

Trail User Survey Workbook

How to conduct a survey and win support for your trail

Sample Surveys and Methods

2005



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I. Overview

Trail User Surveys

The purpose of this manual is to help you implement a trail user survey and determine the economic impact that your trail has on your community. Let's begin by looking at the steps involved in a survey project.

- Establish the goals of the project - what do you want to learn?
- Determine who you want to interview
- Choose a data collection methodology
- Create your questionnaire
- Collect the data - ask the questions
- Analyze the data
- Produce a report

Establishing Goals

The first step in conducting a trail user survey is to determine precisely what information is to be gathered and how it is to be used. If you do not have clear goals for your project, the survey results will be unclear and their usefulness will be limited. Therefore, begin by determining who will be surveyed, what they will be asked, and how their responses will assist you in attaining the survey goals. Some typical goals include learning more about:

- Trail usage characteristics - what trail visitors do, when and why they do it
- Demographics of trail users or visitors - age, gender, residence, etc.
- Trail users' perceptions of the trail - maintenance, security, cleanliness
- Spending related to trail activities - bike or equipment purchase, food, water, etc.

Sample Selection

- **Who to Survey**

In most cases, you will be interested in gathering information from individuals who actually use your trail. After all, we are conducting a trail user survey. But, you may also be interested in gathering information from adjacent property owners, businesses that are adjacent to the trail or businesses that provide products and services for trail users (bike shops, B & B's, motels, restaurants). Who you want to gather information from is referred to as the **target group**.

- **How many to Survey**

You also need to determine how many people will be surveyed. This is called your **sample size**. The larger the sample, the more accurately the results will reflect the target group. A decision about your sample size should be based on such factors as: project timeline, budget and necessary degree of precision. Consider 300 completed surveys to be a minimum number for your sample size.

- **When to Survey**

Most trail user surveys are conducted between May and October; these are the months when most trails see their heaviest usage. However, if you are also interested in winter usage such as snowmobiles or cross-country skiing, you may want to collect data over a 12-month period. Your decision as to when to survey will depend upon the goals of the survey and the observed seasonal usage of the trail.

II. Methods of Collecting Data

Even before you begin developing your trail user survey form, it is important to decide how you are going to collect the data and how you are going to analyze it. The following describes both of these aspects of your trail user survey.

There are several ways that you can collect the information you desire from your trail users. Pay particular attention to which method will be manageable for you over a several month period and which method will not be burdensome to the trail users. Each of the methods described below has been successfully used by other trail groups. Each provides very similar results.

Methodology 1 - Self Selecting - Drop Box

This data collection methodology is the least expensive and easiest to implement. You will need two items that can be placed at trail access points or at trailside establishments.

One is a holder for survey forms. Brochure holders can be obtained at any office supply store. The preferred style holds an 8 1/2 x 11 inch survey form folded three times (like you would fold a letter). They usually have a hole in the top so that they can be attached to a wooden post with a screw. Most do not include a cover to protect the survey forms from rain, so try and place them under cover at trail information boards.



The second item is a trail survey collection box. This is a box for the deposit of completed surveys. They can be either purchased ready-made or constructed to your specifications. The lid should be secured in a way that prevents unauthorized access to the completed survey forms. The collection boxes should be placed close to the survey form holders. Trail users take one of the survey forms, complete the form, and place it in the survey collection box. Periodically during the course of the survey period, authorized personnel collect the completed survey forms and deliver them for data input.

Methodology 2 - Self Selecting - Mail Back

This data collection methodology is similar to the first method described but somewhat more expensive to implement. The primary difference is that instead of using trail survey collection boxes, completed surveys are mailed to a central location.

As with the first method, you will need some brochure holders to hold the survey forms at trail access points and trail related businesses. You will also need to obtain a reply mail permit from the local post office. You will have to pay for each survey form that is mailed back to you. The cost of the permit and the cost per returned survey vary with the volume of completed surveys you anticipate on an annual basis. Check with your local postmaster regarding current rates and the plan that best fits your anticipated volume.

The completed forms are received at a designated address, usually a post office box, and collected periodically during the survey period for data input.

Methodology 3 - Personal Intercepts

This data collection methodology provides the greatest degree of control but is the most expensive and difficult to implement.

This method involves “intercepting” trail users and asking them to complete a survey. Staff, college interns or volunteers are stationed at trail access points. As users exit the trail they are asked to participate in the survey. The survey form can be completed by the trail user or the individual who is administering the intercept (questions would be read to the trail user like an interview). Completed survey forms are collected at a central location for data input.

To be effective and obtain a cross section of trail users, intercepts must be conducted randomly across all daylight hours and every day of the week. Over the course of a survey period, this will entail hundreds of hours of effort. Those conducting the intercepts must be trained in advance on how to be effective in asking for trail user participation. If the survey is going to be conducted like an interview, additional training needs to be conducted on how to elicit responses so as not to bias the results.

Other Methodologies

The following methodologies require an existing database and professional assistance is advised. For those reasons, these are not recommended for trail user surveys.

- ◆ Direct Mail
- ◆ Web Site Based
- ◆ E-mail

III. Designing a Survey Form

Four sample survey forms are included in the Appendix of this manual and on the CD as Word© documents to permit editing of the survey questions to fit your specific needs. Each template has been specifically designed for a particular type of trail - metropolitan, suburban, rural non-motorized multi-use, and rural motorized multi-use. You will note that the questions vary slightly to accommodate these differences. The questions have been “field-tested” on other trail surveys and have proven to provide reliable and consistent responses.

The most important consideration when designing a survey is to select those questions that will best help you achieve the goals established for your project. Review your goals and stick to them.

Keep the number of questions in the survey to a minimum. Generally it is better to keep the survey form to a maximum size of one side of one page. For each question, ask yourself “What will I do with the information gathered in response to this question?” AND “Will this information help me to achieve the goals of the survey?” If you can’t give yourself a reasonable answer, leave the question out.

Because you will probably be working with hundreds of completed survey forms, make the questions “closed-ended”. That is, you provide the respondent with a number of pre-determined responses from which to choose. Open-ended questions, where the respondent can provide any answer that comes into their head, are generally too difficult to analyze.

If you wish to add additional questions to those provided in the template, keep the following in mind: (1) Place difficult or sensitive questions near the end of the survey. (2) Group questions together in a logical sequence.

On each of the sample survey forms, certain questions are considered essential in order to compare data collected in your survey with data collected by other trail organizations across Pennsylvania. For comparative capabilities, always include the following questions on your survey: 1,2,3,4,5,13,14,15,16,17,and 18.

Questions 22, 23, 24 are considered optional for a comparative analysis, but the information may be useful to you in managing your trail.

IV. Recording Your Data

Input

The methods for data input included here have been designed to make the recording of your survey data as easy as possible. The suggested methodology assumes a working knowledge of Microsoft Excel[®]. If you are not familiar with this software, we recommend you seek a skilled volunteer from a local business or college to assist you with the data input.

You will need a computer that can run Microsoft Excel, which is a basic spreadsheet program. **A blank Excel spreadsheet template for each of the pre-formatted survey forms has been provided on the CD.**

Each completed survey form is represented by a row in the spreadsheet. Each possible response to a question is represented by a column on the spreadsheet. A response to a question is represented by entering a “1” in the column that corresponds to the question response. The only exceptions to entering the numeral “1” are: (1) the ZIP code where the actual five digit number must be entered, (2) the number of nights stayed in accommodations, and (3) the dollar expenditure questions where the actual dollar amount reported must be entered. If the respondent failed to provide a response to a question, leave the column blank. An example is provided below.

TABLE I.

Question 6: Please identify your age group. (circle one)
 15 and under 16 to 25 26-35 36-45 46-55 56-65 66 or older

Question: Age	15 and <	16 - 25	26 - 35	36 - 45	46 - 55	56 - 65	>66
Survey # 1						1	
2							1
3							1
4							
5					1		
6							
7					1		
8						1	
9						1	
10						1	

Survey #4 had no response to this question therefore the row is left blank.

When entering the data, there are two points that must be kept in mind. First, you must enter exactly what the respondent provided. If the question asked the respondent to “circle one” and they circled three responses you must place a “1” in each column. Second, be aware of the possibility of “outliers”. These are surveys or survey responses that are abnormal when compared to the type of response that would normally be anticipated, e.g., a four digit Zip Code. Such responses are more apt to occur when a “self-service” methodology was used to conduct the survey. In some instances surveys are completed in a malicious manner and contain obvious fabrications. For example,

someone purchased ice cream and recorded a cost of \$1,000. It is best to set surveys with questionable responses aside for review by the project manager.

When all of the completed surveys have been entered into your Excel spreadsheet, the next task is to add up the responses and generate the percentages for each response. Again, the sum function and percentage calculations have been provided on the Excel spreadsheets that correspond with the pre-designed survey forms. The calculations can be found in rows 408, 409 and 411 of the Excel spreadsheets. Below is an example of what the last rows of the spreadsheet look like.

TABLE II.

Question: Age		15 and <	16 - 25	26 - 35	36 - 45	46 - 55	56 - 65	>66
Row 401	Survey # 375				1			
402	376						1	
403	377			1				
404	378					1		
405	379						1	
406	380					1		
407								
408	Question Total	387						
409	Respondent Totals	18	16	56	73	108	73	43
410								
411	Respondent Percent	4.65%	4.13%	14.47%	18.86%	27.91%	18.86%	11.11%

Calculating the Percentages: (Note: The following calculations will be performed automatically on the included spreadsheet)

The columns are first summed vertically. The results are shown in the row labeled Respondent Totals. Each figure is referred to as the dividend. To arrive at the divisor, all of the respondent totals for each answer are then added together. This provides the total number of responses for a particular question.

In the above example, the divisor is 387. (18+16+56+73+108+73+43=387) To arrive at the percentage, the dividend located in each column is divided by the divisor, or the total for the question, and then multiplied by 100. Continuing with our example to arrive at the percentage of survey respondents that are between the ages of 36 and 45, the calculation looks like this: $73 \div 387 = .1886$, $.1886 \times 100 = 18.86\%$

Note: In this example, the total number of completed surveys was 380, but there were actually 387 responses to Question 6. In some cases if the survey was completed by a couple or a family, multiple responses were circled. Remember you must record what the respondent placed on the survey form unless you suspect an “outlier.”

When you have completed entering the data from all of the completed survey forms into the Microsoft Excel spreadsheet, **MAKE A BACKUP COPY OF YOUR RESPONDENT DATABASE!**

V. Reporting and Analysis

Reporting

To complete your project, a report should be written that presents the results of the research. **(Sample reports from both a Trail User Survey and a Trail Event Survey have been included on the attached CD).** At a minimum, your report should include: 1) An executive summary of a page or two in length and 2) Tables or graphs containing the responses to each individual question.

When you have completed your report, please send a copy to the following office at DCNR so that your data can be compared and added to other trail data from around the state:

Department of Conservation and Natural Resources
Rachel Carson State Office Building, P. O. Box 8767
Harrisburg, PA 17105-8767

Below is an example of how the data can be presented in a report.

Question 6.

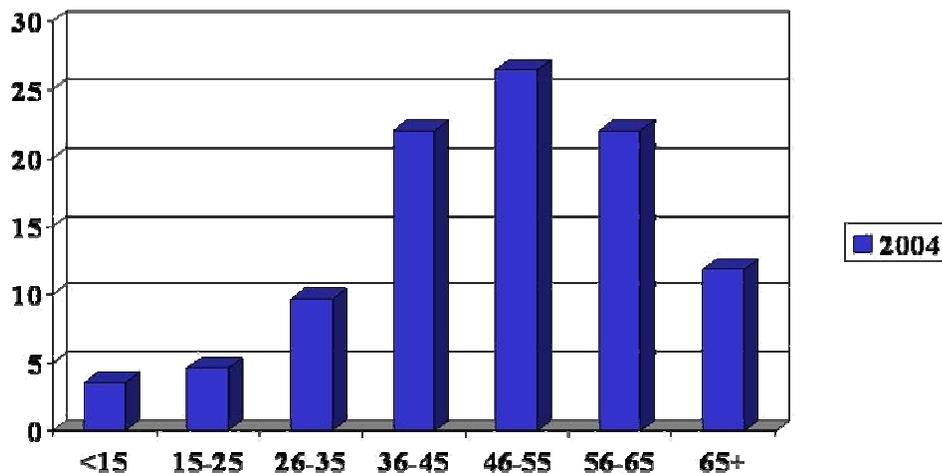
Please identify your age group. (Check one)

3.56%	under 15
4.57%	16 to 25
9.66%	26 - 35
21.98%	36 - 45
26.43%	46-55
21.98%	56-65
11.82%	66 or older

Another excellent way to present the findings is to prepare a series of graphs and charts that provide a visual representation of the results of the study. Below is a graph that represents the age data that was presented above.

TABLE III.

Age Distribution



VI. Economic Impact Analysis

An important aspect of trails is the financial impact they have on the communities they pass through. The economic impact of a trail is an important tool in helping to establish and maintain support for your trail . Using the statistics gathered as a result of your survey project can also strengthen applications for grant funding. Several important components to economic impact analyses include: (1) the amount of money users spend, (2) the number of annual trail visitations and (3) the costs associated with the trail.

