



Creating Opportunities Along the Nation's Trails

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Trail User Survey and Business Survey Report

Great Allegheny Passage
March 2015





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Executive Summary



In 2014 the Trail Town Program® conducted a trail user survey along the Great Allegheny Passage (GAP). The GAP Trail runs from Pittsburgh, PA to Cumberland, MD, spanning 150 miles. This trail is visited by almost a million users every year generating economic impact along the way. The trail itself is owned and operated by several local trail organizations and merge under one coalition known as the Allegheny Trail Alliance.

The purpose of these studies is to provide information regarding the economic impacts of the GAP Trail. This is utilized methods from the 2012 trail user survey and business survey. Trail User survey forums were distributed to eleven towns beginning in Homestead, PA to Cumberland, MD and 562 surveys were collected for this study. Over half of the users reported that this was their first trip along the GAP trail and the majority was traveling in groups of two.

Roughly 62% of trail users were planning an overnight stay with an overnight spending average of \$124.58. This has increased by \$26 since the 2008 trail user survey. The average day user spends roughly \$18.

Business surveys were collected online through an online polling method. Surveys were also collected through paper copies as well and inputted into the online forum. Forty-five businesses responded to the survey. The majority of these businesses that reported were from lodging, eateries, and retail. The majority of businesses that responded to the survey had been in businesses in that location between 1 and 10 years.

Businesses had reported an overall increase in trail user traffic from 34% in 2013 to 41% in 2014. Their reported international traffic was 6%, up 1% from last year. 40% of the businesses planned to expand and of those reported to expand 67% attributed their expansion to the impact from the trail.

From all previous studies, there has been an overall increase in trail user economic impact along the Great Allegheny Passage.



Methods: Study 1 – Trail User Survey

From July to October 2014, Trail Town Program® staff and volunteers could be found at 11 trailheads on the Great Allegheny Passage (GAP) surveying visitors to the trail corridor, including the following Trail Towns:

- Pennsylvania
 - Homestead
 - McKeesport
 - Boston
 - West Newton
 - Connellsville
 - Ohiopyle
 - Confluence
 - Rockwood
 - Meyersdale
- Maryland
 - Frostburg
 - Cumberland

At some locations, staff and volunteers at visitor centers (West Newton, Ohiopyle, Rockwood, and Meyersdale) surveyed during their operating hours. Surveyors were instructed to intercept trail users during two-hour periods on prescribed dates and request they answer the six survey questions. Surveys were typically completed on one week day and one weekend day per month with rain dates in between. Surveyors were instructed to record their visitors' verbal answers on the survey form.

This survey included six main questions including zip code, group size, as well as spending and lodging habits. During the survey period 562 sample surveys were completed and documented. Below is the survey that was completed with trail users as well as the results.

2014 Great Allegheny Passage Trail User Survey - Questions

1. **ZIP code(s)** _____
2. **Is this your first trip on the Great Allegheny Passage?** Yes or No
3. **How many are in your group?** _____
4. **Is this a multiple day trip?** Yes or No (circle one)
 - a. If YES, where did you begin your journey and where will you end on the Trail?
 - b. Begin: _____ End: _____
5. **What do you estimate your group's total spending will be in the communities today on....?**

Snacks/Beverages \$_____	Clothing \$_____
Equipment rental (bikes, canoes, etc.) \$_____	Restaurants \$_____
Transportation (shuttling, taxi, etc.) \$_____	Other (sunscreen, film, etc.) \$_____
6. **In conjunction with your trip, have or will you plan an overnight stay?** Yes or No
 - a. **If Yes, How much does your group plan to spend for overnight accommodations per night?**
\$_____
 - b. **What type of accommodation do you plan on staying?** (Check below)

