



Heritage Rail Trail County Park 2022 User Survey And Economic Impact Analysis



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Executive Summary



This report was made possible through support from the York County Economic Alliance Trail Town Program, York County Department of Parks and Recreation, and the York County Rail Trail Authority. Trail Towns Program is a collaborative process with outreach to local governments, residents, and business owners in order for each town to reach its potential as a vibrant hub for trail users.

Heritage Rail Trail County Park (HRTCP) is a 26.5-mile, multi-use rail trail that passes through eleven municipalities as it traverses north to south through south central Pennsylvania's County of York. The rail trail extends from John C. Rudy County Park to the Pennsylvania/Maryland state line (the historic Mason Dixon Line) just south of New Freedom Borough. Here it makes a seamless connection to Maryland's Torrey C. Brown Trail (previously named the NCR Trail) and continues for an additional 21 miles. While much of the Heritage Rail Trail lies within the County-owned corridor that also contains the tracks of the Northern Central Railroad, the rails no longer exist along the Maryland trail.

The Northern Extension of the Heritage Rail Trail County Park extends from Lafayette Plaza in the City of York to John C. Rudy County Park. This segment does not follow a historic rail corridor. The trail runs along the Codorus Creek and on levees constructed by the U. S. Army Corps of Engineers. During the 2022 survey period, this segment of the trail had a closure at the Blackridge Railroad bridge underpass while a protective devise was constructed under the railroad bridge to safeguard trail users from the potential of falling debris. This segment should be fully open in 2023.

2022 marked the 23rd anniversary of the opening of the Heritage Rail Trail County Park. The trail has been managed by the York County Department of Parks and Recreation since its completion in August of 1999.

One major change to the trail since the last survey in 2017 is the addition of American Rail Bike Adventures which runs rail bike (a peddle car that runs of the rails) excursions on the rails adjacent to the Heritage Rail Trail or seven miles round trip from Seven Valleys, PA. Visitors who come to the area to ride the rail bikes see this wonderful rail trail that parallels the tracks and may come back to walk or bike on the trail.

This 2022 User Survey and Economic Impact Analysis was preceded by similar studies in 1999, 2001, 2004, 2007, 2012 and 2017. Each survey was designed to monitor trail user characteristics and the economic impact of the rail trail. In many ways the 2022 survey was very much like the previous surveys. The methodology for collecting the data was, for the most part, identical to the other seven surveys, while distribution and administration methods varied slightly. In 2022, paper survey forms and collection boxes were made available at all trailheads/parking lots from June through October. Similar to the 2017 survey, an online version of the 2022 survey was administered via Survey Monkey.

In 2017, as in 2012, data collection benefited from the installation of infrared counters placed along the rail trail. For the 2022 study, only one counter was available and was located just south of New Freedom, PA near Orwig Road. The methodology and analysis used in this study has been previously tested on Pennsylvania trails and documented in the Rails-to-Trails Conservancy's Trail User Survey Workbook <https://www.railstotrails.org/resource-library/resources/trail-user-survey-workbook-how-to-conduct-a-survey-and-win-support-for-your-trail/>.

To allow for trending, a majority of the questions on all seven surveys remained the same; however, some questions were changed, added, or deleted based on new information about the trail, its trailheads, or the addition of new data and information to support York County Department of Parks and Recreation initiatives. The analysis section of this report shows all of the trended data, as well as any new data that was collected.

Analysis of the data collected from the infrared counter and the completed surveys received from visitors indicates an estimated 263,856 annual visits to the Heritage Rail Trail County Park, resulting in a total economic impact in 2022 of between \$2.6 and \$3.9 million into the local economy.

In all, 543 completed survey forms are included in the 2022 analysis.

While the majority of trail users reside in York County (77.3%), the trail has attracted users from Maryland (13.4%), Lancaster County (2.0%), Harrisburg metro area (3.7%) and the Philadelphia metro area (0.7%). In addition, visitors from other areas accounted for 2.8% of the survey respondents in the 2022 study.

The ratio of men to women using the trail was 52.9% male and 47.1% female. The percentage of female users increased 6% over the 2017 study.

For many of the survey respondents, trail usage is a frequent occurrence. More than 51.2% of the respondents use the trail several times each week; 30.0% reported visiting once a week or several times per month. Less frequent usage, once per month (4.6%), and a few times a year (9.9%) still point to trail use as a regular activity. First time users accounted for just 4.2% of all respondents, indicating a continued opportunity for growth in visitations.

Approximately 84.9% of the trail users are over the age of 35, with the most represented age groups being 56-65 (28.5%) and 66 and older (28.4%). Users age 16-35 accounted for 13.3% of visitors. While younger users (16-18) might reflect the behavior of their parents, college-age students (18-21) and younger adults (21-35) present an opportunity to grow trail usage using events or group rides. Very few visitations (11.7%) included children under the age of 15. This age profile has been very consistent over the seven user studies and is typical of user age profiles from other trail studies across the country.

Although bicycling remains the predominant form of recreation on the Heritage Rail Trail, the percentage of cyclers is decreasing. 38.5% of respondents indicated that their primary activity on the trail is biking, compared to 43.3% in 2017. The use of the trail for walking/hiking increased to 29.3% and running/jogging increased to 12.2% since 2017. Conversely, nature study (2.3%) and cross-country skiing (0.8%) both decreased since 2017. Geocaching (0.8%) decreased a tenth of a percent and fishing (0.8%) decreased three tenths of a percent.

Overall, access to the trail is spread out between many parking areas along the rail trail. The New Freedom and Brillhart Station parking lots/trailheads are used most frequently – 13.1% and 16.5% respectively – by the survey respondents. Glatfelter Station (10.0%) was the next most popular access point.

In 2022, 64.1% of visitors indicated both weekday and weekend usage. Independently, weekday users represented 19.1%, while weekend users represented 16.7% of respondents. A majority of trail users (76.1%) make a significant time commitment when they venture out on the Heritage Rail Trail – 30.1% spend more than 2 hours and 46.1% spend between one and two hours.

In the survey, trail users were asked to classify their use of the trail into one of five categories: recreation, health/exercise, fitness training, commuting (work), and commuting (school). A majority of respondents (67.2%) classify their use of the trail as health and exercise. This represents an increase of more than 5% from the 2017 survey. Similarly, another 5.1% of respondents use the trail for fitness training. The balance of the respondents (25.9%) classify their use of the trail as recreational. Virtually no one uses the trail for commuting (0.3%), which could present an opportunity given the recent increases in gas prices; however, this initiative would require the addition of amenities along the trail.

The 2022 survey also asked visitors to report on an ancillary activity while on the trail. A majority (55.3%) participated in wildlife activities – 44.4% bird or wildlife-watching and 10.9% studied wildflowers – while others (11.1%) indicated that they visited the Trail Towns and dined in a restaurant (11.0%).

As in past surveys, respondent's knowledge of the trail came primarily from "word of mouth" (32.4%). Similarly, road-side signage and simply "driving past" informed 19.5% of the visitors about the trail. The third most important source for information was the York County Parks brochure and its website (9.6%), while other on-line sources provided information to 12.7% of visitors, a fifty percent increase over the 2017 percentage. York County Convention & Visitors Bureau (Explore York) was reported as the information source for 0.4% of all visitors.

In terms of economic impact, 67.6% of the survey respondents indicated that they had purchased some form of "hard goods" (defined as bike, bike accessories, auto accessories, running/walking shoes. Average pending for those who provided spending data was \$694 an increase of over \$300 from the 2017 survey. Most of the increase can be attributed to the purchase of e-Bikes which can cost well over \$1000. Previously, over the six prior surveys, this figure has not varied more than \$40.00.

The purchase of consumables or "soft goods" (water, soda, candy, ice cream, lunches, etc.) was reported by 34.6%, considerably lower than previously reported. Of those users who provided an amount, the average expenditure per person per trip was \$20.36, compared to \$13.76, in 2017, \$13.28 in 2012.

4.2% of the respondents indicated that their visit to the trail involved an overnight stay. On average they spent \$142.50 per night on overnight accommodations, up from \$113 in 2017.

One of the most important aspects of the user survey from the standpoint of the York County Department of Parks and Recreation is the tracking of user perceptions regarding the maintenance, safety and cleanliness and trail surface of the Heritage Rail Trail County Park. In

2022, the user rating for all four of these categories slipped from excellent too good. In all four categories, 90+% of all visitors gave ratings that were either excellent or good.

When asked if they were aware of the Heritage Rail Trail's connection to Maryland's Torrey C. Brown Trail in Maryland, 92.4% of 2022 survey respondents stated "yes", a 4% increase from 2017. Nearly a quarter of the respondents indicated that they had traveled on the Torrey C. Brown trail on their most recent trail experience.

Of the survey respondents to the 2022 Heritage Rail Trail County Park User Survey, 94.5% described themselves as White or Caucasian, 1.4% Hispanic or Latino and 4.2% other races

In conclusion, the Heritage Rail Trail County Park continues to attract a large number of users who regularly visit the trail as a means of improving their health and fitness. The 2022 survey and its six preceding surveys, demonstrate that the rail trail's economic impact in terms of both user spending and as a business stimulus has more than repaid the cost of development and on-going maintenance. Just as the Heritage Rail Trail County Park is valued by its visitors, the series of surveys conducted on the Heritage Rail Trail since its completion in 1999 are valued by numerous agencies across Pennsylvania and beyond for their ability to track and monitor variations in trail visitation and economic impact. It is a credit to the York County Department of Parks for continuing to conduct these rail trail user studies and for providing the entire rail trail community with a record of trail usage that is unique across our state and the nation.



Historical Perspective



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

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

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

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

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

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

The official opening of the Heritage Rail Trail County Park (HRTCP) was held on August 29, 1999 in conjunction with York County's 250th Anniversary. At that time, the Heritage Rail Trail

became part of the York County Park system. Today it is managed by the York County Department of Parks and Recreation as one of 11 county-owned parks.

In 2000, York County Rail Trail Authority was honored as Conservation Organization of the Year by the Pennsylvania Wildlife Federation for its work in developing the Heritage Rail Trail. The Authority also received an Achievement Award from the York County Department of Parks & Recreation in 2008. Since its opening in 1999, the Heritage Rail Trail has also received numerous recognitions, including designations by the National Park Service. In 2015, the Heritage Rail Trail and the Torrey Brown Trail were not only inducted to the Rails-to-Trails Conservancy's Hall of Fame, but The Heritage Rail Trail was also named Pennsylvania's Trail of the Year by The Pennsylvania Department of Conservation and Natural Resources.

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

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

In 2003, York County Rail Trail Authority conducted a feasibility study to assess the opportunities to extend the Heritage Rail Trail County Park through York City along the Codorus Creek to make a connection approximately five miles north at John Rudy County Park in East Manchester Township. In November 2006, construction of this Northern Extension of HRTCP began at John Rudy County Park with a destination of connecting in York City. On Earth Day, April 22, 2015, 4.3 miles of the Northern Extension stretching from John Rudy County Park to RT 30 were officially open to the public. The final phases of this project were completed in 2022 with the opening of an off-road shared use path from Lafayette Plaza to North George Street.

