Quantitative Research Report

The Great Allegheny Passage Economic Impact Study

(2007–2008)

For

The Progress Fund's Trail Town Program

Laurel Highlands Visitors Bureau

and

Allegheny Trail Alliance

Job #07-294

August 7, 2009

campos inc

Table of Contents

Background and Methodology

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Background and Objectives

The Progress Fund's Trail Town Program, Laurel Highlands Visitors Bureau (LHVB), and the 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 (completed in 2008)
- Phase II, marketing research among trail users (conducted throughout 2008 and reported in 2009)
- Phase III, follow-up economic impact research among businesses (completed in 2009).

The objectives for each phase of the study included the following:

Phases I and III:

- To obtain gross sales revenue from trail side and trail-related businesses for 2006 and 2007 (Phase I) and 2008 (Phase III).
- 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.

Phase II:

- To profile trail visitors' usage of the trail (i.e., how often they visit, purpose of visit, hours spent, etc.).
- To determine group characteristics (i.e. ages, gender, income, etc).
- To establish the ZIP code origin of the visitor.
- To determine mode of transportation to arrive at trail and one-way distance.
- To determine how much was spent in various categories such as bike rental, equipment, food and drink, gasoline, retail shopping, grocery/convenience store purchases, lodging, etc.
- To profile dining habits in terms of bringing food, purchasing food for picnics/"on the go", dining at restaurants, and reasons for choosing that option.
- To identify any unmet needs of trail users.
- To determine reasons for not visiting the trail areas among prospective visitors that did not follow through with a visit.

Methodology

Phases I and III:

Campos Inc designed the Phase I survey instrument and made minor revisions for Phase III with input and approval from the Trail Town Program, LHVB, and ATA.

Each phase of the economic impact among businesses utilized a multimodal data collection methodology, mail, web, and telephone interviews. Data collection for Phase I took place between March 17, 2008 and April 24, 2008 while Phase III data collection started March 30, 2009 and ended May 28, 2009.

Overall, for each phase businesses were surveyed as follows:

	Phase I	Phase III
Mail/fax	58	64
Online	30	20
Phone	29	36
Total Completes	**117**	**120**

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

Copies of the questionnaires can be found in the Appendix sections of the Phase I and Phase III studies.

Phase II:

Campos Inc designed the survey instrument with input and approval from the Trail Town Program, LHVB, and the ATA.

The intercept survey was administered by volunteers to trail users at specific locations along the trail and the completed surveys were entered online. Overall, more than 1,000 hours were invested by volunteers over the course of the 6 month period administering surveys and entering data; ultimately saving the Trail Town Program, LHVB, and the ATA upwards of $25,000 in potential data collection costs.

Background and Methodology

A total of 1,272 intercept surveys were administered at eight different locations along the Great Allegheny Passage starting on May 23, 2008 and ending on October 26, 2008.

Intercept surveys were collected as follows:

	Completes
Weekdays (Mon.-Thurs.)	664
Weekends (Fri.-Sun.)	571
Summer Holidays*	37
Total Completes	**1,272**

Note: Memorial Day, 4th of July, or Labor Day

In addition to the intercept survey, a supplemental sample was collected online among individuals that had requested information about the trail within the past year.

The survey instrument for this supplemental sample was nearly identical to the intercept survey with the addition of several qualifying questions and a series of unique questions aimed at discovering reasons that non-visitors chose not to visit the trail/region and identifying any alternative plans/trips.

A total of 302 respondents completed the supplemental survey between October 8, 2008 and November 29, 2008 with 228 reporting that they visited/planned to visit the trail and 74 respondents reporting that they had not/did not plan to visit the trail.

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

Copies of the questionnaires can be found in the Appendix of the Phase II study.

Background and Methodology

Analytical Notes

- Based on their statistical accuracy (*SA*) scores at the 95% confidence level, there is a one in twenty (20) chance that the "true" measurements observed among the following sample sizes would fall outside of these ranges:
  - The Phase I sample of 117 yielded a *SA* of ±7.14%.
  - The Phase II (intercept) sample of 1,272 yielded a *SA* of ±2.75%.
  - The Phase II (supplemental) sample of 321 yielded a *SA* of ±5.64%.
  - The Phase III sample of 120 yielded a *SA* of ±7.9%.

- Where appropriate, statistical testing was conducted to determine significant differences between:
  - *Business types* and *county locations* for Phases I and III.
  - *Locations of interview*, *type of trail user*, and *various demographics* for Phase 2.

- Due to small sample sizes, caution should be used when interpreting some of the subgroup analysis results. While some subgroups may have be too small to draw statistically valid conclusions, patterns may have emerged 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

Executive Summary

The Great Allegheny Passage (GAP) is a 132-mile system of biking and hiking trails that connects Cumberland, MD to McKeesport, PA (near Pittsburgh, PA). In 2006, the GAP was connected to the C & O Canal Towpath in Cumberland, MD creating a continuous non-motorized corridor, 318 miles long, from McKeesport to Washington, DC. The Progress Fund's Trail Town Program, Laurel Highlands Visitors Bureau (LHVB), and Allegheny Trail Alliance (ATA) contracted Campos Inc to conduct three phases of research aimed as discovering the economic impact that the completion of the trail has had on the trail towns and businesses located near or along the trail.

On average, business owners indicated that one-quarter of their gross revenue was directly attributed to trail users and **two-thirds reported that they experienced at least some increase in gross revenue because of their proximity to the trail.** Over one-quarter of all businesses that were surveyed mentioned that they have or plan to either expand their operations or hire additional staff because of the impact of the trail.

- Generally speaking, lodging/hotel establishments and outdoor/trail related businesses reported the largest increases in their estimated annual revenue compared to the other business types.
- On average, businesses located in Fayette County, Somerset County, and Allegany County, MD provided the highest estimation in regard to the percentage of their gross annual revenue that could be directly attributed to the trail.
- Among those surveyed over the past two years $23,878,495 worth of receipts (actual revenue) was attributed to the trail ($11,990,990 in 2007 and $11,887,505 in 2008) and $4,372,190 worth of wages were paid to employees of those respective businesses ($2,078,956 in 2007 and $2,293,234 in 2008).

When projecting average total receipts across the businesses included in the sample universe, **trail attributed revenue in 2007 was $32,614,703 and it was projected that businesses distributed $6,273,927 in wages.** Despite the tough economic times, **in 2008 these figures actually increased to projected receipts and wages of $40,677,299 and $7,500,798,** respectively.

Trail users' purchasing and usage behaviors differed depending on which type of trail user they were. Not surprisingly, trail users traveling 50 miles or more to arrive at the trail spent approximately twice as much in trail communities as those traveling less than 50 miles.

- Four in ten trail users that were surveyed planned an overnight stay as part of their trip. **On average, these overnight trail users spent $98 a day in the trail communities and on lodging.**
  - Over one-third of the overnight trail users reported household incomes of $100K or more.
- The remaining trail users surveyed were either local residents or were enjoying a day trip. These local/day trip trail users spent an average of $13 a day in the trail communities.
- The average distance traveled to arrive at the trailhead was 131 miles and the median distance was 20 miles. **On average, overnight trail users traveled 289 miles with a median distance of 90 miles.**
- Biking was the primary activity being performed by approximately nine in ten trail users. **Nearly all of the overnight trail users reported biking as their primary activity while using the trail.**
- Over three-quarters of the overnight trail users reported using the trail for recreation. In contrast, using the trail for health and/or fitness was mentioned by more than half of the local and day trip trail users.
- Trail users from 670 unique postal codes were surveyed; this included nearly every state in the continental United States and parts of Canada.
- Over eight in ten trail users indicated that they were 35 years of age or older.

Phase I: Trail Town Business Study (2008)

Table of Contents

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Background and Objectives

The Progress Fund's Trail Town Program, Laurel Highlands Visitors Bureau (LHVB), and the 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 Trail Town Program, 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 ±7.9% at the 95% confidence level. This means that there is a one in twenty (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.
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Key Findings

Key Findings

Overview

- In 2007, it was projected that trail businesses on or around the trail received $32,614,703 in receipts and paid their employees $6,273,927 in wages to accommodate trail generated business.
  - These receipt projections were four-times larger, and the wage figures were over six-times larger, than the levels reported in 1998 ($7,960,546 and $984,778; respectively).
- Trail attributed receipts for 2007, calculated only among those businesses surveyed in Phase I, totaled $11,990,990 and these trail businesses contributed to their local economies by paying $2,078,956 worth of wages to their employee's for attending to this consumer group.
- Respondents indicated that one-quarter (25.5%) of their 2007 gross revenue could be attributed to trail users and nearly two thirds (64.4%) reported that they experienced at least some increase in gross revenue because of their proximity to the trail.
- Within the next year, about one-third (32.4%) mentioned that they have or plan to expand their business operations and/or services they offer because of the impact they felt from the trail.
  - Expansions/additions to facilities and/or services were reported by outdoor/trail related businesses, restaurants, and lodging/hotel establishments most often.
- The most popular expansions/additions to facilities and/or services were:
  - Increasing advertising efforts (in publications and along the trail)
  - Offering shuttle service for customers
  - Providing bike parking/accommodations
  - Increasing staff

Conclusions and Recommendations

Overall, business owners' 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.

- Respondents indicated that one-quarter (25.5%) of their 2007 revenue could be attributed to their proximity to the trail.

Interestingly, when adjusting for those businesses that did not respond, calculated receipts for Phase I were projected to be $32,614,703 and wages were projected to be $6,273,927. Each of these figures was significantly greater than those observed in 1998 where projected receipts were $7,960,546 and projected wages were $984,778.

See Appendix D at the end of the report for a detailed model of the receipt calculation.

- 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 calculated* receipt and wage totals that were the same as the calculated receipt and wage totals of the businesses that did respond within that group. The projected results, because they are based on a relatively small sample, can only be used to estimate the total businesses activity along the trail.

Furthermore, reported gross revenue displayed slight to significant increases from 2006 to 2007 across all business types except retail.

- The most dramatic increase in both calculated receipts (between 1998 and 2007) and reported gross revenue (between 2006 and 2007) were observed among outdoor/trail related businesses.

Nearly two-thirds of the respondents mentioned that they experienced at least some increase in their sales/revenue as a direct result of the trail and/or 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.

Key Findings

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 dong so with such great proficiency that it is motivating them to expand their current list of operations and obligations. Furthermore, the average wage expenditure confirms that the businesses surveyed in Phase I are stimulating these economies by putting $2,078,956 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 currents businesses to further embrace the trail system and its possibilities.

Next year's Phase IIII study will collect 2008 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 Phase III 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.

Detailed Report

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 Phase I 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.

Therefore, the following report will focus on the Phase I results exclusively.

Total Analysis – Phase I 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 <u>increased</u> 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.

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)

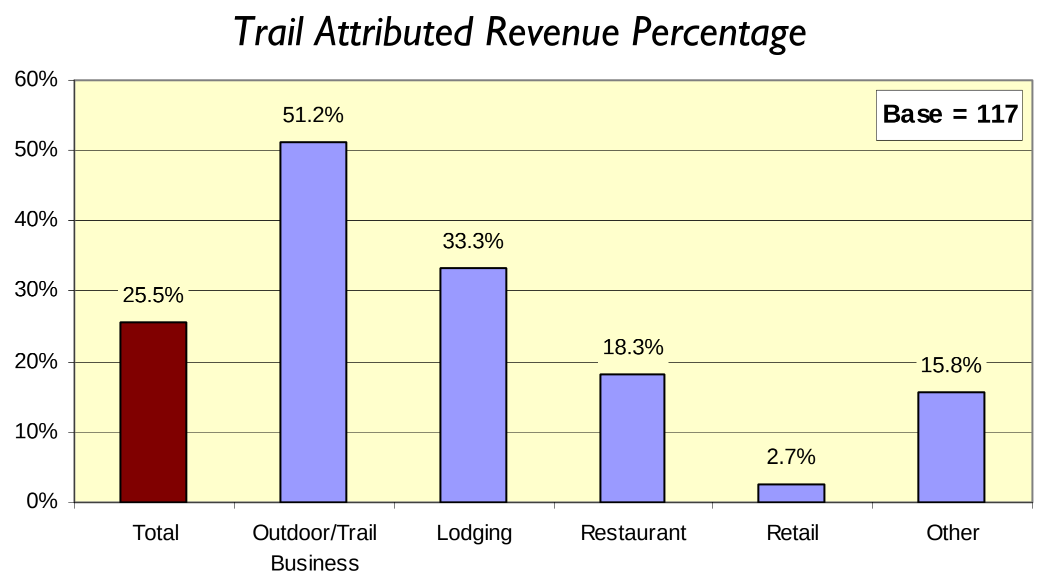
	County					
	Total	Allegheny, PA	West-moreland, PA	Fayette, PA	Somerset, PA	Allegany, MD
Bases:	55	7*	6*	10*	9*	9*
2006 gross revenue	$771,522	$1,680,167	$402,333	$380,000	$395,758	$401,971
2007 gross revenue	$773,310	$1,706,032	$473,000	$406,550	$459,835	$378,222
% difference	0.2%	1.5%	17.6%	7.0%	16.2%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



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

	Total	Business Type: 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).

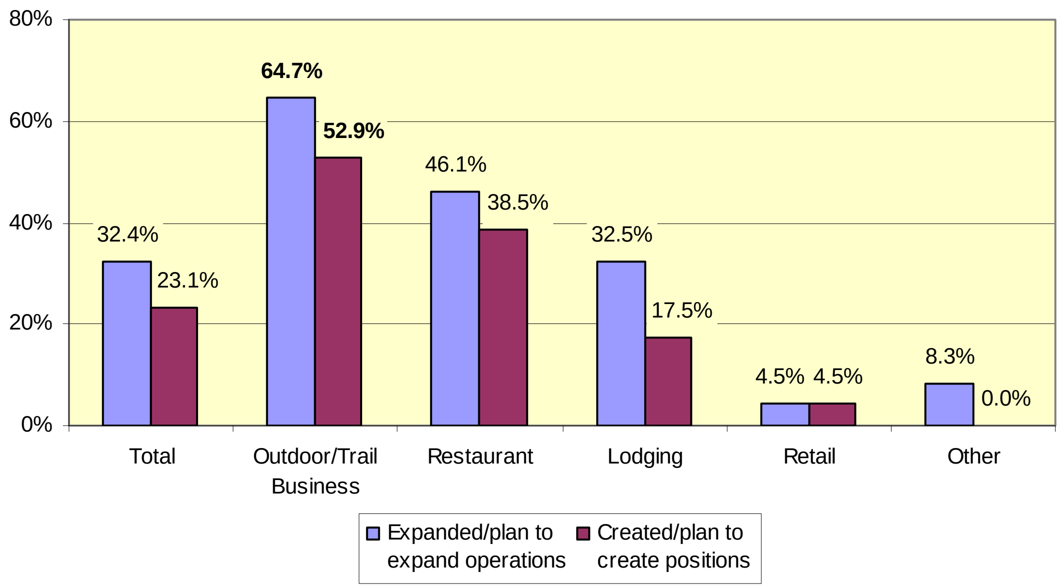
Even though the majority of the respondents on average reported that they have not made any changes, the existence and proximity of the trail not only influenced several businesses to make *expansions/additions* to their *products, services,* and/or *facilities* but also caused them to *modify their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

- 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).

- 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.

Research Graphs and Tables

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 [orange] were significantly higher than the values highlighted in [green].

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 [orange] were significantly higher than the values highlighted in [green].

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**

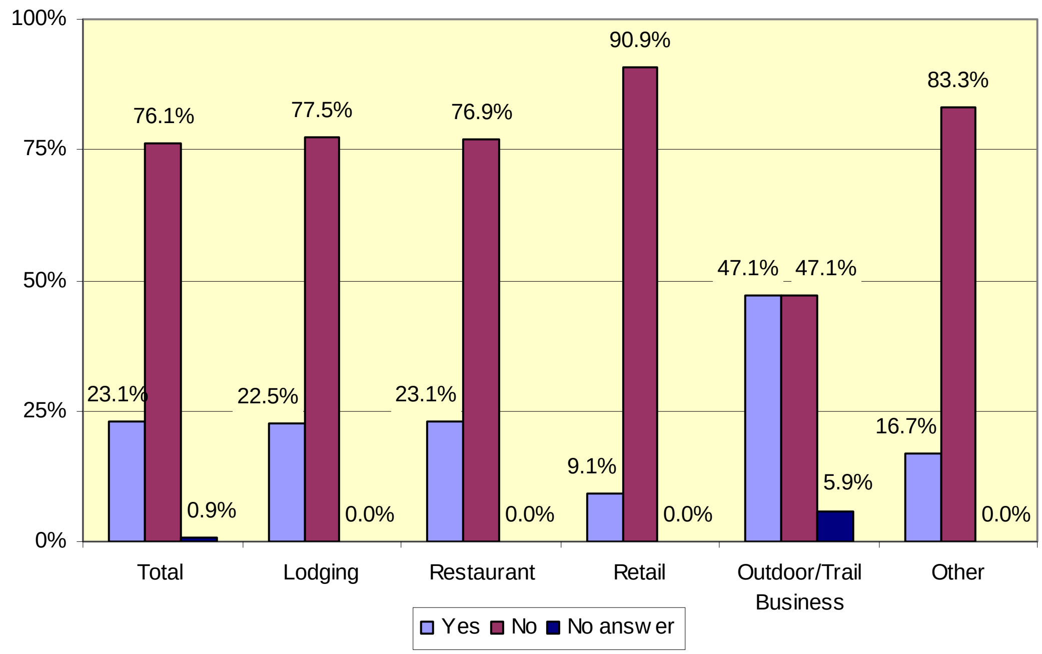
Values highlighted in [orange] were significantly higher than the values highlighted in [green].

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

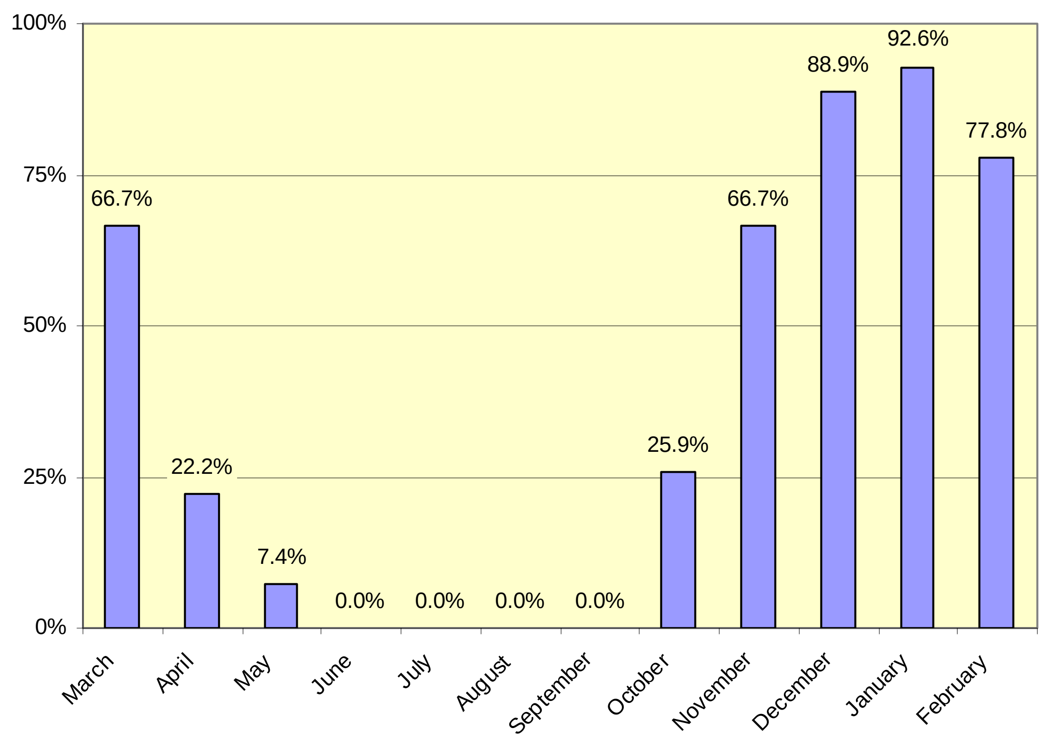
Seasonal Closing



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.*

Months Closed



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%
Mean	*23.7*	*37.3*	*5.4*	*8.5*	*11.3*	*60.3*

***Caution: small base sizes**

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

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%
Mean	*20.5*	*42.2*	*9.2*	*13.9*	*7.6*	*18.5*

***Caution: small base sizes**

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

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.*

	Total	Business Type: 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%
Mean	*15.1*	*26.3*	*4.0*	*7.7*	*2.5*	*25.3*

****Caution: small base sizes***

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

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.*

	Total	Business Type: 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%
Mean	*12.3*	*21.6*	6.2	11.7	*3.1*	13.0

****Caution: small base sizes***

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

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 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%
Mean	*44.2*	*48.3*	*38.1*	*39.6*	*54.2*	*40.1*

***Caution: small base sizes**

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

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.*

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%
Mean	*23.1*	*23.2*	*21.9*	*24.4*	*20.9*	*26.6*

***Caution: small base sizes**

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

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 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%
Mean	*37.0*	*35.7*	*36.7*	*38.9*	*39.6*	*35.5*

****Caution: small base sizes***

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

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.*

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%
Mean	*19.3*	*17.4*	*19.1*	*22.7*	*14.1*	*23.3*

****Caution: small base sizes***

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

Q#6
What impact did the trail have on the location of your business?

Note: *Q6 was asked of all respondents.*

Influence of Trail on Location of Business

	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 infuence	*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 [orange] were significantly higher than the values highlighted in [green].

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.*

Impact of Trail on Business in Past Year

	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 [orange] were significantly higher than the values highlighted in [green].

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.*

Impact of Trail on Operations Decisions

		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 [orange] were significantly higher than the values highlighted in [green].

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.*

Type of Expansion

		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 not 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**

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 [orange] were significantly higher than the values highlighted in [green].

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 [orange] were significantly higher than the values highlighted in [green].

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.*

Gross Revenue in 2007

	Total	Business Type: 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 [orange] were significantly higher than the values highlighted in [green].

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.*

Percentage of Revenue Attributed to the Trail

	Total	Business Type: 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**

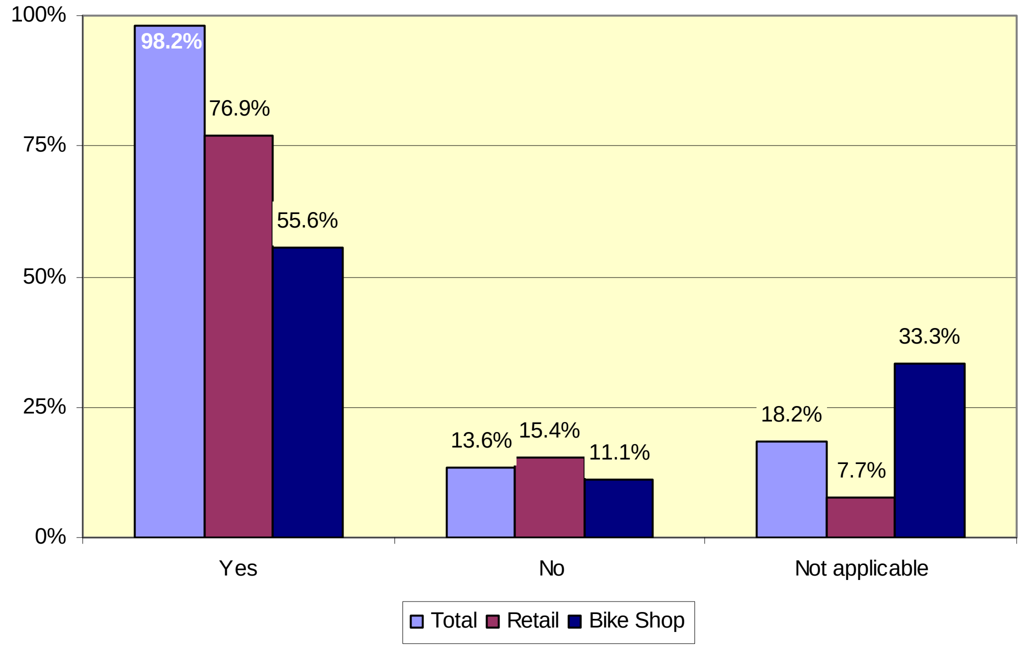
Values highlighted in [orange] were significantly higher than the values highlighted in [green].

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

	Total	Business Type: 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%
Unable to Categorize	30.0%	42.5%	30.8%	27.2%	17.6%	8.3%

****Caution: small base sizes***

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

Q#12a
What is your ZIP code?

Note: *Q12a was asked of all respondents.*

ZIP Code – Trail Towns

		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%
Other/Refused	57.3%	75.0%	42.3%	50.0%	47.1%	58.3%

***Caution: small base sizes**

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

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.*

Actions Taken to Attract and/or Cater to Trail Users

		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 [orange] were significantly higher than the values highlighted in [green].

Appendix A – 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

   (If none or downsizing, please go to Q9)

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…?

    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?

    ______________________ **%**

OVER →

(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

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

Appendix B – County Comparison Tables

All Counties

	2007	1998
Bases:	***117***	***89***
Business Location		
Allegheny County, PA	17%	30%
Westmoreland County, PA	9%	12%
Fayette County, PA	15%	24%
Somerset County, PA	15%	26%
Allegany County, MD	17%	0%
Other	27%	8%
Type of Business		
Lodging	35%	13%
Restaurant/tavern/café/ice cream shop	22%	37%
Retail	19%	28%
Outdoor/Trail related businesses	15%	17%
Other	9%	34%
Age of Business		
Less than a year	3%	10%
1-2 years	15%	19%
3-5 years	14%	21%
6-10 years	18%	7%
11-20 years	25%	18%
21-40 years	12%	11%
More than 40 years	14%	13%
Trail Influence on Location		
Very strong influence	23%	13%
Strong influence	12%	9%
Some infuence	27%	16%
No influence	38%	60%
Peak Season		
Bike season	88%	85%
Winter months	19%	26%
Summer months	29%	45%
Year round	2%	18%
Off-peak Season		
Winter months	81%	59%
Spring months	37%	22%
Summer months	7%	6%
None	3%	0%

All Counties

	2007	1998
Bases:	***117***	***89***
Percent Business from Trail		
None	16%	15%
Less than 5%	23%	27%
5% to 10%	10%	22%
11% to 50%	16%	22%
51% to 100%	19%	11%
Peak Season - Number of Employees		
1-5 person	44%	39%
6-10 people	15%	30%
11-25 people	23%	11%
More than 25	15%	8%
Off-peak Season - Number of Employees		
1-5 person	49%	43%
6-10 people	15%	17%
11-25 people	13%	4%
More than 25	10%	9%
Peak Season - Work Hours per Week		
15 hours or less	3%	9%
16 to 30 hours	39%	15%
31 to 40 hours	39%	40%
More than 40 hours	11%	13%
Off-peak Season - Work Hours per Week		
15 hours or less	6%	12%
16 to 30 hours	37%	18%
31 to 40 hours	33%	26%
More than 40 hours	3%	8%
Plans to Expand		
Yes	33%	44%
No	68%	55%
Impact of Completion (2008) / *Estimated Impact if Comleted (1999)* **		
Increased revenue significantly / *Extremely positive*	18%	*28%*
Increased revenue somewhat / *Positive*	47%	*46%*
Has had no impact / *No impact*	36%	*21%*
Decreased revenue somewhat / *Negative*	0%	*1%*
Decreased revenue significantly / *Extremely negative*	0%	*2%*

*****Note: Questions was changed in response to the completion of the trail***

Allegheny County, PA

	2007	1998
Bases:	***21****	***27****
Type of Business		
Lodging	29%	7%
Restaurant/tavern/café/ice cream shop	10%	41%
Retail	29%	22%
Outdoor/Trail related businesses	14%	19%
Other	18%	41%
Age of Business		
Less than a year	0%	15%
1-2 years	14%	15%
3-5 years	19%	30%
6-10 years	10%	4%
11-20 years	38%	11%
21-40 years	0%	7%
More than 40 years	19%	19%
Trail Influence on Location		
Very strong influence	14%	11%
Strong influence	10%	11%
Some infuence	33%	11%
No influence	43%	59%
Peak Season		
Bike season	76%	75%
Winter months	29%	37%
Summer months	38%	48%
Year round	0%	26%
Off-peak Season		
Winter months	81%	38%
Spring months	24%	11%
Summer months	10%	12%
None	0%	0%

****Caution: small base sizes***

Allegheny County, PA

	2007	1998
Bases:	***21****	***27****
Percent Business from Trail		
None	29%	15%
Less than 5%	38%	22%
5% to 10%	5%	22%
11% to 50%	5%	26%
51% to 100%	14%	11%
Peak Season - Number of Employees		
1-5 person	33%	37%
6-10 people	14%	22%
11-25 people	14%	15%
More than 25	33%	11%
Off-peak Season - Number of Employees		
1-5 person	33%	37%
6-10 people	10%	7%
11-25 people	14%	4%
More than 25	29%	11%
Peak Season - Work Hours per Week		
15 hours or less	5%	15%
16 to 30 hours	33%	7%
31 to 40 hours	43%	41%
More than 40 hours	14%	15%
Off-peak Season - Work Hours per Week		
15 hours or less	5%	15%
16 to 30 hours	38%	11%
31 to 40 hours	38%	19%
More than 40 hours	0%	7%
Plans to Expand		
Yes	19%	44%
No	81%	52%
Impact of Completion (2008) / *Estimated Impact if Comleted (1999)* **		
Increased revenue significantly / *Extremely positive*	6%	*33%*
Increased revenue somewhat / *Positive*	35%	*41%*
Has had no impact / *No impact*	59%	*26%*
Decreased revenue somewhat / *Negative*	0%	*0%*
Decreased revenue significantly / *Extremely negative*	0%	*0%*

***Note: Questions was changed in response to the completion of the trail**

**Caution: small base sizes*

Westmoreland County, PA

	2007	1998
Bases:	***10****	***11****
Type of Business		
Lodging	20%	0%
Restaurant/tavern/café/ice cream shop	30%	36%
Retail	20%	45%
Outdoor/Trail related businesses	30%	9%
Other	0%	10%
Age of Business		
Less than a year	10%	0%
1-2 years	10%	36%
3-5 years	30%	9%
6-10 years	20%	9%
11-20 years	20%	18%
21-40 years	0%	18%
More than 40 years	10%	13%
Trail Influence on Location		
Very strong influence	40%	9%
Strong influence	10%	0%
Some infuence	10%	0%
No influence	40%	91%
Peak Season		
Bike season	90%	36%
Winter months	20%	27%
Summer months	0%	36%
Year round	0%	27%
Off-peak Season		
Winter months	90%	45%
Spring months	20%	18%
Summer months	10%	0%
None	0%	0%