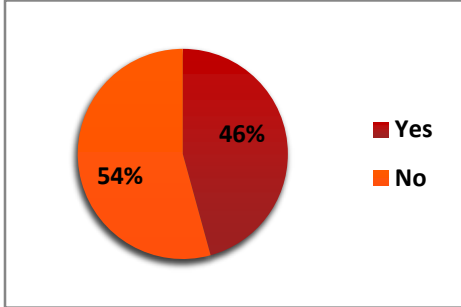
Bed and Breakfast_____	Campground_____
Friend or Relative's Home_____	Motel/Hotel_____
Hostel_____	Guest House_____
 - c. **How many overnight stays have you/do you plan to have in conjunction with your visit to the Trail?**

2014 Trail User Survey Results

1. Zip Code

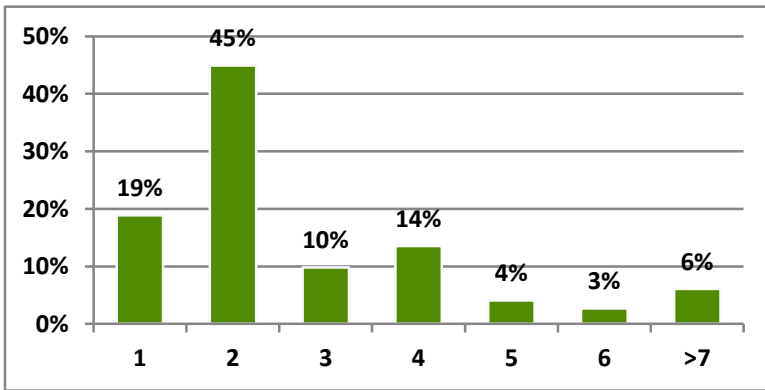
Trail users were asked to provide their home zip codes. A total of 34 states and the District of Columbia were represented. Three countries including Canada, Czech Republic, and Spain were also represented.

2. Is this your first trip on the Great Allegheny Passage?



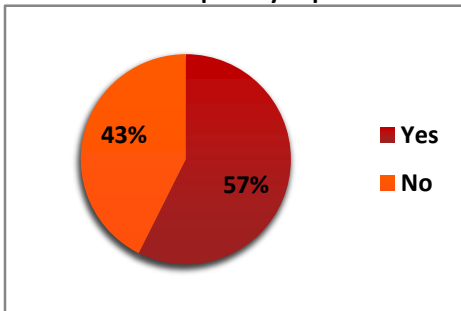
From this sample survey, there has been an increase in first time visitors to the Great Allegheny Passage **from 22% in 2011 to 46% in 2014**. First time users have more than doubled in the past 3 years.

3. How many are in your group?



This chart shows the size of groups that traveled on the Great Allegheny Passage broken down from 1 through 6 and 7 or more. The dominant group size was **2 people at 45%** followed by **1 person at 19%**. This is consistent with the 2011 survey showing that 44% of groups were 2 people. Since 2011 a group of only 1 has dropped from 34%.

4. Is this a multiple day trip?



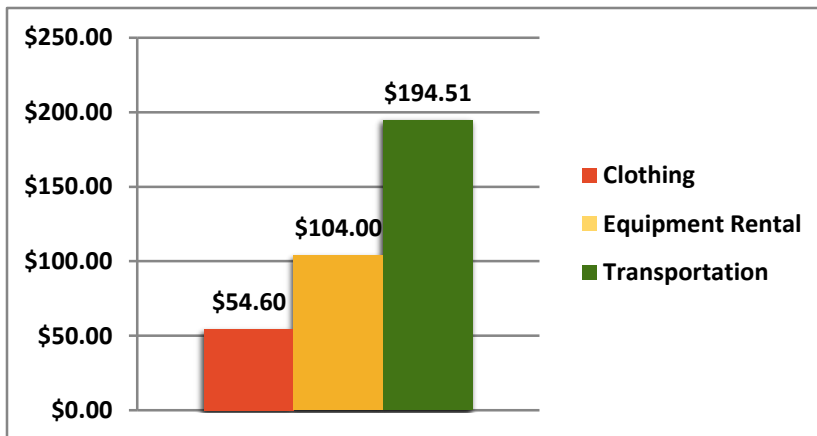
This chart shows that surveyed trail users are spending more than one day visiting the Great Allegheny Passage and the region. **57%** have planned a multiple day trip. Since 2011 this number has more than double from 23%.