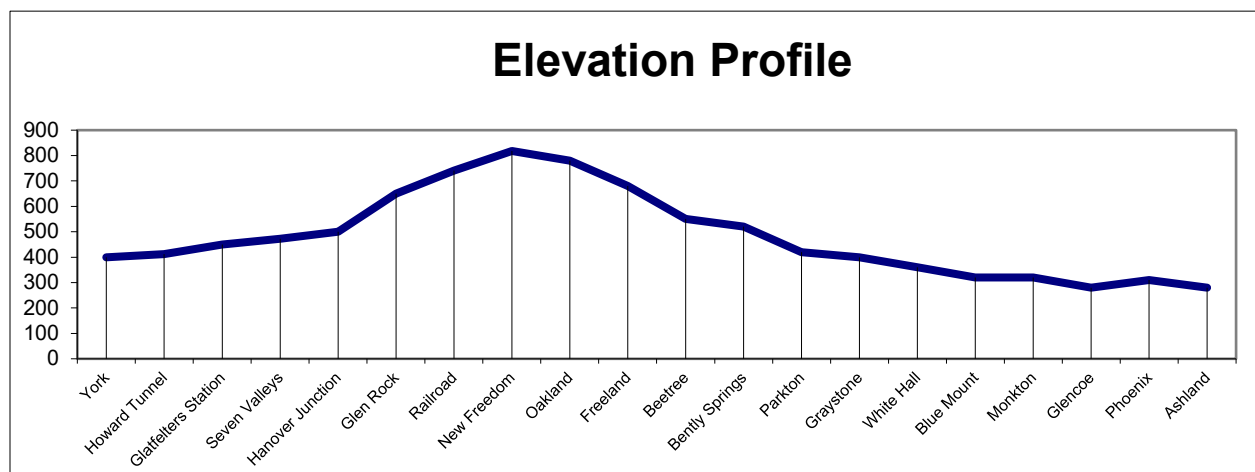
In 2016, the City of York joined with many community partners, including Downtown Inc. and York College of Pennsylvania, to improve the section of the Heritage Rail Trail from Jessup Place to West Market Street. Originally built in the 1980s as the Codorus Bikeway Path, this section was widened, repaved,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

Location Analysis



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

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



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

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

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

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

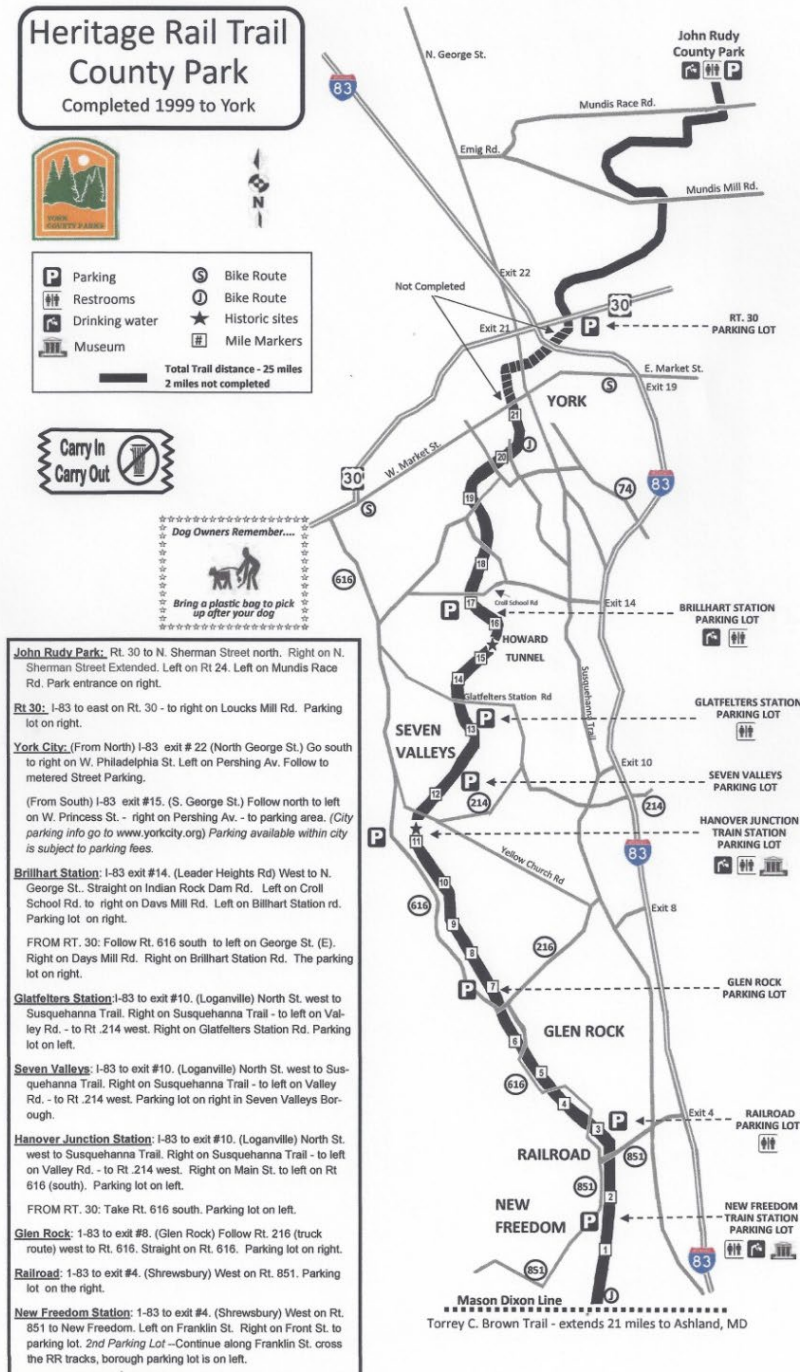
HERITAGE RAIL TRAIL COUNTY PARK MILEAGE

Landmark	Trail Miles
Maryland Line	0.00
New Freedom Train Station	1.50
Railroad Parking Lot	3.00
Glen Rock Parking Lot	6.25
Hanover Junction Train Station	10.50
Seven Valleys Bridge	11.50
Glatfelters Station Road Crossing	13.50
Howard Tunnel	15.25
Days Mill Road Crossing	17.00
Hyde	18.5
Richland Avenue Overpass	19.75
Lafayette Plaza	20.25
North George Street	20.75
Route 30	22.15
Crist Memorial Field	24.85
Rudy Park	26.50

The Northern Extension (Lafayette Plaza to Rudy Park) of the Heritage Rail Trail County Park does not use a former railroad corridor but parallels the main branch of Codorus Creek. Leaving John Rudy Park County, the Northern Extension crosses Mundis Race Road, parallels the roadway, and then turns toward the creek. The trail passes along Crist Memorial Field before crossing the Codorus Creek and passing under Mundis Mill Road to continue on the east bank of the creek. The trail gains some elevation along a wooded hill-side with views of the creek below. Leaving the woods the trail picks up on the U. S. Army Corps of Engineer levees, passing under U. S. Route 30 to a parking lot along Loucks Mill Road. The phase from Route 30 to North George Street was constructed in 2018. The off-road connection between Lafayette Plaza and North George Street was completed in 2022. One final phase will be the construction of a protected shared use path on North George Street from Arch Street to Hamilton Avenue. Construction will begin in the spring of 2023.



Heritage Rail Trail County Park Map



York County Demographics & Climate



York County Demographic Profile

Population	458,696
Per Capita Income	\$33,587
Median Household Income	\$68,940
Total Housing Units	188,598
Persons Per Household	2.51

Source: U. S. Census QuickFacts, population estimates July 1, 2021

Population Growth

	2020	2030	2040	2050
York County	464,424	504,958	542,340	581,738

Source: York County Planning Commission October, 2011

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 affect the County are from the interior of the continent. Although the day-to-day weather is sometimes affected by coastal storms, the Atlantic Ocean is considered to have only a limited influence on the total climate. In summer, the winds are generally from the southwest bringing moisture from the Gulf of Mexico into the area. Consequently, the humidity is relatively high and the climate is characterized as humid continental.

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

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

Community Involvement



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

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

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

Qualitative Values (Survey Comments)



The best way to describe the qualitative values of the Heritage Rail Trail County Park is to let the trail users tell us what they think. The following are comments that were taken from both the paper and online 2022 Trail User survey forms:

"The rail trail is a great alternative to riding on roads."

"It is always a pleasant time riding this trail. I always feel I see something different, even after 20 years."

"Love it! People are friendly."

"We also enjoy the picnic area and garden at Hanover station as well as the available rest rooms which are in good shape."

"Thank you for providing a safe place to ride and enjoy nature. My only request is that the trail surface could be better maintained. Some areas have been eroded to the point that they are uncomfortable to ride on and have been like that for a few years."

"I love the beauty of this trail. It is easy to ride & the train makes it fun. There are also clean bathrooms all along the trail. (Some stems Brillhart needs attention.). I enjoy this park very much."

"Parking in York is not user friendly for bikers, a dedicated lot would be extremely helpful. Blacktop all hills."

"Great example for other Rail Trail developers to follow."

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

"More asphalt. I love this trail, roads are too dangerous."

"Thank you for everyone who manages & maintains the trail."

"We feel very fortunate to have such a wonderful trail so close to home. Thank you."

"Would be wonderful to have it paved."

"I commend York Rail Trail for a well devised and maintained trail. Thank you."

"Ice cream/snacks along trail would be nice."

2022 Survey Results



Question 1: What is your ZIP Code?

77.3%	York County
13.4%	Maryland
2.0%	Lancaster County
3.7%	Harrisburg Metro
0.7%	Philadelphia Metro
2.8%	All other areas

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

10.5%	Daily
25.6%	Between 3 and 5 times a week
15.1%	1 or 2 times a week
14.0%	Once a week
16.0%	A couple of times a month
4.6%	Once a month
9.9%	Few times a year
4.2%	First time

Question 3: Please identify your age group. (Check one)

1.8%	under 15
3.7%	16 - 25
9.6%	26 - 35
11.6%	36 - 45
16.4%	46 - 55
28.5%	56 - 65
28.4%	66 or older

Question 4: Any children under the age of 15?

11.7%	Yes
88.3%	No

Question 5: What is your gender?

52.9%	Male
47.1%	Female

Question 6: What is your primary activity on the Trail? (Check one)

29.3%	Walking/hiking
35.4%	Biking
3.1%	eBiking
12.2%	Jogging/running
0.2%	Horseback riding
0.8%	Cross country skiing
0.8%	Geocaching
2.3%	Nature study
9.3%	Wildlife viewing
0.8%	Fishing
3.9%	Visiting a Trail Town
2.0%	Other

Question 7: Has the trail had an influence on the type / frequency of activity you participate in?

87.0%	Yes
13.0%	No

Question 8: Generally, when do you use the Trail? (Check one)

19.1%	Weekdays
16.7%	Weekends
64.1%	Both

Question 9: How much time do you generally spend of the Trail each visit?

0.4%	Less than 30 minutes
23.4%	30 minutes to 1 hour
46.1%	1 to 2 hours
30.1%	More than 2 hours

Question 10: Would you consider your use of the Trail to be for...

25.9%	Recreation
67.2%	Health and Exercise
5.1%	Fitness Training
0.3%	Commuting
0.0%	Walking to school
1.5%	Other

Question 11: During your trail visit did you?

16.8%	Bird watch
27.6%	Watch wildlife
10.9%	Study wildflowers
1.4%	Geocache
2.0%	Visit museums
12.9%	Read interpretive signs
11.1%	Visit a Trail Town
11.0%	Dine at a Restaurant or Cafe
2.5%	Shop
3.7%	Other

Question 12: How did you find out about the Trail?

