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Pine Creek Rail Trail 2006 User Survey and Economic Impact Analysis

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And to the citizens and businesses throughout the Pine Creek Valley of Pennsylvania

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Executive Summary



The Pine Creek Rail Trail covers 62.6-miles in north-central Pennsylvania. Segments of the trail were first opened a decade previously as development proceeded south from Ansonia toward Jersey Shore. Along the route, the trail passes through the heart of the Pine Creek Valley and the “Grand Canyon of Pennsylvania” through forests, rich farmland and historical villages.

During the summer of 2006 this initial study of the users of the Pine Creek Rail Trail was conducted by Rails-to-Trails Conservancy under a grant from the Pennsylvania Department of Conservation and Natural Resources. This study utilized survey methodology previously tested on Pennsylvania trails and documented in Rails-to-Trails Conservancy’s Trail User Survey Workbook (www.railstotrails.org/resources/documents/resource_docs/UserSurveyMethodology.pdf). This survey was designed to monitor user characteristics and determine the economic impact of the Pine Creek Rail Trail.

Self-mailing and postage-paid survey forms were available April through October 2006 at ten official trailheads along the Pine Creek Rail Trail, and at many of the merchants who cater to trail users. Completed responses were mailed back to Rails-to-Trails Conservancy. In all, 1,049 completed survey forms are included in this study.


While the majority of trail user survey respondents reside in Pennsylvania (85.99 percent), the trail attracts users from New York (5.41 percent), Maryland (1.74 percent), New Jersey (0.97 percent) and 20 other states (5.60 percent). There were two respondents from Canada and one from the United Kingdom. Of the survey respondents from Pennsylvania most were from Lycoming County

(22.13 percent). Coming in second was Lancaster County (9.21 percent) and third was Tioga County (8.65 percent). Trail user survey respondents represented 56 of Pennsylvania’s 67 counties.

The largest percentage of survey respondents (41.07 percent) indicated that they used the trail a few times during the year, which is what would be expected of a destination trail. For 20.37 percent of the survey respondents this was their first trip to the Pine Creek Rail Trail which indicates that word is still spreading about this great Pennsylvania resource. More than 88 percent of the trail survey respondents are over the age of 35. More than 45 percent of the survey respondents are over the age of 55. With regard to gender, men use the trail (55.85 percent) somewhat more frequently than women (44.15 percent). These demographics are very typical of those found in other rail-trail user surveys.

Biking is the predominant form of recreation on the Pine Creek Rail Trail. Nearly 64 percent 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 62 percent of the users spend at least two hours on the trail during an outing. Another 29 percent spend between one and two hours.

The segment of the trail that receives the highest usage according to the survey respondents is between Tiadaghton and Blackwell through the Grand Canyon of Pennsylvania (14.03 percent). The section of the trail that is least utilized is the lowest section from Waterville south. Officially, this section of the trail did not open until the summer of 2006. Survey respondents indicated that they would be on the trail anytime they could without particular preference for morning, afternoon or evening.



Weekends are more popular for getting on the trail than weekdays but many of the respondents indicated they used the trail on both weekdays and weekends.

Respondent's knowledge of the trail came primarily from "word of mouth" (48.14 percent). "Other" was the second-most frequent response to this question (24.02 percent). Many of the survey respondents were either residents of the Pine Creek Valley or had been coming to the valley for vacation or recreation for many years and were aware of the trail when it was still an active railroad. Rails-to-Trails Conservancy, a national organization that promotes the development of rail-trails, was the third-most important source of information for the users of the Pine Creek Rail Trail (19.07 percent).

In terms of economic impact, 82 percent 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 expenditure of \$354. While these types of purchases are not annually recurring, even with the most conservative usage estimate they amount to millions of dollars in sales. As a destination trail many of these purchases do not take place in the Pine Creek Valley. However, considering that nearly 86 percent of survey respondents are Pennsylvania residents, the trail is having a dramatic impact of the state's economy.

Even more significant is the purchase of "soft goods" (water, soda, candy, ice cream, lunches, etc.)—86 percent of the respondents indicated they purchased these types of items on their most recent trail outing. The average purchase amount per person was \$30. Considering that the average

user makes several trips to the trail on an annual basis, at the minimum these types of purchases are also contributing several million dollars to the economy of the Pine Creek Valley. And, these types of purchases are recurring year after year.

As a destination trail, the Pine Creek Rail Trail user frequently has to stay overnight in the valley in conjunction with a visit. The survey respondents indicated that more than 57 percent of them spent an overnight stay in conjunction with a trail excursion. The most frequent type of accommodation was indicated as "Other" which in most cases was a vacation home or camp in the valley. Local motels/hotels (22.43 percent) were the second-most frequently indicated type of accommodation. On average the survey respondents spent 3.34 nights in overnight accommodations and spent an average of \$69 per night.

More than 68 percent of the respondents to this survey stated that the maintenance of the trail was excellent. More than 90 percent felt that safety and security along the trail was good to excellent. More than 72 percent of respondents felt the cleanliness of the trail environment was excellent.

When asked if they would be willing to pay an annual "user fee" to help maintain the Pine Creek Rail Trail, nearly 60 percent responded that they would.

Regarding the PA Wilds (a state tourism area), 21.3 percent of survey respondents didn't know what they were. More than 50 percent of survey respondents indicated they did not visit other PA Wilds sites in conjunction with their trip to the Pine Creek Rail Trail.

Historical Perspective



The Pine Creek Rail Trail runs beside its namesake creek through the Grand Canyon of Pennsylvania from Ansonia to Jersey Shore. The railroad along Pine Creek opened in 1883 as the Jersey Shore, Pine Creek and Buffalo Railway. It carried timber to sawmills in Tiadahton, Cammal and Slate Run. Ownership passed to the Fall Brook Coal Company in 1884 and the railroad transported coal north into New York. By 1896 the railroad was carrying seven million tons of freight and three passenger trains on daily runs between Wellsboro Junction and Williamsport. The New York Central (NYC) Railroad ran the railroad via a lease in 1899, and was fully integrated into the NYC in 1914. Conrail took over the line in 1976. The last freight train passed through the gorge in October 1988, ending more than a century of service.

The process of the rail line becoming a rail-trail actually started in early June 1988 when Conrail informed the Lycoming County Planning Commission of their intention to abandon the line along Pine Creek from Jersey Shore to Wellsboro. The Lycoming County Planning Commission took action in late June supporting abandonment but stipulating that any future use of the corridor be sensitive to environmental preservation, without causing additional development pressures. “Initiatives which involve purchase of land for hiking trails and exclusion of motor vehicles, should be supported as this will compliment the natural aesthetic qualities of the valley and open opportunities for additional federal and state funding...”

On July 25, 1988 Conrail filed for abandonment with the Interstate Commerce Commission (ICC) (now the Surface Transportation Board).

In August the Lycoming County commissioners issued a letter to the then Department of Environmental Resources (DER) urging the state to give priority to acquisition of the abandoned right-of-way with prohibition of motorized vehicle usage. On August 18, 1988 a memo from State Forester James Nelson, to DER Assistant Council Martha Smith outlined the rail-to-trail concept for Pine Creek to be undertaken by DER.

On September 12, 1988 the ICC decision on abandonment was issued to all parties of interest. Notice of Interim Trail Use was granted as requested by DER and Rails-to-Trails Conservancy. Under the agreement, Conrail could remove the tracks and other facilities after September 21, 1988 and Conrail and DER were permitted to negotiate mutual agreeable terms for trail use.

It took until July 1990 for the Pennsylvania House and Senate to pass legislation—Senate Bill 967—which allowed the state to purchase the corridor via quit claim deed for \$1, and lead to the creation of Pennsylvania’s longest rail-to-trail conversion. Construction of the trail could not proceed until an operation and maintenance plan had been approved by the Pine Creek Trail Advisory Council. That document was prepared by DER’s Bureau of Forestry. Construction of the first section of the trail from Ansonia to Blackwell began in 1995. This 19-mile section opened in August 1996. In June 2001 an additional 23-mile section opened that extended the trail from Rattlesnake Rock to Waterville. The section of trail from Waterville to the White Tail trailhead was available for use in the fall of 2005. The southernmost section of the trail to a new trailhead at Jersey Shore opened during the summer of 2006.

Locational Analysis



Built along the abandoned Conrail right-of-way, the Pine Creek Rail Trail has become one of the most popular recreational trails in Pennsylvania. Frequently lined with miles of split-rail fencing, the Pine Creek Rail Trail is a highly developed and maintained trail passing through the middle of some of Pennsylvania's remaining wilderness, protected within the boundaries of the Tioga and Tiadahton State Forests. The terrain is relatively flat and the surface is a firm, crushed stone making it excellent for bicycling, hiking, running and horseback riding, as well as winter sports such as cross-country skiing and snow shoeing.