Of those surveyed in 2014, many planned long distance trips along the entire length of the Great Allegheny Passage and/or C&O Canal. About **21%** traveled between Pittsburgh and Washington DC, and about **13%** traveled between Pittsburgh and Cumberland.

5. What do you estimate your groups total spending in the communities will be today on...?

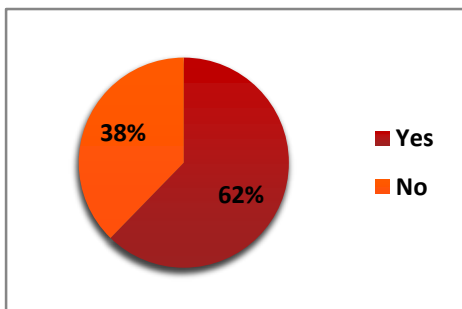


All trail users and groups were surveyed on their average spending habits related to their trip along the Great Allegheny Passage. The categories that trail users spent on average more money on **restaurants and snacks/beverages**.



Clothing, Equipment Rental, and Transportation were not frequently purchased items. For this chart we found the averages for those who spent money in these categories. Here we wanted to demonstrate the average amounts people would spend on these items when purchased.

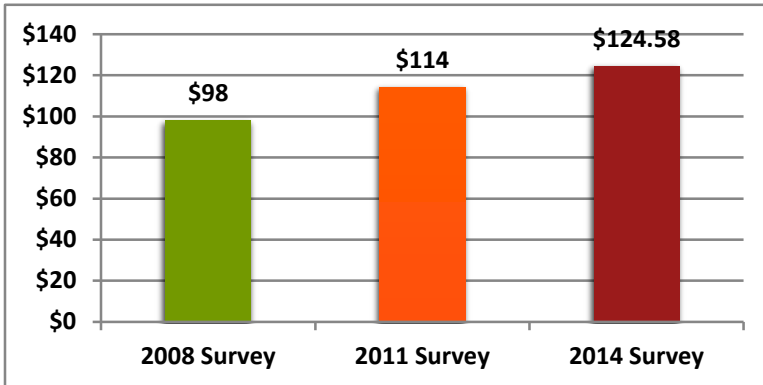
6. In conjunction with your trip, have or will you plan an overnight stay?



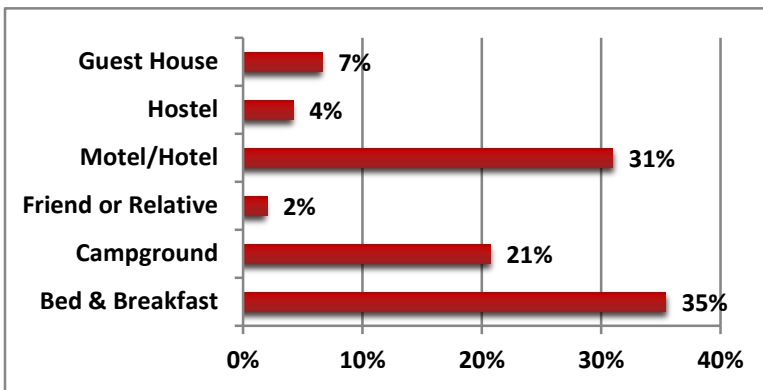
Of those planning a multiple day trip on the Great Allegheny Passage, **62%** included an overnight stay. This number has more than double from the **28%** that were planning overnight stays in 2011, signifying a growing number of people are staying overnight in conjunction with their ride.

a. If yes, how much does your group plan to spend for overnight accommodation per night?

The average amount spent on overnight stays was **\$124.58**. This is an increase from the 2008 and 2011 Trail User Survey. Since 2008, there has been a \$26 increase in average spending on overnight accommodations.

