

CHAPTER 4 Market feasibility-if the trail were built, who would use it, and for what purposes?

We arrived at estimates for demand and potential use of the trail through a variety of analyses, including a review of demographics, a Trail User Preference Survey of potential trail users from the valleys completed in 2013, a 2006 survey of actual users of the Pine Creek destination type trail in nearby Lycoming County, and a 2012 survey of the community based Buffalo Valley Rail Trail in neighboring Union County.

DEMOGRAPHIC ANALYSIS OF PENNS AND BRUSH VALLEYS

The Centre County Office of Planning and Community Development compiles demographic information for each region of the County, based on data from the 2010 Census, historical data from the 2000 Census where comparisons are useful to illustrate trends, and the American Community Survey for 2008-2012. The County Planning Office defines the “Penns Valley Region” as the six municipalities the railbed passes through on its path through the County, including Harris Township, Potter Township, Centre Hall Borough, Gregg Township, Haines Township and Penn Township, plus Millheim Borough in Penns Valley and Miles Township in Brush Valley.

The population of the Penns Valley Region (i.e.; Penns and Brush Valleys) grew from 11,382 people in 2000 to 12,819 people in 2010, a growth rate of 12.6%, slightly less than the county growth rate of 13.4%. Miles Township (Brush Valley) had the highest rate of growth of at 26.1%, while Haines (5%) and Potter (6%) townships experienced the slowest growth. The population is fairly evenly split between men (49.5%) and women (50.5%) and racially dominated by whites (99%). Nearly two thirds of the population (6,506) are employed in the workforce. Unemployment in the valleys is 4.9%, a full percentage point lower than the county as a whole. Communities closer to State College have the lowest unemployment rates (Potter Township’s rate is 1%, Centre Hall Borough’s rate is 1.9%) while townships further away are much higher (9.1% for Miles Township, 10.5% for Haines Township). Most people work somewhere other than the place they live. For example, 17 people live and work in Gregg Township, but 229 people commute in, and 1,028 commute somewhere else each day. 68.8% of Penns and Brush valley’s commuters drove alone, 15.5% carpooled, .02% used public transportation, 3.6% walked, 2.8% used some other form of transportation (e.g.; bicycles), and 9.1% worked out of their homes.



The **traditional farming community**, made up of Amish and “English” farmers, is the most visible community occupying both valleys along and near the corridor of this railbed, practicing a lifestyle that for centuries has by its very nature preserved the character defining features of this rural landscape

LIFESTYLES OF THE VALLEYS & THE GAP THROUGH THE MOUNTAINS BEYOND THEM

Although originally christened *The “Penns Valley” Rail Trail* Feasibility Study by the planners who first imagined the possibility of a rail trail on the former *Lewisburg and Tyrone (L&T)* railbed, the abandoned rail corridor actually passes through two valleys in eastern *Centre County* -- *Upper Brush Valley* east of Lemont and west of *Centre Hall*, the hinge point of the valleys and the railbed, and *Lower Penns Valley*, between *Centre Hall* and Coburn-- before slipping through the gap between Thick and Poe Paddy mountains carved by Penns Creek between Coburn and the *Centre County* line. The people who occupy these three communities: Penns Valley, Brush Valley, and “the gap through the mountains beyond them” are in many cases as “culturally distinct” as they are “geographically distinct.” In many cases, attitudes about rail trails and people’s likelihood of using them may have as much to do with values and lifestyle choices as they do about the places they chose to live, work and play. The **traditional farming community**, made up of Amish and “English” farmers, is the most visible community occupying both valleys along and near the corridor of this railbed, practicing a lifestyle that for centuries has by its very nature preserved the character defining features of this rural landscape. That lifestyle has contributed much to the valleys’ significance, earning the valley’s eligibility for listing on the prestigious National Register of Historic Places. As hunting and fishing, the recreational preferences most often associated with this traditional lifestyle group, continue their steady decline—a long term trend generally following the decline in the number of people living on the farm since WWII—participation in outdoor activities like hiking, biking and wildlife watching continue to grow among residents of traditional rural communities. While it’s difficult to know with certainty if the traditional farming communities of Penns and Brush valleys would follow that trend if a rail trail was built in this valley, it’s not unusual to see the more visually identifiable members of the traditional farming community in Buffalo Valley, the Mennonites, walking or riding bikes or scooters on the Buffalo Valley Rail Trail in neighboring Union County. As in most cases where a railbed has been abandoned and reverted back to the present heirs of the landowners who first granted the railroad a right of passage through their property, it’s understandable that those who own and use the railbed now for their own purposes and enjoyment may not be as quick to embrace the idea of sharing their land with neighbors who don’t own the right of way now but would enjoy having access to it for their own purposes and enjoyment.