If possible, costs of a trail, such as costs of initial acquisition, construction, and ongoing maintenance, should be figured into any economic impact analysis..

Trail User Counts

To be most effective, the economic impact should be presented as spending by all trail users on all trail visits over the course of a year (annual expenditures). In order to determine this, a user count, or estimate of total trail users and total trail user visits, must be developed.

There are a number of methods that can be used to develop trail user estimates. The least expensive, but most time consuming, method is to have volunteers conduct trail user counts at trail access points. Another method is to utilize volunteers to count trail users as they pass by a particular location. To eliminate the use of volunteer counters, some organizations have purchased or borrowed infrared counters that are placed along the trail over extended periods of time.

Whichever method is implemented, it is strongly advised that a trail user count be conducted in conjunction with the user survey. It is entirely possible to perform and make use of a Trail User Survey without performing a user count; however, you will not be able to project any of your findings to determine the overall economic impact. For references on performing Trail User Counts, please see the Appendix.

Trail User Spending

Three categories of spending accurately reflect spending relevant to both the trail and the user:

- **Hard Goods:** Items such as bicycles, ATV's (if permitted on your trail), snowmobiles (if permitted on your trail), auto accessories, supplies and clothing.
- **Soft Goods:** Consumables such as water, ice cream, sandwiches, snacks and candy.
- **Overnight Accommodations:** A trail activity related to a stay in a hotel, motel, B & B or campground

The types of goods purchased and the amount spent are captured on the survey form.

To calculate the average expenditure, sum all of the expenditures provided by the survey respondents and divide this total by the number of respondents that actually provided a dollar figure response

For **hard good** purchases, the survey question should request information on purchases made over the past twelve months. In the case of **soft good** purchases, the survey

question should request expenditures per person on the most recent trail visit. Whether overnight accommodations were used on the most recent trail visit and the associated expenditures should be requested on the survey form. is also asked

Assuming that the total annual user visits for your trail has been determined, the average **soft good** expenditure can then be multiplied by the number of user visits to determine the economic impact of this category of spending.

Example:

To determine an annual hard good expenditure, your analysis should be based on two determining factors: (1) average life-expectancy and (2) average depreciation. 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 determining the annual economic impact, select a number of years to represent the average life of the hard good purchases. In several recent studies where bicyclists represented the majority of trail users, an average life-expectancy of 6 years was utilized

To arrive at a hard goods expenditure figure that is on an annual user basis, the hard goods spending needs to be broken down to a per trip figure. This involves calculating the average spending on a particular hard good item based upon a “per use” depreciation amount.

Example:

(Note: The impact of hard good purchases must be analyzed in relation to where users reside. For example, if the majority of users are local, then hard good purchases can be interpreted as having a local impact. On the other hand if majority of users are not local, the area of impact should be stated in the final analysis.)

The economic impact can be presented in the form of a chart with a range of annual user visits. In the following example a user count of 200,000 was established via an actual count and progressive numbers were then added to demonstrate growth potential.

Table IV.

2004 Economic Impact Analysis

					Annual User Visits 200,000	Projected 250,000	Projected 300,000
Category	% Usage	Avg. \$	Avg. Life	# of trips			
Hard Goods*	85.77%	\$347	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

Hard Goods = % Usage X Avg. \$ ÷ Avg. Life X # User Trips ÷ Avg. Number of Trips
 The % Usage is the % of the survey respondents that indicated they purchased one or more items. In order to determine the % Usage, subtract the percentage in the “Nothing” column on the worksheet from 100% (100% - 14.23% = 85.77%).

In the above example, the calculation would look like this:
 $.8577 \times \$347.11 \div 6 \times (300,000 \div 7.97) = \$1,867,731$

A spreadsheet for calculating the average number of trips per year is contained on the CD. Simply enter the percentages from Question 2, and the spreadsheet will automatically calculate the average trips per year.

Soft Goods = % Usage X Users Average \$ X Annual Users
 The % Usage is the % of the survey respondents that indicated they purchased one or more items. In order to determine the % Usage, subtract the percentage in the "None of these" column on your spreadsheet from 100% (in the above example, 100% - 25.69% = 74.31%)

In the above example, the calculation would look like this:

$$.7431 \times \$13.97 \times 300,000 = \$3,114,332$$

Expenditure on overnight accommodations can be calculated by the following product: Average spending X the percentage of the respondents that indicated they stayed overnight X the average expenditure X the average number of nights. This result would then be multiplied by the number of unique trail users to arrive at total annual expenditure for overnight accommodations related to trail use.

Table V.

2004 Expenditures for Overnight Accommodations

				Unique Trail Users 25,094	Projected 31,367	Projected 37,641
Category	% Usage	Avg. \$	# Nights			
Overnight Accommodations	10.00%	\$55.00	1.2	\$165,620	\$207,022	\$248,252

Overnight
 Accommodations = % Usage X Average \$ X # of Nights X # of Unique Trail Visitors

In the above example the calculation would look like this:

$$(.1000 \times \$55.00 \times 1.2 \times 25,094 = \$165,620)$$

VII. Survey Templates

User Survey Template – Metropolitan Trail

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

1: What is your zip code? _____

2: How often, on average, do you use the trail? (circle one response)

Daily Between 3 and 5 times a week 1 or 2 times a week Once a week A couple of times a month
Once a month A few times a year First time

3: Please identify your age group. (circle one response)

15 and under 16 to 25 26-35 36-45 46-55 56-65 66 or older

4: Were any children under the age of 15 with you on your trail experience today? Yes No

5: What is your gender? (circle your response) Male Female

6: What is your primary activity on the trail? (circle all that apply)

Walking/Hiking Biking Jogging/Running Rollerblading Walking pet XC skiing/Snowshoeing Other _____

7: Generally, when do you use the trail? (circle one response) Weekdays Weekends Both

8: 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

9: Would you consider your use of the trail to be for... (circle one response)

Recreation Health and Exercise Commuting Fitness Training (marathon, triathlon) Other (specify) _____

10: If you use the trail to commute, what is the total round trip mileage? _____

11: How did you find out about the trail? (circle all that apply)

Word of mouth Roadside signage Driving past Newspaper Parks Department Bike shop
Convention and Visitors Bureau Information from Rails-to-Trails Conservancy Internet web site Other _____

12: Has your use of the trail influenced your purchase of: (circle all that apply)

Bike Bike supplies Auto accessories Rollerblades Footwear Clothing Nothing

13: Approximately how much did you spend on the items above in the past year? \$ _____

14: 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 along the trail Other _____ None of these

15: Approximately how much did you spend, per person, on the items above on your most recent visit? \$ _____

16: 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) _____

17: How many nights did you stay in conjunction with your visit to this trail? _____

18: Approximately how much did you spend on over night accommodations per night? \$ _____

19: In your opinion, the maintenance of the trail is (circle one) Excellent Good Fair Poor

20: In your opinion, the safety and security along the trail is (circle one) Excellent Good Fair Poor

21: In your opinion, the cleanliness of the trail is (circle one) Excellent Good Fair Poor

22: Would you be willing to pay an annual usage fee to help maintain the trail? (circle one response) Yes No

23: What portion of the trail do you use most often? (circle all that apply)

Divide your trail into segments, generally from one trail access point to the next.

24: Which trail access point do you generally use when you visit the trail? (circle all that apply)

List all trail access points.

Additional comments _____

User Survey Template – Suburban Trail

In order to provide you with a high quality recreational 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 Between 3 and 5 times a week 1 or 2 times a week Once a week A couple of times a month
Once a month A few times a year First time

3: Please identify your age group. (circle one response)

15 and under 16 to 25 26-35 36-45 46-55 56-65 66 or older

4: Were any children under the age of 15 with you on your trail experience today? Yes No

5: What is your gender? (circle your response) Male Female

6: What is your primary activity on the trail? (circle all that apply)

Walking/Hiking Biking Jogging/Running Horseback riding Rollerblading Walking pet XC skiing/Snowshoeing
Other activity (specify) _____

7: Generally, when do you use the trail? (circle one response) Weekdays Weekends Both

8: 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

9: Would you consider your use of the trail to be for... (circle one response)

Recreation Health and Exercise Commuting Fitness Training (marathon, triathlon) Other (specify) _____

10: If you use the trail to commute, what is the total round trip mileage? _____

11: How did you find out about the trail? (circle all that apply)

Word of mouth Roadside signage Driving past Newspaper Parks Department Bike shop
Convention and Visitors Bureau Information from Rails-to-Trails Conservancy Internet web site Other _____

12: Has your use of the trail influenced your purchase of: (circle all that apply)

Bike Bike supplies Auto accessories Rollerblades Footwear Clothing Nothing

13: Approximately how much did you spend on the items above in the past year? \$ _____

14: 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 along the trail Other _____ None of these

15: Approximately how much did you spend, per person, on the items above on your most recent visit? \$ _____

16: 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) _____

17: How many nights did you stay in conjunction with your visit to this trail? _____

18: Approximately how much did you spend on over night accommodations per night? \$ _____

19: In your opinion, the maintenance of the trail is (circle one) Excellent Good Fair Poor

20: In your opinion, the safety and security along the trail is (circle one) Excellent Good Fair Poor

21: In your opinion, the cleanliness of the trail is (circle one) Excellent Good Fair Poor

22: Would you be willing to pay an annual usage fee to help maintain the trail? (circle one response) Yes No

23: What portion of the trail do you use most often? (circle all that apply)

Divide your trail into segments, generally from one trail access point to the next.

24: Which trail access point do you generally use when you visit the trail? (circle all that apply)

List all trail access points.

Additional comments _____

User Survey Template – Rural Trail – Non-Motorized Multi-Use

In order to provide you with a high quality recreational 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 Between 3 and 5 times a week 1 or 2 times a week Once a week A couple of times a month
Once a month A few times a year First time

3: Please identify your age group. (circle one response)

15 and under 16 to 25 26-35 36-45 46-55 56-65 66 or older

4: Were any children under the age of 15 with you on your trail experience today? Yes No

5: What is your gender? (circle your response) Male Female

6: What is your primary activity on the trail? (circle all that apply)

Walking/Hiking Biking Jogging/Running Horseback Riding XC skiing/Snowshoeing Other activity (specify) _____

7: Generally, when do you use the trail? (circle one response) Weekdays Weekends Both

8: 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

9: Would you consider your use of the trail to be for... (circle one response)

Recreation Health and Exercise Commuting Fitness Training (marathon, triathlon) Other (specify) _

10: During your trail visit did you (circle all that apply) Fish Canoe Kayak Tube Watch birds Watch wildlife Study flowers

11: How did you find out about the trail? (circle all that apply)

Word of mouth Roadside signage Driving past Newspaper Parks Department Bike shop
Convention and Visitors Bureau Information from Rails-to-Trails Conservancy Internet web site Other _____

12: Has your use of the trail influenced your purchase of: (circle all that apply)

Bike Bike supplies Auto accessories Footwear Clothing Nothing

13: Approximately how much did you spend on the items above in the past year? \$ _____

14: 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 along the trail
Horse rental Other _____ None of these

15: Approximately how much did you spend, per person, on the items above on your most recent visit? \$ _____

16: 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) _____

17: How many nights did you stay in conjunction with your visit to this trail? _____

18: Approximately how much did you spend on over night accommodations per night? \$ _____

19: In your opinion, the maintenance of the trail is (circle one) Excellent Good Fair Poor

20: In your opinion, the safety and security along the trail is (circle one) Excellent Good Fair Poor

21: In your opinion, the cleanliness of the trail is (circle one) Excellent Good Fair Poor

22: Would you be willing to pay an annual usage fee to help maintain the trail? (circle one response) Yes No

23: What portion of the trail do you use most often? (circle all that apply)

Divide your trail into segments, generally from one trail access point to the next.

24: Which trail access point do you generally use when you visit the trail? (circle all that apply) List all trail access points.