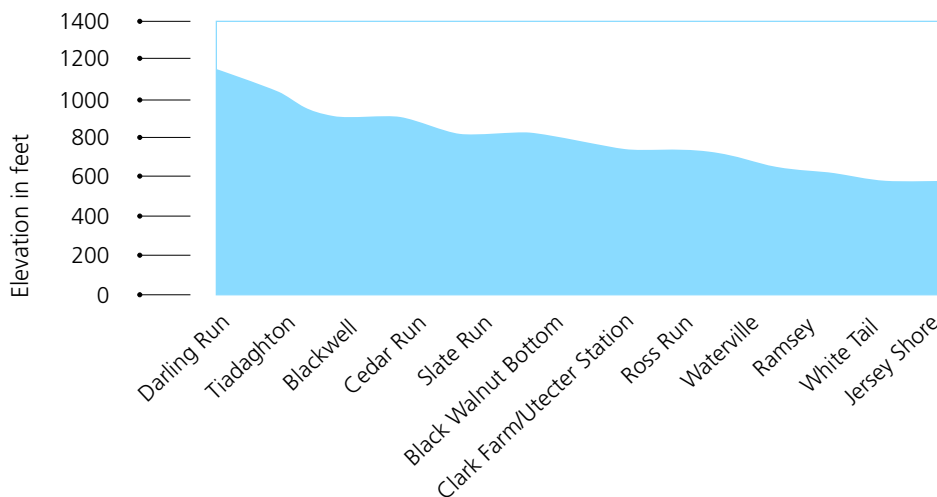
The trail parallels Pine Creek for most of its length. Pine Creek and its tributaries are known for some of the best trout fishing in Pennsylvania. The stream provides additional recreational opportunities for canoeing, kayaking and rafting.

Facilities along the trail include benches, picnic tables and comfort stations. Communities along the trail offer more extensive facilities. There are bike rentals available in Wellsboro and Waterville. Refreshments can be purchased from small shops in most villages along the route.

The Pine Creek Rail Trail passes through woodlands and rural countryside. There are some road crossings marked with bollards and gates, but with the exception of crossing Pennsylvania Routes 44 and 414, all are lightly used by vehicular traffic.

For the most part, the trail runs north-south. Signage at trailheads provides the distance to the next trailhead. There are no mileage markers along the trail between trailheads. The grade moving from south to north is slightly uphill. The elevation at Jersey Shore is 645 feet and increases to 1,146 feet at Darling Run over 60 miles. A profile of the trail can be found below.

PINE CREEK RAIL TRAIL PROFILE



Pine Creek Rail Trail Distance in Miles

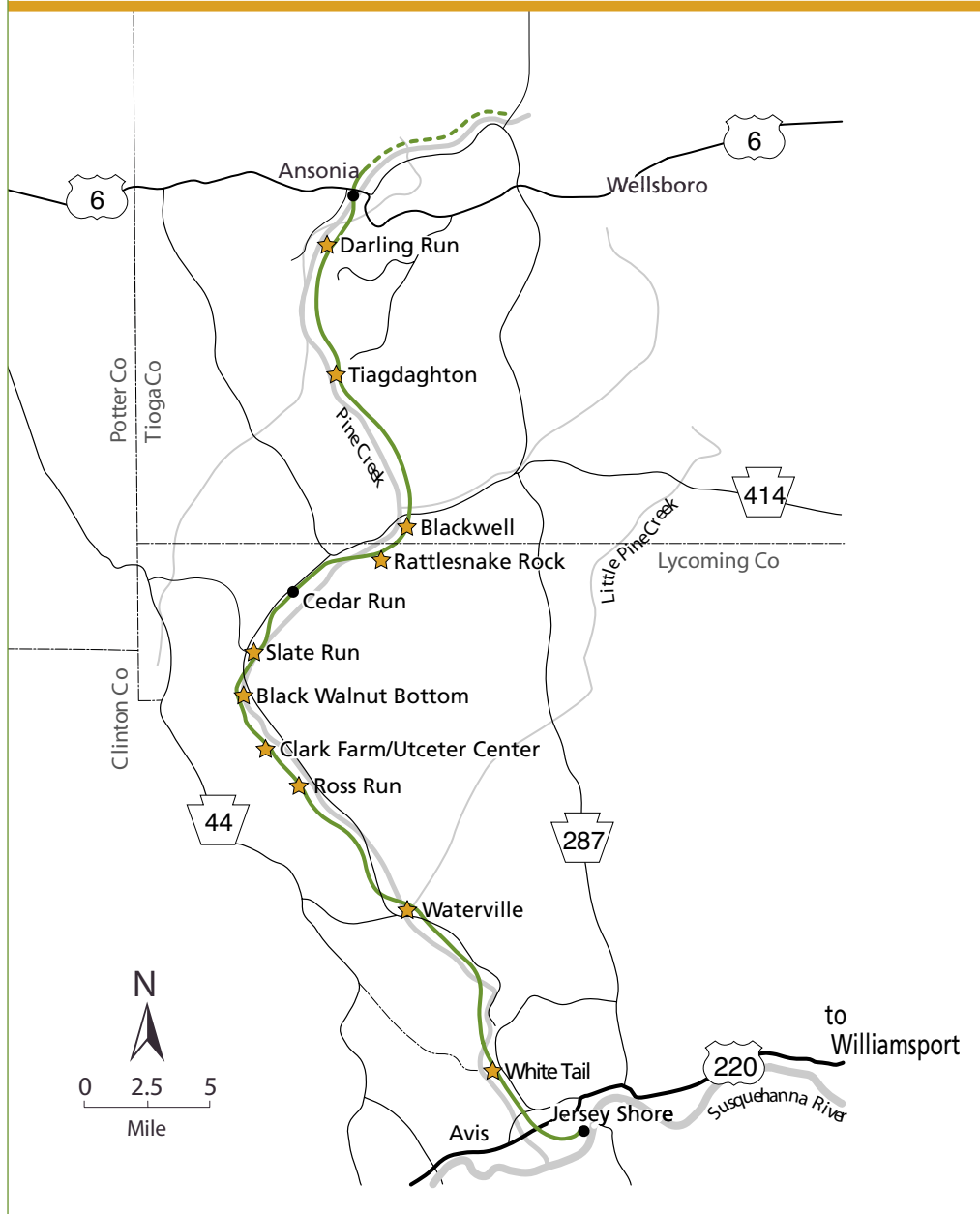


LANDMARK	MILES
Wellsboro to Ansonia (under construction 2007)	7.3
Ansonia to Darling Run	1.2
Darling Run to Tiadaghton	7.7
Tiadaghton to Blackwell	8.3
Blackwell to Rattlesnake Rock	1.8
Rattlesnake Rock to Cedar Run	4.0
Cedar Run to Hilborn Fields	2.1
Hilborn Fields to Slate Run	2.7
Slate Run to Black Walnut Bottom	1.8
Black Walnut Bottom to Ross Run	2.7
Ross Run to Cammal Comfort Station	2.6
Cammal Comfort Station to Dry Run	5.4
Dry Run to Waterville Access	2.3
Waterville Access to Ramsey	3.9
Ramsey to Bonnell Flats	0.4
Bonnell Flats to Jersey Shore	8.4

Trail User Surveys were placed in self serve plastic boxes at 10 of the main trail access points along the trail. The surveys were available at these locations from April 1, 2006 until October 31, 2006. The surveys were designed as postage-paid self mailing documents.



PINE CREEK RAIL TRAIL



★ Trailheads where surveys were placed.

Pine Creek Region Demographics



The Pine Creek region of Pennsylvania is comprised of Lycoming and Tioga Counties. Williamsport is the most populous city in Lycoming County; Wellsboro is the most populous city in Tioga County.

PINE CREEK REGION DEMOGRAPHIC PROFILE*

	Lycoming County	Tioga County
Population	118,935 (2005 est.)	41,649 (2005 est.)
Median Household Income	\$35,892 (2003 est.)	\$33,054 (2003 est.)
Households	47,003 (2000 Census)	15,925 (2000 Census)
Persons Per Household	2.44 (2000 Census)	2.48 (2000 Census)

PINE CREEK REGION POPULATION GROWTH

	1990	2000	2010
Lycoming County**	118,710	120,044	121,397
Tioga County	41,126***	41,373***	43,060****

PINE CREEK REGION TOURISM DOLLARS*****

	2003
Lycoming County Tourism Expenditures	\$163,820,000
Tioga County Tourism Expenditures	\$ 62,960,000

* Source U.S. Census Bureau

** Source: Lycoming County Comprehensive Plan

*** Source: Tioga County Comprehensive Plan

**** Center for Rural Pennsylvania

***** Source: The Economic Impact of Travel and Tourism in Pennsylvania

Qualitative Values of the Pine Creek Rail Trail



Individual User Comments

The best way to evaluate the qualitative values of the Pine Creek Rail Trail is to let the trail users describe how they feel about the trail. The following are comments taken from the 2006 Trail User Survey forms.