***Caution: small base sizes**

Westmoreland County, PA

	2007	1998
Bases:	***10****	***11****
Percent Business from Trail		
None	10%	27%
Less than 5%	20%	55%
5% to 10%	0%	9%
11% to 50%	10%	0%
51% to 100%	40%	9%
Peak Season - Number of Employees		
1-5 person	70%	64%
6-10 people	10%	36%
11-25 people	10%	0%
More than 25	0%	0%
Off-peak Season - Number of Employees		
1-5 person	50%	55%
6-10 people	10%	27%
11-25 people	10%	4%
More than 25	10%	9%
Peak Season - Work Hours per Week		
15 hours or less	10%	9%
16 to 30 hours	60%	36%
31 to 40 hours	20%	27%
More than 40 hours	10%	18%
Off-peak Season - Work Hours per Week		
15 hours or less	10%	9%
16 to 30 hours	40%	27%
31 to 40 hours	30%	36%
More than 40 hours	0%	9%
Plans to Expand		
Yes	40%	36%
No	60%	64%
Impact of Completion (2008) / *Estimated Impact if Comleted (1999)* **		
Increased revenue significantly / *Extremely positive*	25%	*9%*
Increased revenue somewhat / *Positive*	38%	*27%*
Has had no impact / *No impact*	38%	*45%*
Decreased revenue somewhat / *Negative*	0%	*9%*
Decreased revenue significantly / *Extremely negative*	0%	*9%*

*****Note: Questions was changed in response to the completion of the trail***

****Caution: small base sizes***

Fayette County, PA

	2007	1998
Bases:	***17****	***21****
Type of Business (multiple mentions were not accepted in the 2008 survey)		
Lodging	35%	19%
Restaurant/tavern/café/ice cream shop	12%	38%
Retail	6%	24%
Outdoor/Trail related businesses	29%	38%
Other	18%	29%
Age of Business		
Less than a year	0%	14%
1-2 years	12%	29%
3-5 years	12%	10%
6-10 years	6%	0%
11-20 years	12%	24%
21-40 years	41%	19%
More than 40 years	18%	5%
Trail Influence on Location		
Very strong influence	18%	24%
Strong influence	24%	10%
Some infuence	12%	19%
No influence	47%	48%
Peak Season		
Bike season	100%	86%
Winter months	0%	10%
Summer months	59%	53%
Year round	0%	10%
Off-peak Season		
Winter months	71%	77%
Spring months	65%	53%
Summer months	6%	0%
None	0%	0%

Caution: small base sizes

Fayette County, PA

	2007	1998
Bases:	***17****	***21****
Percent Business from Trail		
None	24%	19%
Less than 5%	18%	14%
5% to 10%	18%	33%
11% to 50%	24%	14%
51% to 100%	12%	14%
Peak Season - Number of Employees		
1-5 person	35%	24%
6-10 people	12%	33%
11-25 people	35%	5%
More than 25	18%	19%
Off-peak Season - Number of Employees		
1-5 person	53%	24%
6-10 people	24%	14%
11-25 people	6%	5%
More than 25	6%	19%
Peak Season - Work Hours per Week		
15 hours or less	0%	5%
16 to 30 hours	12%	14%
31 to 40 hours	65%	48%
More than 40 hours	12%	5%
Off-peak Season - Work Hours per Week		
15 hours or less	0%	14%
16 to 30 hours	18%	19%
31 to 40 hours	47%	29%
More than 40 hours	6%	0%
Plans to Expand		
Yes	41%	62%
No	59%	38%
Impact of Completion (2008) / *Estimated Impact if Comleted (1999)* **		
Increased revenue significantly / *Extremely positive*	21%	*38%*
Increased revenue somewhat / *Positive*	43%	*48%*
Has had no impact / *No impact*	36%	*10%*
Decreased revenue somewhat / *Negative*	0%	*0%*
Decreased revenue significantly / *Extremely negative*	0%	*5%*

*****Note: Questions was changed in response to the completion of the trail***

****Caution: small base sizes***

Somerset County, PA

	2007	1998
Bases:	***18****	***23****
Type of Business		
Lodging	33%	26%
Restaurant/tavern/café/ice cream shop	33%	35%
Retail	17%	30%
Outdoor/Trail related businesses	6%	0%
Other	11%	39%
Age of Business		
Less than a year	0%	4%
1-2 years	17%	9%
3-5 years	11%	26%
6-10 years	28%	13%
11-20 years	17%	22%
21-40 years	11%	9%
More than 40 years	17%	17%
Trail Influence on Location		
Very strong influence	39%	4%
Strong influence	17%	9%
Some infuence	28%	22%
No influence	17%	65%
Peak Season		
Bike season	94%	86%
Winter months	28%	26%
Summer months	28%	35%
Year round	11%	9%
Off-peak Season		
Winter months	78%	77%
Spring months	39%	34%
Summer months	11%	13%
None	11%	0%

***Caution: small base sizes**

Somerset County, PA

	2007	1998
Bases:	***18****	***27****
Percent Business from Trail		
None	6%	4%
Less than 5%	6%	39%
5% to 10%	11%	17%
11% to 50%	33%	35%
51% to 100%	11%	4%
Peak Season - Number of Employees		
1-5 person	44%	48%
6-10 people	17%	30%
11-25 people	28%	13%
More than 25	6%	0%
Off-peak Season - Number of Employees		
1-5 person	50%	52%
6-10 people	22%	26%
11-25 people	11%	4%
More than 25	0%	4%
Peak Season - Work Hours per Week		
15 hours or less	0%	4%
16 to 30 hours	39%	9%
31 to 40 hours	33%	39%
More than 40 hours	11%	22%
Off-peak Season - Work Hours per Week		
15 hours or less	11%	4%
16 to 30 hours	39%	26%
31 to 40 hours	17%	22%
More than 40 hours	6%	17%
Plans to Expand		
Yes	39%	30%
No	61%	65%
Impact of Completion (2008) / *Estimated Impact if Comleted (1999)* **		
Increased revenue significantly / *Extremely positive*	19%	*26%*
Increased revenue somewhat / *Positive*	69%	*48%*
Has had no impact / *No impact*	13%	*22%*
Decreased revenue somewhat / *Negative*	0%	*0%*
Decreased revenue significantly / *Extremely negative*	0%	*0%*

*****Note: Questions was changed in response to the completion of the trail***
****Caution: small base sizes***

Appendix C – 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* (8.5%–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).

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 <u>not</u> 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 <u>not</u> 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%.

Seasonal Staffing Trends by Business Type

(Average Number of Employees)

		Total	Business Type				
			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
	% reduction	***-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
	% reduction	***-40%***	***-49%***	***-32%***	***-16%***	***-59%***	***-30%***

****Caution: small base sizes***

Appendix D – Calculated Receipts Model

Appendix D

In the 1998 Economic impact study, researchers calculated the amount of total sales (calculated receipts) that a business received from trail users by performing a calculation that included the following variables

- Average number of employees staffed:
  - Full-time/peak season **(FP)**
  - Full-time/off-peak season **(FO)**
  - Part-time/peak season **(PP)**
  - Part-time/off-peak season **(PO)**
- Average work hours per week:
  - Full-time employees/peak season **(FHP)**
  - Full-time employees/off-peak season **(FHO)**
  - Part-time employees/peak season **(PHP)**
  - Part-time employees/off-peak season **(PHO)**
- Number of months closed **(CM)**
- Number of months in off-peak season **(OM)**
- Estimated percentage of annual gross revenue attributed to the trail **(%)**
- Average employee wages by industry, derived from U.S. Bureau of Labor Statistics data **(AW)**

	Average Wage		
Occupation	**1998**	**Phase I**	**% +/-**
Retail/Cashiers	$5.98	$8.06	25.8%
Restaurant/Food service worker	$6.29	$7.86	20.0%
Lodging/Maids and housemen	$8.18	$11.14	26.6%

- Average ratio of earned revenue to such wages within a particular industry, derived from U.S. Bureau of Labor Statistics data **(R)**

	Revenue/Wage Ratio	
Industry	**1998**	**Phase I**
Retail	9%	10%
Restaurant	26%	28%
Outdoor/Sporting Goods	8%	10%
Lodging	33%	30%

The following pages will model this formula in a "step-by-step" equation format using the variables listed above.

First, the total hours worked by all employees during the months of the Peak Season (**TPH**) and the months of the Off-Peak Season (**TOH**) must be determined using the following equation:

		FULL-TIME HOURS WORKED/WEEK		PART-TIME HOURS WORKED/WEEK			NUMBER OF MONTHS
		PEAK SEASON					
TPH	=	(FP x FHP)	+	(PP x PHP)	**x 4.25**	x	(12 - OM - CM)
		OFF-PEAK SEASON					
TOH	=	(FO x FHO)	+	(PO x PHO)	**x 4.25**	x	OM
					WEEK TO MONTH MULTIPLIER		

Next, using the appropriate average hourly wage **(AW)** for employees working in a specific industry that is published by the U.S. Bureau of Labor Statistics, the following equation is used to determine the total dollar amount that was paid to employees in wages for the time they spent accommodating/addressing trail attributed revenue sources **(TTW)**:

		TOTAL HOURS WORKED (SHEET A)		PERCENTAGE OF REVENUE ATTRIBUTED TO TRAIL RELATED BUSINESS		AVERAGE HOURLY WAGE
TTW	=	**(TPH + TOH)**	x	**%**	x	**AW**

Finally, using the appropriate revenue/wage ratio **(R)** published by the U.S. Bureau of Labor Statistics, which states the average amount of a businesses total revenue that is paid out in wages for a specific industry, **Calculated Receipts** are determined by performing the following equation:

$$\text{Calculated Receipts} = \frac{\text{TTW}}{\text{R}}$$

TTW	TOTAL WAGES ATTRIBUTED TO TRAIL BUSINESS (PREVIOUS EQUATION)
R	REVENUE TO WAGE RATIO

Phase II: Trail User Study (2008)

Table of Contents

Background and Methodology

Background and Methodology

Background and Objectives

The Progress Fund's Trail Town Program, Laurel Highlands Visitors Bureau (LHVB), and the 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 Great Allegheny Passage (completed May 2008)
- Phase II, marketing research among trail users and trail inquirers, conducted throughout 2008
- Phase III, follow-up economic impact research among businesses, to be conducted in 2009

This report details the findings from the Phase II Trail User Study, which was undertaken to update data from two previous user surveys. However, the 2002 user study was conducted by placing mail-in surveys on vehicles before the trail had been completed and the 2006 user study was only conducted during the months of August through September.

The 2008 Trail User Study (Phase II) was aimed to address the following objectives:

- To profile visitors' usage of the trail (i.e., how often they visit, purpose of visit, starting and ending locations, etc.).
- To determine group characteristics (i.e., number in party, ages, gender, income).
- To establish the ZIP code origin of the visitor party.
- To determine mode of transportation to arrive at trail and one-way distance traveled.
- To determine how much was spent in various categories such as bike rental, equipment, food and drink, gasoline, retail shopping, grocery/ convenience store purchases, lodging, etc.
- To determine how trail users originally became aware of the trail.
- To determine trail users' satisfaction levels with the trail.
- To identify any unmet needs of trail users.
- To determine reasons for not visiting the trail areas among prospective visitors that did not follow through with a visit.

Methodology

Campos Inc designed the survey instrument with input and approval from the Trail Town Program, 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.

The survey, conducted from May 23, 2008 through October 26, 2008, was administered by volunteers to trail users at specific locations along the trail and the completed surveys were entered online. Trailhead leaders were asked to schedule volunteers according to a master schedule to ensure surveys were conducted about equally on weekends and weekdays. Volunteers were instructed to randomly select trail users who were leaving the trail or taking a break from trail use and only if they were in the trailhead parking lot or the visitor center (where applicable). The survey, on average, took the volunteers approximately 8 minutes to administer. Overall, more than 1,000 hours were invested by volunteers over the course of the 6 month period administering surveys and entering data; ultimately saving the Trail Town Program, LHVB, and ATA upwards of $25,000 in potential data collection costs.

A total of 1,272 surveys were administered at eight different locations along the Great Allegheny Passage – six in Pennsylvania and two in Maryland. The PA locations were Confluence, Connellsville, Meyersdale, Ohiopyle, Rockwood, and West Newton. The MD locations were Cumberland and Frostburg. After collection had started, volunteers observed unique traffic patterns at two of the trailhead locations. As a result these locations were expanded allowing volunteers to also administer surveys at trailheads that were in very close proximity to their originally designated position. The two trailheads included in the expansion were Cedar Creek Park, PA, (attributed to West Newton, PA) and Big Savage Tunnel, MD (attributed to Frostburg, MD). Of the 1,272 surveys collected, 664 were collected on weekdays, 571 were collected on the weekend days, and 37 were collected during summer holidays (Memorial Day, 4th of July, or Labor Day).

In addition to the intercept survey, a supplemental sample was collected online from October 8, 2008 through November 29, 2008. Invitations were sent via e-mail to a list of individuals that had requested information about the trail within the past year. The survey instrument for this supplemental sample was nearly identical to the intercept survey with the addition of several qualifying questions. The survey took an average of 10 minutes to complete online and of the 302 respondents that completed the supplemental survey, 228 visited/or planned to visit the trail and 74 respondents reported they had not/did not plan to visit. Non-visitors were subsequently asked a series of unique questions aimed at discovering reasons for not visiting the trail/region and alternative plans/trips.

All completed surveys were edited, coded, computer tabulated, and analyzed by Campos Inc. Data tables are supplied under a separate cover.

Copies of the questionnaires can be found in the Appendix.

Analytical Notes

- For this study, the total intercept sample size of 1,272 yielded results with a statistical accuracy of ±2.75% at the 95% confidence level and the supplemental sample size of 302 yielded results with a statistical accuracy of ±5.64% at the 95% confidence level. This means that there is a one in twenty (20) chance that the "true" measurements will fall outside of these ranges.
- Where appropriate, statistical testing was conducted to determine significant differences between *locations of interview*, *typical seasonal use*, and *overnight stays* for the intercept sample.
- 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.

Key Findings

Key Findings

Overview

- 40.8% of the trail users surveyed planned an overnight stay as part of their trail visit.
  - 34.8% of overnight visitors earn an annual household income of over $100,000 (compared to just 6.2% of local trail users earning the same amount).
  - Overnight visitors spend an average of $98 a day in trail communities and on lodging, compared to local trail users spending an average of $13 each trail use.
  - 96.9% of overnighters reported biking as their primary activity while using the trail, versus 88.1% of all trail users reporting biking as their primary activity.
- The average distance traveled to arrive at the trailhead was 131 miles, and 289 miles for overnighters. The mean distances were 20 miles and 90 miles, respectively.
  - Surveyed trail users traveling 50 miles or more to get to the trail spent approximately twice as much in trail communities as those traveling less than 50 miles.
- The majority of trail users that were surveyed started and ended their trips in the same location.
- The majority of surveyed trail users (83.1%) were 35 years of age or older, with the age category of 45-54 (28.0%) being mentioned most often.
- The majority (65.1%) of trail users that were surveyed were male.
- Trail users from 670 unique postal codes were surveyed.
- The most frequently mentioned suggestion for improving the trail was better signage both on and off the trail.

Conclusions and Recommendations

It must be noted that differences in methodologies and data reporting made comparisons between the 2008 results and the previous studies difficult, if not impossible, in some cases. Thus, we didn't note trends where we felt the reliability of the comparisons would be suspect. Furthermore, projections/ estimations of the 2008 trail users' spending were not performed because trail counter data was not available. However, we feel the Phase III report, to be conducted in early 2009, will provide reliable economic impact data if business cooperation is high.

The following trail user profile was observed in the 2008 Study.

- When it came to gaining awareness of the trail, regardless of where visitors lived or the distance they traveled, the most frequently mentioned method was through family and friends. Furthermore, outside of family/friends/bike store owners, visitors most frequently mentioned learning of the trail from the internet.
  - We recommend that all organizations/businesses that are located along and/or promote the trail maintain or enhance their web site content, key word search, user-friendliness, etc.–especially since nearly one-third of the online inquirers that visited the trail learned of it through the internet.
- Trail users were considerably more likely to be biking either by themselves or with friends for recreational purposes and nearly all visitors provided extremely positive ratings in regards to the experience on the trail.
- Similar to previous years, the majority of the trail users resided in Southwestern PA within relatively close proximity to the trail. However, despite being difficult to quantify, a substantial increase was observed in the number of 2008 trail users living outside of this area and in the average distance traveled one-way by trail users to their starting location. 2008 trail users were also significantly more likely to plan/participate in multiple day trips and report/plan overnight stays in conjunction to their trip.

On average, trail users spent $54 per person and the most common spending categories were restaurants, beverages, and lodging.

- As was observed in 2002, differences in spending habits were closely tied to the aforementioned trends. Trail users that reported overnight stays were significantly more likely than local visitors to reporting spending and in addition, they averaged spending more per person ($98 vs. $13, respectively). Verifying the fact that these visitors are not only making a significant contribution to the economic development of the trail towns through nightly accommodations fees, but also by more frequently purchasing the basic items associated with travel on the trail such as beverages, restaurants, snacks, ice cream, and souvenirs.
  - Therefore, Campos Inc recommends that tourism entities and businesses should concentrate their marketing efforts in the larger metropolitan areas in the Mid-Atlantic Region. After mapping the home zip codes of trail users, the targeting of three regions in particular is recommended: The Keystone Corridor (the area between Harrisburg, PA and Philadelphia, PA); Cleveland, OH; and Baltimore, MD/Washington DC.
  - Since the vast majority of the trail users reported that they were biking, It is recommended that tourism entities' and trail businesses' marketing efforts target bike/recreation shops/stores and bike/recreational groups/organizations. Attracting visitors from these stores/organizations to the trail through package deals or discounts will likely increase the number of trail promoters and ultimately spread awareness through family and friends.

The most frequently mentioned recommendation/suggestion from trail users for both the trail and the trail communities was the improvement of trail signage.

- On the trail, the resounding desire from trail users was for trail signage to more closely resemble that of an "interstate highway." They wish to see markers at each of the trailheads indicating what items/services/amenities are available at each stop posted directly next to a map of the town.

- In the communities, trail users would like to see signs that better identify the location of trailheads (i.e., directional signs pointing towards the trails heads and improvement of signs identifying the destinations).
  - Campos Inc recommends the creation/posting of signs in the trail communities directing visitors to trailheads if they do <u>not</u> already exist. If these signs do exist it is recommended that they are re-evaluated to ensure their effectiveness.

- We also highly recommend the installation of "Trail Guides/Maps" at each trailhead similar to what is available online, if they do not already exist. These "Trail Guides" should be modifiable and should include not only information about the town's history, attractions, and available amenities, but also a map of the town and the distance in each direction to adjacent trailheads/towns. If these "Trail Guides/Maps" already exist it is recommended that are re-evaluated to ensure their effectiveness and accessibility.

Finally, Campos Inc recommends that future Trail User studies primarily focus on discovering visitors' usage patterns, satisfaction, and demographic profiles. This will allow the survey instrument to be substantially shorter, which in turn should increase trail user's cooperation rates and also decrease volunteer "burn-out." With calculations based solely on trail user's estimated spending and un-reliable trail counters, it is impossible for projections to be consistent from year to year and it is unlikely that they will ever be extremely accurate.

- The economic projections should instead be calculated by data collected among local trail businesses, as their estimations are based on sales/revenue records and not based on memory or planned, not actual, spending. Thus, it is extremely important to increase the number of business participating in the Phase III–Economic Impact Study, scheduled for 2009.
  - In conclusion, the 2008 Trail Users Study (Phase II) was extremely effective in detailing and updating our understanding of visitors' trail usage patterns, points of origin, and source of awareness. We recommend that they study be repeated every 2 or 3 years to identify changes over time.

The Progress Fund can use this (Phase II) data to show that the trail is bringing in tourism from outside of PA. The Phase III, economic impact data, can be used to communicate the importance of acquiring funding sources for the trail. For instance, funding may be needed in order to create/produce directional signage and/or Trail Guides/Maps as trail communities/businesses may not be able to support this promotion in the early stages of trail community development.

Detailed Report

In both 2002 and 2006, while the trail was still under construction and/or trail connections were just recently completed, important information was gathered from trail users at many of the same trailhead locations. It should be noted that the methodologies and survey instruments utilized in the previous studies were not identical to the 2008 study (accordingly, some of the trail towns were not yet as developed). Thus, a comparative analysis between the previous studies and the 2008 study is therefore limited.

The online supplemental sample, collected among trail inquirers, has been analyzed separately in the executive summary; where appropriate, similarities and/or differences to the intercept sample were highlighted in the section.

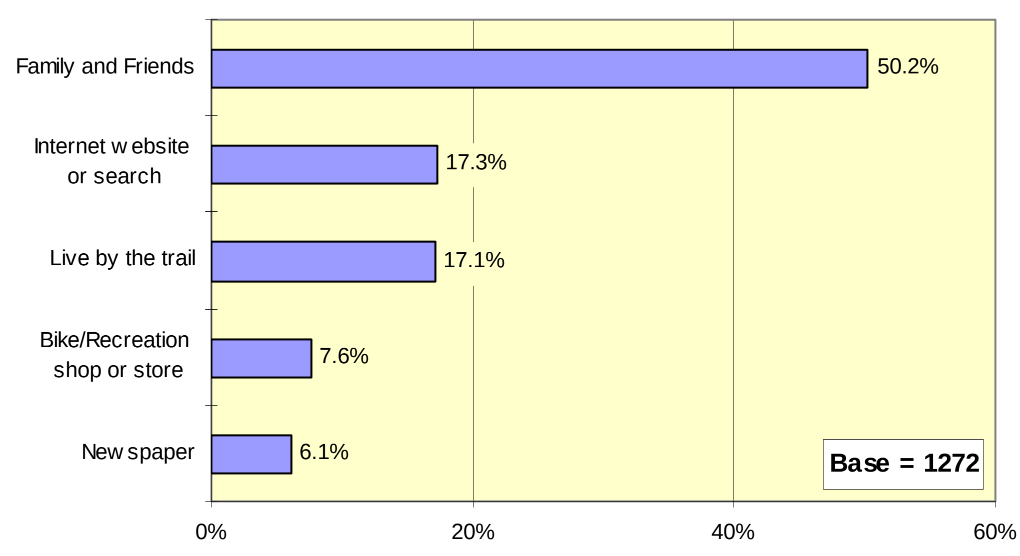
Total Analysis – 2008 Trail User Study

Based on the responses received from surveyed trail users, this summary will profile several key areas:

- Trail users' usage patterns
- Trail users' spending habits
- Trail users' group composition
- Trail users' satisfaction and suggestions

When trail users were asked how they originally heard of or found out about the trail, the most popular response by far was *family and friends*. The only other sources of awareness worthy of note were *internet* and/or the *live by the trail*.

Reported Source of Trail Awareness

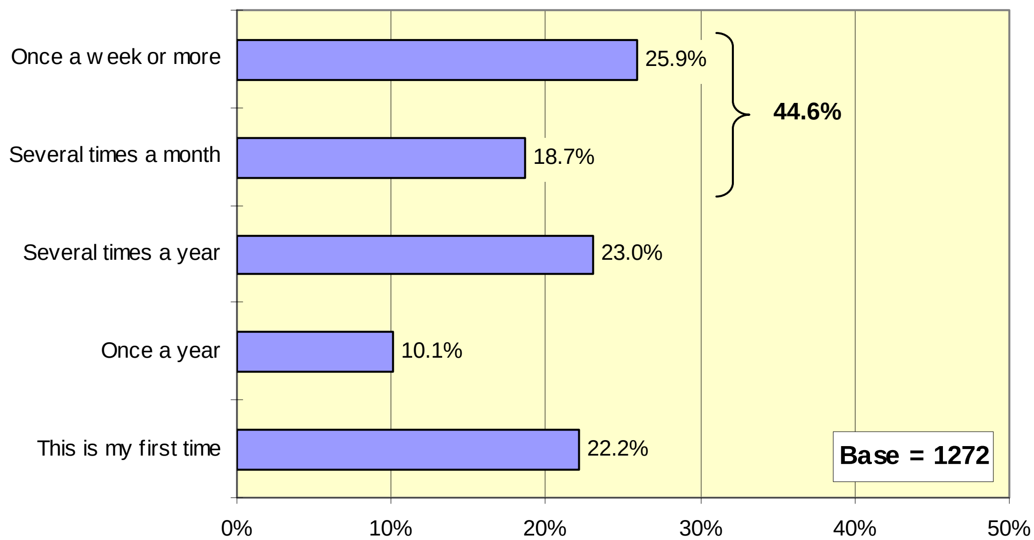


Trail Users' Usage Patterns

Trail users tended to visit the trail with at least one other person as only one-third stated that they were using the trail alone.

The majority of the respondents reported using the trail prior to being interviewed (i.e., not first time users), with nearly half stating that they used the trail at least *several times a month*.

Reported Frequency of Trail Use

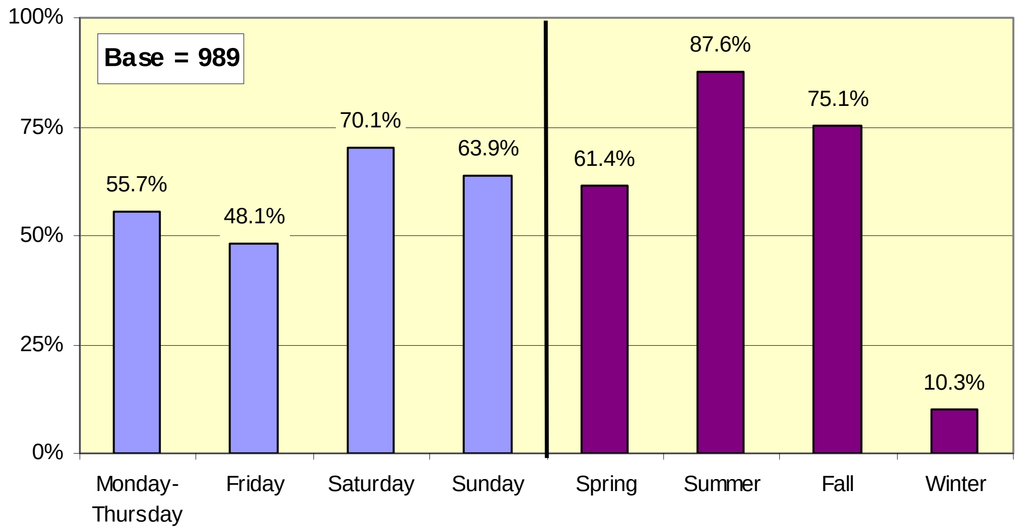


Accordingly, the majority of the respondents/ their group members planned to use the trail more than once this calendar year, with over one-third stating that they planned to use the trail *more than 10 times*.

Among those who had previously visited the trail, typical use was mentioned most often on *weekends* and during the *summer*. However, typical use of the trail during the *week* and during both the *fall* and *spring* seasons was reported by more than half of the respondents. The infrequent mentioning of *winter* could have been influenced by the dates that interviews were being administered.

See graph on the following page.

Reported Trail Use by Weekday/Season



Similar to previous years, the majority of the trail users mentioned living in Southwestern PA/Northern MD regions; however, the number of trail users that reported living in the Washington DC/Baltimore, Southeastern PA/the Keystone Corridor (Harrisburg to Philadelphia), and Cleveland, OH regions were also slightly higher compared to other metropolitan areas.

Reported Location of Residence

		Online Inquiry	
	Trail Users	Visitor	Non-Visitor
Bases:	***1272***	***228***	***74***
(Net) Pennsylvania	57.5%	32.5%	25.7%
-Southwestern, PA	*51.7%*	*21.9%*	*12.2%*
-Southeastern, PA and the Keystone Corridor	*3.1%*	*4.8%*	*8.1%*
(Net) Other	40.2%	61.0%	73.0%
-Cumberland, MD	*18.1%*	*3.1%*	*0.0%*
-Washington DC/Baltimore, MD	*6.6%*	*19.7%*	*21.6%*
-Cleveland, OH	*2.4%*	*6.6%*	*4.1%*

Among the remaining 13%, no singular region/city was reported by more than 2% of the respondents.

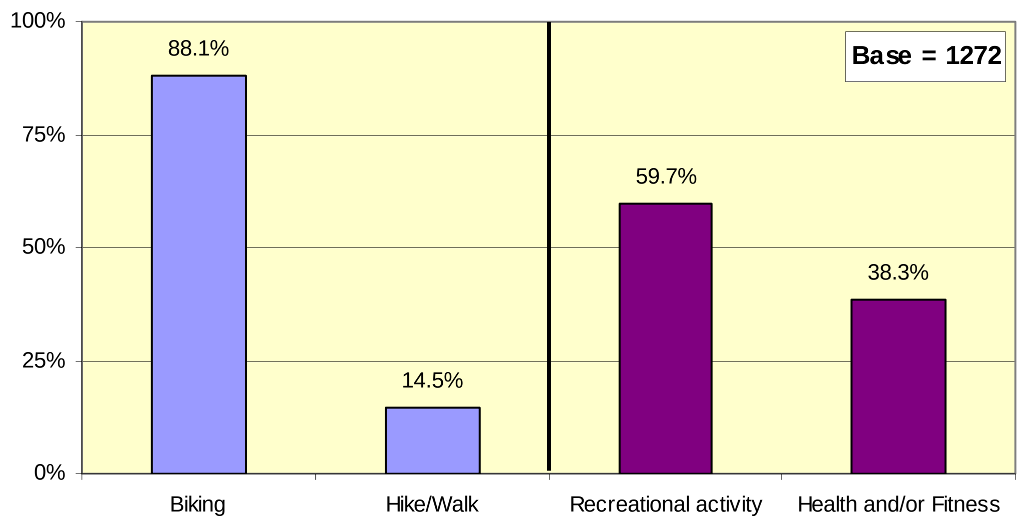
In addition, the majority of the trail users lived in major metropolitan areas; but, trail visitation occurring in the less densely populated areas between Ohiopyle and Frostburg was very high, suggesting that metropolitans were using the rural sections of trail more often. The average distance traveled by trail users to arrive at the trailhead was 131 miles, a significant increase over 2002 (44 miles).

However, this figure was likely skewed by several respondents that cited extremely large travel distances as over half reported traveling *less than 25 miles* and the median distance was 20 miles; median distance was not reported in 2002. Similar to previous years, the majority of visitors reported traveling to the trail either in *their own* or a *friend's car/truck/van* and one in five mentioned traveling to the trailhead on a *bike*.

When asked about their/their groups' primary reason for using the trail that day, the majority, six in ten, either directly or indirectly mentioned *recreational activities* and four in ten mentioned *fitness training* and/or *health and exercise*. This differed slightly from what was observed among trail users in 2006 where over one half cited *exercise/health*.

At the time they were interviewed, trail users/groups reported to participating in a wide variety of activities; however, *bike* riding was mentioned considerably more often than any of the others and *hiking/walking* was the only other activity mentioned by more than one in ten respondents.