Additional comments _____

User Survey Template – Rural Trail – Motorized Multi-Use

In order to provide you with a high quality recreational 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 Between 3 and 5 times a week 1 or 2 times a week
Once a week A couple of times a month Once a month A few times a year First time
- 3: Please identify your age group. (circle one response)
15 and under 16 to 25 26-35 36-45 46-55 56-65 66 or older
- 4: Were any children under the age of 15 with you on your trail experience today? Yes No
- 5: What is your gender? (circle your response) Male Female
- 6: What is your primary activity on the trail? (circle all that apply) Walking/ Hiking Biking Jogging/Running
Horseback Riding ATV XC skiing/Snowshoeing Snowmobile Other activity (specify) _____
- 7: Generally, when do you use the trail? (circle one response) Weekdays Weekends Both
- 8: 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
- 9: Would you consider your use of the trail to be for... (circle one response)
Recreation Health and Exercise Commuting Fitness Training (marathon, triathlon) Other (specify) _____
- 10: During your trail visit did you (circle all that apply) Fish Canoe Kayak Tube Watch birds Watch wildlife Study flowers
- 11: How did you find out about the trail? (circle all that apply)
Word of mouth Roadside signage Driving past Newspaper Parks Department Bike shop
Convention and Visitors Bureau Information from Rails-to-Trails Conservancy Internet web site Other _____
- 12: Has your use of the trail influenced your purchase of: (circle all that apply)
Bike Bike supplies Auto accessories Footwear ATV Snowmobile Clothing Nothing
- 13: Approximately how much did you spend on the items above in the past year? \$ _____
- 14: 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 along the trail
ATV rental Snowmobile rental Horse rental Other _____ None of these
- 15: Approximately how much did you spend, per person, on the items above on your most recent visit? \$ _____
- 16: 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) _____
- 17: How many nights did you stay in conjunction with your visit to this trail? _____
- 18: Approximately how much did you spend on over night accommodations per night? \$ _____
- 19: In your opinion, the maintenance of the trail is (circle one) Excellent Good Fair Poor
- 20: In your opinion, the safety and security along the trail is (circle one) Excellent Good Fair Poor
- 21: In your opinion, the cleanliness of the Trail is (circle one) Excellent Good Fair Poor
- 22: Would you be willing to pay an annual usage fee to help maintain the trail? (circle one response) Yes No
- 23: What portion of the trail do you use most often? (circle all that apply)
Divide your trail into segments, generally from one trail access point to the next.
- 24: Which trail access point do you generally use when you visit the trail? (circle all that apply) List all trail access points.
Additional comments _____

Appendix

Trail User Counts - References

Title

National Bicycle and Pedestrian Document Project
<http://www.altaplanning.com/>

Indiana Trail Study - Appendix B, Methodology
<http://www.in.gov/dot/projects/trails/m-AppendixB.pdf>

Allegheny Trail Alliance - Introduction, Methodology
<http://www.ucsur.pitt.edu/EDS/Chapter%201.pdf>

Using Pedestrian Count Models to Estimate Urban Trail Use
<http://www.uwex.edu/ces/cced/jrap/Lindsey1.pdf>

Handbook for Bicyclists And Pedestrian Counts
http://www.bayareatrafficsignals.org/downloads/ped&bike/Handbook_Summary.pdf

Guidebook on Methods to Estimate Non-Motorized Travel: Overview of Methods
Publication No. FHWA-RD-98-165
<http://www.fhwa.dot.gov/tfhrc/safety/pubs/vol1/title.htm>

October Use Patterns on Lansing's Riverfront Trail
<http://www.msu.edu/course/prr/475/djslect/Trrpt96.doc>

Case Study #1 York County Heritage Rail Trail

The York County Heritage Rail Trail, a 21-mile, non-motorized, multi-use trail, was developed in phases between 1990 and 1999 by the York County Rail Trail Authority. When completed and officially opened in August 1999, the York County Department of Parks and Recreation assumed responsibility for the trail's management and operations. Just prior to the opening of the final phase of the trail, the Authority and the Department of Parks developed a Trail User Study. The study was designed to collect information about trail users and their trail-related spending. From this survey came the "Heritage Rail Trail County Park 1999 User Survey and Economic Impact Analysis".* Follow-up studies have been conducted in 2001 and 2004.

These surveys provided information on user characteristics; which sections of the trail and trailheads were used most often; spending on trail-associated equipment; spending on beverages and snacks during trail use; perceptions of trail maintenance, cleanliness and security.

One key finding from the studies is the fact that over one-third of the Heritage Rail Trail users come from outside York County, making it a significant tourists attraction. Over the course of the three studies, the percentage of users that primarily bike has been declining from 79.6% in 1999 to 71.4% in 2004. More than 50% of trail users are on the trail from 2 hours or more on each visit. In 2004 the majority of the survey participants (55.8%) stated that their primary use of the trail was for health, exercise and fitness. Trail user spending on beverages and snacks has increased from an average of \$6.47 in 1999 to \$13.97 in 2004. User perceptions of the safety and security on the trail were higher in 2004 than in 1999.

Over the three studies, a total of 1,245 survey forms have been completed and analyzed. As one of the few trail user studies that is tracking usage characteristics and perceptions over time, these studies have proven to be a valuable management tool for the York County Department of Parks and Recreation.

According to Tom Brandt, Executive Director of York County Parks, the information from the survey reports has been used in "budgeting, board presentations, addressing media inquiries, internal publications, newsletters, annual reports, grant applications and park master plan..

Gwen Loose, Project Coordinator for the York County Rail Trail Authority, states that the Authority also uses the information contained in the user study reports to "win support for the development of additional trails in York County; provide assistance to trail organizations in other Pennsylvania counties; support grant applications to both local, state and federal funders; develop presentations to community organizations; and win national recognition for the York County Heritage Rail Trail".

*A copy of the "Heritage Rail Trail County Park 1999 User Survey and Economic Impact Analysis" is included on the attached disc.

Case Study #2 Pennsylvania Greenway Sojourn - Participant Survey

2004 marked the third year that the Northeast Regional Office of the Rails-to-Trails Conservancy hosted a Pennsylvania Greenway Sojourn, a 6-day bicycle tour in Pennsylvania riding 70% on trails. The purpose of this annual event is to promote the use and development of regional rail-trail systems. The route of the 2004 Sojourn covered 200 miles in the northwestern corner of the state. Sojourners camp in or near town centers. The majority of meals are provided with several meals being "on your own".

In conjunction with the 2004 Sojourn, 57.7% of the participants completed a brief survey at the end of their trip. Both demographic and economic questions were asked. The findings show that the participants are a highly educated and affluent group. Two thirds of the survey respondents purchased items such as bicycles, bicycle supplies, auto accessories, clothing and camping supplies prior to the trip with an estimated total expenditure of over \$69,000. Data related to purchases made during the event showed an estimated \$38,000 was spent by participants during the event on additional meals, snacks and other consumables (1st choice was not surprisingly ice cream!). Another \$10,000 was spent on overnight accommodations either before or after the Sojourn. The survey findings demonstrated that every community the Sojourn passed through realized an economic benefit from spending on goods and services. In total the 2004 Greenway Sojourn contributed over \$159,000 to the economy of northwestern Pennsylvania..

A one-page "Executive Summary" of the 2004 Sojourn Participant Survey provides an overview of the event, summary of the characteristics of the participants, and the major findings as stated above. The full-bound report includes a detailed summary of the responses to each question along with graphic charts illustrating the data.*

Pat Tomes, Program Coordinator for the Greenway Sojourn stated, "I find the report is invaluable when the Greenway Sojourn is entering new territory. One look at the Participant Survey and most community leaders will do everything they can to support the event".

Tim Poole, Sojourn Route Coordinator added, "In one specific case, the owner of a campground adjacent to the Armstrong Trail was a borderline opponent. After discussions, including the economic information, the proverbial light bulb went on, and the owner realized there was money to be made from the trail. Most towns were supportive of the Sojourn last year. But the red carpet was truly rolled out this year, as communities took an active role in planning our route, accommodations, meals, and other amenities. And these efforts were made by Chambers of Commerce, not primarily by trail organizations. This was clearly a result of the survey, supported by their own first-hand experiences from last year. By answering the "what's in it for me" question, the survey has also made it much easier to get the assistance required when extending the Sojourn to new communities and trails. Money talks, and the survey data makes the case that the Sojourn and the trail networks it promotes mean money for trailside communities and businesses".

*A copy of the 2004 Greenway Sojourn Participant Survey is included on the attached CD.

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



June 2002

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

June 2002

Prepared for:
York County Department of Parks and Recreation
York County Planning Commission
York County Rail Trail Authority

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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.

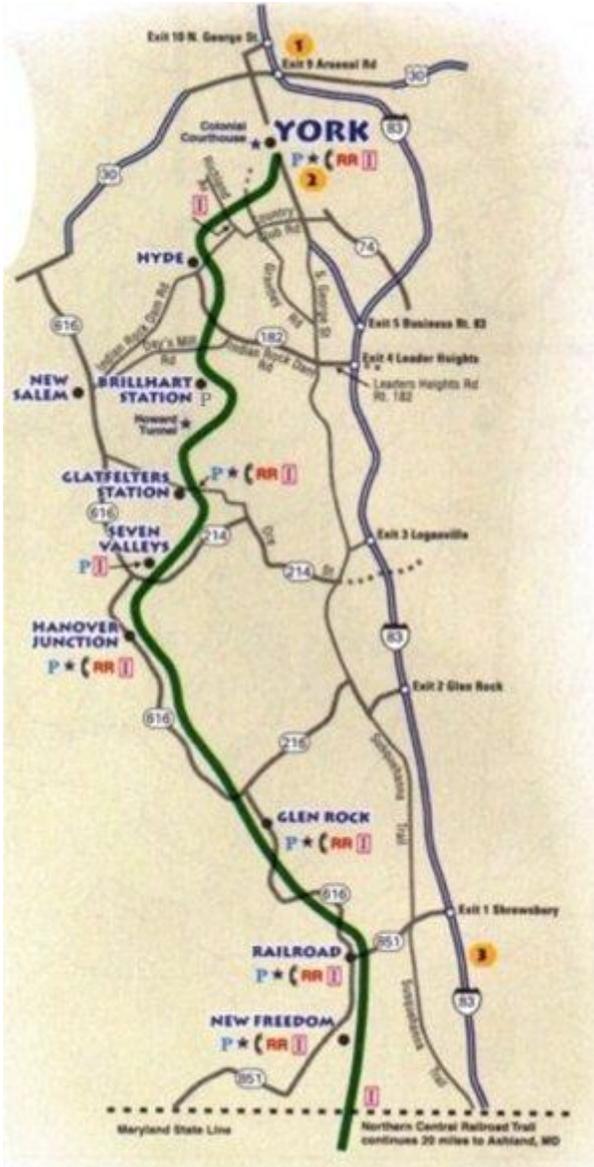
Trail Distances from the Maryland Line

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.

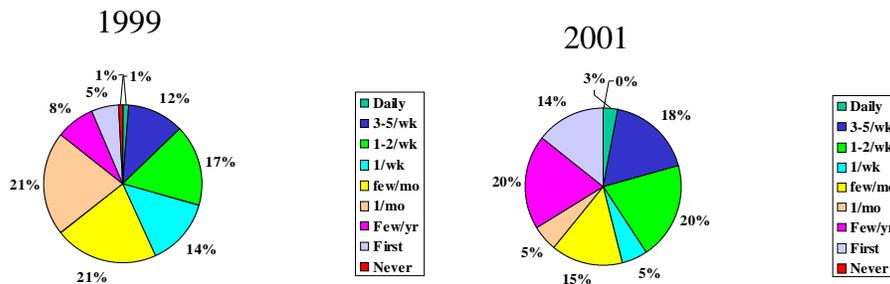
Question 2.

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.

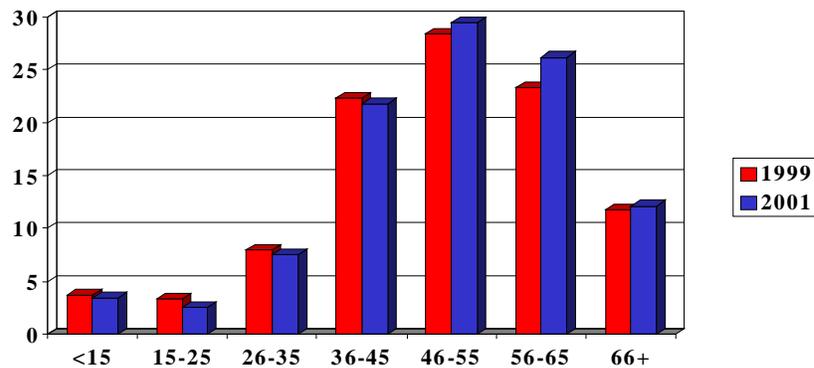
Question 4.

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.



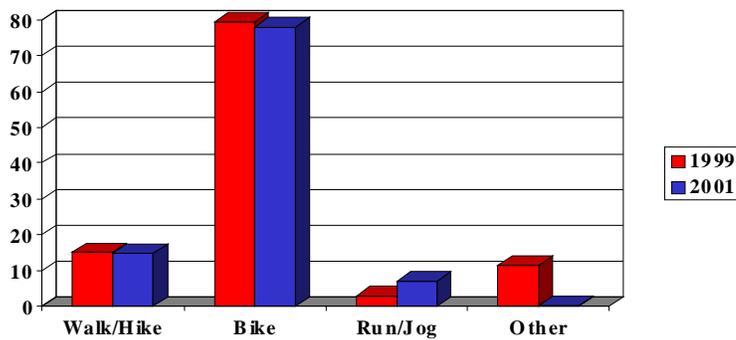
Question 6.

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?