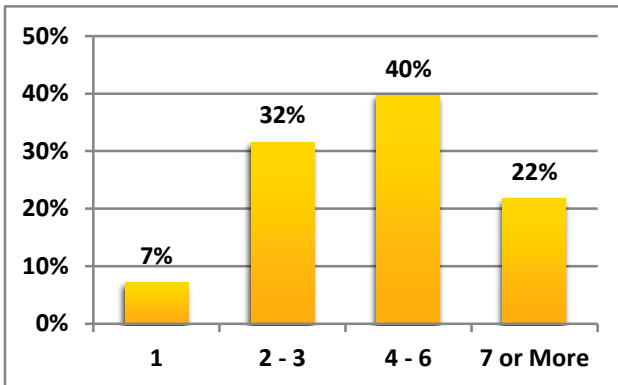


b. What type of accommodation do you plan on staying in?



This chart shows that type of accommodation trail users were staying in if they included an overnight stay. The most common accommodations that trail users stayed with are **Motel/Hotel at 31%** and **Bed & Breakfast at 35%**. Overall indoor accommodation has increased from 2011 from 59% (excluding guest house). With this there has been a proportional decrease in camping by 5%.

c. How many overnight stays have you or do you plan to have in conjunction with your visit to the trail?



This chart show the amount of nights trail users stayed in conjunction with their journey on the trail. The most common amount of nights for users to stay **was between 4 and 6 nights at 40%**.



Trail User Survey Comments

In addition to these questions, comments were received from trail users. Below is a selection from the comments. A full list of recorded comments is available upon request.

- We are from Spain, Barcelona. Awesome trip planned two years ago.
- We're just out for a walk on the trail. This is our first time on the trail - It's beautiful - I've seen it from the road so many times - retired pharmaceutical rep (with his dog)
- Very impressed by consistent and helpful signage along the trail - mileage markers and others - and by how well the trail is kept can't wait to do a slower version of the trip so we can stop and explore more places
- Depending on location, restroom amount is either good or needs work
- We cycled a lot of trail all over the United States. This is the best trail in the U.S. The C&O Canal Towpath suffers by comparison.
- Good trail, well maintenance other than few trouble spots
- Signage is good other than for Pittsburgh
- We read the TrailBook to schedule our trip - overnight accommodations, restaurants, etc. We stayed at the Hampton Hotel in Pittsburgh and had trouble finding the trail - It's confusing - no signs, no bike lanes - my son, Brodie, 10, suggested we all ride the trail, so we are. (Grandparents, too. 89509) This is the perfect time to ride. Fall foliage is beautiful. We are taking our time - 30 miles a day. We'll do more biking.
- C&O has more primitive campsites, where the GAP does not. Cheaper, noncommercial sites are desired.
- Fantastic trail, well maintained and very friendly. Countryside is beautiful in early October
- This couple rode from Cumberland to Boston six years ago and always wanted to finish the whole thing. With the trail being completed, they came back to finish. They are riding to Pittsburgh and back and driving back home tonight, happy to finally finish their adventure

Methods: Study 2 – Business Survey

Businesses along the GAP corridor were surveyed to measure the economic impact of the trail. These surveys were collected online, by mail, and in person from October 2014 through February 2015. For those that completed the survey online, businesses were invited to participate through direct contact via email and through social media. Key businesses were mailed the survey directly for completion. During Trail Town Certified Network assessments it was requested that business owner fill them out. Also the surveys were handed out to business owner at our 2014 Fall Trail Town Summit in October.

Along the Great Allegheny Passage forty-five businesses responded to the survey ranging from lodging, eateries, and retail. The survey consisted of eleven questions asking businesses about what type of business they owned as well as how much of their customers were trail users. Below is the survey that businesses were requested to fill out as well as the results.

2014 – 2015 Great Allegheny Passage Business Survey Questions

1. What is the zip code of your business? _____

2. What is the primary classification of your business?

- Bike rentals/repairs/sales/supplies
- Campgrounds
- Convenience/grocery store
- Hotel/motel/B&B
- Outdoor recreation/outfitter
- Pharmacy/drug store
- Restaurant/tavern/café/ice cream shop
- Retail/gift/specialty store
- Transportation/shuttling
- Other _____

3. How long have you been in business in this location?

_____ Years _____ Months

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

- No
- Yes

If yes, which months? Circle the months.