Reported Trail Use Activity/Purpose



In order to participate in one of the aforementioned activities, only one in twenty trail users interviewed stated that they and/or one of their group members rented the equipment/gear they were using on the trail that day. The vast majority of the trail users and/or their group members brought all of their own equipment/gear with them to the trail.

Similar to what was observed in previous studies, *Ohiopyle* was once again among the most popular as a starting and/or ending point along the trail. Compared to previous studies, a significant increase in activity was observed in the southernmost locations along the trail. Also, the number of trail users/groups participating in "through" trips between Southwestern PA and Maryland trail towns increased dramatically (14.6% of total). However, starting and ending in the same trail location was cited most often.

See chart on the following page that compares respondents' Reported Starting Locations against their Reported Ending Locations.

Reported Starting Locations vs. Reported Ending Locations
(Sorted Geographically)

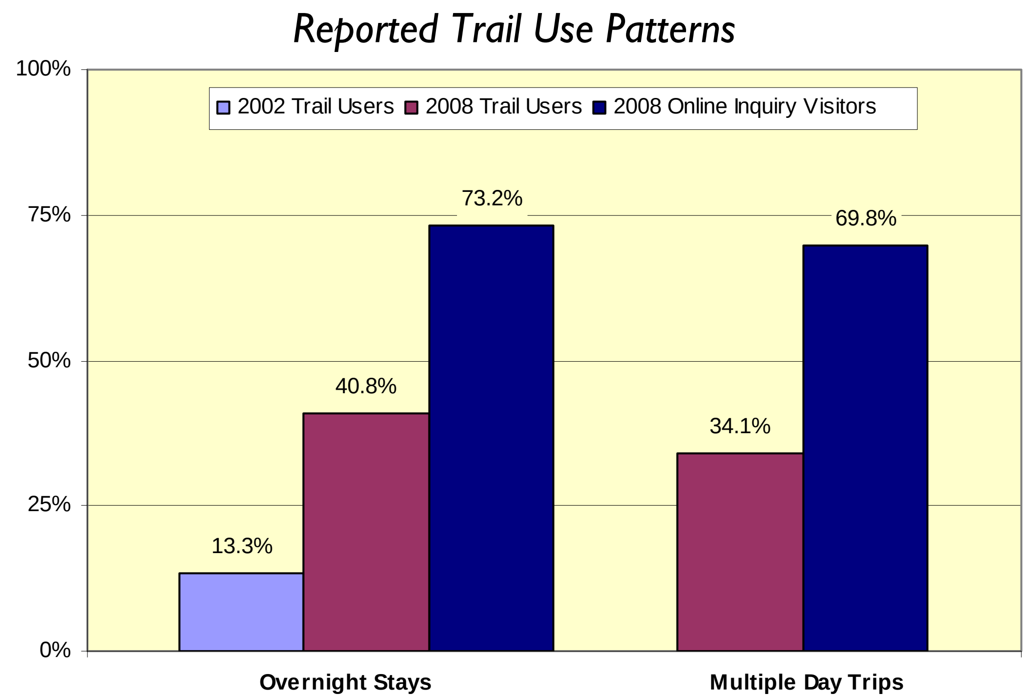
Ended on the Trail		Started on the Trail												
		Pitts-burgh	McKee-sport	Boston	Suters-ville	West Newton	Conn-ellsville	Ohio-pyle	Con-fluence	Rock-wood	Meyers-dale	Frost-burg	Cum-berland	Wash-ington DC
	Bases:	***47****	***58***	***105***	***25****	***114***	***129***	***163***	***73***	***116***	***57***	***166***	***84***	***46****
Pittsburgh	***28****	**2%**	7%	0%	0%	0%	0%	0%	0%	0%	4%	0%	**13%**	**22%**
McKeesport	***30****	2%	**7%**	0%	0%	0%	1%	0%	0%	0%	4%	1%	**13%**	**22%**
Boston	***69***	0%	0%	**52%**	0%	1%	0%	0%	0%	0%	2%	0%	**2%**	**20%**
Sutersville	***21****	0%	0%	0%	**84%**	0%	0%	0%	0%	0%	0%	0%	0%	0%
West Newton	***91***	0%	0%	1%	8%	**74%**	1%	1%	0%	1%	0%	1%	0%	0%
Connellsville	***97***	0%	0%	0%	0%	0%	**66%**	0%	0%	1%	0%	1%	4%	0%
Ohiopyle	***190***	4%	7%	1%	0%	2%	12%	**85%**	11%	1%	0%	4%	2%	0%
Confluence	***74***	0%	2%	5%	0%	1%	5%	4%	**64%**	3%	2%	0%	4%	0%
Rockwood	***101***	0%	2%	1%	0%	0%	0%	1%	0%	**79%**	2%	1%	1%	2%
Meyersdale	***45****	0%	2%	1%	0%	0%	0%	0%	3%	3%	**51%**	3%	2%	2%
Frostburg	***158***	0%	0%	0%	0%	1%	1%	2%	4%	2%	14%	**71%**	24%	0%
Cumberland	***162***	**17%**	**41%**	**23%**	0%	7%	1%	3%	11%	10%	23%	10%	**36%**	7%
Washington DC	***103***	**77%**	**36%**	**13%**	0%	10%	2%	2%	3%	2%	4%	2%	0%	**7%**

***Caution: small base sizes**

Start and End at the same location

Long Distance through trips

Most likely a direct result of the previously mentioned changes in travel/usage, the frequency at which overnight stays and multiple day trips were reported increased significantly in 2008 compared to 2002.



Trail users that had or were planning an overnight stay in conjunction with their trip were asked to name the type of accommodations at which they planned to stay. Approximately one-third each cited either a *campground* or *bed and breakfast*, followed closely by about one-quarter that mentioned a *hotel/motel/hostel*.

Trail Users' Spending Habits

Two-thirds of the trail users stated that they/their group had/planned to make purchases or rent equipment in the communities along the trail or trailhead that day.

They were then asked to estimate how much they spent/planned to spend on a variety of items/services in the communities the day of their visit. Trail users estimated their average spending to be $54 per person. However, differences in estimated spending were observed between the types of trail users. Those who reported an *overnight stay* in conjunction their trip averaged spending $98 per person, while both local trail users and those that mentioned participating in a *day trip* each averaged spending $13 per person. Respondents who had reported purchasing individual packages estimated average spending of $350 per package.

Those that had reported visiting the trail with at least one other person were then asked to estimate how much their group spent/planned to spend in the communities that day on the same items/services. Visitors estimated average spending of $144 per group and once again; differences in estimated spending were observed between the types of users. Those who reported an *overnight stay* in averaged spending $218 per group, *day trippers* averaged spending $42 per group, and *local* users averaged spending of $29 per group. Visitors who reported purchasing group packages estimated spending $2,970 per group package. The average group consisted of 4 members, including the respondent, and no specific package type was identified frequently enough to calculate independent averages.

- Trail users/their group members reported spending money on *beverages* and *restaurants* significantly more often than the other items/services.
- Based only on those who reported making purchases of each of the individual items/services, *transportation* fees had the largest per person average. The average, per person, spending estimates for *clothing*, *daily equipment rentals*, and *restaurants* were not quite as high as *transportation*, but were still significantly higher than the other items/services.

Reported Spending by Trail Users

	Trail Users Spending			
	Personal		Group	
	% Purchasing	Mean	% Purchasing	Mean
Bases:	***858***		***635***	
Total (excluding package & lodging costs)	67%	$23	33%	$74
Bases: Specific Items/Services	***858***	***14*-521***	***635***	***13*-415***
-Beverages	*56%*	*$6*	*52%*	*$18*
-Clothing	*7%*	*$22*	*5%*	*$57*
-Candy/Snacks	*21%*	*$6*	*21%*	*$17*
-Daily Equipment Rental (bikes, etc.)	*5%*	*$22*	*8%*	*$57*
-Ice Cream	*24%*	*$5*	*27%*	*$16*
-Restaurants	*56%*	*$20*	*65%*	*$65*
-Souvenirs	*10%*	*$13*	*13%*	*$25*
-Transportation (shuttling, taxi, etc.)	*2%*	*$51*	*2%*	*$117*
-Other (sunscreen, film, etc.)	*8%*	*$15*	*9%*	*$21*
Individual/Group Package Costs	8%	$350	11%	$2,970

Caution: small base sizes

The majority of the trail users that reported overnight stays while using the trail mentioned *two or more* stays in conjunction with their trip and estimated spending an average of $65 per night on accommodations. However, when analyzed by *accommodation type* differences were observed in average nightly costs. Trail users reported spending $24 per night at *campgrounds*, $96 per night at *bed and breakfasts*, and $87 per night when staying at a *hotel/motel/hostel*.

Similar to previous studies, the further trail users reported traveling to arrive the trail, or the further they traveled along the trail, the more they tended to spend on both items/services and accommodations. Respondents traveling 50 miles or more to get to the trail estimated spending/planning to spend approximately twice as much as those traveling less than 50 miles to get to the trail.

Trail User's Group Composition

Two-thirds of the trail users that were interviewed stated that they were visiting the trail with at least one other person and the average reported group size was four persons (including respondents). However, this average was most likely skewed high by several very large groups as pairs were reported most often, by four in ten, and the median group size was two.

According to trail users, nearly all of the groups primarily consisted of *friends/ family members*.

The majority of the trail users and their fellow group members were *35 years of age or older*, with the age category of *45-54* being mentioned most often for both.

Over six in ten trail users interviewed were *male* and the over half described their household income as being *$50K or more*.

Trail User's Satisfaction and Suggestions

By and large, trail user's satisfaction was extremely positive with fewer than 5% providing a rating lower than *good* when asked to rate their overall experience.

When asked to state what they liked most about the trail and/or the trail communities, the majority either stated that *no improvements were necessary* or they expressed praise for the relaxing *atmosphere*, *friendly people*, and/or *overall beauty of the trail*.

When asked to offer suggestions of what they feel could be improve on the trail/ in the trail communities or make their experience better, the most frequently mentioned suggestion by far was for *better signage* both on and off the trail. *Smoother trail surface/more pavement, more water fountains and restrooms*, and *more restaurants/sandwich shops* in close vicinity to the trailheads were also mentioned with some frequency.

Segmentation Analysis

In order to identify how types of visitors differed in behaviors, trail users were divided into three separate segments for comparative analysis:

- **Overnighters:** Trail users that reported or planned an overnight stay in conjunction with their trip.
- **Day Trippers:** Trail users that did not live in the same zip code as one of the eight trailhead locations and did not report/plan an overnight stay in conjunction with their trip.
- **Locals:** Trail users that reported living in the same zip code as one of the eight trailhead locations and did not report/plan an overnight stay in conjunction with their trip.

The trailheads come into view as travel destinations as the vast majority of the trail users were qualified as either *overnighters* (40.8%) or *day trippers* (40.2%) and only about one in five (19.0%) were classified as *locals*.

Overnighters

- The vast majority (86.3%) of the overnighters reported that they and/or their group members had/planned to spend money in the trail communities while using the trail.
  - When estimated average spending within the trail communities ($33) was combined with estimated average spending per night on overnight accommodations ($65), overnighters estimated spending an average of $98 a day while using the trail.
  - The average number of overnight stays, reported in conjunction with their trips, was 2.4 and the median value was 2 nights. Thus, overnighters estimated spending an average of $196 per trip while using the trail.
- Nearly half (43.7%) of the overnighters mentioned that this was their first trip to the trail, followed by about one in five (17.9%) who only visit the

trail *once a year*. Very few mentioned visiting *several times a month* or *several times a week*.

 – Nearly all (96.9%) of the overnighters reported *biking* while using the trail and the vast majority (82.7%) mentioned doing so for *recreation*. Overnighters were significantly more likely than the other segments to report that they or at least one of their group members rented/planned to rent equipment while using the trail (8.9%).

- The average one-way distance traveled by overnighters to the trail was 289 miles and the median distance was 90 miles. Both of these levels were dramatically greater than those observed among the other segments.

- Excluding *Ohiopyle*, which was named by the vast majority as both a starting and ending point, overnighters were more likely to be *through trippers*. Specifically, *Boston, McKeesport,* and *Pittsburgh* were among the most frequently mentioned starting locations while *Washington, DC* and *Cumberland* were the most frequently mentioned ending locations.

- Similar to the other segments, nearly half (48.4%) of the overnighters reported originally hearing about the trail from *family or friends*. Overnighters however, were significantly more likely to have mentioned *internet search/web site* (29.3%) compared to the other two segments.

- Overnighters provided the highest average overall satisfaction rating (4.7) compared to the other segments, with three-quarters (75.2%) providing a top-box, *excellent*, score.

- Demographic profile of overnighters:
  - Gender: male (70.9%), female (29.1%)
  - Age: 16-34 (13.9%), 35-64 (77.8%), 65+ (8.3%)
  - Household Income: Less than $50K (19.4%), $51K–$100K (32.9%), +$100K (34.8%)

Day Trippers

- Over half (56.9%) of the day trippers mentioned that they and/or their group members had/planned to spend money in the trail communities while using the trail.
  - Their estimated average spending within the trail communities was $13 <u>a day</u>.

- The majority (60.3%) of the day trippers reported that they use the trail at least *several times a month* and one-quarter (25.2%) cited using the trail *several times a year*. Furthermore, only half as many respondents reported both *once a year* and *this is my first time* combined (14.5%) than did *several times a week* (37.2%).

- The vast majority (89.4%) reported *biking* while using the trail; however, *hiking/walking* (13.9%) was more popular among day trippers than overnighters (7.5%). Among day trippers, *health and exercise/fitness* (51.9%) was mentioned slightly more often than *recreation* (47.2%) as a primary reason for using the trail. Although popular among each segment type, the *spring* season was observed to be most popular among day trippers.
- Day trippers average travel distance one-way to the trail was 29 miles and the median distance was 16 miles. Despite being drastically lower than the levels observed among the overnighters, these distances were still significantly greater thane those reported by the locals.
- The vast majority of the day trippers reported ending at the same location at which they started while using the trail.
  - Accordingly, *Connellsville, Ohiopyle, Rockwood, and West Newton/Cedar Creek* were both the most frequently mentioned starting locations and ending locations.
- Similar to the other segments, approximately half (53.6%) of the day trippers mentioned originally hearing about the trail from *family or friends*, followed by one in five (20.0%) who stated that they *live by the trail.*
- The average overall satisfaction score provided by day trippers regarding their experience on the trail was 4.6, with over 90% giving a top-two box rating.
- Demographic profile of day trippers:
  - Gender: male (63.6%), female (36.4%)
  - Age: 16-34 (11.7%), 35-64 (68.7%), 65+ (19.6%)
  - Household Income: Less than $50K (31.1%), $51K–$100K (35.6%), +$100K (11.4%)

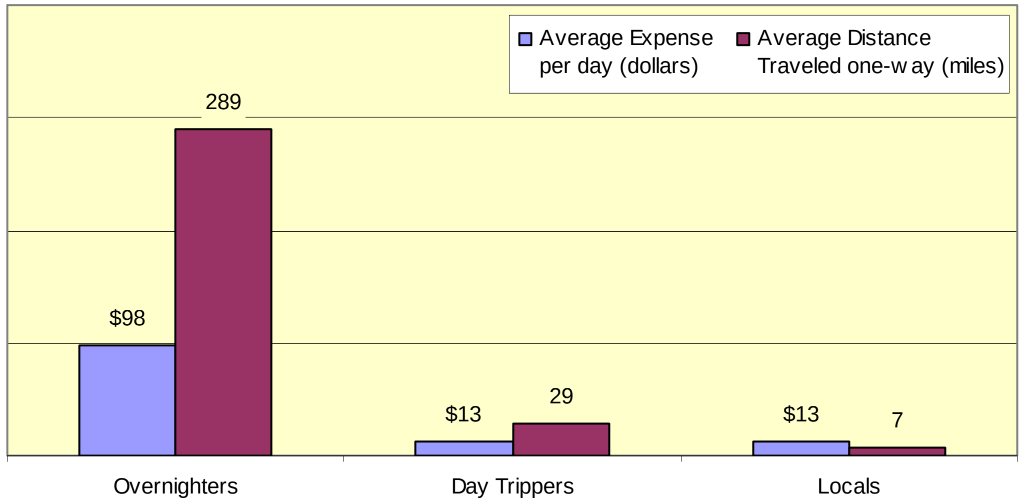
Locals

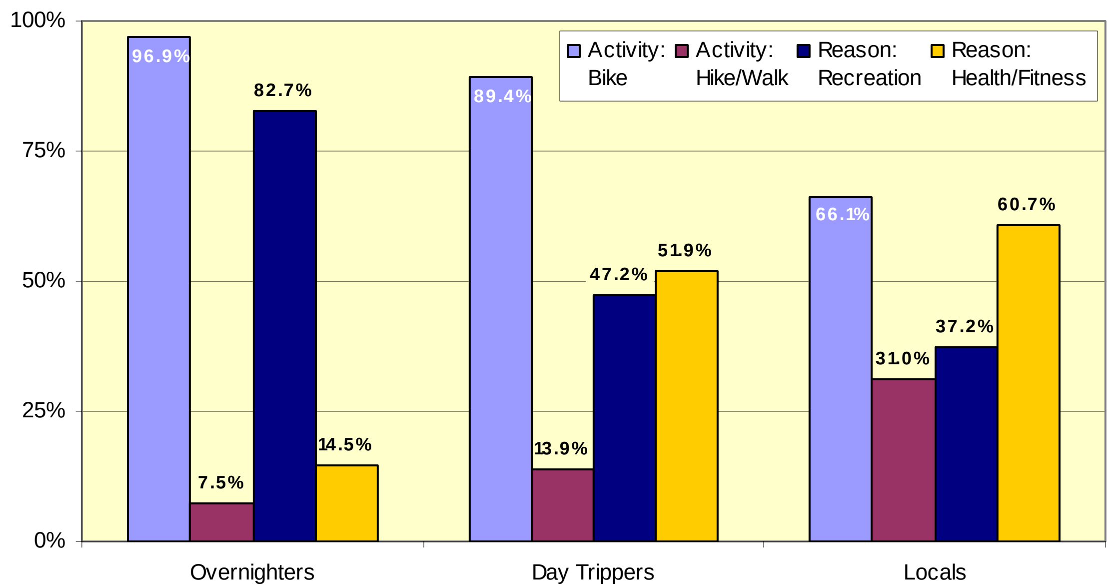
- Approximately half (49.2%) of the local trail users reported that they had/planned to spend money in their communities while using the trail.
  - They estimated that their average spending in the trail community, the day they used the trail, to be $13.

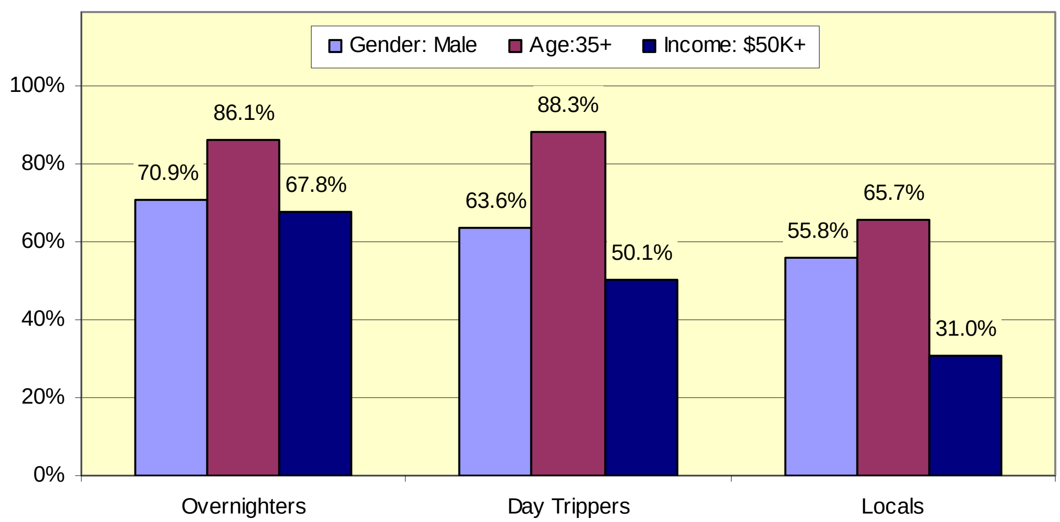
- Three-quarters (75.2%) of the locals mentioned using the trail at least *several times a month* while 17.4% that reported using the trail *several time a year*. Very few locals reported using the trail *once a year* or stated that *this is my first time*.
  - *Biking* (66.1%) was the most frequently mentioned activity performed on the trail; however, the percentage of locals that mentioned *hiking/walking* (31.0%) was significantly greater than the levels observed among the other segments. *Jogging* (9.1%) was also mentioned significantly more often by local trail users.
  - Completely opposite of overnighters, the majority (60.7%) of local trail users reported using the trail for *health and exercise/fitness* compared to 37.2% that mentioned using the trail for *recreation*.
- On average, locals traveled 7 miles one-way to get to the trail. However, the median distance only totaled 3 miles as the majority (60%) of the locals reported traveling less than five miles.
- For the most part, local trail users tended to start and end at the same location.
  - Interestingly, half (51%) of the local trail users reported starting on the trail at *Frostburg/Big Savage Tunnel*.
- Similar to the other segments, about half (46.7%) of the local trail users reported hearing about the trail from *family or friends*, followed by more than one-third (36.4%) that cited *live by the trail*. A significantly greater percentage of the local trail users mentioned hearing about the trail for a *bike/recreation shop or store* (14.5%) compared to the other segments.
- Even though ratings were still extremely positive, the majority (84.9%) gave a top-two box score; compared to the other segments local trail users provided the lowest average overall satisfaction ratings regarding their experience on the trail (4.4).
- Demographic profile of locals:
  - Gender: male (55.8%), female (44.2%)
  - Age: 16-34 (34.3%), 35-64 (51.7%), 65+ (14.0%)
  - Household Income: Less than $50K (63.2%), $51K–$100K (24.8%), +$100K (6.2%)

The following 3 graphs summarize some of the key differences between the segments.

Key Differences Observed Between Segments







Supplemental Survey Analysis

A total of 3,036 e-mail invitations were sent out to individuals that had inquired online about the trail within the previous year. Since it was unknown whether or not any of these individuals actually visited the trail, a small set of screener questions were included in the supplemental survey that were not included in the survey that was administered along the trail.

In total, 302 completed surveys were collected, with 228 reporting that they had visited the trail after their online inquiry and 74 reporting that they did not.

Similar to those interviewed along the trail, a large percentage visitors and non-visitors that inquired online originally heard about the trail through *family and friends*. However, significantly more online inquirers mentioned hearing about the trail from an *internet website or search* compared to intercepted trail users.

Reported Source of Trail Awareness

	Online Inquiry		Intercept
	Visitor	Non-Visitor	Trail Users
Bases:	***228***	***74***	***1272***
Internet website or search	57.9%	41.9%	15.3%
Family and Friends	36.1%	33.8%	50.2%
Magazine	13.2%	6.8%	4.0%
Newspaper	13.2%	9.5%	6.1%
Bike/Recreation shop or store	8.3%	4.1%	7.6%
Live by the trail	7.5%	0.0%	17.1%
Don't know/don't recall	8.3%	9.5%	6.4%

Online Inquiry: Visitors

Those who visited the trail were then asked to name any other Southwestern PA/Northern MD activities and/or attractions that they participated in addition to visiting the trail. *Attractions*, such as *Fallingwater* and *Ohiopyle* were identified most often, by approximately six in ten.

Next, visitors were asked if they had been approached by a volunteer while using the trail and asked to complete a survey. The vast majority of the visitors stated that they were not asked to complete a survey. Among the small number of respondents that had been approached, 13 admitted to completing the survey. Those respondents skipped directly to the end of the survey, where they provided basic demographic information (which was included in the results), and were thanked for their time. All visitors that had not been approached to complete a survey while visiting the trail or that had declined participation proceeded on and completed the online inquiry version of the trail user intercept study.

Trail Users' Usage Pattern and Group Composition

Most notably, inquirers were far less likely to have begun and ended at the same trailhead location, a trend observed among the majority of those interviewed along the trail. Furthermore, significantly fewer inquirers mentioned participating in long distance through trips compared to intercepted trail users. Interestingly however, inquirers were significantly more likely to have spent successive days on the trail as well as report an overnight stay in conjunction with their trip.

Inquirers previously used the trail much less often, with over half reporting that they were first-time visitors and compared to the trail users interviewed on the trail, inquirers/their group members planned significantly fewer trips to the trail this calendar year.

Despite all the differences between the samples, online inquiry visitors were similar to intercepted trail users in many ways as well. The majority of the inquirers also visited the trail with at least one other person and their most frequently mentioned form of transportation to get to the trail was either a *personal* or a *friend's car/van/truck*. Like the intercepted trail users, those inquirers that had previously visited the trail also admitted to typical use on the *weekends* and during the *fall* and *summer* months. In addition, the vast majority of their groups consisted of *friends/family*, *bike riding* was the most frequently mentioned activity, and their/their groups' primary reason for using the trail that day was for *recreation*.

Trail Users' Spending Habits

With very few exceptions, the reported spending habits of trail users that inquired online before visiting were significantly greater than those observed among visitors interviewed while on the trail. However, these differences were most likely due to the fact that online inquirers, in addition to reporting longer average travel distances, were more likely to spend successive days on the trail and mention overnight stays.

More than eight in ten visitors that had previously inquired online indicated that they/their group spent money in the communities along the trail the day of their visit. Inquirers estimated, excluding individual package costs, spending an average of $186 per person. However, differences were observed in estimated spending between the types of trail users. Those who reported an overnight stay in conjunction with their trip averaged spending $203 per person, while average spending among *local* trail users and/or those that mentioned participating in a *day trip* was only $64 per person. Visitors that indicated purchasing a package estimated an average spending of $147 per individual package.

Those who reported traveling with at least one other person and also reported spending money in the communities along the trail estimated spending an average of $271 per group and once again; differences in estimated spending were observed between the types of users. Those who reported an *overnight stay* averaged spending $300 per group, while average spending among those that mentioned participating in a *day trip* was only $56 per group. Visitors who mentioned purchasing group packages estimated an average cost of $594 per package.

- Similar to the intercepted trail users, visitors report that they/their group spent money on *beverages* or *restaurants* most often; but this was followed closely by a majority that also reported purchasing *candy/snacks*.
- Average per person/per group spending was highest for *transportation*, *daily equipment rentals*, and *restaurants*.

See chart on the following page.

Reported Spending of Visitors that Inquired Online

	Online Inquiry: Visitors Spending			
	Personal		Group	
	% Purchasing	Mean	% Purchasing	Mean
Bases:	***175***		***150***	
Total (excluding package & lodging costs)	81%	$116	19%	$197
Bases: Specific Items/Services	***175***	***20*-152***	***150***	***11*115***
-Beverages	*83%*	*$12*	*71%*	*$25*
-Clothing	*19%*	*$30*	*21%*	*$39*
-Candy/Snacks	*61%*	*$10*	*57%*	*$16*
-Daily Equipment Rental (bikes, etc.)	*11%*	*$67*	*7%*	*$76*
-Ice Cream	*38%*	*$7*	*38%*	*$11*
-Restaurants	*87%*	*$59*	*77%*	*$130*
-Souvenirs	*29%*	*$18*	*26%*	*$28*
-Transportation (shuttling, taxi, etc.)	*21%*	*$106*	*16%*	*$232*
-Other (sunscreen, film, etc.)	*23%*	*$30*	*23%*	*$33*
Individual/Group Package Costs	*13%*	*$147*	*15%*	*$594*

***Caution: small base sizes**

Online inquiry visitors who mentioned at least one overnight stay in conjunction with their trip estimated spending an average of $82 a night on accommodations. Similar to the trail users that were interviewed along the trail, differences were observed between types of accommodations in regards to nightly charges; those staying at bed & breakfasts averaged a fee of $98 per evening, nightly campground fees averaged $37, and respondents that stayed in a motel/hotel/hostel, on average, paid $108 per night.

Practically all of the online inquiry visitors rated their overall experience on the trail as either *very good* or *excellent* and similar to the intercepted trail users, they suggested *additional signage* both on and around the trail so that trail users can be better informed about the trail towns and also so trailheads are easier to find.

Online Inquiry: Non-Visitors

Respondents who stated that they had not visited the trail where asked to provide reasons why they decided not to visit after their online inquiry. The most frequently mentioned reason, cited nearly seven times more often than any other response, was that they simply *did not have time*. However, nearly all of the non-visitors stated that they were either *somewhat* or *extremely likely* to visit the trail in the future.

When asked if they still visited other destinations in the Southwestern PA/Northern MD region this season, over half of the non-visitors stated that they had. Similar to the visitors, the vast majority identified *attractions* such as *Fallingwater*, *C&O Canal Towpath*, and/or *Ohiopyle*. Those who reported that they had not visited the Southwestern PA/Northern MD regions this summer stated that they instead traveled to another state or to the mountains.

Online inquiry non-visitors, having chosen not to visit the trail, were asked to answer questions regarding any alternative activities/visits they may have participated in over the summer.

Similar to the trail visitors, the vast majority of the respondents reported having at least one other person in their group the day that they participated in an alternative activity/visited another location.

Three-quarters of the respondents mentioned that they/their group made purchases in the communities they visited. Excluding any individual package costs, non-visitors estimated that they spent an average of $211 per person. Those purchasing individual packages estimated spending an average of $199 per package. Respondents who were admittedly part of a group estimated average expenditures, excluding group package costs, of $257 per group. Individuals/ group members who purchased a group package estimated spending an average of $623 per group package.

- Similar to trail visitors, non-visitors mentioned that they/their group made purchases on *beverages*, *candy/snacks*, or *restaurants* most often
- Average per person/per group spending was highest for *daily equipment rentals* and *restaurants*.

See chart on the following page.

Reported Spending of Non-Visitors that Inquired Online

	Online Inquiry: Non-Visitors Spending			
	Personal		Group	
	% Purchasing	Mean	% Purchasing	Mean
Bases:	***56***		***50***	
Total (excluding package & lodging costs)	76%	$142	24%	$179
Bases: Specific Items/Services	***56***	***5*-47***	***50***	***4*-34***
-Beverages	*84%*	*$19*	*68%*	*$58*
-Clothing	*29%*	*$45*	*20%*	*$86*
-Candy/Snacks	*55%*	*$10*	*56%*	*$19*
-Daily Equipment Rental (bikes, etc.)	*23%*	*$113*	*14%*	*$109*
-Ice Cream	*36%*	*$10*	*30%*	*$18*
-Restaurants	*80%*	*$66*	*56%*	*$113*
-Souvenirs	*34%*	*$36*	*30%*	*$41*
-Transportation (shuttling, taxi, etc.)	*9%*	*$36*	*8%*	*$104*
-Other (sunscreen, film, etc.)	*38%*	*$22*	*28%*	*$39*
Individual/Group Package Costs	*29%*	*$199*	*30%*	*$623*

***Caution: small base sizes**

A large proportion of non-visitors indicated that they did have an overnight stay in conjunction with their trip and most frequently reported staying in a *hotel/motel/hostel*, followed by one-third that mentioned spending the night at a *campground*, approximately one in eight the mentioned spending the night in a *cabin/lodge/condo* and less than one in ten reported staying at a *bed and breakfast*. Non-visitors estimated that they spent on average of $100 per night on accommodations. However, as was observed among both of the trail users samples, average costs associated with each of the accommodations differed. Those staying in a motel/hotel/hostel paid an average of $103 each evening, campground fees, per night, averaged $32, and fees reported for a nightly stay at a cabin/lodge/condo were upwards of $244 per night.

