

NCR Trail 2004 User Survey and Economic Impact Analysis



April 2005

**NCR Trail
2004 User Survey
and Economic Impact Analysis**

April 2005

Prepared for:

Maryland Department of Natural Resources
Gunpowder Falls State

Prepared by:

**Trail Facts
4 McCartney Road, Suite 200
New Freedom, PA 17349-9451
717-235-3517
carl@trailfacts.com
www.trailfacts.com**

TABLE OF CONTENTS

EXECUTIVE SUMMARY	4
HISTORIC PERSPECTIVE	6
LOCATION ANALYSIS	6
NCR TRAIL MAP	8
MARYLAND DEMOGRAPHICS	9
QUALITATIVE VALUES	10
SURVEY RESULTS	12
METHODOLOGY AND ANALYSIS	19
COMPARATIVE ANALYSIS 1994 AND 2004 SURVEYS	20
NORTHERN CENTRAL RAIL TRAIL USER ESTIMATES	33
ECONOMIC IMPACT	34
TRAIL MAINTENANCE, SECURITY AND CLEANLINESS	37
TRAIL USE BY GENDER	42
ANNUAL USAGE FEE	43
TALE OF TWO TRAILS – COMPARISON OF 2004 USER STUDIES THE NCR TRAIL – MD, HERITAGE RAIL TRAIL - PA	44

EXECUTIVE SUMMARY

The NCR Trail has been fully opened over its 20 mile length for 20 years. “The Trail”, as it is commonly referred to runs from Ashland, Maryland to the Mason Dixon line (Maryland/Pennsylvania border). Along the route, the trail passes through the heart of northern Baltimore County’s forests, rich farmland and historic villages.

An Analysis of the Economic Impacts of the Northern Central Rail Trail was conducted in 1994 by PKF Consulting for the Maryland Greenways Commission, Maryland Department of Natural Resources. Three surveys were administered throughout the course of this investigation: one for trail users, one for nearby property owners, and a third for businesses in the region that may be impacted by the presence of the trail. Surveys of trail users were distributed directly on the trail or via intercepts at parking facilities located along the trail.

During the summer of 2004 a follow-up study was conducted. This study utilized many of the same questions and the same methodology as the original 1994 survey. Like the original study, the 2004 survey was designed to monitor user characteristics and determine the economic impact of the NCR Trail. It also enables a comparative analysis with the 1994 survey to measure any changes in usage behavior.

Survey forms were available at all parking lots of the NCR Trail and several retailers who cater to trail users. Completed responses were placed in collection boxes or mailed to the Gunpowder Falls State Park office. Survey data was also collected with the assistance of “Friends of the Trail” volunteers and DNR personnel by “intercepting” trail users at various parking facilities. In all, 767 completed survey forms are included in this study.

While the majority of trail users reside in Maryland (89.5%), the trail has attracted users from Pennsylvania (7.1%), Virginia(0.39%), Washington, DC (1.05%), Delaware (0.26%). Riders from Florida, Colorado and Oregon completed survey forms as well. More than 28% of the trail users traveled more than 20 miles to reach the trail.

Most frequent usage is a couple of times a month or two times a week or a few times during the year. More than 40% of the respondents reported that they were on the trail at least once a week. More than 82% 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 (54.6.0%) somewhat more frequently than women (45.4%).

Biking is the predominant form of recreation on the rail trail. Over 60% 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 40% of the users spend at least two hours on the trail during an outing. Another 45.3% spend between one and two hours.

The section of the trail that receives the highest usage is between Paper Mill Road and Monkton (50.3%). The section of the trail that is least utilized is from Parkton to the Pennsylvania state line (22%). Morning is the most popular time of day to hit the trail for over 40% of the users. Weekends are more popular for getting on the trail than weekdays.

Respondent's knowledge of the trail came primarily from "word of mouth". Driving by the trail was the second most important source of information. The Rails-to-Trail Conservancy, a national organization that promotes the development of rail trails, was the third most important source of information for the users of the NCR Trail. Less than 6.5% of the users indicated that they found out about the trail from the Maryland Department of Natural Resources.

In terms of economic impact, 82% of the respondents indicated they had purchased "hard goods" (bikes, bike accessories, clothing, etc.) 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 \$333.12. 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.). 62% of the respondents indicated that they purchased these types of items on their most recent trail outing. The average purchase amount per person was \$9.14. 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 economy of northern Baltimore County. And, these types of purchases are recurring year after year.

More than 57% of the respondents to this survey stated that the maintenance of the trail was excellent. More than 90% felt that safety and security along the trail was good to excellent. Over 65% of respondents felt the cleanliness of the trail environment was excellent. Only 9.33% of the survey respondents felt that the presence of park rangers along the trail wasn't important.

When asked if they would be willing to pay an annual "user fee" to help maintain the NCR Trail, nearly 64% responded that they would.

In summary, the NCR Trail is an asset for Baltimore County and the State of Maryland. It is a venue that enhances the quality of life for thousands of Marylanders. And, it makes a significant contribution to the state's economy.

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 Maryland communities such as Sparks, Monkton and Parkton. 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 railroad carried Union troops during the Civil War, and President Abraham Lincoln traveled over this line to deliver the Gettysburg Address.

Following the declaration of bankruptcy of the Penn Central Railroad in 1970 and major destruction along the rail line in 1972 by Hurricane Agnes, the Maryland Department of Natural Resources purchased the right-of-way and converted it into a multi-use trail for hiking biking, jogging and horseback riding. The trail officially opened in 1984.

LOCATIONAL ANALYSIS

Built along the abandoned Northern Central Railroad right-of-way, the NCR Trail has become one of the most popular recreational trails in Maryland. The terrain is relatively flat and the surface is a firm crushed stone making it excellent for bicycling, hiking, running, horseback riding, as well as winter sports, such as cross country skiing and snow shoeing.

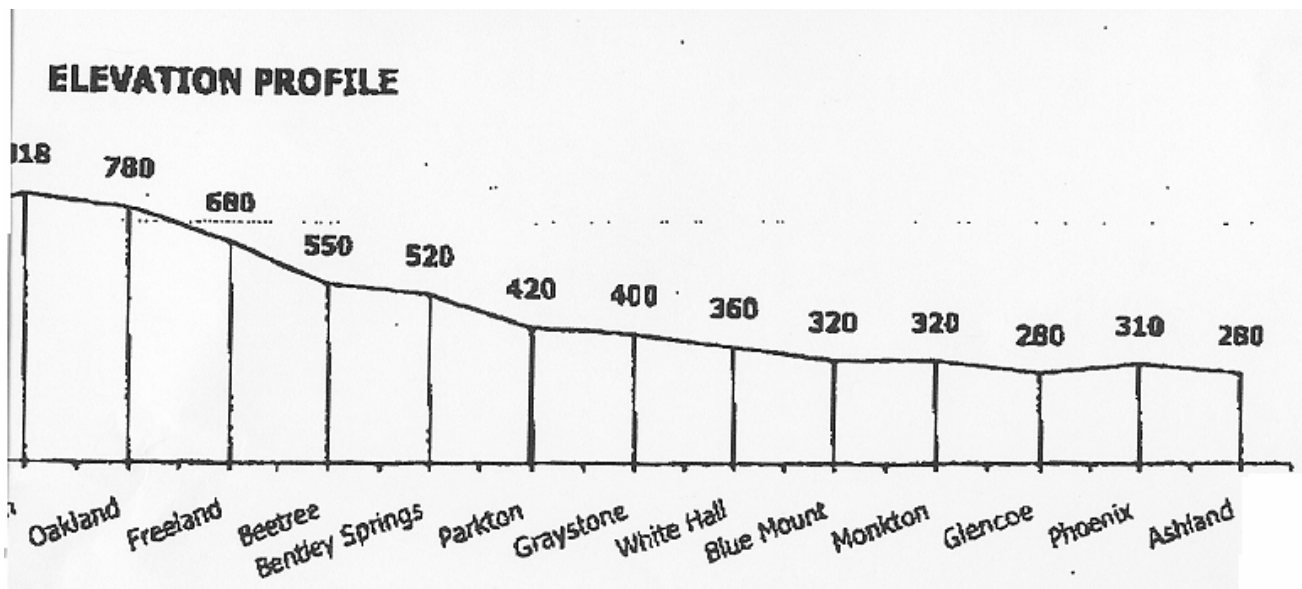
The trail parallels the Gunpowder Falls for most of its length running through the Gunpowder Falls State Park. The Gunpowder Falls is a stream that provides additional recreational opportunities for fishing, it is stocked with trout, canoeing and kayaking.

Facilities along the trail include benches, picnic tables and portable toilets. Communities along the trail offer more extensive facilities. There is a bike rental shop in Monkton and refreshments can be purchased from small shops in most villages along the route.

For the most part, the NCR trail passes through woodlands and rural countryside. There are a few road crossings but with the exception of Paper Mill Road at the southern end of the trail and Monkton Road at the mid-point, all are lightly used by vehicular traffic

The trail is marked with wooden mile markers which begin in Ashland at the southern end of the trail and end at the Pennsylvania line. Also along the way are white and black iron mile markers which mark distances along the original rail line.

The grade moving from south to north is slightly up hill. The elevation at Ashland is 280 feet rising to 680 feet at Freeland. A profile of the trail can be found below.



