

**Trail Town Economic Impact Study
(Phase 1: Business Survey)**

**For
The Progress Fund
and
Laurel Highlands Visitors Bureau**

Job #07-294a

November 17, 2008

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Background and Methodology

Background and Objectives

The Trail Town Program, Laurel Highlands Visitors Bureau (LHVB), and Allegheny Trail Alliance (ATA) contracted Campos Inc to conduct three phases of research:

- Phase I, economic impact research among businesses located on and around the trail
- Phase II, marketing research among trail users, to be conducted throughout 2008
- Phase III, economic impact research, among businesses in 2009

This study was undertaken to update data from a 2005 economic impact study. However, the previous study was conducted at a time when the trail was not yet completed.

This Phase I report highlights 2007 Economic Impact Research (Phase I) which was aimed to address the following objectives:

- To obtain gross sales revenue from trail side and trail-related businesses for 2006 and 2007.
- To determine if businesses expanded operations in the past year and/or if they have plans to expand in the upcoming year.
- To determine if businesses created new employee positions in the past year and/or if they have plans to add positions in the upcoming year.
- To identify other actions or indicators that may have occurred as a direct result of the revitalization around the completion of the Great Allegheny Passage.

Methodology

Campos Inc designed the survey instrument with input and approval from the Progress Fund, LHVB, and ATA. A few questions from the previous study were included in the current study to track changes over time. Comparisons were made where possible.

Utilizing a multimodal data collection methodology, mail, web, and telephone interviews, 117 businesses were surveyed (58 via mail; 30 via online; and 29 via phone) between March 17, 2008 and April 24, 2008. The survey took approximately 8 minutes to complete online and about 10.5 minutes to complete via phone.

Approximately 500 businesses were initially invited to participate in the survey through standard mail. The enclosed invitation contained a brief description of the project and a link to access the online survey.

Approximately two weeks following the initial mailing, Campos Inc began to call businesses that had not yet completed the survey. Those willing and available were surveyed over the phone. Respondents that preferred to complete the survey in a manner other than by phone were presented the options of receiving the link to the survey site by mail, fax, or email.

All completed interviews were edited, coded, computer tabulated, and analyzed by Campos Inc.

A copy of the questionnaire can be found in the Appendix.

Analytical Notes

- For this study, the total sample size of 117 yielded results with a statistical accuracy of $\pm 7.9\%$ at the 95% confidence level. This means that there is a 1 in 20 chance that the "true" measurement will fall outside of this range.
- Where appropriate, subgroup analysis was conducted to determine significant differences between both *business type* and *county location*.
- Due to small sample sizes, caution should be used when interpreting the results of subgroup analysis. While subgroups may be too small to draw statistically valid conclusions, patterns may emerge that can be useful.
- Throughout the report, percentages may not add to 100% because of rounding and/or multiple responses.
- The term *net* is used in some tables in this report. *Net* is the summary of a group of related responses and represents the percentage of *respondents* who made one or more comments in that category/group.
- *Base* is the number of respondents who were asked a particular question. At times, questions are skipped by some respondents based on their answers to previous questions.
- A *top-two box* score refers to the two highest responses on a rating scale (for example, *excellent* and *very good*), that have been combined for reporting purposes.
- Several tables throughout the report show only the most frequently mentioned responses. For a complete listing of responses, please refer to Computer Tables, furnished under a separate cover.



Executive Summary

Key Findings

In 1998, while the trail system was still under construction, important economic information was gathered from 89 businesses operating either along or in close proximity to one of the five major trail sections. In addition to a slightly more extensive survey instrument, the 2007 business study was administered to a larger and broader audience. While the 1998 study was collected within a similar geographic footprint, the trail system and the towns through which it passed were not yet fully developed, translating into fewer businesses to contribute to the sample.

Total Analysis - 2007 Business Study

This summary will present findings in several key areas:

- Gross sales/revenue and trail attributed revenue percentage
- Perceived economic impact
- Trail influenced expansions and/or additions
- Respondent profile

Gross Sales/Revenue and Trail Attributed Revenue Percentage

The majority of the respondents refused to disclose or could not recall their gross revenue figures (59.0%, 2006; 52.1%, 2007).

Despite the fact that the average revenue figures reported for the 2006 and 2007 fiscal years were similar among the total sample (\$771,522 and \$773,310, respectively), substantial fluctuations in gross revenue were reported within several subgroups:

- Compared to 2006, average gross revenue for 2007 increased by:
 - 18.8% among outdoor/trail related businesses
 - 17.6% among businesses located in Westmoreland County, PA
 - 16.2% among businesses located in Somerset County, PA.

See tables on the following page.

Executive Summary

2006 vs. 2007 Average Gross Revenue (Business Type)

	Business Type					
	Total	Lodging	Restaurant	Retail	Outdoor/ Trail Business	Other
Bases:	55	22*	11*	7*	9*	6*
2006 gross revenue	\$771,522	\$834,624	\$402,871	\$1,715,462	\$398,000	\$472,400
2007 gross revenue	\$773,310	\$855,472	\$411,303	\$1,603,929	\$472,666	\$479,204
% difference	0.2%	2.5%	2.1%	-6.5%	18.8%	1.4%

*Caution: small base sizes

2006 vs. 2007 Average Gross Revenue (County)

	County					
	Total	Allegheny, PA	West- moreland, PA	Fayette, PA	Somerset, PA	Allegany, MD
Bases:	55	7*	6*	10*	9*	9*
2006 gross revenue	\$771,522	\$1,680,167	\$402,333	\$380,000	\$395,758	\$401,971
2007 gross revenue	\$773,310	\$1,706,032	\$473,000	\$406,550	\$459,835	\$378,222
% difference	0.2%	1.5%	17.6%	7.0%	16.2%	-5.9%

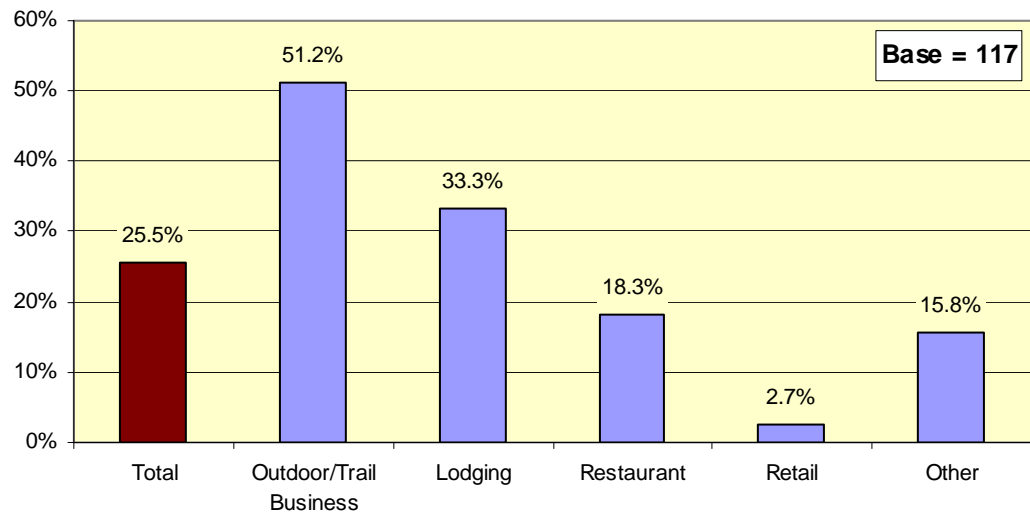
*Caution: small base sizes

Clearly exemplifying the economic contribution of trail users, respondents estimated that on average one-quarter (25.5%) of the business they received in 2007 could be attributed to the existence of the area's biking/hiking trail.

- The largest percentage estimates, regarding the attributable contributions of trail users to 2007 annual business, were observed among:
 - Outdoor/trail related businesses (51.2%)
 - Lodging/hotel establishments (33.3%)
 - Businesses located in Westmoreland County, PA (48.4%)
(not displayed in the following graph)
 - Businesses located in Somerset County, PA (33.0%)
(not displayed in the following graph)

See graph on the following page.

Trail Attributed Revenue Percentage



Perceived Economic Impact

Since many variables possess the ability to impact a business's gross revenue and customer base, respondents were asked to specifically estimate the level to which the trail system impacted their respective businesses in the past year.

In yet another display of positive impact, the majority (64.4%) of the total respondents reported that their sales/revenue had *increased at least somewhat* as a direct result of the trail.

- Even more impressive, over three-quarters of the respondents from the following subgroups each mentioned experiencing *at least somewhat of an increase* in sales/revenue.
 - Outdoor/trail related businesses (84.6%)
 - Restaurants (79.2%)
 - Businesses located in Somerset County, PA (87.5%)
(not shown in the following table)
- Although not quite as dramatic, over two-thirds of the following subgroups experienced *at least somewhat of an increase* in their sales/revenue.
 - Lodging/hotel establishments (65.7%)
 - Businesses located in Allegany County, MD (73.7%)
(not shown in the following table)
 - Businesses located in Fayette County, PA (64.3%)
(not shown in the following table)

See table on the following page.