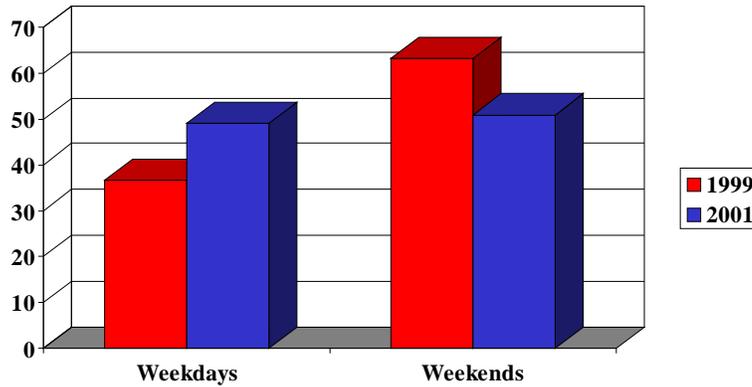
Questions 7.

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?



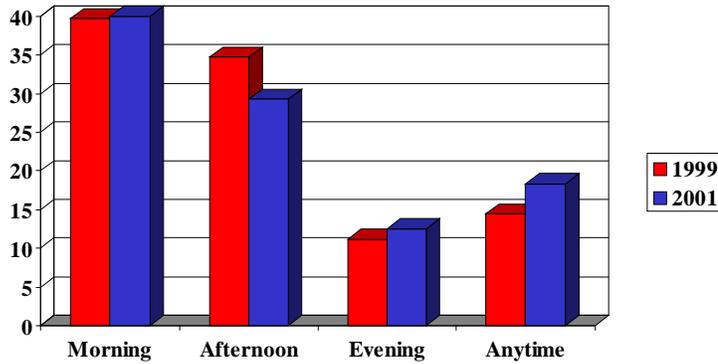
Question 8.

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?



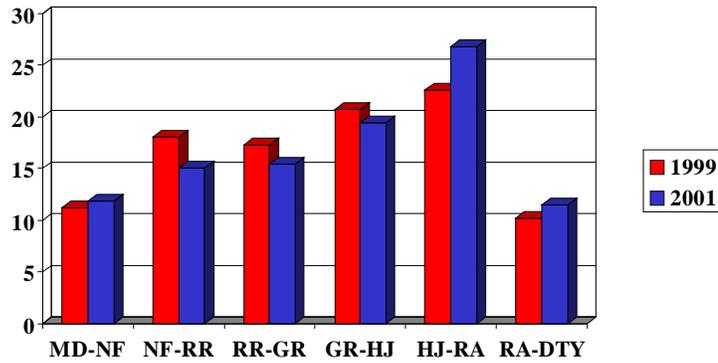
Question 9.

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

<u>1999</u>		<u>2001</u>
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

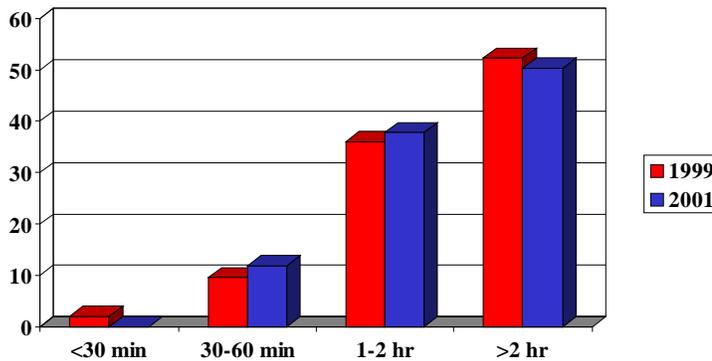
Question 10.

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	34,580
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. \$	Average Life	# of Trips				
Hard Goods*	72.2%	\$367.12	4 years	6.6	\$1,004,018	\$2,008,035	\$2,510,044	\$3,012,054
Soft Goods	65.6%	\$8.33			\$546,448	\$1,092,896	\$1,366,120	\$1,639,344

Hard Goods = (% Usage X (Avg. \$/Avg. Life)X # Users/Avg. Number of Trips)*

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

* 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. For the purpose of this analysis it is assumed an average life of 4 years. To get a figure that is usable on an annual user basis, the hard goods needs to be broken down to a per trip figure. What this amounts to is working the average spending on a “hard good” down to a per use depreciation amount.

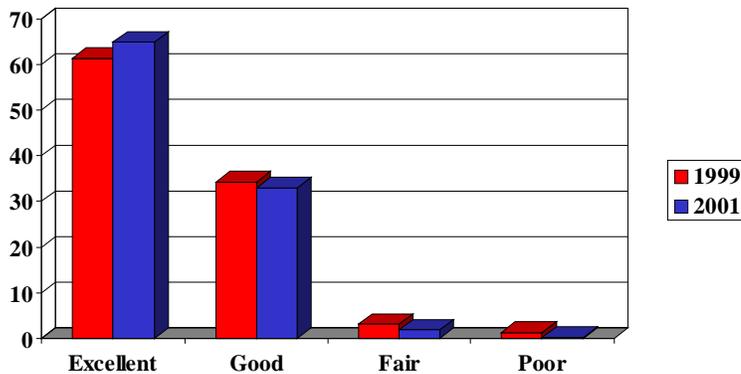
TRAIL MAINTENANCE, SECURITY AND CLEANLINESS

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, from 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...



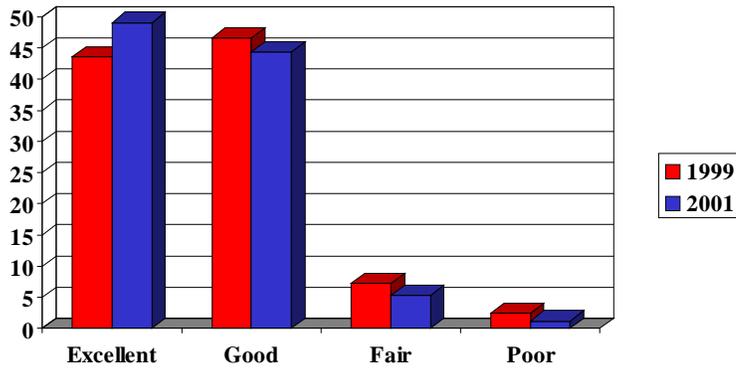
Question 17.

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.

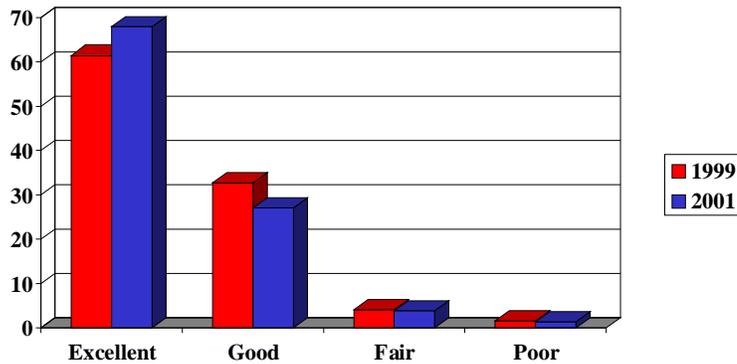
In your opinion, the safety and security along the Trail is (check one)

(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...



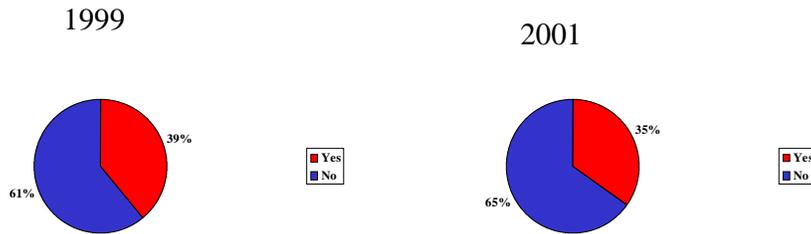
Question 19.

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?



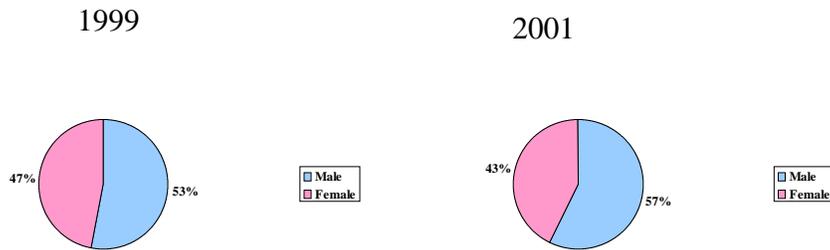
Question 20.

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.

Pennsylvania Greenway Sojourn 2004

Participant Survey Results



July 2004

Pennsylvania Greenway Sojourn 2004

Participant Survey Results

July 2004

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**Pennsylvania Greenway Sojourn 2004
Participant Survey Results**

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Pennsylvania Greenway Sojourn 2004

Executive Summary

The 2004 Greenway Sojourn contributed over \$159,000 to the economy of northwestern Pennsylvania. Every community the Sojourn passed through realized an economic benefit from spending on goods and services.

From the registration forms we know the following about the participants in the 2004 Pennsylvania Greenway Sojourn:

- ◆ There were 378 participants in the 2004 Pennsylvania Greenway Sojourn, 173 participated in the three day ride and 205 participated in the six day ride.
- ◆ The participants in the Sojourn came from 23 different states. 52% were from states other than Pennsylvania.
- ◆ 64% of the Sojourn participants were over the age of 50.

In conjunction with the Sojourn, 57.7% of the participants completed a brief survey at the end of their trip. The following is a summary of the research findings:

- ◆ 42% of the survey respondents participated in a previous Pennsylvania Sojourn.
- ◆ The Sojourn participants are a highly educated group with nearly 44% of the survey respondents having advanced degrees.
- ◆ The survey respondents were a very affluent group with 38% having household incomes in excess of \$100,000.
- ◆ Two thirds of the survey respondents purchased such items as bicycles, bicycle supplies, auto accessories, clothing and camping supplies prior to the trip with an estimated total expenditure of over \$69,000.
- ◆ Most meals were provided as part of the event, however total estimated spending on additional meals, snacks and other consumables is estimated to be over \$38,000.
- ◆ Nearly 50% of the survey respondents stayed at least one night in accommodations either prior to or after the Sojourn. Estimated spending on accommodations was over \$10,000.

Pennsylvania Greenway Sojourn 2004

Participant Survey Results

Introduction

2004 marked the third year that the Northeast Regional Office of the Rails-to-Trails Conservancy has conducted a bicycle tour on trails in Pennsylvania. This year's event was held from July 24 through July 30.

The 2004 Pennsylvania Greenway Sojourn covered trails in the northwestern corner of the state. These trails included: The East Branch Trail from Spartansburg to Titusville; The Oil Creek State Park Trail from Titusville to Oil City; The Samuel Justus Trail from Oil City to Franklin; The Allegheny River Trail from Franklin to Foxburg and the Sandy Creek Trail.

The sojourners could participate in either a three day or a six day ride. The three day riders covered approximately 111 miles. The six day riders covered approximately 201 miles. At the end of each days ride, the sojourners camped. Most meals were provided as part of the trip package although three day participants were on their own to purchase a dinner on two evenings and the six day participants provided their own meals on three evenings. Many of the participants also purchased beverages, snacks and ice cream where available along the route.

There were a total of 378 participants in the 2004 Pennsylvania Greenway Sojourn. More than half of the participants who completed a post ride survey indicated that they had not previously participated in one of the prior events. There were 173 participants in the three day ride and 205 participants in the six day ride. Originally plans were to limit the ride to a total of 300 participants but demand was so great that the number was expanded. Even so, some potential participants had to be turned away.

The ride began on Saturday, July 24 from Spartansburg PA. The weather on Saturday and Sunday was great. On Monday, however, the sky opened up and the sojourners had to endure a day of riding through heavy rain. Plans on Monday evening called for camping along the banks of the Allegheny River in Franklin, PA. Due to the heavy rain there was a serious potential for flooding and an alternative camp was established in the gym of the town's elementary school.

On Tuesday morning the riders headed south along the Allegheny River Trail. At the lunch stop a ceremony was held to dedicate a recently completed section of this trail. DCNR Secretary Michael DiBerardinis and PENNDOT Secretary Allen Biehler as well as local state legislators and trail volunteers participated in the ceremony. On Tuesday evening the three day participants departed.

The remaining three days of the 2004 Sojourn were wonderful days for riding. The weather was cool and comfortable. There were a few occasional showers but not enough to dampen the enthusiasm of the hearty six day riders.

As the comments on page 12 of this report attest, for most of the participants it was a good experience.

Pennsylvania Greenway Sojourn 2004 Participant Survey Results

Question 1: How far is your residence from the starting point of this event in Spartansburg, PA (check one)

Response	Total Sample	Three Day Riders	Six Day Riders
1 – 50 miles	4.25%	2.13%	5.93%
51 – 100 miles	5.19%	10.64%	0.85%
101 – 200 miles	17.45%	21.28%	14.41%
More than 200 miles	73.11%	65.96%	78.81%

Question 2: What is your zip code?

State	% of Participants
MA	3.3%
RI	0.5%
ME	0.5%
VT	0.5%
CT	3.3%
NJ	6.6%
NY	10.38%
PA	45.75%
DE	0.5%
MD	6.13%
VA	3.77%
WVA	1.89%
FL	0.94%
OH	9.91%
MI	0.94%
IL	0.5%
MO	0.5%
KS	0.5%
TX	0.94%
CA	0.94%
No Response	1.89%

Question 3: Have you participated in the Greenway Sojourn in the past?