Trail Distances from Ashland

Landmark	Miles
Ashland	0.0
Paper Mill Road	0.5
Phoenix	2.0
Sparks	3.5
Glencoe	4.5
Monkton	7.0
White Hall	11.0
Parkton	12.5
Bentley Springs	16.0
Freeland	19.0
Pennsylvania State Line	20.0

Trailhead parking lots are provided at Paper Mill Road, Phoenix Road, Glencoe Road (Sparks), Monkton Road, White Hall, Parkton, Bentley Springs Road and Freeland Road.

A map of the NCR Trail is provided on the following page.

At the Pennsylvania state line, the NCR Trail joins the Heritage Rail Trail County Park managed by the York County Department of Parks and Recreation. This trail continues another 21 miles from the Maryland-Pennsylvania line (the famous Mason-Dixon Line) to the City of York. Similar in charter to the NCR Trail, the Heritage Rail Trail provides a crushed stone surface and accommodates non-motorized multi-use activities identical to the NCR Trail. New Freedom, 1.5 miles north, is the highpoint of the trail. It is all downhill from there descending from 818 feet to 400 when it reaches York.



BALTIMORE REGION DEMOGRAPHICS

The Baltimore Region of Maryland is comprised of the city of Baltimore and the following counties; Anne Arundel, Baltimore, Carroll, Harford and Howard.

Baltimore Region Demographic Profile* **2000 Census**

Population	2,512,431
Median Household Income	\$49,817
Households	958,756
Persons per household	2.62

Population Growth*

	1990	2000	2010
Baltimore Region	2,348,219	2,512,431	2,697,000

Greater Baltimore Tourism Dollars and Employment**

Total Tourism Expenditures	\$2,800,000,000
Tourism Related Employment	43,995

*Source: Baltimore Metropolitan Council

**Source: Greater Baltimore Committee

QUALITATIVE VALUES OF THE NCR TRAIL

The best way to evaluate the qualitative values of the NCR Trail is to let the trail users describe how they feel about the trail. The following are verbatim comments that were taken from the 2004 Trail User Survey forms.

“Thanks for such a wonderful trail.”

“Don’t commercialize the trail leave it as it is please!!!”

“I feel so lucky to live relatively close by.”

“I have been using the trail for 17 years. It is my base of solitude.”

“The trail is a fabulous resource. I feel very lucky to have it.”

“I left Inner Harbor, moved to Phoenix with trail as priority! I can not thank you enough for such a special trail.”

“Good trail!”

“This is a jewel in Baltimore County!”

“Post storm maintenance has been fabulous!”

“NCR Trail is a real asset – beautiful scenery, long enough for a full day ride.”

“We thoroughly enjoyed our ride from Ashland to New Freedom and back. My riding partner and I are riding various rail trails and yours is a good one.”

“I love the trail. It is one of Maryland’s greatest assets.”

“I have lived here and have been using the trail for 15 years. It is without question one of the County’s greatest resources along with the Gunpowder Falls.”

“Awesome – would like to retire to and live near the trail!”

“The Ranger in the Sparks Nature Center is worth his weight in gold!”

“Love the trail. Great.”

“Thank you for this treasure!”

“I use your trail because it is close, clean and paddle-able. During paddling I note wildlife in sight. I run back to the boat put-in for leg exercise.”

“I work in Cockeysville and often go to the trail at lunch for some quiet and a short walk.”

“Love the nature center.”

“I have used the trail since it opened.”

“The NCR is a great place to spend your day!! Beautiful and relaxing. Thank you.”

“Been using the trail for 8 years – it is a true treasure.”

“Nature Center at Sparks is exceptionally good. Brought grandchildren.”

“the Park staff is always pleasant and helpful.”

“We are fortunate to have this trail.”

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

Baltimore Road Runners

Kidney Foundation

Baltimore Bicycling Club

Maryland National Guard

Boy Scouts of America

Rosedale Center School

Sierra Club

Maryland Mountain Club

Crop Walk Club

The Park School

Trout Unlimited

Baltimore Walking Club

Maryland Ornithological Society

Baltimore County Public Schools

Towson State University

Maryland Athletic Club

Greater Baltimore Canoe Club

2004 SURVEY RESULTS

Question 1.

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

5.12%	Adjacent to the Trail
22.70%	1 - 5 miles from the Trail
43.96%	6 - 20 miles from the Trail
28.22%	Greater than 20 miles from the Trail

Question 2.

What is your ZIP Code?

89.49%	Maryland
7.10%	Pennsylvania
1.05%	District of Columbia
0.39%	Virginia
0.26%	Delaware
0.26%	Florida
0.26%	New York
1.18%	All other areas

Question 3.

How did you get to the trail on your most recent visit?

85.41%	Drive
8.94%	Bike
3.81%	Walk
1.45%	Run/Jog
0.39%	Horseback

Question 4.

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

2.21%	Daily
13.15%	Between 3 and 5 times a week
15.63%	1 or 2 times a week
9.38%	Once a week
19.66%	A couple of times a month
4.56%	Once a month
26.30%	Few times a year
7.81%	First time
1.30%	Never

Question 5

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

25.88%	Use the Trail alone
41.61%	One other person
23.28%	2 - 3 other people
5.85%	4 or 5 other people
2.99%	More than 5 other people
0.39%	Varies

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

Questions 7.

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

17.18%	Walking/hiking
61.81%	Biking
14.32%	Jogging/running
0.72%	Horseback riding
2.39%	Walking your dog or pet
0.84%	Cross country skiing
0.48%	Snowshoeing
2.27%	Other

Question 8.

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

36.45%	Weekdays
56.34%	Weekends
7.21%	Both

Question 9

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

43.49%	Morning
30.59%	Afternoon
11.67%	Evenings
14.25%	Anytime

Question 10.

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

0.92%	Less than 30 minutes
13.78%	30 minutes to 1 hour
45.28%	1 to 2 hours
40.03%	More than 2 hours

Question 11

Would you consider your main use of the trail to be for...

38.70%	Recreation
48.83%	Health and Exercise
0.78%	Commuting
1.73%	Fishing Access
2.51%	Boating/Tubing Access
5.54%	Fitness Training
1.90%	Other

Question 12.

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

15.49%	Paper Mill Road to Phoenix
16.00%	Phoenix to Sparks
18.83%	Sparks to Monkton
17.28%	Monkton to White Hall
10.42%	White Hall to Parkton
8.04%	Parkton to Bentley Springs
6.81%	Bentley Springs to Freeland
7.13%	Freeland to Pennsylvania Line

Question 13.

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

1.65%	Ashland
27.15%	Paper Mill
9.87%	Phoenix
12.16%	Sparks
19.47%	Monkton
9.78%	White Hall
6.95%	Parkton
3.84%	Bentley Springs
5.21%	Freeland
1.19%	Pennsylvania
2.74%	Other

Question 14.

Have you used the Heritage Rail Trail in Pennsylvania?

43.11%	Yes
56.89%	No

Question 15.

How did you find out about the Trail?

57.66%	Word of mouth
5.11%	Roadside signage
10.96%	Driving past
4.23%	Newspaper
6.48%	Maryland Department of Natural Resources
6.97%	Information from Rails to Trails Conservancy
3.86%	Internet web site
3.36%	Bike shop
1.37%	Tourist Information Center

Question 16.

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

24.77%	Bike
23.34%	Bike supplies
11.82%	Auto accessories (bike rack, etc.)
9.49%	Athletic shoes
10.84%	Clothing
1.51%	Fishing Gear
18.22%	Nothing

Question 17.

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 \$333.12

This average is influenced by the purchase of some very expensive bicycles costing as much as \$3,000 each.

Question 18.

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

29.39%	Bottled water/soft drinks
15.77%	Candy/snack foods
8.88%	Sandwiches
9.30%	Ice cream
6.95%	Lunch at a restaurant along the Trail
1.41%	Film
1.03%	Bike Rental
0.38%	Canoe Rental
1.31%	Tube Rental
28.08%	None of these

Question 19:

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 \$9.14.

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

Question 20.

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

Of the surveys completed 0.05% indicated that their trip involved an overnight stay. The following is a breakdown by type of accommodation for those overnight visits:

39.47%	Motel
7.89%	Hotel
10.53%	Bed and Breakfast
10.53%	Mill Pond Cottage
13.16%	Friend or Relatives Home
15.79%	Campground
2.63%	Other

Question 21.

Approximately how much did you spend per night on accommodations?

After excluding those who stayed with a relative or friend, the average cost per night was \$61.09. Prices ranged from \$5.00 per night at a campground to \$135 per night at a B & B.

Question 22.

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

57.43%	Excellent
36.34%	Good
4.91%	Fair
1.33%	Poor

Question 23.

How important is it to have park rangers patrolling the trail.

42.53%	Extremely
48.13%	Somewhat
9.33%	Not Important

Question 24.

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

44.93%	Excellent
47.47%	Good
5.60%	Fair
2.00%	Poor

Question 25.

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

65.08%	Excellent
31.08%	Good
3.04%	Fair
0.79%	Poor

Question 26.

Please rank these public benefits of the Trail with 1 being not important and 7 being extremely important

The figures below represent the average score for each of the benefits.

5.74	Preservation of open space
5.51	Health and fitness
5.42	Public recreation
3.66	Tourism and business development
4.71	Nature education
4.63	Access for disabled persons

3.25	Alternative transportation
4.54	Community pride

Question 27
What is your gender?

54.56%	Male
45.44%	Female

Question 28.
Would you be willing to pay an annual usage fee to help maintain the Trail?

63.98%	Yes
36.02%	No

METHODOLOGY AND ANALYSIS

The survey form was developed with input from the managers and staff of the Maryland Department of Natural Resources Gunpowder Falls State Park. The sample was collected using two methods. One 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 Gunpowder Falls State Park office. The other method was by intercepting trail users at the trailheads and requesting that they participate in the survey utilizing volunteers from the trail's "friends" group. Local merchants also participated in the distribution of survey forms. Survey collection was conducted from mid-May 2004 through the end of September 2004.