"[A] very nice trail, maintained well, very pleasant experience. Rails-to-trails maintenance guys deserve a raise for the excellent trail."

"I'm going to make it a regular routine."

"We love the trail! We come twice a year for four days each time to bike and view the wildlife and scenery. Thanks!"

"We have been coming to this place since the trains were still running. The trail has made it even better."

"I've been coming to Slate Run for 60 years. The trail is a wonderful additional recreation activity. We love it!"

"[This was my first] extensive ride on trail in five years, and I really noticed an increase in trailside economic activity to service trail users. Can you publish a brochure that details all trailside food stores, accommodations and outfitters?"

"Best money the state ever spent. Could use a few more rest stops."

"Our vacation was planned around the bike trail."

"It would be nice to have mile-markers."

"This is one of the best rail-trails anywhere in United States. We need more state-wide publicity to get the word out. Great job."

"Rail-trails are the best parks. We have bicycled about 100 nationwide. With more toilet maintenance this would be the best."

Trail Manager Comments

Jeff Prowant is district manager of Tiadahton State Forest which maintains the southern portion of the Pine Creek Rail Trail. When asked what changes he has seen in the valley Prowant notes, "We definitely have seen an increase in the non-traditional users. Hunting has decreased...in Pennsylvania and the developed rail-trail has created a family-oriented recreational venue that has increased the economic viability of the valley."

"The majority of residents in the valley really love the trail and our strongest opponents have now become very strong proponents," says Prowant. Asked what challenges he faces in maintaining such a beautiful rail-trail in the midst of a state Forest, Prowant says, "One of the biggest challenges for the forestry staff is taking care of ongoing maintenance with the available funding. The trail users...expect always-clean comfort stations and a washout or downed tree to be repaired immediately."

On the northern end of the trail, District Forester for Tiago State Forest, Roy Siefert was asked about his perceptions of the trail. "The trail is a real asset to Tiago State Forest. It gives folks an opportunity to connect with nature they might not have otherwise. We're seeing many more seniors and families on the trail than I ever expected. It's obvious that the rail-trail is their calling card." Like the southern end of the trail, Siefert has seen an increase in the economic vitality of the region. "What used to be short season hunting camps are now being upgraded into summer homes and the rail-trail is frequently mentioned in real estate ads." Siefert also finds general maintenance issues to be the biggest challenge for the forestry staff.

2006 Survey Results



Question 1

What is your ZIP Code?

86%	Pennsylvania
5%	New York
2%	Maryland
1%	New Jersey
6%	All other states (20)
0.2%	Canada
0.1%	United Kingdom

(Pennsylvania—56 of 67 counties are represented in the sample)

22%	Lycoming County
9%	Lancaster County
9%	Tioga County
7%	Center County
7%	Clinton County
5%	Berks County
41%	Other PA Counties

Question 2

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

3%	Daily
6%	Between 3 and 5 times a week
10%	1 or 2 times a week
4%	Once a week
12%	A couple of times a month
4%	Once a month
42%	Few times a year
20%	First time

Question 3

Please identify your age group.

3%	15 and under
3%	16 – 25
6%	26 – 35
15%	36 – 45
28%	46 – 55
29%	56 – 65
17%	66 or older

Question 4a

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

23%	Yes
77%	No

Questions 4b

If yes, please indicate the number of children in each age of the following age groups.

13%	Under 5
31%	5 – 9
56%	10 – 15

Question 5

What is your gender?

56%	Male
44%	Female

Questions 6

What is your primary activity on the trail?

24%	Walking/hiking
64%	Biking
3%	Jogging/running
0.4%	Horseback riding
4%	Cross country skiing/snowshoeing
4%	Other

Question 7

Generally, when do you use the trail?

19%	Weekdays
32%	Weekends
48%	Both

Question 8

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

28%	Morning
20%	Afternoon
4%	Evening
49%	Anytime

Question 9

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

0.5%	Less than 30 minutes
8%	30 minutes to 1 hour
29%	1 to 2 hours
63%	More than 2 hours

* Percentages have been rounded.

Question 10

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

- 58% Recreation
- 38% Health and exercise
- 0.3% Commuting
- 1% Fitness training
- 3% Other

Question 11

During your visit to the trail did you...

- 5% Fish
- 4% Canoe
- 3% Kayak
- 3% Tube
- 32% Watch birds
- 36% Watch wildlife
- 17% Study flowers

Question 12

How did you find out about the trail? (Respondants were able to choose more than one option.)

- 48% Word of mouth
- 6% Roadside signage
- 11% Driving past
- 11% Newspaper
- 7% Parks Department
- 5% Bike shop
- 5% Convention and Visitors Bureau
- 19% Information from Rails-to-Trails-Conservancy
- 13% Internet web site
- 24% Other

Question 13

Has your use of the trail influenced your purchase of...?

- 23% Bike
- 26% Bike supplies
- 7% Auto accessories (bike rack, etc.)
- 9% Footwear
- 13% Clothing
- 4% Camping gear
- 18% Nothing

Question 14

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

The average for those who indicated they had made a purchase and provided a dollar amount was \$354.97. Respondants: 647.

Question 15

In conjunction with your most recent trip to the trail, did you purchase any of the following? (Respondants were able to choose more than one option.)

- 24% Beverages
- 14% Candy/snack foods
- 11% Sandwiches
- 16% Ice cream
- 17% Meals at a restaurant along the trail
- 0.3% Horse rental
- 3% Other
- 14% None of these

Question 16

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

The average for those who indicated they had made a purchase and provided a dollar amount was \$30.30. Respondants: 705.

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

Question 17

Did your visit to the trail involve an overnight stay in one of the following types of accommodations? Respondants: 602.

- 22% Motel/hotel
- 10% Bed-and-Breakfast
- 12% Friend or relatives home
- 8% DCNR campground/campsite adjacent to the trail
- 7% DCNR campground/campsite away from the trail
- 13% Private campground
- 27% Other

Question 18

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

Average number of nights per stay: 3.34.

Question 19

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

Average expenditure per night for those who provided an amount was \$69.08. Respondants: 373.

Question 20

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

68% Excellent
28% Good
3% Fair
0.5% Poor

Question 21

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

54% Excellent
38% Good
6% Fair
2% Poor

Question 22

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

73% Excellent
23% Good
3% Fair
0.7% Poor

Question 23

Would you be willing to pay a voluntary fee to help maintain the trail?

59% Yes
41% No

Question 24

What portion of the trail do you use most often?

14% Darling Run to Tiadaghton
14% Tiadaghton to Blackwell
14% Blackwell to Rattlesnake Rock
11% Rattlesnake Rock to Gramble
11% Gramble to Slate Run
10% Slate Run to Black Walnut Bottom
6% Black Walnut Bottom to Clark Farm
6% Clark Farm to Ross Run
10% Ross Run to Waterville
4% Waterville to White Tail
4% White Tail to Jersey Shore

Question 25

Which trail access point do you generally use when you visit the trail?

18% Darling Run
3% Tiadaghton
17% Blackwell
10% Rattlesnake Rock
11% Slate Run
4% Black Walnut Bottom
2% Clark Farm
3% Ross Run
14% Waterville
6% White Tail
3% Jersey Shore
8% Other

Question 26

Did you use a side trail to access the Pine Creek Rail Trail?

11% Yes
89% No

Question 26a

If yes, which side trail did you use?

28% Turkey Path – Leonard Harrison
8% Turkey Path – Colton Point
1% Bohem Run
12% West Rim
8% Mid State
7% Black Forest
5% Bonnell Run
6% Golden Eagle
25% Other

Question 27

Are you visiting any other sites in the PA Wilds on this trip or another trip?

26% Yes
52% No
21% Don't know the PA Wilds area

Methodology and Analysis



Utilizing the survey template from the Rails-to-Trails Conservancy's Trail User Survey Workbook as a starting point, the survey form was refined with input from the managers and staff of the Pennsylvania Department of Conservation and Natural Resources. The sample was self-selecting, that is trail users could pick-up survey forms that were available at each of the trail's primary trailheads and trailside businesses and mail them to Rails-to-Trails Conservancy via the provided business reply postage. Survey collection was conducted from the end of March 2006 through the end of October 2006.

For the purpose of this analysis, 1,049 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 1,049 usable surveys.