The community most familiar with and in most cases supportive of rail trails in “the valleys” is the demographic group many locals refer to as the **alternative community**, a group that has over the last several decades brought its own special blend of lifestyles and values to the valleys.

In many cases, it's a matter of lifestyle and familiarity with rail trails that inspire those who frequent them to enthusiastically embrace the idea of a rail trail on their land or their neighbor's land. The community most familiar with and in most cases supportive of rail trails in "the valleys" is the demographic group many locals refer to as the **alternative community**, a group that has over the last several decades brought its own special blend of lifestyles and values to the valleys. Attracted by the pristine character of the landscape and a desire to live close to nature while still enjoying the cultural and educational amenities of a setting positioned equidistant between Penn State, Bucknell, and Lock Haven University, they also have been some of the valley's most entrepreneurial residents, working as self-employed carpenters, electricians, and artisans of all trades and crafts, many opening coffee shops, cafes, art galleries, on-farm markets, and brew pubs that have brought a vibrancy and sense of renewal to many of the valleys' historic commercial and cultural centers. Many of the alternatives are also farmers who practice "alternative" forms of agriculture, like permaculture, biodynamic and organic farming. Not surprisingly, many of the alternatives also tend to prefer alternative forms of transportation, like walking or biking where and when they can, so it's understandable that a rail trail would be a high priority for many of them.

Another significant community occupying the valleys is comprised of people who, for the most part, work at Penn State or one of the many industries that have grown up around the University, people who make their living "off" rather than "on" or "from" this land. Locals refer to this demographic group as **the bedroom community** because they spend their days at work in State College and their evenings at home in the countryside. Although some bedroom community residents do live on farms or farmettes, most of them live on small lots carved from the farm, or in one of the many rural hamlets, villages or boroughs that blossomed when the railroad came through the valley. Having access to open space and recreational opportunities, like parks and trails, is understandably going to be a greater priority for residents of the bedroom community living in close quarters than for the "traditional" farming community more accustomed to passing leisure time hunting and fishing on their own land than hiking or biking on a trail. Many of them also value the open space that surrounds them for its aesthetic value, thankful that the farmers who own or rent the land are still able to make a living from it. But many of these non-farm residents also moved to this region to escape busier lives elsewhere. Some of them place privacy at the top of their list of rural values, and many of them expressed concern that the 27 mile "destination" type trail originally proposed by planners will bring too many "outsiders," diminishing the rural character that drew them here in the first place.



The concern for privacy is even greater for the people who own what are --for the most part-- seasonally occupied camps in the remote region of the gap Penns Creek carved through Thick and Poe Paddy Mountains in Bald Eagle State Forest.

The concern for privacy is even greater for the people who own what are --for the most part-- seasonally occupied camps in the remote region of the gap Penns Creek carved through Thick and Poe Paddy Mountains in Bald Eagle State Forest. The **seasonal community** living in the gap beyond the valleys comprises a fourth distinct population living alongside the railbed that follows Penns Creek on its journey through the county. The hills and hollows of the gap attract a variety of folk, some from distant places who come here infrequently to enjoy the privacy, fresh mountain air, pristine native trout filled waters and dark skies at night, and others who live nearby and come more often to get away from the hustle and bustle of the places they live and work. It's not surprising that among this group we found a few landowners excited about sharing the magic of their "Brigadoon" between Ingleby and Poe Paddy with others, and many, many more landowners in favor of "keeping things the way they are," fearing that the region's infrastructure is already at its limit during peak hunting and fishing seasons, and that improving and branding the rail bed as a destination will bring too much publicity and too many strangers, destroying the tranquility and magical qualities of their real life Brigadoon.