32.4%	Word of mouth
6.4%	Roadside signage
13.1%	Driving past
2.4%	Newspaper
2.4%	Bike Shop
0.4%	York County Convention and Visitors Bureau
3.2%	Social media
6.4%	York County Parks Brochure
2.2%	www.ExplorePATrails.com
4.5%	www.TrailLink.com
2.8%	www.yorkcountyrails.org
3.2%	https://yorkcountypa.gov/parks-recreation.html
0.1%	www.yorkcountyrailtowns.com
20.5%	Other

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

22.9%	Bike
3.4%	eBike
17.7%	Bike supplies
4.1%	Auto accessories
17.9%	Running/walking/hiking shoes
16.8%	Clothing
7.5%	Nothing
9.8%	Other

Question 14: Approximately how much did you spend on items above in the past year (in \$)?

The average for those who indicated they had made a purchase was \$694.

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

15.5%	Bottled water/soft drinks
6.8%	Candy/snack foods
5.9%	Sandwiches
7.6%	Ice cream
14.7%	Meals at a restaurant along the Trail
0.7%	Attraction admission
3.5%	Retail store purchase
16.4%	None of these
28.9%	Other

Question 16: Approximately how much did you spend per person on the items above (in \$)?

The average for those who indicated they had made a purchase was \$20.36.

Question 17: Did your visit to the Trail involve an overnight stay in one of the following types of accommodations? (n=23)

39.1%	Motel/Hotel
4.4%	Bed and Breakfast
17.4%	Friend or Relatives Home
8.7%	Air B&B
30.4%	Campground
0.0%	Other

Question 18: How many nights did you stay in conjunction with your visit to the trail? (n=11)

The average length of stay was 2.5.

Question 19: Approximately how much did you spend on overnight accommodations per night?

The average expenditure per night was \$142.50. (n=10)

Question 20: In your opinion, the maintenance of the Trail is: (Check one)

36.4%	Excellent
56.6%	Good
6.4%	Fair
0.6%	Poor

Question 21: In your opinion, the safety and security along the Trail is: (Check one)

30.8%	Excellent
55.8%	Good
12.1%	Fair
1.3%	Poor

Question 22: In your opinion, the cleanliness of the Trail is: (Check one)

46.8%	Excellent
47.2%	Good
5.3%	Fair
0.8%	Poor

Question 23: In your opinion, the trail's surface is: (Check one)

22.3%	Excellent
64.5%	Good
11.5%	Fair
1.7%	Poor

Question 24: Are you aware that the Heritage Rail Trail County Park connects to the 21-mile Torrey C. Brown Trail (NCR Trail) at the Maryland state line?

92.4%	Yes
7.6%	No

Question 25: Did you travel on the Torrey C. Brown Trail in addition to the Heritage Rail Trail on your most recent outing?

24.6%	Yes
75.4%	No

Question 26: What portion of the Trail do you use most often? (Check all that apply)

12.9%	New Freedom to Railroad
10.8%	Railroad to Glen Rock
10.7%	Glen Rock to Hanover Junction
11.8%	Hanover Junction to Seven Valleys
12.2%	Seven Valleys to Glatfelters Station
13.5%	Glatfelters Station to Brillhart Station
8.8%	Brillhart Station to York College (Grantley Rd.)
4.0%	York College to Lafayette Plaza
3.4%	Lafayette Plaza to Route 30
6.0%	Route 30 to Crist Memorial Field
6.0%	Crist Memorial Field to John Rudy Park

Question 27: Which parking lot do you generally use when you visit the Trail? (Check all that apply)

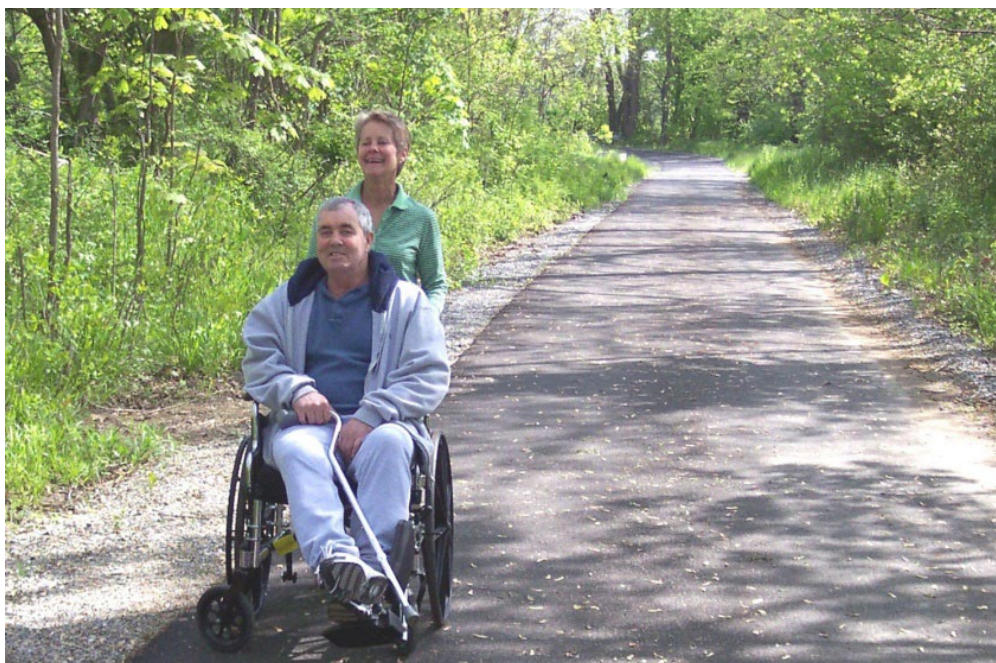
13.1%	New Freedom
8.6%	Railroad
6.4%	Glen Rock
3.8%	Centerville
8.9%	Hanover Junction
6.8%	Seven Valleys
10.0%	Glatfelters Station
16.5%	Brillhart Station
3.7%	York City, Pershing Ave.
5.6%	Route 30
3.9%	Crist Memorial Field
6.9%	John Rudy Park
5.6%	Other

Question 28: Did your trail experience begin and end at the same location?

96.6%	Yes
3.4%	No

Question 29: Which of the following best describes you?

0.6%	Asian or Pacific Islander
0.6%	Black or African American
1.4%	Hispanic or Latino
0.2%	Native American or Alaskan Native
94.5%	White or Caucasian
1.0%	Multiracial or Biracial
1.8%	A race not listed here



Methodology and Analysis



The survey form was developed by the York County Department of Parks and Recreation with the assistance of Trail Facts, York County Economic Alliance and York County Rail Trail Authority. The sample was self-selecting, meaning that trail users could decide whether or not they wanted to participate. Trail users could pick-up and return survey forms to collection boxes located at each of the trail's parking areas or mail/fax them to the York County Parks Office.

The survey was also administered online via SurveyMonkey. A QR code on the paper survey and on signage at the trailheads provided trail users easy access to the electronic survey by scanning the code with a camera on a tablet or mobile phone.

The survey was available to trail users in both paper and online format from June 2022 through October 2022. For the purpose of this analysis, 543 survey forms were completed –185 paper and 358 online; however, not all responses to each question were complete. The data presented in this analysis reflects the adjusted total based upon the total number of responses to each individual question, not the 543 usable surveys.

The following analysis highlights the data from all previous surveys – 1999, 2001, 2004, 2007, 2017 and 2022 – in order to analyze the trends and offer commentary on changes that are significant or interesting.

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



Comparative Analysis



Question 1: What is your ZIP Code?

	1999	2001	2004	2007	2012	2017	2022
York County	62.7%	63.9%	61.7%	60.8%	68.1%	75.6%	77.3%
MD	18.4%	11.6%	20.3%	25.7%	19.7%	11.7%	13.4%
Lancaster County	6.5%	2.9%	6.2%	3.6%	5.6%	3.2%	2.0%
Harrisburg Metro	4.6%	4.6%	4.3%	2.2%	1.2%	4.9%	3.7%
Philadelphia Metro	2.5%	2.9%	2.3%	2.7%	1.5%	2.4%	0.7%
All other areas	2.7%	4.2%	5.4%	4.1%	3.9%	2.2%	2.8%

While a majority of trail users live within York County, the number of Maryland visitors who participated in the 2022 survey represented the most significant increase in respondents. Conversely, the number of visitors from Harrisburg, Philadelphia, and other metro areas showed a decrease. The declining number of visitors from these areas may be due to the age of the Heritage Rail Trail – opened 24 years ago – as well as the increase in the number of trails in surrounding areas, such as Lancaster County.



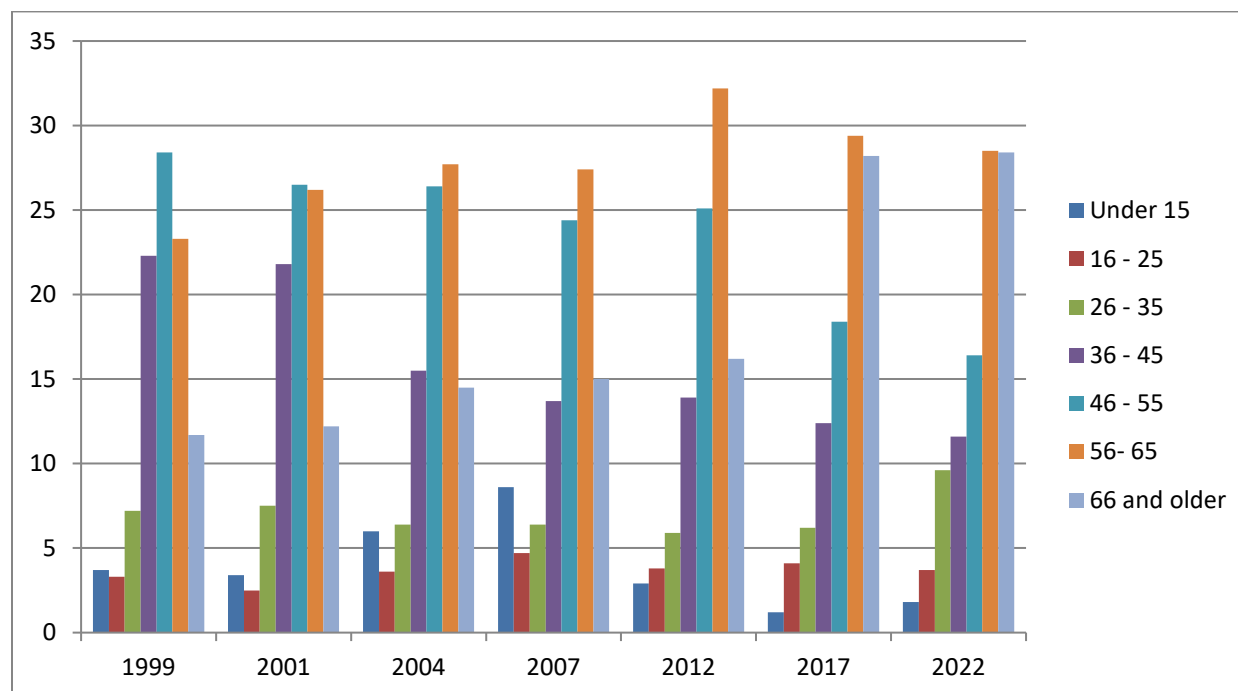
Question 2: How often, on average, do you use the Trail? (Check one)

	1999	2001	2004	2007	2012	2017	2022
Daily	1.8%	3.1%	2.0%	5.9%	7.1%	8.7%	10.5%
3-5 times/wk.	11.8%	17.7%	14.3%	16.4%	19.5%	21.4%	25.6%
1-2 times/wk.	16.7%	19.4%	20.6%	24.6%	11.8%	13.6%	15.1%
Once a week	13.3%	5.3%	8.2%	9.6%	13.6%	15.8%	14.0%
A couple times a month	21.2%	14.6%	17.7%	13.2%	13.6%	17.7%	16.0%
Once a month	21.4%	5.3%	5.4%	5.0%	5.3%	6.8%	4.6%
Few times a year	5.1%	19.6%	20.2%	14.1%	18.6%	10.4%	9.9%
First time	8.1%	14.3%	11.6%	11.4%	10.4%	5.6%	4.2%

The number of survey participants indicating that they use the trail more than two days a week has continued to increase over the last 10 years, while those visiting the trail infrequently continue to decline. First time users also continue to decline as sections of the trail have been open for over 20 years.