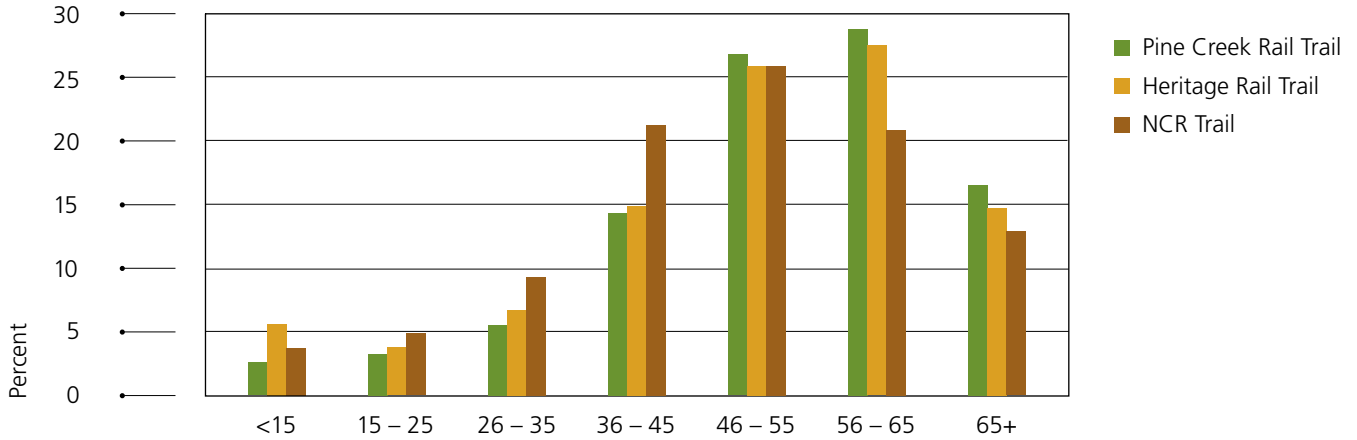
(Disclaimer: As a self-selecting survey, the findings are not absolute and no one can predict with any certainty how trail users will act in the future. That said, the findings track very closely with similar surveys and other published reports and anecdotal evidence.)

For the purpose of this analysis the data from the Pine Creek Rail Trail User Survey will be compared with data collected in a 2002 survey conducted by the Allegheny Trail Alliance on trails in southwestern Pennsylvania, a 2004 survey on the Heritage Rail Trail County Park in York County Pennsylvania, and a 2004 survey conducted on the Northern Central Rail Trail (NCR) in Baltimore County, Maryland. The data collection methodology and the wording of the questions in the Allegheny Trail Alliance survey vary slightly from the methods and wording of questions on the Pine Creek Rail Trail survey. However, because of the rural nature of the southwestern Pennsylvania trails, a comparison is warranted. The data collection methodology and the survey questions from the Heritage Rail Trail and NCR Trail survey are in, many cases, identical to those of the Pine Creek Rail Trail survey.

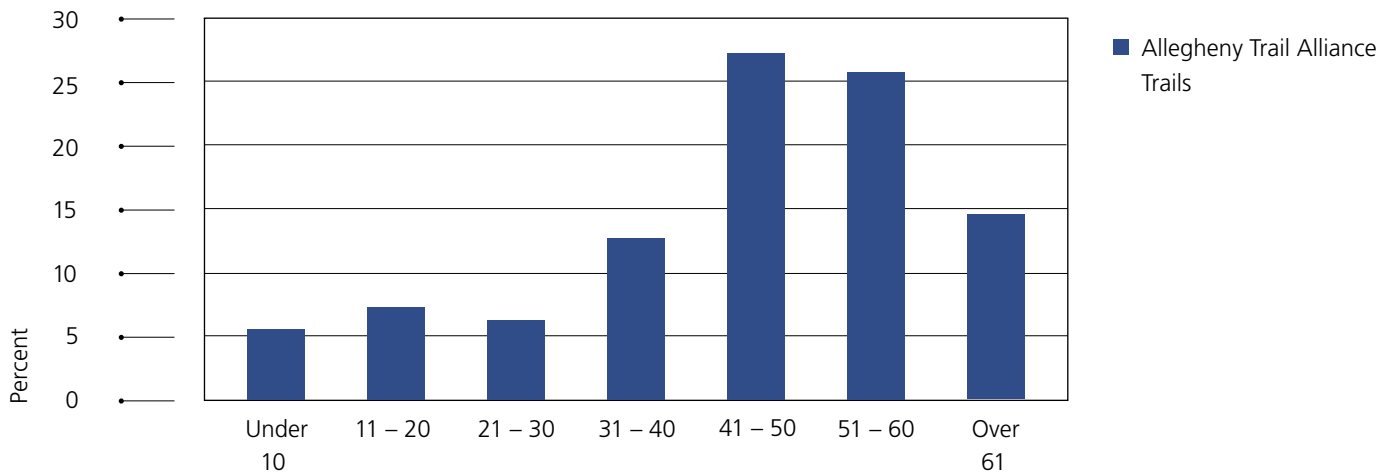
Comparative Analysis



PLEASE IDENTIFY YOUR GROUP



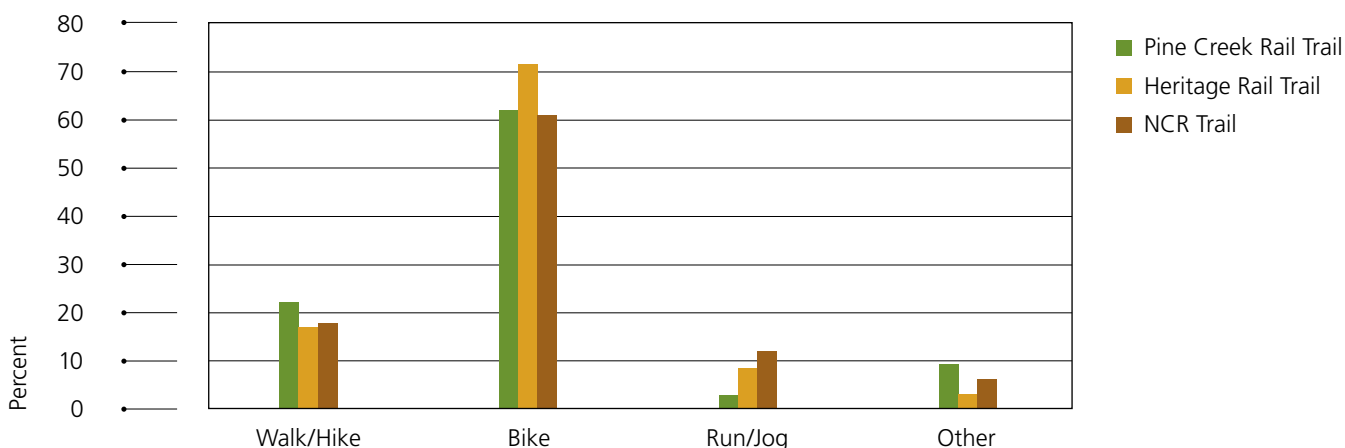
In all three of these studies, the vast majority of trail users are over the age of 35. This demographic is also true for other trail user studies conducted across the country. The survey respondents to the Pine Creek Rail Trail study are slightly older than the respondents to the Heritage Rail Trail and the NCR Trail. The NCR Trail has significantly more users in the 26–45 year age ranges. The lower end of the NCR Trail is located near very large complexes of townhouses and apartments which typically represent a younger demographic. The age of trail users was also one of the questions asked on the Allegheny Trail Alliance survey. While the age ranges were different than the three studies referenced above, the age profile is nearly identical as witnessed by the graph below.



Comparative Analysis



WHAT IS YOUR PRIMARY ACTIVITY ON THE TRAIL?