While not necessarily living in this region, the "**outdoor recreation/tourism community**" is another socio-economic unit whose attitudes about the rail trail are very much tied to their livelihood, and therefore, generally in favor of the rail trail. This group, which in many cases overlaps with the alternative lifestyle community in this region, includes outfitters, fly fishing guides, liveries, bike shops, outdoor clothiers, and other tourism related businesses that stand to profit from outdoor recreation, such as B&B's, restaurants, cafes, convenience stores, brew pubs, gas stations, and tack and bridle shops.

PENNS & BRUSH VALLEYS RAIL TRAIL feasibility study
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If...
 ...a rail trail were to be built on or near the abandoned L&T railbed somewhere between Lemont & the County line east of Ingleby...

1. **How old are you?** 2. **My Age Group is:**
 Less than 20 20 to 30 30 to 40 40 to 50 50 to 60 Over 60

3. **I live in:** Penns Valley Brush Valley Other _____

TRAIL USERS PREFERENCES SURVEY

PENNS & BRUSH VALLEYS RAIL TRAIL FEASIBILITY STUDY
 Prepared by albertir vroman architecture LLC with Brian Auman, Landscape Architect for the Penns & Brush Valleys Rail Trail Study Committee

COMMENT: Please leave your responses in the box at this location-thank!!

4. **... what would you use the trail for?**
 Walking Biking Hiking Resting Fishing
 Commuting Teaching Access to Public Lands
 Horseback Riding Cross Country Skiing Other _____

5. **... how often would you use the trail?**
 Daily Weekly Occasionally _____ times/year (seasonal)

6. **... how many hours would you typically spend on the trail?**
 Less than 2 hours 2 to 4 hours More than 4 hours

7. **... how far would you typically travel on the trail?**
 Less than 2 miles 2 to 10 miles More than 10 miles

8. **... which of the following businesses might you use during your visit?**
 Cakes/Restaurants Boutiques/Guides Lodging (B&B, Hotel, etc.)
 Convenience Store Gas stations Other _____

9. **... how much money would you expect to spend on a typical trail visit?**
 Less than \$25 \$25 to \$50 \$50 to \$75 \$75 to \$100 \$100 plus

A group of local people are exploring the feasibility of establishing a rail trail in Penns and Brush Valleys on lands that have **willing owners, community support and public access**. This survey will be used to help determine the kind of interest and potential spending by people who might use the trail if a trail it is determined to be feasible.

You can learn more about this project by visiting us at:
www.centrocountypa.gov or by following us on Facebook at:
PENNS & BRUSH VALLEYS RAIL TRAIL FEASIBILITY STUDY

The Trail User Preferences Survey answered the question: "If a rail trail were to be built on or near the abandoned L&T railbed somewhere between Lemont and the county line east of Ingleby...what would you use the trail for, how often would you use it, how many hours would you typically spend on it, how far would you typically travel on the trail, which businesses might you use during your visit, and how much money would you expect to spend on a typical trail visit."