Question 3: Please identify your age group. (Check one)



	1999	2001	2004	2007	2012	2017	2022
Under 15	3.7%	3.4%	6.0%	8.6%	2.9%	1.2%	1.8%
16 – 25	3.3%	2.5%	3.6%	4.7%	3.8%	4.1%	3.7%
26 – 35	7.2%	7.5%	6.4%	6.4%	5.9%	6.2%	9.6%
36 – 45	22.3%	21.8%	15.5%	13.7%	13.9%	12.4%	11.6%
46 – 55	28.4%	26.5%	26.4%	24.4%	25.1%	18.4%	16.4%
56 – 65	23.3%	26.2%	27.7%	27.4%	32.2%	29.4%	28.5%
66 or older	11.7%	12.2%	14.5%	15%	16.2%	28.2%	28.4%

Though the age distribution of trail users has not changed significantly over the last 20 years, the addition of an electronic form in 2017 may have helped to improve engagement with users under age 35 and older than 66. These age groups represented the largest shifts in response to the 2017 survey with very little erosion in 2022. Visitors aged 26 to 35 grew 3.7% in 2022 and represented the largest shift in response among all age categories. Despite these changes, there is a pattern of low representation among younger trail users, especially those aged 16 to 35. This creates an opportunity to learn more about how these young visitors use the Heritage Rail Trail and the factors that would cause them to visit the trail more frequently.

Question 4: Were any children 15 years of age or younger with you on your trail experience?

	2007	2012	2017	2022
Yes	25.4%	21.0%	12.2%	11.7%
No	74.6%	79.0%	87.8%	88.3%

Since 2007 when this question was first measured, the percentage of visitors to the Trail with children under age 15 has remained low. A contributing factor could be the fact that a majority of Trail users are aged 56 and up; however, 37.6% of respondents in 2022 were aged 26 to 55 which offers another opportunity to learn about how the Trail could improve engagement with families.

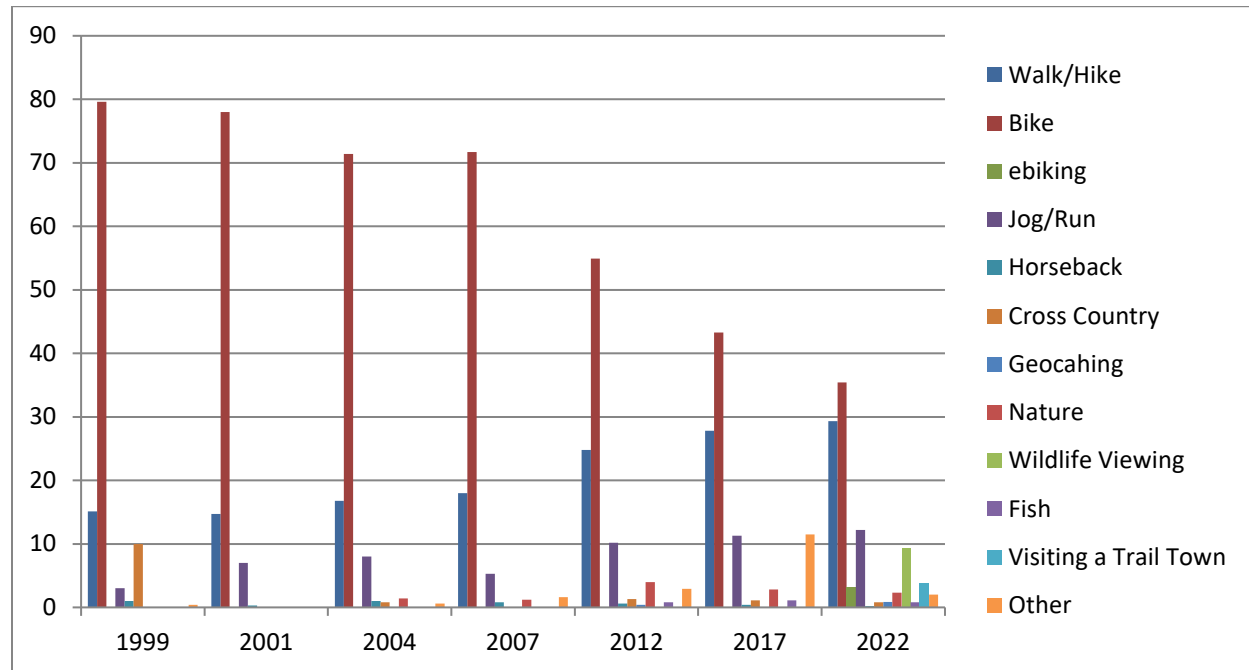
Question 5: What is your gender?

	1999	2001	2004	2007	2012	2017	2022
Male	53.1%	57.0%	58.0%	60.9%	56.0%	58.9%	52.9%
Female	46.9%	43.0%	42.1%	39.1%	44.0%	41.1%	47.1%

The percentage of males using the trail decreased over the last five years, while the percentage of females using the trail has consistently grown over the last 15 years. The number females responding to the 2022 survey represents the highest percent increase ever reported since the trail opened in 1999.



Question 6: What is your primary activity on the Trail? (Check one)



Walking/Hiking	15.1%	14.7%	16.8%	18.0%	24.8%	27.8%	29.3%
Biking	79.6%	78.0%	71.4%	71.7%	54.9%	43.3%	35.4%
eBiking							3.1%
Jogging/Running	3.0%	7.0%	8.0%	5.3%	10.2%	11.3%	12.2%
Horseback Riding	1.0%	0.3%	1.0%	0.8%	0.6%	0.4%	0.2%
Cross Country Skiing	10.0%	0.0%	0.8%	0.0%	1.3%	1.1%	0.8%
Geocaching	NA	NA	NA	NA	0.4%	0.7%	0.8%
Nature Study	NA	NA	1.4%	1.2%	4.0%	2.8%	2.3%
Wildlife viewing							9.3%
Fishing	NA	NA	NA	NA	.8%	1.1%	0.8%
Visiting a Trail Town							3.6%
Other	0.4%	0.0%	0.6%	1.6%	2.9%	11.5%	2.0%

The top four categories of activities performed on the trail in 2022 were biking/ebiking, walking/hiking, jogging/running, and wildlife viewing/nature study, respectively. These activities represented 91.6% of the respondent answers in the 2022 survey. While biking reflected a decline in 2022, nearly half of the decline was made up by the additional measurement of e-bikes to the new survey. E-bikes continue to increase in popularity and therefore are expected to continue growing over the next five years.

Question 7: Has the trail had an influence on the type / frequency of activity you participate in?

	2012	2017	2022
Yes	84.3%	88.0%	87.0%
No	15.7%	12.0%	13.0%

Access to the Heritage Rail Trail County Park continues to contribute to healthier, more active lifestyles by providing users with a safe environment to walk, hike, run, bike, and simply to just enjoy nature and the outdoors.

Question 8: Generally, when do you use the Trail? (Check one)

	1999	2001	2004	2007	2012	2017	2022
Weekdays	36.7%	49.1%	42.7%	43.9%	17.2%	19.8%	19.1%
Weekends	63.3%	50.9%	48.6%	56.1%	34.2%	19.8%	16.7%
Both	NA	NA	8.6%	NA	48.6%	60.5%	64.1%

Regular access to the trail continues to support use of the Rail Trail County Park on both weekdays and weekends. These respondents represented a majority of trail users over the last 10 years.

Question 9: How much time do you generally spend on the Trail on each visit? (Check one)

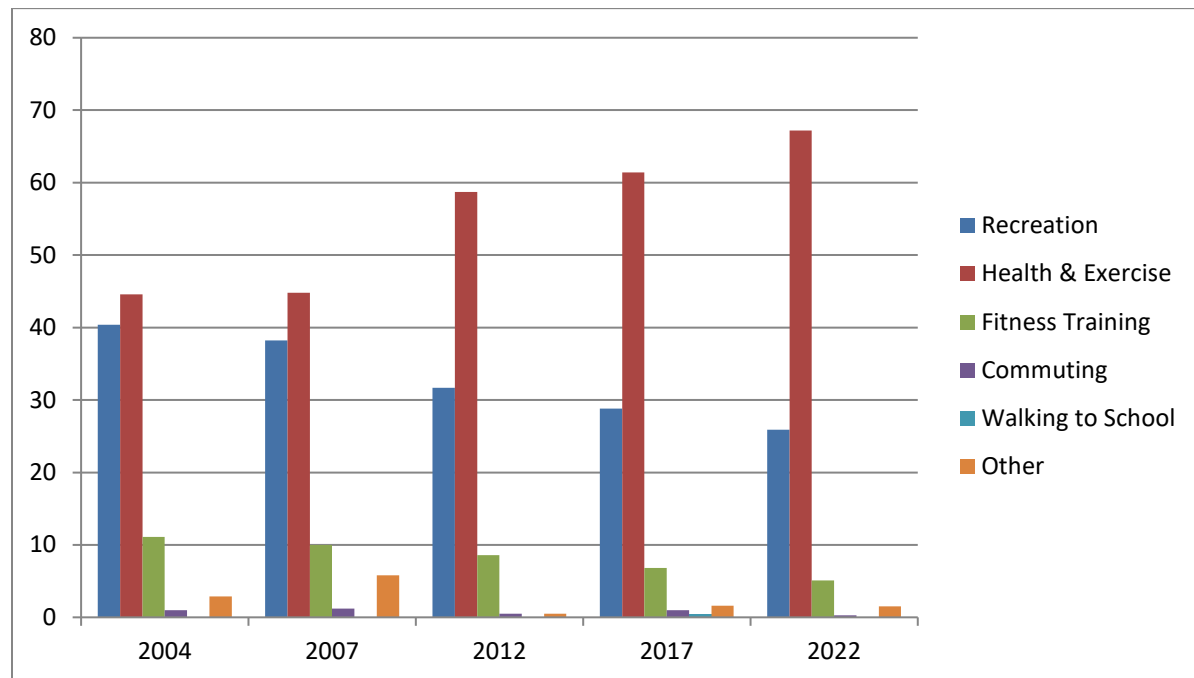


Question 9. (continued)

	1999	2001	2004	2007	2012	2017	2022
Less than 30 minutes	2.1%	0.0%	0.2%	0.9%	1.2%	1.2%	0.4%
30 minutes to 1 hour	9.6%	11.9%	14.5%	7.2%	20.9%	22.1%	23.4%
1 – 2 hours	36.0%	37.8%	40.6%	44.3%	39.9%	47.7%	46.1%
2 hours or longer	25.2%	50.3%	48.7%	47.5%	38.0%	29.0%	30.1%

A majority (76.2%) of respondents are using the trail for more than an hour, the largest group of which represents use between 1 and 2 hours. The percentage of survey respondents using the Trail for 30 minutes to one hour has continued to increase over the last 10 years. Anecdotally, this increase may be a result of accessibility of the trail, which has 10 entrances over 26 miles of trail in the county. In addition, the switch from cycling to walking as evidenced in question 6 may also contribute to this growth.

