). The Glen Rock to Hanover Junction section of the trail was the second most active (19.41%). Morning is the most popular time of day to hit the trail for nearly 40% of the users. Weekend and weekday usage is evenly split.

Respondent’s knowledge of the trail came primarily from “word of mouth”. The coverage that the trail receives in the local newspapers was the second most important source of information. The Rails to Trail Conservancy, a national organization that promotes the development of rails to

trails, was the third most important source of information for the users of the Heritage Rail Trail County Park. Less than 10% of the users indicated that they found out about the trail from the York County Department of Parks and Recreation.

In terms of economic impact, 72% of the respondents indicated they had purchased “hard goods” in the past year in conjunction with their use of the trail. The majority of these purchases were bicycles and bike supplies that resulted in an average purchase amount of \$367.12. While these types of purchases are not annually recurring, even with the most conservative usage estimate they amount to millions of dollars in sales.

Even more significant is the purchase of “soft goods” (water, soda, candy, ice cream, lunches, etc.). 65.6% of the respondents indicated that they purchased these types of items on their most recent trip to the trail. The average purchase amount per person was \$8.33. Considering that the average user makes several trips to the trail on an annual basis, at the minimum these types of purchases are contributing several hundred thousand dollars to the York County economy. And, these types of purchases are recurring year after year. Only 15% of the respondents indicated that they did not make a purchase in conjunction with their use of the trail.

More than 2/3 of the respondents to this survey stated that the maintenance and cleanliness of the trail was excellent. More than 90% felt that safety and security along the trail was good to excellent.

HISTORIC 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 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 community efforts by citizens and organizations throughout the County, has converted this rail corridor into a unique recreational 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.

Construction of Phase III began in the fall of 1994. This 8.2-mile section would take the trail from New Freedom to Hanover Junction. Phase III opened on June 22, 1996. Parking lots were established at New Freedom, Railroad, Glen Rock and Hanover Junction.

The final phases of the construction of the trail would complete the link with the City of York. Phase IV, 8.5 miles, runs north from Hanover Junction to the village of Hyde.

In contrast to previously developed sections of the trail, Phase IV featured very few road crossings as it winds through the heart of south central York County. Three small railroad villages, Smysers Station (today known as Seven Valleys), Glatfelter Station and Brillharts Station, offer brief interruptions to a landscape of fields and woodlands. Construction began in the fall of 1998.

Phase V proceeds south from the southern terminus of the Codorus Bikeway Path in York to Hyde. This 1.5-mile section was 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. Restaurants, shops and York's famous Central Market are in close proximity to the trailhead in York. Construction began in May 1999.

The official opening of the Heritage Rail Trail County Park was held on August 29, 1999. The opening ceremonies were celebrated in conjunction with the York County's 250th Anniversary. A large contingent of trail users including runners, bikers, hikers and horseback riders proceeded along the new sections of the trail prior to the official ribbon cutting.

The York County Rail Trail Authority was honored as Conservation Organization of the Year at the Pennsylvania Wildlife Federation's 2000 Conservation Achievement Awards Banquet on April 18, 2000. In September 2000, the Heritage Rail Trail County Park hosted one leg of the "Governor's Ride".

With the completion of the trail in August 1999, it became part of the York County park system. The Heritage Rail Trail County Park is one of eight parks within the York County Department of Parks and Recreation.

Since the opening of the trail in August 1999, the Hanover Junction Train Station has been fully restored to its circa 1860's appearance. A museum on the first floor provides exhibits on the history of the station and the railroad. The exterior of the New Freedom Station has also been restored. Work on the interior restoration will begin during the second half of 2002. Restoration work is also scheduled for the Howard Tunnel.

LOCATIONAL ANALYSIS

Although the grade throughout the length of the trail is reasonably level, New Freedom is the highpoint of elevation, 818 feet above sea level. Traveling north from New Freedom the grade is slightly downhill to York at 400 feet above sea level.

The trail is a 10 foot wide compacted surface designed for bicycling, hiking, running, horseback riding, as well as winter sports such as cross country skiing and snow shoeing.

Facilities along the trail include benches, picnic tables and portable toilets. Communities along the trail offer more extensive facilities. Elmer's Store in Seven Valleys claims between 800 and 1,000 trail user customers on weekends.

Sections of the trail are adjacent to the south branch of the Codorus Creek, a cold water trout stream.

Other features of the trail include the New Freedom Train Station, the Hanover Junction Train Station and the Howard Tunnel, the oldest operational railroad tunnel in the nation.

Winding through the heart of York County the trail extends over twenty-one miles from the state line, where it joins Maryland's Northern Central Rail Trail, to the City of York's historic district.

The southern half of the trail, 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.

