



Heritage Rail Trail County Park
2012 User Survey
And Economic Impact Study



Contents



Executive Summary.....	2
Historical Perspective.....	5
Location Analysis	7
Heritage Rail Trail County Park Map.....	9
York County Demographics & Climate.....	10
Community Involvement.....	11
Qualitative Values (Survey Comments)	12
2012 Survey Results.....	13
Methodology and Analysis.....	19
Comparative Analysis.....	20
Heritage Rail Trail County Park User Estimates.....	29
Economic Impact Analysis.....	31
Trail Maintenance, Security and Cleanliness.....	37
Appendix A – Trail Counter Data.....	41
Appendix B – 2012 RT Survey Form.....	43



This report was developed with funding assistance from York County Community Foundation and technical assistance from the Rails-to-Trails Conservancy: Northeast Regional Office and the York County Rail Trail Authority.

Photographs are courtesy of: York County Department of Parks & Recreation and the York County Rail Trail Authority.

Executive Summary



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. Much of the Heritage Rail Trail lies within the County-owned corridor and contains the tracks of the Northern Central Railroad (the rails no longer exist along the Maryland trail). The historic sites of Howard Tunnel and train stations at New Freedom and Hanover Junction are also located within the corridor.

2012 marked the thirteenth anniversary of the opening of the Heritage Rail Trail County Park. Since its completion in August of 1999, the trail has been managed by the York County Department of Parks and Recreation. Development of a northern extension to the rail trail, extending the trail from York City approximately 6 miles north along the Codorus Creek to John Rudy County Park in East Manchester Township, began in 2003. Under the direction of the York County Rail Trail Authority, a 1.5 mile section of trail is complete.

This 2012 User Survey and Economic Impact Analysis was preceded by similar studies in 1999, 2001, 2004, and 2007. Each survey was designed to monitor trail user characteristics and the economic impact of the rail trail. In many ways the 2012 survey was very much like the previous surveys. The methodology for collecting the data was, for the most part, identical in all five surveys. 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.

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 (www.railstotrails.org/resources/documents/rresource_docs/User_SurveyMethodology.pdf). Analysis of the data accumulated from the infrared counters and the completed surveys received from visitors indicates an estimated 281,145 annual visits to the Heritage Rail Trail County Park, resulting in a total economic impact in 2012 of over \$4.4 million into the local economy.

Many of the questions on all five 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 determine, some questions were changed, deleted or added. Overall, the data from the five studies are very comparable and in the analysis section of this report, where applicable, the data from the five surveys is presented in a comparison analysis.

In all, 336 completed survey forms are included in the 2012 analysis.

While the majority of trail users reside in York County (68.1%), the trail has attracted users from Maryland/Virginia/Washington, DC metropolitan areas (19.7%), Lancaster County (5.6%), Harrisburg metro area (1.2%) and the Philadelphia metro area (1.5%). In addition, riders from other areas accounted for 3.9% of the survey respondents in the 2012 study.

The ratio of men to women using the trail was 56% male, 44% female.

For many of the survey respondents, trail usage is a frequent occurrence. More than 38% of the respondents use the trail several times each week; 27.2% reported visiting once a week or several times per month. Less frequent usage, once per month (5.3%), and a few times a year (18.6%) still point to the trail as a regular activity. First time users accounted for 10.4% of all respondents, indicating a continued growth in the number of visitors.

Approximately 87% of the trail users are over the age of 35, with the most represented age groups being 46-55 (25.1%) and 56-65 (32.2%). Children under the age of 15 account for 21% of the users. This age profile has been very consistent over the five 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. 54.9% of respondents indicated that their primary activity on the trail is biking, compared to 71.7% in 2007. The use of the trail for walking/hiking increased to 24.8% and running/jogging nearly doubled since 2007 to 10.2%. Nature study (4.0%) and cross-country skiing (1.3%) both increased since 2007, and for the first time geocaching was reported by 0.4% of the visitors and fishing by 0.8% of visitors. Horseback riding remained fairly unchanged from 0.8% in 2007 to 0.6% in 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 (14.7% and 14.1% respectively). Hanover Junction Train Station was the next most popular parking facility (12.1%), followed by Glen Rock (11.2%). Parking areas in York City and along the newest sections of the northern extension received a combined 10% of all visitors, with York City showing a slight increase over 2007.

New for 2012, visitors could indicate both weekday and weekend usage (48.6%). Weekday users were 17.2%, and weekend users 34.2%. Survey respondents make a significant time commitment when they venture out on the Heritage Rail Trail. 38% are on the trail for more than 2 hours and nearly 40% 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. 58.7% of the survey respondents consider their use of the trail for health and exercise (an increase of nearly 14% from 2007). Another 8.6% use the trail for fitness training. 31.7% of the respondents consider their use of the trail as recreational.

Also new for 2012, visitors were asked to report on any ancillary activities while on the trail. 39.4% reported bird or wildlife-watching; 10.8% studied wildflowers; 19.2% visited the museums at the train stations; 18.4% read the interpretive signs along the trail.

As in past surveys, respondent's knowledge of the trail came primarily from "word of mouth" (35.7%). Similarly, road-side signage and simply "driving past" informed 20.7% of the visitors about the trail. The third most important source for information was the York County Parks brochure and its website (16.2%), while other on-line sources provided information to 4.5% of visitors. York County Convention & Visitors Bureau was reported as the information source by 1.9% 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 \$356.59, nearly identical to that reported in 2007. Over the five surveys, this figure has not varied more than \$30.00.

The purchase of consumables or "soft goods" (water, soda, candy, ice cream, lunches, etc.) was reported by nearly 69%, compared to 72% in 2007. The average expenditure per person per trip was reported at \$13.28, compared to \$12.66 in 2007 – evidencing a certain level of consistency.

5.7% of the respondents indicated that their visit to the trail involved an overnight stay. On average they spent \$92.67 on overnight accommodations, up from \$51.15 in 2007.

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 2012, the user rating for maintenance was virtually identical to 2007; perceptions of safety and security increased slightly; cleanliness increased over 5%. In all three categories, 94% to 98% 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.

New to the 2012 survey, respondents were asked if they were aware of the Heritage Rail Trail's connection to Maryland's Torrey C. Brown Trail. 91.5% responded yes.

The final question on the survey dealt with the importance of trails. Similar to previous years, over 96% of respondents supported the development of additional multi-use trails in York County.

In conclusion, the Heritage Rail Trail County Park continues to attract an increasing number of users who regularly visit the trail as a means of improving their health and fitness. The 2012 survey and its four 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 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 rail 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 rail 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 Avenue 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), Glatfelters 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". The solitude of the rural countryside lends way to the energy of York City 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 250th 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 eleven 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 and Rails-to-Trails Conservancy.

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 Registry of Historic Places. A series of interpretive signs along the trail inform visitors of the rail trail's historic past, such as Civil War events, the rise and fall of mills and other businesses that once thrived along the rails, and natural geological features.

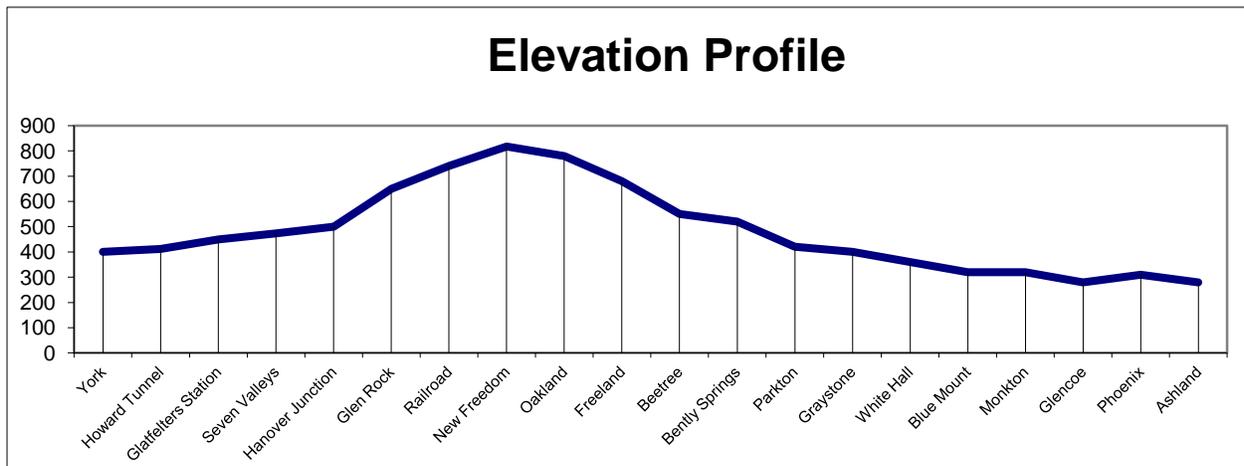
In 2003, York County Rail Trail Authority conducted a feasibility study to assess the opportunities to extend the Heritage Rail Trail County Park through York City along the Codorus Creek to make a connection approximately six miles north at John Rudy County Park in East Manchester Township. In November 2006, construction of this Northern Extension of HRTCP began at John Rudy County Park with a destination of connecting in York City.