Response	Total Sample	Three Day Riders	Six Day Riders
Yes	42.11%	22.34%	58.26%
No	57.89%	77.66%	41.74%

Question 4: How did you find out about this event?

Response	Total Sample
Word of Mouth	11.07%
Previous Participant	23.28%
Bike Shop	1.53%
Rails-to-Trails Conservancy Magazine	15.27%
Rails-to-Trails Conservancy Flyer	38.17%
Rails-to-Trails Conservancy Web Site	9.16%
Other Web Site	1.53%

Question 5: For the following questions, circle 5 if you were Very Satisfied and 1 if you were Very Dissatisfied

Question	Total Sample
	Average Response
Were you pleased with the food?	3.64
Were you pleased with the camp sites?	4.13
Were you pleased with the trails?	4.03
Was the event mailing helpful?	4.36
Was the <i>Ride Guide</i> helpful?	4.38
Did you get good value for your money?	4.46

Question	% 5s	% 4s	% 3's	% 2s	% 1s	% No Response
Were you pleased with the food?	21.70%	36.32%	27.36%	9.91%	3.30%	1.42%
Were you pleased with the camp sites?	37.74%	38.21%	20.28%	2.36%	0.00%	1.42%
Were you pleased with the trails?	38.21%	35.38%	16.98%	7.08%	1.42%	0.94%
Was the event mailing helpful?	50.94%	29.72%	12.74%.	1.42%	0.47%	4.72%
Was the <i>Ride Guide</i> helpful?	55.66%	27.83%	9.91%	4.25%	0.00%	2.36%
Did you get good value for your money?	60.38%	24.47%	9.43%	2.36%	0.47%	1.89%

Question 6: Should there be more after-ride activities?

Response	Total Sample	Three Day Riders	Six Day Riders
More	22.82%	28.26%	18.42%
Fewer	0.97%	1.09%	0.88%
Same	76.21%	70.65%	80.70%

Question 7: If you would return next year for the 2005 Pennsylvania Greenway Sojourn would you participate in the...

Response	Total Sample	Three Day Riders	Six Day Riders
3 Day Ride	38.92%	80.68%	19.32%
6 Day Ride	61.08%	6.96%	93.04%

Question 8: What is your preference for the scheduling for the Pennsylvania Greenway Sojourn in 2005?

Response	Total Sample	Three Day Riders	Six Day Riders
3 rd Week of July	12.92%	12.90%	12.93%
4 th Week of July	19.62%	12.90%	25.00%
No Preference	67.46%	74.19%	62.07%

Question 9: If a one day canoe paddle was offered in conjunction with the 2005 Pennsylvania Greenway Sojourn would you be interested in participating in this activity?

Response	Total Sample	Three Day Riders	Six Day Riders
Yes	80.29%	78.02%	82.05%
No	17.31%	16.48%	17.95%
Maybe	2.40%	5.49%	0.00%

Question 10: The 2005 Pennsylvania Greenway Sojourn will not be a round trip, would you be willing to pay \$65 for a motor coach to return you to the start to pick up your car?

Response	Total Sample	Three Day Riders	Six Day Riders
Yes	78.82%	77.78%	79.65%
No	17.24%	15.56%	18.58%
Maybe	3.94%	6.67%	1.77%

Question 11: Has your participation in this event influenced your purchase of:

Response	Total Sample	Three Day Riders	Six Day Riders
Bike	25.36%	28.17%	21.74%
Bike Supplies	72.46%	66.20%	76.81%
Auto Accessories	16.67%	14.08%	18.84%
Clothing	78.99%	78.87%	76.81%
Nothing	33.33%	25.00%	40.00%

Question 12: Approximately how much did you spend on the items above in preparation for this event?

	Total Sample	Three Day Riders	Six Day Riders
Average Expenditure	\$277.71	\$319.30	\$226.87

Question 13: In conjunction with your participation in this event, have you purchased any of the following?

Response	Total Sample	Three Day Riders	Six Day Riders
Bottled Water/Soft Drinks	58.97%	54.43%	63.72%
Candy/Snack Foods	62.56%	64.56%	62.83%
Sandwiches	27.18%	30.38%	25.66%
Ice Cream	67.18%	46.84%	83.19%
Alcoholic Beverages	49.23%	50.63%	49.56%
Film	17.95%	27.85%	11.50%
None of These	7.25%	13.00%	2.59%

Question 14: Approximately how much have you spent in total during the Greenway Sojourn on these items?

	Total Sample	Three Day Riders	Six Day Riders
Average Expenditure	\$68.51	\$63.43	\$73.88

Question 15: Did your participation in this event involve an overnight stay in Pennsylvania in one of the following types of accommodations?

Response	Total Sample	Three Day Riders	Six Day Riders
Stayed at least one night	47.64%	60.64%	37.29%

If Stayed at Least One Night by Type of Accommodation

Response	Total Sample	Three Day Riders	Six Day Riders
Motel/Hotel	57.47%	47.37%	61.36%
Bed and Breakfast	18.81%	24.56%	11.36%
Friend or Relatives Home	11.88%	15.79%	6.82%
Campground	15.84%	12.28%	20.45%
Other	0.00%	0.00%	0.00%

Question 16: How many nights did you stay?

Response	Total Sample	Three Day Riders	Six Day Riders
Total number of nights	152	76	76

Question 17: Below is a list of public benefits of trails. Please rate each benefit with a score of 1 to 7 (with 7 being extremely important and 1 being not very important).

Response	Average Rating
Preservation of open space	6.44
Health and fitness	6.23
Public recreation	6.27
Tourism and business development	5.27
Nature education	5.23
Access for disabled persons	5.72
Alternative transportation	5.20
Historic Preservation	5.58

Question 18: What is your gender?

Response	Total Sample
Male	49.51%
Female	50.49%

Question 19: Please identify your age group.

Age	Total Sample
15 and under	5.71%
16 – 25	2.86%
26 – 35	5.24%
36 – 45	10.95%
46 – 55	28.10%
56 - 65	32.86%
66 or older	14.29%

Question 20: What is your highest level of education?

Education	Total Sample
Less than 9 th Grade	5.34%
Some High School	0.49%
High School Graduate	9.71%
Some College (no degree)	11.65%
Associates Degree	5.83%
College Graduate	23.30%
Post Graduate Studies or Professional Degree	43.69%

Question 21: What was your approximate total household income before taxes in 2003?

Household Income	Total Sample
Under \$14,999	0.57%
\$15,000 - \$24,999	3.45%
\$25,000 - \$34,999	2.87%
\$35,000 - \$49,999	12.07%
50,000 - \$74,999	23.56%
\$75,000 - \$99,999	18.97%
\$100,000 - \$149,999	19.54%
\$150,000 - \$199,999	10.34%
\$200,000 and over	8.62%

Question 22: Are you a member of the Rails-to-Trails Conservancy?

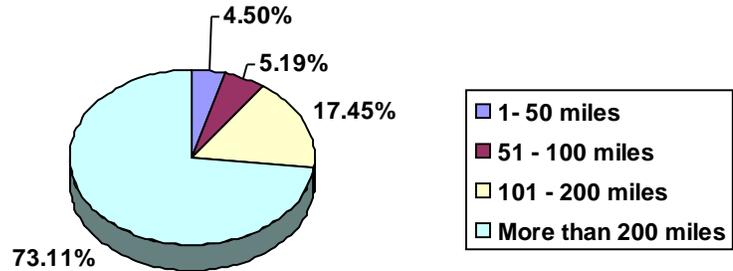
Response	Total Sample
Yes	82.32%
No	17.68%

Question 23: Please write any general comments you have regarding the 2004 Pennsylvania Greenway Sojourn

<u>Comment</u>	<u>Occurrences</u>	
	<u>3 day</u>	<u>6 day</u>
1. Need to communicate daily information (message board)	16	27
Trail conditions		
Breaks (time and location)		
Activities (time and location)		
Points of interest along the way		
Weather forecast		
List of local restaurants		
2. Control the weather – no rain, better weather	1	4
3. Provided “bag lunches”	1	8
4. Wonderful staff	18	20
5. Local residents were great	15	3
6. Good experience	14	18
7. Liked local history along the way	3	5
8. Need better restroom facilities at lunch and campsites	6	2
9. More cookies and deserts	2	4
10. More bottled water available	2	1
11. Better food/more food/healthier food	7	25
12. Utilize trails that are in better condition	1	11
13. Don’t like to eat standing up (more seating, awnings)	8	4
14. Have a “Plan B” in case of bad weather in advance	3	5
15. Loved the shower truck	4	5
16. Group too large	2	4
17. Better pre-trip route and trail conditions info.	1	9
18. Avoid “mass starts”	0	7

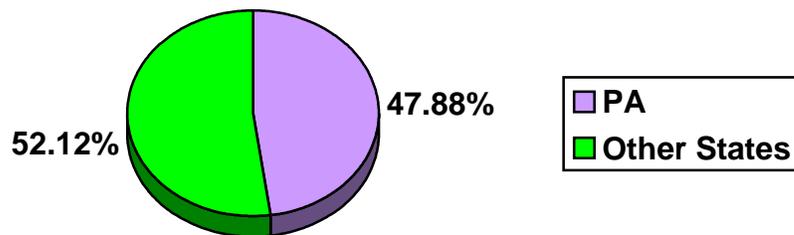
Pennsylvania Greenway Sojourn 2004 Participant Survey Results Analysis

Question 1: How far is your residence from the starting point of this event in Spartansburg, PA



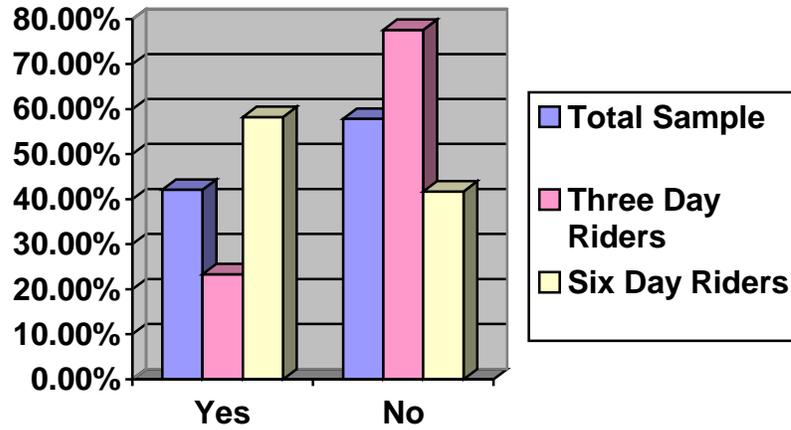
Nearly 75% of the respondents to the 2004 Pennsylvania Sojourn survey traveled more than 200 miles to reach Spartansburg where the trip began. This attests to the willingness of individuals and families to travel a great distance in order to participate in a quality experience activity.

Question 2: What is your zip code?



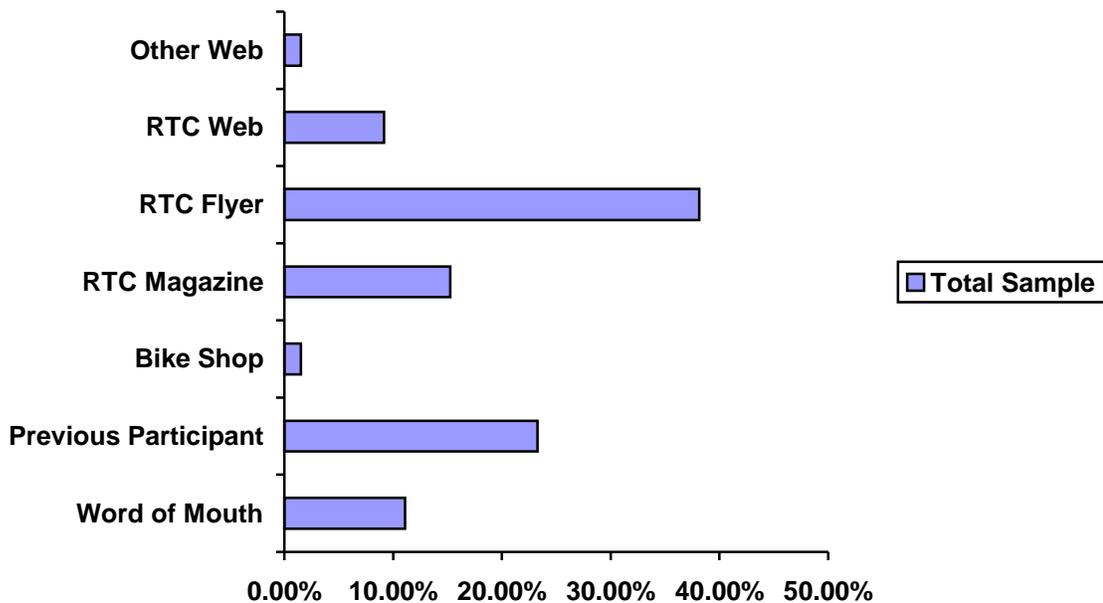
Just over 52% of the survey respondents were from states other than Pennsylvania. They came from 19 other states as far away as California, Texas and Florida. As with the distance traveled, this supports the potential for trails and bicycle touring as an attraction that can bring visitors and their dollars to Pennsylvania.