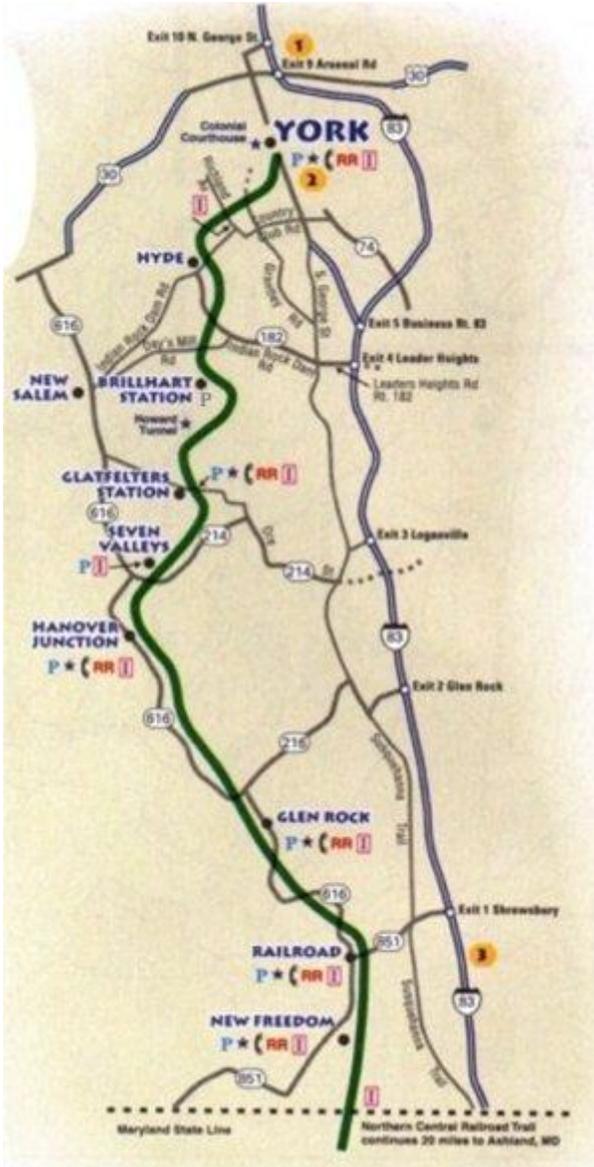
Trail Distances from the Maryland Line

Landmark	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

Parking lots are provided at New Freedom, Railroad, Glen Rock, Hanover Junction, Seven Valleys, Glatfelter Station, Brillharts Station (Days Mill Road) and Lafayette Plaza in York.

A map of the Heritage Rail Trail County Park and directions to the parking lots are provided on the following page.

HERITAGE RAIL TRAIL COUNTY PARK YORK COUNTY PENNSYLVANIA



York City - (From North) from I-83 use old exit #10 or new exit #22 (North George St.). Follow N. George St. south for approx. 3 miles to W. Philadelphia St. Turn right on W. Philadelphia St. Follow 2 blocks to Pershing Ave. Follow to Parking Area. (From South) From I-83 use old exit #5 or new exit #15 (S. George St.) Follow north approx. 3 miles to W. Princess St. Turn left on W. Princess St. Follow 2 blocks to Pershing Ave. Turn right on Pershing Ave. Follow 3 blocks to Parking Area. (For more info. on city parking go to www.yorkonline.org) (Free parking is available all on weekends and after 6 p.m. Low cost parking is available at all other times)

Brillharts Station - I-83 to old exit #4 or new exit #14 (Leader Heights Rd.) Follow Leaders Heights Rd. west approx. 1/2 mile to Indian Rock Dam Rd. Follow Indian Rock Dam Rd. approx. 2 miles. Turn left onto Days Mill Rd. Follow approx. 1 mile to parking lot. From Rt 30: Follow Rt. 616 south approx. 3 miles to George St. Turn left onto George St. (E) (In York New Salem). Follow George St. (E) approx. 1/2 mile. Turn right onto Days Mill Rd. Follow approx. 1 mile to parking lot on right.

Glatfelter Station - I-83 to old exit #3 or new exit #10 (Loganville) Follow signs to Rt. 214. Take Rt. 214 west for approx. 4 miles to Glatfelters Station Rd. Turn right on Glatfelters Station Rd. Parking area is approx. 1 mile on the right.

Seven Valleys - I-83 to old exit #3 or new exit #10 (Loganville) Follow signs to Rt. 214. Take Rt. 214 west to the borough of Seven Valleys. Parking lot is on right at Eysters machine Shop.

Hanover Junction - I-83 to old exit #3 or new exit #10 (Loganville). Follow signs to Rt. 214 west to for approx. 5 miles to Rt. 616 south (Right Turn) Follow Rt. 616 south. Parking lot is on the left. From Rt. 30: Take Rt. 616 south. Parking lot is approx. 6.5 miles on left.

Glen Rock - I-83 to Glen Rock old exit #2 or new exit #8(Glen Rock). Follow Rt. 216 west for approx. 4.5 miles to Glen Rock. Right on Water St. Cross railroad tracks and turn right. Follow for approx..1 mile, Rail Trail Parking lot is on the right.

Railroad - I-83 to old exit #1 or new exit #4(Shrewsbury). Take 851 West. Parking is 3 miles on the right.

New Freedom Station - I-83 to old exit #1 or new exit #4 (Shrewsbury). West on Rt. 851 to Railroad Borough. Turn left onto 851 West to New Freedom. Turn left on Franklin St. The parking lot is 1 block on the left corner of Front and Franklin Sts.

YORK COUNTY DEMOGRAPHICS

York County Demographic Profile 2000 Census

Population	381,751
Total Families	105,532
Median Household Income	\$43,488
Total Housing Units	156,720
Persons per household	2.52

Population Growth

	1990	2000	2010
York County	339,574	381,754	402,486

Tourism Generated Dollars 2000

Total Tourism Expenditures	\$754,087,000
Tourism Related Employment	14,279

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 that are most likely to effect 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.

QUALITATIVE VALUES OF THE HERITAGE RAIL TRAIL COUNTY PARK

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 2001 Trail User Survey forms.

“The Rail Trail is a York County Treasure”.

“This Trail is a wonderful addition to York County.”

“Our experience will encourage us to continue using it and share with family and friends.”

“Local hospitality is wonderful. This is a great trail. Thanks!”

“From Baltimore to York this is a truly wonderful trail especially appreciated by two southern Californians who purposely chose the trail as part of a bicycle tour/vacation of the southeastern Pennsylvania region.”

“Most enjoyable experience.”

“Wonderful facility!”

“We need more trails like this one.”

“This trail enhances the quality of life for many people in York County.”

“We have visited the trail at least once a month since 1999. Out of all the trails we have been to, we rate yours is #1. In fact, I carry a couple of your brochures in my bike bag and distribute them to other riders when asked about good locations to visit. The two hour drive from Philadelphia is always worth it.”

“We love the trail – great job!”

“Love the trail the picnic tables and benches are great.”

“Bought bike just for trail.”

“First time visit enjoyed very much. We’ll be back!”