Economic Impact of Trail

	Business Type					
	Total	Lodging	Rest- aurant	Retail	Outdoor/ Trail Business	Other
Bases:	101	35*	24*	21*	13*	8*
Increased revenue significantly or somewhat	64.4%	65.7%	79.2%	38.1%	84.6%	50.0%
Decreased revenue significantly or somewhat	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Has had no impact	35.6%	34.3%	20.8%	61.9%	15.4%	50.0%

*Caution: small base sizes

Trail Influenced Expansions/Additions

If a business is fortunate enough to mature to the point that it is considering expanding its current operation, the odds are high that several extremely important decisions have been made correctly along the way. One of the earliest, and most vital, is choosing a viable location.

The positive economic influence of the trail system was exhibited once again; this time by the fact that the majority (62.4%) of the total respondents credited the trail with having *at least some influence* on the location of their business.

- Over three-quarters of both restaurants and outdoor/trail related businesses each recognized the trail system for having *at least some influence* on the location of their businesses (80.8% and 76.5%, respectively).

Even though the majority of the respondents on average reported that they have not made any changes, the existence and proximity of the trail not only influenced several businesses to make *expansions/additions* to their *products, services, and/or facilities* but also caused them to *modify their staffing and/or advertising practices*.

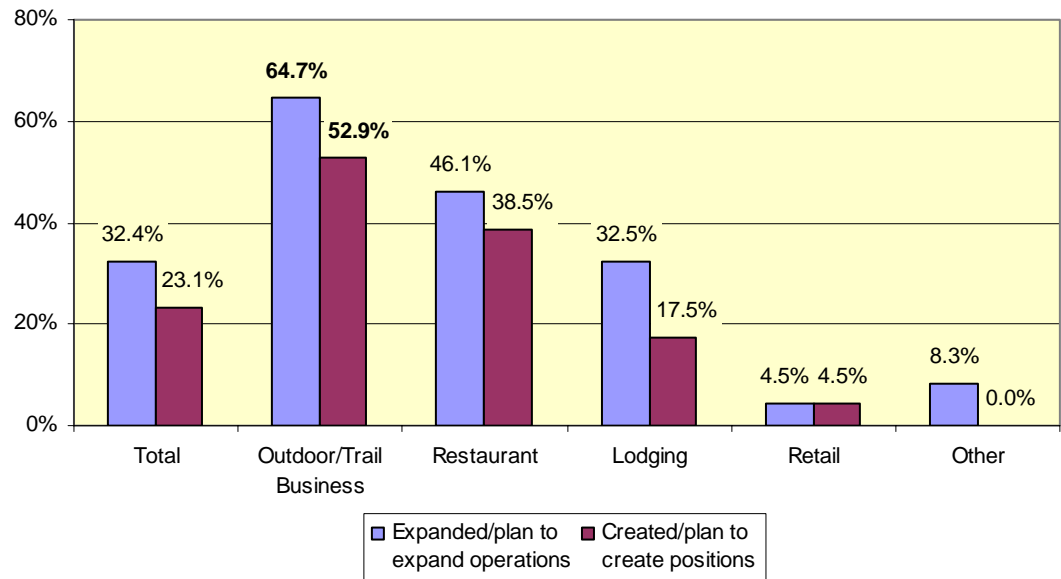
- Outdoor/trail related businesses once again deviated from the trends observed among the total sample with significantly fewer respondents reporting *no changes*.

See graph on the following page.

Executive Summary

- In fact, the majority of the outdoor/trail related businesses reported that they were *making plans to either expand their operations and/or create new positions* if they had not done so already.

Trail Influenced Expansions/Additions



The vast majority (92.1%) of the respondents that had reported expanding or making plans to expand current operations were *focusing on their current business locations*.

- Three in ten (29.1%) mentioned *making/planning to make additions/modifications to services*; particularly popular was the offering of a *shuttle service* to patrons.
 - *Shuttle services* were especially prevalent among outdoor/trail related businesses, lodging/hotel establishments, and businesses located in Westmoreland County, PA (52.9%, 35.0%, and 30.0% respectively).
- Slightly more than one-quarter (27.4%) of the respondents reported investing in additional *advertising*, primarily by either *placing ads in publications/trail books* and/or *placing signs on the trail* (14.5% and 7.7%, respectively).
 - Restaurants were significantly more active in *advertising* than all other business types (53.8% vs. 8.3%-23.5%, respectively)
 - *Placing ads in publications/trail books* was particularly popular among businesses located in Allegany County, MD and Somerset County, PA (35.0% and 27.8%, respectively).

Executive Summary

- Approximately one in five (21.4%) of the respondents mentioned *expanding/improving facilities*, mainly by providing patrons with *convenient equipment/facilities to park or store their bicycles* (6.0%).
 - Outdoor/trail related businesses, restaurants, and lodging/hotel establishments were all particularly active in this regard (41.2%, 34.6%, and 20.0%, respectively)

In order to accommodate the trail user customer base, many of the businesses located along the trail offered *shipping services* for products purchased from their store.

- Of the 22 respondents that described their business as either a *retail/gift/specialty store* or *bike shop*, the majority (68.2%) reported *offering shipping services* to their customers.

Respondent Profile

The majority (70.0%) of the respondents reported that their business was located in one of the five primary counties through which the trail passes: *Allegheny, Westmoreland, Fayette, and Somerset Counties in Pennsylvania and Allegany County in Maryland*. Excluding *Westmoreland County, PA* (8.5%) which was slightly lower, a similar number of businesses were located in all other counties (14.5% - 17.1%).

Approximately one-third (34.2%) of the respondents described their business as either a *hotel/motel/B&B* or a *campground*, while about one in five each mentioned operating either a *restaurant/café/ice cream shop* or a *retail business/store* (22.2% and 18.8%, respectively). *Outdoor/trail related businesses*, including *bike rentals/sales/supplies*, were cited by one in seven respondents (14.5%) and the remaining 10.3% represented some *other* business type.

On average, respondents reported operating businesses at their current locations for 18.6 years; this was influenced primarily by the majority (58.1%) of respondents that cited either *3-10 years* (32.5%) or *11-20 years* (25.6%). About one in eight businesses each reported operating at their current locations for either *1-2 years*, *21-40 years*, or *more than 40 years* (12.8%, 12.0%, and 13.7%, respectively).

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When asked to select their peak sales months, slightly less than half (46.2%) of the respondents chose the months of *bike season* (April to October). This was followed closely by one-third (33.3%) that exclusively selected the *Summer* months (June, July, and August).

- One in twenty (5.1%) of the respondents reported that they did not experience any peak sales months or only selected a single month.

Selection of respondents' off-peak sales months was varied.

- One-quarter (25.6%) reported an off-peak season ranging from *Fall to Spring*, followed closely by one in five (20.5%) that exclusively selected the *winter* months (December, January, and February). The only other seasonal range selected by more than one in ten respondents was *Winter to Spring* (15.4%).
- One in ten (10.3%) respondents reported that they did not experience any off-peak sales months or only selected a single month.

On average, full-time employees worked 44.2 hours per week during *peak* sales months and 37.0 hours per week during *off-peak* sales months while part-time employees (across all business types) worked 23.1 hours per week during *peak* sales months and 19.3 hours during *off-peak* sales months.

- The total averages, regarding hours worked per week, were similar across all business types, regardless of which type/season of employment combination is being considered.

Among the total sample, the number of full-time employees staffed during *peak* sales months was reduced, on average, by 36% for the *off-peak* months.

However, this average was not similar across all business types:

- On average, *outdoor/trail related businesses* cut a significantly larger portion of the *peak* sales season staff (78%), while *retail businesses/stores* only reduced their staff size by 9%.

Again, among the total sample, the number of part-time employees staffed during *peak* sales months was reduced, on average, by 40% for the *off-peak* season. However, this average was not similar across all business types:

- On average, *outdoor/trail related businesses* cut a significantly larger portion of the *peak* sales season staff (59%), while *retail businesses/stores* only reduced their staff size by 16%.

See table on the following page.

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Seasonal Staffing Trends by Business Type (Average Number of Employees)

		Business Type					
		Total	Lodging	Rest- aurant	Retail	Outdoor/ Trail Business	Other
Bases:		117	40*	26*	22*	17*	12*
Full-time staff	Peak-season	23.7	37.3	5.4	8.5	11.3	60.3
	Off-Peak season	15.1	26.3	4.0	7.7	2.5	25.3
	<i>% reduction</i>	-36%	-30%	-26%	-9%	-78%	-58%
Part-time staff	Peak-season	20.5	42.2	9.2	13.9	7.6	18.5
	Off-Peak season	12.3	21.6	6.2	11.7	3.1	13.0
	<i>% reduction</i>	-40%	-49%	-32%	-16%	-59%	-30%

*Caution: small base sizes

Conclusions and Recommendations

Overall, respondents' perceptions of the trail system were fairly favorable and the majority of them mentioned that the trail is having a positive economic impact on their respective business.

When adjusting for those businesses that did not respond, estimated receipts for 2007 total \$12,044,071. Now it must be noted that adjustments were made by grouping all of the businesses surveyed by business type and using those results to estimate the results of those businesses that did not respond. This assumes that the businesses within each group that did not respond have receipt and wage totals that were the same as the receipt and wage totals of the businesses that did respond within that group. The adjusted results, because they are based on a relatively small sample, can only be used to estimate the total businesses activity along the trail.