Nearly nine in ten online inquiry non-visitors reported that their experience participating in an alternative activity to the trail was *very good* or *excellent*.

Research Findings

Note:

Question 1 was asked of all respondents.

Question 1. **Where did you start on the trail?**

Starting Location

	Total	Location of Interview							
		Con-fluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohio-pyle	Rock-wood	West Newton
Bases:	*1272*	*18**	*127*	*22**	*290*	*70*	*307*	*207*	*231*
Frostburg/ Big Savage Tunnel	13.1%	11.1%	0.0%	4.5%	51.4%	8.6%	0.3%	3.4%	0.0%
Ohiopyle	12.8%	11.1%	2.4%	0.0%	3.1%	1.4%	45.9%	2.9%	0.4%
Connellsville	10.1%	0.0%	55.9%	0.0%	0.0%	0.0%	18.2%	0.0%	0.9%
Rockwood	9.1%	0.0%	0.0%	4.5%	2.4%	8.6%	1.3%	47.3%	0.0%
West Newton/ Cedar Creek	8.9%	0.0%	4.7%	0.0%	1.7%	1.4%	2.0%	2.4%	39.0%
Boston	8.3%	0.0%	5.5%	4.5%	0.0%	1.4%	5.2%	5.3%	29.9%
Cumberland	6.6%	11.1%	2.4%	36.4%	15.5%	7.1%	1.6%	3.9%	3.5%
Confluence	5.7%	38.9%	0.8%	0.0%	3.1%	2.9%	11.4%	9.2%	0.0%
McKeesport	4.6%	5.6%	5.5%	4.5%	0.0%	7.1%	5.9%	3.4%	8.2%
Meyersdale	4.5%	0.0%	0.8%	9.1%	8.6%	24.3%	1.0%	4.3%	0.0%
Pittsburgh	3.7%	5.6%	3.1%	4.5%	6.2%	8.6%	2.0%	5.3%	0.0%
Washington DC	3.6%	0.0%	2.4%	9.1%	4.5%	12.9%	3.3%	4.3%	0.0%

***Caution: small base sizes**

Findings

The most frequently cited starting locations, by at least one in ten trail users, were *Frostburg/Big Savage Tunnel*, *Ohiopyle*, and *Connellsville* (13.1%, 12.8%, and 10.1%; respectively).

- This was followed closely by *Rockwood*, *West Newton/Cedar Creek*, and *Boston* (9.1%, 8.9%, and 8.3%, respectively).
- The largest proportions of respondents were interviewed coming off the trail in the same trail town that they reported as their starting location.

Q1. continued →

- Among towns that were <u>not</u> utilized for interviewing, two notable trends were observed:
  - Those that reported starting on the trail in *Boston* were significantly more likely to have been interviewed in West Newton/Cedar Creek.
  - Those that reported starting on the trail in *Washington DC* were significantly more likely to have been interviewed in Meyersdale.

Subgroup Differences

- Respondents that reported starting on the trail in *Cumberland* were significantly more likely to report typically using the trail in either *summer* and/or *fall*.
- Respondents that started on the trail in *Boston*, *McKeesport*, *Pittsburgh*, or *Washington DC* were significantly more likely to report an overnight stay in conjunction with their trip.
- Conversely, respondents that reported starting on the trail in *Frostburg/Big Savage Tunnel*, *Connellsville*, *Rockwood*, or *West Newton/ Cedar Creek* were significantly <u>less</u> likely to plan an overnight stay in conjunction with their trip.

Note:
Question 2 was asked of all respondents.

Question 2. **Will you be/have you been on the trail for successive days?**

Successive Days on Trail

		Location of Interview							
	Total	Con-fluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohio-pyle	Rock-wood	West Newton
Bases:	***1272***	***18****	***127***	***22****	***290***	***70***	***307***	***207***	***231***
Yes	34.1%	38.9%	31.5%	40.9%	24.1%	58.6%	34.9%	42.0%	31.6%
No	65.9%	61.1%	68.5%	59.1%	75.9%	41.4%	65.1%	58.0%	68.4%

***Caution: small base sizes**

Findings

Slightly more than one-third (34.1%) of the respondents reported that they either *have been* on the trail for successive days or *planned to be*.

- Respondents that were interviewed in Meyersdale were significantly more likely than those interviewed in any of the other towns to report successive days on the trail.

Subgroup Differences

- No significant differences were observed by subgroup.

Note:

Question 2a was asked of all respondents that reported being on the trail for successive days.

Question 2a. **How many days have you been/do you plan to remain on the trail?**

Days on the Trail

		Location of Interview							
	Total	Con-fluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohio-pyle	Rock-wood	West Newton
Bases:	***434***	***7****	***40****	***9****	***70***	***41****	***107***	***87***	***73***
Two	30.6%	14.3%	35.0%	22.2%	17.1%	41.5%	32.7%	29.9%	35.6%
Three	24.2%	42.9%	22.5%	0.0%	30.0%	17.1%	21.5%	19.5%	34.2%
Four	10.4%	0.0%	7.5%	33.3%	10.0%	4.9%	9.3%	11.5%	13.7%
Five	11.3%	0.0%	5.0%	11.1%	17.1%	7.3%	9.3%	18.4%	6.8%
More than five	23.5%	42.9%	20.0%	33.3%	12.9%	4.9%	3.7%	6.9%	1.4%
Mean	***4.4***	***4.6***	***4.7***	***4.7***	***4.8***	***3.9***	***4.2***	***4.3***	***4.2***

***Caution: small base sizes**

Findings

Over half of the respondents that reported they had been/planned to be on the trail for successive days mentioned being on the trail for either *two* (30.6%) or *three* (24.2%) days.

- Nearly one-quarter (23.5%) cited being on the trail *more than five* days.
- Respondents interviewed in Connellsville, Meyerdale, Ohiopyle, Rockwood, or West Newton/Cedar Creek were more likely have reported *two* days compared to the other trail towns.
- Those interviewed in Confluence, Connellsville, Frostburg/Big Savage Tunnel, Meyersdale, Ohiopyle, or Rockwood were more likely to have cited *more than five* days compared to the other trail towns.
- Respondents interviewed in either Rockwood or Frostburg/Big Savage Tunnel were more likely to have mentioned *five* days compared to the other trail towns.

Subgroup Differences

- No significant differences were observed by subgroup.

Note:

Question 3 was asked of all respondents.

Question 3. **What form of transportation did you use to get to the trail today?**

Transportation Used to the Trail

		Location of Interview							
	Total	Con-fluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohio-pyle	Rock-wood	West Newton
Bases:	***1272***	***18****	***127***	***22****	***290***	***70***	***307***	***207***	***231***
Car/truck/van (personal)	64.5%	72.2%	76.4%	50.0%	40.0%	47.1%	69.4%	72.9%	81.0%
Bike	20.6%	11.1%	17.3%	36.4%	24.8%	40.0%	21.5%	18.8%	10.8%
Car/truck/van (friend)	5.8%	5.6%	3.1%	4.5%	13.4%	1.4%	5.9%	1.0%	3.5%
Walked	3.8%	5.6%	1.6%	4.5%	11.4%	5.7%	0.7%	1.0%	1.3%
Private shuttle service	2.8%	0.0%	0.0%	0.0%	8.6%	2.9%	0.7%	1.4%	1.3%

***Caution: small base sizes**

Findings

The majority of the respondents reported traveling to the trail in either their own *personal car/truck/van* (64.5%) or their *friend's car/truck/van* (5.8%).

- One in five (20.6%) stated that they rode a *bike* to the trail.
- Respondents were significantly more likely to mention traveling to the trail in a *personal car/truck/van* if they were interviewed in Confluence, Connellsville, Ohiopyle, Rockwood, or West Newton/Cedar Creek compared to the other trail towns.
- Respondents were significantly more likely to report traveling to the trail by *bike* if they were interviewed in either Cumberland or Meyersdale compared to the other trail towns.
- Those interviewed at Frostburg/Big Savage Tunnel were significantly more likely to report three of the methods of transportation, *friend's car/truck/van*, *walk*, and *private shuttle service*, compared to those in other trail towns.

Q3. continued →

Subgroup Differences

- Respondents were significantly more likely to report an overnight stay if they drove to the trail in a *personal car/truck/van* or if they *walked*.
- Respondents were significantly <u>less</u> likely to report an overnight stay if they rode their *bike* to the trail or utilized a *private shuttle service*.

Note:

Question 4 was asked of all respondents.

Question 4. Where are you ending on the trail?

Ending Location

	Total	Location of Interview							
		Con-fluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohio-pyle	Rock-wood	West Newton
Bases:	***1272***	***18****	***127***	***22****	***290***	***70***	***307***	***207***	***231***
Ohiopyle	14.9%	5.6%	18.1%	0.0%	2.4%	2.9%	47.9%	4.3%	0.4%
Cumberland	12.7%	5.6%	3.9%	54.5%	26.6%	8.6%	4.2%	5.8%	15.6%
Frostburg/ Big Savage Tunnel	12.4%	0.0%	0.0%	4.5%	50.0%	8.6%	0.7%	1.9%	0.0%
Washington DC	8.1%	16.7%	7.1%	13.6%	7.6%	12.9%	9.4%	13.5%	0.0%
Rockwood	7.9%	0.0%	0.0%	0.0%	0.3%	5.7%	0.7%	45.4%	0.0%
Connellsville	7.6%	0.0%	35.4%	0.0%	0.0%	0.0%	16.0%	0.5%	0.9%
West Newton/ Cedar Creek	7.2%	5.6%	0.8%	0.0%	0.0%	0.0%	1.0%	0.0%	37.2%
Confluence	5.8%	50.0%	7.1%	0.0%	0.0%	2.9%	11.1%	8.7%	0.9%
Boston	5.4%	0.0%	2.4%	0.0%	0.7%	4.3%	1.6%	2.4%	22.1%
Meyersdale	3.5%	0.0%	0.0%	0.0%	3.4%	25.7%	2.0%	5.3%	0.0%
McKeesport	2.4%	0.0%	3.9%	0.0%	0.0%	7.1%	2.0%	2.4%	3.9%
Pittsburgh	2.2%	5.6%	1.6%	9.1%	3.4%	7.1%	1.0%	2.4%	0.0%

***Caution: small base sizes**

Findings

The most frequently cited ending locations, by at least one in eight trail users, were *Ohiopyle*, *Cumberland*, and *Frostburg/Big Savage Tunnel* (14.9%, 12.7%, and 12.4%, respectively).

- The group of locations that were mentioned second most often included *Washington DC*, *Rockwood*, *Connellsville*, and *West Newton/Cedar Creek* (8.1%, 7.9%, 7.6%, and 7.2%, respectively).

Q4. continued →

- Similar to the trend observed with the starting locations (Q1), the largest proportions of the respondents were interviewed while exiting the trail at their final destination.
  - Those interviewed at Connellsville were significantly more likely than those interviewed in other trail towns, excluding Ohiopyle, to cite *Ohiopyle* as their final destination.
  - Respondents interviewed at Frostburg/Big Savage Tunnel were significantly more likely than those interviewed in other trail towns, excluding Cumberland, to mention that their final destination was *Cumberland*.
- Among towns that were <u>not</u> utilized for interviewing, the only trend observed was that respondents interviewed in West Newton/Cedar Creek were significantly more likely than those in other towns to report *Boston* as their final destination.

Subgroup Differences

- Respondents that cited *Cumberland*, *Washington DC*, *McKeesport*, or *Pittsburgh* as their ending location were significantly <u>more</u> likely to report an overnight stay.
- Those that mentioned *Frostburg/Big Savage Tunnel*, *Rockwood*, *Connellsville*, or *West Newton/Cedar Creek* as their ending location were significantly <u>less</u> likely to report an overnight stay.

Note:
Question 5 was asked of all respondents.

Question 5. **How far did you travel, ONE-WAY, to come to the trail?**

Distance Traveled to the Trail

		Location of Interview							
	Total	Con-fluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohio-pyle	Rock-wood	West Newton
Bases:	***1272***	***18****	***127***	***22****	***290***	***70***	***307***	***207***	***231***
Less than 5 miles	20.4%	5.6%	22.0%	22.7%	41.0%	18.6%	6.2%	10.6%	22.9%
5-25 miles	35.7%	16.7%	31.5%	18.2%	47.6%	10.0%	24.4%	31.4%	52.8%
26-50 miles	13.2%	22.2%	22.0%	9.1%	6.2%	7.1%	19.2%	17.9%	6.5%
50 miles or more	29.6%	55.6%	23.6%	50.0%	4.8%	48.6%	50.2%	39.6%	17.7%
Median	20.0	65.0	25.0	50.0	5.0	75.0	54.0	35.0	12.0
Mean	131.0	115.3	140.7	87.0	38.1	151.4	178.8	171.9	142.2

***Caution: small base sizes**

Findings

More than half of the respondents reported a one-way traveling distance of either *less than 5 miles* (20.4%) or *5-25 miles* (35.7%).

- Most (29.6%) of the remaining respondents mentioned the complete opposite, a one-way traveling distance of *50 miles or more*.
- Those interviewed at either Frostburg/Big Savage Tunnel or West Newton/Cedar Creek were significantly more likely to mention *less than 25 miles* compared to those in other towns.
- Respondents interviewed in Connellsville, Ohiopyle, or Rockwood were significantly more likely to have cited *26-50 miles* compared to those in other towns.
- Finally, those interviewed in Confluence, Cumberland, Meyersdale, Ohiopyle, or Rockwood were significantly more likely than those in other towns to report *more than 50 miles.*

Subgroup Differences

- Not surprisingly, respondents that cited a one-way traveling distance of *more than 50 miles* were significantly more likely to have reported an overnight stay, while those citing distances of *less than 50 miles* were significantly less likely to mention an overnight stay.

Q5. continued →

- Those that reported a distance of *less than 5 miles* were significantly more likely to report typically using the trail in *winter*.

Note:

Question 6 was asked of all respondents.

Question 6. How often, on average, do you use the trail?

Frequency of Use

	Total	Location of Interview							
		Con-fluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohio-pyle	Rock-wood	West Newton
Bases:	***1272***	***18****	***127***	***22****	***290***	***70***	***307***	***207***	***231***
Once a week or more	25.9%	5.6%	29.9%	31.8%	25.2%	21.4%	13.7%	27.5%	42.0%
Several times a month	18.7%	11.1%	25.2%	18.2%	26.9%	12.9%	11.1%	14.0%	21.6%
Several times a year	23.0%	16.7%	22.0%	13.6%	21.7%	15.7%	32.6%	20.8%	17.7%
Once a year	10.1%	22.2%	10.2%	9.1%	4.8%	14.3%	17.9%	11.6%	3.0%
This is my first time	22.2%	44.4%	12.6%	27.3%	21.4%	35.7%	24.8%	26.1%	15.6%

***Caution: small base sizes**

Findings

The frequency at which respondents reported using the trail was well distributed; a difference of only 15% was observed between the most frequently selected response and the least.

- The majority of the respondents reported visiting the trail at least *several times a year* (23.0%), with nearly one in five (18.7%) selecting *several times a month* and one-quarter (25.9%) reporting *once a week or more*.
- Slightly more than one in five (22.2%) stated that *this is my first time*; followed by one in ten (10.1%) that only visit the trail *once a year*.
- Those interviewed in West Newton/Cedar Creek were significantly more likely than those in other towns to visit *once a week or more*.
- Respondents were significantly more likely to mention *several times a month* if they were interviewed in Connellsville, Frostburg/Big Savage Tunnel, or West Newton/Cedar Creek compared to other towns.
- Those interviewed in Ohiopyle were significantly more likely to cite *several times a year* than were those in the other towns.

Q6. continued →

- Finally, respondents were significantly more likely to report *this is my first time* if they were interviewed in Connellsville, or Meyersdale compared to other towns.

Subgroup Differences

- Respondents that reported visiting the trail *once a week or more* were significantly more likely to:
  - typically use the trail in *summer* or *winter*, especially *winter*
  - have <u>not</u> reported an overnight stay
- Those that mentioned *several times a year* were also significantly <u>less</u> likely to report an overnight stay.
- Respondents were significantly <u>less</u> likely to typically use the trail in *winter* if they reported using the trail *several times a year*.
- Respondents that mentioned visiting the trail *once a year* were significantly more likely to:
  - typically use the trail is the *summer*
  - have reported an overnight stay
- Those who stated that *this is my first time* were significantly more likely to have mentioned an overnight stay.

Note:

Question 6a was asked of all respondents that reported visiting the trail at least one time prior to the day of the interview.

Question 6a. **What days of the week do you typically visit the trail?**

Typical Days of Trail Visits

		Location of Interview							
	Total	Con-fluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohio-pyle	Rock-wood	West Newton
Bases:	*989*	*10**	*111*	*16**	*228*	*45**	*231*	*153*	*195*
Monday-Thursday	55.7%	30.0%	56.8%	50.0%	52.6%	71.1%	46.3%	56.9%	67.2%
Friday	48.1%	40.0%	35.1%	37.5%	68.4%	57.8%	34.2%	43.8%	50.8%
Saturday	70.1%	80.0%	80.2%	75.0%	72.4%	64.4%	63.6%	68.6%	70.8%
Sunday	63.9%	80.0%	62.2%	68.8%	69.7%	57.8%	58.4%	68.6%	61.0%

****Caution: small base sizes***

Findings

When asked to name the days of the week that they typically visit the trail, respondents cited the weekend, *Saturday* (70.1%) and *Sunday* (63.9%), most often.

- However, *Monday-Thursday* and *Friday*, were also mentioned by a large proportion of the respondents (48.1% and 55.7%, respectively)
- Those interviewed in either Meyersdale or West Newton/Cedar Creek were significantly more likely to report typically visiting the trail *Monday-Thursday* compared to those interviewed in the other towns.
- Respondents that named *Friday* were:
  - significantly more likely to have been interviewed at Frostburg/Big Savage Tunnel than in the other towns
  - somewhat more likely to have been interviewed in either Meyersdale or West Newton/Cedar Creek compared to the other towns

Subgroup Differences

- Those that cited *Monday-Thursday* were significantly more likely to:
  - typically use the trail in the *winter*
  - have not reported an overnight stay
- It was significantly more likely for respondents that mentioned either *Saturday* and/or *Sunday* to have reported an overnight stay.

Note:

Question 6b was asked of all respondents that reported visiting the trail at least one time prior to the day of the interview.

Question 6b. What time(s) of year do you typically visit the trail?

Typical Season of Trail Visits

	Total	Location of Interview							
		Con-fluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohio-pyle	Rock-wood	West Newton
Bases:	***989***	***10****	***111***	***16****	***228***	***45****	***231***	***153***	***195***
Spring	61.4%	50.0%	73.0%	56.2%	40.4%	62.2%	52.8%	72.5%	81.5%
Summer	87.6%	100.0%	91.9%	68.8%	82.5%	93.3%	84.8%	89.5%	92.3%
Fall	75.1%	80.0%	82.9%	56.2%	74.1%	71.1%	64.5%	80.4%	82.6%
Winter	10.3%	10.0%	13.5%	0.0%	5.7%	13.3%	9.5%	11.1%	14.4%
Don't know/ No pattern	3.5%	0.0%	3.6%	12.5%	8.8%	2.2%	2.2%	0.7%	1.0%

***Caution: small base sizes**

Findings

The vast majority (87.6%) of the respondents stated that they typically use the trail during the *summer*.

- This was followed closely by 75.1% that cited *fall* and 61.4% who named *spring*.
- Only one in ten (10.3%) reported that they typically use the trail in the *winter* and very few (3.5%) *didn't know/didn't have a pattern*.
- Respondents interviewed in West Newton/Cedar Creek were significantly more likely to have name *spring* compared to those interviewed in the other towns.
  - Those interviewed at Frostburg/Big Savage Tunnel were significantly <u>less</u> likely to have mentioned *spring* than the other towns.
- Despite being mentioned very frequently by all respondents, *summer* was cited slightly more often by those interviewed in Confluence, Connellsville, Meyersdale, Rockwood, or West Newton/Cedar Creek compared to those interviewed in the other towns.

Q6b. continued →

- Those interviewed in either Connellsville or West Newton/Cedar Creek were significantly more likely to have selected *fall* than those interviewed in Cumberland, Frostburg/Big Savage Tunnel, or Ohiopyle.

Subgroup Differences

- No significant differences were observed by subgroup.

Note:

Question 7 was recorded by interviewer's observation for all respondents.

Question 7. What is the gender of respondent?

Gender of Respondent

	Total	Location of Interview							
		Con-fluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohio-pyle	Rock-wood	West Newton
Bases:	*1272*	*18**	*127*	*22**	*290*	*70*	*307*	*207*	*231*
Male	65.1%	61.1%	67.7%	63.6%	58.6%	67.1%	66.8%	72.0%	63.2%
Female	34.9%	38.9%	32.3%	36.4%	41.4%	32.9%	33.2%	28.0%	36.8%

Caution: small base sizes

Findings

The majority of the respondents interviewed were *male* (65.1%).

Subgroup Differences

- *Male* respondents were significantly more likely to have reported an overnight stay.

Note:

Question 8 was asked of all respondents.

Question 8. Which of the following best identifies your age group?

Age of Respondent

		Location of Interview							
	Total	Con-fluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohio-pyle	Rock-wood	West Newton
Bases:	*1272*	*18**	*127*	*22**	*290*	*70*	*307*	*207*	*231*
16-24	6.0%	11.1%	3.1%	13.6%	13.4%	5.7%	4.2%	2.4%	2.6%
25-34	10.9%	0.0%	9.4%	13.6%	20.0%	4.3%	6.2%	8.2%	11.7%
35-44	16.1%	33.3%	19.7%	36.4%	21.7%	14.3%	14.0%	11.6%	11.3%
45-54	28.0%	22.2%	24.4%	22.7%	25.2%	27.1%	31.6%	31.9%	26.4%
55-64	25.1%	27.8%	25.2%	4.5%	10.0%	35.7%	31.6%	30.0%	29.4%
65+	13.9%	5.6%	18.1%	9.1%	9.7%	12.9%	12.4%	15.9%	18.6%

***Caution: small base sizes**

Findings

The majority of the respondents that were interviewed reported being 35 years of age or older (16.1%–*35-44*, 28.0%–*45-54*, 25.1%–*55-64*, 13.9%–*65+*).

- One in ten (10.9%) were *25-34* years of age.
- Only 6% were *16-24* years of age.
- It was significantly more likely for respondents *16-34* years of age to have been interviewed at Frostburg/Big Savage Tunnel than any of the other towns.
- Respondents *35-44* years of age were more likely to have been interviewed in Confluence, Connellsville, Cumberland, or Frostburg/Big Savage Tunnel than the other towns.
- Those *55-64* years of age were significantly less likely to have been interviewed in either Cumberland or Frostburg/Big Savage Tunnel than any of the other towns.

Subgroup Differences

- Respondents *25-34* or *65+* years of age were each significantly less likely to have reported an overnight stay.

Q8. continued →

- Those *45-54* years of age were significantly more likely to have reported an overnight stay.
- Respondents *35-44* years of age were significantly less likely to report typically using the trail in the *winter*.

Note:

Question 9 was asked of all respondents.

Question 9. **What is your zip/postal code?**

Zip/Postal Code

		Location of Interview							
	Total	Con-fluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohio-pyle	Rock-wood	West Newton
Bases:	*1272*	*18**	*127*	*22**	*290*	*70*	*307*	*207*	*231*
(Net) Pennsylvania	57.5%	44.4%	83.5%	13.6%	15.9%	47.1%	65.5%	67.6%	84.0%
-Southwestern, PA	*51.7%*	*27.8%*	*76.4%*	*4.5%*	*14.1%*	*40.0%*	*56.4%*	*61.4%*	*80.1%*
-Southeastern, PA/ Keystone Corridor	*3.1%*	*11.1%*	*0.8%*	*4.5%*	*1.4%*	*0.0%*	*5.9%*	*3.9%*	*2.2%*
(Net) Other	40.2%	33.3%	15.0%	86.4%	81.0%	45.7%	34.5%	30.9%	13.0%
-Cumberland, MD	*18.1%*	*0.0%*	*0.0%*	*45.5%*	*70.3%*	*5.7%*	*20.0%*	*2.9%*	*0.0%*
-Washington DC/ Baltimore, MD	*6.6%*	*16.7%*	*5.5%*	*18.2%*	*4.8%*	*14.3%*	*9.8%*	*6.3%*	*1.3%*
-Cleveland, OH	*2.4%*	*0.0%*	*3.1%*	*0.0%*	*0.3%*	*2.9%*	*3.6%*	*3.9%*	*1.7%*

***Caution: small base sizes**

Findings

Over half (57.5%) of the respondents that were interviewed reported living in *Pennsylvania*, driven nearly entirely by visitors living in *southwestern, PA* (51.7%).

- Trail users living outside of PA where most likely to have reported living around *Cumberland, MD* (18.1%).
- Those living in *southwestern, PA* were significantly more likely to have been interviewed in West Newton/Cedar Creek, Connellsville, Rockwood, or Ohiopyle compared to other towns.
- Respondents living in *Cumberland, PA* were significantly more likely to have been interviewed in Frostburg/Big Savage Tunnel or Cumberland than another town.

Subgroup Differences

- Trail users living in *southwestern, PA* were significantly more likely to:
  - have reported typical use in *spring* and *winter*
  - have not reported an overnight stay

Q9. continued →

Research Findings

- Trail users living in *Cumberland, MD* were significantly more likely to:
  - have reported typical use in *summer* and *fall*
  - have <u>not</u> reported an overnight stay

Note:

Question 10 was asked of all respondents.

Question 10. How many persons were in your group today?

Group Size

	Total	Location of Interview							
		Con-fluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohio-pyle	Rock-wood	West Newton
Bases:	***1272***	***18****	***127***	***22****	***290***	***70***	***307***	***207***	***231***
Just myself	31.5%	22.2%	30.7%	9.1%	42.4%	24.3%	17.9%	28.5%	44.2%
2	42.4%	50.0%	48.8%	59.1%	35.2%	40.0%	46.3%	48.3%	36.4%
3-10	23.4%	22.2%	17.3%	31.8%	21.4%	31.4%	32.2%	19.3%	18.2%
More than 10	2.5%	5.6%	3.1%	0.0%	1.4%	4.3%	2.9%	3.9%	1.3%
No answer	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%

***Caution: small base sizes**

Findings

On the day they were interviewed, the majority of the respondents reported using the trail with at least one other person and the most frequently reported group size was *two* (42.4%).

- Slightly more than one in three (31.5%) stated that it was *just myself* using the trail.
- About one-quarter (23.4%) were with groups of *3-10* other people.
- Very few (2.5%) were using the trail with a group size of *more than 10*.
- Respondents were significantly more likely to have reported *just myself* if they were interviewed at either Frostburg/Big Savage Tunnel or West Newton/Cedar Creek compared to other towns.
- Those who reported groups ranging from *3-10* were significantly more likely to have been interviewed in Cumberland, Meyersdale, or Ohiopyle than the other towns.

Subgroup Differences

- Respondents stating *just myself* using the trail were significantly less likely to have reported an overnight stay.
- Those reporting group sizes of *3 or more* were significantly more likely to have reported an overnight stay.

Note:

Question 11 was asked of all respondents who reported traveling with at least one other person.

Question 11. What type of group are you traveling with?

Group Composition

	Total	Location of Interview							
		Con-fluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohio-pyle	Rock-wood	West Newton
Bases:	*871*	*14**	*88*	*20**	*167*	*53*	*252*	*148*	*129*
Personal group of friends/family	89.8%	92.9%	93.2%	90.0%	81.4%	83.0%	90.1%	95.3%	93.8%
Package trip (private)	3.6%	0.0%	0.0%	0.0%	14.4%	5.7%	0.4%	0.7%	1.6%
Package trip (commercial)	1.6%	0.0%	1.1%	10.0%	3.6%	0.0%	1.6%	0.0%	0.8%
Fundraising trip	1.3%	0.0%	2.3%	0.0%	0.0%	1.9%	1.2%	0.7%	3.1%

Caution: small base sizes

Findings

Among the respondents using the trail with at least one other person, the vast majority (89.8%) reported being part of a *personal group of friends/family*.

- It was significantly more likely for respondents who were part of a *private package trip* to have been interviewed at Frostburg/Big Savage Tunnel compared to any of the other towns.

Subgroup Differences

- Respondents using the trail with a *personal group of friends/family* were significantly less likely to report an overnight stay.

Note:

Question 12a was asked of all respondents who reported traveling with at least one other person.

Question 12a. **How many persons in your group are in the following age categories?**

Age of Group Members

		Location of Interview							
	Total	Con-fluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohio-pyle	Rock-wood	West Newton
Bases:	***871***	***14****	***88***	***20****	***167***	***53***	***252***	***148***	***129***
Under 10 years of age									
None	92.1%	92.9%	92.0%	90.0%	93.4%	81.1%	91.3%	94.6%	93.8%
One or more	7.9%	7.1%	8.0%	10.0%	6.6%	18.9%	8.7%	5.4%	6.2%
10-15 years of age									
None	90.9%	85.7%	93.2%	80.0%	96.4%	84.9%	87.3%	89.9%	95.3%
One or more	9.1%	14.3%	6.8%	20.0%	3.6%	15.1%	12.7%	10.1%	4.7%
16-24 years of age									
None	87.1%	78.6%	90.9%	70.0%	83.8%	84.9%	86.5%	87.8%	93.8%
One or more	12.9%	21.4%	9.1%	30.0%	16.2%	15.1%	13.5%	12.2%	6.2%
25-34 years of age									
None	83.1%	85.7%	76.1%	40.0%	76.6%	84.9%	84.5%	88.5%	93.0%
One or more	16.9%	14.3%	23.9%	60.0%	23.4%	15.1%	15.5%	11.5%	7.0%
35-44 years of age									
None	76.7%	50.0%	80.7%	100.0%	64.1%	81.1%	75.0%	79.7%	87.6%
One or more	23.3%	50.0%	19.3%	0.0%	35.9%	18.9%	25.0%	20.3%	12.4%
45-54 years of age									
None	58.0%	64.3%	62.5%	60.0%	60.5%	60.4%	54.8%	52.7%	62.0%
One or more	42.0%	35.7%	37.5%	40.0%	39.5%	39.6%	45.2%	47.3%	38.0%
55-64 years of age									
None	66.2%	71.4%	64.8%	95.0%	83.2%	52.8%	58.7%	62.2%	65.1%
One or more	33.8%	28.6%	35.2%	5.0%	16.8%	47.2%	41.3%	37.8%	34.9%
65+ years of age									
None	84.0%	100.0%	80.7%	85.0%	89.8%	75.5%	84.5%	84.5%	79.1%
One or more	16.0%	0.0%	19.3%	15.0%	10.2%	24.5%	15.5%	15.5%	20.9%

***Caution: small base sizes**

Q12a. continued →

Findings

Respondents where asked to report the ages of their fellow group members by providing a count for the number of individuals that fall into each of the age categories.