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 twenty-one 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. They 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.

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

Heritage Rail Trail County Park Map



2012HTR/ppp/mf/L/12

Heritage Rail Trail County Park
176 acres
Completed 1999



Total Distance Between Maryland Line and these Parking Lots

York City	21.1 Miles
Brillhart Station	17 Miles
Glatfelters Station	13.5 Miles
Seven Valleys	11 Miles
Hanover Junction Station	10.5 Miles
Glen Rock	6.25 Miles
Railroad	3 Miles
New Freedom Station	1.5 Miles

Legend

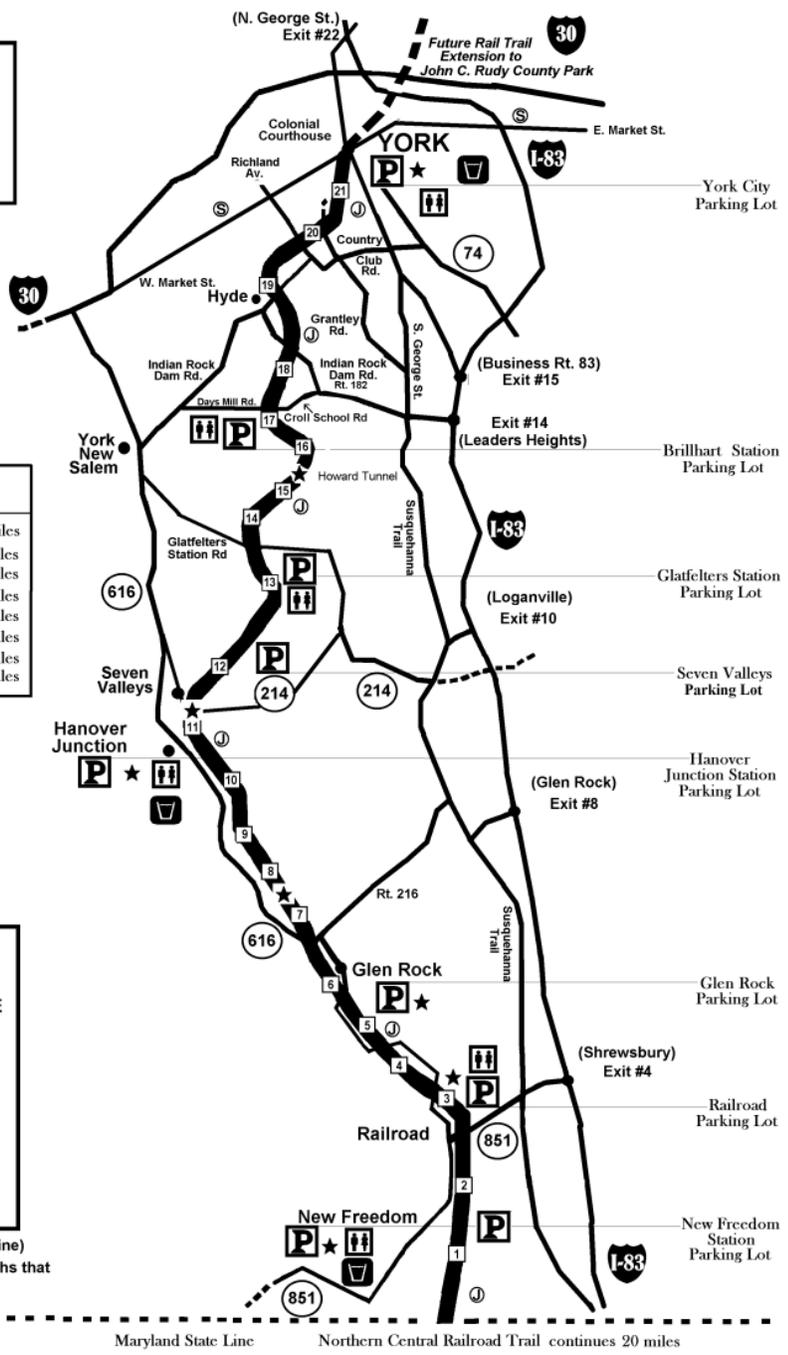
0 1 2
Scale - Miles

Total Trail Length - 21.10 miles

Parking	Historic Sites
Restrooms	Mile Markers
Drink	PA State Bike Routes
	Bike Route
	Bike Route

(mile markers are accurate from the MD line)
The S & J Routes are state wide bike paths that travel through York County.

Directions to Rail Trail Parking Lots



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

York County Demographics & Climate



York County Demographic Profile*

Population	436,770
Per Capita Income	\$27,196
Median Household Income	\$57,494
Total Housing Units	178,671
Persons Per Household	2.52

Source: US Department of Commerce, United States Census Bureau 2011

York County Climate

Source: National Weather Service

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 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. Volunteer tasks include gardening at Hanover Junction/New Freedom train stations, litter clean up, park ambassadors, program leaders and 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 2012, they include:

York College
Southern Community Services “Walk the Line”
Jewish Family Services “Walk a Thon”
York Hiking Club
City of York “River Walk Festival”
York County Senior Citizen Games
York County Library System
York Road Runners – “York Ten Miler” and Winter Series Runs
York Cancer Center “Bike a Thon” “Fundraiser Walk”
York Diabetes Association “Americas Walk”
Boy Scouts of America
Girl Scouts of America
New Freedom Heritage Incorporated “Farmers Market”
30th Street Entertainment
Bob Potts Marathon
New Freedom Volksmarch
YWCA “8th Annual Ladies Sprint Triathlon”
Active Minerals International LLC
West Liberty Child Development Center
Arc of York County
Central Penn Business Institute “Walk/Run/Ride
Servants “5K Fundraiser”
York College of PA Alumni “Alumni 5K Fun Run”
Jefferson Area Crop Walk

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 2012 Trail User Survey forms:

"My 4 yr. old says more bridges & tunnels, please."

"The trail is a valuable asset to York Co. I wish I lived closer to it."

"The museum was excellent."

"This Rail to Trail is one of my favorites in the state. Keep up the good work"

"We live near York & really enjoy the natural beauty of the trail without danger of traffic on the roads."

"I rode this trail for 5 yrs as a York Co resident now a MD resident I travel about 50 min. to continue riding it. I used the NCR Trail (Maryland) 3 times this spring. It is not even close in quality & enjoyment as the Heritage Trail."

"Best part of living in York County!"

"I bought a house based on how close it was to the rail trail. It is key to my emotional/mental health."

"Excellent use of my tax dollars"

"The trail is a treasure for the area. Enhances our living in Glen Rock"

"Look forward to connection to John Rudy"

"So happy for this trail. We used the trail for a group walk to support the Epilepsy Foundation in honor of Jayce Thayer."

In 2011 and 2012, York County Parks faced numerous severe weather events including the Flood of 2011 that eroded the rail trail surface in several locations. Several comments reflected the challenge of maintaining the trail surface:

"Trail seems a bit thin in gravel & mud rutted at some spots, looks like it needs some touch up."

"I hope you continue to repair all the washed out areas from last fall's storms also looking forward to the extension to York from Rudy."

2012 Survey Results



Question 1.

What is your ZIP Code?

- 68.1% York County
- 17.9% Maryland
 - 1.8% Virginia/Washington, DC
 - 5.6% Lancaster County
 - 1.2% Harrisburg Metro
 - 1.5% Philadelphia Metro
- 3.9% All other areas

Question 2.