Question 10: Would you consider your use of the Trail to be for:



	2004	2007	2012	2017	2022
Recreation	40.4%	38.2%	31.7%	28.8%	25.9%
Health & Exercise	44.6%	44.8%	58.7%	61.4%	67.2%
Fitness Training	11.1%	10.0%	8.6%	6.8%	5.1%
Communting	1.0%	1.2%	0.5%	1.0%	0.3%
Walking to school	NA	NA	0.0%	0.4%	0.0%
Other	2.9%	5.8%	0.5%	1.6%	1.5%

Over 93% of respondents classify their use of the Heritage Rail Trail for recreation, health, and exercise. Outings to the Heritage Rail Trail for health and exercise (67.2%) continued to dominate the reasons that respondents visited the trail in 2022. This behavior is consistent with other surveys conducted in Pennsylvania by the Rails-to-Trails Conservancy.

Question 11: During your visit did you:

	2012	2017	2022
Bird Watch	15.5%	21.7%	16.8%
Watch wildlife	23.9%	31.0%	27.6%
Study Wildflowers	10.8%	11.1%	10.9%
Geocache	0.0%	0.7%	1.4%
Visit museums	19.2%	4.6%	2.0%
Read interpretive signs	18.4%	18.6%	12.9%
Visit a Trail Town			11.1%
Dine at a Restaurant or Cafe			11.0%
Shop	6.6%	3.9%	2.5%
Other	5.7%	8.4%	3.7%

Visitors to the Heritage Rail Trail overwhelmingly (55.3%) enjoy wildlife activities such as bird watching, studying wildflowers, and watching other wildlife. This provides an opportunity to improve destination visits for Trail users by partnering with wildlife organizations to build an experience around the activity, such as bird or wildlife identification plaques and games for kids. It might be worthwhile to explore a partnership with local schools, Boy Scouts, and Girl Scouts.

Question 12: How did you find out about the Trail?

	1999	2001	2004	2007	2012	2017	2022
Word of mouth	39.2%	41.2%	42.1%	41.9%	35.7%	31.0%	32.4%
Roadside signage	3.6%	3.1%	4.7%	3.5%	7.7%	5.9%	6.4%
Drive past	7.7%	7.0%	12.2%	5.0%	13.0%	13.8%	13.1%
Newspaper	18.5%	16.4%	12.3%	8.8%	6.6%	5.7%	2.4%
Bike shop	5.4%	2.8%	5.2%	6.1%	4.9%	5.0%	2.4%
York County Convention and Visitors Bureau	NA	NA	1.9%	0.8%	1.9%	1.6%	0.4%
Tourists' information center	2.3%	2.2%	1.3%	1.9%	NA	NA	NA
Facebook	NA	NA	NA	NA	1.1%	2.2%	NA
Social Media							3.2%
York County Parks brochure	NA	NA	NA	NA	9.4%	11.0%	6.4%
York County Parks Department	6.1%	9.5%	7.3%	5.4%	NA	NA	NA
www.ExplorePATrails.com	NA	NA	NA	NA	1.5%	1.5%	2.2%
www.TrailLink.com	NA	NA	NA	NA	1.9%	4.4%	4.5%
www.yorkcountytails.org	NA	NA	NA	NA	NA	2.9%	2.8%
www.Yorkcountypa.gov/parks-recreation	NA	NA	NA	NA	6.8%	5.1%	3.2%
www.yorkcountytailtowns.com							0.1%
Internet web site	2.3%	4.5%	3.9%	5.4%	NA	NA	NA
Other	NA	NA	NA	15.3%	9.4%	9.8%	20.5%

Word of mouth continues to be the single greatest source of information (32.4%) regarding the Heritage Rail Trail County Park, followed by driving past (13.1%) and the internet (12.8%). Interestingly, the York County Parks brochure performed at the same level as roadside signage (6.4%), which offers a question about the brochure's current distribution model. It is not performing as a reminder or persuasion to visit the trail. Rather, its use is more impulsive and last minute, as you would expect of roadside signage. Another thing to note is that Facebook has 1,057 likes (as of 12/16/22), yet the page hasn't been updated in over two years. Given the power of word of mouth for driving visitation to the Trail, there is a tremendous opportunity to be more proactive using social media to drive interest, knowledge, and experiences with the Trail. Currently, there is an NCR/Heritage Rail Trail group on the platform that is very active and communicates regularly about activities on the Trail.

Question 24: Are you aware that the Heritage Rail Trail County Park connects to the 21-mile Torrey C. Brown Trail (NCR Trail) at the Maryland state line?

	2012	2017	2022
Yes	91.5%	88.8%	92.4%
No	8.5%	11.2%	7.6%

Overwhelmingly, respondents are aware that the Heritage Rail Trail connects to Maryland's Torrey C. Brown (NCR Trail). The connection helps to bring tourism dollars directly into York County from our neighbors to the south.

Question 26: Which portion of the trail do you use most often? (Check all that apply.)

Heritage Rail Trail	2012	2017	2022
New Freedom to Railroad	14.1%	12.6%	12.9%
Railroad to Glen Rock	13.5%	11.4%	10.8%
Glen Rock to Hanover Junction	12.2%	11.5%	10.7%
Hanover Junction to Seven Valleys	14.9%	14.6%	11.8%
Seven Valleys to Glatfelters Station	13.3%	13.9%	12.2%
Glatfelters Station to Brillhart Station	13.9%	14.9%	13.5%
Brillhart Station to York College (Grantley Rd.)	9.8%	11.6%	8.8%
York College to Lafayette Plaza	4.9%	6.0%	4.0%
Lafayette Plaza to Route 30			3.4%
Route 30 to Crist Field			6.0%
Crist Field to John Rudy Park			6.0%
Northern Extension			
Route 30 to Crist Field	NA	50.5%	NA
Crist Field to John Rudy Park	3.4%	49.5%	NA

The trail entrances south of York College continue to have heavier use than those north of Brillhart Station. This could be attributed to limited parking at some of the northern entrances; however, the new link between Lafayette Plaza and North George Street that was opened in fall 2022 may improve this in the future. In addition, use of the trail north of Route 30 was hampered by the official closure of the trail at the Blackridge Railroad Bridge, which was an active construction zone during the majority of the study period. It is anticipated that this very scenic segment of the trail will see increased usage when construction is completed in 2023.

Question 27: Which parking lot do you use when you visit the Trail? (Check all that apply.)

	1999	2001	2004	2007	2012	2017	2022
Heritage Rail Trail							
New Freedom	13.8%	9.5%	9.8%	13.4%	14.7%	13.4%	13.1%
Railroad	10.2%	9.7%	9.9%	8.2%	10.0%	9.7%	8.6%
Glen Rock	11.0%	9.9%	8.8%	10.9%	11.2%	8.6%	6.4%
Centerville							3.8%
Hanover Junction	35.0%	15.3%	15.8%	17.6%	12.1%	12.3%	8.9%
Seven Valleys	NA	7.2%	10.5%	10.9%	8.7%	8.7%	6.8%
Glatfelters Station	NA	5.8%	9.8%	8.9%	10.4%	9.3%	10.0%
Hyde	0.8%	NA	NA	NA	NA	NA	NA
Brillhart Station	2.9%	15.5%	20.8%	15.3%	14.1%	19.4%	16.5%
Indian Rock Dam Road	0.8%	Closed	Closed	Closed	Closed	Closed	Closed
Drover's Bank on Richland Ave.	12.6%	7.8%	Closed	Closed	Closed	Closed	Closed
York City (Pershing Ave.)	10.2%	7.9%	6.1%	3.5%	5.0%	5.8%	3.7%
Route 30							5.6%
Crist Memorial Field							3.9%
John Rudy Park							6.9%
Other	NA	NA	3.6%	11.4%	3.6%	12.7%	5.6%
Northern Extension							
Rudy Park	NA	NA	NA	NA	3.9%	36.8%	
Crist Field	NA	NA	NA	NA	1.1%	25.0%	
Route 30	NA	NA	NA	NA	NA	38.2%	

The study in 2022 showed a shift in the use of trailheads and parking facilities at the northern end of the trail, including Brillhart Station and "Other" trail access points such as York College. As noted in the table, some of the original trail access points have been closed, such as the Drover's at Richland Avenue, which is now a WellSpan Health facility that prohibits trail user parking. The trailhead calculations in 2022 treated the Northern Extension trailheads as part of the entire trail. In 2017 because of the disconnect between the Route 30 parking lot and the City of York the Northern Extension was treated as a separate trail. With the establishment of an "on road" route from Lafayette Plaza to North George Street while the connecting trail was under construction, this segment was treated as part of the entire trail.



Heritage Rail Trail County Park User Estimates



In 1999, conducting the first estimate of Heritage Rail Trail County Park users was a significant undertaking. The methodology involved nearly 100 volunteers who visited the trail parking facilities to count cars and people.

In 2001, it was calculated that the average user visited the trail 6.6 times a year. Average visits per year steadily increased over the next six years to 7.97 in 2004 and 10.55 in 2007. While this number dropped significantly to 6.1 in 2012, average visits per year rebounded by 83.6% to 11.2 in 2017. Growth continued in 2022, as average user visits reached 12.8 times per year.

While these calculations served their purpose when collected, advances in technology and methodology have improved data collection and estimation. For example, the 2001 user methodology assumed 247,000 user visits divided by 6.6 average visits per user to equal 37,424 individual users. The assumption was made that the number of individual users remained stable and/or grew in future studies. In 2007, annual users were estimated at 394,823; however, the new methodology for counting trail traffic has proven that this was a flawed assumption.

Beginning in 2010, passive infrared counters were placed at various locations along the Heritage Rail Trail County Park to more accurately track the number of trail users. Between January 1 and April 30, three counters were placed along popular areas of the trail: one south of the Brillhart Station Trailhead, one north of the Hanover Junction Trailhead, and one north of the Railroad Trailhead. Counters were then placed at the same locations from July through November in 2011.

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

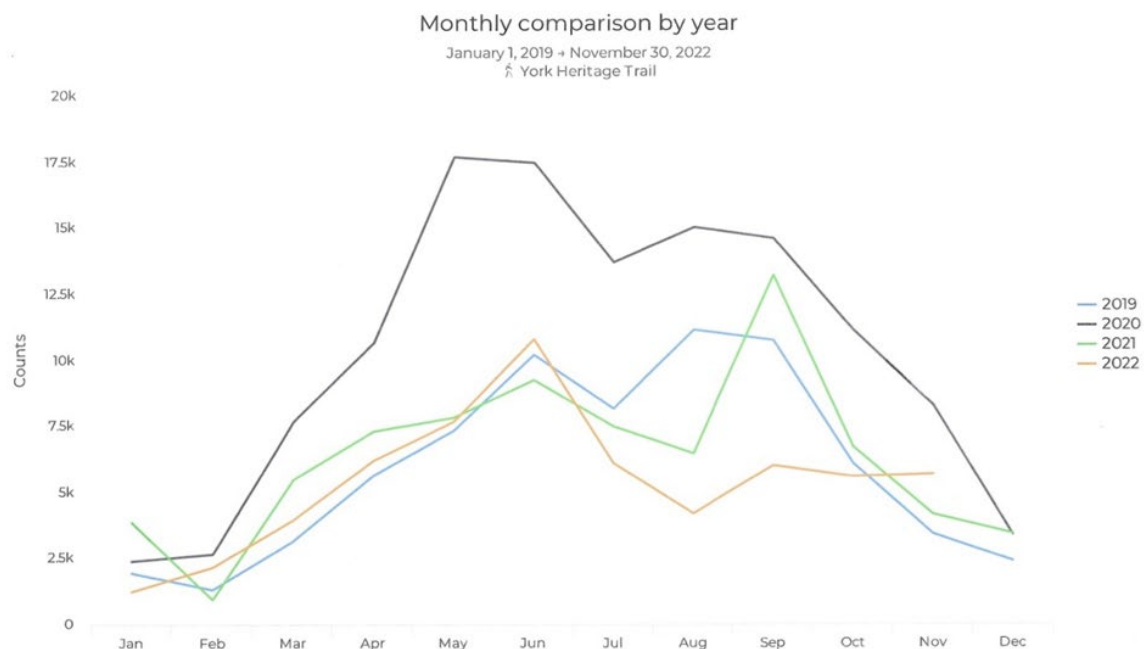
Passive infrared counters were once again used for the 2017 survey to collect actual counts of trail users. Counters were placed at the following locations: south of the New Freedom Station, north of the Railroad trailhead, north of the Hanover Junction Station, south of Brillhart Station trailhead, near the trail intersection with Jessop Place, and in John Rudy County Park along the Northern Extension.