- The age category mentioned most often, by respondents for at least one of their group members, was *45-54 years of age* (42.0%).
- One-third (33.8%) of the respondents mentioned that a group member was *55-64 years of age*.
- About one-quarter (23.3%) stated that at least one of their group members were *35-44 years of age*.
- Respondents from groups with at least one member *under the age of 10* were significantly more likely to have been interviewed in Meyersdale compared to the other towns.
- Those using the trail with groups containing at least one member *10-15 years of age* were more likely to have been interviewed in Confluence, Cumberland, Meyersdale, Ohiopyle, or Rockwood than the other towns.
- It is somewhat <u>less</u> likely that a respondent who was accompanied by at least one person *16-24 years of age* would have been interviewed in West Newton/Cedar Creek compared to all of the other towns.
- Respondents using the trail with a group that had at least one member *25-34 years of age* were significantly more likely to have been interviewed in Connellsville, Cumberland, or Frostburg/Big Savage Tunnel than the other towns.
- Those accompanied by at least one person *35-44 years of age* were significantly more likely to have been interviewed in either Confluence or Frostburg/Big Savage Tunnel compared to the other towns.
- It was significantly <u>less</u> likely for a respondent using the trail with a group member *55-64 years of age* to have been interviewed in either Cumberland or Frostburg/Big Savage Tunnel compared to the other towns.

Q12a. continued →

Subgroup Differences

- Respondents using the trail with at least one group member aged *10-15* and/or *35-54* were significantly more likely to have reported an overnight stay.
- Those accompanied by group member *65+ years of age* were significantly <u>less</u> likely to report an overnight stay.

Note:

Question 12b was asked of all respondents for both themselves and their group members, if applicable.

Question 12b. **How many trips will each person in your group make to the trail this calendar year?**

Number Visits to Trail this Year

	Total	Location of Interview							
		Con-fluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohio-pyle	Rock-wood	West Newton
Bases:	*1272*	*18**	*127*	*22**	*290*	*70*	*307*	*207*	*231*
One time	29.6%	61.1%	22.0%	31.8%	23.4%	28.6%	43.0%	32.9%	18.2%
2-10 times	40.2%	22.2%	35.4%	31.8%	44.8%	25.7%	48.5%	42.5%	30.3%
More than 10 times	35.1%	0.0%	47.2%	40.9%	39.3%	18.6%	19.5%	34.3%	51.5%
Don't know/ No answer	3.9%	16.7%	3.9%	9.1%	0.7%	37.1%	0.0%	1.4%	3.5%

***Caution: small base sizes**

Findings

The majority of the respondents they and/or their fellow group members plan to make more than one trip to the trail this calendar year.

- Four in ten (40.2%) stated that they and/or someone in their group will make *2-10* trips.
- Slightly more than one third (35.1%) reported that they and/or another group member plan to make *more than 10* trips.
- Three in ten (29.6%) mentioned that this was their and/or one of their groups members *only* trip to the trail this year.
- Respondents that reported *one* trip for either themselves or one of their group members were significantly more likely to have been interviewed in either Confluence or Ohiopyle than another town.
- Those who mentioned *2-10* trips for either themselves or another group member were significantly more likely to have been interviewed at Frostburg/Big Savage Tunnel, Ohiopyle, or Rockwood compared to the other towns.

Q12b. continued →

- Respondents citing *more than 10* trip for either themselves or one of their group members were significantly more likely to have been interviewed in Connellsville, Cumberland, Frostburg/Big Savage Tunnel, Rockwood, or West Newton/Cedar Creek than the other towns.

Subgroup Differences

- It was significantly more likely for a respondent that was only visiting the trail *one time* to report an overnight stay.
- Respondents that reported *less than 10* trips to the trail were significantly more likely to report typically using the trail in *spring*, *summer*, or *fall*.
- Those that mentioned *more than 10* trips to the trail were significantly more likely to:
  - have reported that they typically use the trail in *winter*
  - have <u>not</u> reported an overnight stay

Note:

Question 13 was asked of all respondents.

Question 13. **What did you/your group do on the trail today?**

Trail Activity Performed

		Location of Interview							
	Total	Con-fluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohio-pyle	Rock-wood	West Newton
Bases:	***1272***	***18****	***127***	***22****	***290***	***70***	***307***	***207***	***231***
(Net) Biking	88.1%	83.3%	89.8%	95.5%	75.5%	92.9%	97.7%	89.9%	86.6%
Hike/walk	14.5%	22.2%	17.3%	4.5%	23.8%	8.6%	7.5%	14.5%	13.0%
Birding/ bird watching	2.9%	5.6%	2.4%	0.0%	6.2%	4.3%	1.0%	1.9%	2.2%
Jogging/running	2.7%	0.0%	2.4%	0.0%	5.5%	0.0%	0.0%	1.9%	4.8%
Eating/Picnic	1.8%	0.0%	0.0%	0.0%	1.4%	4.3%	4.9%	0.5%	0.0%
Photography	1.5%	11.1%	5.5%	0.0%	0.7%	2.9%	1.6%	0.5%	0.0%

***Caution: small base sizes**

Findings

On the day they were interviewed, the vast majority (88.1%) of the respondents were *biking* and one in seven (14.5%) were *hiking/walking*.

- None of the other activities were mentioned by more than 3% of the respondents.
- Although still a very high proportion, respondents that were interviewed at Frostburg/Big Savage Tunnel were significantly less likely to have been *biking* compared to all of the other towns.
- Respondents that were *hiking/walking* were more likely to have been interviewed at either Confluence or Frostburg/Big Savage Tunnel than the other towns.

Subgroup Differences

- Those that were *biking* were somewhat more likely to:
  - have not reported typical use the trail in *winter*
  - have reported an overnight stay

Q13. continued →

- Respondents that were *hiking/walking* were somewhat more likely to:
  - have reported typical use the trail in *winter*
  - have <u>not</u> reported an overnight stay

Note:

Question 13a was asked of all respondents.

Question 13a. **How many persons in your group <u>brought</u> their own recreational equipment/gear?**

Brought Own Equipment/Gear

		Location of Interview							
	Total	Con-fluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohio-pyle	Rock-wood	West Newton
Bases:	***1272***	***18****	***127***	***22****	***290***	***70***	***307***	***207***	***231***
One	28.7%	16.7%	31.5%	13.6%	30.3%	21.4%	18.6%	28.0%	43.7%
Two	38.4%	27.8%	44.1%	59.1%	27.2%	35.7%	45.0%	42.5%	36.4%
Three or more	22.8%	27.8%	18.9%	27.3%	17.6%	32.9%	30.3%	23.2%	17.3%
None	10.1%	27.8%	5.5%	0.0%	24.8%	10.0%	6.2%	6.3%	2.6%

***Caution: small base sizes**

Findings

The vast majority of the respondents and/or the members of their group brought their own equipment/gear to the trail that day.

- Only one in ten (10.1%) respondents reported that *none* of the members of their group brought their own equipment/gear.
- Respondents that cited *none* were significantly more likely to have been interviewed in either Confluence or Frostburg/Big Savage Tunnel compared to those interviewed in other towns.
- Those reporting that *one* person brought their own equipment/gear were significantly more likely to have been interviewed in West Newton/Cedar Creek than any of the other towns.

<u>*Subgroup Differences*</u>

- Respondents mentioning either *one* or *none* were significantly <u>less</u> likely to have reported an overnight stay.
- Those mentioning that *three or more* people were significantly more likely to have reported an overnight stay.

Note:

Question 13b was asked of all respondents.

Question 13b. **How many persons in your group rented their equipment/gear?**

Rented Equipment/Gear

		Location of Interview							
	Total	Con-fluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohio-pyle	Rock-wood	West Newton
Bases:	***1272***	***18****	***127***	***22****	***290***	***70***	***307***	***207***	***231***
One	1.1%	11.1%	0.0%	0.0%	0.7%	0.0%	2.6%	0.0%	0.9%
Two	2.0%	5.6%	0.8%	0.0%	1.0%	4.3%	4.9%	0.5%	0.4%
Three or more	2.6%	0.0%	0.0%	0.0%	5.5%	0.0%	3.9%	1.0%	1.3%
None	94.3%	83.3%	99.2%	100.0%	92.8%	95.7%	88.6%	98.6%	97.4%

***Caution: small base sizes**

Findings

The vast majority (94.3%) stated that *none* of the members of their group rented equipment/gear at the trail that day.

- Respondents reporting that at least *one* people in their group had rented equipment/gear were significantly more likely to have been interviewed in Ohiopyle compared to all the other towns.

Subgroup Differences

- Those reporting that at least *one* of the members in their group had rented equipment/gear were significantly more likely to have reported an overnight stay.

Note:

Question 14 was asked of all respondents.

Question 14. What was your/your group's primary reason for using the trail today?

Primary Reason for Using Trail

		Location of Interview							
	Total	Con-fluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohio-pyle	Rock-wood	West Newton
Bases:	***1272***	***18****	***127***	***22****	***290***	***70***	***307***	***207***	***231***
(Net) Recreational activity	59.7%	72.2%	50.4%	72.7%	50.7%	65.7%	73.6%	57.5%	55.8%
(Net) Health and/or Fitness	38.3%	22.2%	45.7%	22.7%	47.6%	31.4%	24.4%	40.6%	43.7%
Commuting	0.5%	0.0%	0.8%	0.0%	0.7%	1.4%	0.0%	1.0%	0.0%
Refused/No answer	0.2%	0.0%	0.8%	4.5%	0.0%	0.0%	0.0%	0.0%	0.0%

****Caution: small base sizes***

Findings

Very few respondents reported using the trail for any other purpose other than *recreational activity* (89.7%) and/or *health/fitness* (38.3%).

- Respondents using the trail for a *recreational activity* were more likely to have been interviewed in Confluence, Cumberland, Meyersdale, or Ohiopyle compared to the other towns.
- Those using the trail for *health and/or fitness* were significantly more likely to have been interviewed in Connellsville, Frostburg/Big Savage Tunnel, Rockwood, or West Newton/Cedar Creek compared to the other towns.

Subgroup Differences

- Respondents using the trail for a *recreational activity* were significantly more likely to:
  - have not reported typical use of the trail in *winter*
  - have reported an overnight stay
- Those using the trail for *health and/or fitness* were significantly more likely to:
  - have reported typical use of the trail in *winter*
  - have not reported an overnight stay

Note:

Question 15 was asked of all respondents.

Question 15. **Have you/your group, or do you/your group plan to, purchase or rent equipment, food, clothing, souvenirs, etc., in the communities along the trail or trailhead today?**

Purchase/Plan to Purchase

		Location of Interview							
	Total	Con-fluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohio-pyle	Rock-wood	West Newton
Bases:	***1272***	***18****	***127***	***22****	***290***	***70***	***307***	***207***	***231***
Yes	67.5%	72.2%	59.8%	68.2%	63.8%	50.0%	80.8%	59.9%	70.1%
No	32.5%	27.8%	40.2%	31.8%	36.2%	50.0%	19.2%	40.1%	29.9%

***Caution: small base sizes**

Findings

The majority (67.5%) of respondents mentioned that they did plan to make purchases in the communities along the trail on the day they were interviewed.

- Respondents reporting intent to make purchases were significantly more likely to have been interviewed in Ohiopyle compared to all other trail towns.

Subgroup Differences

- Those mentioning intent to make purchases were significantly more likely to have reported an overnight stay.

Note:
Question 15a was asked of all respondents.

Question 15a. **What do you estimate your total spending will be in the communities today on.....?**

Your Estimated Spending

	Total	Location of Interview							
		Con-fluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohio-pyle	Rock-wood	West Newton
Bases:	***858***	***13****	***76***	***15****	***185***	***35****	***248***	***124***	***162***
Beverages									
Zero	43.9%	23.1%	38.2%	46.7%	35.7%	54.3%	48.0%	48.4%	45.7%
Less than $10	45.6%	38.5%	47.4%	33.3%	54.6%	34.3%	40.7%	43.5%	47.5%
$10 or more	10.5%	38.5%	14.5%	20.0%	9.7%	11.4%	11.3%	8.1%	6.8%
Mean**	$5.96	$8.18	$6.45	$10.94	$5.03	$8.12	$6.22	$4.89	$4.80
Clothing									
Zero	93.5%	100.0%	94.7%	86.7%	97.8%	91.4%	91.1%	83.9%	99.4%
Less than $10	0.9%	0.0%	2.6%	0.0%	1.1%	2.9%	1.2%	0.0%	0.0%
$10 or more	5.6%	0.0%	2.6%	13.3%	1.1%	5.7%	7.7%	16.1%	0.6%
Mean**	$22.02	$0.00	$9.50	$30.00	$12.50	$12.67	$25.45	$23.85	$10.00
Candy/Snacks									
Zero	79.1%	61.5%	71.1%	73.3%	84.9%	77.1%	81.0%	71.8%	81.5%
Less than $10	16.4%	23.1%	21.1%	13.3%	11.4%	20.0%	12.1%	27.4%	17.3%
$10 or more	4.4%	15.4%	7.9%	13.3%	3.8%	2.9%	6.9%	0.8%	1.2%
Mean**	$6.07	$6.00	$6.68	$16.50	$6.75	$4.50	$7.22	$4.42	$4.17
Daily Equipment Rental (bikes, etc.)									
Zero	95.1%	92.3%	98.7%	93.3%	99.5%	100.0%	88.7%	98.4%	95.1%
Less than $10	0.8%	0.0%	1.3%	0.0%	0.0%	0.0%	1.6%	0.0%	1.2%
$10 or more	4.1%	7.7%	0.0%	6.7%	0.5%	0.0%	9.7%	1.6%	3.7%
Mean**	$21.86	$25.00	$9.00	$40.00	$25.00	$0.00	$22.64	$35.00	$14.38
Ice Cream									
Zero	76.3%	61.5%	84.2%	66.7%	75.7%	85.7%	66.1%	74.2%	90.7%
Less than $10	21.0%	38.5%	13.2%	26.7%	22.2%	11.4%	29.4%	22.6%	9.3%
$10 or more	2.7%	0.0%	2.6%	6.7%	2.2%	2.9%	4.4%	3.2%	0.0%
Mean**	$4.87	$4.40	$4.75	$12.00	$4.82	$6.40	$5.06	$4.09	$2.93
Restaurants									
Zero	39.3%	15.4%	51.3%	40.0%	49.2%	48.6%	25.8%	34.7%	46.3%
Less than $10	8.5%	0.0%	11.8%	0.0%	1.1%	5.7%	12.9%	8.1%	11.1%
$10 or more	52.2%	84.6%	36.8%	60.0%	49.7%	45.7%	61.3%	57.3%	42.6%
Mean**	$19.62	$20.91	$17.16	$23.56	$19.32	$26.33	$21.04	$19.14	$16.48

****Caution: small base sizes***
*****Note: mean calculation did not include $0 values***

Q15a. continued →

		Location of Interview							
	Total	Con-fluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohio-pyle	Rock-wood	West Newton
Bases:	*858*	*13**	*76*	*15**	*185*	*35**	*248*	*124*	*162*
Souvenirs									
Zero	89.6%	84.6%	96.1%	86.7%	90.8%	91.4%	91.1%	88.7%	84.0%
Less than $10	3.4%	7.7%	2.6%	0.0%	0.5%	2.9%	3.6%	3.2%	6.8%
$10 or more	7.0%	7.7%	1.3%	13.3%	8.6%	5.7%	5.2%	8.1%	9.3%
Mean**	$12.57	$8.50	$6.67	$27.50	$12.88	$21.67	$12.70	$11.07	$11.87
Transportation (shuttling, taxi, etc.)									
Zero	98.4%	92.3%	100.0%	93.3%	98.9%	97.1%	97.2%	100.0%	98.8%
Less than $10	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%
$10 or more	1.5%	7.7%	0.0%	6.7%	1.1%	2.9%	2.8%	0.0%	0.6%
Mean**	$50.86	$25.00	$0.00	$40.00	$15.00	$125.00	$67.86	$0.00	$8.50
Other (miscellaneous) items									
Zero	92.4%	100.0%	92.1%	66.7%	95.1%	91.4%	94.4%	94.4%	87.0%
Less than $10	3.1%	0.0%	2.6%	6.7%	0.0%	2.9%	2.8%	2.4%	8.0%
$10 or more	4.4%	0.0%	5.3%	26.7%	4.9%	5.7%	2.8%	3.2%	4.9%
Mean**	$14.68	$0.00	$26.33	$18.20	$13.33	$23.67	$12.07	$21.86	$9.14
Individual Package Cost									
Zero	92.1%	76.9%	96.1%	86.7%	84.9%	100.0%	94.8%	90.3%	95.7%
Less than $200	4.2%	23.1%	3.9%	13.3%	0.0%	0.0%	4.4%	8.9%	3.7%
$200 or more	3.7%	0.0%	0.0%	0.0%	15.1%	0.0%	0.8%	0.8%	0.6%
Mean**	$350.00	$31.67	$11.67	$25.00	$702.29	$0.00	$176.08	$48.25	$155.00

Caution: small base sizes
****Note: mean calculation did not include $0 values***

Findings

Respondents were asked to report how much they spent/planned to spend on several different items and services. Overall, the vast majority of the respondents spent/planned to spend *zero dollars* on all but two of the items/services.

- The majority of the respondents spent/planned to spend money at **restaurants**, with over half (52.2%) mentioning *$10 or more* and 8.5% mentioning *less than $10*. The mean expenditure was $19.62.
- The majority of the respondents also spent/planned to purchase **beverages**, with nearly half (45.6%) citing *less than $10* and 10.5% citing *$10 or more*. The mean expenditure was $5.96.

Q15a. continued →

- The only other items/services that more than one in five respondents spent/planned to spend money on were:
  - **Candy/snacks** (16.4%, *less than $10* & 4.4%, *$10 or more*)
  - **Ice cream** (21.0%, *less than $10* & 2.7%, *$10 or more*)

- Respondents that spent/planned to spend money on **clothing** were significantly more likely to have been interviewed in either Cumberland or Rockwood than one of the other towns.
- Those who spent/planned to spend money on **daily equipment rentals** were significantly more likely to have been interviewed in Ohiopyle compared to any of the other towns.
- Respondents who spent/planned to spend money on **ice cream** were more likely to have been interviewed in Confluence, Cumberland, Ohiopyle, or Rockwood than any of the other towns.
- Those that spent/planned to spend money in **restaurants** were significantly more likely to have been interviewed in Confluence, Cumberland, Ohiopyle, or Rockwood than in one of the other towns.
- Respondents that spent/planned to spend money on **other (miscellaneous) items** were significantly more likely to have been interviewed in either Cumberland or West Newton/Cedar Creek compared to one of the other towns.
- Those who spent/planned to spend *$200 or more* on **package costs** were significantly more likely to have been interviewed at Frostburg/Big Savage Tunnel than any of the other towns.

Subgroup Differences

- In general, respondents that spent/planned to spend *zero dollars* on items/services in the communities were significantly less likely to report an overnight stay.

Note:

Question 15b was asked of all respondents that reported traveling with at least one other person and also reported purchasing or planning to purchase items in the trail communities.

Question 15b. **What do you estimate your group's total spending will be in the communities today on....?**

Estimated Group Spending

	Total	Location of Interview: Con-fluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohio-pyle	Rock-wood	West Newton
Bases:	***635***	***9****	***58***	***13****	***130***	***27****	***202***	***98***	***98***
Beverages									
Zero	48.3%	22.2%	46.6%	46.2%	46.9%	51.9%	53.5%	44.9%	45.9%
Less than $25	43.5%	55.6%	43.1%	23.1%	47.7%	37.0%	37.1%	48.0%	50.0%
$25 or more	8.2%	22.2%	10.3%	30.8%	5.4%	11.1%	9.4%	7.1%	4.1%
Mean**	$17.71	$23.57	$13.39	$28.57	$12.77	$31.85	$21.04	$16.10	$16.74
Clothing									
Zero	94.6%	100.0%	100.0%	69.2%	99.2%	88.9%	92.6%	89.8%	99.0%
Less than $25	1.7%	0.0%	0.0%	0.0%	0.8%	0.0%	1.5%	6.1%	1.0%
$25 or more	3.6%	0.0%	0.0%	30.8%	0.0%	11.1%	5.9%	4.1%	0.0%
Mean**	$57.26	$0.00	$0.00	$42.50	$20.00	$63.33	$82.47	$31.00	$20.00
Candy/Snacks									
Zero	79.4%	77.8%	82.8%	53.8%	83.8%	77.8%	86.6%	63.3%	76.5%
Less than $25	16.7%	22.2%	13.8%	15.4%	13.1%	18.5%	9.4%	31.6%	22.4%
$25 or more	3.9%	0.0%	3.4%	30.8%	3.1%	3.7%	4.0%	5.1%	1.0%
Mean**	$17.10	$13.00	$14.80	$30.83	$20.14	$13.33	$24.26	$13.74	$9.96
Daily Equipment Rental (bikes, etc.)									
Zero	92.3%	77.8%	96.6%	76.9%	98.5%	92.6%	86.6%	94.9%	93.9%
Less than $25	2.4%	0.0%	3.4%	0.0%	0.0%	0.0%	3.5%	2.0%	4.1%
$25 or more	5.4%	22.2%	0.0%	23.1%	1.5%	7.4%	9.9%	3.1%	2.0%
Mean**	$56.57	$37.50	$15.00	$43.33	$80.50	$100.00	$50.41	$123.00	$33.33
Ice Cream									
Zero	73.4%	66.7%	91.4%	46.2%	77.7%	85.2%	63.9%	63.3%	87.8%
Less than $25	23.0%	33.3%	8.6%	23.1%	19.2%	14.8%	30.2%	33.7%	12.2%
$25 or more	3.6%	0.0%	0.0%	30.8%	3.1%	0.0%	5.9%	3.1%	0.0%
Mean**	$15.66	$10.33	$5.60	$26.43	$12.76	$12.50	$220.33	$11.58	$6.75
Restaurants									
Zero	34.6%	11.1%	41.4%	46.2%	45.4%	51.9%	23.3%	34.7%	35.7%
Less than $25	16.2%	22.2%	25.9%	7.7%	11.5%	0.0%	18.3%	16.3%	17.3%
$25 or more	49.1%	66.7%	32.8%	46.2%	43.1%	48.1%	58.4%	49.0%	46.9%
Mean**	$64.56	$53.75	$41.41	$43.57	$63.10	$131.54	$67.80	$67.48	$57.63

***Caution: small base sizes**

****Note: mean calculation did not include $0 values**

Q15b. continued →

	Total	Con-fluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohio-pyle	Rock-wood	West Newton
		Location of Interview							
Bases:	***635***	***9****	***58***	***13****	***130***	***27****	***202***	***98***	***98***
Souvenirs									
Zero	87.2%	88.9%	98.3%	76.9%	89.2%	85.2%	91.1%	86.7%	72.4%
Less than $25	7.9%	11.1%	1.7%	0.0%	6.2%	3.7%	5.4%	9.2%	19.4%
$25 or more	4.9%	0.0%	0.0%	23.1%	4.6%	11.1%	3.5%	4.1%	8.2%
Mean**	$24.53	$10.00	$10.00	$43.33	$24.29	$46.25	$25.39	$29.54	$17.44
Transportation (shuttling, taxi, etc.)									
Zero	98.0%	100.0%	100.0%	76.9%	99.2%	96.3%	97.5%	100.0%	96.9%
Less than $25	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%	2.0%
$25 or more	1.6%	0.0%	0.0%	23.1%	0.8%	3.7%	2.0%	0.0%	1.0%
Mean**	$116.70	$0.00	$0.00	$43.33	$30.00	$100.00	$218.00	$0.00	$55.67
Other (miscellaneous) items									
Zero	91.3%	100.0%	93.1%	61.5%	94.6%	92.6%	93.6%	91.8%	83.7%
Less than $25	6.5%	0.0%	6.9%	7.7%	4.6%	7.4%	4.5%	5.1%	14.3%
$25 or more	2.2%	0.0%	0.0%	30.8%	0.8%	0.0%	2.0%	3.1%	2.0%
Mean**	$20.96	$0.00	$13.50	$38.00	$14.29	$7.50	$24.92	$33.38	$12.69
Individual Package Cost									
Zero	89.0%	88.9%	89.7%	61.5%	83.1%	96.3%	93.6%	81.6%	95.9%
Less than $1K	6.8%	11.1%	8.6%	38.5%	1.5%	3.7%	4.5%	17.3%	3.1%
$1K or more	4.3%	0.0%	1.7%	0.0%	15.4%	0.0%	2.0%	1.0%	1.0%
Mean**	$2,970	$65	$884	$37	$4,150	$300	$7,471	$180	$2,585

***Caution: small base sizes**
****Note: mean calculation did not include $0 values**

Findings

Respondents who reported traveling with at least one other person were then asked to estimate the spending of their group on the same items and services. Similar to the trend observed for respondent's own spending, the vast majority of the groups spent/planned to spend *zero dollars* on all but two of the items/services.

- Once again, the only two items/services that the majority spent/planned to spend money on were:
  - **Restaurants** (16.2%, *less than $25*; 49.1%, *$25 or more*; mean = *$64.56*)
  - **Beverages** (43.5%, *less than $25*; 8.2%, *$25 or more*; mean = *$17.71*)

Q15b. continued →

- The only other items/services that more than one in five groups spent/planned to spend money on were:
  - **Candy/snacks** (16.7%, *less than $25* & 3.9%, *$25 or more*)
  - **Ice cream** (23.0%, *less than $25* & 3.6%, *$25 or more*)
- Respondents that spent/planned to spend money on **clothing** were more likely to have been interviewed in either Ohiopyle or Rockwood compared to other towns.
- It was more likely for someone that spent/planned to spend money on **candy/snacks** to have been interviewed in Cumberland or Rockwood than one of the other towns.
- Respondents who spent/planned to spend money on **daily equipment rental** were more likely to have been interviewed in Ohiopyle than any of the other towns.
- Those that spent/planned to spend money on **ice cream** were more likely to have been interviewed in Cumberland, Ohiopyle, or Rockwood compared to other towns.
- It was more likely for someone who spent/planned to spend money at **restaurants** to have been interviewed in Confluence or Ohiopyle than one of the other towns.
- Respondents that spent/planned to spend money on **souvenirs** and/or **other (miscellaneous) items** were more likely to have been interviewed in West Newton/Cedar Creek than any of the other towns.
- Those who spent/planned to spend *less than $1000* on **package costs** were more likely to have been interviewed in Rockwood compared to other towns.
- Those who spent/planned to spend *$1000 or more* on **package costs** were more likely to have been interviewed at Frostburg/Big Savage Tunnel than in any of the other towns.

Subgroup Differences

- In general, groups that spent/planned to spend *zero dollars* on items/ services in the communities were significantly less likely to report an overnight stay.

Note:

Question 16 was asked of all respondents.

Question 16. In conjunction with your trip, have or will you plan an overnight stay?

Overnight Stay

	Total	Location of Interview							
		Con-fluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohio-pyle	Rock-wood	West Newton
Bases:	***1272***	***18****	***127***	***22****	***290***	***70***	***307***	***207***	***231***
Yes	40.8%	66.7%	33.9%	45.5%	27.2%	62.9%	50.5%	48.8%	32.5%
No	59.2%	33.3%	66.1%	54.5%	72.8%	37.1%	49.5%	51.2%	67.5%

***Caution: small base sizes**

Findings

Four in ten (40.8%) of the respondents reported that they did plan an overnight stay in conjunction with their trip on the trail.

- Respondents interviewed in either Confluence or Meyersdale were significantly more likely to have planned an overnight stay than those interviewed in the other towns.
- Those that did not plan an overnight stay were significantly more likely to have been interviewed in Connellsville, Frostburg/Big Savage Tunnel, or West Newton/Cedar Creek compared to the other towns.

Subgroup Differences

- No significant differences were observed by subgroup.

Note:

Question 16a was asked of all respondents that reported an overnight stay in conjunction with their trip.

Question 16a. In what type of accommodation do you plan on staying?

Overnight Accommodation

	Total	Location of Interview							
		Con-fluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohio-pyle	Rock-wood	West Newton
Bases:	***519***	***12****	***43***	***10****	***79***	***44***	***155***	***101***	***75***
Campground	38.9%	16.7%	48.8%	50.0%	29.1%	22.7%	47.7%	37.6%	38.7%
Bed and breakfast	32.6%	58.3%	30.2%	10.0%	39.2%	43.2%	24.5%	34.7%	33.3%
Motel/Hotel/Hostel	22.0%	8.3%	23.3%	40.0%	19.0%	20.5%	26.5%	20.8%	17.3%
Friend or relatives home	6.9%	0.0%	4.7%	0.0%	10.1%	9.1%	4.5%	11.9%	4.0%
Not specified/ Refused	0.6%	0.0%	0.0%	0.0%	1.3%	2.3%	0.6%	0.0%	0.0%

***Caution: small base sizes**

Findings

Among respondents that did plan an overnight stay, the most frequently mentioned accommodations were *campgrounds* (38.9%) and/or *bed and breakfasts* (32.6%).

- Just more than one in five (22.0%) mentioned a *motel/hotel/hostel.*
- The only other accommodation cited by more than 2% of the respondents was *friend or relatives home.*
- Respondents that mentioned *campgrounds* were significantly more likely to have been interviewed in either Connellsville or Ohiopyle compared to those in the other towns.
- It was more likely for those who reported *bed and breakfasts* to have been interviewed in Confluence, Frostburg/Big Savage Tunnel, Meyersdale, Rockwood, or West Newton/Cedar Creek than either Cumberland or Ohiopyle.

Subgroup Differences

- No significant differences were observed by subgroup.

Note:

Question 16b was asked of all respondents that reported an overnight stay, at an accommodation other than a friend's or relative's house, in conjunction with their trip. Only those that reported nightly spending on lodging were asked to estimate the amount.