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

5. What days of the week is your business open? Circle all that apply.

Sunday Monday Tuesday Wednesday Thursday Friday Saturday

6. What are your busiest days during your peak season? Circle all that apply

Sunday Monday Tuesday Wednesday Thursday Friday Saturday

7. Do you plan to expand your business?

- Yes No

If yes, did the trail impact this decision?

- Yes No

8. What percent of your annual business would you estimate to be attributable to the trail?

2013 _____% 2014 _____%



9. Roughly what percentage of your guests/customers are international visitors?

2013 ____% 2014 ____%

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

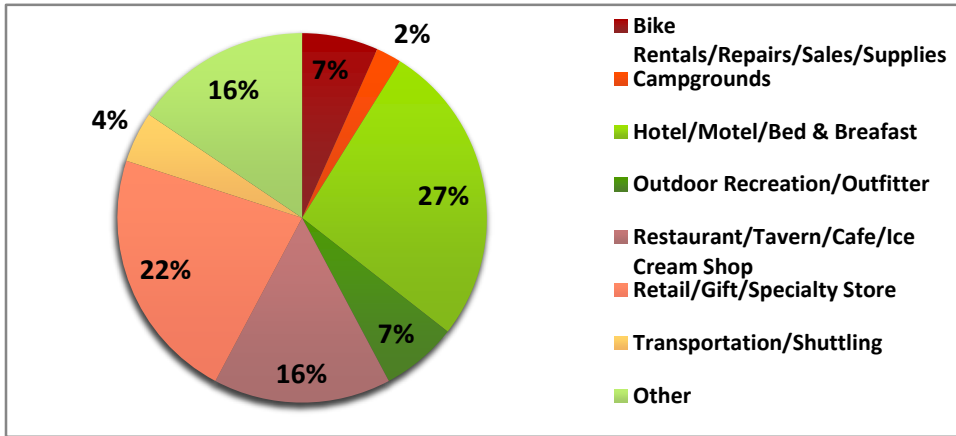
11. Please provide any comments related to the economic environment of your community, the impact of the trail, and/or the trail itself. _____

2014 – 2015 Business Survey Results

1. What is the zip code of your business?

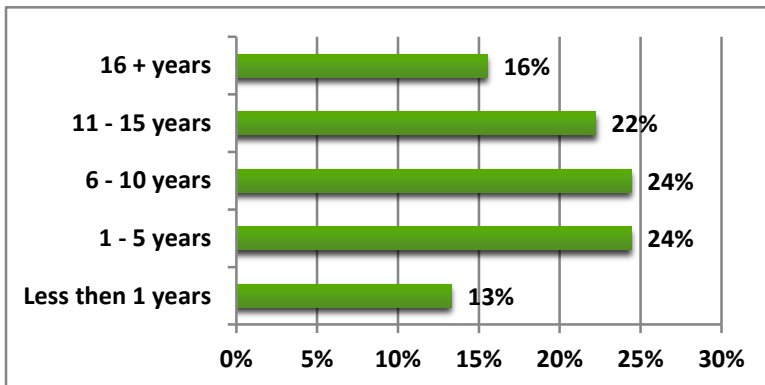
Zip codes were collected to confirm that businesses were in close proximity of the trail corridor.

2. What is the primary classification of your business?



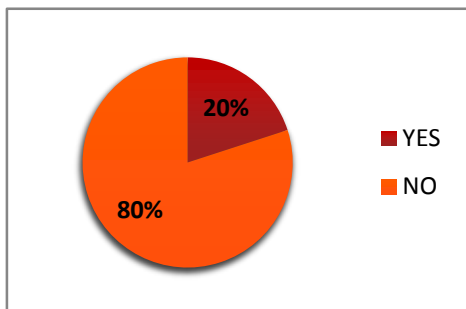
This chart shows the breakdown of the businesses that replied to the survey. We had no submissions from Convenience/Grocery Store and Pharmacy/Drugstore. The majority of our survey respondents were from **lodging and retail**.