“I’ve ridden many rail trails. This is a gem!”

“The trail is wonderful, very well maintained – a real gem for York County.”

“We live in the Florida Keys and plan our 3 month vacations around Rail Trails. PA has some of the best. Our second visit to this trail. Won’t be our last.”

“Excellent trail. Well maintained and clean.”

“This trail is the best anyone has ever done for seniors.”

“We’re very grateful for the trail which provides many pleasurable weekends of recreation...”

“Living close to the trail (1/2 mile) is one of the reasons my husband and I decided to move to Glen Rock.”

“You are to be commended for all of the benches and picnic tables along the trail. Trail surface is good. We love this trail.”

An indication of the popularity of the Heritage Rail Trail County Park is the diversity of organizations that have used the trail as a focal point of their activities. They include:

Master Gardeners

March of Dimes

Southern Community Services

Southern York County Regional Recreation Board

Cystic Fibrosis Foundation

Historic York

York County Convention and Visitors Bureau

Northern Central Railway

York Hiking Club

York Roadrunners

Bureau of State Parks

York Cancer Center

American Lung Association

Community Church Witness Council

Baltimore Road Runners

Maryland State Parks

2001 SURVEY RESULTS

Question 1.

How far is your residence from the Trail? (check one)

3.42%	Adjacent to the Trail
32.92%	1 - 5 miles from the Trail
31.37%	6 - 20 miles from the Trail
32.30%	Greater than 20 miles from the Trail

Question 2.

What is your ZIP Code?

64.60%	York County
10.65%	Maryland/ Virginia/ Washington, CD
2.66%	Lancaster County
4.56%	Harrisburg Metro
2.66%	Philadelphia Metro
15.13%	All other areas

Question 3.

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

3.12%	Daily
17.73%	Between 3 and 5 times a week
19.94%	1 or 2 times a week
5.30%	Once a week
14.64%	A couple of times a month
5.30%	Once a month
19.63%	Few times a year
14.33%	First time

Question 4

How many people typically use the Trail with you? (check one)

19.63%	Use the Trail alone
50.78%	One other person
21.18%	2 - 3 other people
5.30%	4 or 5 other people
2.13	More than 5 other people

Question 5.

Please identify your age group. (Check one)

3.43%	under 15
2.49%	16 to 25
7.48%	26 – 35
21.81%	36 – 45
26.48%	46-55
26.17%	56-65
12.15%	66 or older

Questions 6.

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

14.68%	Walking/hiking
77.98%	Biking
7.03%	Jogging/running
0.31%	Horseback riding
0.00%	Cross country skiing
0.00%	Other

Question 7.

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

49.07%	Weekdays
50.93%	Weekends

Question 8.

What time of the day do you generally use the Trail?

39.94%	Morning
29.27%	Afternoon
12.50%	Evenings
18.29%	Anytime

Question 9.

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

11.84%	Maryland Line to New Freedom
15.02%	New Freedom to Railroad
15.38%	Railroad to Glen Rock
19.41%	Glen Rock to Hanover Junction
26.86%	Hanover Junction to Richland Avenue
11.48%	Richland Avenue to Downtown York

Question 10.

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

0.00%	Less than 30 minutes
11.88%	30 minutes to 1 hour
37.81%	1 to 2 hours
50.31%	More than 2 hours

Question 11.

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

9.51%	New Freedom
9.68%	Railroad
9.86%	Glen Rock
15.32%	Hanover Junction
7.22%	Seven Valleys
5.81%	Glatfelter Station
15.49%	Brillharts Station (Days Mill Road)
7.75%	Drover's Bank at Richland Avenue (no longer available)
7.92%	Downtown York
11.44%	None of these

Question 12.

How did you find out about the Trail?

41.23%	Word of mouth
3.06%	Roadside signage
6.69%	Driving past
16.43%	Newspaper
9.47%	York County Parks Department
13.37%	Information from Rails to Trails Conservancy
4.46%	Internet web site
2.79%	Bike shop
2.23%	Tourist Information Center

Question 13.

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

27.34%	Bike
32.31%	Bike supplies
7.46%	Running/walking/hiking shoes
12.43%	Clothing
20.46%	Nothing

72.2% of the sample responded that their use of the Trail had influenced a purchase of one of these items.

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 \$367.12.

This average is influenced by the purchase of some very expensive bicycles costing more than \$1,000 each.

Question 15.

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

29.46%	Bottled water/soft drinks
16.67%	Candy/snack foods
8.91%	Sandwiches
9.88%	Ice cream
13.76%	Lunch at a restaurant along the Trail
2.71%	Film
18.60%	None of these

65.6% of the sample responded that their use of the Trail had influenced the purchase. OF one of these items.

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 \$8.33.

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

Question 17.

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

64.89%	Excellent
32.92%	Good
1.88%	Fair
0.31%	Poor

Question 18.

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

49.05%	Excellent
44.30%	Good
5.38%	Fair
1.27%	Poor

Question 19.

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

67.92%	Excellent
27.04%	Good
3.77%	Fair
1.26%	Poor

Question 20.

Are you aware that the York County Parks Department publishes a newsletter?

34.59%	Yes
64.41%	No

Question 21.

What is your gender?

57.04%	Male
42.95%	Female

METHODOLOGY AND ANALYSIS

The survey form was developed with input from the York County Rail Trail Authority, the York County Department of Parks and Recreation and the York County Planning Commission. 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. Local merchants also participated in the distribution of survey forms. Survey forms were available to trail users from July through October 2001.

For the purpose of this analysis, 320 survey forms were completed.

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 320 usable surveys.

The following analysis will utilize the 1999 survey data and the 2001 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.

COMPARATIVE ANALYSIS 1999 AND 2001 SURVEYS

Question 1.