For the purpose of this analysis, 767 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 767 usable surveys.

The following analysis will utilize the 1994 survey data, where available, and the 2004 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. It must be noted that the methodologies used to collect the data differed between the two studies. Also the wording of some of the questions is not directly comparable. In some cases, categories of responses have been combined to provide a reasonable comparison.

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

COMPARATIVE ANALYSIS 1994 AND 2004 SURVEYS

Question 1.

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

1999		2004
4.21%	Adjacent to the Trail	5.12%
20.75%	Less than 1 mile	Not available
49.93%	1 -5 miles from the Trail	22.70%
25.11%	Greater than 6 miles	72.18%

The significant change in the distance that users travel to get to the trail is that those surveyed in 2004 were more willing to travel a greater distance in order to enjoy the benefits that the trail provides. This is further evidenced by users that came from as far way as Oregon, Florida, New Hampshire and New York.

Some of this change may also be attributed to the differences in data collection methodology between the 1994 study and the 2004 study.

Question 2.

What is your ZIP Code?

1994		2004
97.44%	Maryland	89.49%
2.56%	Pennsylvania	7.10%
0.00%	District of Columbia	1.05%
0.00%	Virginia	0.39%
0.00%	Delaware	0.26%
0.00%	Florida	0.26%
0.00%	New York	0.26%
0.00%	All other areas	1.18%

In the 1994 survey, 184 “Trail Users” completed the survey. Of these 156 provide their zip code. Only 4 of the trail users were not from Maryland. The four were from Pennsylvania, three from New Freedom and one from York. Again, part of the variation can be contributed to the difference in data collection methodology.

More importantly, it must be kept in mind that the Heritage Rail Trail in Pennsylvania had only completed the first mile from the borough of New Freedom to the Maryland state line at the time that the 1994 NCR Trail study was conducted.

Question 3.

How did you get to the trail on your most recent visit?

1994		2004
71.43%	Drive	85.41%
14.13%	Bike	8.94%
12.90%	Walk	3.81%
Not available	Run/Jog	1.45%
1.54%	Horseback	0.39%

In the 1994 survey a large number of “adjacent property owners” were interviewed. They are included in the above percentages (there is not a separate breakout for the trail user segment of the study). The way the vast majority of trail users get to a trail head is by automobile. Adequate parking, especially at Monkton, is still an on-going problem for the management of the NCR Trail. Even the large parking lot on Paper Mill Road is inadequate on some weekends.

Question 4.

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

1994		2004
7.41%	Daily	2.21%
19.58%	Between 3 and 5 times a week	13.15%
27.51%	1-3 times a week	Not available
Not available	1 or 2 times a week	15.63%
24.87%	Once a week	9.38%
Not available	A couple of times a month	19.66%
20.63%	Once a month	4.56%
Not available	Few times a year	19.63%
Not available	First time	14.33%
Not available	Average Trips Per Year	7.4

From this comparison it would appear that the 1994 survey respondents were much more frequent users of the NCR Trail than users are today. The methodology under which the data was collected may account for some of the differences. It must also be remembered that 1994 was very early in the trails movement and those who were users of the NCR Trail in those days were pioneers in a way. Lifestyles in 2004 are also probably different than they were a decade ago. Longer work hours, more family commitments, reduction in leisure time.

Question 5.

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

1994

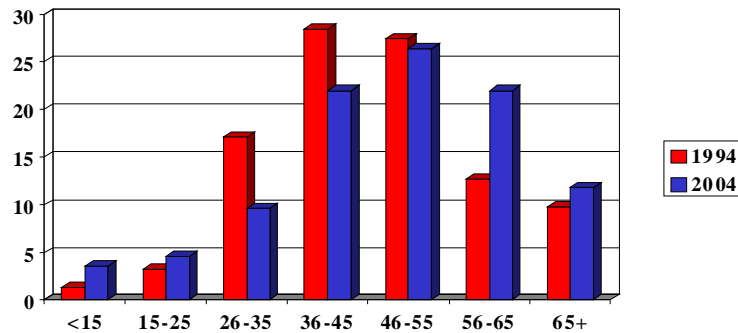
2004

3.3 people per group

2.1 average per group

There is a significant difference here between the 1994 data and the new survey. The 2.1 per person average group size is reasonable considering that more than 66% of the respondents stated they either used the trail alone or with one other person. Many times the trail is used by an individual before or after work in the Hunt Valley area. The 25.88% of respondents that state that they use the NCR Trail alone is considerably higher than the 20% single users on the Heritage Rail Trail in Pennsylvania.

PLEASE IDENTIFY YOUR GROUP.



Question 6.

Please identify your age group. (Check one)

1994

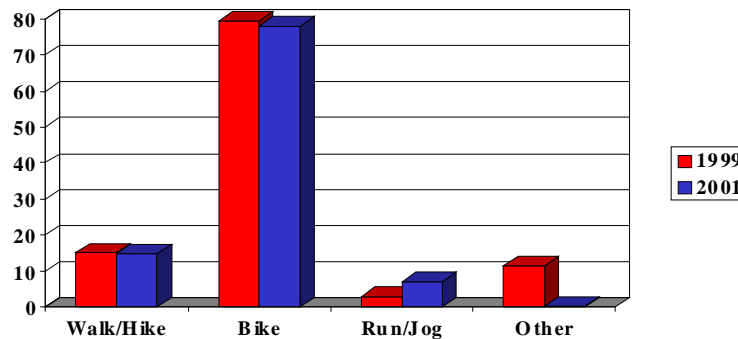
2004

1.35%	under 15	3.56%
3.21%	16 to 25	4.57%
17.09%	26 – 35	9.66%
28.34%	36 – 45	21.98%
27.41%	46-55	26.43%
12.69%	56-65	21.98%
9.81	66 or older	11.82%

In both studies, the vast majority of trail users are over the age of 35. This demographic is also true for other trail user studies conducted across the country. Of particular interest is the nearly

10% increase in the respondents in the 56-65 age category. This may have to do with older citizens being more active than they were a decade ago. The percentage in the 46-55 age category has remained nearly constant over the decade. Usage by those between 26 and 35 has decreased significantly. Again, this may be due to lifestyle changes with longer hours at work and kids to cart off to soccer games and lacrosse practice.

WHAT IS YOUR PRIMARY ACTIVITY ON THE TRAIL?



Questions 7.

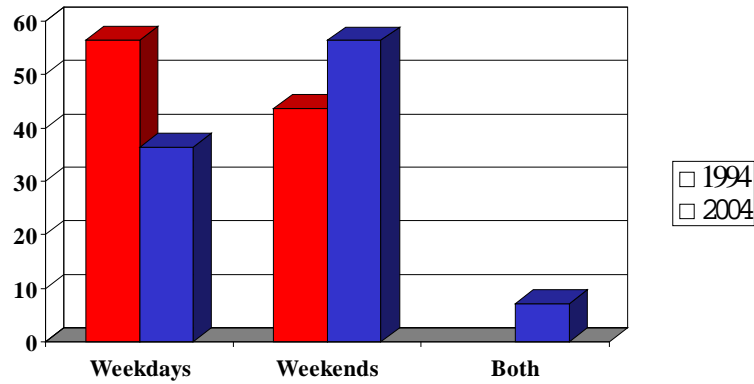
What is your primary activity on the Trail? (Check one)

1994		2004
46.55%	Walking/hiking	17.18%
40.86%	Biking	61.81%
10.34%	Jogging/running	14.32%
0.52%	Horseback riding	0.72%
0.17%	Commuting	Not available
0.34%	Picnicking	Not available
1.03%	Fishing	Not available
Not available	Walking dog or pet	2.39%
0.17%	Cross country skiing	0.84%
Not available	Snow shoeing	0.48%
Not available	Other	2.27%

From the 1994 study there has been a significant shift from walking and hiking to cycling. As has been stated previously, part of this change can be attributed to a change in the data collection methodology. The 1994 study took a large sample of “adjacent” property owners. This group would be more likely to walk on the trail due to close proximity. Also, cycling as a sport, has seen significant growth over the past decade. According to research conducted by the *Bicycle Dealers Association* “Enthusiast riders tripled in number during the 1990s and about 24.6 million U.S. adults own a bicycle they bought new.” And, according to the *National Sporting Goods*

Association 41.4 million Americans age seven and older were estimated to have ridden a bicycle six times or more in 2002 (the most recent data available).

GENERALLY, WHEN DO YOU USE THE TRAIL?



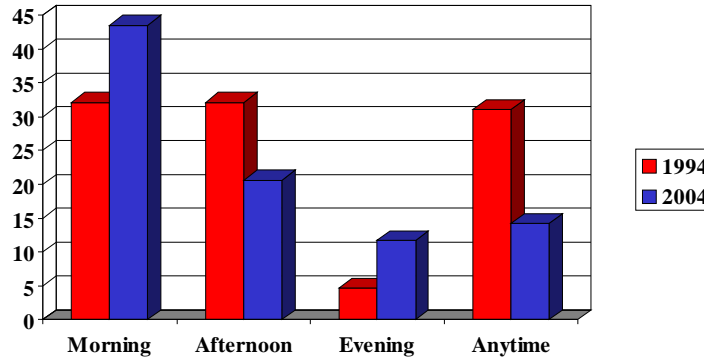
Question 8.