Question 3: Have you participated in the Greenway Sojourn in the past?



Just over 42% of the survey respondents had participated in a previous Pennsylvania Greenway Sojourn. Most of those who had not participated before were three day riders (77.66%). The three day ride serves as a way to introduce someone to bicycle touring as a vacation alternative without making the commitment of an entire week. Just over 58% of the six day riders had participated in a previous event. But, almost 42% of the six day riders were first timers, at least for a Pennsylvania event.

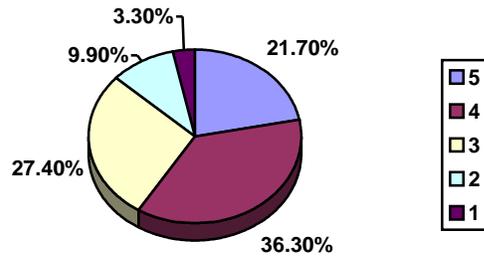
Question 4: How did you find out about this event?



The most effective ways of promoting the Sojourn are the ‘flyer’, information in the Rail-to-Trails Conservancy magazine (over 80% of participants belong to the RTC) and word of mouth. As the pool of “previous participants” grows, word of mouth will become an increasingly effective way of recruiting new participants.

Question 5: For the following questions, circle 5 if you were Very Satisfied and 1 if you were Very Dissatisfied

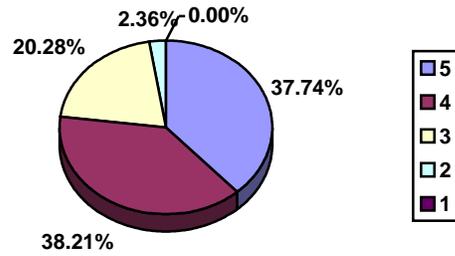
a. Were you pleased with the food?



“You can’t please all of the people all of the time”. The quality, quantity and variety of the food served during the course of the Sojourn was the area that garnered a lot of comment.



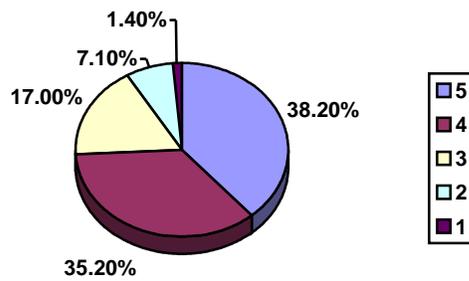
b. Were you pleased with the camp sites?



Despite less than ideal weather conditions, over 70% of the survey respondents rated the campsites either a 4 or a 5. There were many positive comments about the experience of “camping” in the gym in Franklin, PA.



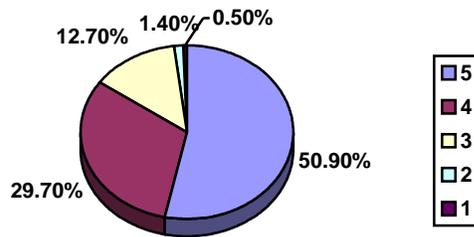
c. Were you pleased with the trails?



Despite the rain, mud, and “partially” completed trails over 70% of the survey respondents rated the trails a 5 or 4 in terms of their personal satisfaction. From the comments it was pointed out that the pre-trip literature should provide a detailed description of the trails. Many of the participants are road or rail-trail bikers and anything that resembles “single track” stresses their equipment and skill level.

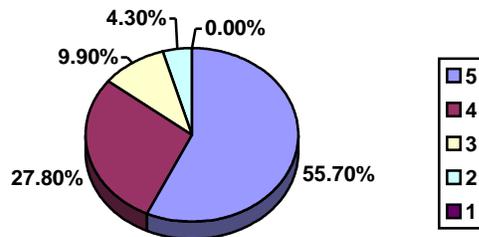


d. Was the event mailing helpful?



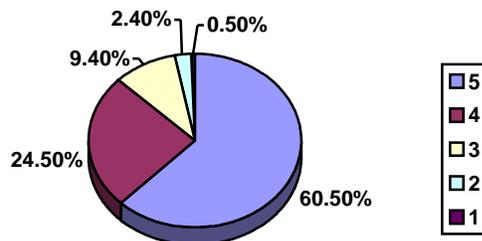
The pre-ride mailing was rated very highly by the survey participants. More than 80% rated this materials either a 5 or a 4. As noted above a more detailed description of the trails would be appreciated by many of the participants.

e. Was the *Ride Guide* helpful?



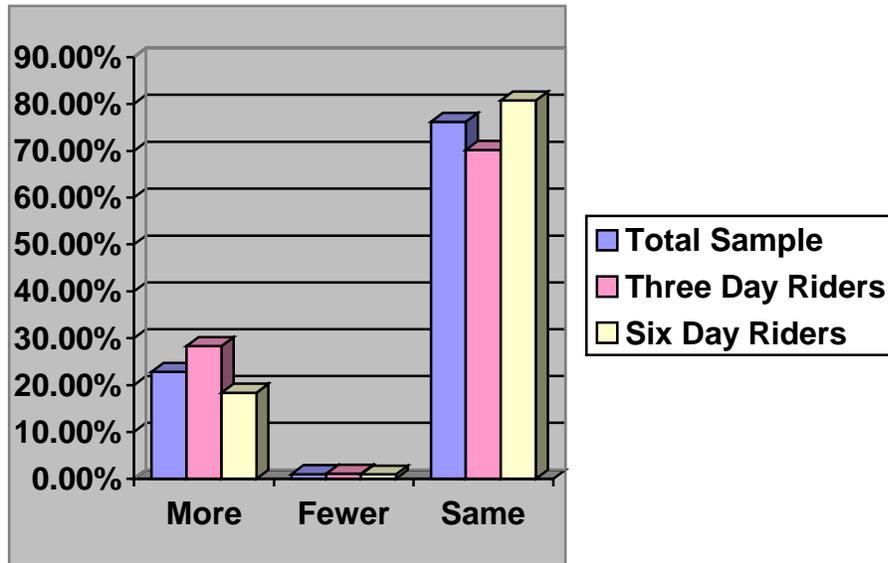
Over 80% of the participants in the survey found the *Ride Guide* helpful. The participants used it for planning the days' activities or deciding where to meet with others in their group.

f. Did you get good value for your money?



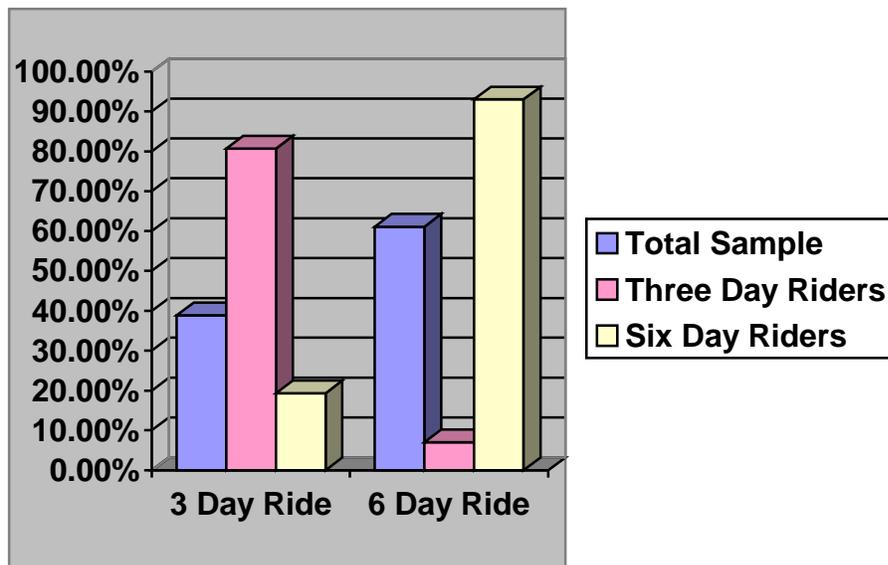
There are not very many vacations that you can take that will cost less than \$175 for three days or less than \$350 for six days. Despite the bad weather, mud, rough trails and food complaints, the survey participants overwhelmingly say that the Pennsylvania Sojourn is a great deal.

Question 6: Should there be more after-ride activities?



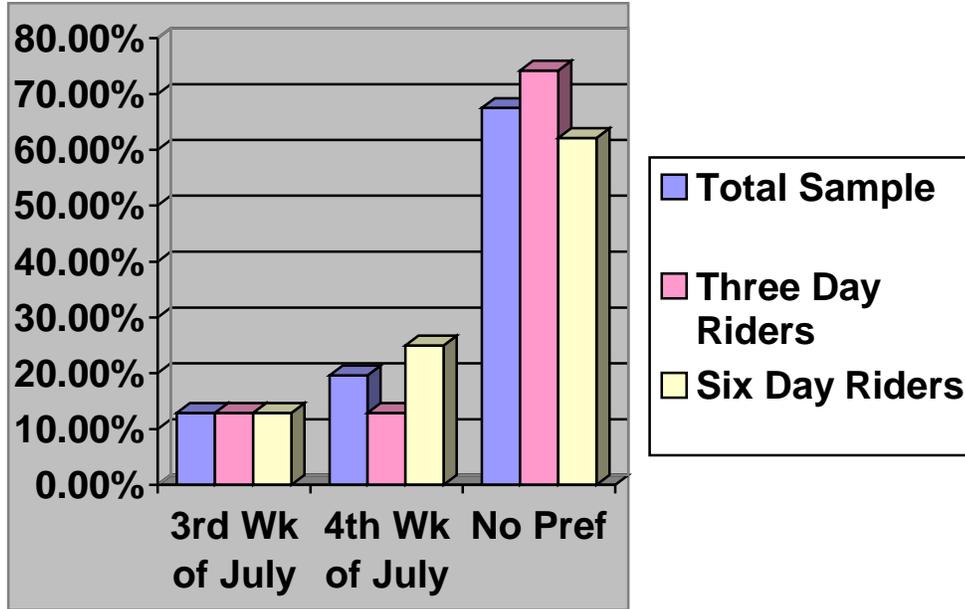
The three day riders, more than the six day riders, felt that there should be more planned evening activities. Weather may have played a factor in this perception. From the comments it was mentioned a couple of times that there should be more activities for the “kids” in the evening. Suggestions for additional activities included: “lectures” on the local history of the area, games, water activities (rafting, etc.), campfires, dances and movies.

Question 7: If you would return next year for the 2005 Pennsylvania Greenway Sojourn would you participate in the 3 day ride or the 6 day ride



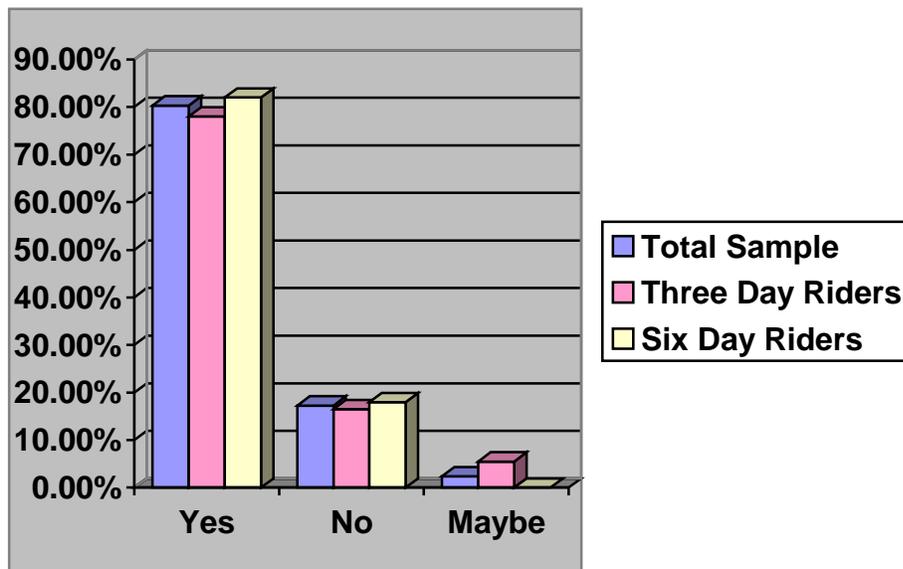
From the survey responses the three day riders will stick with the three day ride and the six day riders prefer to go the whole week.

Question 8: What is your preference for the scheduling for the Pennsylvania Greenway Sojourn in 2005?