Regardless of the decreases in total calculated receipts, reported gross revenue displayed slight to significant increases from 2006 to 2007 across all business types except retail; among outdoor/trail related businesses.

Nearly two-thirds of the respondents admitted that the trail had at least some influence on their choice of a viable location for their business.

- An undeniable display of positive economic influence occurred specifically among the restaurants and outdoor/trail related businesses; each had more than three quarters of their respondents both credit the trail as having at least some influence on location and report at least some increase in gross revenue.

In addition to revenue and influence on location, nearly one-third (32.4%) of respondents reported that they have or plan to expand their operations within the next year because of impact felt from the trail. This was again led by the outdoor/trail related businesses (64.7%), restaurants (46.1%), and this time also included lodging/hotel establishments (32.5%).

Many of the businesses reported additions such as shuttle services and bike racks to their operations or facilities. Others reported investing more heavily in advertising or increasing staff. Regardless of the act, the point to be taken away is that the trail is not only positively affecting these businesses and towns on the whole, but is doing so with such great proficiency that it is motivating them to

Executive Summary

expand their current list of operations and obligations. Furthermore, the average wage expenditure confirms that these businesses are stimulating these economies by putting \$629,891 worth of wages back into the surrounding trail communities.

The promotion of such success, through either testimonials in trail books/ magazines or other vehicles such as the website, should be exemplified as to attract additional business to the trail towns or encourage current businesses to further embrace the trail system and its possibilities.

Next year's 2009 study will collect 2007 data and will allow us to display a 3-year revenue trend. With dramatic differences observed from 2006 to 2007 in certain business types it is important to promote the 2009 survey among local businesses and to collect as many businesses contacts as possible. The fact that the profiles of the trail towns and trail businesses are continually evolving, sometimes even independent of the trail, means contact lists must be continuously updated.

A possible way to raise participation among local trail-businesses would be to explain the ultimate goal of the research; to benefit not only the trail system as a whole but also the trail towns and businesses through/by which it passes. The value of the information they have available to them for merely taking 10 minutes of their time to complete a survey needs to be better explained. By participating in the study, and requesting a copy of both the economic impact and trail user findings, they are essentially receiving free market research. These studies will provide both business climate indicators and key customer profile information.



Research Results

Research Results

Q#1 What is the primary classification of this business location?

Note: Q1 was asked of all respondents.

Type of Business

	Total
Bases:	117
(Net) Lodging	34.2%
-Hotel/motel/B&B	24.8%
-Campgrounds	7.7%
Restaurant/tavern/café/ice cream shop	22.2%
(Net) Retail	18.8%
-Retail/gift/specialty store	11.1%
-Convenience/grocery store	6.8%
(Net) Outdoor/Trail related businesses	14.5%
-Bike rental/sales/supplies	7.7%
-Outdoor recreation/outfitter	6.0%
(Net) Attractions	6.8%

Q#2 How long have you been in business in this location?

Note: Q2 was asked of all respondents.

Age of Business

	Business Type					
	Total	Lodging	Rest- aurant	Retail	Outdoor/ Trail Business	Other
Bases:	117	40*	26*	22*	17*	12*
Less than a year	2.6%	2.5%	0.0%	0.0%	11.8%	0.0%
1-2 years	14.5%	12.5%	26.9%	13.6%	11.8%	0.0%
3-5 years	13.7%	15.0%	26.9%	4.5%	5.9%	8.3%
6-10 years	17.9%	20.0%	19.2%	13.6%	11.8%	25.0%
11-20 years	24.8%	20.0%	15.4%	45.5%	17.6%	33.3%
21-40 years	12.0%	12.5%	3.8%	9.1%	35.3%	0.0%
More than 40 years	13.7%	15.0%	7.7%	13.6%	5.9%	33.3%
Not applicable	0.9%	2.5%	0.0%	0.0%	0.0%	0.0%
Mean (years)	18.6	18.4	11.6	21.3	16.5	32.4

*Caution: small base sizes

Values highlighted in were significantly higher than the values highlighted in .

Research Results

Peak Season

Q#3a

What months of the year do you consider to be your peak season months?

Note: Q3a was asked of all respondents.

	Business Type					
	Total	Lodging	Rest- aurant	Retail	Outdoor/ Trail Business	Other
Bases:	117	40*	26*	22*	17*	12*
(Net) Spring	54.7%	57.5%	50.0%	63.6%	47.1%	50.0%
-March	12.8%	7.5%	11.5%	22.7%	17.6%	8.3%
-April	29.9%	27.5%	15.4%	45.5%	41.2%	25.0%
-May	49.6%	55.0%	46.2%	45.5%	47.1%	50.0%
(Net) Summer	87.2%	95.0%	88.5%	63.6%	100.0%	83.3%
-June	80.3%	95.0%	69.2%	59.1%	88.2%	83.3%
-July	81.2%	95.0%	73.1%	54.5%	94.1%	83.3%
-August	78.6%	87.5%	80.8%	54.5%	88.2%	75.0%
(Net) Fall	69.2%	75.0%	76.9%	68.2%	52.9%	58.3%
-September	61.5%	67.5%	73.1%	45.5%	52.9%	58.3%
-October	47.9%	65.0%	50.0%	36.4%	29.4%	33.3%
-November	17.1%	10.0%	11.5%	40.9%	11.8%	16.7%
(Net) Winter	18.8%	5.0%	19.2%	50.0%	11.8%	16.7%
-December	15.4%	2.5%	15.4%	45.5%	11.8%	8.3%
-January	6.8%	5.0%	3.8%	18.2%	0.0%	8.3%
-February	7.7%	5.0%	7.7%	13.6%	0.0%	16.7%

*Caution: small base sizes

Values highlighted in were significantly higher than the values highlighted in .

Research Results

Off-peak Season

Q#3b

What months of the year do you consider to be your off-peak season months?

Note: Q3b was asked of all respondents.

	Business Type					
	Total	Lodging	Rest-aurant	Retail	Outdoor/ Trail Business	Other
Bases:	117	40*	26*	22*	17*	12*
(Net) Spring	67.5%	85.0%	57.7%	63.6%	64.7%	41.7%
-March	57.3%	75.0%	57.7%	45.5%	47.1%	33.3%
-April	32.5%	40.0%	34.6%	18.2%	29.4%	33.3%
-May	18.8%	20.0%	11.5%	22.7%	17.6%	25.0%
(Net) Summer	10.3%	2.5%	15.4%	31.8%	0.0%	0.0%
-June	6.8%	0.0%	7.7%	27.3%	0.0%	0.0%
-July	6.0%	0.0%	7.7%	22.7%	0.0%	0.0%
-August	5.1%	2.5%	7.7%	13.6%	0.0%	0.0%
(Net) Fall	55.6%	70.0%	57.7%	22.7%	64.7%	50.0%
-September	10.3%	7.5%	7.7%	9.1%	11.8%	25.0%
-October	19.7%	17.5%	19.2%	9.1%	35.3%	25.0%
-November	48.7%	62.5%	57.7%	18.2%	47.1%	41.7%
(Net) Winter	81.2%	82.5%	88.5%	77.3%	70.6%	83.3%
-December	58.1%	72.5%	57.7%	22.7%	52.9%	83.3%
-January	78.6%	82.5%	88.5%	77.3%	70.6%	58.3%
-February	72.6%	80.0%	76.9%	68.2%	64.7%	58.3%

***Caution: small base sizes**

Values highlighted in were significantly higher than the values highlighted in .

Research Results

Q#3c

Is your business closed for more than 2 weeks in any given month during the year?

Note: Q3c was asked of all respondents.

Bases:

Total=117

Lodging=40*

Restaurant=26*

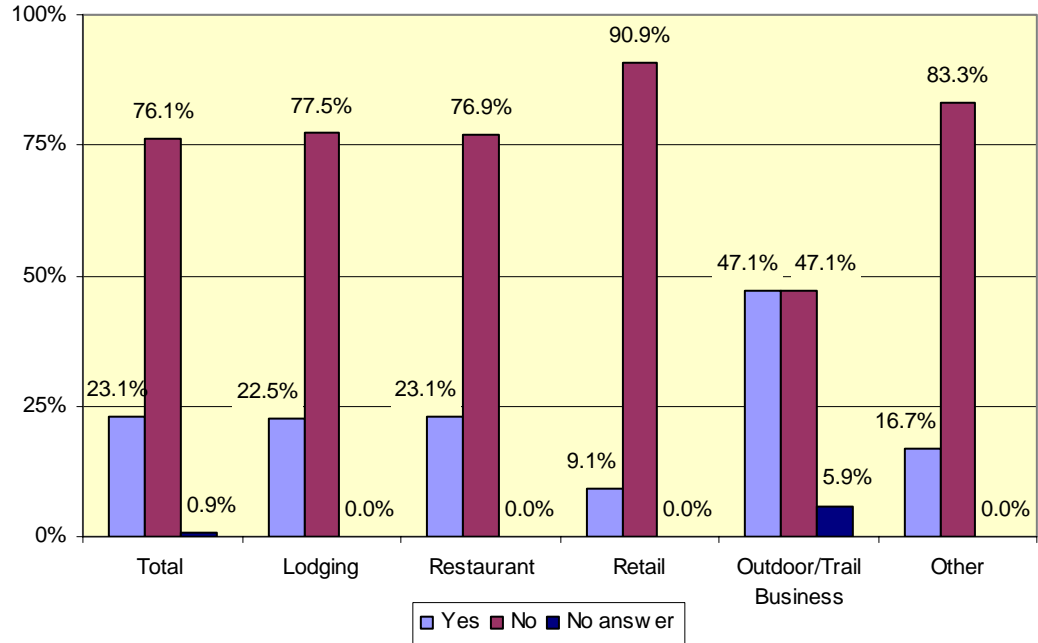
Retail=22*

Outdoor/Trail Business=17*

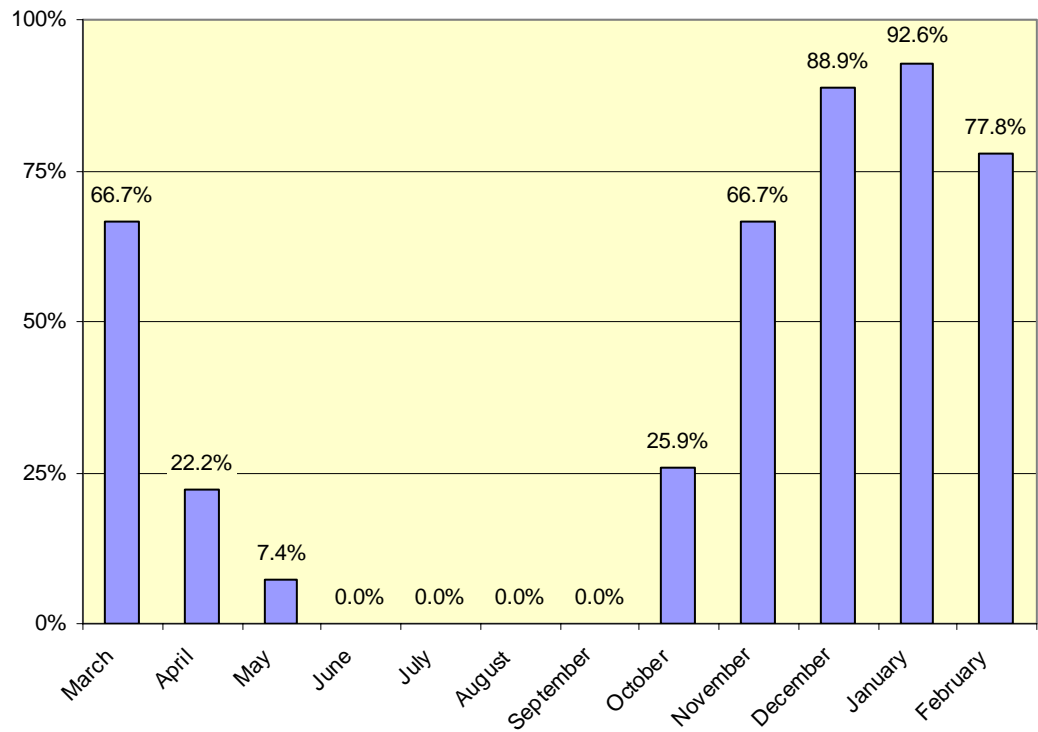
Other=12*

*Caution: small base sizes

Seasonal Closing



Months Closed



Q#3d

If yes, which months?

Note: Q3d was asked of respondents that reported closing their business for more than 2 weeks during the year.

Research Results

Full-Time Employees – Peak Season

Q#4a.1

How many persons, including yourself, if appropriate, do you employ full-time during peak season?

Note: Q4a1 was asked of all respondents.

	Business Type					
	Total	Lodging	Rest-aurant	Retail	Outdoor/Trail Business	Other
Bases:	117	40*	26*	22*	17*	12*
1 to 5 people	47.9%	47.5%	53.8%	31.8%	70.6%	33.3%
6 to 10 people	13.7%	10.0%	15.4%	22.7%	0.0%	25.0%
11 to 25 people	13.7%	7.5%	15.4%	22.7%	5.9%	25.0%
More than 25 people	8.5%	12.5%	0.0%	4.5%	11.8%	16.7%
Not applicable	16.2%	22.5%	15.4%	18.2%	11.8%	0.0%
<i>Mean</i>	23.7	37.3	5.4	8.5	11.3	60.3

***Caution: small base sizes**

Values highlighted in were significantly higher than the values highlighted in .

Part-Time Employees – Peak Season

Q#4a2

How many persons, including yourself, if appropriate, do you employ part-time during peak season?

Note: Q4a2 was asked of all respondents.

	Business Type					
	Total	Lodging	Rest-aurant	Retail	Outdoor/Trail Business	Other
Bases:	117	40*	26*	22*	17*	12*
1 to 5 people	40.2%	32.5%	50.0%	40.9%	52.9%	25.0%
6 to 10 people	16.2%	10.0%	23.1%	13.6%	17.6%	25.0%
11 to 25 people	10.3%	12.5%	11.5%	13.6%	5.9%	0.0%
More than 25 people	7.7%	10.0%	3.8%	4.5%	5.9%	16.7%
Not applicable	25.6%	35.0%	11.5%	27.3%	17.6%	33.3%
<i>Mean</i>	20.5	42.2	9.2	13.9	7.6	18.5

***Caution: small base sizes**

Values highlighted in were significantly higher than the values highlighted in .

Research Results

Full-Time Employees – Off-Peak Season

Q#4b.1

How many persons, including yourself, if appropriate, do you employ full-time during off-peak season?

Note: Q4b1 was asked of all respondents.

	Business Type					
	Total	Lodging	Rest-aurant	Retail	Outdoor/ Trail Business	Other
Bases:	117	40*	26*	22*	17*	12*
1 to 5 people	49.6%	52.5%	53.8%	40.9%	58.8%	33.3%
6 to 10 people	11.1%	10.0%	3.8%	13.6%	5.9%	33.3%
11 to 25 people	9.4%	7.5%	7.7%	22.7%	0.0%	8.3%
More than 25 people	5.1%	10.0%	0.0%	4.5%	0.0%	8.3%
Not applicable	24.8%	20.0%	34.6%	18.2%	35.3%	16.7%
<i>Mean</i>	15.1	26.3	4.0	7.7	2.5	25.3

*Caution: small base sizes

Values highlighted in were significantly higher than the values highlighted in .

Part-Time Employees – Off-Peak Season

Q#4b.2

How many persons, including yourself, if appropriate, do you employ part-time during off-peak season?

Note: Q4b.2 was asked of all respondents.

	Business Type					
	Total	Lodging	Rest-aurant	Retail	Outdoor/ Trail Business	Other
Bases:	117	40*	26*	22*	17*	12*
1 to 5 people	37.6%	30.0%	50.0%	36.4%	35.3%	41.7%
6 to 10 people	7.7%	7.5%	7.7%	9.1%	5.9%	8.3%
11 to 25 people	6.8%	7.5%	7.7%	13.6%	0.0%	0.0%
More than 25 people	3.4%	2.5%	3.8%	4.5%	0.0%	8.3%
Not applicable	44.4%	52.5%	30.8%	36.4%	58.8%	41.7%
<i>Mean</i>	12.3	21.6	6.2	11.7	3.1	13.0

*Caution: small base sizes

Values highlighted in were significantly higher than the values highlighted in .

Research Results

Average Full-Time Hours – Peak Season

	Business Type					
	Total	Lodging	Rest- aurant	Retail	Outdoor/ Trail Business	Other
Bases:	117	40*	26*	22*	17*	12*
15 hours or less	21.4%	32.5%	23.1%	18.2%	11.8%	0.0%
16 to 30 hours	6.0%	7.5%	7.7%	0.0%	0.0%	16.7%
31 to 40 hours	51.3%	42.5%	53.8%	72.7%	35.3%	58.3%
More than 40 hours	20.5%	15.0%	15.4%	9.1%	52.9%	25.0%
<i>Mean</i>	44.2	48.3	38.1	39.6	54.2	40.1

*Caution: small base sizes

Values highlighted in were significantly higher than the values highlighted in .

Q#5a.1

On average, how many hours per week does the typical employee work full-time during peak season?

Note: Q5a1 was asked of all respondents.

Average Part-time Hours – Peak Season

	Business Type					
	Total	Lodging	Rest- aurant	Retail	Outdoor/ Trail Business	Other
Bases:	117	40*	26*	22*	17*	12*
15 hours or less	39.3%	50.0%	26.9%	27.3%	47.1%	41.7%
16 to 30 hours	53.8%	45.0%	73.1%	54.5%	47.1%	50.0%
31 to 40 hours	6.0%	5.0%	0.0%	18.2%	5.9%	0.0%
More than 40 hours	0.9%	0.0%	0.0%	0.0%	0.0%	8.3%
<i>Mean</i>	23.1	23.2	21.9	24.4	20.9	26.6

*Caution: small base sizes

Values highlighted in were significantly higher than the values highlighted in .

Q#5a2

On average, how many hours per week does the typical employee work part-time during peak season?

Note: Q5a2 was asked of all respondents.