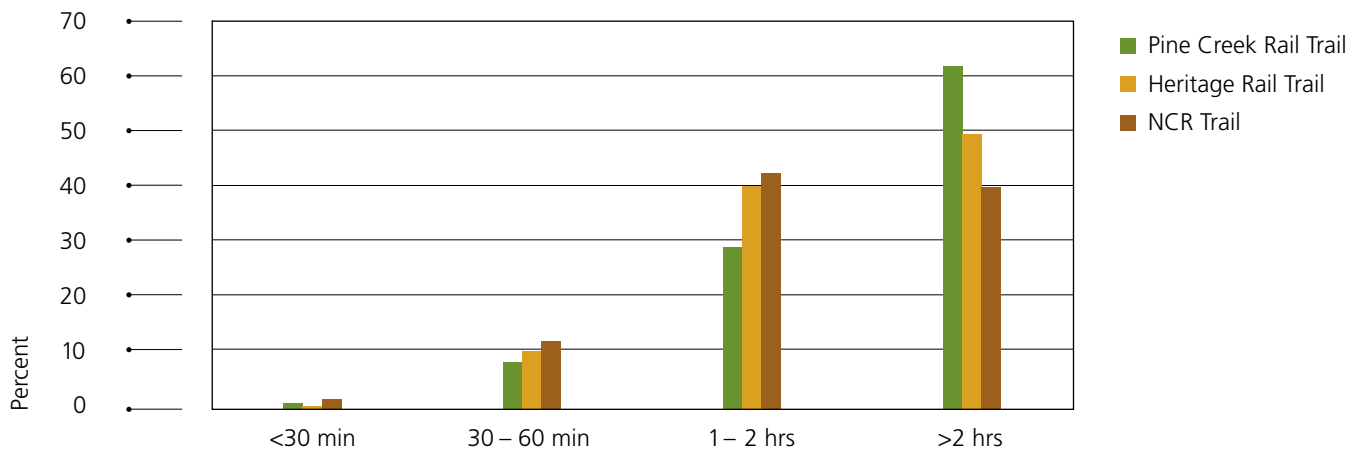


The distribution of primary trail activities on the three trails represented in the graph is very similar. The data collected on the southwestern Pennsylvania trails by the Allegheny Trail Alliance was at the trailhead level. Of the seven trailheads sampled, biking was the predominate activity at all of them. The lowest percentage of bikers was at the Montour trailhead at 53 percent, the highest percentage of bikers was at the Boston trailhead at 89 percent. At all of these trailheads, walking/hiking was the second-most mentioned primary activity. 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* 43.1 million Americans age 7 and older were estimated to have ridden a bicycle during 2005 (the most recent data available); 86 million Americans participated in exercise walking; 29.8 million participated in hiking. All of these activities experienced a percentage increase in activity over the previous survey in 2003.



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



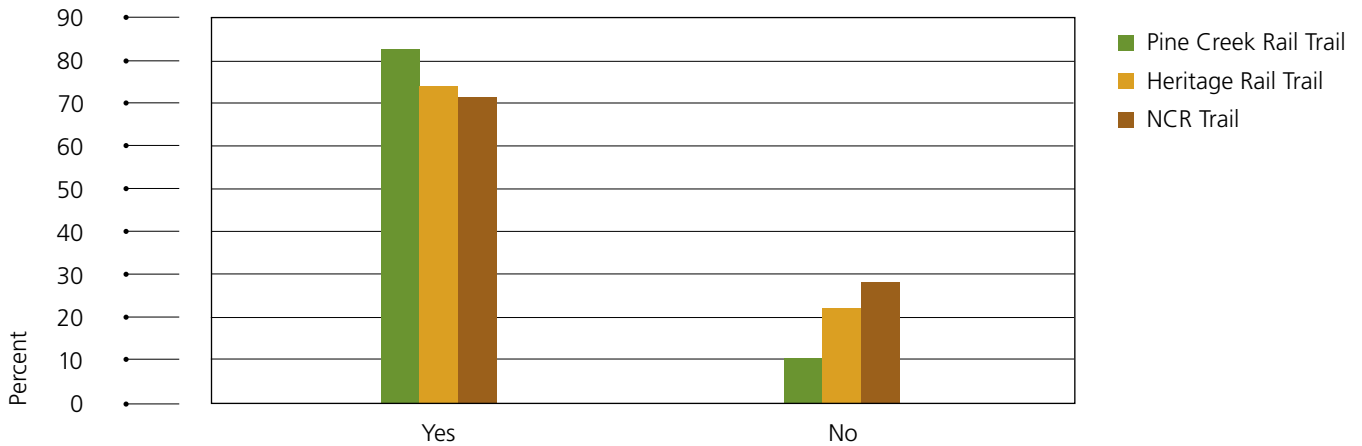
A considerably higher percentage of Pine Creek Rail Trail users spend more than two hours on the trail than is the case for the users of the Heritage Rail Trail or the NCR Trail. This is probably due to the longer length of the Pine Creek Rail Trail and that it is more “destination” oriented. Both the Heritage Rail Trail and the NCR Trail are 20 miles in length, although they connect at the Mason-Dixon Line to create a continuous 40-mile trail. Both of these trails run through primarily suburban areas close to population centers and are more conducive to a short ride or walk after dinner than the more remote Pine Creek Rail Trail where an all-day outing is not

uncommon. This supposition is reinforced by the data from the Allegheny Trail Alliance survey. For respondents at six of the seven trailheads in the survey, the average time spent on the trail was more than two hours and in four of seven cases more than three hours. The average time-length of a trail outing across all seven trailheads was three hours. The Allegheny Trail Alliance also asked respondents the one-way distance traveled during their trail experience. Across the seven trailheads the average one-way distance was 11.2 miles. The shortest average was six miles and the longest average was 17.

Comparative Analysis



DID YOU PURCHASE ANY “SOFT GOODS” IN CONJUNCTION WITH YOUR TRAIL VISITS?

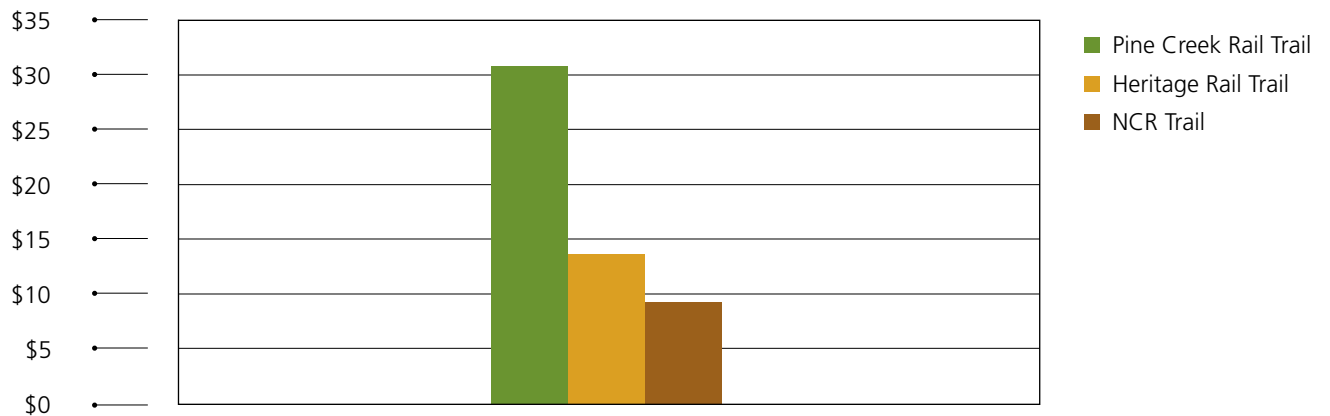


A slightly higher percentage of the users of the Pine Creek Rail Trail purchased “soft goods” which, for the purpose of this survey, included items such as snacks, water, ice cream and meals. A similar question was asked in conjunction with the Allegheny Trail Alliance survey. Across all seven trailheads surveyed, the average percentage that indicated a “local purchase” was 59 percent. The average responses ranged from a low of 24 percent to a high of 83 percent. To a large extent the percentage of trail users who make local purchases

is governed by the availability of local merchants from which to make a purchase. Along the Pine Creek Rail Trail there are a number of villages where goods are available. Many merchants in the valley have realized that potential new business can come from trail users and have added goods to cater to their needs. Along many sections of the trails in southwestern Pennsylvania there are no towns or villages and thus the ability to make a purchase is diminished.



AVERAGE EXPENDITURE ON "SOFT GOODS" ON A PER PERSON BASIS



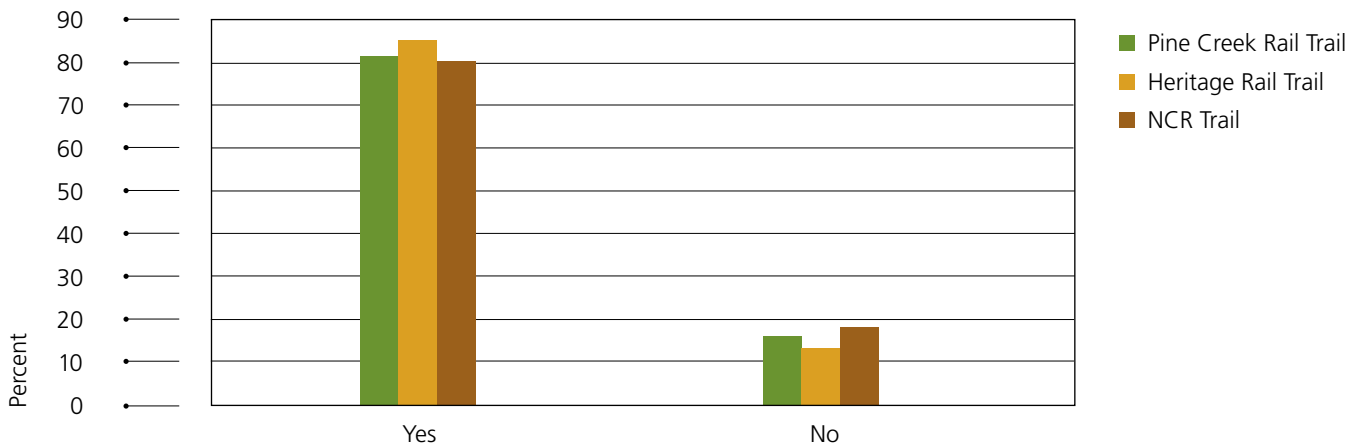
Spending on “soft goods” is considerably higher on a per person basis along the Pine Creek Rail Trail than it is on the Heritage Rail Trail or the NCR Trail. One reason is the destination nature of the Pine Creek Rail Trail. It is important to remember that more than half of the users stay overnight in the valley in conjunction with a Pine Creek Rail Trail visit. That means that instead of just a snack or lunch along the trail, these visitors are spending money on breakfast, lunch, dinner and snacks. A similar question was asked in conjunction with

the 2002 Allegheny Trail Alliance survey. While the mix of types of goods is slightly different, the results are surprisingly similar. For the more urban trails, the average expenditure per person ranged from a low of \$2.47 to \$8.83. For the “destination” trails, the average expenditure ranged from \$9.03 to \$15.61. The average across all seven trailheads was \$8.84. An interesting note is that a study conducted on the Heritage Rail Trail in 2001 came up with an average expenditure of \$8.33.