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

- 7.1% Daily
- 19.5% Between 3 and 5 times a week
- 11.8% 1 or 2 times a week
- 13.6% Once a week
- 13.6% A couple of times a month
- 5.3% Once a month
- 18.6% Few times a year
- 10.4% First time

Question 3.

Please identify your age group. (Check one)

- 2.9% under 15
- 3.8% 16 - 25
- 5.9% 26 - 35
- 13.9% 36 - 45
- 25.1% 46 - 55
- 32.2% 56 - 65
- 16.2% 66 or older

Question 4.

Were any children under the age of 15 with you on your trail experience today?

- 21.0% Yes
- 79.0% No

Question 5.

What is your gender?

56.0%	Male
44.0%	Female

Questions 6.

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

24.8%	Walking/hiking
54.9%	Biking
10.2%	Jogging/running
0.6%	Horseback riding
1.3%	Cross country skiing
0.4%	Geocaching
4.0%	Nature study
0.8%	Fishing
2.9%	Other

Question 7.

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

84.3%	Yes
15.7%	No

Question 8.

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

17.2%	Weekdays
34.2%	Weekends
48.6%	Both

Question 9.

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

1.2%	Less than 30 minutes
20.9%	30 minutes to 1 hour
39.9%	1 to 2 hours
38.0%	More than 2 hours

Question 10.

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

31.7%	Recreation
58.7%	Health and Exercise
8.6%	Fitness Training
0.5%	Commuting
0.0%	Walking to school
0.5%	Other

Question 11.

During your trail visit did you?

15.5%	Bird watch
23.9%	Watch wildlife
0.0%	Geocache
10.8%	Study wildflowers
19.2%	Visit Museums
18.4%	Read interpretive signs
6.6%	Shop
5.7%	Other

Question 12.

How did you find out about the Trail?

35.7%	Word of mouth
7.7%	Roadside signage
13.0%	Driving past
6.6%	Newspaper
4.9%	Bike Shop
1.9%	York County Convention and Visitors Bureau
1.1%	Facebook
9.4%	York County Parks Brochure
1.5%	www.ExplorePAtrails.com
1.9%	www.TrailLink.com
6.8%	www.yorkcountyparks.org
9.4%	Other

Question 13.

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

23.6%	Bike
29.1%	Bike supplies
2.6%	Auto Accessories
13.9%	Running/walking/hiking shoes
17.3%	Clothing
11.0%	Nothing
2.4%	Other

Question 14.

Approximately how much did you spend on the items above in the past year?

The average for those who indicated they had made a purchase was \$356.59.

Question 15.

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

20.3%	Bottled water/soft drinks
11.0%	Candy/snack foods
7.0%	Sandwiches
13.9%	Ice cream
14.5%	Meals at a restaurant along the Trail
0.2%	Bike rental
2.0%	Other
31.1%	None of these

Question 16:

Approximately how much did you spend per person on the items above?

The average for those who indicated they had made a purchase was \$13.28.

Question 17.

Did your visit to the Trail involve an overnight stay in one of the following types of accommodations? *(Percentages reflect 20 surveys that had a response for this question.)*

52.6%	Motel/Hotel
10.5%	Bed and Breakfast
15.8%	Friend or Relatives Home
15.8%	Campground
5.3%	Other

Question 18.

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

Average 1.8 *(20 respondents provided overnight stays.)*

Question 19.

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

The average expenditure per night was \$92.67 *(15 respondents provide spending data)*

Question 20.

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

53.2%	Excellent
41.4%	Good
5.1%	Fair
0.3%	Poor

Question 21.

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

55.2%	Excellent
39.0%	Good
4.6%	Fair
1.2%	Poor

Question 22.

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

64.0%	Excellent
34.5%	Good
1.2%	Fair
0.3%	Poor

Question 23.

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

37.6%	Excellent
53.3%	Good
8.0%	Fair
1.2%	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?

91.5%	Yes
8.5%	No

Question 25.

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

14.1%	New Freedom to Railroad
13.5%	Railroad to Glen Rock
12.2%	Glen Rock to Hanover Junction
14.9%	Hanover Junction to Seven Valleys
13.3%	Seven Valleys to Glatfelters Station
13.9%	Glatfelters Station to Brillhart Station
9.8%	Brillhart Station to York College (Grantley Rd.)
4.9%	York College to York City
3.4%	Rudy Park to Crist Field

Question 26.

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

14.7%	New Freedom
10.0%	Railroad
11.2%	Glen Rock
12.1%	Hanover Junction
8.7%	Seven Valleys
10.4%	Glatfelters Station
14.1%	Brillhart Station
5.0%	York City, Pershing Ave.
3.9%	Rudy Park
1.1%	Crist Field
8.7%	Other

Question 27.

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

96.2%	Yes
3.8%	No

Methodology and Analysis



The survey form was developed by the York County Department of Parks and Recreation with the assistance of the York County Rail Trail Authority and Rails-to-Trails Conservancy. 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.

Survey forms were available to trail users during most of the summer of 2012. For the purpose of this analysis, 336 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 336 usable surveys.

The following analysis will utilize the 1999, 2001, 2004 and 2007 survey data and the 2012 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 and 2012 SURVEYS

Question 1.

What is your ZIP Code?

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

The most significant change regarding where the participants live is the decrease in the number of trail users from the Maryland/Virginia/DC area. Most of the decline was from Maryland users which may suggest that the northern end of the adjacent Torrey C. Brown Trail is getting less usage.

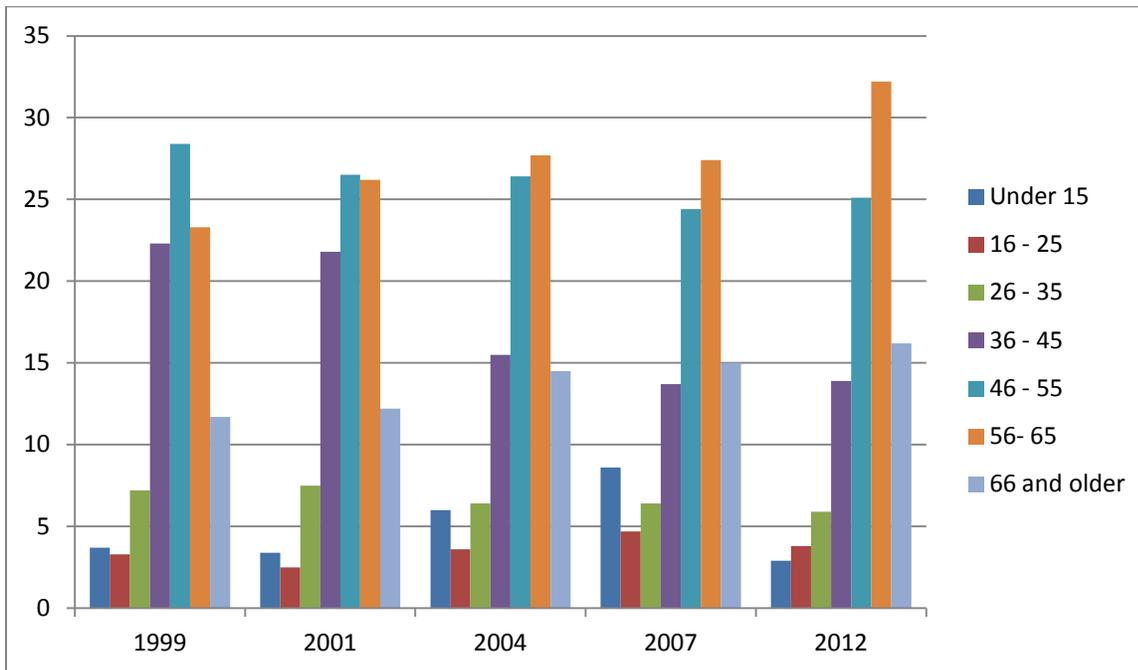
Question 2. How often, on average, do you use the Trail? (Check one)

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

Note the increase in the number of survey participants indicating that they use the trail more than two days a week. It is interesting that 13 years after the trail opened there are still a lot of new users.

Question 3.

Please identify your age group. (Check one)



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

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.

Question 4.

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

	2007	2012
Yes	25.4%	21.0%
No	74.6%	79.0%

This question was added to the survey in 2007. The result is fairly consistent from 2007 to 2012.