Using Rails-to-Trails Conservancy's Trail User Count Extrapolation Model, a new trail user estimate for the Heritage Rail Trail County Park was implemented in 2017. The model, which represented 58 counter locations and more than 5 million total counts, includes data from trails across the United States.

The estimated user visits for 2017 are presented in the table below.

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

During the 2022 trail user survey only one counter was deployed on the Heritage Rail Trail. The counter was provided by the Rails-to-Trails Conservancy and was installed in July 2018. The counter is located in Shrewsbury Township, York County, Pennsylvania south of Orwig Road near the junction of the Heritage Rail Trail and The Torrey C. Brown trail. The raw counts for this counter are shown on the subsequent graph which highlights the monthly comparison by year. Following the spike in usage caused by the 2020 pandemic, trail user visits have returned to pre-pandemic levels. Based upon this observation, the user estimate from the 2017 study will be used to determine the 2022 economic impacts.



Please note that there are several limitations to the methodology that should be considered.

First, it is assumed that users of the Northern Extension would have visited the Heritage Rail Trail had the extension not been in existence.

Second, during the 2017 user count, not every visitor passed one of the counters. For example, visitors who start at Glatfelter Station would not pass a counter unless they continue on to Hanover Junction or Brillhart Station. From the 2017 data we know that 9.3% of the trail user survey respondents indicated that they use the Glatfelter Station trailhead. In addition, users heading north from Brillhart Station would not be counted until they get to Jessop Place. To capture these uncounted visits, (2017) user data was estimated based on the percentage of users by trail segment who visited the Heritage Rail Trail County Park, but may not have passed a counter.

Third, the calculation for total annual visitors excludes trail users who participated in special events along the trail. For example, the York County Rail Trail Authority holds an annual Pumpkin Walk along a quarter mile of trail just north of Seven Valleys. The 2017 event is estimated to have attracted over 5,000 visitors to the trail for this one-night event.

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



Economic Impact Analysis



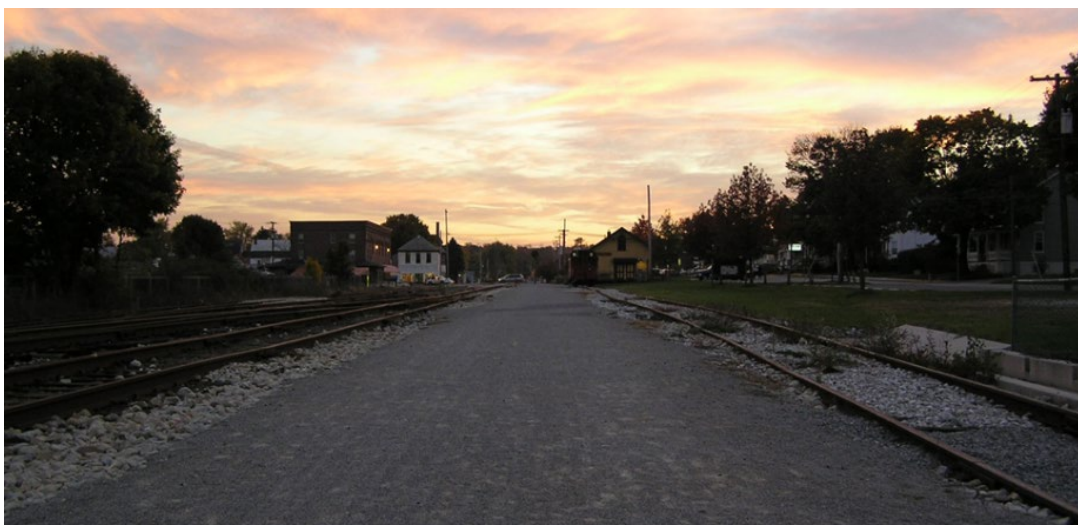
The economic impact of the Heritage Rail Trail County Park is comprised of a number of elements: hard goods, soft goods, and business enterprises along the trail.

“Hard goods” are defined as bikes, bike equipment, running/walking shoes, and other non-perishable equipment that was used for a trail visit. To gain insight into these purchases, the multi-select question, “Has your use of the Trail influenced your purchase of:”, was asked of survey participants. The resulting data provided a snapshot of these purchases, as well as an estimated spend over the past 12 months.

“Soft goods” are defined as water, soda, snacks, ice cream, lunches, and other perishable items that were purchased while using the trail. To gain insight into these purchases, the question, the multi-select question, “In conjunction with your most recent trip to the trail, did you purchase any of the following?”, was asked of survey participants. The resulting data provided a snapshot of these purchases, as well as an estimated spend on the trail visit. Understanding the value of these “soft goods” items along the trail is important for determining the economic impact of trail use to the surrounding communities.

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

Estimates of the overall economic impact of the Heritage Rail Trail County Park are presented in the table titled, “Heritage Rail Trail County Park 2022 Economic Impact Analysis” and represents a range of annual usage estimates.



Hard Goods

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

	1999	2001	2004	2007	2012	2017	2022
Bike	29.6%	27.3%	26.0%	27.4%	23.6%	22.4%	22.9%
eBike							3.4%
Bike Supplies	31.2%	32.3%	26.8%	26.8%	29.1%	24.3%	17.7%
Auto accessories	NA	NA	15.3%	13.5%	2.6%	4.7%	4.1%
Running/walking/hiking shoes	6.0%	7.5%	1.1%	9.5%	13.9%	17.3%	17.9%
Clothing	13.4%	12.4%	15.5%	13.7%	17.3%	18.1%	16.8%
Nothing	17.2%	20.5%	14.2	10.4%	11.0%	11.3%	7.5%
Other	NA	NA	NA	NA	2.4%	1.7%	9.8%

Collectively, bikes and bike supplies account for a majority of hard goods purchases made by trail users in 2022, followed by shoes and clothing. Interestingly, 19.2% (n=5) of respondents who answered "other" noted that their trail use influenced the purchase of dog walking supplies. These products overwhelmingly dominated the answers in the "other" category and present an opportunity for retailers along the trail.

Question 14: How much did you spend (in total \$) on these items in the past year?

	1999	2001	2004	2007	2012	2017	2022
Average hard goods purchased in past 12 months	\$337.14	\$367.12	\$347.11	\$367.77	\$356.59	\$328.17	\$693.54

This number has remained remarkably consistent over the first six studies. It is also very similar to the spending reported in other studies – NCR Trail 2004 - \$333.12, Pine Creek Rail Trail 2006 – \$354.97, Lebanon Valley/Conestoga Trails 2011 – \$327.46. However, the average from the 2022 study is nearly double what was reported previously. The primary explanation for this increase could be the purchase of e-bikes, which can cost thousands of dollars.



Soft Goods

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

Bottled water/soft drinks	27.2%	29.5%	26.5%	25.8%	20.3%	18.5%	15.5%
Candy/snack foods	16.2%	16.7%	12.5%	9.7%	11.0%	8.6%	6.8%
Sandwiches	8.4%	8.9%	8.5%	9.5%	7.0%	6.0%	5.9%
Ice cream	8.9%	9.9%	8.5%	11.5%	13.9%	5.5%	7.6%
Meals at a restaurant along the trail	19.1%	13.8%	17.2%	17.5%	14.5%	17.4%	14.7%
Attractions							0.7%
Retail							3.5%
Bike rental	NA	NA	NA	NA	0.2%	0.0%	
Film	2.7%	2.7%	1.2%	0.9%	NA	NA	
None of these	20.2%	18.6%	25.7%	20.9%	31.1%	41.0%	16.4%
Other	NA	NA	NA	NA	2.0%	3.1%	28.9%

Collectively, meals and beverages account for a majority of soft goods purchases made by trail users in 2022, followed closely by ice cream, candy/snacks, and sandwiches.

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

	1999	2001	2004	2007	2012	2017	2022
Average soft good purchase on most recent trail visit	\$6.47	\$8.33	\$13.97	\$12.86	\$13.28	\$13.76	\$20.36

This calculation provides a snapshot of an average spend per person, per visit to the trail. Historical data shows that average spend has increased from less than \$10 in 1999 to over \$20 in 2022. Some of this increase could be explained by fluctuations of economic conditions, such as inflation, that have occurred over the 23-year span.

In addition, new business establishments make the trail a destination for users. New Freedom has had spike in new businesses, such as Bonkey's Ice Cream, Seven Sports Bar and Grill, and Vortex Brewing, which will open in early 2023. Gunpowder Falls Brewing relocated in late 2022 and moved the new location closer to the rail trail. Two new facilities, AllCraft Brewing and Fox and Fern café, opened in Railroad right along the trail. Another new addition since the 2017 study is Simply Local, a sandwich shop that opened at the Glen Rock Mill Inn. Lastly, a new café is opening in 2023 at the old train station in Seitzville.



The following chart takes the 2022 data provided above and extrapolates the purchases over a range of annual usage. While "hard goods" 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 2022 Economic Impact Analysis

Annual Users					200,000	250,000	300,000
Category	% Usage	Avg. \$	Avg. Life	# of Trips			
Hard Goods*	67.6%	\$693.54	6 years	12.8	\$1,220,919	\$1,526,149	\$1,817,182
Soft Goods	34.6%	\$20.36			\$1,408,912	\$1,761,140	\$2,113,368

Hard Goods = (% Usage x (Avg. \$ / Avg. Life) x (# Users / Avg. Number of Trips*)
 (.676 x (\$693.54/6)) x (200,000/12.8) = \$1,220,919

Soft Goods = (% Usage x Annual Users x Users Avg. \$)
 (.346 x 13.76 x 200,000) = \$1,408,912

*Note: Hard good purchases vary by product; bikes might be replaced every 5 to 10 years, while running shoes may every couple of months. For the purpose of this analysis, it is assumed an average life of 6 years. To get a "hard goods" expenditure figure that is on an annual user basis, the hard goods expenditure needs to be broken down to a per-trip figure.