How far is your residence from the Trail? (check one)

1999		2001
5.87%	Adjacent to the Trail	3.42%
31.66	1 -5 miles from the Trail	32.92%
31.87%	6 - 20 miles from the Trail	31.37%
30.61%	Greater than 20 miles from the Trail	32.30%

The only significant change in the distance that users travel to get to the trail is the reduction in the number of “Adjacent” users. The other percentage changes are only minor in nature.

Even though users from the City of York and its surrounding suburbs, who used to drive to New Freedom, Railroad, Glen Rock or Hanover Junction to access the trail, now have points much closer to home, Lafayette Plaza in downtown York and Brillharts Station on Days Mill Road. It would appear that they still travel to some of the more outlying parking facilities to begin their trip on the trail.

It is of interest to note that the percentage of users traveling more than 20 miles increased slightly. These users represent Maryland residents who are driving or riding into York County. The publicity the trail has generated is also attracting users from surrounding counties and more distant states.

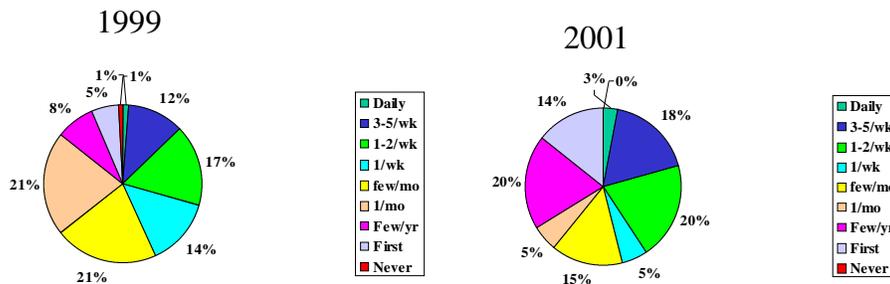
Question 2.

What is your ZIP Code?

1999		2001
62.70%	York County	64.60%
18.43%	Maryland/Virginia/Washington, DC	10.65%
6.52%	Lancaster County	2.66%
4.64%	Harrisburg Metro	4.56%
2.47%	Philadelphia Metro	2.66%
2.70%	All other areas	15.13%

The vast majority of trail users are what could be termed “day users”. The distance they travel would not require an overnight stay. Users from the Philadelphia and DC metro areas, where the drive time to access the trail could exceed two hours each way, may be staying in the area overnight. Promotion of the trail as a recreational resource in more distant markets may in the future increase the number of overnight tourists visiting York County.

HOW OFTEN DO YOU USE THE TRAIL?



Question 3.

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

1999		2001
1.82%	Daily	3.12%
11.78%	Between 3-5 times a week	17.73%
16.27%	1 or 2 times a week	19.94%
13.28%	Once a week	5.30%
21.20%	A couple of times a month	14.64%
21.41%	Once a month	5.30%
5.14%	Few times a year	19.63%
8.14%	First time	14.33%
5.42	Average Trips Per Year	6.65

With access to the trail closer to York, the percentage of frequent users (more than once a week) has increased substantially. The average number of trips per year (which was calculated) increased from 5.4 to 6.65. It is interesting that two years after the trail opened there are still a lot of new users.

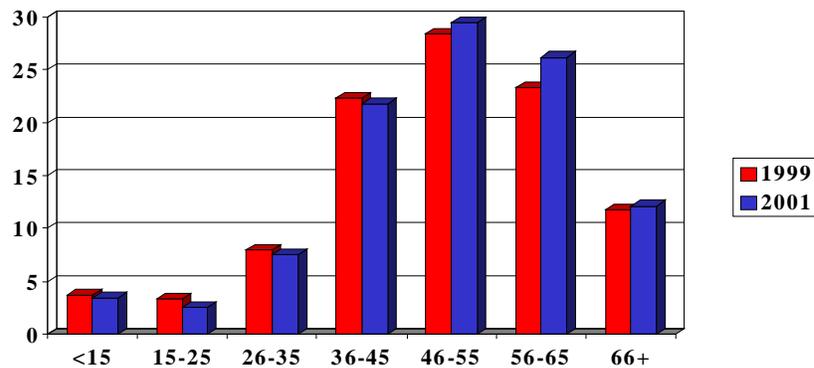
Question 4.

How many people typically use the Trail with you? (check one)

1999		2001
17.36%	Use the Trail alone	19.63%
47.07%	One other person	50.78%
24.90%	2 - 3 other people	21.18%
7.92%	4 or 5 other people	5.30%
2.71%	More than 5 other people	2.13%

There was no significant change in the number of people that use the trail together. It appears generally to be couples or family groups. There have been a number of highly successful fund raising activities on the trail over the past two years that attract large groups of users. A March of Dimes event during 2002 attracted more than 700 walkers and raised more than \$132,000.

PLEASE IDENTIFY YOUR GROUP.



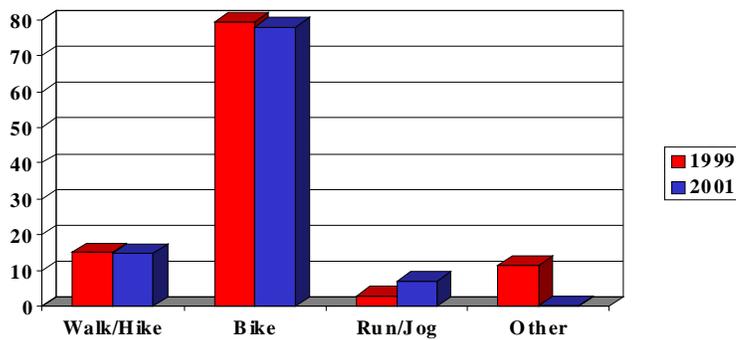
Question 6.

Please identify your age group. (Check one)

1999		2001
3.72%	under 15	3.43%
3.33%	16 to 25	2.49%
7.92%	26 – 35	7.48%
22.31%	36 – 45	21.81%
28.381%	46-55	26.48%
23.29%	56-65	26.17%
11.74%	66 or older	12.15%

The vast majority of trail users are over the age of 35. This age profile is nearly identical to the profile of Maryland’s NCR Trail users from research conducted in 1994. There is no significant change in this dynamic between the 1999 and 2001 studies.