Question 5:

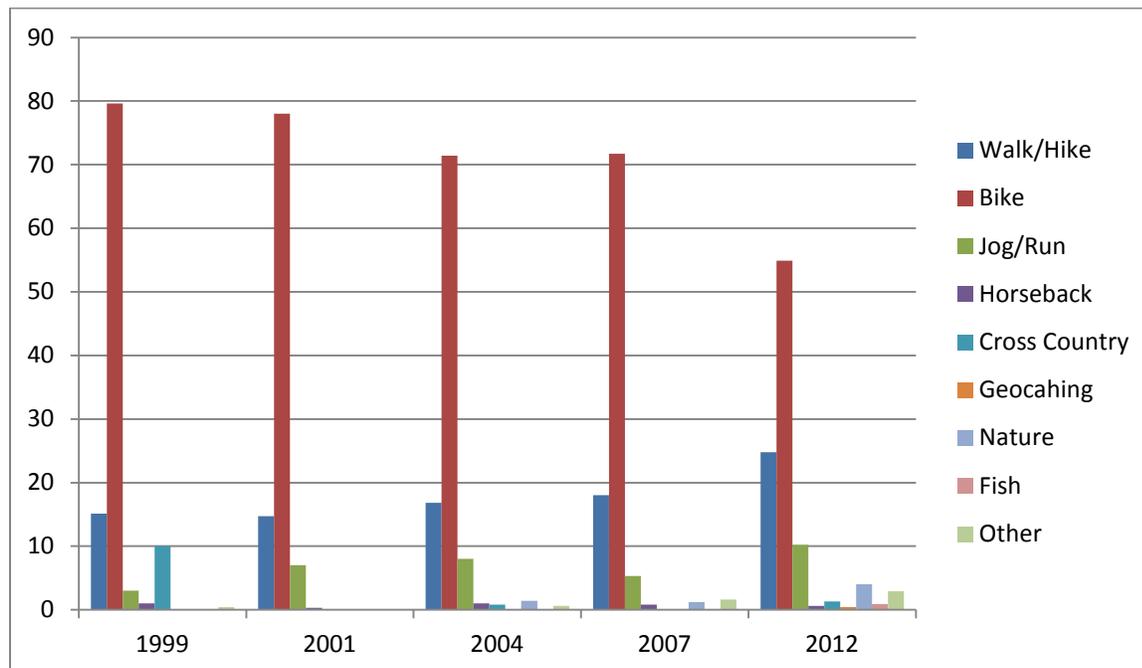
What is your gender?

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

The percentage of men using the trail decreased slightly over what was reported by respondents in previous surveys. The percentage of female responding to the survey increased after declines from 1999 to 2007

Questions 6.

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



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

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. Also, the percentage of equestrian users seems to have settled in at under 1%. "Nature study" was included as a separate primary activity in 2004 and increased significantly from the 2007 survey. 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
Yes	84.3%
No	15.7%

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 out of doors.

Question 8.

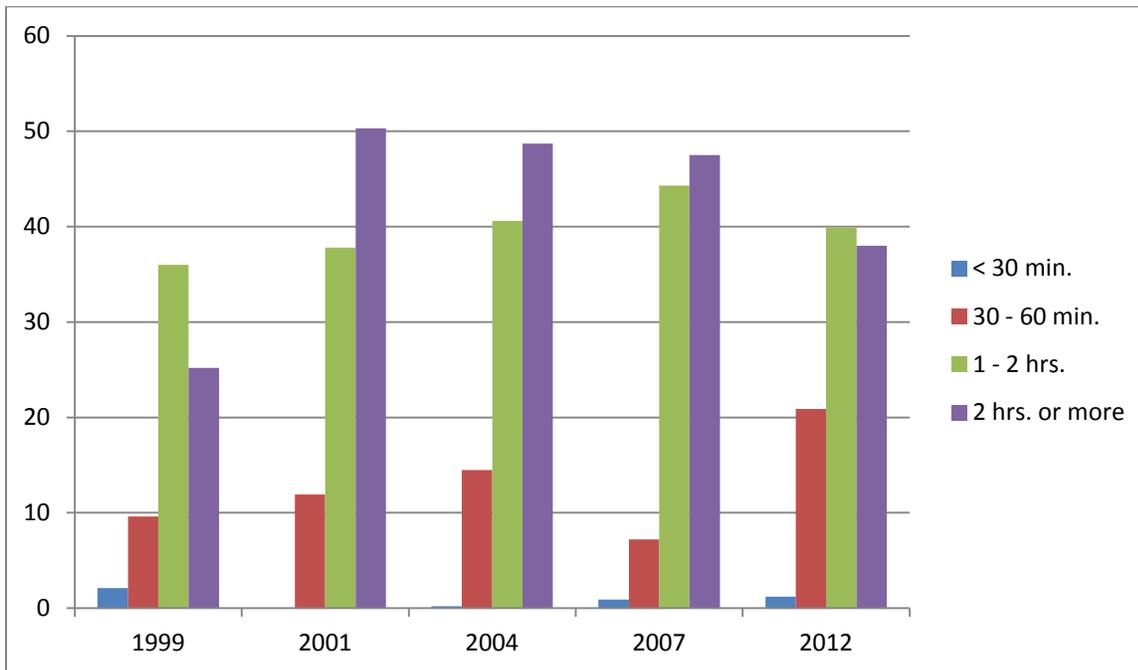
Generally, when do you use the Trail? (check one)

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

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 or the 2007 survey. The dramatic shift from weekend or weekday use to both from the 2004 survey to the 2012 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)

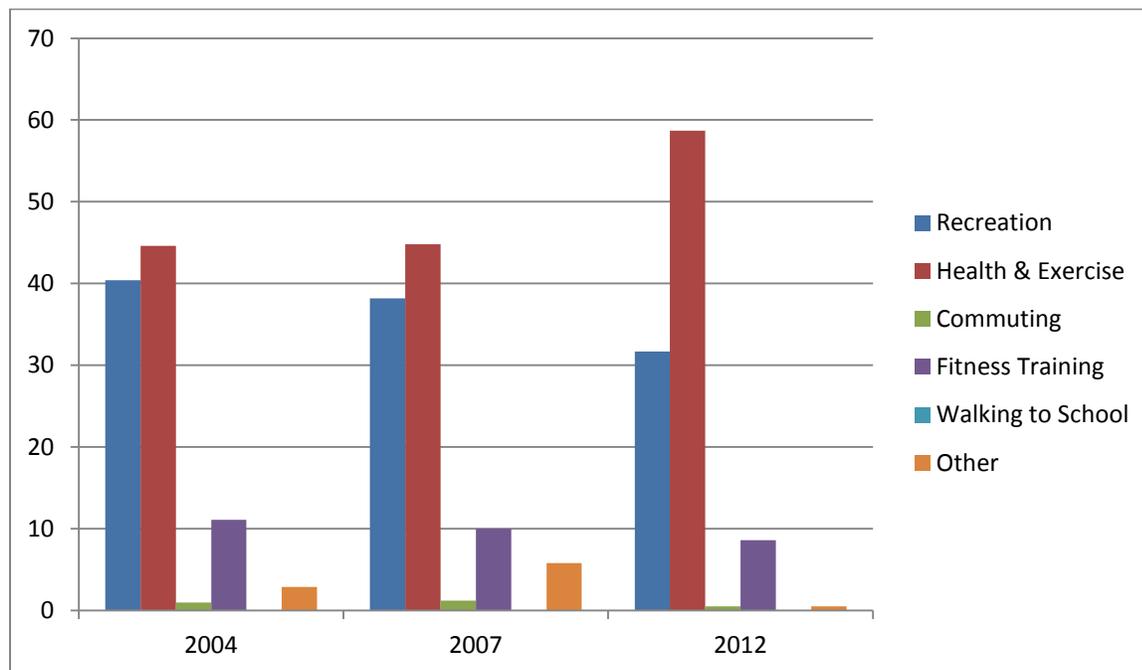


	1999	2001	2004	2007	2012
Less than 30 minutes	2.1%	0.0%	0.2%	0.9%	1.2%
30 minutes to 1 hour	9.6%	11.9%	14.5%	7.2%	20.9%
1 – 2 hours	36.0%	37.8%	40.6%	44.3%	39.9%
2 hours or longer	25.2%	50.3%	48.7%	47.5%	38.0%

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 hike on the trail.