Research Results

Average Full-Time Hours – Off-Peak Season

	Business Type					
	Total	Lodging	Rest- aurant	Retail	Outdoor/ Trail Business	Other
Bases:	117	40*	26*	22*	17*	12*
15 hours or less	33.3%	40.0%	42.3%	18.2%	41.2%	8.3%
16 to 30 hours	9.4%	12.5%	15.4%	0.0%	5.9%	8.3%
31 to 40 hours	51.3%	42.5%	34.6%	77.3%	41.2%	83.3%
More than 40 hours	6.0%	5.0%	7.7%	4.5%	11.8%	0.0%
<i>Mean</i>	37.0	35.7	36.7	38.9	39.6	35.5

*Caution: small base sizes

Values highlighted in were significantly higher than the values highlighted in .

Q#5b.1

On average, how many hours per week does the typical employee work full-time during off-peak season?

Note: Q5b1 was asked of all respondents.

Average Part-time Hours – Off-Peak Season

	Business Type					
	Total	Lodging	Rest- aurant	Retail	Outdoor/ Trail Business	Other
Bases:	117	40*	26*	22*	17*	12*
15 hours or less	63.2%	72.5%	46.2%	45.5%	88.2%	66.7%
16 to 30 hours	32.5%	27.5%	53.8%	40.9%	11.8%	16.7%
31 to 40 hours	4.3%	0.0%	0.0%	13.6%	0.0%	16.7%
More than 40 hours	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<i>Mean</i>	19.3	17.4	19.1	22.7	14.1	23.3

*Caution: small base sizes

Values highlighted in were significantly higher than the values highlighted in .

Q#5b2

On average, how many hours per week does the typical employee work part-time during off-peak season?

Note: Q5b2 was asked of all respondents.

Research Results

Influence of Trail on Location of Business

Q#6

What impact did the trail have on the location of your business?

Note: Q6 was asked of all respondents.

	Business Type					
	Total	Lodging	Rest- aurant	Retail	Outdoor/ Trail Business	Other
Bases:	117	40*	26*	22*	17*	12*
(Net) At least some influence	62.4%	52.5%	80.8%	54.5%	76.5%	50.0%
-Very strong influence	23.1%	27.5%	19.2%	9.1%	41.2%	16.7%
-Strong influence	12.0%	7.5%	15.4%	13.6%	23.5%	0.0%
-Some influence	27.4%	17.5%	46.2%	31.8%	11.8%	33.3%
No influence	37.6%	47.5%	19.2%	45.5%	23.5%	50.0%

*Caution: small base sizes

Values highlighted in were significantly higher than the values highlighted in .

Impact of Trail on Business in Past Year

Q#7

What impact has the trail system had on this business location in the past year?

Note: Q7 was asked of all respondents. Not-applicable/don't know responses were removed from the base.

	Business Type					
	Total	Lodging	Rest- aurant	Retail	Outdoor/ Trail Business	Other
Bases:	101	35*	24*	21*	13*	8*
Increased revenue significantly	17.8%	25.7%	16.7%	0.0%	38.5%	0.0%
Increased revenue somewhat	46.5%	40.0%	62.5%	38.1%	46.2%	50.0%
Top-two box	64.4%	65.7%	79.2%	38.1%	84.6%	50.0%
Decreased revenue somewhat	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Decreased revenue significantly	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Has had no impact	35.6%	34.3%	20.8%	61.9%	15.4%	50.0%

*Caution: small base sizes

Values highlighted in were significantly higher than the values highlighted in .

Research Results

Impact of Trail on Operations Decisions

Q#8

Has the trail had any impact on your decision to do the following with respect to your operations?

Note: Q8 was asked of all respondents.

	Business Type					
	Total	Lodging	Rest-aurant	Retail	Outdoor/ Trail Business	Other
Bases:	117	40*	26*	22*	17*	12*
Expand operations in the past year	16.2%	25.0%	19.2%	0.0%	17.6%	8.3%
Make plans to expand operations	16.2%	7.5%	26.9%	4.5%	47.1%	0.0%
Top-two box	32.5%	32.5%	46.2%	4.5%	64.7%	8.3%
Downsize operations in the past year	1.7%	0.0%	0.0%	0.0%	11.8%	0.0%
Make plans to downsize operations	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
None	65.8%	67.5%	53.8%	95.5%	23.5%	91.7%

***Caution: small base sizes**

Values highlighted in were significantly higher than the values highlighted in .

Type of Expansion

Q#8a

If expanding, how did/will you expand your operations?

Note: Q8a was asked of respondents that reported expanding/planning to expand their operations.

	Business Type					
	Total	Lodging	Rest-aurant	Retail	Outdoor/ Trail Business	Other
Bases:	38*	13*	12*	1*	11*	1*
At your current business location	92.1%	100.0%	100.0%	0.0%	81.8%	100.0%
At a location that is <u>not</u> part of the trail system	2.6%	0.0%	0.0%	100.0%	0.0%	0.0%
Open a new shop (not specified)	2.6%	0.0%	0.0%	0.0%	9.1%	0.0%
At another location of the trail system	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
No answer given	2.6%	0.0%	0.0%	0.0%	9.1%	0.0%

***Caution: small base sizes**

Research Results

Impact of Trail on Workforce Decisions

Q#9

Has the trail had any impact on your decision to do the following with respect to your workforce?

Note: Q9 was asked of all respondents.

	Business Type					
	Total	Lodging	Rest- aurant	Retail	Outdoor/ Trail Business	Other
Bases:	117	40*	26*	22*	17*	12*
Create new positions in the past year	10.3%	5.0%	15.4%	0.0%	35.3%	0.0%
Make plans to create new positions	12.8%	12.5%	23.1%	4.5%	17.6%	0.0%
Top-two box	23.1%	17.5%	38.5%	4.5%	52.9%	0.0%
Eliminate positions in the past year	0.9%	0.0%	0.0%	0.0%	5.9%	0.0%
Make plans to eliminate positions	1.7%	0.0%	0.0%	4.5%	5.9%	0.0%
None	74.4%	82.5%	61.5%	90.9%	35.3%	100.0%

*Caution: small base sizes

Values highlighted in were significantly higher than the values highlighted in .

Gross Revenue in 2006

Q#10.1

Approximately what were the gross revenue figures for this business location in 2006?

Note: Q10.1 was asked of all respondents. Refused and don't know responses were removed from the base.

	Business Type					
	Total	Lodging	Restaurant	Retail	Outdoor/ Trail Business	Other
Bases:	117	40*	26*	22*	17*	12*
Less than \$50K	11.1%	20.0%	3.8%	0.0%	11.8%	16.7%
\$50K to \$149K	4.3%	5.0%	3.8%	0.0%	5.9%	8.3%
\$150K to \$249K	6.0%	2.5%	7.7%	4.5%	17.6%	0.0%
More than \$250K	19.7%	20.0%	15.4%	27.3%	17.6%	16.7%
Refused/don't know	59.0%	52.5%	69.2%	68.2%	47.1%	58.3%
Mean (dollars)	\$771,522	\$834,624	\$402,871	\$1,715,462	\$398,000	\$472,400

*Caution: small base sizes

Values highlighted in were significantly higher than the values highlighted in .

Research Results

Gross Revenue in 2007

Q#10.2

Approximately what were the gross revenue figures for this business location in 2007?

Note: Q10.2 was asked of all respondents. Refused and don't know responses were removed from the base.

	Business Type					
	Total	Lodging	Restaurant	Retail	Outdoor/Trail Business	Other
Bases:	117	40*	26*	22*	17*	12*
Less than \$50K	12.0%	25.0%	7.7%	0.0%	5.9%	8.3%
\$50K to \$149K	4.3%	5.0%	3.8%	4.5%	5.9%	0.0%
\$150K to \$249K	9.4%	5.0%	7.7%	4.5%	23.5%	16.7%
More than \$250K	22.2%	20.0%	23.1%	27.3%	17.6%	25.0%
Refused/don't know	52.1%	45.0%	57.7%	63.6%	47.1%	50.0%
Mean	\$773,310	\$855,472	\$411,304	\$1,603,929	\$472,667	\$479,204

*Caution: small base sizes

Values highlighted in were significantly higher than the values highlighted in .

Percentage of Revenue Attributed to the Trail

Q#11

What percent of your 2007 annual business would you estimate could be largely attributed to the existence of the area's biking/hiking trail?

Note: Q11 was asked of all respondents.

	Business Type					
	Total	Lodging	Rest-aurant	Retail	Outdoor/Trail Business	Other
Bases:	117	40*	26*	22*	17*	12*
None	16.2%	10.0%	3.8%	40.9%	0.0%	41.7%
Less than 5%	23.1%	25.0%	23.1%	31.8%	11.8%	16.7%
5% to 10%	10.3%	7.5%	11.5%	9.1%	11.8%	25.0%
11% to 50%	16.2%	12.5%	30.8%	9.1%	23.5%	0.0%
51% to 100%	18.8%	27.5%	0.0%	0.0%	52.9%	16.7%
Not applicable/refused/don't know	15.4%	20.0%	30.8%	9.1%	0.0%	0.0%
Mean (percentage)	25.5%	33.3%	18.3%	2.7%	51.2%	15.8%

*Caution: small base sizes

Values highlighted in were significantly higher than the values highlighted in .

Research Results

Q#12

Do you offer shipping services for customer purchases?

Note: Q12 was only asked of respondents that reported owning either a retail store or a bike shop.