WHAT IS YOUR PRIMARY ACTIVITY ON THE TRAIL?



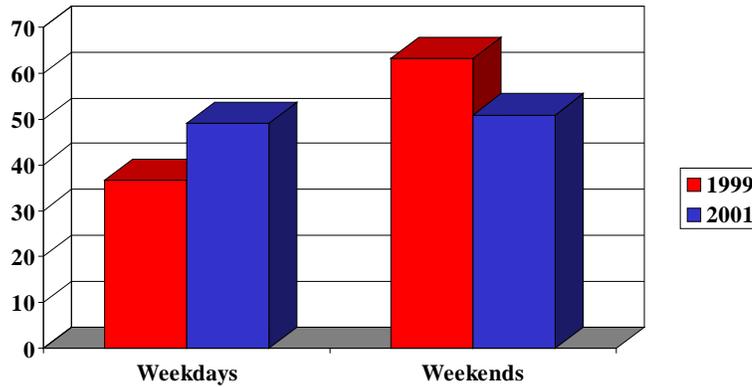
Questions 7.

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

1999		2001
15.13%	Walking/hiking	14.68%
79.57%	Biking	77.98%
2.95%	Jogging/running	7.03%
0.98%	Horseback riding	0.31%
9.98%	Cross country skiing	0.00%
0.42%	Other	0.00%

The Heritage Rail Trail County Park is primarily used as a bicycle path. Comparing these findings with the purchases in Question 14, most were bikes and bike supplies, which helped account for the high average dollar value. During the 1999 survey the primary “Other” activity was cross country skiing. The winter of 2000/2001 didn’t provide a decent snow pack to support this type of activity. During a winter that provides a good base of snow, cross country skiing and snowshoeing may be more actively pursued along the trail.

GENERALLY, WHEN DO YOU USE THE TRAIL?



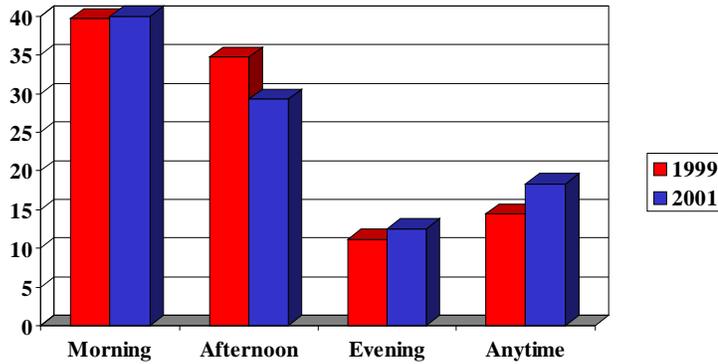
Question 8.

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

1999		2001
36.72%	Weekdays	49.07%
63.28%	Weekends	50.93%

In 2001 weekday and weekend usage were nearly identical. In the previous survey there was a 1/3 to 2/3 split. This may be due to the closer access to York and its suburbs that would allow users to get to the trail more frequently before or after work/school during the week.

WHAT TIME OF DAY DO YOU GENERALLY USE THE TRAIL?



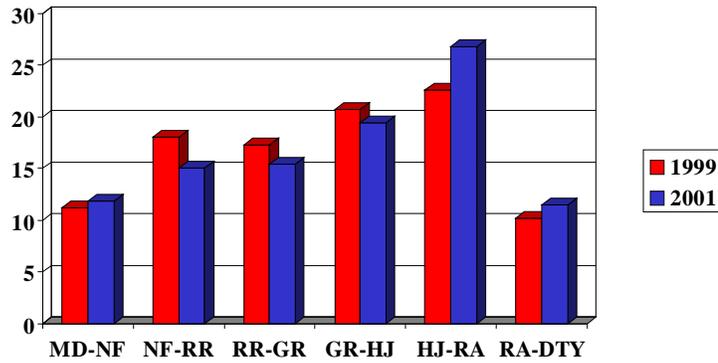
Question 9.

What time of the day do you generally use the Trail?

1999		2001
39.67%	Morning	39.94%
34.73%	Afternoon	29.27%
11.15%	Evenings	12.5%
14.44%	Anytime	18.29%

Responses to Questions 8 and 9 reflect a shift in usage following the opening of parking facilities closer to York and its suburbs. While morning is the generally preferred time to “hit the trail”, with easier access more users get on the trail in the evenings or anytime the opportunity presents itself.

WHAT PORTION OF THE TRAIL DO YOU USE MOST OFTEN?



Key to chart above:

MD = Maryland Line

NF = New Freedom

RR = Railroad

GR = Glen Rock

HJ = Hanover Junction

RA = Richland Ave.

DTY = Downtown York

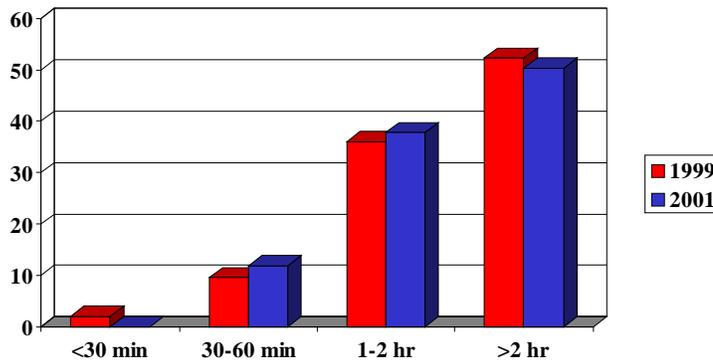
Question 10.