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

1994		2004
56.37%	Weekdays	36.45%
43.63%	Weekends	56.34%
Not available	Both	7.21%

The weekday and weekend usage of the NCR Trail have reversed over the past decade. Some of this shift may be a result of differences in data collection methodology. But as stated previously, changes in lifestyle may contribute to less time for exercise and recreation during the work week.

WHAT TIME OF DAY DO YOU GENERALLY USE THE TRAIL?



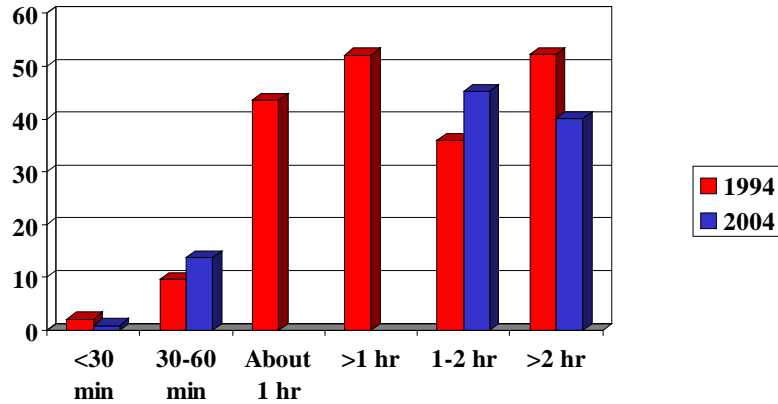
Question 9.

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

1994		2004
32.12%	Morning	43.49%
32.12%	Afternoon	30.59%
4.69%	Evenings	11.67
31.08%	Anytime	14.25%

Respondents to the 2004 survey were more likely to use the trail in the morning and evening than those in 1994. The 1994 respondents were much more likely to respond to this question with an anytime response. The data collection for the 2004 study was from May until the end of September. During the summer months more trail users may have sought the relative coolness of the morning for their trail excursion. The time of year that the 1994 survey was conducted is not available from the methodology section of that report.

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



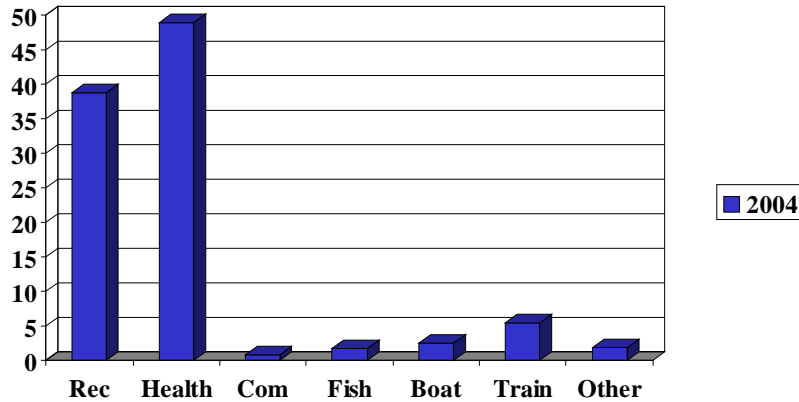
Question 10.

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

1994		2004
4.39%	Less than 30 minutes	0.92%
Not available	30 minutes to 1 hour	13.78%
43.51%	About an hour	Not available
52.10%	More than an hour	Not available
Not available	1 to 2 hours	45.287%
Not available	More than 2 hours	40.03%

Over 85% of the 2004 respondents spend more than an hour on the trail each time they make a trip. While the data is not directly comparable to the 1994 study, it appears that an hour or more was the norm for most users even a decade before. Considering that most users drive some distance to arrive at a trailhead points to a trail experience as a planned destination where the time on the trail needs to exceed the time it took to get there.

WOULD YOU CONSIDER YOUR USE OF THE TRAIL TO BE



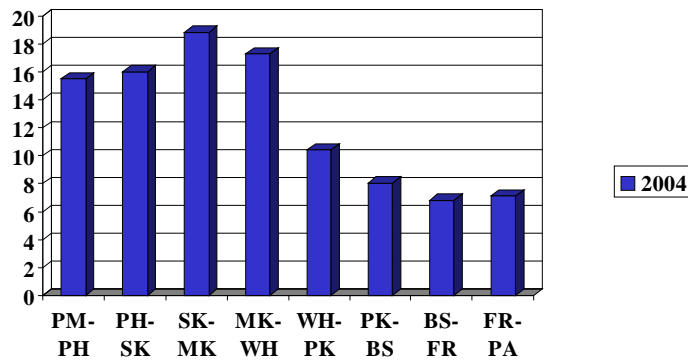
Question 11

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

	<u>2004</u>
Recreation	38.70%
Health and Exercise	48.83%
Commuting	0.78%
Fishing Access	1.73%
Boating/Tubing Access	2.51%
Fitness Training	5.54%
Other	1.90%

There is no comparable data for this question from the 1994 study. While much of the literature regarding rail trails refers to them as “recreational corridors” from the results of this survey more users consider “health and fitness” as the primary reason they are on the trail. The use of the NCR Trail by older citizens (Question 6) is another indicator that a walk or ride on the trail is more than a recreational experience for many users.

WHAT PORTION OF THE TRAIL DO YOU USE MOST OFTEN?



Key to chart above:

PM = Paper Mill Road	PH = Phoenix	SK = Sparks
MK = Monkton	WH = White Hall	PK = Parkton
BS = Bentley Springs	FR = Freeland Road	PA = Pennsylvania Line

Question 12.

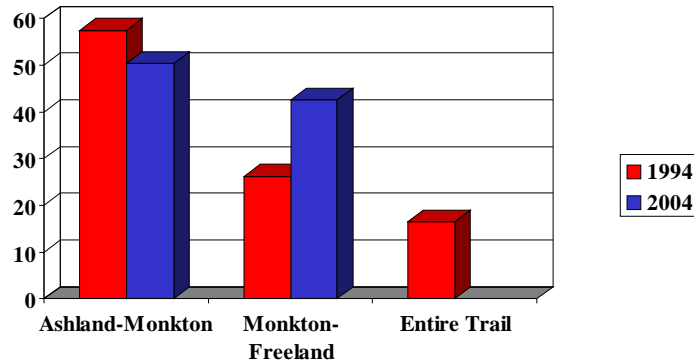
What portion of the Trail do you use most often? (check all that apply)

	2004
Paper Mill Road to Phoenix	15.49%
Phoenix to Sparks	16.00%
Sparks to Monkton	18.83%
Monkton to White Hall	17.28%
White Hall to Parkton	10.42%
Parkton to Bentley Springs	8.04%
Bentley Springs to Freeland	6.81%
Freeland to Pennsylvania Line	7.13%

Usage of the NCR Trail south of White Hall is fairly consistent over all sections. Usage of the northern end of the trail, from White Hall to the Pennsylvania line is considerably less. In part this can be attributed to the distance that a trail user must drive to get to the northern section. It takes more time to reach these sections from the southern trailheads and only cyclists or distance runners could cover the mileage in a typical outing to reach some of the northern sections. Communicating the less crowded nature of the northern portion of the trail may be a benefit that some users would want to take advantage of, even if it does entail additional travel time.

The 1994 survey collapsed the portions of the trail into three categories: Ashland to Monkton, Monkton to Freeland and Entire length. In order to make a comparison, the 2004 data has been collapsed in a similar manner. The results are seen in the chart and table below.

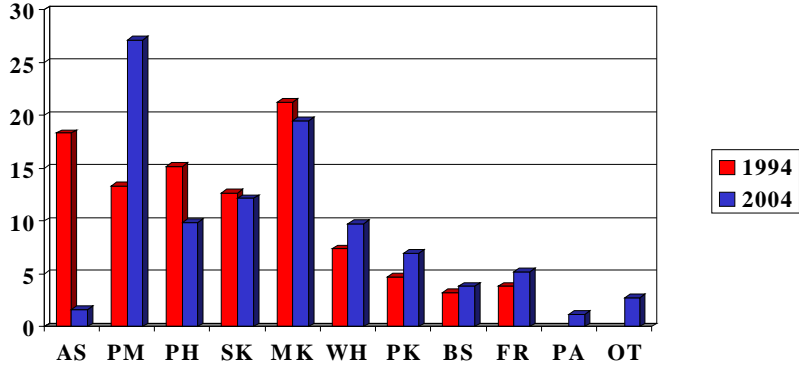
WHAT PORTION OF THE TRAIL DO YOU USE MOST OFTEN?



1994		2004
57.34%	Ashland to Monkton	50.32%
26.22%	Monkton to Freeland	42.55%
16.43%	Entire length	Not available

It would appear that over the past decade, more NCR trail users have migrated to the northern end of the trail. In part this may be attributed to the over crowding on the southern end of the trail. It may also be a result of the opening of the Heritage Rail Trail in Pennsylvania. Use of one of the northern NCR trailheads would enable someone to venture into Pennsylvania on the Heritage Rail Trail. From Question 14 we know that 43% of NCR Trail users have been on the Heritage Rail Trail in Pennsylvania.

WHICH PARKING LOT DO YOU GENERALLY USE WHEN YOU VISIT THE TRAIL?



Key to chart above:

AS = Ashland	PM = Paper Mill Road	PH = Phoenix
SK = Sparks	MK = Monkton	WH = White Hall
PK = Parkton	BS = Bentley Springs	FR = Freeland Road
PA = Pennsylvania	OT = Other	

Question 13.