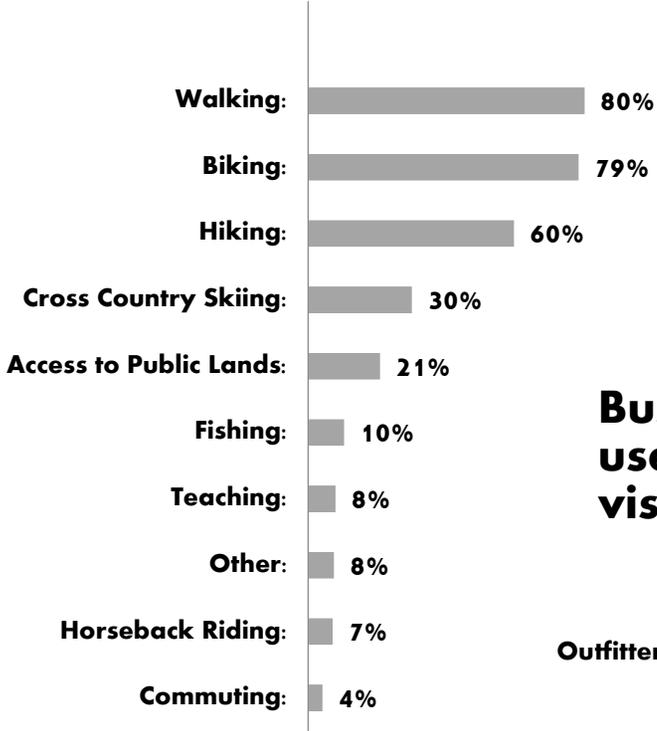
PENNS & BRUSH VALLEYS TRAIL USERS' PREFERENCE SURVEY

In order to get a sense of who might use the trail “if” it were built, we prepared a Trail User Preference Survey with 9 simple questions that we estimated it would take people 5 minutes or less to complete. We prefaced the questions with this statement, *“If a rail trail were to be built on or near the abandoned L&T railbed somewhere between Lemont and the county line east of Ingleby...what would you use the trail for, how often would you use it, how many hours would you typically spend on it, how far would you typically travel on the trail, which businesses might you use during your visit, and how much money would you expect to spend on a typical trail visit.”* We also asked them to include their name to make sure we did not get duplicates, to identify their age group to get a demographic profile of the users, and whether they lived in Penns Valley, Brush Valley, or some “other” place. We also left a space for them to fill in comments, and included a map of the route of the railbed through the county, and the following statement:

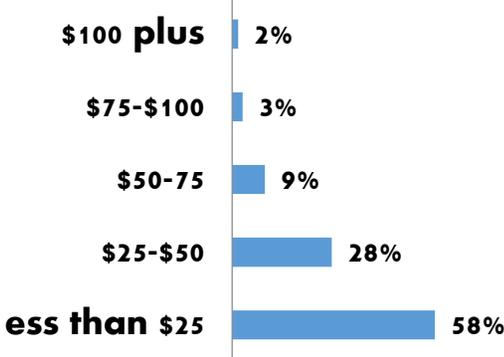
“A group of local people are exploring the feasibility of establishing a rail trail in Penns and Brush Valleys on lands that have **willing owners, community support, and public access**. This survey will be used to help determine the kind of interest and potential spending by people who might use the trail if a trail is determined to be feasible.”

We also listed the address of the Facebook page for the project, and the county website for people who wished to learn more about the project. We listed specific answers to choose from for every question to make it easy for them to check the answers that apply, and to make it possible for us to graph their responses. We also included an “other” category for questions where it made sense to do so. We collected the surveys in person so we could answer any questions they had about the survey. Many survey respondents said they appreciated having the checklist for the question, “what would you use the trail for,” because it helped them think of things they might not otherwise have considered, like “teaching” or “commuting.” We set up a booth to collect our Trail User Preference Surveys at three events that occurred over the spring and summer of 2013, including a website rollout for *Trail2Creek* at the Brementown Ballroom in Millheim, FarmFest in Centre Hall, and CrikFest in Coburn. We chose those 3 venues because we thought they would provide information from a community of potential trail users (the group we identified as the “alternative community” in the section above) with a high probability of actually using the trail.

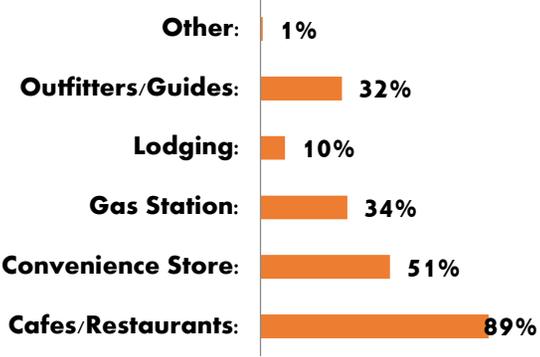
I would use the trail for:



\$ I would expect to spend per visit:



Businesses I might use during my visit:



244 people responded to our User Preference Survey and with few exceptions answered every question. The majority of responders (53% of 244 responses) listed their age as either 60 or over (29%) or 50 to 60 (24%), followed by 40 to 50 (17%), 30 to 40 (14%) 20-30 (11%) and less than 20 (3%). Most responders also listed Penns Valley as their home (44% of 244 responses), followed by the State College area (30%), other (24%), or Brush Valley (2%). In contrast to the Pine Creek and Buffalo Valley surveys which only recorded the activity the user was engaged in at the time of the survey, we listed 10 possible uses for people to check off (plus an “other” category) and encouraged respondents to check off all of the categories they thought they might use the trail for, resulting in 750 total responses by 244 people surveyed. The majority of potential users (195) believe they would use this trail for walking (80% of 244 users) and almost as many (192 of 244) said they would use the trail for biking (79%). 145 people said they would use the trail for hiking (59% of 244), 74 for cross country skiing (30% of 244), 50 for access to public lands (20% of 244), fishing (10% of 244), horseback riding (8%), teaching (8%), commuting (4%), and hunting (1%). Respondents who filled in the “Other” category (8%) listed birdwatching, observing nature, bike-paddle-shuttle, rollerblading, water sports, running, jogging, dog walking, and campgrounds.

Most users (58% of 245 responses) said they would use the trail occasionally, 37% would use it weekly, 4% daily, and 1% listed other. Most users (70% of 268) expected to spend 2 to 4 hours on the trail, 20% for less than 2 hours, and 10% for more than 4 hours. Two thirds of users (173 of 259) planned to travel less than 10 miles, 24% planned more than 10 miles, and 9% would use it for treks less than 10 miles.

The majority of potential users (89%) said they might visit a café or restaurant during their trail trip, 51% expected to use a convenience store, and 34% would fuel up at a gas station. Only 10% planned an overnight stay with lodging, but a surprisingly high percentage (31%) thought they might hire a guide or an outfitter. The majority of users (57%) also thought they would spend less than \$25 per visit, while 29% expected to spend \$25 to \$50, 10% expected to spend between \$50 and \$75, 3% expected to spend between \$75 and \$100, and only 2% expected to spend more than \$100.

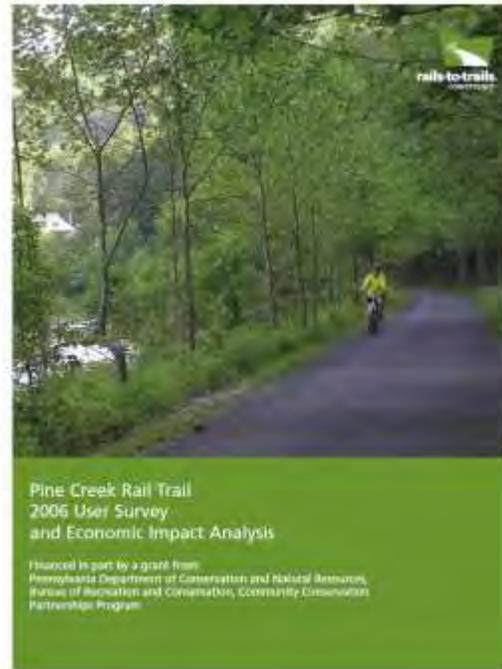
Buffalo Valley Rail Trail 2012 User Survey and Economic Impact Analysis



The authors of the Buffalo Valley Rail Trail User Survey estimate 100,000 user trips per year, which equates to about 30 people per mile per day on the trail.

THE BUFFALO VALLEY RAIL TRAIL, A 9.2 MILE COMMUNITY BASED TRAIL

The Buffalo Valley Rail Trail User Survey gives us a glimpse of actual user preferences of a community based trail at the east end of the L&T in a setting very similar to the Penns and Brush valley region. The survey was prepared by professors from Bucknell University. The West Shore Railroad Company operated the 9.2 mile section of the former Lewisburg and Tyrone Railroad between Lewisburg and Mifflinburg until 1997. In 2009, the Lewisburg Area Recreation Authority (LARA) acquired the rights of way from West Shore, which had attempted unsuccessfully to operate an excursion train, and secured federal funds to build the trail, which opened in November of 2011. According to the Bucknell study, 1,137 distinct users visited the Buffalo Valley Rail Trail (BVRT) an estimated 12,043 times in the month of June 2012. The report's authors used that data to project an estimate of 100,000 trips per year, which equates to 30 people per mile per day. The age of the average BVRT user is 48.8 years old and visits the trail about 10.59 times per month. The average user traveled about 5 miles to access the trail and spent an average of 86.85 minutes on the trail. Most trail users (30%) use the trail 1 to 2 times per week for biking (70%), walking (25%) and jogging (5%). Most trail users (50%) also said they use the trail for both weekdays and weekends, with most of them (67%) on the trail for between 30 minutes and 2 hours. Most of them (52%) drove to the trail, 30% biked and 15% walked there. About half (49%) of users access the trail from the Lewisburg Trailhead, 28% access the trail from the Mifflinburg Park Trailhead, and the remainder access the trail from other locations. The majority of trail users (67%) said they use the trail for the trail (i.e., recreational use), 22% use it to visit friends and family, and 8% use it to get to work or shop (3%). Most trail users (79%) said their usage does not involve an overnight stay, and of those who did 8% stayed at a hotel and the other 13% stayed with friends and family. None of the overnights reported staying at a B&B. First time users enjoyed the trail 11.77 times each month. Each mile of distance a person traveled to reach the trail reduced the number of visits by .22, so a person traveling 50 miles to access the trail would make 1.1 fewer visits per month than a person living adjacent to the trail. The Bucknell study estimated direct economic impacts of the trail from recreational purchases at \$280,925 annually. Using a spending multiplier to account for indirect and induced spending, the study's authors estimate the total annual impact in the Susquehanna Valley at \$477,572 and spending equivalent to \$589,942 per year in the Commonwealth.