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

1999		2001
11.2%	Maryland Line to New Freedom	11.84%
18.0%	New Freedom to Railroad	15.02%
17.3%	Railroad to Glen Rock	15.38%
20.72%	Glen Rock to Hanover Junction	19.41%
22.6%	Hanover Junction to Richland Avenue	26.86%
10.2%	Richland Avenue to Downtown York	11.48%

Many of the respondents use multiple sections of the trail. In many cases all of the responses were checked, indicating regular use of all sections. The section of the trail in the rural area closest to York and its suburbs receives the heaviest usage due primarily to the fact that it takes less time to get to the trail.

HOW MUCH TIME DO YOU GENERALLY SPEND ON THE TRAIL ON EACH VISIT?



Question 11.

How much time do you generally spend on the Trail on each visit? (check one)
(Percents; Counts)

1999		2001
2.1%	Less than 30 minutes	0.00%
9.6%	30 minutes to 1 hour	11.88%
36.0%	1 to 2 hours	37.81%
52.24	More than 2 hours	50.31%

Nearly 90% of the respondents spend more than an hour on the trail each time they make a trip. This further supports the use of multiple sections of the trail on a single trip. Most users are cyclists who even at a modest pace could cover 7 to 10 miles in an hour taking them through at least two of the sections provided as possible responses.

Question 12.

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

1999		2001
13.8%	New Freedom	9.51%
10.2%	Railroad	9.68%
11.0%	Glen Rock	9.86%
35.0%	Hanover Junction	15.32%
	Seven Valleys	7.22%
	Glatfelter Station	5.81%
0.8%	Hyde	
2.9%	Brillharts Station (Days Mill)	15.49%
0.8%	Indian Rock Dam Road	
12.6%	Drover's Bank at Richland Avenue	7.75%
10.2%	Downtown York	7.92%
2.9%	None of these	11.44%

Hanover Junction is one of the most popular parking areas; it is approximately in the middle of the trail and provides user with the ability to travel up to 10 miles in either direction. The Brillharts Station lot was opened in 2001 and is very popular for users from the York area. It allows for a pleasant ride through the country only a few miles from the city limits. The parking lots opened after the 1999 study at Seven Valleys, Glatfelter Station and Brillharts Station have been successful in helping to spread out where users access the trail. The parking lot at the Drover's Bank on Richland Avenue is currently unavailable to trail users. A new parking facility may be developed in this area in the future.

Question 13.

How did you find out about the Trail?

1999		2001
39.2%	Word of mouth	41.23%
3.6%	Roadside signage	3.06%
7.7%	Driving past	6.96%
18.5%	Newspaper	16.43%
6.1%	York County Parks Department	9.47%
14.9%	Information from Rails to Trails Conservancy	13.37%
2.3%	Internet web site	4.46%
5.4%	Bike shop	2.79%
2.3%	Tourist Information Center	2.23%

Word of mouth is the single greatest source of information regarding the Heritage Rail Trail County Park. Local newspaper coverage provided the second most important source of information regarding the trail. Information from the Rails to Trails Conservancy was cited as the third most important source of information.

HERITAGE RAIL TRAIL COUNTY PARK USER ESTIMATE

During September of 2001, the York County Department of Parks and Recreation undertook a significant project to get a first valid 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. Samples were taken at eight different parking lots during six times periods over the course of the entire month. During the weekends efforts were made to sample in every time period on both Saturday and Sunday. During the week, samples were taken randomly during various times and various weekdays.

A methodology was developed to extrapolate the samples into an estimate of the number of total users during the month of September. The following table summarizes the results of the analysis.

Heritage Rail Trail County Park Parking Lot Sample September 2001

	Sample Weekday Users	Sample Weekend Users	Normalize Data Factor Weekdays	Normalize Data Factor Weekends	Estimated Monthly Users
Lafayette Plaza*		945		1.39	1,314
Richland Avenue**	113	1815	6.67	1.36	3,222
Brillharts Station	957	2,998	2.86	1.11	6,065
Glatfelter Station	172	190	2.38	1.92	774
Seven Valleys	237	363	2.35	1.54	1,116
Hanover Junction	534	1,389	2.72	1.22	3,147
Glen Rock	180	429	3.33	1.25	1,136
Railroad	430	804	2.5	1.2	2,040
New Freedom***	180	429	3.33	1.25	1,136
Total Estimated Users					19,949

* The Lafayette Plaza parking lot in downtown York is only available for Rail Trail Users on weekends.

** The Richland Avenue lot at the former Drover's and Mechanics Bank Operations Center was only available for use after 6:00 p.m. on weekdays and on weekends.

*** No parking lot sampling was conducted in the borough of New Freedom due to the difficulty is sorting out Rail Trail users from cars parked by local residents. For the purpose of this analysis, it was assumed that the number of users in New Freedom would be similar to the number of users in Glen Rock. New Freedom also receives a large number of users who park at one of the NCR Trail lots in Maryland and ride north.

Based upon the parking lot surveys there were 19,949 trail users during the month of September 2001. However, from Question 11 of the survey we know that 11.44% of the users do not access the trail from any of the designated parking lots. These trail users may live close enough to the trail to walk or bike to it. There are users of the NCR Trail in Maryland that bike north onto the Heritage Rail Trail. Thus, the estimate from the parking lot survey needs to be increased by 11.44%. The result is an projection of 22,231 users during September 2001.

Utilizing data collected by the York County Department of Parks and Recreation from mechanical traffic counters on the entrance roads of several other county parks, an annual user distribution was developed. It was assumed that the usage of the Heritage Rail Trail County Park would be similar to other parks within the system. Traffic counts were only available for the period March through November. An assumption was made that there is still activity of the Heritage Rail Trail during December, January and February so some small percentage of the overall yearly usage was assigned to these months. The following table provides the results of this analysis.