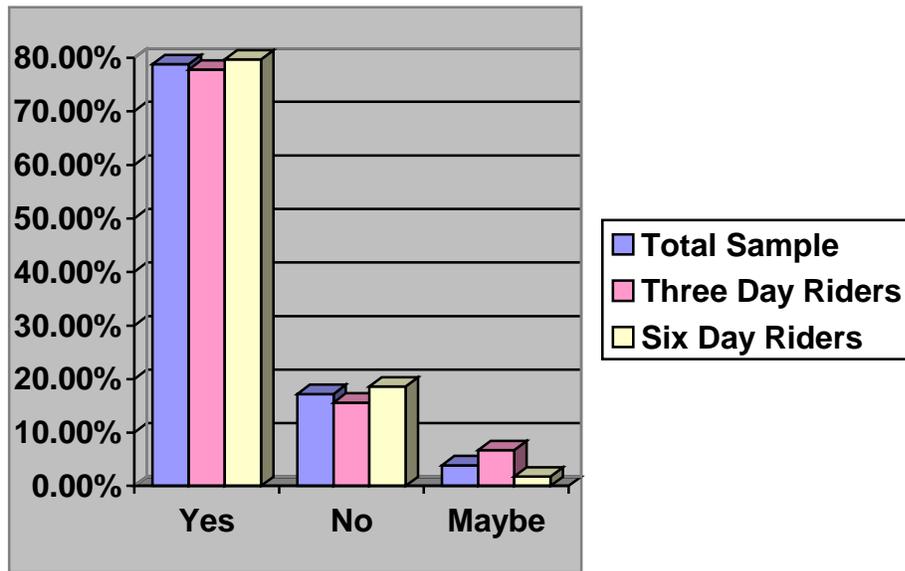
The majority of survey participants have no preference as to when the 2005 Sojourn is held in July. There is a slight preference by six day riders for the 4th week of the month.

Question 9: If a one day canoe paddle was offered in conjunction with the 2005 Pennsylvania Greenway Sojourn would you be interested in participating in this activity?



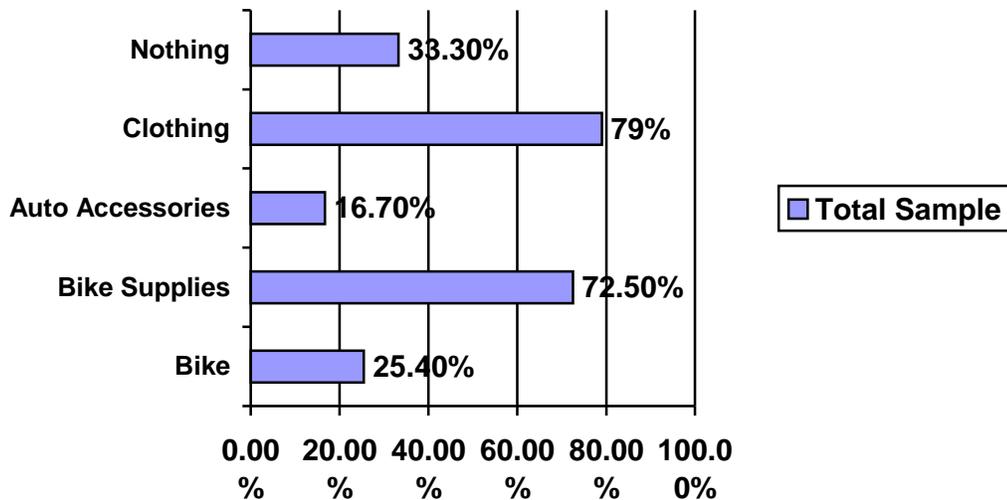
Most of the survey respondents indicated that they would welcome a day off the bike for a canoe paddle. Almost exclusively, those who did not want to participate in this activity were the older sojourners (66 years of age or older).

Question 10: The 2005 Pennsylvania Greenway Sojourn will not be a round trip, would you be willing to pay \$65 for a motor coach to return you to the start to pick up your car?



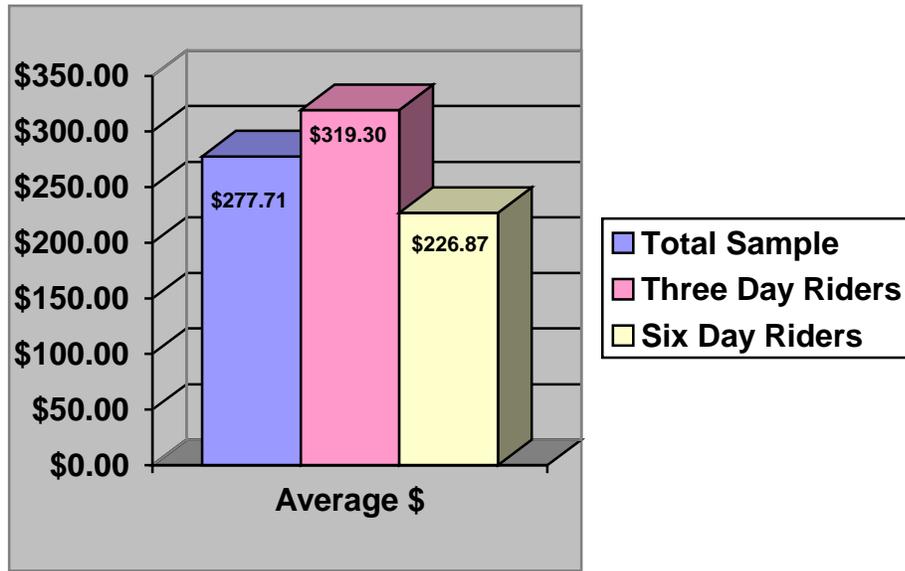
The majority of the survey participants would be willing to pay extra for a motor coach ride back to where they left their cars. From the comments, the sojourners do not like to “back track”. They prefer to be on new trails each day. However, the extra expense may be a factor in selecting the Sojourn as a vacation alternative. The destination and other aspects of the trip may outweigh the additional cost.

Question 11: Has your participation in this event influenced your purchase of:



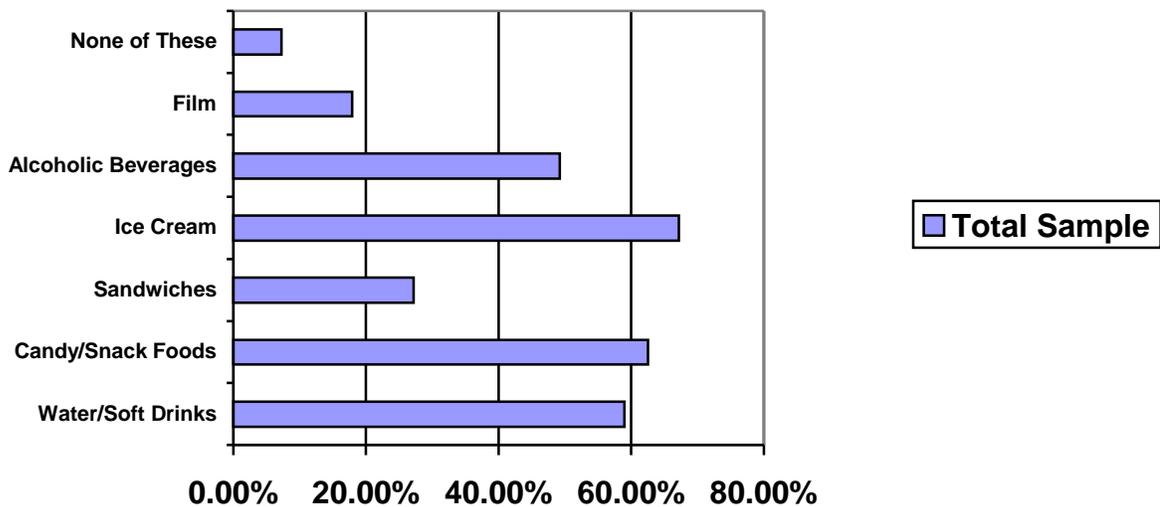
Many of the survey respondents made event related purchases in preparation for the trip. Most frequently purchased items were clothing and bicycle accessories. From the comments, many of the first time participants also had to purchase camping gear – sleeping bags, tent, etc. The sum is more than 100% due to participants purchasing items in multiple categories.

Question 12: Approximately how much did you spend on the items above in preparation for this event?



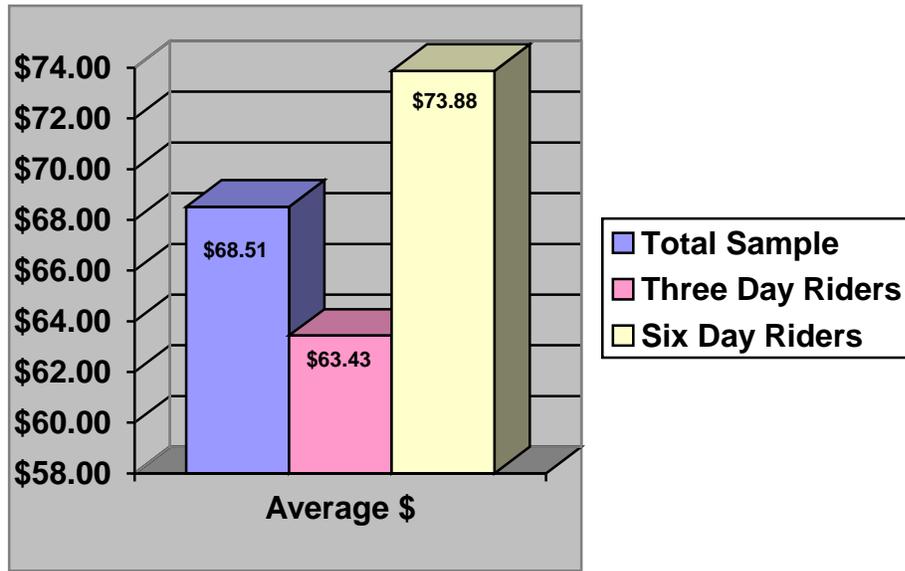
The average expenditure for the entire survey sample was \$277.71. The three day riders, many of who were first time sojourners, spent on average \$319.30 before the trip. The more experienced six day riders, who probably had a lot of the gear, still spent on average a respectable \$226.87. These expenditures were spread out over towns in twenty-three states.

Question 13: In conjunction with your participation in this event, have you purchased any of the following?



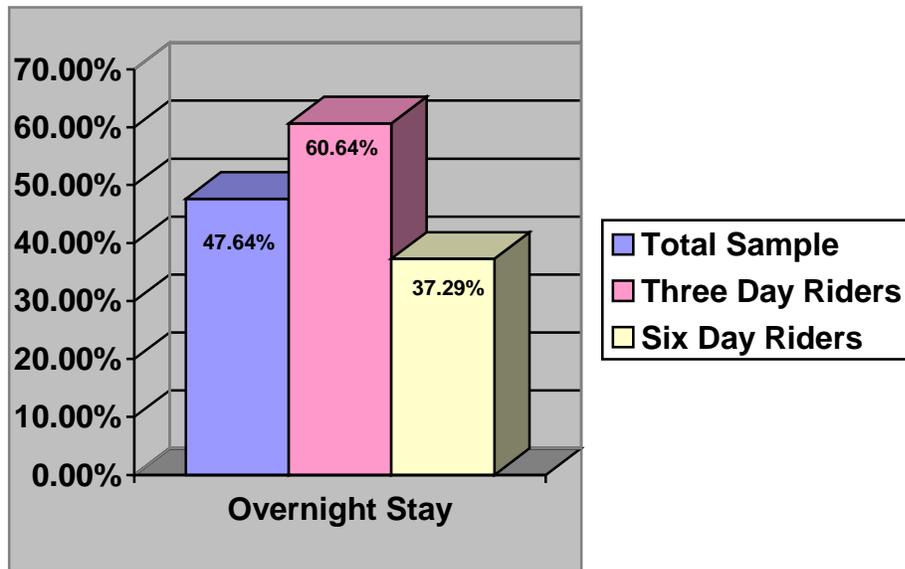
Beyond the food provided as part of the Sojourn package all of the participants were responsible for purchasing some of their own dinners. In addition, more than 90% of survey respondents made beverage and food purchases in the communities through which the group traveled. These expenditures provided an additional boost to the local economies of the towns along the route.

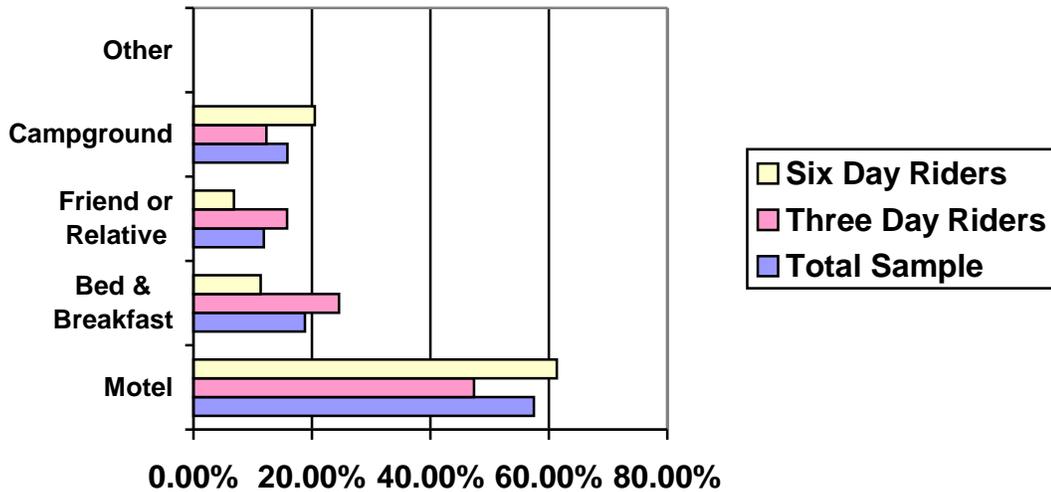
Question 14: Approximately how much have you spent in total during the Greenway Sojourn on these items?