Question 16b. **How much do you plan to spend for your overnight accommodations (per night)?**

Amount Paid for Accommodations

		Location of Interview							
	Total	Con-fluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohio-pyle	Rock-wood	West Newton
Bases:	***486***	***12****	***42****	***10****	***71***	***40****	***148***	***91***	***72***
Included in my package cost	7.6%	8.3%	2.4%	20.0%	28.2%	2.5%	1.4%	1.1%	12.5%
Paid each evening for accomodations	91.6%	91.7%	97.6%	80.0%	71.8%	97.5%	96.6%	97.8%	87.5%
No answer/Refused	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%	1.1%	0.0%
Bases: $ per night	***445***	***11****	***42****	***10****	***71***	***40****	***148***	***91***	***72***
-Zero	*8.1%*	*0.0%*	*7.3%*	*0.0%*	*3.9%*	*28.2%*	*6.3%*	*3.4%*	*12.7%*
-Less than $25	*23.4%*	*9.1%*	*26.8%*	*37.5%*	*2.0%*	*15.4%*	*28.7%*	*29.2%*	*23.8%*
-$25-$99	*42.5%*	*45.5%*	*43.9%*	*37.5%*	*49.0%*	*25.6%*	*40.6%*	*47.2%*	*44.4%*
-$100 or more	*26.1%*	*45.5%*	*22.0%*	*25.0%*	*45.1%*	*30.8%*	*24.5%*	*20.2%*	*19.0%*
Mean ($/per night)	***$64.81***	***$85.45***	***$64.12***	***$60.00***	***$86.67***	***$53.74***	***$62.77***	***$65.17***	***$55.57***

***Caution: small base sizes**

Findings

The vast majority (91.6%) of the respondents who did not stay with their friends or relatives paid for their overnight accommodations each evening, which most often cost the respondents between *$25-$99* (42.5%).

- About one-quarter each reported costs of either *less than $25* (23.4%) or *$100 or more* (26.1%).
- Less than one in ten (8.1%) indicated that they paid *zero dollars* for their accommodations.
- Those who mentioned the fact that their accommodations were *included in my package cost* were significantly more likely to have been interviewed in Frostburg/Big Savage Tunnel than all of the other towns, excluding Cumberland.

Q16b. continued →

- Respondent that reported *complimentary* (*$0 per night*) accommodations were significantly more likely to have been interviewed in Meyersdale than the other towns.
- Those that cited nightly accommodation costs of *less than $25* were significantly <u>less</u> likely to have been interviewed in either Confluence or Frostburg/Big Savage Tunnel compared to all of the other towns.
- Respondents mentioning nightly costs of *$100 or more* were significantly more likely to have been interviewed in either Confluence or Frostburg/Big Savage Tunnel than the other towns.

Subgroup Differences

- No significant differences were observed by subgroup.

Note:

Question 16c was asked of all respondents that reported an overnight stay, at an accommodation other than a friend's or relative's house, in conjunction with their trip.

Question 16c. **How many overnight stays have you/do you plan to have in conjunction with your visit to the trail?**

Number of Overnight Stays

		Location of Interview							
	Total	Con-fluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohio-pyle	Rock-wood	West Newton
Bases:	***486***	***12***	***42***	***10***	***71***	***40***	***148***	***91***	***72***
Tonight only	19.8%	16.7%	19.0%	20.0%	8.5%	30.0%	23.0%	7.7%	34.7%
Two or more	73.3%	83.3%	73.8%	70.0%	69.0%	60.0%	75.0%	91.2%	56.9%
Not sure	7.0%	0.0%	7.1%	10.0%	22.5%	10.0%	2.0%	1.1%	8.3%

Caution: small base sizes

Findings

The majority (73.3%) of the respondents who did not stay with their friends or relatives reported planning *two or more* overnight stays.

- One in five (19.8%) stated that their overnight stay was for *tonight only*.
- Less than one in ten (7.0%) were *not sure* how many overnight stays they will have.
- Respondents whose overnight stays were limited to *tonight only* were significantly more likely to have been interviewed in Meyersdale, Ohiopyle, or West Newton/Cedar Creek compared to those interviewed in either Frostburg/Big Savage Tunnel or Rockwood.
- It was significantly more likely that those who mentioned planning an overnight stay of *two nights or more* to have been interviewed in Rockwood than any of the other towns.
- Those who were *not sure* were significantly more likely to have been interviewed at Frostburg/Big Savage Tunnel than another town.

Subgroup Differences

- No significant differences were observed by subgroup.

Note:

Question 17 was asked of all respondents.

Question 17. **How did you originally hear or find out about the trail?**

Source of Awareness

	Total	Location of Interview							
		Con-fluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohio-pyle	Rock-wood	West Newton
Bases:	***1272***	***18****	***127***	***22****	***290***	***70***	***307***	***207***	***231***
Family and Friends	50.2%	44.4%	43.3%	18.2%	55.9%	47.1%	51.1%	45.9%	53.7%
Live by the trail	17.1%	11.1%	23.6%	27.3%	16.9%	14.3%	11.1%	21.3%	18.6%
Internet search/ web site	15.3%	16.7%	16.5%	18.2%	12.4%	27.1%	15.6%	15.9%	13.4%
Bike/Recreation shop or store	7.6%	0.0%	3.9%	9.1%	12.8%	7.1%	6.5%	4.3%	8.2%
Newspaper	6.1%	5.6%	8.7%	4.5%	3.8%	12.9%	4.2%	6.8%	7.4%
Driving past/ roadside sign	5.1%	0.0%	3.1%	0.0%	2.1%	1.4%	4.9%	3.4%	13.9%
Magazine	4.0%	5.6%	3.1%	9.1%	0.0%	10.0%	4.9%	4.8%	5.2%
Don't know/ Don't recall	6.4%	5.6%	8.7%	4.5%	4.1%	12.9%	4.6%	7.2%	7.8%

***Caution: small base sizes**

Findings

The most frequently mentioned source of awareness for the trail was *family and friends* (50.2%).

- About one in six each reported that they either became aware of the trail because the *live by the trail* (17.1%) and/or from an *internet search/website* (15.3%).
- None of the other sources were mentioned by more than one in ten respondents.
- Respondents that reported learning of the trail through *family and friends* were significantly <u>less</u> likely to have been interviewed in Cumberland compared to all of the other towns.
- It was significantly more likely that a respondent, who reported awareness because *they live by the trail*, to have been interviewed in Connellsville, Cumberland, Frostburg/Big Savage Tunnel, Rockwood, or West Newton/Cedar Creek compared to Ohiopyle.

Q17. continued →

- Respondents that mentioned learning about the trail from an *internet search/web site* were:
  - significantly more likely to have reported an overnight stay
  - somewhat more likely to have been interviewed in Meyersdale compared to the other regions
- Those that learned of the trail from a *bike/recreation shop or store* were significantly more likely to have been interviewed at Frostburg/Big Savage Tunnel than another town.
- Respondents that became aware of the trail by *driving past/seeing a roadside sign* were significantly more likely to have been interviewed in West Newton/Cedar Creek than any other town.

Subgroup Differences

- Respondents that cited awareness because *they live by the trail* were significantly more likely to:
  - have reported typical use in the *winter*
  - have <u>not</u> reported an overnight stay
- Those that learned of the trail through either an *internet search/web site* were significantly more likely to have reported an overnight stay.
- Respondents that learned of the trail by *driving past/seeing a roadside sign* were significantly <u>less</u> likely to report an overnight stay.

Note:

Question 18 was asked of all respondents.

Question 18. Which category best describes your total household income before taxes?

Household Income of Respondent

	Total	Location of Interview: Con-fluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohio-pyle	Rock-wood	West Newton
Bases:	*1272*	*18**	*127*	*22**	*290*	*70*	*307*	*207*	*231*
Less than $25K	9.0%	0.0%	8.7%	9.1%	20.0%	2.9%	5.9%	4.3%	6.1%
$25K - $50K	23.9%	11.1%	19.7%	31.8%	35.5%	25.7%	15.3%	19.3%	26.8%
$51K - $100K	32.5%	33.3%	33.9%	36.4%	25.2%	31.4%	37.5%	38.6%	28.6%
$101K - $150K	12.8%	16.7%	7.9%	0.0%	8.3%	8.6%	19.5%	19.3%	8.7%
$151K - $200K	4.5%	11.1%	5.5%	4.5%	3.1%	11.4%	4.9%	3.4%	3.5%
More than $200K	3.9%	0.0%	3.9%	0.0%	3.1%	4.3%	5.9%	4.8%	2.2%
Refused	13.4%	27.8%	20.5%	18.2%	4.8%	15.7%	11.1%	10.1%	24.2%

***Caution: small base sizes**

Findings

The most frequently mentioned household income category was *$51K-$100K* (32.5%).

- Nearly one-quarter (23.9%) reported household income of *$25K-$50K*.
- One in eight (12.8%) cited household income of *$101K-$150K*.
- Respondents that reported household income of *less than $50K* were significantly more likely to have been interviewed at Frostburg/Big Savage Tunnel than any other town.
- Those mentioning household income of *$101K-$150K* were significantly more likely to have been interviewed in either Ohiopyle or Rockwood compared to the other towns.

Subgroup Differences

- Respondents citing household income of *less than $50K* were significantly less likely to have reported an overnight stay.
- Those mentioning household income of *more than $100K* were significantly more likely to have reported an overnight stay.

Note:

Question 19 was asked of all respondents.

Question 19. **How would you rate your overall experience on the trail today?**

Overall Experience on Trail

		Location of Interview							
	Total	Con-fluence	Conne-llsville	Cum-berland	Frost-burg	Meyer-sdale	Ohio-pyle	Rock-wood	West Newton
Bases:	*1242*	*18**	*116*	*20**	*281*	*68*	*307*	*206*	*226*
5 - Excellent	70.4%	66.7%	67.2%	60.0%	62.6%	83.8%	77.9%	71.8%	67.3%
4 - Very good	21.8%	27.8%	26.7%	20.0%	18.1%	14.7%	20.5%	23.3%	26.1%
Top-two box	*92.2%*	*94.4%*	*94.0%*	*80.0%*	*80.8%*	*98.5%*	*98.4%*	*95.1%*	*93.4%*
3 - Good	4.8%	0.0%	5.2%	20.0%	8.2%	1.5%	1.6%	3.4%	5.8%
2 - Fair	2.9%	5.6%	0.9%	0.0%	10.7%	0.0%	0.0%	1.0%	0.9%
1 - Poor	0.2%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	0.5%	0.0%
Mean	*4.6*	*4.6*	*4.6*	*4.4*	*4.3*	*4.8*	*4.8*	*4.7*	*4.6*

***Caution: small base sizes**

Findings

When asked to rate their the quality of their experience on the trail that day, the vast majority (92.2%) of the respondents provide a top-two box score, driven by seven in ten (70.4%) that provided a top-box, *excellent,* rating.

- Although very high ratings were received at each trailhead, respondents were significantly less likely to have given a top-two box score if they had been interviewed in either Cumberland or Frostburg/Big Savage Tunnel compared to the other towns.

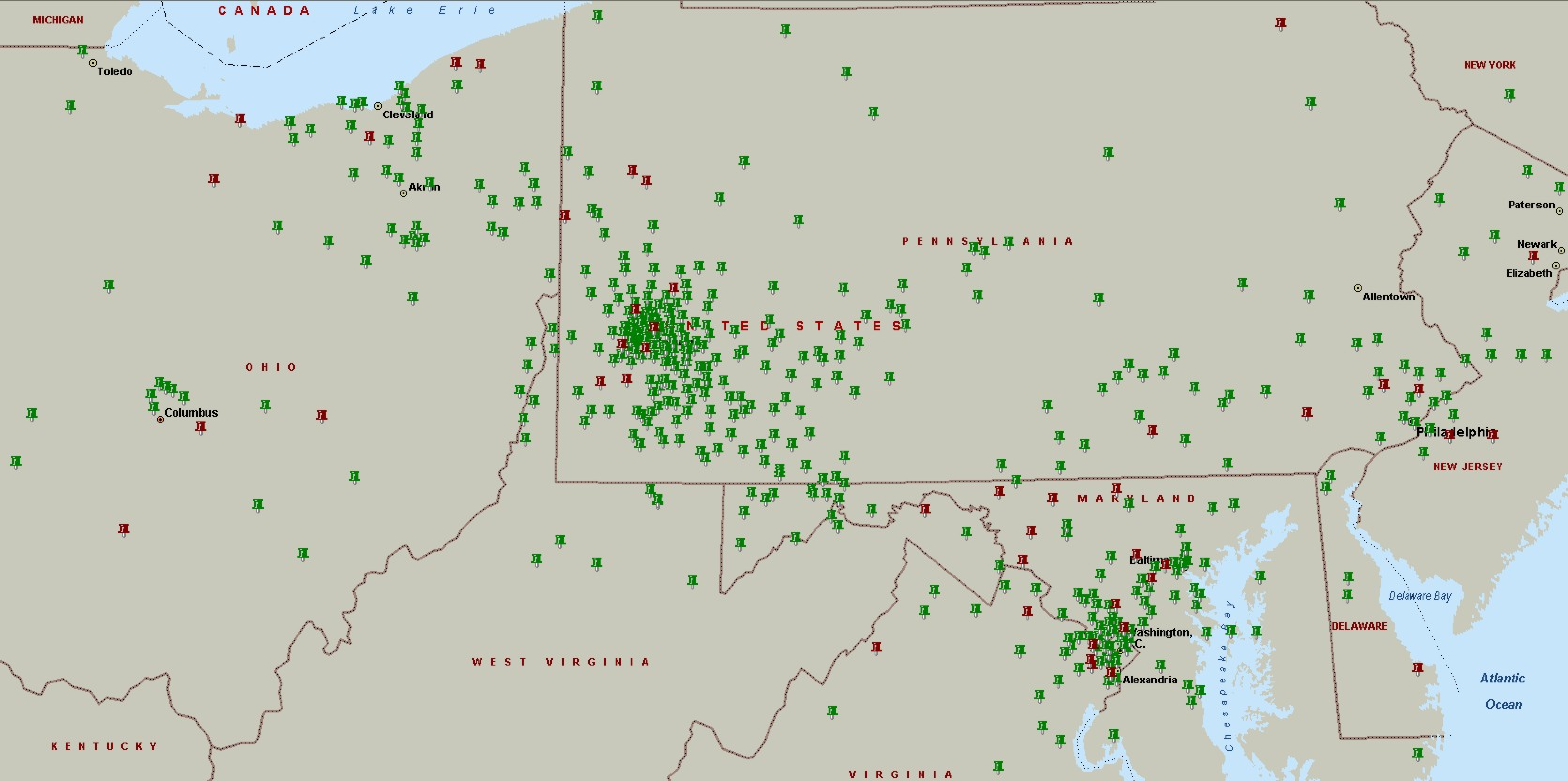
Subgroup Differences

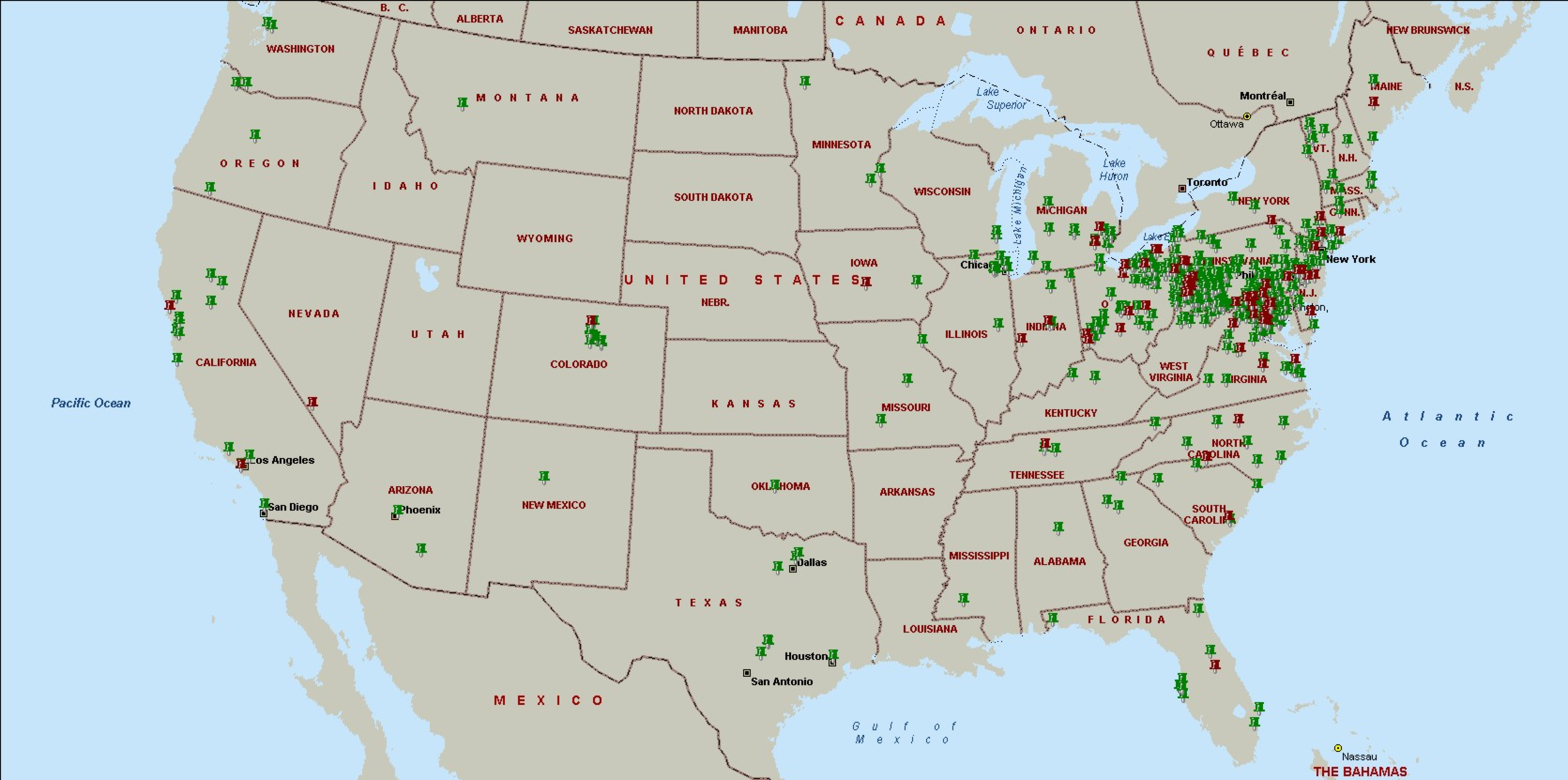
- Respondents that provided a top-two box rating were significantly more likely to have reported an overnight stay.

Appendix A – ZIP/Postal Code Maps

(On the Maps: Green PINS* = Visitors; Red PINS* = Non-visitors)

Caution: PINS do not represent concentration levels (i.e., if a zip code was provided more than one trail user it is still represented by only a single PIN).


MICHIGAN
CANADA
Lake Erie
Toledo
Cleveland
Akron
NEW YORK
PENNSYLVANIA
Paterson
Newark
Elizabeth
Allentown
UNITED STATES
OHIO
Columbus
Philadelphia
NEW JERSEY
MARYLAND
Baltimore
Washington, D.C.
Alexandria
Delaware Bay
DELAWARE
Atlantic Ocean
Chesapeake Bay
WEST VIRGINIA
KENTUCKY
VIRGINIA



B. C.
ALBERTA
SASKATCHEWAN
MANITOBA
CANADA
ONTARIO
QUÉBEC
NEW BRUNSWICK
N.S.
MAINE
Montréal
Ottawa
WASHINGTON
MONTANA
NORTH DAKOTA
MINNESOTA
Lake Superior
OREGON
IDAHO
SOUTH DAKOTA
WISCONSIN
Lake Michigan
Lake Huron
Toronto
VT.
N.H.
MASS.
CONN.
NEW YORK
MICHIGAN
WYOMING
UNITED STATES
IOWA
Chicago
New York
NEBR.
N.J.
NEVADA
UTAH
ILLINOIS
INDIANA
CALIFORNIA
COLORADO
WEST VIRGINIA
VIRGINIA
Pacific Ocean
KANSAS
MISSOURI
KENTUCKY
Atlantic Ocean
NORTH CAROLINA
Los Angeles
TENNESSEE
ARIZONA
OKLAHOMA
ARKANSAS
NEW MEXICO
San Diego
Phoenix
SOUTH CAROLINA
GEORGIA
MISSISSIPPI
ALABAMA
Dallas
TEXAS
LOUISIANA
FLORIDA
Houston
San Antonio
MEXICO
Gulf of Mexico
Nassau
THE BAHAMAS

Appendix B – Trail User Survey

2008 Trail Users Survey

Survey ID#: ____________
Date: ____
Start Time: _________ **Stop Time:** ___________
Location: __________________________________

Q1. Where did you start on the trail?
____

Q2. Will you be/have you been on the trail for successive days?
Yes__________ ***(Record Number)***............ 1 **^^Q22**
No 2

Q3. What form of transportation did you use to get to the trail today?
Bike.. 1
Car/truck/van (personal) 2
Car/truck/van (friends/family) 3
Group tour bus 4
Private shuttle service 5
Public transportation (bus, taxi, etc.) 6
Walked 7
Other________________________............ 8

Q4. Where are you ending on the trail?
____

Q5. How far did you travel, **ONE WAY**, to come to the trail?
(Record Number) ...... ________ Miles

Q6. How often, on average, do you use the trail?
Once a week or more often 1
Several times a month 2
Several times a year 3
Once a year 4
This is my first time .... 5 **Skip to Q7**

Q6a. What days of the week do you typically visit the trail?
(Select all that apply)
Monday-Thursday..................................... 1
Friday.. 2
Saturday 3
Sunday 4

Q6b. What time(s) of year do you typically visit the trail?
(Select all that apply)
Spring.. 1
Summer... 2
Fall 3
Winter 4
Don't know/No pattern 5

Q7. Gender: ***(Record by observation)***
Male 1
Female... 2

Q8. Which of the following best identifies your age group?
(Read List)
16-24...1
25-34...2
35-44...3
45-54...4
55-64...5
65+...6

Q9. What is your zip/postal code? _______________

Q10. How many persons were in your group today?
Just myself ....1 **Skip to Q12b**
Other_______**(Record Number)** 2

Q11. What type of group are you traveling with?
Personal group of friends/family 1
Packaged trip (commercial).......................2
Packaged trip (private)..............................3
Fundraising trip..4
Other________________ 5

Q12a. How many persons in your group are in the following age categories? ***(Record Number)***

Under 10 ______	35-44 _____
10-15 _____	45-54 _____
16-24 _____	55-64 _____
25-34 _____	65 or older_____

Q12b. How many trips will each person in your group make to the trail this calendar year? ***(Record Number)***

You ______	Person 4_____
Person 1_____	Person 5_____
Person 2_____	Person 6_____
Person 3_____	Person 7_____

Q13. What did you/your group do on the trail today?
(Select all that apply)
Bike...1
Hike/Walk..2
Jogging/Running..3
Fishing 4
Birding/Bird Watching 5
Other_______________________ 6

Q13a. How many persons in your group brought their own recreational equipment/gear?.................____________

Q13b. How many persons in your group rented their equipment/gear? ____________

Q14. What was your/your group's primary reason for using the trail today? ***(Read List only if necessary)***
Commuting 1
Fitness training (marathon, triathlon) 2
Health and exercise...................................3
Recreation 4
Other________________________ 5

Q15. Have you/your group, or do you/your group plan to, purchase or rent equipment, food, clothing, souvenirs, etc., in the communities along the trail or trailhead today?

Yes 1
No .... 2 **Skip to Q16**

Q15a. What do you estimate **your** total spending will be in the communities today on…..? ***(If with group ask to exclude)***

Beverages.. $______
Clothing .... $______
Candy/snacks .... $______
Daily Equipment rental (bikes, etc.) .... $______
Ice Cream.. $______
Restaurants.. $______
Souvenirs .... $______
Transportation (shuttling, taxi, etc.).......... $______
Other (sunscreen, film, etc.)..................... $______
Individual Package Cost .... $______

(i.e., if package cost is $800 for food, lodging, and equipment, do not input $ for those categories)

Q15b. What do you estimate **your group's** total spending will be in the communities today on….? ***(Don't ask if alone)***

Beverages.. $______
Clothing .... $______
Candy/snacks .... $______
Equipment rental (bikes, canoes, etc.) ...... $______
Ice Cream.. $______
Restaurants.. $______
Souvenirs .... $______
Transportation (shuttling, taxi, etc.).......... $______
Other (sunscreen, film, etc.)..................... $______
Estimated group package cost................... $______

(If unknown or can't estimate, SKIP group package cost)

Q16. In conjunction with your trip, have or will you plan an overnight stay?

Yes 1
No .... 2 **Skip to Q17**

Q16a. In what type of accommodation do you plan on staying?

Bed and Breakfast..................................... 1
Campground.. 2
Friend or Relatives Home .... 3 **Skip to Q17**
Motel/Hotel... 4
Other_________________________............ 5

Q16b. How much do you plan to spend for your overnight accommodations *(per night)* ? .... $_________

Q16c. How many overnight stays have you/do you plan to have in conjunction with your visit to the trail?

Tonight only.. 1
Two or more.. 2
Not sure... 3
Other_____________________________...... 4

Q17. How did you originally hear or find out about the trail? ***(Select all that apply and Record media source)***

Word of mouth (friends, family, etc.)......................... 01
Bike/Recreation Shop or Store 02
Driving past/Roadside sign.. 03
Internet search ________________________________.. 04
Internet web site ________________________________. 05
Live by the trail.. 06
Magazine ________________________________.. 07
Newspaper ________________________________.. 08
Other ____________________________________. 09
Don't recall/don't know... 10

Q18. Which category best describes your total household income before taxes? ***(Read List)***

Less than $25K 1
$25K to $50K 2
$51K to $100K 3
$101K to $150K 4
$151K to $200K 5
More than $200K.......................................6
Refused ***(Don't read)***.................................7

Q19. How would you rate your overall experience on the trail today? ***(Read List)***

Excellent 1 ****Q22**
Very good 2 ****Q22**
Good 3 ****Q22**
Fair..4
Poor...5
Don't know ***(Don't read)***..........................6

Q20. What else about the <u>trail itself</u> could make your experience better?

____
____
____

Q21. What else about the <u>trail communities</u> could make your experience better?

____
____
____

Q22. Additional comments?

*****Note:** If trail user provided at least a **good** rating for <u>overall experience</u> (Q19) then ask for reason why?*

*^^**Note:** If respondent(s) is on a multiple day trip record how they arrived at and are planning to return to their original departure point.*

____
____
____
____
____

THANK YOU!!

Appendix C –Supplemental Survey

07-294 Progress Fund - Supplemental Sample Survey (10/3/08)

Q17. How did you originally hear or find out about the trail? ***(Select all that apply and Record media source)***

- Word of mouth (friends, family, etc.) 01
- Bike/Recreation Shop or Store.................................... 02
- Driving past/Roadside sign 03
- Internet search ______________________________ .. 04
- Internet web site ______________________________ . 05
- Live by the trail.. 06
- Magazine ___________________________________ .. 07
- Newspaper __________________________________ .. 08
- Other ______________________________________ . 09
- Don't recall/don't know... 10

QS1. After your inquiry online, did you visit the trail this season?

- Yes 1
- No..2 **SKIP TO QS5**

VISITORS

QS2. Aside from your visit to the trail, what additional activities and/or attractions did you visit in Southwestern Pennsylvania/Northern Maryland region this season?

QS3. Where you asked to complete a survey while visiting the trail?

- Yes 1
- No..2 **SKIP TO Q1**

QS4. Did you complete that survey?

- Yes ....1 **SKIP TO END**
- No..2 **SKIP TO Q1**

NON-VISITORS

QS5 For what reasons did you decide to not visit the trail after your online inquiry?

QS6 How likely are you to consider using/visiting the trail in the future?

- Extremely likely..........................5 **SKIP TO QS8**
- Somewhat likely..........................4 **SKIP TO QS8**
- Neither likely nor unlikely 3
- Not likely 2
- Not at all likely............................1
- Don't know 6

QS7 Why are you not likely to consider using/visiting the trail in the future?

QS8. Did you still visit other destinations in the Southwestern Pennsylvania/Northern Maryland region this season?

Yes 1
No...2 **SKIP TO QS9b**

QS9a. What activities and/or attractions did you visit in Southwestern Pennsylvania/Northern Maryland region this season?

GO TO QA

QS9b. What other destinations, attractions, and/or activities did you ultimately choose instead of visiting the Southwestern Pennsylvania/Northern Maryland region?

GO TO QA

2008 Supplemental Sample Survey

****ONLY ASK QA-Q6b if RESPONDENT HAD VISITED THE TRAIL AFTER INQUIRY**

QA. Date/Month of visit: ___________________________________

(USE DROP DOWN LISTS FOR THE ABOVE QUESTIONS)

Q1. Where did you start on the trail the day that you visited?

____

Q2. For this trip, were you on the trail for successive days?

Yes__________ ***(Record Number)***............ 1 **^^Q22**
No 2

Q3. What form of transportation did you use to get to the trail that day?

Bike... 1
Car/truck/van (personal) 2
Car/truck/van (friends/family) 3
Group tour bus 4
Private shuttle service 5
Public transportation (bus, taxi, etc.) 6
Walked 7
Other_______________________............ 8

Q4. Where did you end on the trail that day?

____

Q5. How far did you travel, **ONE WAY**, to come to the trail that day? ***(Record Number)*** _______ Miles

Q6. How often, on average, do you use the trail?

Once a week or more often 1
Several times a month 2
Several times a year 3
Once a year 4
This was my first time.............................. 5 **Skip to Q7**

Q6a. What days of the week do you typically visit the trail? ***(Select all that apply)***

Monday-Thursday.................................... 1
Friday... 2
Saturday 3
Sunday 4

Q6b. What time(s) of year do you typically visit the trail? ***(Select all that apply)***

Spring... 1
Summer.. 2
Fall 3
Winter 4
Don't know/No pattern 5

****ASK Q10 for BOTH Visitors and Non-Visitors**

Q10. How many persons were in your group that day?