Question 10.

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



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

Use of the Heritage Rail Trail for exercise and to improve ones health has increased significantly since this question was added to the survey in 2004. In other surveys conducted in Pennsylvania by Rails-to-Trails Conservancy, health and exercise also dominate the response to this question.

Question 11.

During your visit did you...

	2012
Bird Watch	15.5%
Watch wildlife	23.9%
Geocache	0.0%
Study wildflowers	10.8%
Visit museums	19.2%
Read interpretive signs	18.4%
Shop	6.6%
Other	5.7%

Question 12.

How did you find out about the Trail?

	1999	2001	2004	2007	2012
Word of mouth	39.2%	41.2%	42.1%	41.9%	35.7%
Roadside signage	3.6%	3.1%	4.7%	3.5%	7.7%
Drive past	7.7%	7.0%	12.2%	5.0%	13.0%
Newspaper	18.5%	16.4%	12.3%	8.8%	6.6%
Bike shop	5.4%	2.8%	5.2%	6.1%	4.9%
York County Convention and Visitors Bureau	NA	NA	1.9%	0.8%	1.9%
Tourists information center	2.3%	2.2%	1.3%	1.9%	NA
Facebook	NA	NA	NA	NA	1.1%
York County Parks brochure	NA	NA	NA	NA	9.4%
York County Parks Department	6.1%	9.5%	7.3%	5.4%	NA
www.ExplorePAtrails.com	NA	NA	NA	NA	1.5%
www.TrailLink.com	NA	NA	NA	NA	1.9%
Rails-to-Trails Conservancy	14.9%	13.4%	9.2%	6.1%	NA
www.yorkcountyparks.org	NA	NA	NA	NA	6.8%
Internet web site	2.3%	4.5%	3.9%	5.4%	NA
Other	NA	NA	NA	15.3%	9.4%

Word of mouth continues to be the single greatest source of information regarding the Heritage Rail Trail. Roadside signage and driving past increased significantly between 2007 and 2012. 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, replies of "Internet web site" increased from 2.3% in 1999 to 5.4% in 2007. Looking at the four new web sources in 2012 the percentage is 11.3% 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 information flow

Questions 13 – 23 are addressed in a later section of this report.

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
Yes	91.5%
No	8.5%

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

Question 25.

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

	2012
New Freedom to Railroad	14.1%
Railroad to Glen Rock	13.5%
Glen Rock to Hanover Junction	12.2%
Hanover Junction to Seven Valleys	14.9%
Seven Valleys to Glatfelters Station	13.3%
Glatfelters Station to Brillhart Station	13.9%
Brillhart Station to York College	9.8%
York College to York City	4.9%
Rudy Park to Crist Field	3.4%

The southern half of the trail, New Freedom to Hanover Junction, is much more popular than the northern segment. With the development of the northern extension this trend may be reversed.

Question 26.

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

	1999	2001	2004	2007	2012
New Freedom	13.8%	9.5%	9.8%	13.4%	14.7%
Railroad	10.2%	9.7%	9.9%	8.2%	10.0%
Glen Rock	11.0%	9.9%	8.8%	10.9%	11.2%
Hanover Junction	35.0%	15.3%	15.8%	17.6%	12.1%
Seven Valleys	NA	7.2%	10.5%	10.9%	8.7%
Glatfelters Station	NA	5.8%	9.8%	8.9%	10.4%
Hyde	0.8%	NA	NA	NA	AN
Brillhart Station	2.9%	15.5%	20.8%	15.3%	14.1%
Indian Rock Dam Road	0.8%	NA	NA	NA	NA
Drover's Bank on Richland Ave.	12.6%	7.8%	NA	NA	NA
York City (Pershing Ave.)	10.2%	7.9%	6.1%	3.5%	5.0%
Rudy Park	NA	NA	NA	NA	3.9%
Crist Field	NA	NA	NA	NA	1.1%
Other	NA	NA	3.6%	11.4%	8.7%
Maryland	NA	NA	4.4%	NA	NA
None of These	11.4%	NA	NA	NA	NA

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 southern end of the trail in New Freedom, Glen Rock and Hanover Junction. Brillhart Station has seen a decrease in usage. This may be attributed to the popularity of this site and that on weekends it can be extremely crowded. 5% of the survey respondents are using the northern extension which is very encouraging with this project still in development. As noted in the table some of the original trail access points have been closed, such as the Drover's Bank parking lot at Richland Avenue which is now a WellSpan facility that prohibits trail user parking.

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.

A follow-up user count has not been conducted since the original effort. However, the average trips per user are a value that has been consistently determined between the 2001 and 2007 studies.

In 2001, it was calculated that the average user visited the trail 6.6 times. 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.

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 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 user visits, 10.55, we can estimate the number of annual user visits in 2007 at 394,823.

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 one just south of the Brillhart Station Trailhead, one just north of the Hanover Junction Trailhead and one just north of the Railroad Trailhead between January 1 and April 30. 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.

Full month data was available from each of these locations. Using Rails-to-Trails Conservancy's Trail User Count Extrapolation Model which utilizes counter data from trails across the United States representing 47 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 Trail User Visits Estimate 2012								
	Actual Count	Annual Estimate		Adjusted for Passing Multiple Counters		Adjusted for Missing Counts		Adjusted for Out and back Trips
Railroad	6,313	52,667		41,680		50,016		26,258
Seitzland	2,424	28,801		22,793		27,351		14,359
Hanover Junction	8,120	66,002		52,233		62,679		32,907
Glatfelters Station	6,165	53,516		42,351		50,821		26,681
Howard Tunnel	2,786	33,102		26,196		31,436		16,504
Brillhart Station	12,868	104,595		82,775		99,329		52,148
Grantley	7,684	64,105		50,731		60,878		31,961
Uncounted Users*								80,327
Estimated Total								281,145

*Note:

The infrared counters do not fully account for users who come to the Heritage Rail Trail. There are several areas where visitors would not pass a counter. For example from the data, it shows that 17.9% of the trail user survey respondents indicated a Maryland ZIP code. It is highly plausible that a number of these users start at Ashland Road or Monkton, get to New Freedom, enjoy lunch or ice cream and then return to the point of origination. Thus, they never passed one of the counters deployed during 2012. The same applies to Pennsylvania residents that start from New Freedom (14.7% of survey respondents) and travel south to a destination in Maryland. It is recommended that during the summer of 2013 that an infrared counter be deployed south of New Freedom in order to develop an estimate that would capture these additional trail users. A counter was also not deployed between the trail terminus in York and Grantley Avenue and between Railroad and New Freedom. Therefore an assumption was made regarding uncounted users based on the percentage of users that indicated they used these segments of the Heritage Rail Trail County Park.

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
Bike	29.6%	27.3%	26.0%	27.4%	23.6%
Bike Supplies	31.2%	32.3%	26.8%	26.8%	29.1%
Auto accessories	NA	NA	15.3%	13.5%	2.6%
Running/walking/hiking shoes	6.0%	7.5%	1.1%	9.5%	13.9%
Clothing	13.4%	12.4%	15.5%	13.7%	17.3%
Nothing	17.2%	20.5%	14.2	10.4%	11.0%
Other	NA	NA	NA	NA	2.4%

In 2012, 89.0% 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 2007 response rate. There has been some shifting 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.

Question 14.

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

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

This number has remained remarkably consistent over the five 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
Bottled water/soft drinks	27.2%	29.5%	26.5%	25.8%	20.3%
Candy/snack foods	16.2%	16.7%	12.5%	9.7%	11.0%
Sandwiches	8.4%	8.9%	8.5%	9.5%	7.0%
Ice cream	8.9%	9.9%	8.5%	11.5%	13.9%
Meals at a restaurant along the trail	19.1%	13.8%	17.2%	17.5%	14.5%
Bike rental	NA	NA	NA	NA	0.2%
Film	2.7%	2.7%	1.2%	0.9%	NA
Fuel	NA	NA	NA	4.3%	NA
Other	NA	NA	NA	NA	2.0%
None of these	20.2%	18.6%	25.7%	20.9%	31.1%

69.9% 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
Average soft good purchase on most recent trail visit	\$6.47	\$8.33	\$13.97	\$12.86	\$13.28

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

Average spending has increased slightly from 2007 to 2012. 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 in Seven Valleys reduced the number of establishments where trail users could purchase a restaurant style meal. Hopefully someone will come along and re-establish this popular location.