Bases:

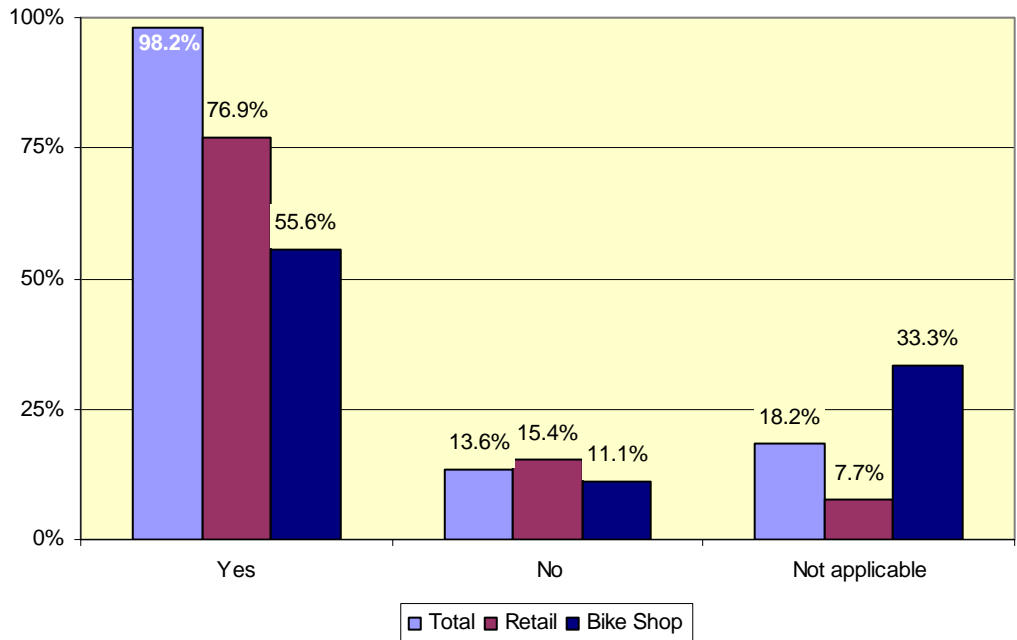
Total=22*

Retail=13*

Bike Shop=9*

*Caution: small base sizes

Shipping Services Offered



Q#12a

What is your ZIP code?

Note: Q12a was asked of all respondents.

ZIP Code – Counties

	Business Type					
	Total	Lodging	Rest-aurant	Retail	Outdoor/ Trail Business	Other
Bases:	117	40*	26*	22*	17*	12*
(Net) Allegheny County,PA	17.1%	15.0%	7.7%	22.7%	17.6%	33.3%
(Net) Westmoreland County,PA	8.5%	5.0%	11.5%	9.1%	11.8%	8.3%
(Net) Fayette County,PA	14.5%	15.0%	7.7%	4.5%	29.4%	25.0%
(Net) Somerset County,PA	15.4%	15.0%	23.1%	13.6%	5.9%	16.7%
(Net) Allegany County,MD	17.1%	12.5%	19.2%	27.3%	17.6%	8.3%
(Net) Other	27.4%	37.5%	30.8%	22.7%	17.6%	8.3%
Refused/no answer	2.6%	5.0%	0.0%	4.5%	0.0%	0.0%

*Caution: small base sizes

Values highlighted in orange were significantly higher than the values highlighted in green.

Research Results

ZIP Code – Trailtowns

Q#12a

What is your ZIP code?

Note: Q12a was asked of all respondents.

	Business Type					
	Total	Lodging	Rest- aurant	Retail	Outdoor/ Trail Business	Other
Bases:	117	40*	26*	22*	17*	12*
(Net) West Newton,PA	6.0%	2.5%	7.7%	4.5%	11.8%	8.3%
(Net) Connellsville,PA	1.7%	2.5%	0.0%	0.0%	0.0%	8.3%
(Net) Ohiopyle,PA	6.0%	2.5%	7.7%	4.5%	117.6%	0.0%
(Net) Rockwood,PA	4.3%	7.5%	7.7%	0.0%	0.0%	0.0%
(Net) Confluence,PA	8.5%	5.0%	11.5%	9.1%	5.9%	16.7%
(Net) Meyersdale,PA	1.7%	0.0%	3.8%	4.5%	0.0%	0.0%
(Net) Frostburg,MD	8.5%	5.0%	7.7%	18.2%	5.9%	8.3%
(Net) Cumberland,MD	6.0%	0.0%	11.5%	9.1%	11.8%	0.0%
(Net) Other	54.7%	70.0%	42.3%	45.5%	47.1%	58.3%
Refused/no answer	2.6%	5.0%	0.0%	4.5%	0.0%	0.0%

*Caution: small base sizes

Values highlighted in were significantly higher than the values highlighted in .

Actions Taken to Attract and/or Cater to Trial Users

Q#13

Please explain any other actions that you have taken to attract and/or cater to trail users?

Note: Q3d was asked of all respondents.

	Business Type					
	Total	Lodging	Rest- aurant	Retail	Outdoor/ Trail Business	Other
Bases:	117	40*	26*	22*	17*	12*
(Net) Additional/modified services	29.1%	35.0%	23.1%	13.6%	52.9%	16.7%
-Shuttle service	10.3%	20.0%	0.0%	0.0%	17.6%	8.3%
-Bike repairs/mechanics/shop	5.1%	5.0%	0.0%	0.0%	23.5%	0.0%
-Bike rentals	5.1%	2.5%	0.0%	0.0%	29.4%	0.0%
(Net) Advertising	27.4%	22.5%	53.8%	18.2%	23.5%	8.3%
-Placed ads in publications/TrailBook	14.5%	10.0%	30.8%	9.1%	17.6%	0.0%
-Signs on trail	7.7%	2.5%	15.4%	13.6%	5.9%	0.0%
-Advertise on the internet/ATA Web site	5.1%	12.5%	0.0%	0.0%	5.9%	0.0%
(Net) Expand/improve facilities	21.4%	20.0%	34.6%	4.5%	41.2%	0.0%
-Garage/bike storage/bike racks	6.0%	7.5%	11.5%	0.0%	5.9%	0.0%

*Caution: small base sizes

Values highlighted in were significantly higher than the values highlighted in .

Appendix A – 2007 Business Survey

Trail Town Business Survey

1. What is the primary classification of this business location? *Circle one number.*
 - Bike rental/sales/supplies..... 01
 - Campgrounds..... 02
 - Convenience/grocery store 03
 - Hotel/motel/B&B..... 04
 - Outdoor recreation/outfitter 05
 - Pharmacy/drug store..... 06
 - Restaurant/tavern/café/ice cream shop 07
 - Retail/gift/specialty store 08
 - Transportation/shuttling..... 09
 - Other _____ .. 10

2. How long have you been in business in this location?
 _____ years _____ months

3. What months of the year do you consider to be your...? *Circle the months.*
 - a) **Peak season months:**

Jan	Feb	Mar	Apr	May	Jun
Jul	Aug	Sep	Oct	Nov	Dec
 - b) **Off-peak season months:**

Jan	Feb	Mar	Apr	May	Jun
Jul	Aug	Sep	Oct	Nov	Dec

- 3c. Is your business closed for more than 2 weeks in any given month during the year?
 Yes 1
 No..... 2

- 3d. If yes, which months?

Jan	Feb	Mar	Apr	May	Jun
Jul	Aug	Sep	Oct	Nov	Dec

4. How many persons, including yourself if appropriate, do you employ during...?
 - a) Peak season: **full-time** _____
 part-time _____
 - b) Off-peak season: **full-time** _____
 part-time _____

5. On average, how many hours per week does the *typical* employee work during...?
 - a) Peak season: **full-time** _____
 part-time _____
 - b) Off-peak season: **full-time** _____
 part-time _____

6. What impact did the trail have on the location of your business?
 - Very strong influence 1
 - Strong influence 2
 - Some influence 3
 - No influence 4

7. What impact has the trail system had on this business location in the past year?
 - Increased sales/revenue significantly 1
 - Increased sales/revenue somewhat 2
 - Decreased sales/revenue somewhat..... 3
 - Decreased sales/revenue significantly ... 4
 - Has had no impact..... 5
 - Not applicable/Don't know 6

8. Has the trail had any impact on your decision to do the following with respect to your operations?
 - Expand your operations in the past year 1
 - Make plans to expand your operations... 2
 - Downsize your operations in the past year 3
 - Make plans to downsize your operations 4
 - None 5

- 8a. If expanding, did/will you expand your operations...?
 - At your current business location..... 1
 - At another location of the trail system..... 2
 - At a location that is not part of the trail system..... 3
 - Other _____ 4

9. Has the trail had any impact on your decision to do the following with respect to your workforce?
 - Create new positions in the past year..... 1
 - Make plans to create new positions..... 2
 - Eliminate positions in the past year 3
 - Make plans to eliminate positions..... 4
 - None 5

10. Approximately what were the gross revenue figures for this business location in...? (*Do not use commas, etc. ex: \$1M=1000000*)

2006: \$ _____

2007: \$ _____

11. What percent of your 2007 annual business would you estimate could be largely attributable to the existence of the area's biking/hiking trail? (*Round to nearest percentage*)

_____ %

(Answer question 12 if your business is a retail/gift or bike store)

12. Do you offer shipping services for customer purchases?

- Yes 1
- No..... 2
- Not applicable 3

12a. What is your zip code? _____

13. Please explain any other actions that you have taken to attract and/or cater to trail users.

14. Feel free to make any comments related to the economic environment of your community, the impact of the trail, and/or the trail itself.