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

1994		2004
18.32%	Ashland	1.65%
13.29%	Paper Mill	27.15%
15.21%	Phoenix	9.87%
12.70%	Sparks	12.16%
21.27%	Monkton	19.47%
7.39%	White Hall	9.78%
4.73%	Parkton	6.95%
3.25%	Bentley Springs	3.84%
3.84%	Freeland	5.21%
Not available	Pennsylvania	1.19%
Not available	Other	2.74%

Due to the development of a parking facility on Paper Mill Road and the incomplete Heritage Rail Trail in Pennsylvania it is difficult to make a comparison between the two studies. In 1994 parking for trail access at Paper Mill Road was along the shoulders of the road, a dangerous situation to say the least. It would appear that the development of the Paper Mill Road trailhead, relieved the pressure on the Ashland and Monkton facilities. Utilization of some of the northern trailhead parking facilities has increased slightly.

Question 14.

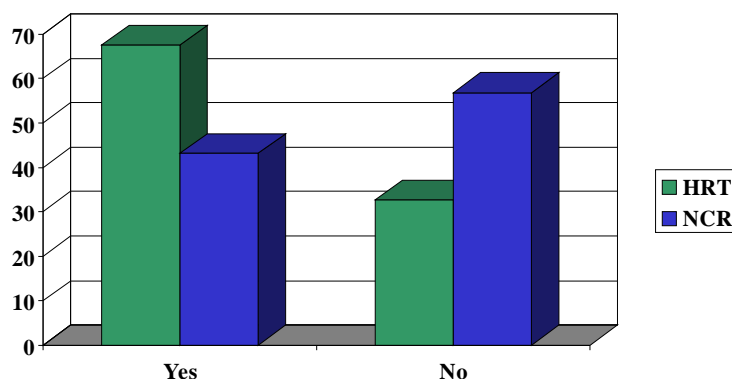
Have you used the Heritage Rail Trail in Pennsylvania?

	2004
Yes	43.11%
No	56.89%

There is no comparable data for this question because only the first mile of the Heritage Rail Trail (from the Maryland line to New Freedom) was completed in 1994.

The chart below compares the usage of the Heritage Rail Trail (HRT) by NCR Trail users with the usage of the NCR Trail by Heritage Rail Trail users (this data is from a user study conducted on the Heritage Rail Trail during the same time period during the summer of 2004).

COMPARISON OF CROSS TRAIL USAGE



A significantly higher percentage of Heritage Rail Trail users also use the NCR Trail than NCR Trail users venture into Pennsylvania. This may be attributed to two factors. One is that NCR Trail users favor the southern trailheads and it is a 15 to 20 mile trip one way to get to the Heritage Rail Trail. Secondly, the Heritage Rail Trail was developed from the Maryland line north. Trail users had to drive to southern York County to access the trail. For a good two hour bike ride they had to head south into Maryland. Many still take the ride south.

Question 15.

How did you find out about the Trail?

1994		2004
72.30%	Word of mouth	57.66%
Not Available	Roadside signage	5.11%
14.57%	Driving past	10.96%
9.17%	Newspaper	4.23%
3.96%	Road map	Not available
Not available	Maryland Department of Natural Resources	6.48%
Not available	Information from Rails to Trails Conservancy	6.97%
Not available	Internet web site	3.86%
Not available	Bike shop	3.36%
Not available	Tourist Information Center	1.37%

Word of month is the single greatest source of information regarding the NCR Trail just as it was a decade ago. Newspaper has slipped a bit as a source of information but that is probably due to the fact that the NCR Trail is a mature facility and doesn't get as much press now as it did in the late 1980's and early 1990's. The past decade has seen a significant change in the way people can gather information. The internet, which was in its infancy in 1994, now provides a wealth of information on recreational opportunities. Web sites have been created by Maryland's Department of Natural Resources that provide detailed information on the NCR Trail. The Rails-to-Trails Conservancy Trail Link site provides information on the NCR Trail as well.

The following are some of the web sites where NCR Trail information is available:

www.bikewashington.org/trails/ncr/ncr.htm

www.brokenclaw.com/biking/northern.html

www.dnr.state.md.us/greenways/ncrt_trail.html

www.brcc.com/ncr-s.html

www.trailink.com

www.baltimorestyle.com/ja02issue/rails-ja02.html

www.trailsfromrails.com/maryland.htm

www.commuterpage.com/biketrails.htm

www.citypaper.com/bob/story.asp?id=7929

www.bikestuff.net/ncr.htm

www.sherpaguides.com/chesapeake_bay/central_maryland/baltimore_county.html

NORTHERN CENTRAL RAIL TRAIL USER ESTIMATES

The Maryland Department of Natural Resources has been estimating the number of annual users on the NCR Trail since the trail opened. Few other trails across the country have such a robust history of trail user volume.

NORTHERN CENTRAL RAIL TRAIL USER ESTIMATES 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
2000	228,224
2001	247,877
2002	119,522**
2003	308,574
2004	867,725

* 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.

** The methodology did not change in 2002. Visitation simply did not receive priority attention, and as a result, it was left to one individual to estimate. The individual was given little instruction and there were no real standards to ensure consistency from one year to the next in how estimates were obtained.

In 2004, Maryland DNR set out to correct that, and have broadened the counting responsibility to a larger number of staff, so that one person is not responsible for an entire area of the park but rather collects those numbers from others and compiles a report. This smaller area of responsibility per employee makes the counts more reliable, as well as the addition of traffic counters at busy trail entrances.

ECONOMIC IMPACT

The economic impact of the NCR Trail 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.

Some trail users travel a great distance in order to sample the flavor of the NCR Trail. These visitors spend a night or two in local accommodations ranging from high-end bed and breakfast inns to campgrounds to the home of a friend or relative.

The trail has also fostered new business enterprises that have added employment in northern Baltimore County. From the bicycle rental businesses near the Paper Mill Road trailhead and in Monkton to numerous refreshment stands along its length, the trail has ignited an entrepreneurial spirit along its course.

Estimates of the overall economic impact of the NCR Trail are presented in the form of a table representing a range of annual usage estimates.

Hard Goods

Question 16.

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

1994		2004
31.81%	Bike	24.77%
24.25%	Bike supplies	23.34%
Not available	Auto accessories	11.28%
22.40%	Running/walking/hiking shoes	9.49%
14.12%	Clothing	10.84%
7.42%	Film	Not available
Not Available	Fishing gear	1.51%
Not available	Nothing	18.22%

Question 17.

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

1994		2004
\$203.00	Average hard goods purchase	\$333.12

This average is influenced by the purchase of some very expensive bicycles costing as much as \$3,000 each.

Soft Goods

Question 18.

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

	<u>2004</u>
Bottled water/soft drinks	29.39%
Candy/snack foods	15.77%
Sandwiches	6.38%
Ice cream	9.30%
Lunch at a restaurant along the Trail	6.95%
Film	1.41%
Bike Rental	1.03%
Canoe Rental	0.38%
Tube Rental	1.31%
None of these	28.08%

The percentage breakdown by type of spending was not published in the 1994 study report.

Question 19.

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

<u>1994</u>		<u>2004</u>
\$6.30	Average soft goods purchase	\$9.14

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

Overnight Accommodations

Question 20.

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

Of the surveys completed 0.05% indicated that their trip involved an overnight stay. The following is a breakdown by type of accommodation for those overnight visits:

	<u>2004</u>
Motel	39.47%
Hotel	7.89%
Bed and Breakfast	10.53%
Mill Pond Cottage	10.53%
Friend or Relatives Home	13.16%
Campground	15.79%
Other	2.63%

There is no comparable data from the 1994 study. Trail related tourism is increasing across the country. As more trails are developed and linked together overnight stays will increase.

Question 21.

Approximately how much did you spend per night on accommodations?

	2004
Average expenditure on overnight accommodations	\$61.09

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.

NCR Trail Economic Impact Analysis

					Annual Users		
					300,000	500,000	800,000
Category	% Usage	Avg. \$	Avg. Life	Avg. # of Trips			
Hard Goods*	81.78%	\$333.12	6 years	7.4	\$1,840,713	\$3,067,855	\$4,908,568
Soft Goods	71.92%	\$9.14			\$1,972,046	\$3,286,744	\$5,258,790
Overnight Accommodations	0.05%	\$61.09		7.4	\$ 12,383	\$ 20,639	\$ 33,022

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

In the above example the calculation would look like this:

$$((.8178 \times (\$333.12/6)) \times (300,000/7.4)) = \$1,840,713$$

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

In the above example the calculation would look like this:

$$(.7192 \times \$9.14 \times 300,000) = \$1,972,046$$

Overnight Accommodations = (% Usage X Users Avg. \$ X # Users/Avg. Number of Trips)

In the above example the calculation would look like this:

$$(.005 \times \$61.09 \times 300,000/7.4) = \$12,383$$

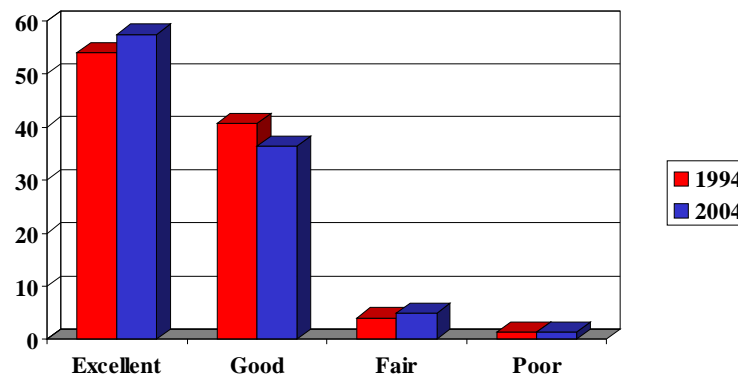
* Major hard good purchases such as a bike may be replaced every 5 to 10 years. Running shoes may be replaced every couple of months. For the purpose of this analysis it is assumed an average life of 6 years. To get a figure that is usable on an annual user basis, the hard goods needs to be broken down 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 1994 survey was conducted ten years after the NCR Trail was opened and established a benchmark for how users perceived the trail in terms of maintenance, security and cleanliness. The 2004 survey included these questions to provide feedback to the Maryland Department of Natural Resources on how they were doing, from a user's perspective, in keeping the facility up to the standards that the users expect.