The following chart takes the 2012 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
2012 Economic Impact Analysis

					Annual Users		
					250,000	300,000	350,000
Category	% Usage	Avg. \$	Average Life	# of Trips			
Hard Goods*	89.0%	\$356.59	6 years	6.1	\$2,167,794	\$2,601,353	\$3,034,912
Soft Goods	69.9%	\$13.28			\$2,320,680	\$2,784,816	\$3,248,952

$$\text{Hard Goods} = (\% \text{ Usage} \times (\text{Avg. } \$ / \text{Avg. Life}) \times (\# \text{ Users} / \text{Avg. Number of Trips})^*$$

$$(.890 \times (\$356.59 / 6)) \times (250,000 / 6.1) = \$2,167,794$$

$$\text{Soft Goods} = (\% \text{ Usage} \times \text{Annual Users} \times \text{Users Avg. } \$)$$

$$(.699 \times 250,000 \times 13.28) = \$2,320,680$$

*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 basis.

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

**Heritage Rail Trail County Park
2007 Economic Impact Analysis**

					Projected Annual Users		
					300,000	350,000	400,000
Category	% Usage	Avg. \$	Average Life	# of Trips			
Hard Goods*	89.6%	\$367.77	6 years	10.55	\$1,561,715	\$1,822,001	\$2,085,514
Soft Goods	79.1%	\$12.86			\$3,051,678	\$3,560,291	\$4,068,904

Hard Goods = (% Usage X (Avg. \$/Avg. Life)X (# Users/Avg. Number of Trips)*
 (.896 X (\$367.77/6)) X (300,000/10.55) = \$1,561,715

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**

					Projected Annual Users		
					200,000	250,000	300,000
Category	% Usage	Avg. \$	Average Life	# of 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

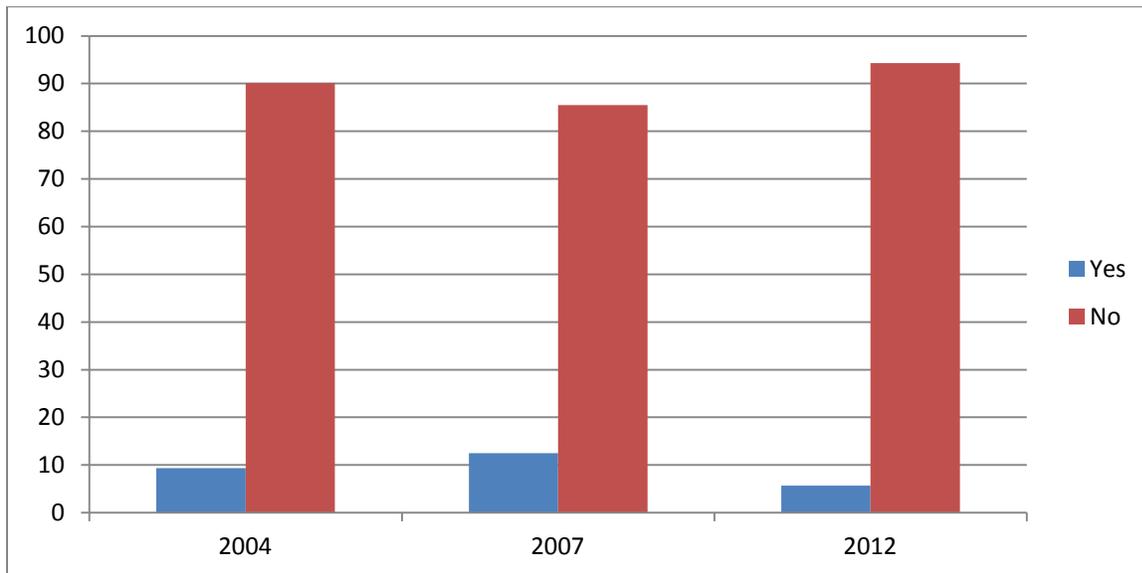
Heritage Rail Trail County Park 2001 Economic Impact Analysis

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

Question 17.

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.

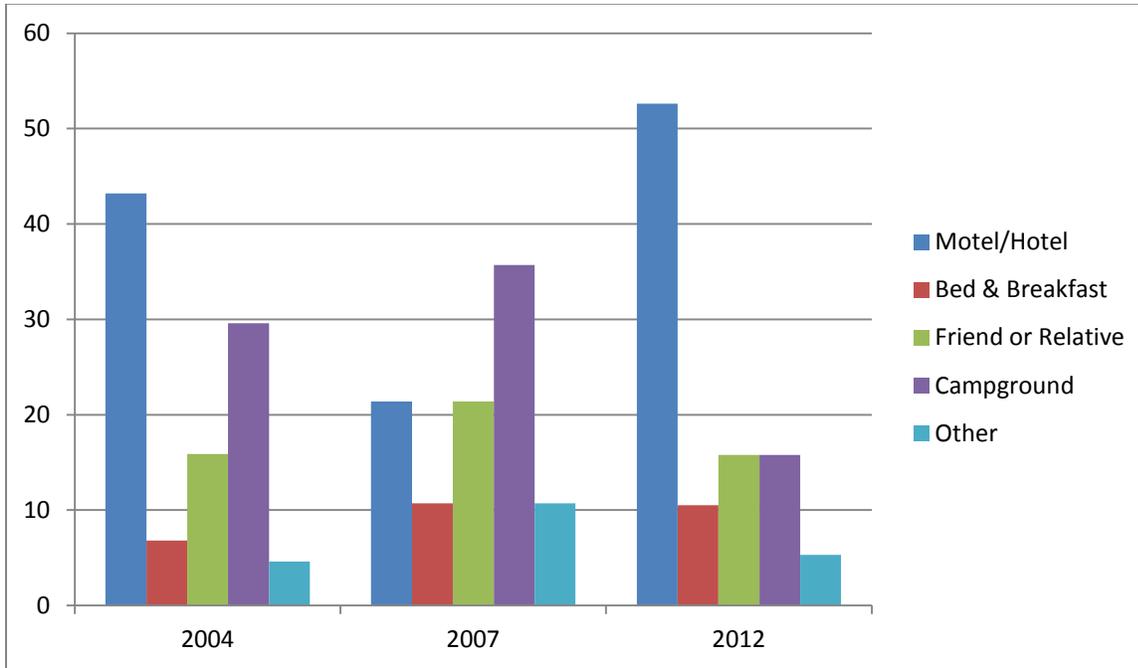
Did your visit to the Trail involve an overnight stay in one of the following types of accommodations?



	2004	2007	2012
Yes	9.9%	12.5%	5.7%
No	90.1%	87.5%	94.3%

Question 17a.

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



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

There was a significant shift in the type of accommodations that the survey respondents preferred between 2004/2007 and 2012. More than 50% in 2012 stayed at a motel or hotel.

Question 19.

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

The average expenditure per night was \$92.67 (15 respondents provide spending data). This is \$40 more than the 2007 average showing the shift from campgrounds to motels/hotels.