Please remember that any business information you share will be treated as strictly confidential and will be reported as aggregated numbers only.

Optional Information (Please complete if you would like to receive a copy of the key findings to be prepared by Campos Inc. We encourage electronic distribution to save paper.)

Name: _____

Business: _____

Address: _____

City: _____ State: _____ ZIP: _____

Phone (include area code): _____

email address: _____

Please complete your survey online at www.surveywriter.net/in/survey/survey47/07-294a.asp, or return your completed survey in the postage-paid, provided envelope addressed to:

**Allegheny Trail Alliance
PO Box 501
Latrobe, PA 15650**

If you completed the online version of the survey, please do not mail this form. Thank you.

Appendix B – Open-End Responses

Allegheny County, PA

Other actions taken to cater to/attract trail users?	Additional comments related to economic enviornment?
we had a bed and breakfast for 7 years and a bake shop which have both closed not profitable	the trail is a wonderful at spurring of the economy, but it's not feasible for us
I keep the property well maintained, I offer bike and canoe rentals, I also offer food and snacks.	I hear a lot of good things about the trail, the beauty of it, it is good for the kids and I think it has a positive impact and it is good for the kids, it gets them outdoors and involved.
BICYCLE STORAGE WITH PARKING FACELITIES AUTHOMATED KEY SYSTEM FOR STORAGE RENTERS LIGHT HOMEMADE LUNCH ITEAM COMFORTABLE SEATING & RELAXED ATSMOPHERE ON THE RIVERS BIKE RENTALS BY THE HOUR MONTH OR A FEW DAYS	WE HAVE A BEAUTIFUL WELL KEPT TRAIL. MANY BIKERS PASS OUR WAY. THEY ENJOY THE RELAXED SETTING AND REASONABLE PRICES. UNFORTUNATILY, RAIN, HEAT, COLD, WID, RESPONSIBLE OVERHEAD, SECURITY SUSTEM AND ORIGINLA COST OF CREATING THIS SETIING ALL PRESENT AND PROF
	From my vantage point, I do not believe at this point in time that the trail has had impacted the community either positively or negatively. However, it would seem that there might be a positive impact in the CMU technology park area.
Trail users will have no economic impact on this business.	The large amount of public funds expended to develop the trail cannot be justified as an economic development project. The sale of a few cups of coffee, an ice cream cone and a bottle of water to 100 bike riders on a sunny summer day hardly qualifies as e
INFORM GUESTS OF AVAILABILITY + LOCATION OF TRAIL	
I think we are on the web site and we have bikes that are now available for our guests. We have also transported several guests to the start of the trail.	I think it is going to be a big burn for us and we have a big celebration for the 50th anniversery this year and the race will end right here and we are excited for that. The trail is wonderful when we went on it last summer.
I have information on my web site about the different trails.	I think the trail needs to be better marketed and information about the trail sent out to related businesses.
the trail doesnt go through our property, we provide ample parking , but we offer no other incentive for the trail.	nothing to say

Allegheny County, PA

Other actions taken to cater to/attract trail users?	Additional comments related to economic environment?
<p>ADDING A CAMPING SITE TO B&B POSSIBLY A BAIT SHOP FOR FISHING</p>	<p>I WORKED IN THE STEEL MILL. I LIVED THROUGH THE VERY HARD TIMES YOU COULD FEEL THE DEPRESSION IN THE AIR AND PEOPLE SPIRIT. IT IS NICE TO SEE BOATS AND LIKES ON THE BACK OF CARS AND PEOPLE APPRECIATING OUR COMMUNITIES FROM ALL OVER THE COUNTRY. IT IS THE M</p>
<p>We have a trail station that is near us and I have a professionally made sign near it. I also carry more energy drinks in the summer as I have more requests for them.</p>	<p>We are not on the trail. We are across the Boston Bridge on Walnut St.</p>
<p>We are a non-profit that operates a hydroponic greenhouse and sells specialty lettuce (not on the trail). Our greenhouse is located on 3.5 acres sandwiched between the Yough River & the trail. The rest of the acreage is being developed as a multi-facet</p>	<p>I think that the trail itself definitely adds to the community.</p>
<p>Nothing.</p>	<p>The trail is an ideal location for our organization - whose mission is full inclusion for people with disabilities in activities of the community. We have had a very positive experience at the trail.</p>
	<p>I think it is a wonderful thing, I also feel that it impacts the businesses on the other side of the hill more than it impacts us.</p>

Westmoreland County, PA

Other actions taken to cater to/attract trail users?

We put signs in the trail book to try and bring people here.

we offer shuttles for people with bikes, if they want to use our facilities, like canoeing, we will shuttle their bikes down river.

WE ARE CONSIDERING PROVIDING A SHUTTLE ON SATURDAYS TO THE NEAREST TRAILHEAD

SHUTTLE SERVICE BIKE REPAIRS FOR BREAK DOWNS ON TRAIL 1 TO 2 MILES

Just opened a visitors center

I Have donated food to PA Cleanways volunteers, I gave a discounted lunch for our local Curves, Hosted a political Rally at my location. I am in the process of expanding to Ice Cream.

have advertized on trail put up signs on tril put a bike rack out front

ADVERTISED A FEW SEASONS ON THE TRAIL

Additional comments related to economic enviornment?

the trail is a great thing, gets familys out doing things together, which is so costly to do family things today, and fresh air doesnt cost .

THE GREAT ALLEGHENT PASSAGE HAS HAD A POSTIVE IMPACT ON THE LOCAL ECONOMY. MORE PEOPLE USE IT EVERY YEAR, AND HIKING AND BIKING ARE THE 3RD MOST POPULAR REASON GUEST VISIT OUR FACILITY. LOGISTICS ARE THE CHALLENGE FOR US TO TAKE GREATER ADVANTAGE OF TRAI

BRINGS MORE BUSINESS TO WEST NEWTON NOT JUST FOR MY STORE BUT EVERYONE

Personlly think the town of West Newton it is revitalizing its self.

I have met many interesting people traveling on the Trail, and we have become a regular stop for several families. The Trail has a positive effect on our town, and we business' are better for having it here. Thank You!!

Why is there no sign on rt. 51 to tell people they can get on the bike trail in Smithton? There is a sign on Rt. 51 + Rt. 201 Telling people to go Connellsville 15 miles away!

People who ride the trail are not out to spend money. Most are looking for restroom facilities or a place to fill their water bottles for free.

THE TRAIL IS WONDERFUL FOR OUR TOWN. WE APPRECIATE THE BEAUTY AND HISTOR OF THE AREA MORE BECAUSE OF IT AND IT HAS GIVEN US A PRODE THAT WAS LONG LOST. MY BUSINESS AS A B&B COULD NOT SUPPORT ANYONE. BECAUSE I OPERATE A MUSIC STUDIO HERE 6 DAYS A WEEK, I C

Fayette County, PA

Other actions taken to cater to/attract trail users?	Additional comments related to economic enviornment?
Put signs on the sign post that they offer to advertise my business.	I think the trail is great, the town of Perryopolis should do more to promote the trail.
WE TRY TO PARTNER WITH OTHER TRAIL BUSINESS'S TO ENCOURAGE PEOPLE TO STOP IN EACH TRAIL TOWN AND SHOP AT LOCAL BUSINESS'S - SOJOURN'S AND BIKE TOURS ARE GREAT FOR LOCAL ECONOMIES	WHEN WE STARTED IN BUSINESS WE WERE TOLD TO EXPECT A 3 MONTH SEASON- JUNE JULY AUGUST WITH THE OPENING OF MORE OF TRAIL + MARKETING WE HAVE BEEN ABLE TO HAVE AN EXTENEDED SEASON WITH IMPROVED SALES EACH YEAR
I OFFER A SHUTTLE TO AND FROM THE TRAIL TO OUR B&B AND TO RESTURANTS FREE OF CHARGE	
WE DONT REQUIRE A LIBRARY CARD FOR TRAIL USERS TO ACCESS THE INTERNET	
CAMPING, ICE CREAM/SNACK SHOP	TRAIL ALLIANCE SHOULD HELP CONVINCHE THE TOWN OF PERRYOPOLIS TO MAKING AN EXTENTION OF THE TRAIL TO PERRY'S TOWN SQUARE PLEASE!
We are pretty new and we changed our name since last year but we hung a new sign and make brochures for the bureau. We have a lot of local products.	
I JUST ADVERTIZE ON THE INTERNET	
WE HAVE A FULL TIME BICYCLE MECHANICS OFFER BICYCLE RENTALS AND ICE CREAM AND REFRESHMENT SALES	THE KICKSTANDS IS OUR BIKE RENATL/ICE CREAM PARLOR LOCATED DIRECTLY ACROSS THE STREET FROM A MAIN PARKING AREA AND ACCESS TO GRAIL
WE HAVE EXPANDED OUR BIKE RENTAL FLETT AND REPAIR SERVICES WE PLAN TO EXPAND OUR LODGING FACILITIES	
Frequent Rider Cards	
placed pictures in our brochure, in our office. Tell guests on the phone that the trail is here to get them to stay longer and use the trail. Advertise proximity to trail at travel shows.	The trail is a great addition to the activities in this area and a wonderful activity to attract all ages, families, and groups.