How the NCR Trail is maintained has a significant impact on the economic contributions it makes to the northern Baltimore County.

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



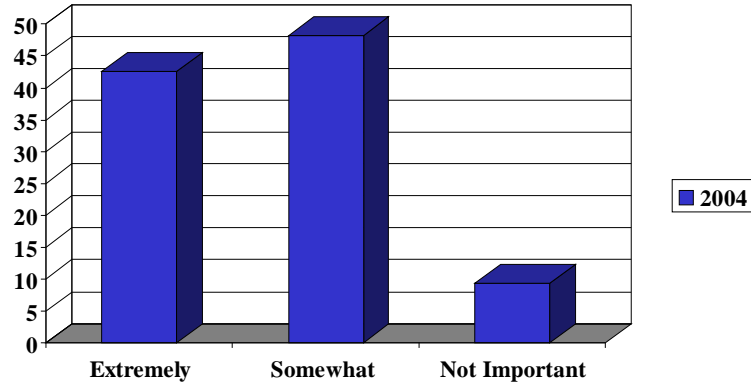
Question 22.

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

1994		2004
53.95%	Excellent	57.43%
40.62%	Good	36.34%
4.11%	Fair	4.91%
1.32%	Poor	1.33%

Over the past 10 years, the Maryland Department of Natural resources has done an excellent job of maintaining the NCR Trail. The number of users that rated trail maintenance as excellent has actually increased. This exceptional rating comes during a summer in which several major thunderstorms and hurricanes flooded parking lots and washed out sections of the trail. A well maintained trail adds to the enjoyment of the user experience, brings regular users back and attracts new users.

HOW IMPORTANT IS IT TO HAVE RANGERS PATROLLING THE TRAIL.



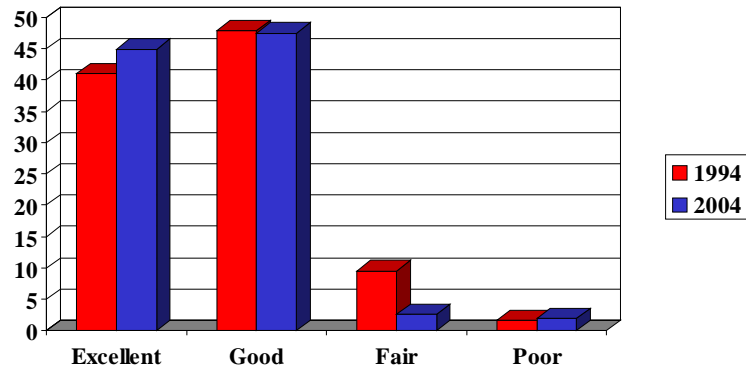
Question 23.

How important is it to have park rangers patrolling the trail.

	2004
Extremely	42.53%
Somewhat	48.13%
Not Important	9.33%

More than 90% of the survey respondents thought that it was extremely or somewhat important to have Maryland DNR rangers patrolling the trail. Women and older survey respondents were more likely to feel that it was extremely important to have ranger patrols.

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



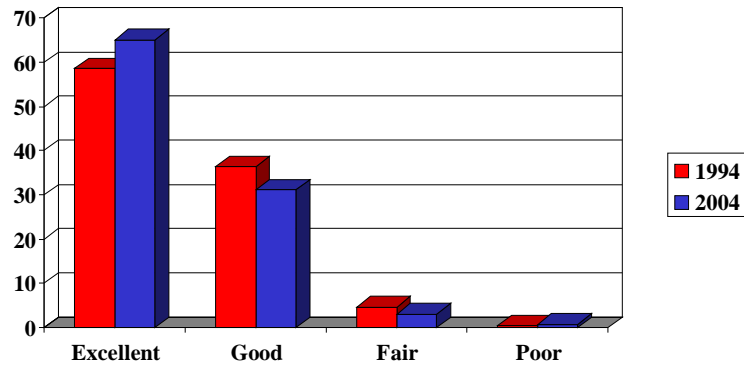
Question 24.

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

1994		2004
40.94%	Excellent	44.93%
47.82%	Good	47.47%
9.56%	Fair	5.60%
1.68%	Poor	2.00%

Over the past decade the safety and security of the NCR Trail has actually improved in the minds of the trail users surveyed. Two factors can contribute to the feeling of safety. One is the regular patrols by DNR rangers. The other is the fact that the more users a trail has the more secure all users feel. The old saying “there is strength in numbers” applies to helping prevent negative incidents along the trail.

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



Question 25.

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

1994		2004
58.54%	Excellent	65.08%
36.32%	Good	31.08%
4.64%	Fair	3.04%
0.50%	Poor	0.79%

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 trail 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.

The major complaint from the comments section of the survey forms was the horse manure on the trail (this same complaint is also the number one gripe on the Heritage Rail Trail in Pennsylvania).

Some survey respondents asked for the placement of more “trash cans”. The “pack out what you pack in” message should be more prominently explained.

Question 26.

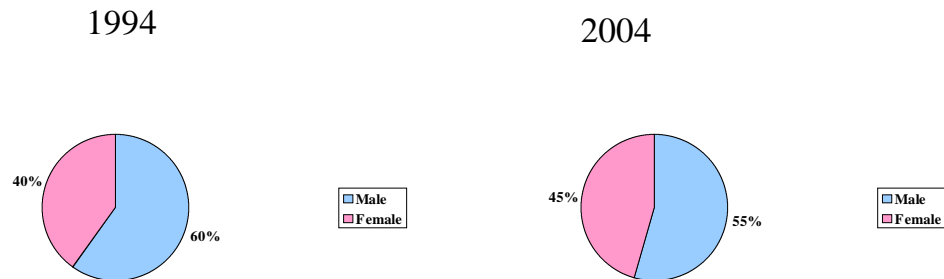
Please rank these public benefits of the Trail with 1 being not important and 7 being extremely important

The figures below represent the average score for each of the benefits.

	2004
Preservation of open space	5.74
Health and fitness	5.51
Public recreation	5.42
Tourism and business development	3.66
Nature education	4.71
Access for disabled persons	4.63
Alternative transportation	3.25
Community pride	4.54

There is no comparative data from the 1994 study. This question was included in an effort to determine the benefits that users associate with a facility such as the NCR trail and which of those benefits were most important to them. By a slight margin, the survey respondents feel that the NCR Trail helps to preserve open space. They also feel that the trail provides a venue to help improve their health and fitness levels. A source of public recreation is also a benefit that the survey respondents regarded highly. Due primarily to its location in a state park in northern Baltimore County not many respondents feel that the NCR Trail provides a viable transportation alternative (a trail along the Jones Falls running to downtown Baltimore may be more highly perceived as an alternative transportation route).

WHAT IS YOUR GENDER?

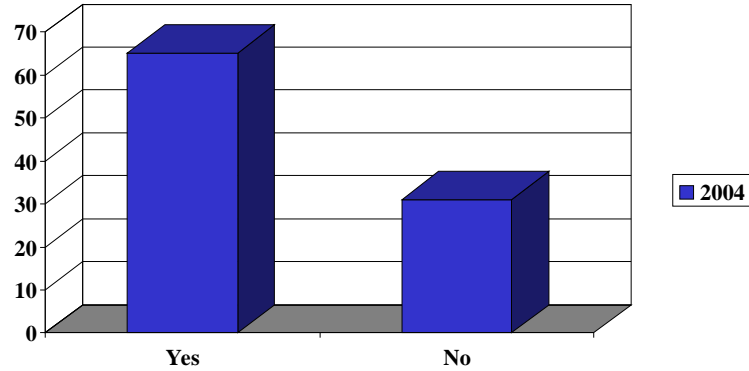


Question 27: What is your gender?

<u>1994</u>		<u>2004</u>
60.09%	Male	54.56%
39.91%	Female	45.44%

Slightly more men use the trail (or at least complete the survey forms) than women. There has been an increase in the percentage of female trail users that may be attributed to changes in lifestyle, a trail that offers a clean/secure environment and the increased emphasis of health.

WOULD YOU BE WILLING TO PAY AN
ANNUAL USAGE FEE TO HELP
MAINTAIN THE



Question 28.

Would you be willing to pay an annual usage fee to help maintain the Trail?

	<u>2004</u>
Yes	63.98%
No	36.02%

There is no comparable data from the 1994 study. From the user comments the fee needs to be small, under \$10.00. Most objections were voiced as...”that’s what I pay state taxes for”. Most users would be willing to pay a small fee. The questions are how to implement it and to what degree is it enforced. One suggestion is a small tag like a “dog license” that could be attached to the seat post of a bike, carried in a wallet or hung from a pack.