Comparative Analysis



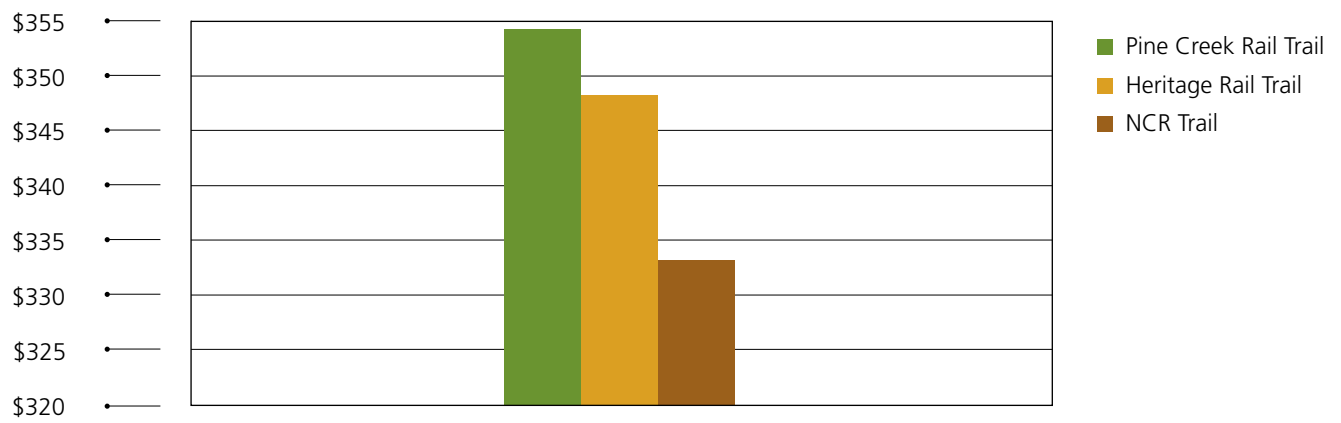
HAS YOUR USE OF THE TRAIL INFLUENCED YOUR PURCHASE OF ANY "HARD GOODS" DURING THE LAST YEAR?



In the case of all three of these studies, use of the rail-trail has influenced a "hard goods" purchase. For the purpose of these three studies, hard goods included bikes, bike supplies, auto accessories (bike racks, etc.) footwear and clothing. In the Allegheny Trail Alliance study, a similar question was asked where the category included primarily bikes and bike equipment. Across the seven trailheads surveyed, on average 74 percent of respondents stated that the trail did influence their purchase.



AVERAGE EXPENDITURE ON "HARD GOODS" ON A PER PERSON BASIS



The amount that the respondents reported spending on "hard goods" across all three of these studies is remarkably similar. The variation is less than \$25. While for the Pine Creek Rail Trail most of these expenditures do not occur in the valley, they certainly speak highly to the influence the development of the trail has on users and their expenditures closer to home. Again referring to the Allegheny Trail Alliance study, the question was

asked regarding spending on bicycles and biking equipment. While this question did not include all of the categories of goods that were included in the Pine Creek Rail Trail study the average expenditures on a per person basis were \$234.93 in 2002. The Allegheny Trail Alliance looked at spending by type of activity and here the bike users spent an average of \$269.77 while the hikers/walkers spent an average of only \$74.59.

Pine Creek Rail Trail User Estimate



During the summer of 2006, the Department of Forestry placed infrared counters along the Pine Creek Rail Trail. Counters were active between May 26 and September 18. The counters were placed at the following locations: north of the Jersey Shore trailhead (beginning in July 2006), north of the White Tail trailhead (counter was stolen in mid-summer and replaced a few weeks before Labor Day, replacement counter was placed at entrance to parking lot), north of the Waterville trailhead, north of the Black Walnut Bottom trailhead, near the Hilborn comfort station, north of the Rattlesnake Rock trailhead and at the Stone Quarry north of the Blackwell trailhead. No counters were placed in the vicinity of the Tiadaghton or Darling Run trailheads. During the course of the data collection period 53,303 hits were recorded by all of the counters combined.

For the purpose of creating this estimate, the data collected by the counters between June 2 and July 6 was subjected to a thorough analysis. This analysis is based upon methodologies used previously by the analyst to make estimates of trail-user volume.

The following are a set of assumptions that were made in order to account for users who may not have passed one of the counters or may have passed multiple counters. These assumptions result in an estimate of all trail users during the time period under consideration.

Assumptions:

From the Jersey Shore trailhead all users headed north and passed the White Tail counter.

From the White Tail trailhead all users headed north and passed the White Tail counter.

From the Waterville trailhead, half of the users headed north and half headed south.

All of the users going north from the Waterville trailhead passed the Waterville counter.

None of the users going south from the Waterville trailhead passed the Waterville counter.

None of the Waterville trailhead users going south passed the White Tail counter.

From the Black Walnut Bottom trailhead, half of the users headed north and half headed south.

All users going north from the Black Walnut Bottom trailhead passed the counter.

None of the users going south from the Black Walnut Bottom trailhead passed the counter.

All users going north from Black Walnut Bottom trailhead passed the Hilborn counter.

None of the users headed south from the Black Walnut Bottom trailhead passed the Waterville counter.

From the Rattlesnake Rock trailhead half of the users headed north and half headed south.

All users going north from the Rattlesnake Rock trailhead passed the counter.

None of the users going south from the Rattlesnake Rock trailhead passed the counter.

All of the users going south from the Rattlesnake Rock trailhead passed the Hilborn counter.



All of the counts at the Hilborn counter are accounted for by users from Black Walnut Bottom and Rattlesnake Rock trailheads.

All users going north from the Rattlesnake Rock trailhead passed the Stone Quarry counter and thus were accounted for when they passed the Rattlesnake Rock counter, the Stone Quarry counts (like Hilborn) were duplicative.

Because there were no counters further north than the Stone Quarry most users of the Tiadaghton and Darling Run trailheads were not counted. According to survey respondents, 82.36% used trailheads between Jersey Shore and Blackwell or other locations. Therefore there was an undercount that was corrected for by increasing the actual count by dividing the unique counts by 0.8236 to achieve a “100-percent count”.

All trips were out-and-back which means that each unique user passed a counter twice.

The distribution of usage across the full year is unknown; therefore distribution examples from secondary sources (Allegheny Trail Alliance, Pine Creek Camping Permits and York County Parks) have been employed to obtain an annual user estimate.

For the purpose of estimating annual trail visits, the data from June 2 through July 6 was used to establish a base one-month estimate.

The table on the following page represents the estimate of the annual number of user visits based upon three different distribution models. The Allegheny Trail Alliance model is the distribution of trail-user visits across the “trail season” in 2002.

The York County Parks model represents the five-year average distribution of visitors to all units in the York County Park system. The Pine Creek Camping model represents the eight-year average distribution of “persons camping” in the Pine Creek Valley as provided in a report entitled *2005 Pine Creek Canyon Annual Use Information Rail Trail Summation 1997–2005* distributed by the Department of Conservation and Natural Resources–Pennsylvania Forestry.



Pine Creek Rail Trail User Visit Projections 2006

	Allegheny Trail Alliance		York County Parks		Pine Creek Camping	
January			0.01	1,089	0.0022	304
February			0.02	2,178	0.0015	207
March			0.07	7,624	0.02	2,764
April	0.0628	5,993	0.11	11,980	0.268	37,042
May	0.1138	10,860	0.13	14,159	0.3471	47,974
June	0.1712	16,337	0.15	16,337	0.1182	16,337
July	0.1859	17,740	0.14	15,248	0.0763	10,546
August	0.141	13,455	0.14	15,248	0.0659	9,108
September	0.1321	12,606	0.09	9,802	0.0395	5,459
October	0.095	9,066	0.08	8,713	0.0436	6,026
November	0.0982	9,371	0.04	4,357	0.0139	1,921
December			0.02	2,178	0.0039	539
Total Visit Projections		95,428		108,913		138,227

Based on the three models presented on this chart, it is estimated that the number of unique user visits to the Pine Creek Rail Trail during 2006 was approximately 125,000.