The 62.2 mile long trail is probably the best known rail trail in the state. The Rail Trail Conservancy estimated that 125,000 people visited the trail in 2006, about 5.5 visitors per day per mile.

PINE CREEK RAIL TRAIL, A 62 MILE DESTINATION TYPE TRAIL

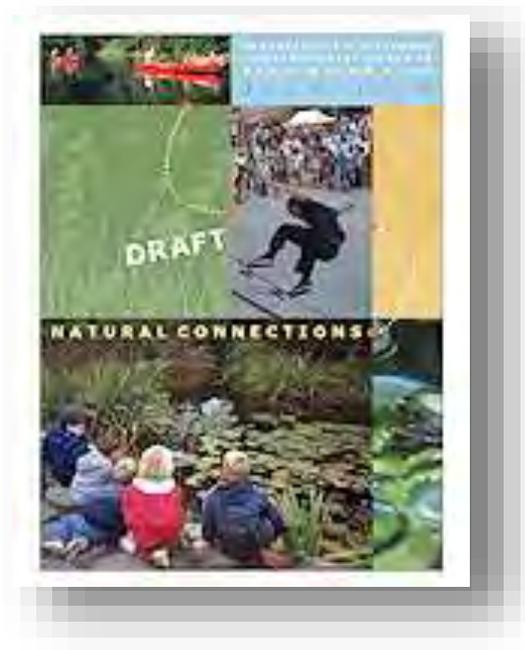
The Pine Creek Trail User Survey offers us a perspective on user preferences for a destination type trail. The survey was prepared by the Rails-To-Trails Conservancy in 2006 for PA-DCNR. The 62.2 mile long trail is probably the best known rail trail in the state. **USA Today** ranked it as one of the "10 great places to take a bike tour" in 2001. The trail traces its beginning to 1883, when the *Jersey Shore, Pine Creek and Buffalo Railway* opened for service (3 years before the L&T began service to Lemont). The railway became part of New York Central in 1914, and was taken over by CONRAIL in 1976 as part of the restructuring of the moribund Penn Central. CONRAIL filed for abandonment on July 25, 1988, and the ICC/STB granted the Commonwealth's request to remove the tracks and develop the railbed as an Interim Use Trail in accordance with the 1983 railbanking act. In July 1990, the state legislature approved the purchase of the railbed by quit claim deed for \$1 (Senate Bill 967). Construction of the first 19 mile section between Ansonia and Blackwell began in 1995 and opened in August 1996. An additional 23 miles was added in June of 2001 and the final leg was completed in 2006, connecting Pennsylvania's Grand Canyon to a trailhead on 1-99/SR220 at Jersey Shore. The Rail Trail Conservancy estimated that 125,000 people visited the trail in 2006, or about 5.5 visitors per day per mile. Most users (86%) came from Pennsylvania, 6% from 20 other states, and 5% from New York. Of those originating in Pennsylvania, the highest percentage (2%) came from Lycoming County, followed by Lancaster County (9%), neighboring Tioga (9%) Centre (7%) and Clinton (7%) counties, suggesting about half the trail users came from Lycoming or neighboring counties. Most users (42%) visited the trail a few times a year, another 12% visited a couple times a month, and 10% visited 1 or 2 times a week. Three quarters (74%) of users were over the age of 46, 29% 56-65, 28% 46-55; 17% 66 or older, and 15% 36-45. Only 12% were younger than 35, but 23% of users brought children 15 years or younger along on the trip, with 56% of them 10-15 years old, and 31% between 5 and 9 years of age. More than half of users (56%) were male. The majority of users (64%) came for biking, 24% for walking/hiking, 4% cross country skiing/snowshoeing, 3% jogging/running, and .4% horseback riding. Most (48%) used the trail weekdays and weekends, about a third (32%) used it just for weekends and 19% just on weekdays. Most users (49%) used the trail anytime, 28% used it in the morning, 20% in the afternoon, and 4% used it evenings. 63% spent more than 2 hours on the trail, 29% spent 1 to 2 hours; 8% spent 30 minutes to an hour, and .5% spent less than 30 minutes on the trail. Most visitors (58%) used the trail for recreation, 38% for health and exercise, 1% for fitness training, and .3% for commuting. Visitors watched wildlife (36%), birdwatched (32%); studied flowers (17%); fished (5%); canoed (4%); kayaked (3%), or tubed (3%). The average expenditure per night for the 373 respondents (about 1/3) who answered the question was \$69.08.