The average survey respondent spent \$68.51 with the three day riders spending a little less (\$63.43) and the six day riders a little more (\$73.88). If the assumption is made that these spending levels are typical for all Sojourn participants, that is nearly \$25,000 over the course of a week (this does not include estimated spending for “meals on your own”).

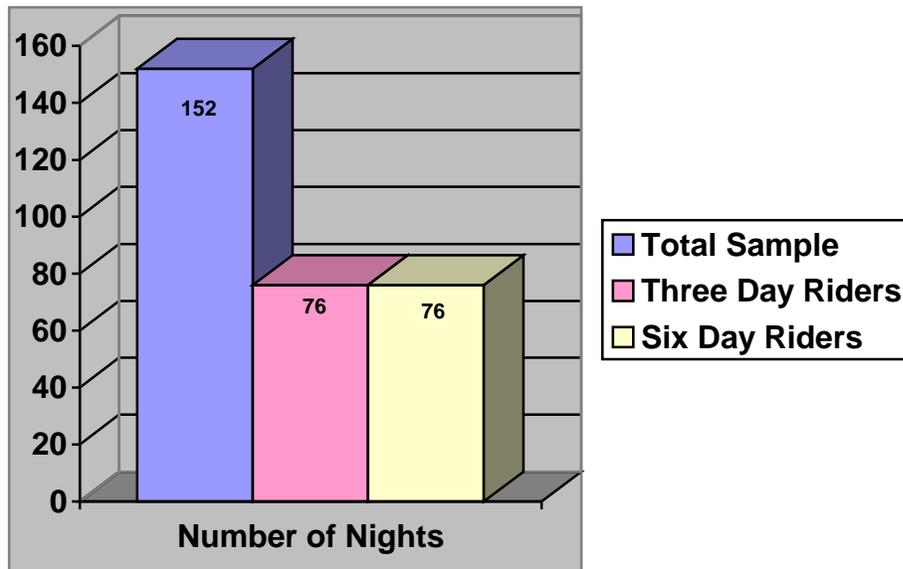
Question 15: Did your participation in this event involve an overnight stay in Pennsylvania in one of the following types of accommodations? (exclude accommodations included as part of the Sojourn package)





Because of the distance that many of the survey respondents had to travel to get to and from the Sojourn, many stayed in overnight accommodations in Pennsylvania either before or after the event, again making a significant contribution to local economies. On Monday evening July 26 after riding in the rain most of the day, sojourners took every available room in Franklin, PA.

Question 16: How many nights did you stay? (excluding those included in the Sojourn package)



From the survey sample, the number of “nights” spent in overnight accommodations was 152. There may be some “double counting” here because a husband and wife may have both completed survey forms and each stated they spent “one night in a motel”. Even so, the economic impact in towns like Spartansburg, Titusville, Oil City and Franklin can not be ignored. Based upon an average “motel” cost of \$72.00 per night provided by the Oil Heritage Region Tourists Information Bureau, total accommodation expenditures were nearly \$11,000 for those sojourners who completed the survey. Slightly more than half of the participants completed the survey form so this figure may be substantially higher.

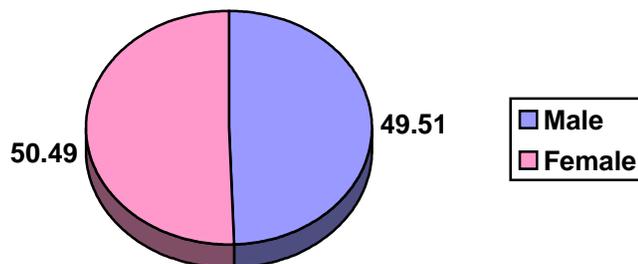
Question 17: Below is a list of public benefits of trails. Please rate each benefit with a score of 1 to 7 (with 7 being extremely important and 1 being not very important).



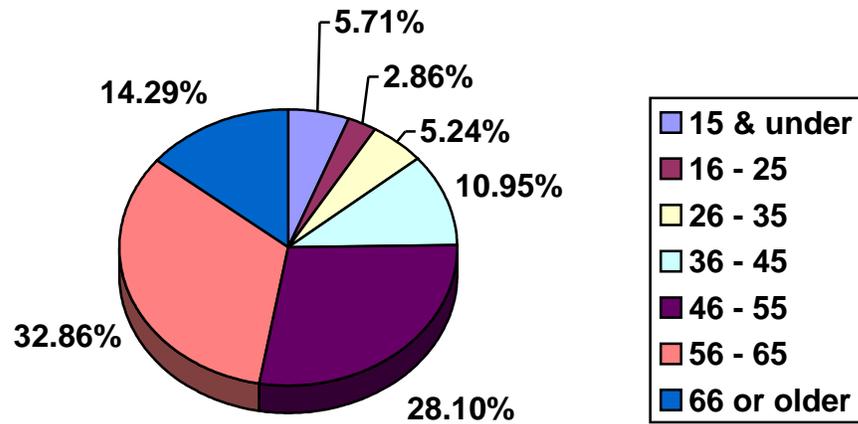
The sojourners are obviously avid trail users and trail advocates (82% belong to the Rails-to-Trails Conservancy) and rate all of the benefits highly. Interestingly, even though the participants in the Sojourn for the most part would be classified as tourists, they don't rate that benefit near the top of the alternatives. The sojourners are very well educated and probably place more emphasis on the educational and historic benefits than another sample might. Other surveys being conducted during the summer of 2004 ask this same question and a comparison may be more revealing regarding sojourners and local trail users.

DEMOGRAPHICS

Question 18: What is your gender?

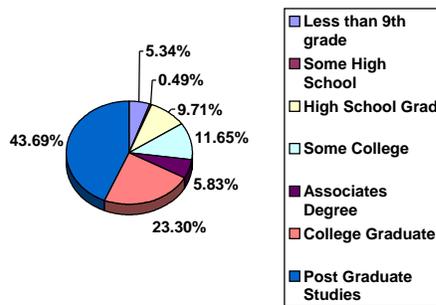


Question 19: Please identify your age group. (Check one)



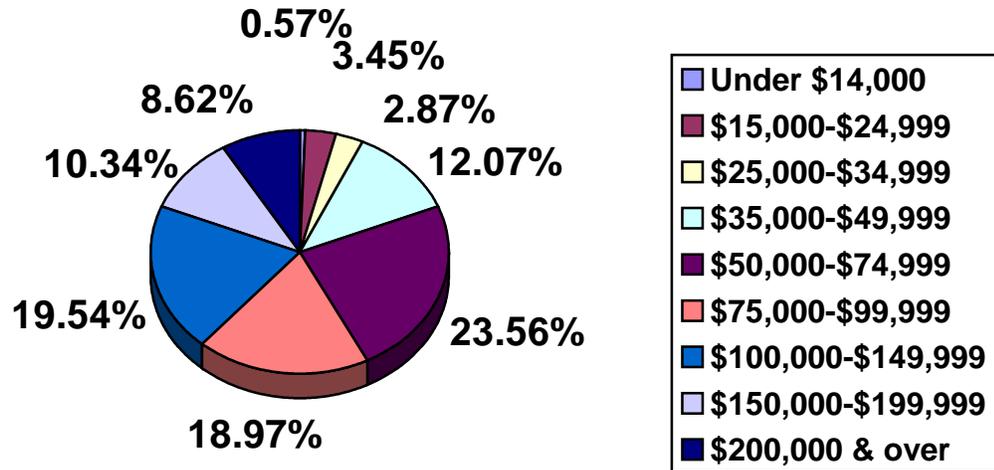
The age profile of the Sojourn survey respondents is very similar to age profiles of trail users found in other user studies conducted over the past several years. In general, trail users are over 45 years of age.

Question 20: What is your highest level of education?



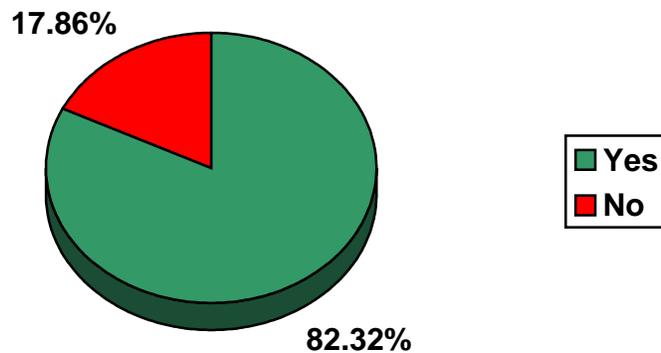
Looking at the survey respondents, the sojourners are a highly educated group. Those that have a less than 9th grade education haven't gotten to 9th grade yet. This high level of educational attainment can help to explain the interest in the educational and historic values of trails. It also points to the interest in post ride activities such as nature lectures, local history talks and museum trips.

Question 21: What was your approximate total household income before taxes in 2003?



According to the survey, the sojourners are, for the most part, a very affluent group. Most of the lower income participants are over the age of 66 and probably retired. Again, comparing this income profile with other trail user studies the sojourners have a much higher average income level. These are the types of tourists that very community would like to attract!

Question 22: Are you a member of the Rails-to-Trails Conservancy?



**Pennsylvania Greenway Sojourn 2004
Participant Survey Results
Economic Impact Summary**

Rails-to-Trails Conservancy	
Northwestern Pennsylvania catering and other support services	\$40,613.22
Harrisburg area for supplies and services	\$ 8,581.73
State and National expenditures for supplies and services	\$19,313.03
Ride Participants Pre-Trip Expenditures (bikes, camping equipment, etc.)	
Three day participants ($\$319.30 \times 173 \times .75$)*	\$41,429.18
Six day participants ($226.87 \times 205 \times .6$)*	\$27,905.01
Meals on Your Own	
Three day participants ($\$15.00$ average estimate $\times 173 \times 2$)*	\$ 5,190.00
Six day participants ($\$15.00$ average estimate $\times 205 \times 3$)*	\$ 9,225.00
Ride Participants in Trip expenditures (water, snacks, ice cream, etc.)	
Three day participants ($\$63.43 \times 173 \times .87$)*	\$ 9,546.85
Six day participants ($\$73.88 \times 205 \times .97$)*	\$14,691.04
Pre and/or Post Trip Overnight Accommodations	
Three day participants (76 nights $\times \$72.00$ average estimate)	\$ 5,472.00
Six day participants (76 nights $\times \$72.00$ average estimate)	\$ 5,472.00
TOTAL EXPENDITURES	\$187,139.06

* For the purpose of determining the overall economic impact of the Pennsylvania Greenway Sojourn the assumption has been made that the expenditures made by the survey participants are typical of the expenditures that would have been made by all participants. The calculation is (average survey respondent expenditure X number of sojourn participants X number of survey respondents that indicated they didn't spend anything)

Trail User Count Methodology References

Title	Internet Address
Indiana Trail Study Appendix B Methodology	http://www.in.gov/dot/projects/trails/m-AppendixB.pdf
Allegheny Trail Alliance Introduction Methodology	http://www.ucsur.pitt.edu/EDS/Chapter%201.pdf
Using Pedestrian Count Models to Estimate Urban Trail Use	http://www.uwex.edu/ces/cced/jrap/Lindsey1.pdf
Handbook for Bicyclists And Pedestrian Counts	http://www.bayareatrafficsignals.org/downloads/ped&bike/Handbook_Summary.pdf
Guidebook on Methods to Estimate Non-Motorized Travel: Overview of Methods Publication No. FHWA-RD-98-165	http://www.fhwa.dot.gov/tfhrc/safety/pubs/vol1/title.htm
October Use Patterns on Lansing's Riverfront Trail	http://www.msu.edu/course/prr/475/djslect/Trrpt96.doc
U.S. Department of Transportation, Federal Highway Administration. (1994). A compendium of available bicycle and pedestrian trip generation data in the United States. (FHWA-PD-95-009) Prepared by the University of North Carolina and Highway Safety Research Center. Available from the Federal Highway Administration Web site (June 4, 2003).	http://www.fhwa.dot.gov/environment/bikeped/order.htm
Hunter, W., & Huang, H. (1995). "User counts on bicycle lanes and multiuse trails in the United States." <i>Transportation Research Record</i> , 1502, p. 45–57.	
Lindsey, G. (1999). "Use of urban greenways: Insights from Indianapolis." <i>Landscape and Urban Planning</i> , 45, 145–157.	

PFK Consulting. (1994). Analysis of economic impacts of the Northern Central Rail Trail. (Prepared for Maryland Greenways Commission). Annapolis, MD: Maryland Department of Natural Resources.

U.S. Department of Transportation, Bureau of Transportation Statistics. (2000). Bicycle and pedestrian data: Sources, needs, and gaps. (BTS00-02). Washington, DC: Author.