Just myself .... 1 **Skip to Q12b**
Other_______**(*Record Number*)** 2

(ONLY DISPLAY FOLLOWING for Non-Visitors)

Did not participate in any alternative
activities/ visit any other destinations this season...3

****ONLY ASK Q11-Q14 if RESPONDENT HAD VISITED THE TRAIL AFTER INQUIRY**

Q11. What type of group did you travel with that day?
- Personal group of friends/family............... 1
- Packaged trip (commercial) 2
- Packaged trip (private).............................. 3
- Fundraising trip.. 4
- Other_________________.......................... 5

Q12a. How many persons were in your group from the following age categories? ***(Record Number)***

Under 10 ______	35-44 _____
10-15 _____	45-54 _____
16-24 _____	55-64 _____
25-34 _____	65 or older_____

Q12b. How many trips did each person in your group make to the trail this calendar year? ***(Record Number)***

You ______	Person 4_____
Person 1_____	Person 5_____
Person 2_____	Person 6_____
Person 3_____	Person 7_____

Q13. What did you/your group do on the trail that day?
(Select all that apply)
- Bike.. 1
- Hike/Walk... 2
- Jogging/Running....................................... 3
- Fishing 4
- Birding/Bird Watching.............................. 5
- Other_________________________............ 6

Q13a. How many persons in your group brought their own recreational equipment/gear? ____________

Q13b. How many persons in your group rented their equipment/gear? ____________

Q14. What was your/your group's primary reason for using the trail that day?
- Commuting 1
- Fitness training (marathon, triathlon)........ 2
- Health and exercise 3
- Recreation 4
- Other__________________________.......... 5

****ASK THE REMAINDER OF THE QUESTIONS to BOTH Visitors and Non-Visitors**
(When viewing the survey online you will notice select verbiage changes for the Non-Visitor segment)

Q15. Did you/your group, purchase or rent equipment, food, clothing, souvenirs, etc., in the communities along the trail or trailhead that day?

Yes 1
No .... 2 **Skip to Q16**

Q15a. What do you estimate **your** total spending was in the communities on the following items the day you visited the trail? ***(If with group ask to exclude)***

Beverages.. $______
Clothing .... $______
Candy/snacks .... $______
Daily Equipment rental (bikes, etc.) .... $______
Ice Cream.. $______
Restaurants.. $______
Souvenirs .... $______
Transportation (shuttling, taxi, etc.).......... $______
Other (sunscreen, film, etc.)..................... $______
Individual Package Cost .... $______

(i.e., if package cost is $800 for food, lodging, and equipment, do not input $ for those categories)

Q15b. What do you estimate **your group's** spending was in the communities on the following items the day you visited the trail? ***(Don't ask if alone)***

Beverages.. $______
Clothing .... $______
Candy/snacks .... $______
Equipment rental (bikes, canoes, etc.) ...... $______
Ice Cream.. $______
Restaurants.. $______
Souvenirs .... $______
Transportation (shuttling, taxi, etc.).......... $______
Other (sunscreen, film, etc.)..................... $______
Estimated group package cost.................. $______

(If unknown or can't estimate, SKIP group package cost)

Q16. In conjunction with your trip, did you have an overnight stay?

Yes 1
No .... 2 **Skip to Q19**

Q16a. In what type of accommodation did you stay?

Bed and Breakfast 1
Campground... 2
Friend or Relatives Home .... 3 **Skip to Q19**
Motel/Hotel 4
Other________________________............ 5

Q16b. How much do did you spend on your overnight accommodations *(per night)* ? $________

Q16c. How many overnight stays did you plan in conjunction with your visit to the trail?

Tonight only... 1
Two or more... 2
Not sure... 3
Other___________________________...... 4

Q19. How would you rate your overall experience on the trail that day?

Excellent 1 ****Q22**
Very good 2 ****Q22**
Good 3 ****Q22**
Fair.. 4
Poor.. 5
Don't know 6

Q20. What else about the trail itself could have made your experience better?

____
____

Q21. What else about the trail communities could have made your experience better?

____
____

Q22(a&b). Additional comments?

a**Note: *If trail user provided at least a* ***good*** *rating for overall experience (Q19) then ask for reason why?*

b^^Note: *If respondent(s) is on a multiple day trip record how they arrived at and are planning to return to their original departure point.*

____
____

Q7. Gender:

Male 1
Female.. 2

Q8. Which of the following best identifies your age group? **(NOT REQUIRED)**

16-24.. 1
25-34.. 2
35-44.. 3
45-54.. 4
55-64.. 5
65+... 6

Q9. What is your zip/postal code? _______________

Q18. Which category best describes your total household income before taxes? **(NOT REQUIRED)**

Less than $25K 1
$25K to $50K.. 2
$51K to $100K.. 3
$101K to $150K.. 4
$151K to $200K.. 5
More than $200K 6

THANK YOU!!

Phase III: Trail Town Business Study (2009)

Table of Contents

Background and Methodology

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Background and Objectives

The Progress Fund's Trail Town Program, Laurel Highlands Visitors Bureau (LHVB), and the 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 (completed in 2008)
- Phase II, marketing research among trail users (conducted throughout 2008 and reported in 2009)
- Phase III, follow-up economic impact research among businesses

Phase I was undertaken to update data from a 1998 economic impact study. However, the previous study was conducted at a time when the trail was not yet completed. Thus, this report will focus on comparisons between Phase I and Phase III of this overall study.

Similar to Phase I, the Phase III report highlights 2008 Economic Impact Research which was aimed to address the following objectives:

- To obtain gross sales revenue from trail-side and trail-related businesses for 2007 and 2008.
- 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 made minor revisions to the survey instrument used in Phase I with input and approval from the Trail Town Program, LHVB, and ATA.

Similar to Phase I, Phase III utilized a multimodal data collection methodology (mail, web, and telephone interviews).

Approximately 329 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 email of they could complete and return the survey via mail or fax.

Data collection took place between March 30, 2009 and May 28, 2009. The survey took approximately 8 minutes to complete online and averaged 10.5 minutes to complete via phone.

Overall, businesses were surveyed as follows:

	Phase I	Phase III
Mail/fax	58	64
Online	30	20
Phone	29	36
Total Completes	**117**	**120**

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

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

Analytical Notes

- For the Phase III study, the total sample size of 120 yielded results with a statistical accuracy of ±7.14% at the 95% confidence level. This means that there is a one in twenty (20) chance that the "true" measurement will fall outside of this range.
- Where appropriate, subgroup analysis was conducted to determine significant differences by *business type*, *county location*, and between the Phase I and Phase III findings.
- 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.

Key Findings

Key Findings

Overview

- In 2008, despite the tough economic times, it was projected that trail users had contributed $40,677,299 in receipts to the businesses operating on or around the trail and those businesses paid their employees $7,500,798 in wages to accommodate trail generated business.
  - These figures represented a 20% increase in receipts and 16% increase in wages compared to the levels projected in 2007 ($32,614,703 and $6,273,927; respectively).
- Among those businesses that were surveyed in Phase III, total calculated receipts attributed to trail user spending were $11,887,505 and these trail businesses stimulated their local economies by putting $2,293,234 worth of wages back into the surrounding communities through their employee's wages.
- On average, business owners indicated that approximately one-quarter (23.3%) of their gross revenue could be attributed to trail users and two thirds (66.4%) reported that they experienced at least some increase in gross revenue because of their proximity to the trail.
- Nearly one-quarter of the business owners mentioned that they have or plan to expand their operations within the next year because of the impact they felt from the trail.
  - Expansions/additions to facilities and/or services were mentioned most often among outdoor/trail related businesses and restaurants.
- Regardless of business type, the most frequently mentioned types of expansions/additions to facilities and/or services included:
  - Increasing advertising efforts (in publications and along the trail)
  - Offering shuttle service for customers
  - Providing bike parking/accommodations
  - Increasing staff

Conclusions and Recommendations

Reinforcing the findings from the previous year, Phase III respondents' consistently mentioned that their overall perceptions of the trail system were quite favorable and the once again the majority of them mentioned that the trail is having a positive economic impact on their respective business.

Just as the Phase I sample was an improvement over the one used in 1998, the Phase III sample was once again slightly more representative of the businesses located on or along the trail.

First, Phase III businesses were more forthcoming with revenue information:

- Over two-thirds of them provided their most recent gross revenue figures and/or the percentage of their gross revenue that was attributable to the trail compared to less than half who provided these figures in Phase I.

Next, on average, the size of the businesses that completed the Phase III survey was smaller compared to Phase I:

- Phase III respondents reported staffing only about one-third of the number of full-time employees and approximately half as many part-time employees as Phase I; suggesting a larger representation of those small businesses that comprise the majority of the commerce being conducted along the trail.

Ultimately, the differences in the composition of the Phase III sample, particularly the larger representation of small businesses such as bed & breakfasts, led to much lower estimated average revenue totals and fewer businesses indicating plans of expansion to their facilities/services and/or increasing their staff compared to Phase I.

- However, the Phase I and Phase III samples remained similar in composition in regards to their proportion of business types, average years of operation, reported peak/off-peak sales months, and the average number of hours worked by employees.

Key Findings

See Appendix D at the end of the report for a detailed model of the receipt calculation.

Surprisingly, despite the tough economic times, when adjusting for those businesses included in the sample universe that did not respond, the 2008 calculated receipts ($40,677,299) increased 20% from 2007 ($32,614,703) and wages for 2008 ($7,500,798) increased 16% compared to 2007 ($6,273,927).

- It is very important to note that these projections were made by grouping all of the businesses surveyed according to business type and using those calculated* averages to estimate the results of those businesses that did not respond.
- This assumes that the total number of businesses included in the original contact lists that did not respond have receipt and wage totals that are similar to the receipt and wage totals of similar types of businesses that did respond.
- Therefore, because the projected averages for receipts and wages are based on relatively small samples these projections can only be used to estimate the total business activity along the trail.

The undeniable display of positive economic influence that was demonstrated by the findings in the previous phase was confirmed once again in 2008. Overall, respondents reported a slight increase in estimated gross revenue from 2007 to 2008 (4.6%) and excluding retail, slight to significant increases were reported among each of the remaining business types.

- Increases in receipts were most dramatic among lodging/hotel establishments (22.7%) and outdoor/trail related businesses (20.4%).

See Appendix D at the end of the report for a detailed model of the receipt calculation.

Furthermore, considering the average wage expenditure used in receipt calculation*, the 2008 businesses are stimulating local economies by putting $2,293,234 worth of wages back into the surrounding trail communities through their employees.

Similar to 2007, respondents indicated that approximately one-quarter (23.3%) of their gross revenue could be attributed to trail users and two-thirds (66.4%) reported that they experienced at least some increase in gross revenue because of their proximity to the trail. Not surprisingly, although slightly lower than 2007, over half (51.7%) of the 2008 respondents reported that the trail had at least some influence on their choice of a viable location for their business.

The trail's positive impact was not only displayed through trends in revenue and reported influence on choosing a location, although slightly lower than the level observed in Phase I, nearly one-quarter (23.3%) of the Phase III respondents reported that they have or plan to expand their operations within the next year because of impact felt from the trail.

- Similar to Phase I, this figure was again driven primarily by outdoor/trail related businesses (37.5%) and restaurants (32.4%).

Moreover, Phase III respondents mentioned investing more heavily in advertising (specifically in publications and/or by actually placing signs on the trail), offering shuttle services for customers, providing bike parking accommodations (such as bike racks/storages/garages) and increasing their 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 dong so with such great proficiency that it is motivating them to expand their current list of operations and obligations.

In order to attract additional business to the trail towns and/or encourage currents businesses to further embrace the trail system and its possibilities, it would be beneficial to increase the level at which such success is promoted. The list of possible techniques that could be utilized to accomplish this goal is numerous, but at an absolute minimum testimonial should be included in any trail books/magazines or be posted on relevant websites/message boards.

In order to reinforce and continually track the positive impact that the trail is having on the businesses and communities located along the Great Allegheny Passage, we recommend repeating both the Trail Business and the Trail User Study every year.

As was stated in the Phase I report, 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.

Based on the success in enhancing the representativeness of the trail business contact list that was achieved between Phase I and Phase III, we highly recommend that representatives of sponsoring organizations maintain or elevate their current level of engagement. Targeting not only trail businesses themselves, but also outdoor/recreational partnerships/groups and trail communities as a whole.

Detailed Report

While the 1998 study was collected within a similar geographic footprint, the Phase I and Phase III studies were administered to a larger and broader audience using a slightly more extensive survey instrument. Additionally, in 1998 the trail system and the towns through which it passed were not yet fully developed, translating into fewer directly affected businesses to contribute to the sample.

Therefore, this report will primarily focus on comparisons between the Phase I and Phase III findings.

Comparative Analysis – Phase III Business Study (2008 receipts)

This summary will present findings in several key areas:

- Gross sales/revenue and trail attributed revenue percentage
- Calculated wages and receipts
- Perceived economic impact
- Trail influence

Gross Sales/Revenue Trail Attributed Revenue Percentage

In Phase III, about two-thirds of the respondents estimated their **gross revenue** figures for the last two years (69.2%, 2007; 65.0%, 2008), compared to less than half in the previous phase (41.0%, 2006; 47.9%, 2007).

Among the Phase III sample, the average 2008 revenue figures reported were slightly higher than those reported for 2007 ($461,015 and $440,661, respectively). Although based on small base sizes, substantial fluctuations in **gross revenue** were reported within several subgroups:

- Average **gross revenue** from 2007 to 2008 <u>increased</u> by:
  - 22.7% among lodging/hotel establishments
  - 20.4% among outdoor/trail related businesses
  - 24.8% among businesses located in Westmoreland County, PA
  - 10.5% among businesses located in Allegheny County, PA

See the tables on the following page.

Average Estimated Gross Revenue by Business Type

	Phase III	Phase III - Business Type				
		Lodging	Restaurant	Retail	Outdoor/ Trail Business	Other
Bases:	*78-83*	*30*-31**	*19*-22**	*18**	*7*-8**	*4**
2007 gross revenue	$463,070	$256,807	$360,635	$956,951	$413,857	$556,000
2008 gross revenue	$482,457	$315,080	$381,010	$857,057	$498,286	$506,250
% difference	*4.2%*	*22.7%*	*5.6%*	*-10.4%*	*20.4%*	*-8.9%*

***Caution: small base sizes**

Average Estimated Gross Revenue by County

	Phase III	Phase III - County				
		Allegheny, PA	West-moreland, PA	Fayette, PA	Somerset, PA	Allegany, MD
Bases:	*78-83*	*6*-8**	*3*-4**	*18*-19**	*30**	*21*-22**
2007 gross revenue	$463,070	$748,167	$883,900	$756,365	$252,588	$402,666
2008 gross revenue	$482,457	$826,833	$1,103,333	$722,739	$260,321	$406,748
% difference	*4.2%*	*10.5%*	*24.8%*	*-4.4%*	*3.1%*	*1.0%*

***Caution: small base sizes**

- In Phase I, the average **gross revenues** estimated by businesses for the two previous years ($771,522; 2006 and $773,310; 2007 – *not shown in the above tables*) were much higher than those reported by businesses in Phase III ($440,662; 2007 and $461,015; 2008). However, this was most likely a direct result of more "small businesses" not only participating but providing financial information compared to last year (displayed vividly by the Average Number of Employees charts in the Research Results section and also in Appendix E – Respondent Profile).

Although based on small sample sizes, it was observed that several subgroup categories reported increases in the percentage difference between estimated **gross revenues** from the previous to the current year compared to the findings of the previous phase:

- 20.4% among lodging/hotel establishments (2.3%; 2007 and 22.7%; 2008)
- 10.0% among businesses located in Allegheny County, PA (1.5%; 2007 and 10.5%; 2008)
- 7.2% among businesses located in Westmoreland County, PA (17.6%; 2007 and 24.8%; 2008)
- 6.9% among businesses located in Allegany County, MD (-5.9%; 2007 and 1.0%; 2008)

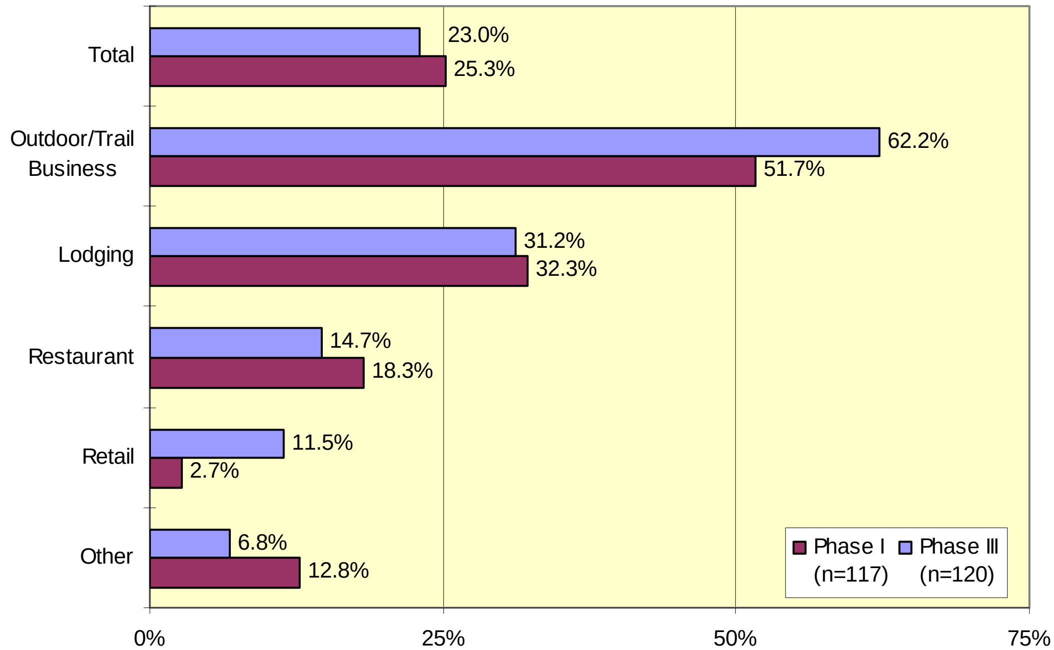
Trail Attributed Revenue Percentage

Similar to the previous phase (25.3%), the economic contribution of trail users was substantial. On average, respondents estimated that nearly one-quarter (23.0%) of the business that they received in 2008 could be directly attributed to the existence of the area's biking/hiking trail.

- The largest percentage estimates, regarding the attributable contributions of trail users to 2008 annual business, were observed among:
  - Outdoor/trail related businesses (62.2%)
  - Lodging/hotel establishments (31.2%)
  - Businesses located in Fayette County, PA (30.0%) *(not displayed in the following graph)*
  - Businesses located in Somerset County, PA (25.5%) *(not displayed in the following graph)*
  - Businesses located in Allegany County, MD (20.6%) *(not displayed in the following graph)*

See the graph on the following page.

Trail Attributed Revenue Percentage



Calculated Wages and Receipts

In the 1998 Economic impact study, researchers determined the amount of total sales (receipts) that a business received from trail users by performing a calculation that included variables such as number of employees, hours worked per week, and percentage of annual income attributed to the trail. The calculation was also performed using averages, derived from U.S. Bureau of Labor Statistics data, for employee wages and the ratio of earned revenue to such wages within a particular industry.*

**See Appendix D at the end of the report for a detailed model of the receipt calculation.*

- New figures on average wage have not been released by the US Bureau of Labor Statistics over the past year. Therefore, the same wage estimations used in Phase I were also used to perform calculations in Phase III.
- The trail's influence on businesses was once again apparent as increases in both receipts and wages were observed among:
  - Retail/convenience/grocery stores
  - Outdoor/trail related businesses
  - Lodging/hotel establishments

See the table on the following page.

Average Wages/Receipts Attributed to the Trail by Type

	Business Type							
	Retail		Restaurant		Outdoor/Sporting Goods		Lodging	
	Phase I	Phase III	Phase I	Phase III	Phase I	Phase III	Phase I	Phase III
Bases:	***19****	***26****	***18****	***33****	***18****	***6****	***27****	***34****
Wages (avg.)	$4,206	$15,189	$20,251	$16,433	$26,810	$37,271	$13,954	$32,795
Receipts (avg.)	$42,363	$152,998	$71,233	$57,801	$270,046	$375,423	$46,597	$109,516
Percentage (est.)	***10%***		***28%***		***10%***		***30%***	

***Caution: small base sizes--only businesses providing both complete employee data and reported some amount of revenue attributable to the trail were included when calculating average wages.**

See Appendix D at the end of the report for a detailed model of the receipt calculation.

As mentioned in the Phase I report, the Campos Inc designed s asked businesses to estimate their gross annual revenue for the recent year and the percentage of that revenue that they felt could be attributed to the trail. This affords us the opportunity to make a comparison between a business's **perceptions of their sales/revenue** against their **actual performance** (calculated receipts*****).

- Across all counties, the amount of revenue that business's perceived to be directly attributable to the trail was lower than their actual performance (calculated receipts) among both Phase I and Phase III respondents.
  - Since the percentage of their revenue that businesses believe can be directly attributed to the trail is a common factor in both calculations the difference could either be a result of businesses incorrectly reporting the number of employees they staff/employee hours and/or businesses underestimating estimating their gross revenue for the most recent year.
- Compared to Phase I, an increase in wages, calculated receipts and attributable revenue was observed in Phase III among most counties excluding Somerset County, PA (where decreases were observed for each), Westmoreland County, PA (where a slight decrease was observed in calculated receipts), and Allegheny County, PA (where a slight decrease was observed in attributable revenue).

See the table on the following page.

Average Wages/Receipts Attributed to the Trail by County

	Wages		Receipts		Revenue x % attributed to trail	
County	Phase I	Phase III	Phase I	Phase III	Phase I	Phase III
Allegheny, PA	$37,358	$174,150	$219,887	$658,686	$33,277	$17,067
Westmoreland, PA	$27,502	$59,236	$226,180	$209,299	$81,783	$107,950
Fayette, PA	$88,001	$144,012	$658,600	$1,175,167	$47,222	$78,833
Somerset, PA	$128,971	$35,552	$877,391	$283,833	$113,881	$39,641
Allegany, MD	$56,188	$105,906	$366,202	$596,303	$38,940	$45,380
Unable to Categorize	$804,800	n/a	$4,243,302	n/a	$66,724	n/a
Totals*	**$2,078,956**	**$2,293,234**	**$11,990,990**	**$11,887,506**	**$2,804,013**	**$4,441,266**

****Note: sum of ONLY the businesses that provided necessary employee and/or revenue information***

- It is very important that we reiterate the fact that these figures are based on small sample sizes and are extremely susceptible to being skewed by one or more uncharacteristically large or small values.
  - Therefore, regardless of how large, differences observed between years may be a direct result of variations in the sizes of the businesses surveyed and not an indication of a decrease in revenue for that particular region.

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.

The positive impact of the trail that was observed in 2007 was reinforced again in 2008 as two-thirds (66.4%) of the total respondents reported that their sales/revenue had *increased at least somewhat* as a direct result of the trail.

See the table on the following page.

- The majority of 2008 respondents from the following subgroups each mentioned experiencing *at least somewhat of an increase* in sales/revenue.
  - Outdoor/trail related businesses (100.0%)
  - Lodging/hotel establishments (74.4%)
  - Restaurants (67.6%)
  - Businesses located in Fayette County, PA (83.3%) *(not shown in the following table)*
  - Businesses located in Somerset County, PA (79.5%) *(not shown in the following table)*
  - Businesses located in Allegany County, MD (63.0%) *(not shown in the following table)*
- Phase III business owners from the following subgroups responded neutrally, each reporting that the trail *has had no impact* on their sales/ revenue over the past year.
  - Businesses located in Allegheny County, PA (76.9%) *(not shown in the following table)*
  - Businesses located in Westmoreland County, PA (57.1%) *(not shown in the following table)*

Perceived Economic Impact of Trail

			Phase III - Business Type				
	Phase I	Phase III	Lodging	Rest-aurant	Retail	Outdoor/ Trail Business	Other
Bases:	***101***	***110***	***39****	***34****	***26****	***7****	***4****
Increased revenue significantly or somewhat	64.4%	66.4%	74.4%	67.6%	42.3%	100.0%	75.0%
Decreased revenue significantly or somewhat	0.0%	1.8%	0.0%	0.0%	7.7%	0.0%	0.0%
Has had no impact	35.6%	31.8%	25.6%	32.4%	50.0%	0.0%	25.0%

***Caution: small base sizes**

Trail Influence

One of the earliest and most vital decisions an owner must make when starting a business is choosing a viable location.

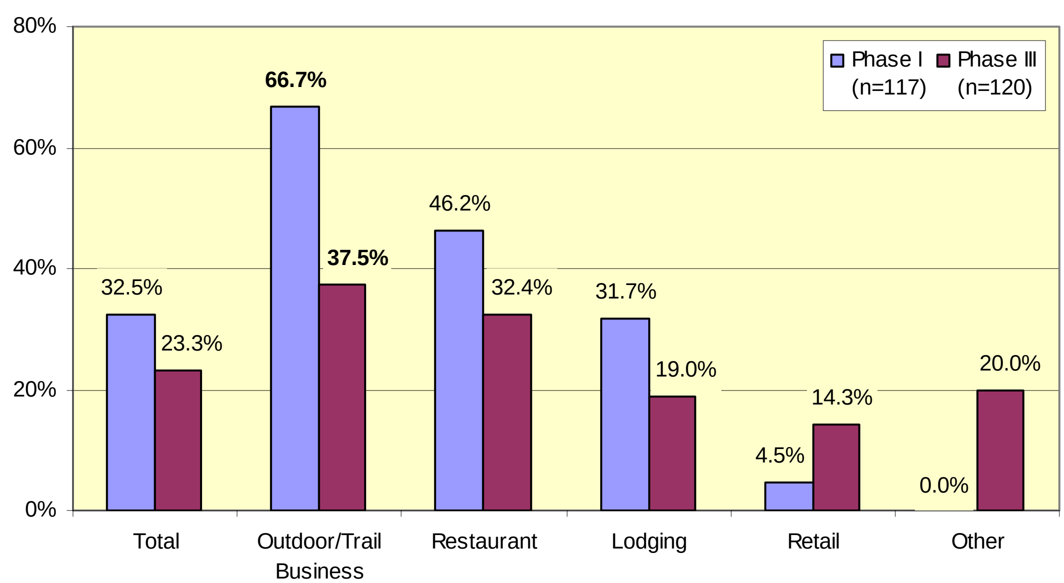
Despite decreasing slightly from the level observed in Phase I (64.4%), the trail still proved to be very influential with over half (51.7%) of the Phase III respondents crediting the trail with having *at least some influence* on the location of their business.

- Similar to last year, the vast majority of the outdoor/trail related businesses cited that the trail system had *at least some influence* on the location of their businesses (84.6%, Phase I and 87.5%, Phase III).
- Although not quite as strong, at least four in ten respondents from each of the other business types also mentioned that the trail system had *at least some influence* on the location of their businesses.

Nearly one-quarter (23.3%) of the Phase III respondents reported that the existence and proximity of the trail influenced them to make *expansions/additions* to their *products, services,* and/or *facilities;* this was slightly lower than the level observed in Phase I (32.4%).

- Compared to the previous phase, the only business type that did <u>not</u> experience a substantial decrease in Phase III was retail/gift/specialty stores (4.5%, 2007 and 14.3%, 2008).
- Outdoor/trail-related businesses (37.5%) were once again the most likely to report expansions/additions; however, in Phase III restaurants (32.4%) were a very close second.

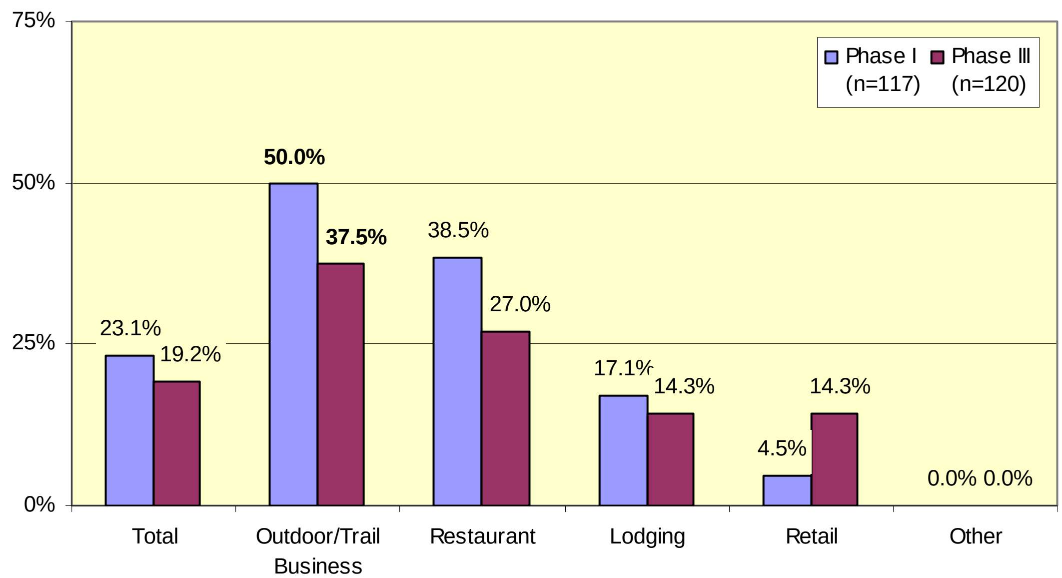
Trail Influenced Expansions/Additions



- The vast majority (96.4%) of the Phase III respondents that had reported expanding or making plans to expand current operations were *focusing on their current business locations*, which was comparable to the previous phase (92.1%).
- Slightly more than one-quarter (26.7%) of the Phase III respondents reported investing in additional *advertising*, primarily by *placing ads in publications/trail books* and/or *placing signs on the trail* (10.0% and 5.8%, respectively).
- One in five (20.8%) mentioned *making/planning to make additions/ modifications to services*; offering a *shuttle service* to patrons was mentioned most frequently (9.2%).
- Approximately one in ten (10.8%) mentioned *expanding/improving facilities*, mainly by providing patrons with *convenient equipment/facilities to park or store their bicycles* (4.2%).

One in five (19.2%) Phase III respondents reported creating new staff positions because of the influence they receive from their proximity to the trail, this was comparable to the previous phase (23.1%).