Based on visitations to comparable trails, we estimate demand for a 2 to 5 mile community based trail in Penns & Brush Valleys to be between 5 and 10 visitors per mile per day.

ESTIMATES OF USER DEMAND

While demographics provide context and surveys provide helpful guidance on trail usage and demand, usage and demand are driven by factors that, like real estate, are location specific. Trail demand and use are highly dependent on the location of trailheads and their proximity to users, the length of the trail, and the demographics and lifestyle preferences of the communities where the trail is located. Demand and use can also be influenced by the number of competing recreational options a community has to choose from. A destination type trail restricted to a remote area like the gap through the mountain beyond Coburn, with its high scenic value and world class reputation for trout fishing (e.g.; Green Drake Mayfly hatch) and mountain biking opportunities (e.g. Wilderness 101), might attract a similar number of visitors (5 people per mile per day) as the Pine Creek Trail, with its Grand Canyon and few other competing recreational choices. Likewise, a 5-10 mile long community based trail with a trailhead in Lemont might be expected to draw at least as many visitors as Lewisburg's 9.2 mile Buffalo Valley Rail Trail (30 people per mile per day) especially when you consider that the Centre Region's population of 92,096 residents is more than twice the size of Union County (pop. 44,949). But given that a 27 mile long destination type trail is not favored by the community at this time, and that shorter community based trails limited to the Penns/Brush valleys population (12,819 people, about half the size of the Buffalo Valley Trail community of 22,528 residents) are a more likely possibility at this time, we estimate demand for a 2 to 5 mile community based trail in Penns & Brush valleys to be between 5 and 10 visitors per mile per day. (For another comparison, the 16 mile Ghost Town Trail in Indiana, PA gets about 11 visitors per mile per day). Like the Pine Creek and Brush Valley trails, we would expect most people to use the trail for recreational purposes, like biking, hiking, walking and cross country skiing. We also would not ignore the high percentage of "potential trail users" from our survey who said they would use the trail for walking (80%) even though it is much higher than either the Buffalo Valley or Pine Creek surveys (25%). A recent (July 2012) Hunter College study, *Population Shifts and Implications for Walking in the United States*, notes "Major population shifts in the United States point to changes in American attitudes and behaviors regarding walking. These shifts are likely to result in a substantial increase in both recreational and utilitarian walking. Three demographic changes, in particular, are likely to promote this "walking revolution:" (1) the aging of the baby boomers, (2) the different transportation priorities of young people, and (3) the decline of the suburbs." Although the Penns Valley region is not expected to grow as fast as other regions of the county over the next decade, we do expect use of trails to increase faster than the population grows due to those trends.



According to a survey of 10,000 Pennsylvanian's included in the **PA Statewide Comprehensive Outdoor Recreation Plan**, $\frac{3}{4}$ of the respondents listed walking as their primary outdoor activity,