3. How long have you been in business in this location?



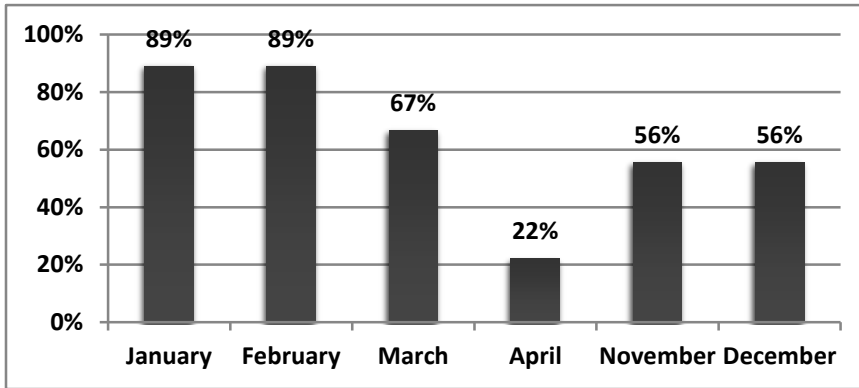
The majority of respondents from business that were surveyed along the Great Allegheny Passage have been in their location between **1 and 10 years**.

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



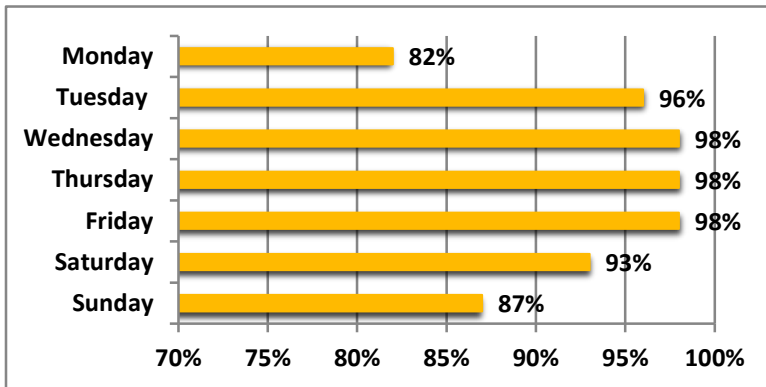
The amount of businesses that are closed for more than 2 weeks have **decreased by 5%** since our survey in 2011.

a. If yes to the prior question, which months?



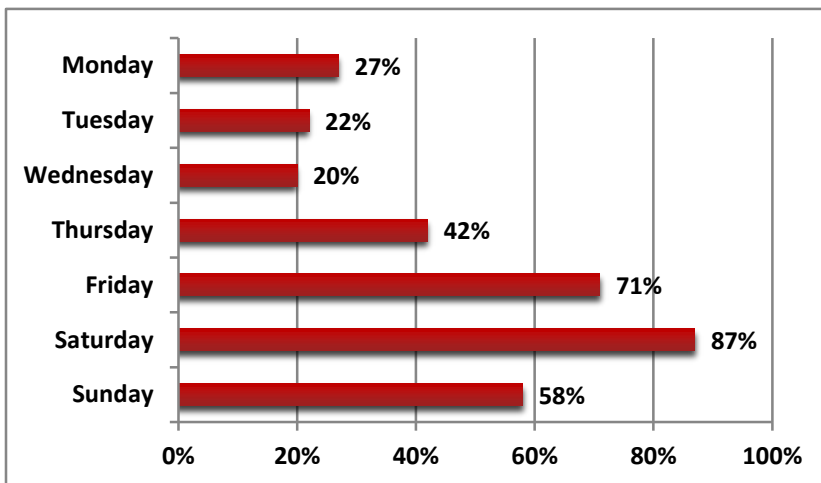
All of the businesses surveyed reported not being closed during summer months of May through August. Of those that are closed for more than two weeks reported being closed during winter months of November through February.

5. What days of the week is your business open?




The majority of businesses that responded are open on Monday through Sunday.

6. What are your busiest days during your peak season?



Busiest days during peak season were primarily on Friday and Saturday, followed by Thursday and Sunday.