Projection of 2001 Heritage Rail Trail County Park Users

	Monthly Usage Factor	Estimated Monthly Usage
January	.01	2,470
February	.02	4,940
March	.07	17,290
April	.11	27,170
May	.13	32,110
June	.15	37,050
July	.14	34,580
August	.14	345800
September	.09	22,230
October	.08	19,760
November	.04	9,880
December	.02	4,940
Annual Usage Estimate for 2001		247,000

To provide a reference in terms of the volume of usage on the Heritage Rail Trail, the following historic attendance figures for the NCR Trail in Maryland were obtained from the Maryland Department of Natural Resources

NORTHERN CENTRAL RAIL TRAIL ATTENDANCE BY YEAR

YEAR	ATTENDANCE
1984	9,820
1985	38,085
1986	47,933
1987	41,430
1988	Not available
1989	91,658
1990	130,165
1991	125,291
1992	170,565
1993	249,413
1994	457,540
1995	337,673
1996	444,642
1997	190,892*
1998	196,820*
1999	365,720

Maryland Department of Natural Resources

*The methodology used in 1997 was changed and this led to a much lower figure. The 1997 result was used as a base for the 1998 estimate. In 1999 the Department noticed the aberration and returned to the original methodology. There are no other indicators (concession sales, parking, etc.) that would point to much lower usage in 1997 or 1998. A DNR spokesperson believes that the 1999 estimate is also low.

In just two years since the formal ribbon cutting of the Heritage Rail Trail, this York County recreational asset has achieved a level of usage that took the NCR Trail in Maryland nearly a decade to obtain. The rapid adoption of the Heritage Rail Trail can be attributed to a number of factors some of which include:

- The trail has an excellent surface and is well maintained.
- Early users spread the word on what a great recreational facility the trail is.
- Bikers and hikers from the York area had used the NCR Trail in Maryland.
- Extensive coverage in the local newspapers during construction of the trail

Economic Impact

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 southern York County. From the Whistle Stop Bike Shop in New freedom to numerous refreshment stands along its length, the trail has ignited an entrepreneurial spirit along its course. Bill Elmer, owner of Elmer’s Store in Seven Valleys, PA made a significant investment to attract trail users including the construction of bike racks and picnic tables. In a recent newspaper interview Bill stated that the store gets between 800 and 1,000 trail user visitors every weekend. He recently retired and sold the store to a new owner who bought the property primarily to cater to trail users. The New Freedom Hotel will be refurbished and converted into a bed and breakfast inn adjacent to the trail. The Cycle Inn, a bed and breakfast, opened near the Brillharts Station parking lot in 2000. There are new businesses in downtown York that are catering to the trail user crowd. The York Rotary Club has raised more than \$7,000 for a trail “beautification” project.

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 14.

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

<u>1999</u>		<u>2001</u>
29.6%	Bike	27.34%
31.2%	Bike supplies	32.31%
6.0%	Running/walking/hiking shoes	7.46%
13.4%	Clothing	12.43%
17.2%	Nothing	20.46%

In 2001, 72.2% of the sample responded that their use of the Trail had influenced a purchase of the types of items listed above.

Question 15.

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

<u>1999</u>		<u>2001</u>
\$337.14	Average hard goods purchase	\$367.12

This average is influenced by the purchase of some very expensive bicycles costing more than \$1,000 each.

Question 16.

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

<u>1999</u>		<u>2001</u>
27.2%	Bottled water/soft drinks	29.46%
16.2%	Candy/snack foods	16.67%
8.4%	Sandwiches	8.91%
8.9%	Ice cream	9.88%
47.6%	Lunch at a restaurant along the Trail	13.76%
2.7%	Film	2.71%
20.2%	None of these	18.60%

65.6% 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 there trail experience.

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

<u>1999</u>		<u>2001</u>
\$6.74	Average soft goods purchase	\$8.33

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

When the purchase of hard goods and soft goods are combined fully 85% of the survey respondent trail users bought something in conjunction with their use of the trail.

The following chart takes the 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 Economic Impact Analysis

				Annual Users			
				100,000	200,000	250,000	300,000
Category	% Usage	Avg. \$	# of Trips				
Hard Goods*	72.2%	\$367.12		\$26,506,064	\$53,012,128	\$66,265,160	\$79,518,192
Soft Goods	65.6%	\$8.33	6.6	\$3,749,434	\$7,498,867	\$9,373,584	\$11,248,300

Hard Goods = (% Usage X Avg. \$ X Annual Users)*

Soft Goods = (% Usage X Avg. \$ X # of Trips X Annual Users)

* Major hard good purchases such as a bike may be replaced every 3 to 5 years. Running shoes may be replaced every couple of months.

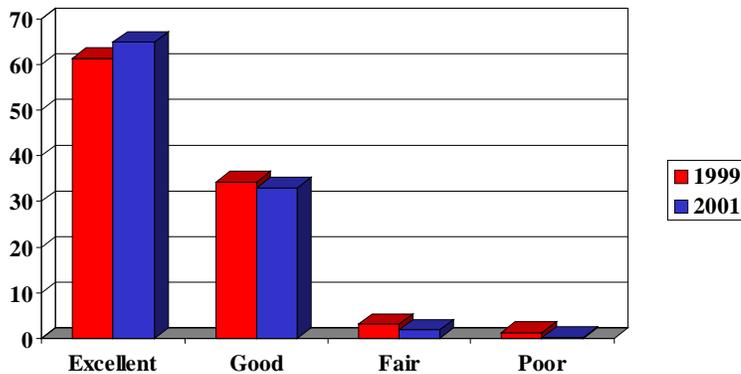
TRAIL MAINTENANCE, SECURITY AND CLEANLINESS

The 1999 survey was conducted just prior to and after the opening of the final phases of the construction of the Heritage Rail Trail County Park. Thus, it established a benchmark

for how users perceive the trail in terms of maintenance, security and cleanliness. The 2001 survey included these questions to provide feedback to the York County Department of Parks and Recreation on how they were doing, form a user’s perspective, in keeping the facility up to the standards that the users expect.