Economic Impact



The economic impact of the Pine Creek Rail 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 a 12-month period. 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 Pine Creek Rail Trail. These visitors spend several nights in local accommodations ranging from high-end bed-and-breakfast inns to campgrounds to the home of a friend or relative.

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

Hard Goods

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

Bike	23%
Bike supplies	26%
Auto accessories	7%
Running/walking/hiking shoes	9%
Clothing	13%
Camping gear	4%
Nothing	18%

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

Average hard goods purchased \$354.97

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

Soft Goods

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

Beverages	24%
Candy/snack foods	14%
Sandwiches	11%
Ice cream	16%
Meals at a restaurant along the trail	17%
Horse rental	0.3%
Other	3%
None of these	14%



Economic Impact



Approximately how much did you spend per person on soft goods? (enter dollar amount)

Average soft goods purchase \$30.30

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



Overnight Accommodations

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

Of the surveys completed 57 percent indicated that their trip involved an overnight stay. The following is a breakdown by type of accommodation for those overnight visits:

Motel/hotel	22%
Bed-and-breakfast	10%
Friend or relatives home	12%
DCNR campground/campsite adjacent to the trail	8%
DCNR campground/campsite away from the trail	7%
Private campground	13%
Other	27%

Approximately how much did you spend per night on accommodations?

Average expenditure on overnight accommodations \$69.08

Average number of nights per stay 3.34

The following chart takes the data provided on hard and soft goods, and overnight accommodations 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. Accommodations also represent annually recurring expenditures within the Pine Creek Valley and adjacent communities.

Pine Creek Rail Trail Economic Impact Analysis



						Allegheny Trail Alliance Model	York County Parks Model	Pine Creek Camping Model
Estimated Number of Trail User Visits						95,428	108,913	138,227
Category	% Usage	Avg. \$	Avg. Life	Avg. # of Trips	Avg. # of Nights			
Hard Goods	82%	\$354.97	6 years	4.5		\$1,034,643	\$1,180,874	\$1,498,577
Soft Goods	86%	\$30.30				\$2,500,489	\$2,853,895	\$3,621,708
Overnight Accommodations	26%	\$69.08		4.5	3.34	\$1,277,986	\$1,458,610	\$1,851,035

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

In the above example the calculation would look like this: (.8247 X (\$354.97÷6)) X (95,426÷4.5) = \$1,064,643

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

In the above example the calculation would look like this: (.8648 X \$30.30 X 95,426) = \$2,500,489

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

In the above example the calculation would look like this: (.2612 X \$69.08) X (95,426÷4.5) X 3.34 = \$1,277,986

* 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.

** To estimate spending on overnight accommodations, those accommodations that do not involve a nightly fee needed to be eliminated from the percentage of respondents that indicated they stayed overnight. In this case the vast majority of “Other” responses represented stays at vacation homes and camps (602-165 = 437). Also respondents that stayed with friends or relatives were eliminated from the percentage (437-72 = 365). Also, those who camp at DCNR facilities do not pay a fee so there is another reduction in the percentage that pay for accommodations (365-46-45 = 274). Thus, while 57.39% (602÷1049) of the survey respondents indicated that they had an overnight stay in conjunction with their trip on the Pine Creek Trail, only 26.12% (274÷1049) paid a fee for that overnight stay.

Pine Creek Rail Trail Business Impact and Construction Costs

Pine Creek Rail Trail Business Impact

During the course of the user survey, a number of businesses along the trail were surveyed. While there was not a sufficiently large sample to make any quantitative conclusions, the qualitative responses from the owners of these businesses are worthy of inclusion in this report.

The businesses interviewed included hotels, restaurants and general stores.

All of the businesses owners interviewed indicated that the trail had resulted in an increase in business. One business owner stated that trail users accounted for between 35 percent and 49 percent of his business.

All of the businesses indicated that the presence of the trail had caused them to add new products, extend their hours of operation and hire additional staff. One of the businesses had remodeled and added space.

All of the businesses had added amenities to serve the trail user. In most cases these included a bike rack at the business location. Some of the businesses now provide box lunches for trail users and picnic tables along the trail.

The most important finding to come out of the business interviews wasn't contained in the questions on the survey forms—it was the enthusiasm in the voice of the individuals that were interviewed that spoke volumes. They believed that the Pine Creek Rail Trail was a real asset to the valley and their business.

Pine Creek Rail Trail Construction Costs

Acquisition cost to Pennsylvania since Conrail quit-claimed the corridor for the sum of \$1.

Through 2006 the total construction costs were \$8.25 million dollars. An additional \$2.3 million dollars (estimated) will be spent for a bridge crossing Pennsylvania Route 237. The bridge is still in design in early 2007.

Design costs are generally estimated to be approximately 20 percent of construction costs. Therefore, design costs through 2006 would be about \$1.65 million. When design of the Route 237 bridge is completed that will add approximately \$460,000.

At this time total estimated construction and design costs for the Pine Creek Rail Trail, including the Route 237 bridge would be \$12,660,000.

With soft good spending and spending on overnight accommodations contributing between \$3 and \$5 million a year to the economy of the Pine Creek Valley, in the words of some of the trail users, "it's the best investment the state has ever made."

Trail Maintenance, Security and Cleanliness

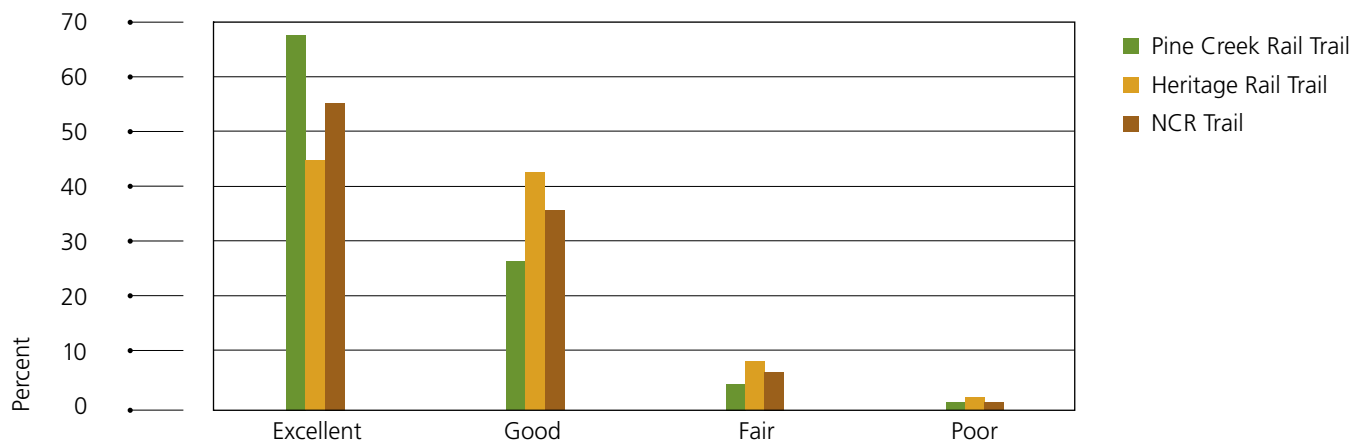


One of the most important aspects of the trail user survey is that it allows the trails management organization to receive feedback, both positive and negative, from trail users. The 2006 Pine Creek Rail Trail User Survey can serve as a benchmark upon which the future maintenance, security and cleanliness issues can be compared.

This series of questions was also posed in the 2004 studies on the Heritage Rail Trail and the NCR Trail. To provide a basis of comparison for the management of the Pine Creek Rail Trail the responses from those studies have been included in this section of the analysis.

How the Pine Creek Rail Trail is maintained has a significant impact on the economic contributions it makes to the Pine Creek valley.