**Heritage Rail Trail County Park
2017 Economic Impact Analysis**

Annual Users					200,000	250,000	300,000
Category	% Usage	Avg. \$	Avg. Life	# of Trips			
Hard Goods*	88.7%	\$328.17	6 years	11.2	\$866,330	\$1,082,812	\$1,299,496
Soft Goods	69.0%	\$13.76			\$1,898,880	\$2,373,600	\$2,848,302

Hard Goods = (% Usage x (Avg. \$ / Avg. Life) x (# Users / Avg. Number of Trips)
 (.887 x (\$328.17/6)) x (200,000/11.2) = \$866,330

Soft Goods = (% Usage x Annual Users x Users Avg. \$)
 (.69 x 13.76 x 200,000) = \$1,898,880

**Heritage Rail Trail County Park
2012 Economic Impact Analysis**

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

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

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

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

Annual Users					300,000	350,000	400,000
Category	% Usage	Avg. \$	Avg. Life	# of Trips			
Hard Goods*	89.6%	\$367.77	6 years	10.6	\$1,554,349	\$1,823,933	\$2,085,514
Soft Goods	79.1%	\$12.86			\$3,051,678	\$3,560,291	\$4,068,904

Hard Goods = (% Usage x (Avg. \$/Avg. Life) x (# Users/Avg. Number of Trips)
 (.896 x (\$367.77/6)) x (300,000/10.6) = \$1,554,349

Soft Goods = (% Usage X Annual Users X Users Avg. \$)
 (.791 X 300,000 X 12.86) = \$3,051,678

**Heritage Rail Trail County Park
2004 Economic Impact Analysis**

Annual Users					200,000	250,000	300,000
Category	% Usage	Avg. \$	Avg. Life	# of Trips			
Hard Goods*	85.8%	\$347.11	6 years	7.97	\$1,245,589	\$1,556,986	\$1,868,383
Soft Goods	74.3%	\$13.97			\$2,075,942	\$2,594,928	\$3,113,913

Hard Goods = (% Usage x (Avg. \$/Avg. Life) x (# Users/Avg. Number of Trips)
 (.858 x (\$347.11/6)) x (200,000/7.97) = \$1,245,589

Soft Goods = (% Usage X Annual Users X Users Avg. \$)
 (.743 X 200,000 X 13.97) = \$2,075,942

Heritage Rail Trail County Park 2001 Economic Impact Analysis

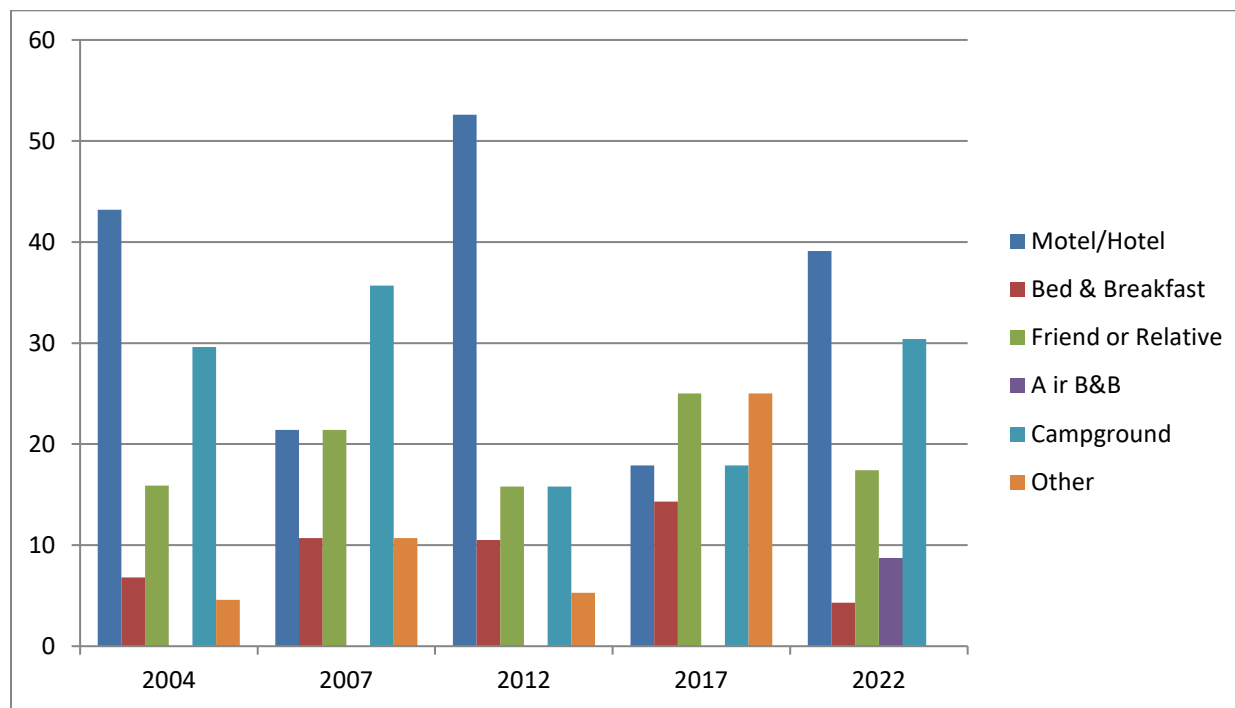
Annual Users					100,000	200,000	250,000
Category	% Usage	Avg. \$	Avg. Life	# of Trips			
Hard Goods*	72.2%	\$367.12	6 years	6.6	\$669,345	\$1,338,690	\$1,673,362
Soft Goods	65.6%	\$8.33			\$546,448	\$1,092,896	\$1,366,120

Hard Goods = (% Usage x (Avg. \$/Avg. Life) x (# Users/Avg. Number of Trips)
 (.722 x (\$367.12/6)) x (100,000/6.6) = \$669,345

Soft Goods = (% Usage X Annual Users X Users Avg. \$)
 (.656 X 100,000 X 8.33) = \$546,448

Another aspect of the trails economic impact that was researched during the 2004, 2007, 2012, 2017 and 2022 surveys involved those users who stayed overnight in local accommodations in conjunction with their trail visit. The following charts provide an analysis of the data collected.

Question 17a: Did your visit to the Trail involve an overnight stay in one of the following types of accommodations?



Question 17a (continued)

	2004	2007	2012	2017	2022
Motel/Hotel	43.2%	21.4%	52.6%	17.9%	39.1%
Bed & Breakfast	6.8%	10.7%	10.5%	14.3%	4.3%
Friend/Relative Home	15.9%	21.4%	15.8%	25.0%	17.4%
Air B & B					8.7%
Campground	29.6%	35.7%	158%	17.9%	30.4%
Other	4.3%	10.7%	5.3%	25.0%	0.0%

In 2022, there was a significant shift in the type of accommodations used when visiting the trail. Stays at both a motel/hotel and a campground increased considerably versus 2017. Conversely, standard bed & breakfast accommodations decreased by 10%. Based on the data, it can be inferred that the B&B stays shifted to Airbnb which was not a default category in 2017, rather these stays were reported as "other".

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

In 2022, the average expenditure per night was \$147.50 (n=10), which is \$34 greater than the 2017 average. The increase in spend could be a result of the significant shift away from friend's homes and B&Bs to stays at motels/hotels. The average stay in 2022 was 2.5 nights.



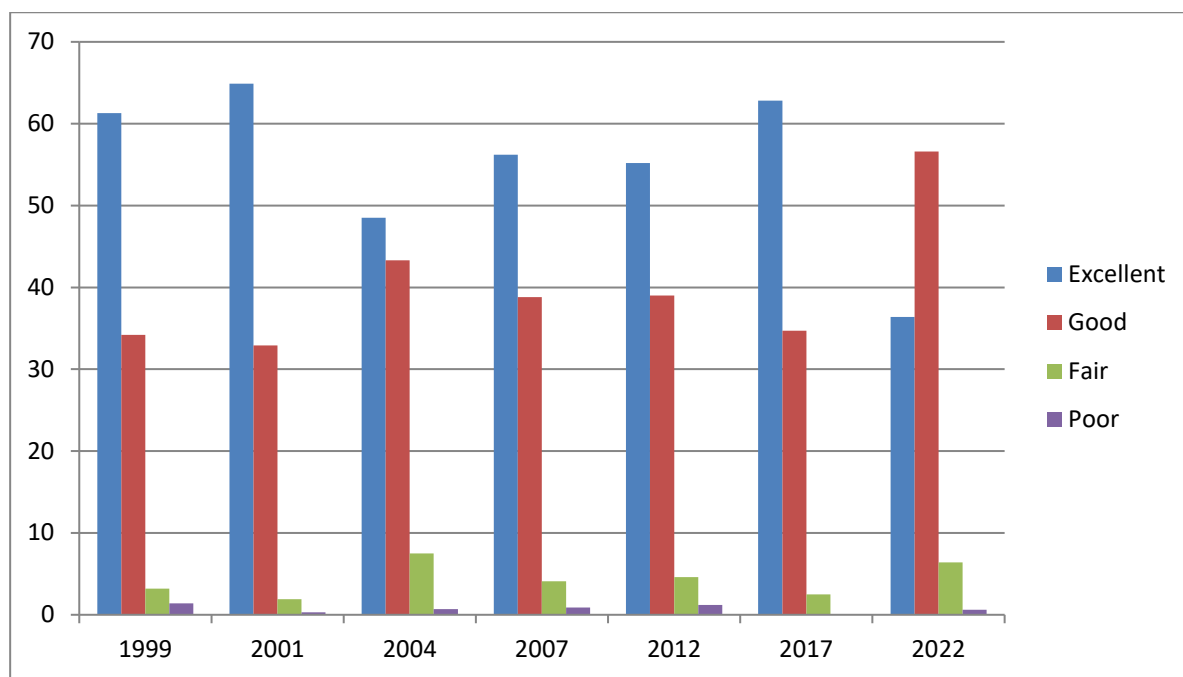
Trail Maintenance, Security and Cleanliness



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

By collecting feedback on maintenance, safety, and cleanliness in each subsequent study, the York County Department of Parks and Recreation obtains valuable input directly from trail users who are key to the long-term success of the Heritage Rail Trail County Park.

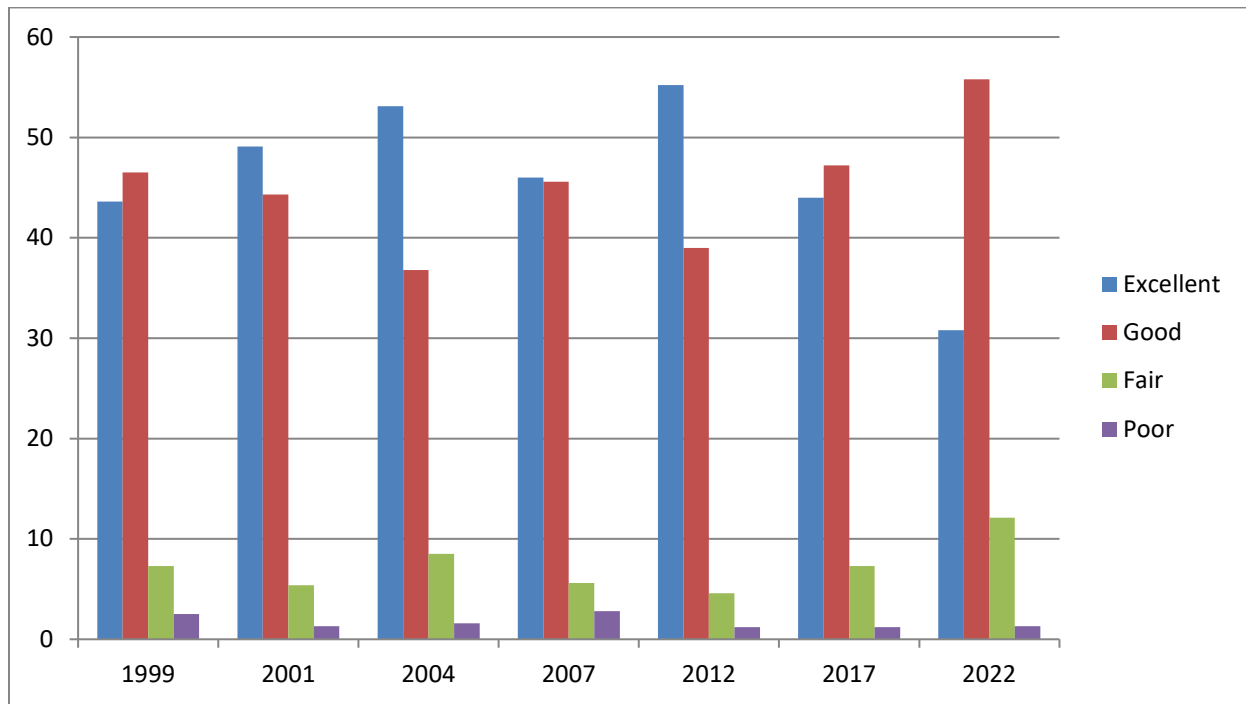
Question 20: In your opinion, the maintenance of the Trail is: (Check one.)