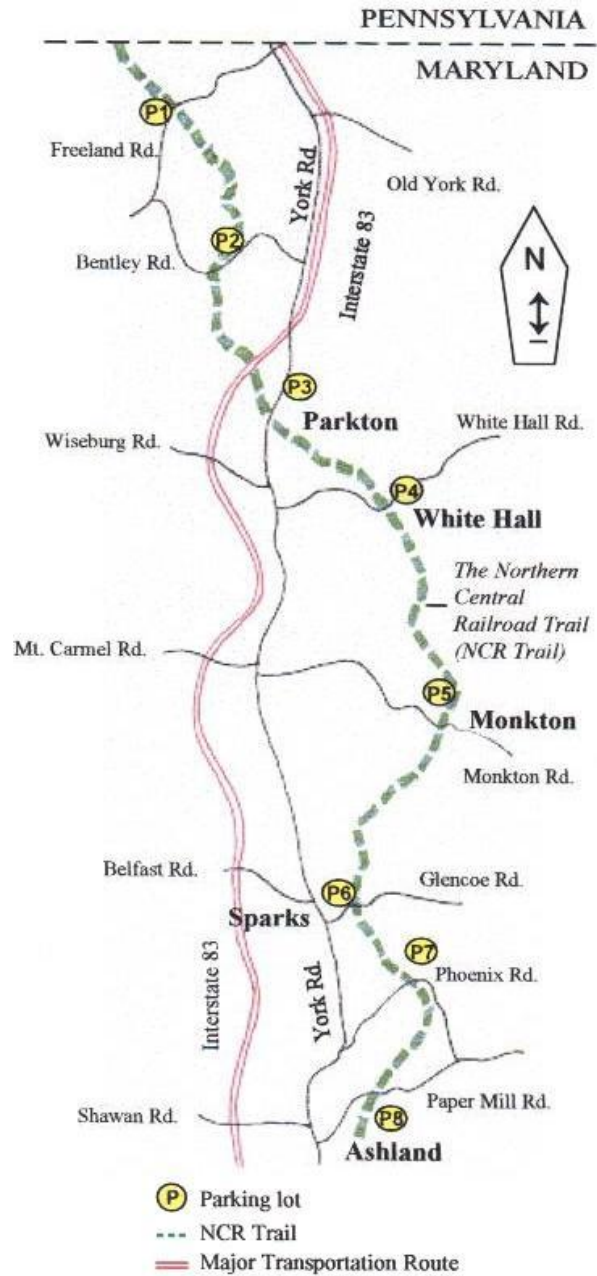
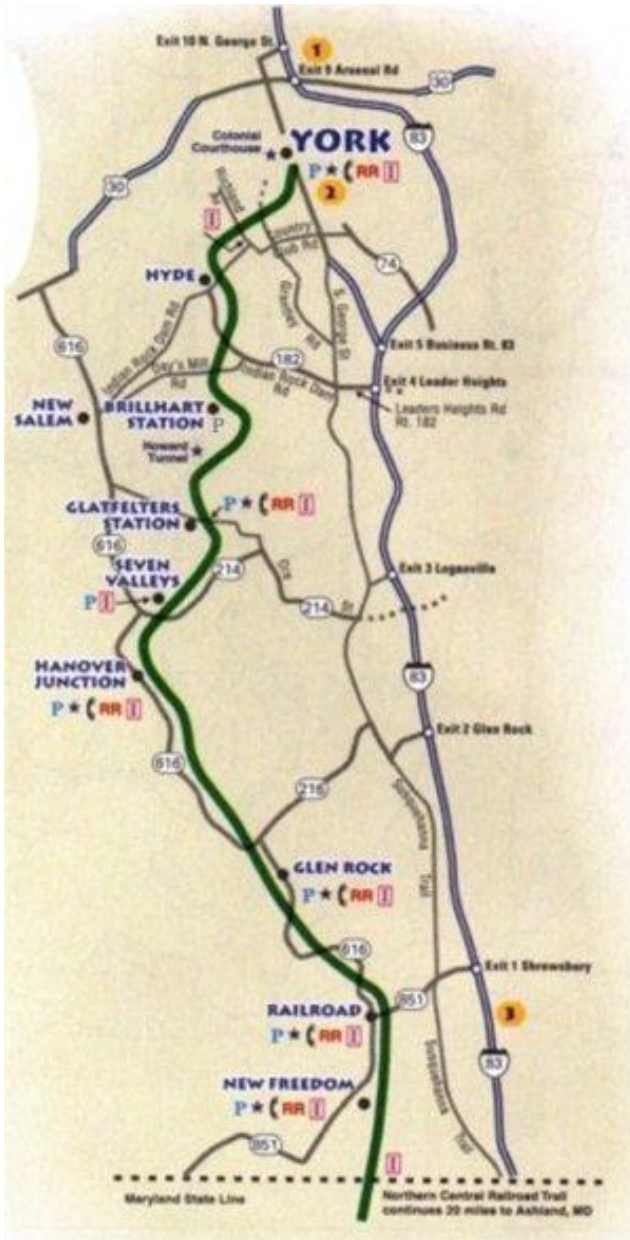
Tale of Two Trails

A Comparison of 2004 User Surveys on the
Maryland NCR Trail and the York County, PA
Heritage Rail Trail

Prepared for:
Maryland Department of Natural Resources
Gunpowder Falls State Park
and
York County Department of Parks and Recreation

Prepared by:
Trail Facts
4 McCartney Road
New Freedom, PA 17349-9451
717-235-3517
carl@trailfacts.com
www.trailfacts.com

The Trails



METHODOLOGY

During the spring and summer of 2004, user surveys were conducted on the Maryland Department of Natural Resources NCR Trail and the York County, PA Heritage Rail Trail County Park.

These two trails utilize the right of way of the former Northern Central Railroad (NCR). The trails connect at the state line between Freeland, Maryland and New Freedom, Pennsylvania. The Maryland trail, which consists of 20 miles, was opened in 1986. The Pennsylvania trail, which is 21 miles in length, was developed from south to north in phases and officially opened in August 1999.

The survey form was developed with input from the managers and staff of the Maryland Department of Natural Resources Gunpowder Falls State Park and the York County Department of Parks and Recreation. In many cases the questions in each survey were worded identically or were very similar in terms of the available responses. This was done so that the following comparison between the two trails would be possible.

The sample was collected using two methods. One 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 Gunpowder Falls State Park office or the York County Parks Department office. The other method was by intercepting trail users at the trailheads or trail museums and requesting that they participate in the survey utilizing volunteers from the trails' "friends" groups. Local merchants also participated in the distribution of survey forms. Survey collection was conducted from mid-May 2004 through the end of September 2004.

On the NCR Trail, 767 survey forms were completed. The average number of trips per user was calculated from the data to be 7.4. Maryland Department of Natural Resources estimates that there were more than 867,000 user visits to the NCR Trail in 2004. Dividing the estimated annual user visits by the average number of trips we can estimate a trail user population of 117,260.

On the Heritage Rail Trail, 445 survey forms were completed. The average number of trips per user was calculated from the data to be 7.97. York County Department of Parks and Recreation estimates that there are approximately 300,000 user visits annually to the Heritage Rail Trail County Park. Dividing the estimated annual user visits by the average number of trips we can estimate a trail user population of 37,641.

The following pages provide a "head-to-head" comparison of the data from the 2004 user studies on the NCR Trail and the Heritage Rail Trail. In some cases not all of the available responses were provided on each survey. In these cases, an "NA" will appear when a response was not included on one survey or the other.

SURVEY RESULTS COMPARISON

Question 1.

How far is your residence from the Trail?

<u>Heritage Rail Trail</u>		<u>NCR Trail</u>
4.05%	Adjacent to the Trail	5.12%
29.05%	1 -5 miles from the Trail	27.70%
32.21%	6 - 20 miles from the Trail	43.96%
34.68%	Greater than 20 miles from the Trail	28.22%

Question 2.

What is your ZIP Code?

<u>Heritage Rail Trail</u>		<u>NCR Trail</u>
61.73%	York County	
	Maryland	89.49%
	Pennsylvania	7.10%
20.05%	Maryland/Virginia/DC	
	DC/Virginia	1.44%
6.15%	Lancaster County	
4.33%	Harrisburg Metro	
2.28%	Philadelphia Metro	
5.37%	All other areas	1.96%

Question 3.

How did you get to the Trail on your most recent visit?

<u>Heritage Rail Trail</u>		<u>NCR Trail</u>
81.30%	Drive	85.41%
12.83%	Bike	8.94%
3.91%	Walk	3.81%
1.30%	Run	1.45%
0.65%	Horseback	0.39%

Question 4.

How often, on average, do you use the Trail?

<u>Heritage Rail Trail</u>		<u>NCR Trail</u>
2.04%	Daily	2.21%
14.29%	Between 3 and 5 times a week	13.15%
20.63%	1 or 2 times a week	15.63%
8.16%	Once a week	9.38%
17.69%	A couple of times a month	19.66%
5.44%	Once a month	4.56%
20.18%	Few times a year	26.30%
11.56%	First time	7.81%
0.00%	Never	1.30%
7.97	Average Trips per Year	7.40

Question 5.

How many people typically use the Trail with you?

Heritage Rail Trail		NCR Trail
20.35%	Use the Trail alone	25.88%
49.02%	One other person	41.61%
18.38%	2 - 3 other people	23.28%
8.75%	4 or 5 other people	5.85%
3.50%	More than 5 other people	2.99%
0.00 %	Varies	0.39%

Question 6.

Please identify your age group.

Heritage Rail Trail		NCR Trail
5.96%	under 15	3.56%
3.62%	16 to 25	4.57%
6.83%	26 – 35	9.66%
15.53%	36 – 45	21.98%
26.38%	46-55	26.43%
27.66%	56-65	21.98%
14.47%	66 or older	11.82%

Questions 7.