Trail Maintenance, Security and Cleanliness



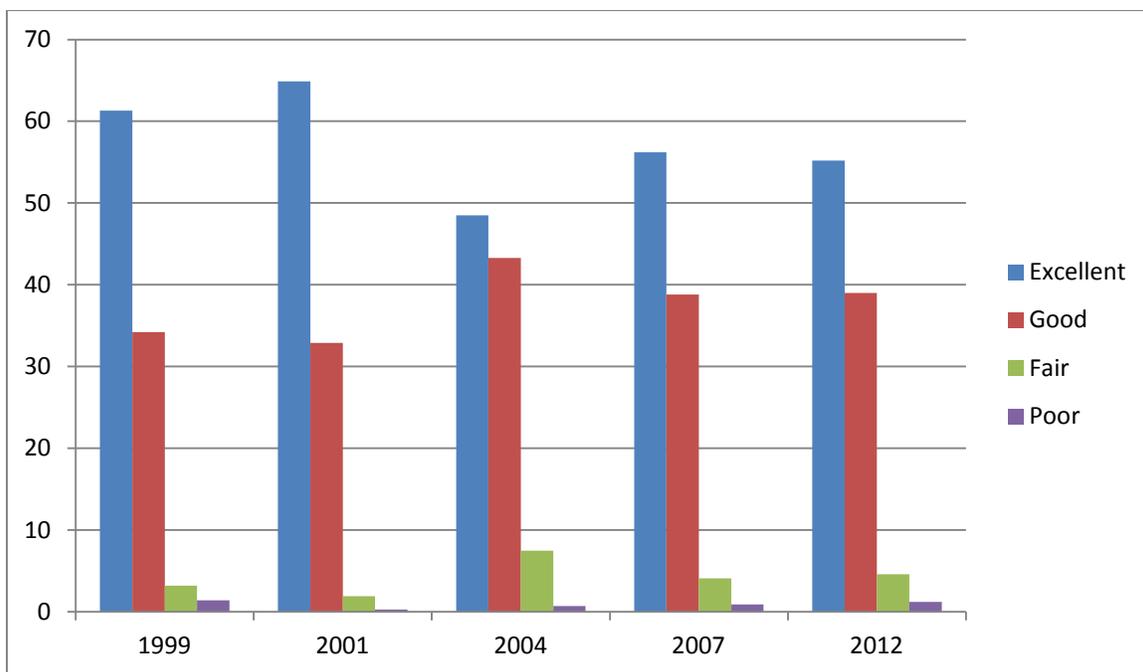
When the initial survey was conducted in 1999 it was in conjunction with the grand opening of the Heritage Rail Trail County Park. The data collected on this brand new county park established a benchmark for user perceptions regarding maintenance, safety and cleanliness.

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)

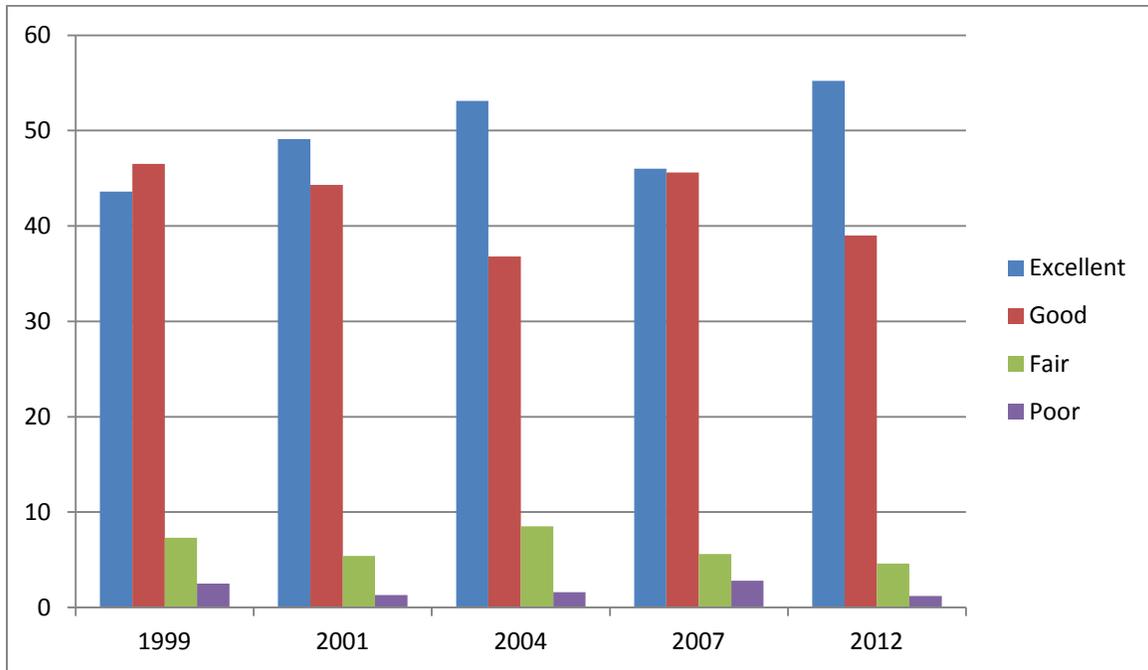


	1999	2001	2004	2007	2012
Excellent	61.3%	64.9%	48.5%	56.2%	53.2%
Good	34.2%	32.9%	43.3%	38.8%	41.4%
Fair	3.2%	1.9%	7.5%	4.1%	5.1%
Poor	1.4%	0.3%	0.7%	0.9%	0.3%

The maintenance of the Heritage Rail Trail has been rated excellent or good by more than 90% of the survey participants in each of the surveys, from the year the trail opened through its thirteenth 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)

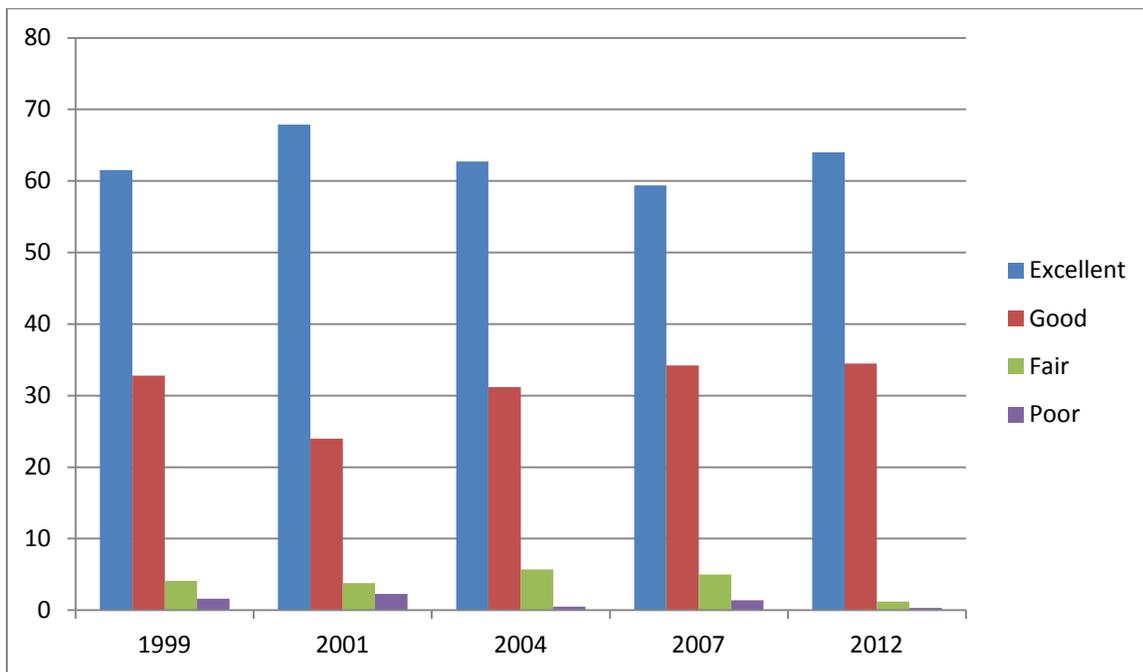


	1999	2001	2004	2007	2012
Excellent	43.6%	49.1%	53.1%	46.0%	55.2%
Good	46.5%	44.3%	36.8%	45.6%	39.0%
Fair	7.3%	5.4%	8.5%	5.6%	4.6%
Poor	2.5%	1.3%	1.6%	2.8%	1.2%

The Heritage Rail trail has had very few security issues to deal with. The presence of park rangers and trail ambassadors add to the user's sense of security. Also, a trail with a high usage rate throughout the week has a constant source of surveillance.

Question 22.

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



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

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.