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



According to the respondents to this survey the Pine Creek Rail Trail is extremely well maintained. This high standard will represent a challenge to the Department of Forestry as the trail ages. The Heritage Rail Trail in York County is maintained by the York County Department of Parks and the NCR Trail is maintained by the Maryland Department of Natural Resources.*

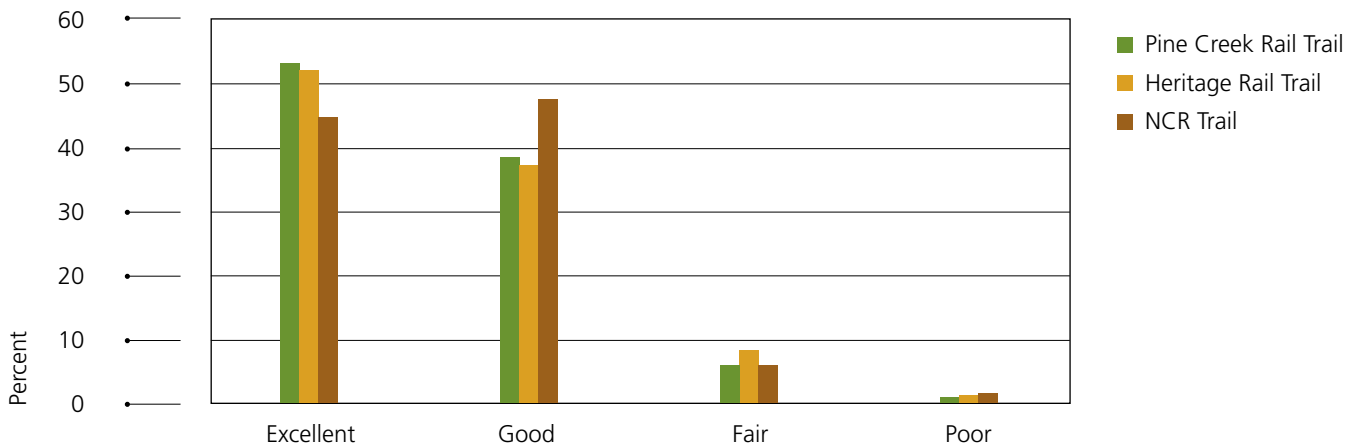
From the comments section the overall maintenance of the Pine Creek Rail Trail was highly praised.

* In all fairness to both of these organizations, the summer of 2004 was a devastating one in terms of heavy rain fall and flooding that impacted both trails. In some cases sections of trail were closed for several weeks until repairs could be made.

Trail Maintenance, Security and Cleanliness



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



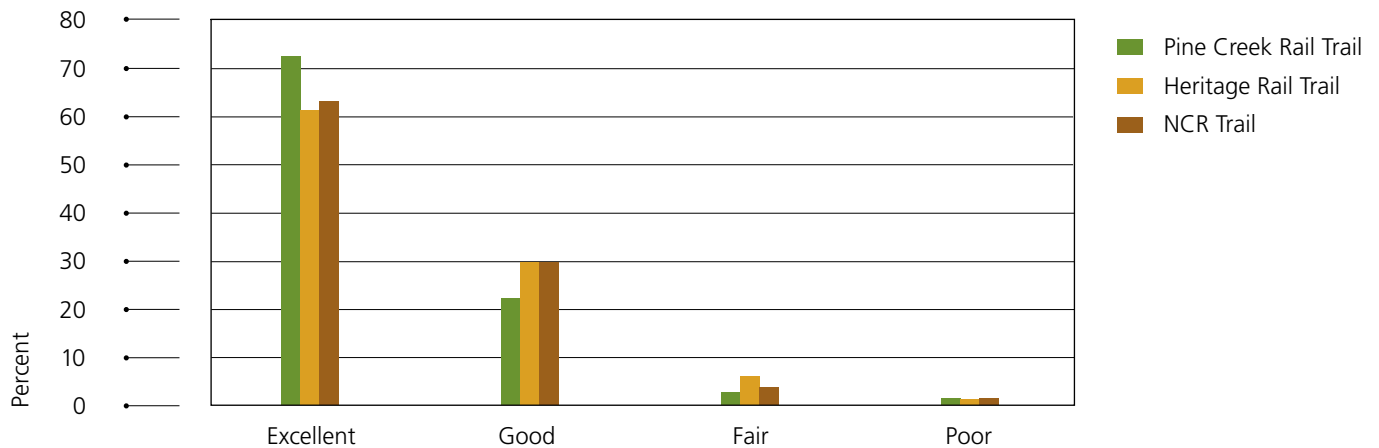
The feeling of security that trail users have is influenced by the presence of other trail users, visual observation of rangers, familiarity with the trail and the users general perception of safety in their overall environment. From the chart it appears that the survey respondents to the Pine Creek Rail Trail User Survey and the Heritage Rail Trail survey have approximately the same sense of security. Survey respondents to the NCR Trail survey felt somewhat less secure.

There were a number of comments from the survey respondents that “they never see rangers on the trail.”

There were a number of the comments that requested the construction of “storm shelters” that would be available along the trail where people would be protected from summer lightening storms.



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



Survey respondents rate the cleanliness of the Pine Creek Rail Trail very highly. This is as much a credit to the users of the trail as to any other factor. Generally trail users respect the trail 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. This statement also applies to the Heritage Rail Trail and the NCR Trail.

From the comments, there was some concern regarding the cleanliness of the comfort stations early in the season, but later comments praised the cleanliness of these facilities. Local residents have taken great pride in the trail and one local church group takes weekly walks along various sections of the trail with trash bags in hand.

Pine Creek Trail 2006 User Survey

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

- 1: What is your zip code? _____
- 2: How often, on average, do you use the trail? (circle one response)
Daily Between 3 and 5 times a week 1 or 2 times a week Once a week A couple of times a month
Once a month A few times a year First time
- 3: Please identify your age group. (circle one response)
15 and under 16 to 25 26-35 36-45 46-55 56-65 66 or older
- 4: Were any children 15 years of age or younger with you on your trail experience today (circle your response)? Yes No
If yes, please indicate the number of children in each of the following age groups:
____ Under 5 ____ 5 to 9 ____ 10 to 15
- 5: What is your gender? (circle your response) Male Female
- 6: What is your primary activity on the trail? (circle all that apply)
Walking/ Hiking Biking Jogging/Running Horseback Riding XC skiing/Snowshoeing Other activity (specify) _____
- 7: Generally, when do you use the trail? (circle one response) Weekdays Weekends Both
- 8: What time of day do you generally use the Trail? (circle one response) Morning Afternoon Evenings Anytime
- 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 Commuting Fitness Training (marathon, triathlon) Other (specify) _____
- 11: During your trail visit did you (circle all that apply) Fish Canoe Kayak Tube Watch birds Watch wildlife Study flowers
- 12: How did you find out about the trail? (circle all that apply)
Word of mouth Roadside signage Driving past Newspaper Parks Department Bike shop
Convention and Visitors Bureau Information from Rails-to-Trails Conservancy Internet web site Other _____
- 13: Has your use of the trail influenced your purchase of: (circle all that apply)
Bike Bike supplies Auto accessories Footwear Clothing Camping gear Nothing
- 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 along the trail
Horse rental Other _____ None of these
- 16: Approximately how much did you spend, per person, on the items above on your most recent visit? \$ _____
- 17: Did your visit to the trail involve an overnight stay in one of the following types of accommodations? (circle one response)
Motel/Hotel Bed and Breakfast Friend or Relatives Home DCNR Campground/Campsite Adjacent to the Trail
DCNR Campground/Campsite away from the trail Area Private Campground Other (please specify) _____
- 18: How many nights did you stay in conjunction with your visit to this trail? _____
- 19: Approximately how much did you spend on over night accommodations per night? \$ _____
- 20: In your opinion, the maintenance of the trail is (circle one) Excellent Good Fair Poor
- 21: In your opinion, the safety and security along the trail is (circle one) Excellent Good Fair Poor
- 22: In your opinion, the cleanliness of the trail is (circle one) Excellent Good Fair Poor
- 23: Would you be willing to pay a voluntary fee to help maintain the trail? (circle one) Yes No
- 24: What portion of the trail do you use most often? (circle all that apply)
Darling Run to Tiadaghton Tiadaghton to Blackwell Blackwell to Rattlesnake Rock Rattlesnake Rock to Gamble Run
Gamble Run to Slate Run Slate Run to Black Walnut Bottom Black Walnut Bottom to Clark Farm/Utecter Station
Clark Farm/Utecter Station to Ross Run Ross Run to Waterville
- 25: Which trail access point do you generally use when you visit the trail? (circle all that apply)
Darling Run Tiadaghton Blackwell Rattlesnake Rock Slate Run Black Walnut Bottom Clark Farm/Utecter Station
Ross Run Waterville Other (specify) _____
- 26: Did you use a side trail to access the Pine Creek Rail Trail? (circle one response) Yes No
If yes, which side trail did you use? (circle one) Turkey Path-Leonard Harrison Turkey Path-Colton Point Bohem Run
WestRim Mid State Black Forest Bonnell Run Golden Eagle Other (please specify) _____
- 27: Are you visiting any other sites in the PA Wilds on this trip or another trip? Yes No Don't know what the PA Wilds are

Additional comments _____

Rails-to-Trails Conservancy

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conservancy