How the Heritage Rail Trail County Park is maintained will have a significant impact on the economic contributions it makes to York County. As it exists today one user rated it as one of the top five best gravel surface trails in the country. That kind of reputation will attract users from near and far.

IN YOUR OPINION, THE MAINTENANCE OF THE TRAIL IS...



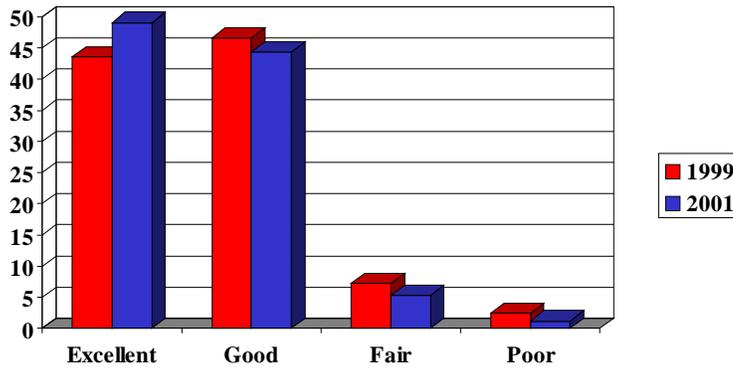
Question 17.

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

1999		2001
61.3%	Excellent	64.89%
34.2%	Good	32.92%
3.2%	Fair	1.88%
1.4%	Poor	0.31%

Most trail users rate the maintenance of the trail as excellent. This high standard has been maintained over the first two years of the trails existence. A well maintained trail adds to the enjoyment of the user experience, brings regular users back, and attracts new users.

IN YOUR OPINION, THE SAFETY AND SECURITY ALONG THE TRAIL IS...



Question 18.

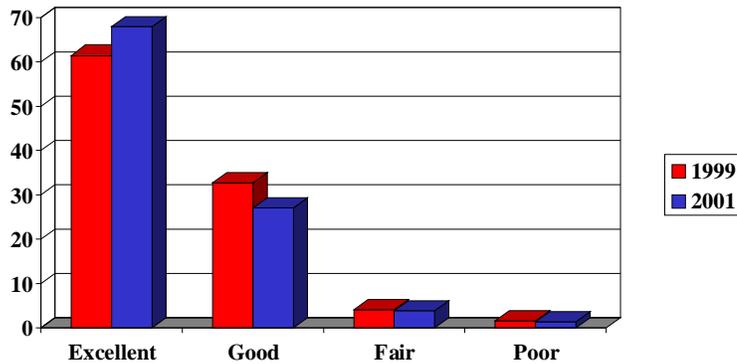
In your opinion, the safety and security along the Trail is (check one)

(Percents)

1999		2001
43.6%	Excellent	49.05%
46.56%	Good	44.30%
7.3%	Fair	5.38%
2.5%	Poor	1.27%

Security has not been an issue along the Heritage Rail Trail County Park to date. User respondents are fairly evenly split between Excellent and Good in the two surveys. There was a slight improvement toward excellent in the 2001 survey, but it is not statistically significant.

IN YOUR OPINION, THE CLEANLINESS OF THE TRAIL IS...



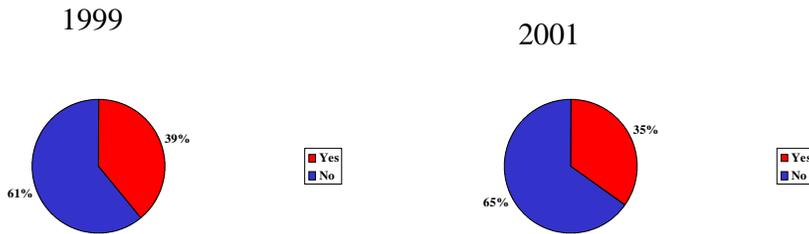
Question 19.

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

<u>1999</u>		<u>2001</u>
61.5%	Excellent	67.92%
32.8%	Good	27.04%
4.1%	Fair	3.77%
1.6%	Poor	1.26%

Users of the trail rate its cleanliness very high. This is as much a credit to the users of the trail as to any other factor. Generally the users respect the park and the open space through which they travel. Often users can be seen picking up after someone who was not as respectful of the environment as they should have been. The decision to make the trail a “pack out what you pack in” facility has resulted in a much cleaner environment.

ARE YOU AWARE THAT THE YORK COUNTY PARKS DEPARTMENT PUBLISHES A NEWSLETTER?



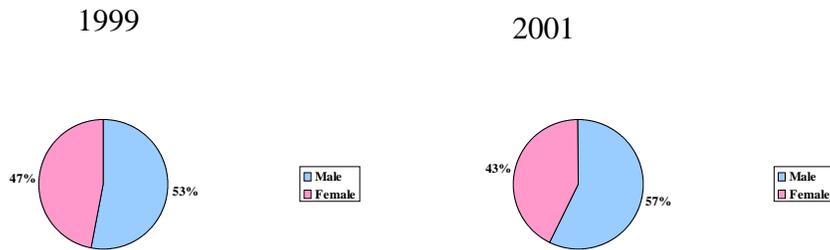
Question 20.

Are you aware that the York County Parks Department publishes a newsletter?

<u>1999</u>		<u>2001</u>
39.1%	Yes	34.59%
60.9%	No	64.41%

The York County Department of Parks and recreation has done an excellent job of attracting users to the Heritage Rail Trail County Park. Articles in the local newspapers provide information regarding events being held on the trail. The Park's newsletter would be another excellent way to provide information to trail users. Unfortunately most trail users aren't aware that Park's publishes a newsletter. Efforts are being made to increase awareness but it will be a long term proposition.

WHAT IS YOUR GENDER?



Question 21: What is your gender?
(Percents; Counts)

<u>1999</u>		<u>2001</u>
53.1%	Male	57.04%
46.9%	Female	42.95%

Slightly more men use the trail (or at least complete the survey forms) than women. Considering the size of the sample the change from 1999 is not significant.