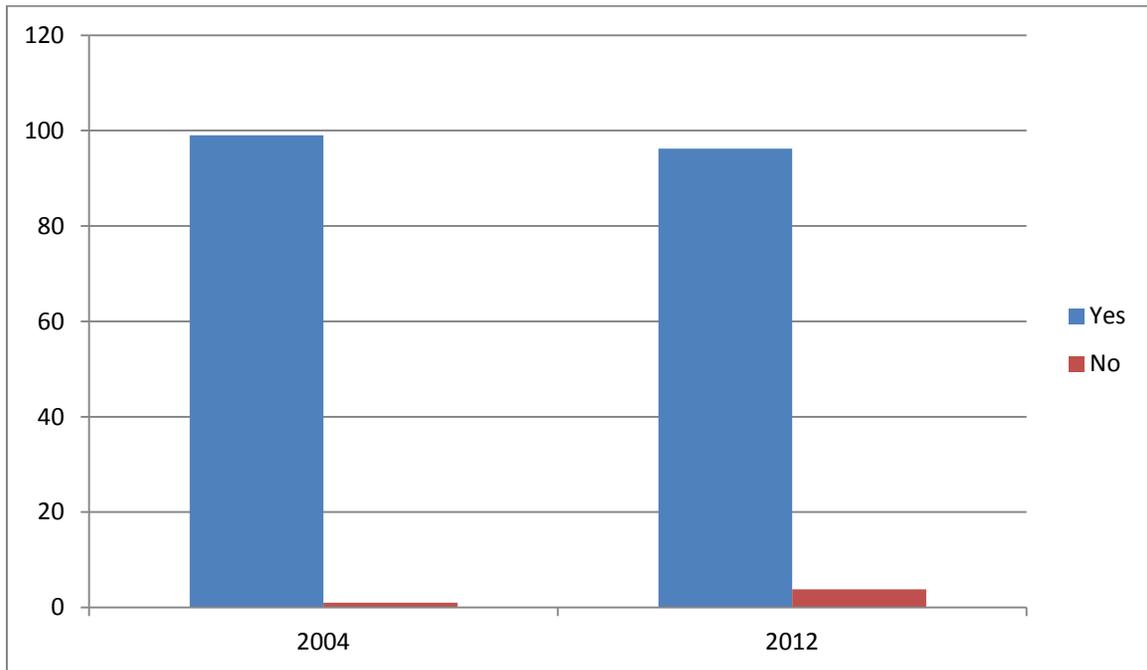
In your opinion, the trail surface is? (check one)

	2012
Excellent	37.6%
Good	53.3%
Fair	8.0%
Poor	1.2%

This is the first year that this question has been asked of the trail users. 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?



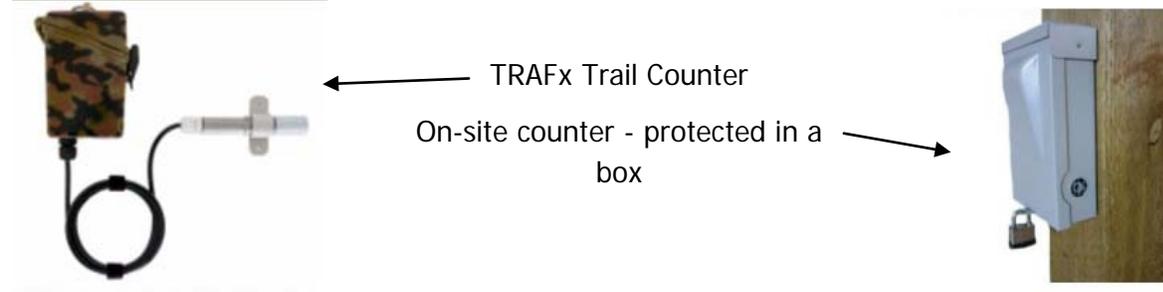
	2007	2012
Yes	99.0%	96.2%
No	1.0%	3.8%

Support for additional trails has declined slightly since 2007 but is within the range of being statistically insignificant.

Appendix A – Trail Counter Data



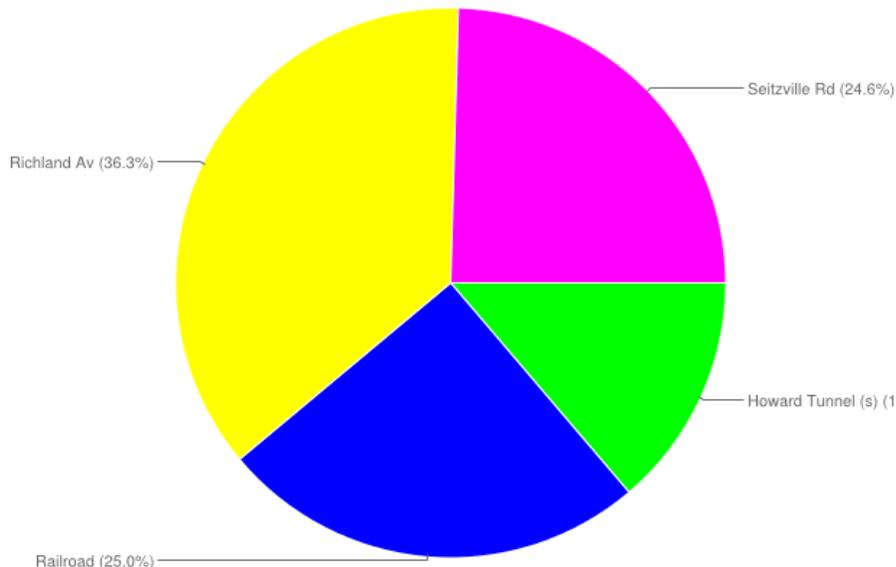
TRAFx Infrared Trail Counters were used on the Heritage Rail Trail. TRAFx Infrared Trail Counters are designed to count general traffic on trails and paths — hikers, joggers, horseback riders, cyclists, etc. It is a very compact, easy-to-hide counter. Using a small, high-quality infrared scope mounted on a tree and 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 Richland Avenue, Howard Tunnel, Seitzville Road and Railroad. The charts below show a sampling of the usage per counter location for 2012. 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.

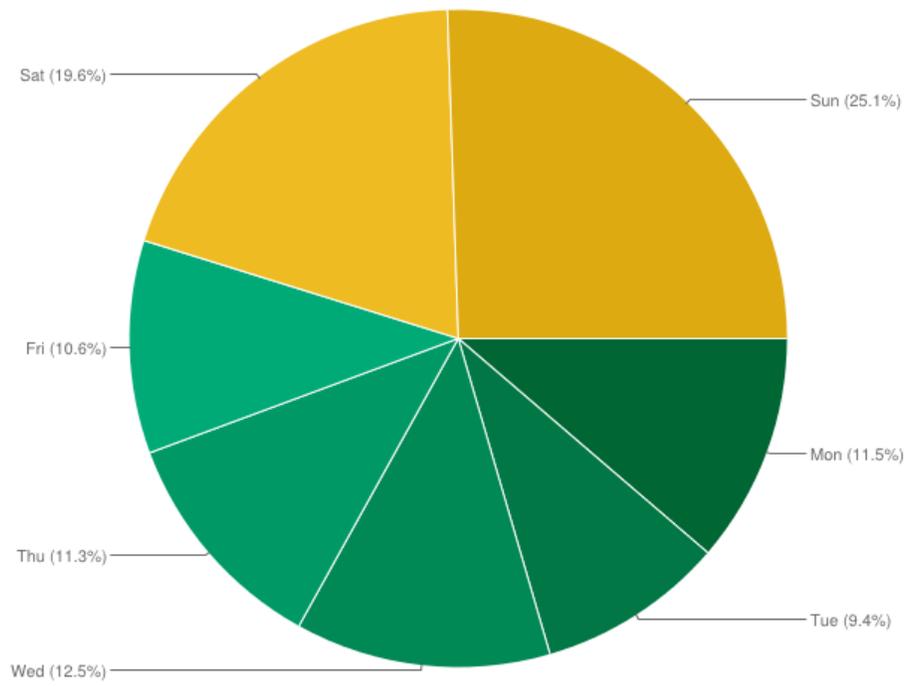
Compare Sites

Data from 2012-05-16 to 2012-12-11



Days of the week

Data from 2012-05-16 to 2012-12-11



Appendix B— 2012 Survey Form



2012 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 Once a week Twice a week More than twice a week Once a month A couple of times 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 is your primary activity on the trail? (circle all that apply)
Walking/ Hiking Biking Jogging/Running Horseback Riding XC skiing Geocaching
Nature Study 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
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 Facebook York Co. Parks Brochure
www.explorePAtrails.com www.Trailink.com www.yorkcountytrails.org www.yorkcountyparks.org
Other (specify) _____
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? \$_____

15. In conjunction with your most recent trip to the trail, did you purchase any of the following? (circle all that apply) Beverages Candy/Snack foods Sandwiches Ice cream Meals at a restaurant near the trail Bike rental Other (please specify) _____ None of these
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 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 over night 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 trails 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 Rudy Park to Crist Memorial Field
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. Rudy Park Crist Memorial Field Other (please specify the street) _____
27. Do you support the development of additional multi-use trails in York County (circle one) Yes No

Additional comments _____