	1999	2001	2004	2004	2012	2017	2022
Excellent	61.3%	64.9%	48.5%	56.2%	53.2%	62.8%	36.4%
Good	34.2%	32.9%	43.3%	38.8%	41.4%	34.7%	56.6%
Fair	3.2%	1.9%	7.5%	4.1%	5.1%	2.5%	6.4%
Poor	1.4%	0.3%	0.7%	0.9%	0.3%	0.0%	0.6%

Since the trail opened in 1999, the maintenance of the Heritage Rail Trail has been rated "excellent" or "good" by more than 93% of survey respondents. In 2022, the slip from "excellent" to "good" may be an indication that some trail sections need to be resurfaced or that there were weather related issues (puddles, ruts) that need to be addressed.

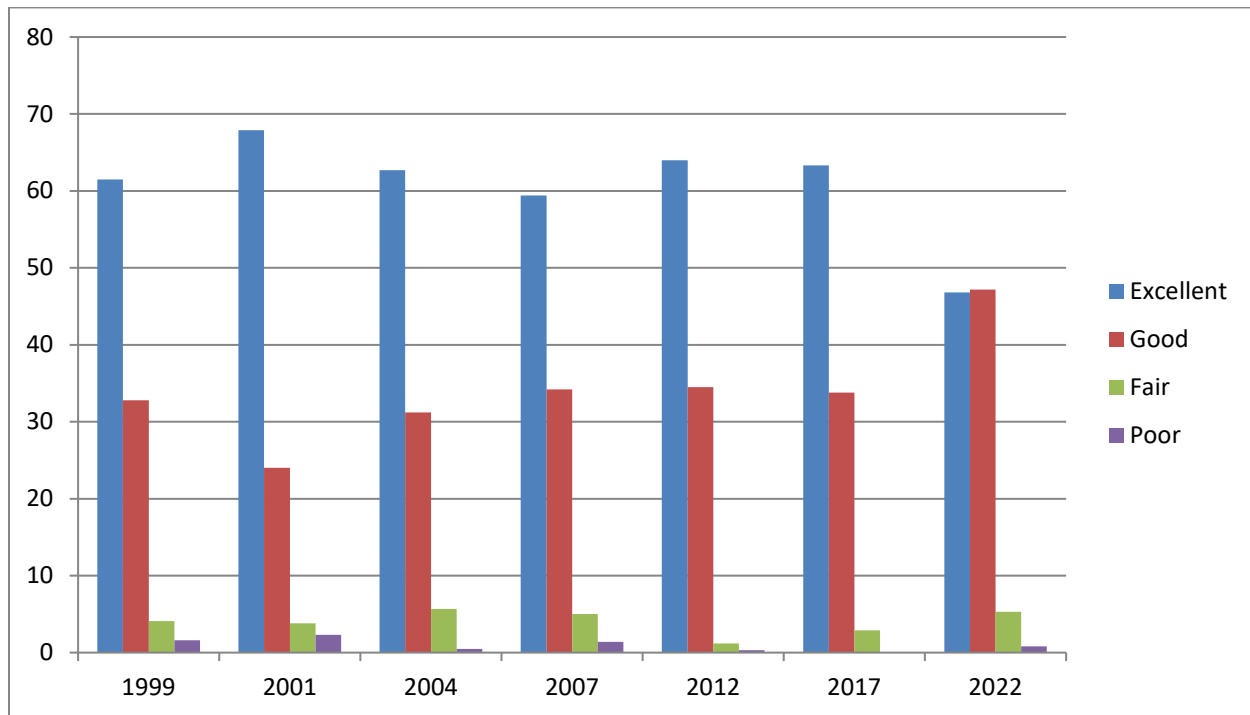
Question 21: In your opinion, the safety and security along the Trail is: (Check one.)



	1999	2001	2004	2007	2012	2017	2022
Excellent	43.6%	49.1%	53.1%	46.0%	55.2%	44.0%	30.8%
Good	46.5%	44.3%	36.8%	45.6%	39.0%	47.4%	55.8%
Fair	7.3%	5.4%	8.5%	5.6%	4.6%	7.3%	12.1%
Poor	2.5%	1.3%	1.6%	2.8%	1.2%	1.2%	1.3%

The Heritage Rail trail has had very few security issues, which could be attributed to the physical appearance of park rangers and trail ambassadors who help to create a sense of security for visitors. In addition, the daily usage rate and the high volume of visitors from sun-up until sun-down is a constant source of trail surveillance. It is important to note that older users who filled out the paper surveys in 2022 expressed more concern about security.

Question 22: In your opinion, the cleanliness of the Trail is: (Check one.)

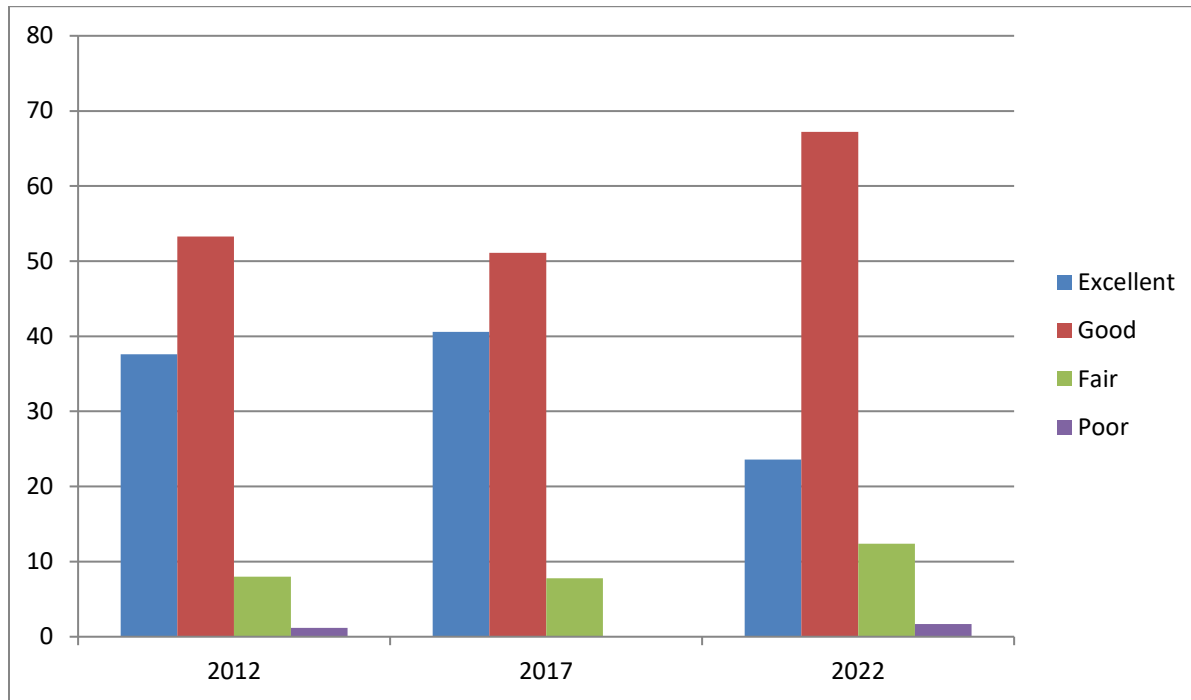


	1999	2001	2004	2007	2012	2017	2022
Excellent	61.5%	67.9%	62.7%	59.4%	64.0%	63.3%	46.8%
Good	32.8%	24.0%	31.2%	34.2%	34.5%	33.8%	47.2%
Fair	4.1%	3.8%	5.7%	5.0%	1.2%	2.9%	5.3%
Poor	1.6%	2.3%	0.5%	1.4%	0.3%	0.0%	0.8%

Visitors to the trail have consistently rated cleanliness very high, which could be attributed to the decision by the Parks Department to have a “carry in, carry out” trash policy. Even when some users disrespect the policy, trail visitors often pick up the litter in order to maintain cleanliness on this admired community asset.



Question 23: In your opinion, the trail surface is: (Check one.)



	2012	2017	2022
Excellent	37.6%	40.6%	23.6%
Good	53.3%	51.1%	67.2%
Fair	8.0%	7.8%	12.4%
Poor	1.2%	0.5%	1.7%

Overwhelmingly, trail visitors feel that the trail surface is “excellent” or “good”. York County Parks does regular maintenance to keep the trail surface in fine condition for a wide variety of activities. The decline in excellent ratings may be an indication that the trail surface is showing its age.



Appendix A – 2022 Trail User Survey



2022 Heritage Rail Trail County Park – User Survey

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

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

15. In conjunction with your most recent trip to the trail, did you purchase any of the following? (circle all that apply)
Beverages Candy/Snack foods Sandwiches Ice cream Meals at a restaurant near the trail Attraction
admission Retail store purchase None of these Other (please specify) _____

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

17. Did your visit to the trail involve an overnight stay in one of the following types of accommodations? (circle one)
Motel/Hotel Bed and Breakfast Friend or relatives home Airbnb/Private home Campground
Other (please specify) _____

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

19. Approximately how much did you spend on overnight accommodations per night? \$ _____

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

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

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

23. In your opinion, the trail's surface is (circle one) Poor Fair Good Excellent

24. Are you aware that the Heritage Rail Trail County Park connects to the 21-mile Torrey C. Brown Trail (NCR Trail) at the Maryland state line? (circle one) Yes No

25. Did you travel on the Torrey C. Brown Trail in addition to the Heritage Rail Trail on your most recent outing?
Yes No

26. What portion of the trail do you use most often? (circle all that apply)
New Freedom to Railroad Railroad to Glen Rock Glen Rock to Hanover Junction Hanover Junction to
Seven Valleys Seven Valleys to Glatfelters Station Glatfelters Station to Brillhart Station Brillhart
Station to York College (Grantley Rd.) York College to Lafayette Plaza Lafayette Plaza to Route 30 Route 30 to
Crist Memorial Field Crist Memorial Field to John Rudy Park

27. Which trail access point do you generally use when you visit the trail? (circle all that apply)
New Freedom Railroad Glen Rock Centerville Hanover Junction Seven Valleys Glatfelters Station Brillhart
Station York City (Pershing Ave.) Route 30 Crist Memorial Field Rudy Park Other (please specify the
street) _____

28. Did your trail experience today begin and end at the same location? Yes No

29. Which of the following best describes you? (please select one answer)
Asian or Pacific Islander Black or African American Hispanic or Latino Native American or Alaskan Native White
or Caucasian Multiracial or Biracial A race not listed here

30. Additional comments _____