Somerset County, PA

Other actions taken to cater to/attract trail users?	Additional comments related to economic enviornment?
We have a bike shop here as well and that has helped business we are located right on the trail so folks do not have to travel off trail. We help them locate places to eat.	It has all been positive because trail has has brought people here from all over the country and world.
The trail has been good for all walks of life not just bikers, the people that live near the trail use it also.	The town is made up of 60% retirees and they use the trail.
Resident campers take bike trips to different trail heads while at camp for their week of summer camp	
none.	the community has had an incredible impact because of the trail, growth of bed and breadfast, resturants, property values.
NEWSPAPER ADVERTISING INTERNET BROCHURE DISPERSAL	
Joined chamer; joined Laurel Highlands Visitor Center;	I think the organizations involved are doing a great job to get the trail recognized as well as the trail towns. They are going out of their way to help the small businesses located in the trail towns to provide services to trail users which in town impro
I'm close to the trail, but I do free shuttle runs to town and I'm very friendly.	I see a big difference in town, there are new businesses opening, more people moving here and I think it is all because of the trail.
I have modified my menu for the type of foods offered to the people who come off of the trail.	It's been fantasitic and great for the small community and the area. I have seen it getting used more and more. I have seen more business's open too such b&b and camp grounds. Every summer it gets more and more busy. Who ever is doing the marketing is doi
I have made directional signs for my bicyclists. I have explanations on my web site for the bicyclists. I'm on the ATA web site. We offer simple things for them to maintain and store their bikes.	The trail is awesome, what else can I say. It is definitely a focal point of the community. The falling water and the ATA are definite attractions and my farm makes a nice atmosphere for people to get away from the city. My website is steppingstonefarmbnb
BIKE TRAIL PACKABLE LUNCHES OUTDOOR SEATING	

Somerset County, PA

Other actions taken to cater to/attract trail users?

bike repairs bike rentals and shuttle service

BETTER ADVERTISING

ADVERTISE IN TRAIL BOOK SIGNAGE

AD IN TRAILBOOK 2007-2007 SPECIAL PACKAGE ON OUR WEBSITE TREE TRANSPORTATION TO/FROM ROCKWOOD TRAILHEAD

Additional comments related to economic environment?

THE TRAIL IS AN UPBEAT EXPENAVICE FOR CONFLUENCE- WE ARE 4 MILES UP HILL FROM CONFLUENCE- SOMETIMES BIKERS DON'T BIKE UPHILL 4 MILES FROM CONFLUENCE

WE ARE A SMALL B&B LOCATED SIX MILES FROM THE ROCKWOOD TRAILHEAD. IN 2007 WE HAD APPROX 145 SETS OF QUESTS, OF WHICH 8 RODE ON THE TRAIL AT SOME POINT WHILE STAYING WITH US. OBVIOUSLY, OUR DISTANCE FROM THE TRAIL DOESN'T PUT US AT THE TOP OF THE LIST FOR

Alleghany County, MD

Other actions taken to cater to/attract trail users?	Additional comments related to economic environment?
Trail Book, Internet Web site, radio	Great! Too Busy!
Post decal you shop we ship listing on trailhead maps listing in city maps	most bike traffic is very early morning 7-9am hill to business desferet well, challenging
advertise in appropriate publications trailbook, etc	the trail should have a positive effection business in downton during the season. It also has been great for local residents for hiking and biking. I think we will imporove in the future
NO ENOUGH, WOULD APPRECIATE ANY IDEAS	I BELIEVE, IT WILL GROW IN LEAPS & BOUNDS. WOULD LIKE VERY MUCH TO BE A BIG PART OF IT
OFFER BIKE WASH, HIGH SPEED INTERNET, FREE WATER, FREE BATHROOMS, PAY FOR SHOWERS, LAUNDRY	NEED TO CONVINCEN TOWN OF FROSTBURG THAT THIS CAN BE A GOOD THING. NEED FOR THE CITY TO HELP PROMOTE PROMOTE PROMOTE.
ADV IN TRAIL BOOK 2ND YEAR, UPGRADES DRAFT BEEN SYSTEM TO 16 DRAFTS ADDING NEW SELECTIONS OF BOTTLE BEER	POSSIBLE 50/50 MATCH FOR BIKE LOCKERS IN FRONT ON THE DECK OF MY BUSINESS
OFFERED TO PICK UP AND DELIVER PEOPLE TO THE TRAIL HEAD IN FROSTBURG	
AD IN TRAIL BOOK ADDS IN HOTEL BOOK ADDS IN LOCAL PUBLICATIONS	I THINK IT IS A VERY POSSTIVE BENEFIT WE NEE TO CONVINCEN LOCALS AND BUSINESS COMMUNITY TO BE MORE BIKER FRIENDLY
We give excellaent services and we advertise but we don't just target the trail business.	The trail has had and economic impact on business like restaurant business are doing good.
Nothing.	I think we're on the tip of the iceberg, I think it is too early to tell but I think the economy from the trail will increase.
I have established horse stables.	I'm waiting for the new trail to open, as it borders my property.

Alleghany County, MD

Other actions taken to cater to/attract trail users?	Additional comments related to economic environment?
We market our collegiate conferences and events program to a wide audience and with the trail we have increased attention on a recreational runner/hiker/biker crowd.	It's a wonderful resource for the area.
we advertise in the trail books.	i see it picking up each year, it is good for communities involved in it, we support it.
WE NOW HAVE SOME SUNDAY HOURS	WE HOPE THE TRAIL CAN POSITIVELY EFFECT BUSINESS. WE DONT SEE TOO MANY COME UP TO MAIN ST.
WE HAVE ADVERTIZE IN TRAIL BOOK AND ON WEBSITE, PLUS WE OFFER GOOD RELATING TO BIKERS	

Other Counties

Other actions taken to cater to/attract trail users?	Additional comments related to economic enviornment?
Years ago, we placed ads and offered to shuttle bikes. We have a map from the trail (with mile markers) to our B&B on our website.	As residents, we love the trail. Our B&B is over a mile up a steep hill from the trail, so we're not surprised that trail users don't flock to our inn.
we started a shuttle service.	the trail is new, it is a good thing, it will bring people will to the c & l canal and the trail, allow people to do both and do more camping. i have a concern, when you call for questions, i get a vlunteer, and not uptodate on the basic questions, unable
We offer some services that bikers and hikers can use here like vending machine, through hikers can mail package in the mail so they can replish their pack when they get here, we do mailing for them because they can't always get to town we also offer comp	We would really like to see better access to the trail, would like to see better shoulders on the trail for easier access to the hostel.
We offer different specials, but I get very little business from the trail as I am on an island.	I am the only business in this community and the trail has no impact on my business.
WE HAVE A GARAGE FOR THE CUCLISTS BIKES, WE ARE REAL CLOSE TO THE TRAIL. WE HAVE LAUNDRY FACILITIES FOR OUR GUESTS.	
The trail is on our website as an attraction.	
Supply free pick up service. Extend discount rates. Have special bike storage area	
SPORTS DRINKS BOX LUNCHEs HEALTHY SNACKS TRAIL INFORMATION PACKAGE EATS MADE FRESH BUT EASILY CARRIED	
SIGNAGE FLYERS	
None. I am too far from the trail	

Other Counties

Other actions taken to cater to/attract trail users?	Additional comments related to economic enviornment?
I have put a sign along the trail and I plan on putting out picnic tables with an umbrella and I have also cleaned up a large area around the trail.	It is a great impact now that we have lost a lot of our manufacturing businesses. We are located close enough to the trail that people are not worried about the cost of gas.
EXPAND RESTAUTANT SEATING FROM 40 TO 200 HORE A CHEF ADD/BUILD A NEW OUTDOOR DINING DECK JOINED LAUREL HIGHLANDS INCREASE AD DOLLARS IN TRAIL RELATED PUBLICATIONS	TRAILHEAD NEEDS TO BE UPDATED CONTINUE WITH TRAIL TOEN CONCEPT
BIKERACKS AND LANDSCAPED BUFFER OVER 1,000 L.F. IMMEOATE ACCESS TO 300+ PARKING SPACES GARBAGE CANS	IT IS A VALUABLE COMMUNITY ASSET, HOWEVER, FROM A BUSINESS STANDPOINT IT;S VALE IS NEGLIGABLE OR EVEN SLIGHTLY NEGATIVE DUE TO IMPOSITION OF EXISTING TENENTS PARKING, GARBAGE NOT PLACED IN CANS PROVIDED AND SUBSTANTIAL INCREASE IN SEWERWGE CHARGES INCURRED
BIKE RACKS OUTDOOR TABLES PARTNERING EFFORTS	
BIKE FRIENDLY TRAIL LUNCHES TRAILBOOK COMPAMENTY	
advertise that we are near	
ads	
	BECAUSE WE OPEN AT 4:30PM THE TRAIL DOESN'T IMPACT OUR CURRENT BUSINESS. WE ARTE PLANNING ON OPENING A RESTAURANT, AT WHICH TIME WE HOPE TO HAVE SOME OF THE TRAIL BUSINESS