What is your primary activity on the Trail?

Heritage Rail Trail		NCR Trail
16.77%	Walking/hiking	17.18%
71.37%	Biking	61.81%
7.98%	Jogging/running	14.32%
1.02%	Horseback riding	0.72%
0.82%	Cross country skiing	0.84%
1.43%	Nature study	NA
NA	Walk pet	2.39%
NA	Snowshoe	0.48%
0.61%	Other	2.27%

Question 8.

Generally, when do you use the Trail?

Heritage Rail Trail		NCR Trail
42.73%	Weekdays	36.45%
48.64%	Weekends	56.39%
8.64%	Both weekdays and weekends	7.21%

Question 9.

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

<u>Heritage Rail Trail</u>		<u>NCR Trail</u>
38.61%	Morning	43.49%
31.86%	Afternoon	30.39%
12.66%	Evenings	11.67%
16.88%	Anytime	14.25%

Question 10.

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

<u>Heritage Rail Trail</u>		<u>NCR Trail</u>
0.22%	Less than 30 minutes	0.92%
10.49%	30 minutes to 1 hour	13.78%
40.63%	1 to 2 hours	45.28%
48.66%	More than 2 hours	40.03%

Question 11.

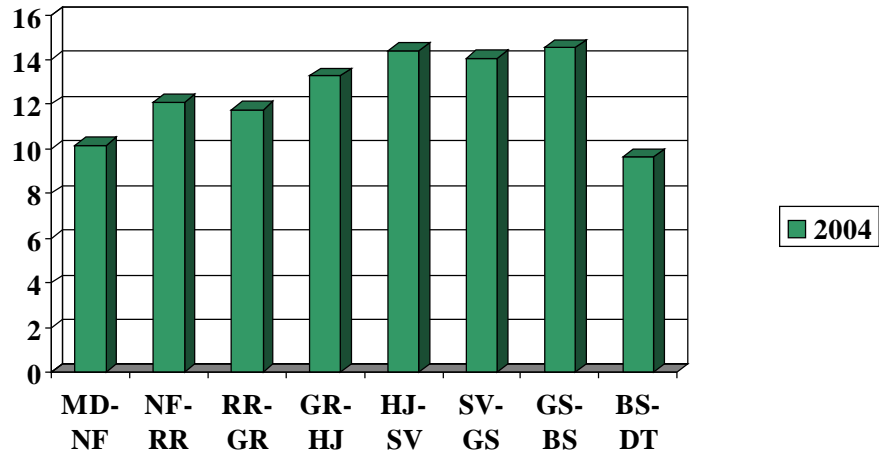
Would you consider your use of the trail to be primarily for?

<u>Heritage Rail Trail</u>		<u>NCR Trail</u>
40.38%	Recreation	38.70%
44.63%	Health and exercise	48.83%
1.00%	Commuting	0.78%
11.13%	Fitness training	5.54%
2.88%	Other	1.90%
NA	Fishing	1.73%
NA	Boating	2.51%

Question 12.

What portion of the trail do you use most often?

WHAT PORTION OF THE HERITAGE RAIL TRAIL DO YOU USE MOST OFTEN?



Key to chart above (south to north)

MD = Maryland Line

NF = New Freedom

RR = Railroad

GR = Glen Rock

HJ = Hanover Junction

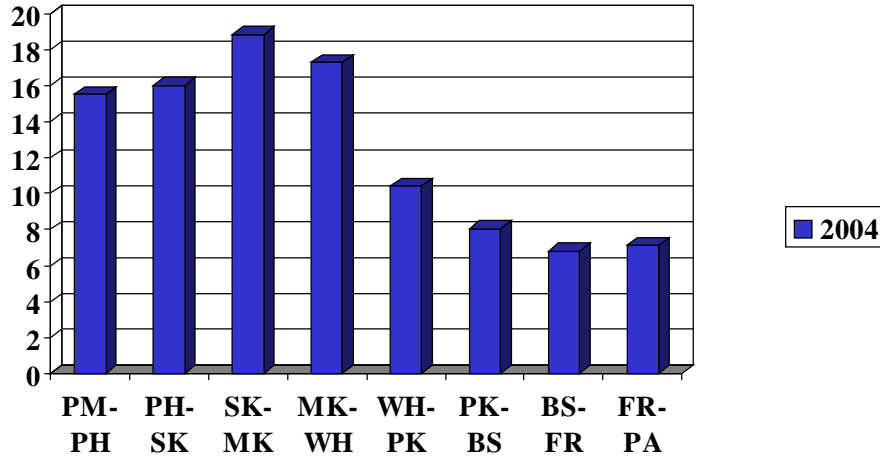
SV = Seven Valleys

GS = Glatfelters Station

BS = Brillhart Station

DT = Downtown York

WHAT PORTION OF THE NCR TRAIL DO YOU USE MOST OFTEN?



Key to chart above (south to north):

PM = Paper Mill Road	PH = Phoenix	SK = Sparks
MK = Monkton	WH = White Hall	PK = Parkton
BS = Bentley Springs	FR = Freeland Road	PA = Pennsylvania Line

Question 14.

Have you ever used the....

Heritage Rail Trail		NCR Trail	
NCR Trail	Yes	Heritage Rail Trail	Yes
67.43%		43.11%	
32.67%	No	56.89%	No

Question 15.

How did you find out about the Trail?

<u>Heritage Rail Trail</u>		<u>NCR Trail</u>
42.06%	Word of mouth	57.66%
4.67%	Roadside signage	5.11%
12.15%	Driving past	10.96%
12.34%	Newspaper	4.23%
7.29%	York County Parks Department	NA
NA	MD Dept. Natural Resources	6.48%
9.16%	Info from Rails to Trails Conservancy	6.97%
3.93%	Internet web site	3.86%
5.23%	Bike shop	3.36%
1.31%	Tourist Information Center	1.37%
1.87%	York Co Convention & Visitors Bureau	NA

Question 16.

Has your use of the Trail influenced your purchase of...

<u>Heritage Rail Trail</u>		<u>NCR Trail</u>
26.03%	Bike	24.77%
26.76%	Bike supplies	23.34%
15.82%	Auto Accessories	11.82%
1.70%	Running/walking/hiking shoes	9.49%
15.45%	Clothing	10.84%
14.23%	Nothing	18.22%
NA	Fishing gear	1.51%

Question 17.

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

<u>Heritage Rail Trail</u>		<u>NCR Trail</u>
\$347.11	Average expenditure in past 12 months	\$333.12

Question 18.

In conjunction with your most recent trip to the Trail, did you purchase any of the following?

<u>Heritage Rail Trail</u>		<u>NCR Trail</u>
26.46%	Bottled water/soft drinks	29.39%
12.26%	Candy/snack foods	15.77%
8.46%	Sandwiches	6.38%
8.46%	Ice cream	9.30%
17.23%	Lunch at a restaurant along the Trail	6.95%
1.23%	Film	1.44%
NA	Bike rental	1.03%
NA	Canoe rental	0.38%
NA	Tube rental	1.31%
25.69%	None of these	28.08%

Question 19:

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

<u>Heritage Rail Trail</u>	<u>NCR Trail</u>
\$13.97	Average expenditure per person on most recent trip \$9.14

Question 20:

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

<u>Heritage Rail Trail</u>	<u>NCR Trail</u>
9.89%	Yes 4.95%

<u>Heritage Rail Trail</u>	<u>NCR Trail</u>
43.18%	Hotel/motel 47.36%
6.82%	Bed and Breakfast 10.53%
NA	Mill Pond Cottage 10.53%
15.91%	Friend or relative 13.16%
29.55%	Campground 15.79%
4.55%	Other 2.63%

Question 21.

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

<u>Heritage Rail Trail</u>	<u>NCR Trail</u>
\$70.67	Average expenditure per night \$61.09

Question 22.

In your opinion, the maintenance of the Trail is...

<u>Heritage Rail Trail</u>	<u>NCR Trail</u>
45.53%	Excellent 57.43%
43.31%	Good 36.34%
7.48%	Fair 4.91%
0.68%	Poor 1.33%

Question 23. Heritage Rail Trail

Question 24. NCR Trail.

In your opinion, the safety and security along the Trail is...

<u>Heritage Rail Trail</u>	<u>NCR Trail</u>
53.09%	Excellent 44.93%
36.84%	Good 47.47%
8.47%	Fair 5.60%
1.60%	Poor 2.00%

Question 24. Heritage Rail Trail

Question 25. NCR Trail.

In your opinion, the cleanliness of the Trail is...

<u>Heritage Rail Trail</u>		<u>NCR Trail</u>
62.67%	Excellent	65.08%
31.22%	Good	31.08%
5.66%	Fair	3.04%
0.45%	Poor	0.79%

Question 25. Heritage Rail Trail

Question 26. NCR Trail.

Please rank these public benefits of the Trail with 1 being not important and 7 being extremely important. (The results represent the average ranking by those who responded to this question.)

<u>Heritage Rail Trail</u>		<u>NCR Trail</u>
5.91	Preservation of open space	5.74
5.91	Health and fitness	5.51
5.74	Public recreation	5.42
4.13	Tourism and business development	3.66
4.69	Nature education	4.71
4.34	Access for disabled persons	4.63
3.18	Alternative transportation	3.24
5.19	Historic preservation	NA
NA	Community pride	4.54

Question 26. Heritage Rail Trail

Question 27. NCR Trail

What is your gender?

<u>Heritage Rail Trail</u>		<u>NCR Trail</u>
57.95%	Male	54.56%
42.05%	Female	45.44%