7. Do you plan to expand your business?



Since 2011 there has been an increase in the amount of businesses that are planning to expand. This amount has increased from 30% to **40% in 2014**. **Eighteen out of the forty-five business that responded reported that they will be expanding their business.**

If yes to prior, did the trail impact this decision?

Of the businesses that planned to expand, 67% of them have noted that the trail impacted their decision. In 2011, 46% of businesses that planned to expand did so due to the trail. **Twelve out of the Eighteen businesses that stated they are planning to expand their business, responded that the trail impacted their decision.**

8. What percent of your annual business would you estimate to be attributed to trail in 2013 and 2014?

Businesses that were survey averaged that in 2013 **34%** of their annual business attributed from the trail. In 2014 the average increased to **41%**. From our survey in 2011, business attributed only 31% of their annual business from the trail. Over 3 years there has been 10% increase in business from the trail.

9. Roughly what percentage of your guest/customers were international visitors in 2013 and 2014?

Businesses surveyed, reported that in 2013 an average of **5%** of their guest/customers were international guests. In 2014 the average increased to **6%**.

Business Survey Comments

Below is a sampling from the comments. A full list of recorded comments is available upon request.

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

- "We offer bike shuttles, trip packages, we have developed a wide array of trail related items.
- We have increased signage, Facebook advertising and trail specials through the season advertise on various websites and publications
- Extended hours into evening for special group tours.
- Promoted ourselves in information packets given to tour riders.
- Have stocked some inventory geared to bike riders
- Am involved with local arts group trying to get trail riders and hikers into the downtown area thru signage etc. Also left advertising brochures with Canal Place tourist office near bike trail.
- With increased signage and awareness of our business and it's vicinity to the trail, we will be offering additional promotions, rates, and special offerings geared specifically towards trail users that utilize the section closest to our shop.
- Provide bike rack, outside umbrella tables, USPS shipping service, information and maps available
- Grab and go items, vegetarian choices, gluten-free choices
- LHVB and networking with local businesses and marketing
- Add bike rack and water cooler - our sales manager is on the local trail board

Please provide any comments related to the economic environment of your community, the impact of the trail, and/or the trail itself:

- Need to work more on winter ideas
- Economic impact. Connellsville is huge! West Side has 4 new businesses this year!
- The trail provides daytime business for us when trail slows so does lunch. Trail provides us customers we would never have
- In the last 6 years 13 new businesses have opened in Confluence. Only two of those businesses are not specifically trail/tourism associated.
- I think Cumberland hasn't realized the potential economic impact of the trail
- The trail has had a very positive impact on the community. I still feel our community needs to develop a more seamless approach to sustainable tourism. In my opinion they need to understand the rising waters float all boats. It is better than it used to be but not yet where it needs to be
- Tourism is an important part of our business. We do use the DCBA (Downtown Cumberland Business Association) You Shop, We Ship signs. This is an antique/collectibles shop, hard for bicyclists to purchase most things without shipping. We rarely have anyone ask us to ship. While we may not directly benefit significantly from the trail the fact is, if they like what they see, they will come back. That's important. I'm not sure if there is much connect with the trail organization, Main Street Cumberland, etc. I hope it will increase.
- We, (as in the Business association) need to do a better job promoting our ""downtown"" to trail users... AND to their wives who are driving from point to point. When we get 'the drivers' in our shop, they are GREAT customers! They have nothing to do all day except SHOP!
- I appreciate all your efforts in promoting the trail: it keeps getting better every year!
- The bike trail and its users has had slight impact on our business, which is fair trade, international crafts and fashion items. Most people hiking and biking do not purchase things on the road. We have shipped items for a miniscule number of this category over 8 years.
- We are beyond excited that the addition of the Mon Wharf Switchback project downtown Pittsburgh will literally connect 2 of our most popular locations – little Boston and Pittsburgh!
- The trail has created businesses in this town. The town isn't big enough to support businesses like those that are now here to support the community.
- The trail traffic brings a great amount of commerce into our are
- The trail has generated a number of new businesses in our town.
- Visitors bring an advanced respect for organics, recycling...going green