Trail Influenced Staffing Changes



Research Graphs and Tables

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

Note: *Q1 was asked of all respondents.*

Type of Business

	Phase I	Phase III
Bases:	***117***	***120***
(Net) Lodging	35.0%	35.0%
-Hotel/motel/B&B	*25.6%*	*27.5%*
-Campgrounds	*7.7%*	*6.7%*
Restaurant/tavern/café/ice cream shop	22.2%	31.7%
(Net) Retail	18.8%	23.3%
-Retail/gift/specialty store	*11.1%*	*11.7%*
-Convenience/grocery store	*6.8%*	*9.2%*
(Net) Outdoor/Trail related businesses	15.4%	8.3%
-Bike rental/sales/supplies	*7.7%*	*4.2%*
-Outdoor recreation/outfitter	*6.8%*	*4.2%*
(Net) Attractions	6.0%	0.8%

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

Note: *Q2 was asked of all respondents.*

Age of Business

			Phase III - Business Type				
	Phase I	Phase III	Lodging	Rest-aurant	Retail	Outdoor/ Trail Business	Other
Bases:	***117***	***120***	***42****	***37****	***28****	***8****	***5****
Less than a year	2.6%	3.3%	0.0%	2.7%	10.7%	0.0%	0.0%
1-2 years	14.5%	14.2%	14.3%	18.9%	10.7%	12.5%	0.0%
3-5 years	13.7%	16.7%	11.9%	24.3%	7.1%	25.0%	40.0%
6-10 years	17.9%	23.3%	33.3%	27.0%	10.7%	12.5%	0.0%
11-20 years	24.8%	16.7%	19.0%	16.2%	14.3%	0.0%	40.0%
21-40 years	12.0%	15.8%	11.9%	0.0%	35.7%	37.5%	20.0%
More than 40 years	13.7%	10.0%	9.5%	10.8%	10.7%	12.5%	0.0%
Not applicable	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mean (years)	*18.6*	*22.7*	*19.1*	*15.0*	*20.5*	*20.1*	*12.6*

***Caution: small base sizes**

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

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.*

			Phase III - Business Type				
	Phase I	Phase III	Lodging	Rest-aurant	Retail	Outdoor/ Trail Business	Other
Bases:	*117*	*120*	*42**	*37**	*28**	*8**	*5**
(Net) Spring	**53.0%**	**53.3%**	**52.4%**	**48.6%**	**50.0%**	**75.0%**	**80.0%**
-March	12.8%	8.3%	7.1%	2.7%	14.3%	12.5%	20.0%
-April	29.9%	20.0%	14.3%	16.2%	28.6%	25.0%	40.0%
-May	47.0%	50.0%	47.6%	48.6%	42.9%	75.0%	80.0%
(Net) Summer	**87.2%**	**89.2%**	**90.5%**	**91.9%**	**82.1%**	**100.0%**	**80.0%**
-June	80.3%	74.2%	73.8%	75.7%	64.3%	100.0%	80.0%
-July	81.2%	84.2%	83.3%	89.2%	75.0%	100.0%	80.0%
-August	78.6%	79.2%	78.6%	86.5%	67.9%	87.5%	80.0%
(Net) Fall	**62.4%**	**64.2%**	**76.2%**	**51.4%**	**64.3%**	**50.0%**	**80.0%**
-September	54.7%	55.0%	66.7%	43.2%	53.6%	50.0%	60.0%
-October	47.9%	52.5%	64.3%	40.5%	50.0%	37.5%	80.0%
-November	17.1%	20.0%	11.9%	16.2%	32.1%	12.5%	60.0%
(Net) Winter	**18.8%**	**20.8%**	**14.3%**	**18.9%**	**35.7%**	**0.0%**	**40.0%**
-December	15.4%	17.5%	4.8%	18.9%	35.7%	0.0%	40.0%
-January	6.8%	9.2%	9.5%	0.0%	21.4%	0.0%	20.0%
-February	7.7%	9.2%	11.9%	0.0%	17.9%	0.0%	20.0%

***Caution: small base sizes**

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

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.*

			Phase III - Business Type				
	Phase I	Phase III	Lodging	Rest-aurant	Retail	Outdoor/ Trail Business	Other
Bases:	***117***	***120***	***42****	***37****	***28****	***8****	***5****
(Net) Spring	**67.5%**	**60.8%**	**64.3%**	**62.2%**	**50.0%**	**62.5%**	**80.0%**
-March	*57.3%*	*52.5%*	*57.1%*	*56.8%*	*35.7%*	*50.0%*	*80.0%*
-April	*32.5%*	*31.7%*	*42.9%*	*29.7%*	*14.3%*	*50.0%*	*20.0%*
-May	*18.8%*	*11.7%*	*11.9%*	*10.8%*	*14.3%*	*12.5%*	*0.0%*
(Net) Summer	**10.3%**	**10.8%**	**4.8%**	**10.8%**	**25.0%**	**0.0%**	**0.0%**
-June	*6.8%*	*6.7%*	*2.4%*	*5.4%*	*17.9%*	*0.0%*	*0.0%*
-July	*6.0%*	*4.2%*	*2.4%*	*8.1%*	*3.6%*	*0.0%*	*0.0%*
-August	*5.1%*	*5.0%*	*4.8%*	*2.7%*	*10.7%*	*0.0%*	*0.0%*
(Net) Fall	**55.6%**	**50.8%**	**57.1%**	**54.1%**	**32.1%**	**87.5%**	**20.0%**
-September	*10.3%*	*10.0%*	*7.1%*	*16.2%*	*3.6%*	*25.0%*	*0.0%*
-October	*19.7%*	*16.7%*	*16.7%*	*16.2%*	*10.7%*	*37.5%*	*20.0%*
-November	*48.7%*	*44.2%*	*54.8%*	*45.9%*	*25.0%*	*62.5%*	*20.0%*
(Net) Winter	**81.2%**	**80.0%**	**81.0%**	**89.2%**	**67.9%**	**75.0%**	**80.0%**
-December	*58.1%*	*54.2%*	*78.6%*	*51.4%*	*21.4%*	*62.5%*	*40.0%*
-January	*78.6%*	*74.2%*	*78.6%*	*81.1%*	*60.7%*	*62.5%*	*80.0%*
-February	*72.6%*	*73.3%*	*71.4%*	*89.2%*	*60.7%*	*50.0%*	*80.0%*

***Caution: small base sizes**

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

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:

Phase I Total=117

Phase III Total=120

*Lodging=42**

*Restaurant=37**

*Retail=28**

*Outdoor/Trail Business=8**

*Other=5**

***Caution: small base sizes**

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.*

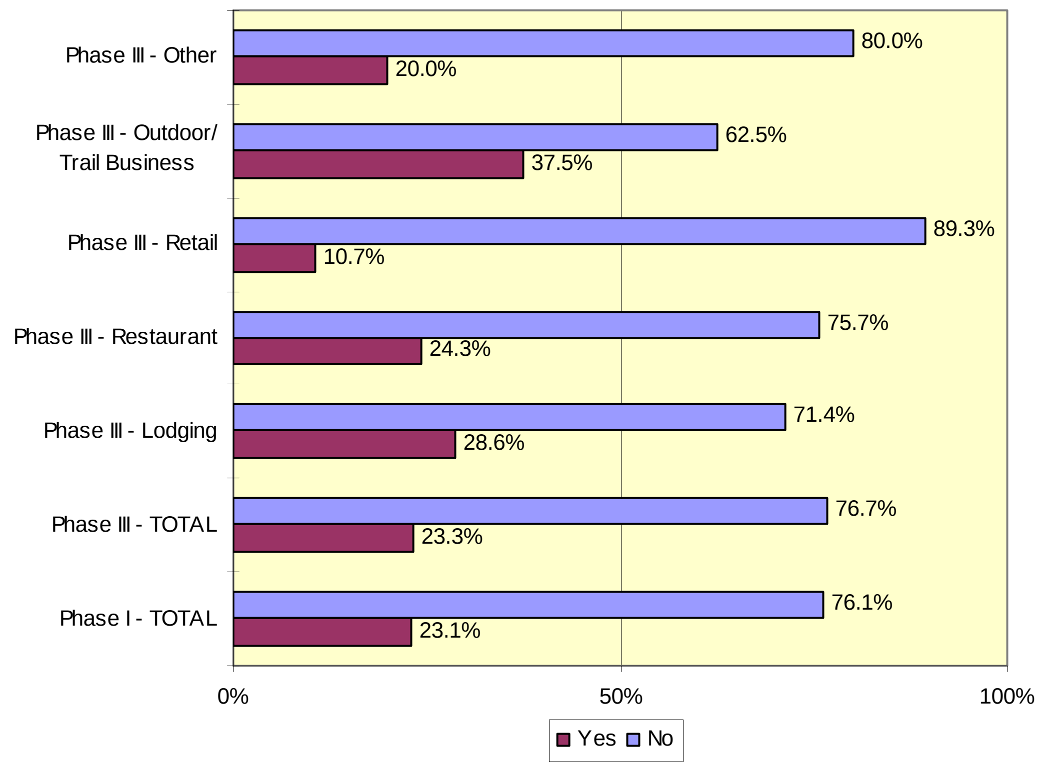
Bases:

*Phase I Total=27**

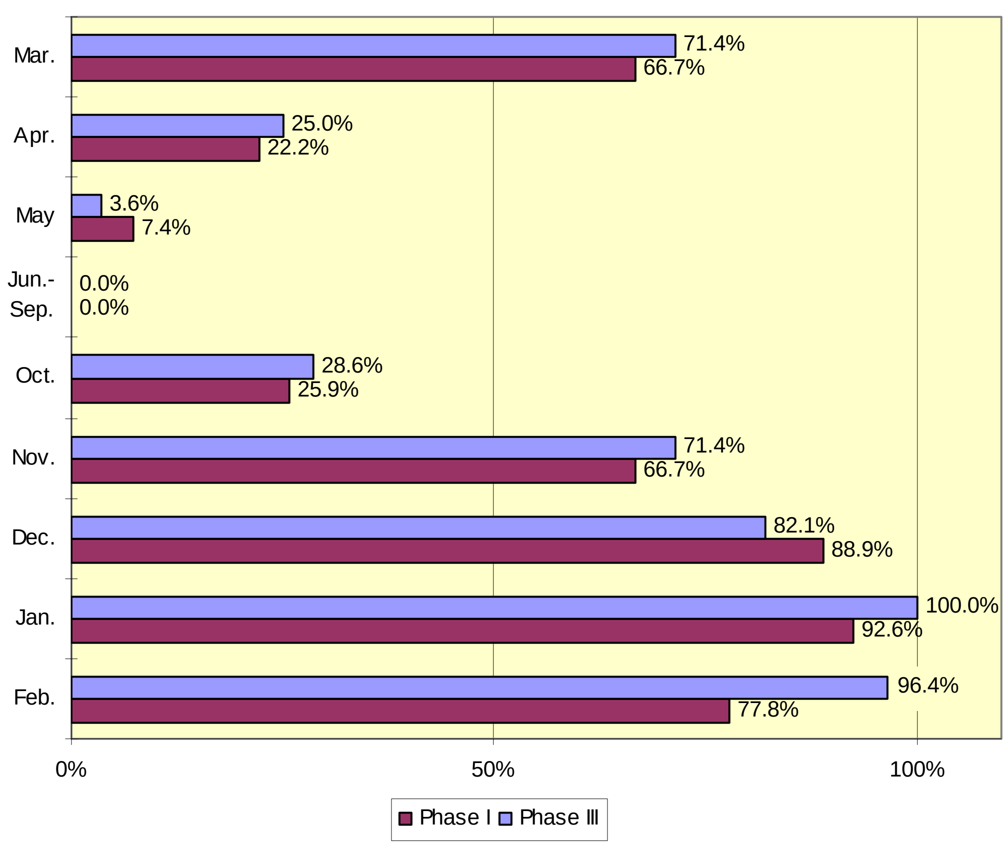
*Phase III Total=28**

***Caution: small base sizes**

Seasonal Closing



Months Closed



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.*

Full-Time Employees – Peak Season

	Phase I	Phase III	Phase III - Business Type: Lodging	Rest-aurant	Retail	Outdoor/ Trail Business	Other
Bases:	*117*	*120*	*42**	*37**	*28**	*8**	*5**
1 to 5 people	47.9%	57.5%	73.8%	45.9%	57.1%	50.0%	20.0%
6 to 10 people	13.7%	10.0%	4.8%	16.2%	10.7%	0.0%	20.0%
11 to 25 people	13.7%	9.2%	4.8%	8.1%	17.9%	0.0%	20.0%
More than 25 people	8.5%	5.0%	2.4%	10.8%	0.0%	12.5%	0.0%
Not applicable	16.2%	18.3%	11.9%	18.9%	14.3%	25.0%	20.0%
Mean	*23.7*	*7.6*	*3.9*	*12.2*	*6.0*	*15.2*	*7.7*

****Caution: small base sizes***

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

Q#4a2

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

Note: *Q4a2 was asked of all respondents.*

Part-Time Employees – Peak Season

	Phase I	Phase III	Phase III - Business Type: Lodging	Rest-aurant	Retail	Outdoor/ Trail Business	Other
Bases:	*117*	*120*	*42**	*37**	*28**	*8**	*5**
1 to 5 people	40.2%	45.8%	40.5%	43.2%	57.1%	50.0%	40.0%
6 to 10 people	16.2%	11.7%	2.4%	18.9%	21.4%	0.0%	0.0%
11 to 25 people	10.3%	10.0%	11.9%	13.5%	0.0%	0.0%	40.0%
More than 25 people	7.7%	6.7%	2.4%	10.8%	3.6%	25.0%	0.0%
Not applicable	25.6%	25.8%	40.5%	13.5%	14.3%	12.5%	20.0%
Mean	*20.5*	*10.3*	*8.2*	*11.8*	*6.0*	*26.0*	*11.0*

****Caution: small base sizes***

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

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.*

Full-Time Employees – Off-Peak Season

			Phase III - Business Type				
	Phase I	Phase III	Lodging	Rest-aurant	Retail	Outdoor/ Trail Business	Other
Bases:	*117*	*120*	*42**	*37**	*28**	*8**	*5**
1 to 5 people	49.6%	56.7%	66.7%	48.6%	57.1%	50.0%	40.0%
6 to 10 people	11.1%	10.8%	7.1%	13.5%	14.3%	12.5%	0.0%
11 to 25 people	9.4%	5.0%	2.4%	0.0%	14.3%	0.0%	20.0%
More than 25 people	5.1%	4.2%	2.4%	10.8%	0.0%	0.0%	0.0%
Not applicable	24.8%	23.3%	19.0%	27.0%	14.3%	25.0%	20.0%
Mean	*15.1*	*6.3*	*3.8*	*10.7*	*5.5*	*2.4*	*6.7*

****Caution: small base sizes***

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

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.*

Part-Time Employees – Off-Peak Season

			Phase III - Business Type				
	Phase I	Phase III	Lodging	Rest-aurant	Retail	Outdoor/ Trail Business	Other
Bases:	*117*	*120*	*42**	*37**	*28**	*8**	*5**
1 to 5 people	37.6%	37.5%	26.2%	32.4%	50.0%	50.0%	80.0%
6 to 10 people	7.7%	12.5%	9.5%	18.9%	14.3%	0.0%	0.0%
11 to 25 people	6.8%	5.8%	7.1%	8.1%	0.0%	12.5%	0.0%
More than 25 people	3.4%	3.3%	0.0%	8.1%	3.6%	0.0%	0.0%
Not applicable	44.4%	40.8%	54.8%	32.4%	28.6%	25.0%	20.0%
Mean	*12.3*	*7.4*	*6.1*	*10.8*	*6.3*	*3.8*	*1.3*

****Caution: small base sizes***

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

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 Full-Time Hours – Peak Season

			Phase III - Business Type				
	Phase I	Phase III	Lodging	Rest-aurant	Retail	Outdoor/ Trail Business	Other
Bases:	*117*	*120*	*42**	*37**	*28**	*8**	*5**
15 hours or less	0.9%	4.2%	11.9%	0.0%	0.0%	0.0%	0.0%
16 to 30 hours	6.0%	8.3%	7.1%	10.8%	7.1%	12.5%	0.0%
31 to 40 hours	51.3%	48.3%	33.3%	54.1%	67.9%	37.5%	40.0%
More than 40 hours	21.4%	17.5%	23.8%	13.5%	10.7%	25.0%	20.0%
Not applicable/Refused	20.5%	21.7%	23.8%	21.6%	14.3%	25.0%	40.0%
Mean	*44.2*	*39.9*	*39.0*	*39.0*	*40.3*	*44.3*	*44.3*

****Caution: small base sizes***

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

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.*

Average Part-time Hours – Peak Season

			Phase III - Business Type				
	Phase I	Phase III	Lodging	Rest-aurant	Retail	Outdoor/ Trail Business	Other
Bases:	*117*	*120*	*42**	*37**	*28**	*8**	*5**
15 hours or less	13.7%	18.3%	14.3%	10.8%	21.4%	37.5%	60.0%
16 to 30 hours	53.8%	48.3%	40.5%	67.6%	42.9%	37.5%	20.0%
31 to 40 hours	6.0%	5.0%	2.4%	5.4%	10.7%	0.0%	0.0%
More than 40 hours	0.9%	1.7%	2.4%	0.0%	3.6%	0.0%	0.0%
Not applicable/Refused	25.6%	26.7%	40.5%	16.2%	21.4%	25.0%	20.0%
Mean	*23.1*	*21.4*	*21.2*	*23.6*	*22.1*	*13.8*	*10.5*

****Caution: small base sizes***

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

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 Full-Time Hours – Off-Peak Season

			Phase III - Business Type				
	Phase I	Phase III	Lodging	Rest-aurant	Retail	Outdoor/ Trail Business	Other
Bases:	*117*	*120*	*42**	*37**	*28**	*8**	*5**
15 hours or less	5.8%	5.8%	16.7%	0.0%	0.0%	0.0%	0.0%
16 to 30 hours	9.4%	15.0%	16.7%	16.2%	14.3%	12.5%	0.0%
31 to 40 hours	51.3%	40.8%	26.2%	43.2%	60.7%	37.5%	40.0%
More than 40 hours	6.0%	10.8%	9.5%	8.1%	10.7%	25.0%	20.0%
Not applicable/Refused	29.9%	27.5%	31.0%	32.4%	14.3%	25.0%	40.0%
Mean	*37.0*	*35.7*	*30.3*	*36.6*	*38.8*	*41.8*	*44.3*

***Caution: small base sizes**

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

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.*

Average Part-time Hours – Off-Peak Season

			Phase III - Business Type				
	Phase I	Phase III	Lodging	Rest-aurant	Retail	Outdoor/ Trail Business	Other
Bases:	*117*	*120*	*42**	*37**	*28**	*8**	*5**
15 hours or less	18.8%	25.8%	31.0%	16.2%	17.9%	50.0%	60.0%
16 to 30 hours	32.5%	30.0%	16.7%	43.2%	35.7%	25.0%	20.0%
31 to 40 hours	4.3%	1.7%	0.0%	2.7%	3.6%	0.0%	0.0%
More than 40 hours	0.0%	0.8%	0.0%	0.0%	3.6%	0.0%	0.0%
Not applicable/Refused	44.4%	41.7%	52.4%	37.8%	39.3%	25.0%	20.0%
Mean	*19.3*	*17.9*	*13.0*	*21.8*	*22.2*	*11.0*	*11.8*

***Caution: small base sizes**

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

Q#6
What impact did the trail have on the location of your business?

Note: *Q6 was asked of all respondents.*

Influence of Trail on Location of Business

	Phase I	Phase III	Phase III - Business Type: Lodging	Rest-aurant	Retail	Outdoor/ Trail Business	Other
Bases:	***117***	***120***	***42****	***37****	***28****	***8****	***5****
(Net) Some influence	**62.4%**	**51.7%**	**47.6%**	**54.1%**	**46.4%**	**87.5%**	**40.0%**
-Very strong influence	*23.1%*	*20.8%*	*31.0%*	*10.8%*	*7.1%*	*75.0%*	*0.0%*
-Strong influence	*12.0%*	*9.2%*	*7.1%*	*10.8%*	*10.7%*	*0.0%*	*20.0%*
-Some influence	*27.4%*	*21.7%*	*9.5%*	*32.4%*	*28.6%*	*12.5%*	*20.0%*
No influence	37.6%	48.3%	52.4%	45.9%	53.6%	12.5%	60.0%

***Caution: small base sizes**

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

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.*

Impact of Trail on Business in Past Year

	Phase I	Phase III	Phase III - Business Type: Lodging	Rest-aurant	Retail	Outdoor/ Trail Business	Other
Bases:	***101***	***110***	***39****	***34****	***26****	***7****	***4****
Increased revenue significantly	17.8%	19.1%	30.8%	8.8%	7.7%	57.1%	0.0%
Increased revenue somewhat	46.5%	47.3%	43.6%	58.8%	34.6%	42.9%	75.0%
Top-two box	***64.4%***	***66.4%***	***74.4%***	***67.6%***	***42.3%***	***100.0%***	***75.0%***
Decreased revenue somewhat	0.0%	1.8%	0.0%	0.0%	7.7%	0.0%	0.0%
Decreased revenue significantly	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Has had no impact	35.6%	31.8%	25.6%	32.4%	50.0%	0.0%	25.0%

***Caution: small base sizes**

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

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.*

			Phase III - Business Type				
	Phase I	Phase III	Lodging	Rest-aurant	Retail	Outdoor/ Trail Business	Other
Bases:	***117***	***120***	***42****	***37****	***28****	***8****	***5****
Expand operations in the past year	16.2%	8.3%	7.1%	10.8%	7.1%	12.5%	0.0%
Make plans to expand operations	16.2%	15.0%	11.9%	21.6%	7.1%	25.0%	20.0%
Top-two box	***32.5%***	***23.3%***	***19.0%***	***32.4%***	***14.3%***	***37.5%***	***20.0%***
Downsize operations in the past year	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Make plans to downsize operations	0.0%	0.8%	0.0%	0.0%	3.6%	0.0%	0.0%
None	65.8%	75.8%	81.0%	67.6%	82.1%	62.5%	80.0%

***Caution: small base sizes**

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.*

			Phase III - Business Type				
	Phase I	Phase III	Lodging	Rest-aurant	Retail	Outdoor/ Trail Business	Other
Bases:	***38****	***28****	***8****	***12****	***4****	***3****	***1****
At your current business location	92.1%	96.4%	87.5%	100.0%	100.0%	100.0%	100.0%
At another location of the trail system	0.0%	7.1%	12.5%	0.0%	25.0%	0.0%	0.0%
At a location not part of the trail system	2.6%	3.6%	0.0%	0.0%	0.0%	33.3%	0.0%
Open a new shop (not specified)	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
No answer given	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

***Caution: small base sizes**

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.*

Impact of Trail on Workforce Decisions

			Phase III - Business Type				
	Phase I	Phase III	Lodging	Rest-aurant	Retail	Outdoor/ Trail Business	Other
Bases:	***117***	***120***	***42****	***37****	***28****	***8****	***5****
Create new positions in the past year	10.3%	5.8%	4.8%	8.1%	3.6%	12.5%	0.0%
Make plans to create new positions	12.8%	13.3%	9.5%	18.9%	10.7%	25.0%	0.0%
Top-two box	***23.1%***	***19.2%***	***14.3%***	***27.0%***	***14.3%***	***37.5%***	***0.0%***
Eliminate positions in the past year	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Make plans to eliminate positions	1.7%	0.8%	0.0%	0.0%	3.6%	0.0%	0.0%
None	74.4%	80.0%	85.7%	73.0%	82.1%	62.5%	100.0%

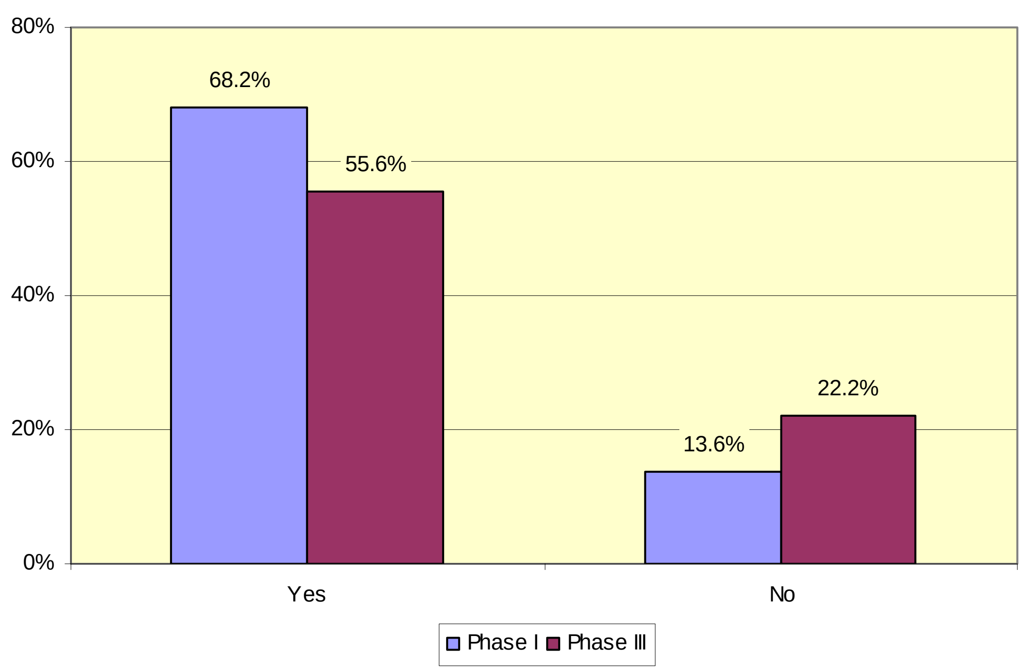
Caution: small base sizes

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:
*Phase I Total =22**
*Phase III Total =18**
Caution: small base sizes

Shipping Services Offered



Q#10.1
Approximately what were the gross revenue figures for this business location in 2007?

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

Estimated Gross Revenue in 2007 – Business Type

		Phase III - Business Type				
	Phase III	Lodging	Rest-aurant	Retail	Outdoor/ Trail Business	Other
Bases:	*120*	*42**	*37**	*28**	*8**	*5**
Not in business	7.5%	2.4%	13.5%	7.1%	12.5%	0.0%
Less than $50K	25.0%	47.6%	16.2%	0.0%	25.0%	40.0%
$50K to $149K	10.0%	11.9%	5.4%	14.3%	12.5%	0.0%
$150K to $249K	5.8%	2.4%	5.4%	7.1%	25.0%	0.0%
More than $250K	20.8%	9.5%	18.9%	35.7%	25.0%	40.0%
Refused/don't know	30.8%	26.2%	40.5%	35.7%	0.0%	20.0%
Mean (dollars)	*$463,070*	*$256,807*	*$360,635*	*$956,951*	*$413,857*	*$556,000*

Caution: small base sizes

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

Q#10.1
Approximately what were the gross revenue figures for this business location in 2007?

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

Estimated Gross Revenue in 2007 – County

		Phase III - Business Type				
	Phase III	Allegheny, PA	Westmore-land, PA	Fayette, PA	Somerset, PA	Allegany, MD
Bases:	*120*	*16**	*7**	*26**	*40**	*31**
Not in business	7.5%	12.5%	14.3%	15.4%	2.5%	3.2%
Less than $50K	25.0%	12.5%	0.0%	11.5%	52.5%	12.9%
$50K to $149K	10.0%	12.5%	0.0%	7.7%	7.5%	16.1%
$150K to $249K	5.8%	6.2%	14.3%	7.7%	0.0%	9.7%
More than $250K	20.8%	6.2%	28.6%	30.8%	12.5%	29.0%
Refused/don't know	30.8%	50.0%	42.9%	26.9%	25.0%	29.0%
Mean (dollars)	*$463,070*	*$748,167*	*$883,900*	*$756,365*	*$252,588*	*$402,666*

Caution: small base sizes

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

Q#10.2
Approximately what were the gross revenue figures for this business location in 2008?

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

Estimated Gross Revenue in 2008 – Business Type

	Phase III	Phase III - Business Type				
		Lodging	Rest-aurant	Retail	Outdoor/ Trail Business	Other
Bases:	*120*	*42**	*37**	*28**	*8**	*5**
Less than $50K	25.0%	42.9%	18.9%	7.1%	12.5%	40.0%
$50K to $149K	12.5%	14.3%	8.1%	17.9%	12.5%	0.0%
$150K to $249K	5.0%	2.4%	2.7%	7.1%	25.0%	0.0%
More than $250K	22.5%	11.9%	21.6%	32.1%	37.5%	40.0%
Refused/don't know	35.0%	28.6%	48.6%	35.7%	12.5%	20.0%
Mean	*$482,457*	*$315,080*	*$381,010*	*$857,057*	*$498,286*	*$506,250*

****Caution: small base sizes***

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

Q#10.2
Approximately what were the gross revenue figures for this business location in 2008?

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

Estimated Gross Revenue in 2008 – County

	Phase III	Phase III - Business Type				
		Allegheny, PA	Westmore-land, PA	Fayette, PA	Somerset, PA	Allegany, MD
Bases:	*120*	*16**	*7**	*26**	*40**	*31**
Less than $50K	25.0%	12.5%	0.0%	15.4%	52.5%	9.7%
$50K to $149K	12.5%	6.2%	14.3%	15.4%	10.0%	16.1%
$150K to $249K	5.0%	12.5%	0.0%	3.8%	0.0%	9.7%
More than $250K	22.5%	6.2%	28.6%	34.6%	12.5%	32.3%
Refused/don't know	35.0%	62.5%	57.1%	30.8%	25.0%	32.3%
Mean	*$482,457*	*$826,833*	*$1,103,333*	*$722,739*	*$260,321*	*$406,748*

****Caution: small base sizes***

Estimated Percentage of Trail Attributed Revenue – Business Type

Q#11
What percent of your 2008 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. Refused and don't know responses were removed from the base when calculating the mean.*

		Phase III - Business Type				
	Phase III	Lodging	Rest-aurant	Retail	Outdoor/ Trail Business	Other
Bases:	*120*	*42**	*37**	*28**	*8**	*5**
None	19.2%	16.7%	18.9%	28.6%	0.0%	20.0%
Less than 5%	18.3%	14.3%	21.6%	21.4%	12.5%	20.0%
5% to 10%	16.7%	16.7%	16.2%	17.9%	12.5%	20.0%
11% to 50%	24.2%	21.4%	32.4%	21.4%	12.5%	20.0%
51% to 100%	15.8%	28.6%	2.7%	3.6%	62.5%	0.0%
Refused/don't know	5.8%	2.4%	8.1%	7.1%	0.0%	20.0%
Mean (percentage)	*23.0%*	*31.2%*	*14.7%*	*11.5%*	*62.2%*	*6.8%*

***Caution: small base sizes**

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

Estimated Percentage of Trail Attributed Revenue – County

Q#11
What percent of your 2008 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. Refused and don't know responses were removed from the base when calculating the mean.*

		Phase III - Business Type				
	Phase III	Allegheny, PA	Westmore-land, PA	Fayette, PA	Somerset, PA	Allegany, MD
Bases:	*120*	*16**	*7**	*26**	*40**	*31**
None	19.2%	37.5%	42.9%	3.8%	12.5%	25.8%
Less than 5%	18.3%	37.5%	14.3%	19.2%	12.5%	16.1%
5% to 10%	16.7%	6.2%	0.0%	19.2%	17.5%	22.6%
11% to 50%	24.2%	0.0%	14.3%	34.6%	37.5%	12.9%
51% to 100%	15.8%	18.8%	0.0%	15.4%	15.0%	19.4%
Refused/don't know	5.8%	0.0%	28.6%	7.7%	5.0%	3.2%
Mean (percentage)	*23.0%*	*16.4%*	*6.2%*	*30.0%*	*25.5%*	*20.6%*

***Caution: small base sizes**

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

Q#12a
What is your ZIP code?

Note: *Q12a was asked of all respondents.*

ZIP Code – County

			Phase III - Business Type				
	Phase I	Phase III	Lodging	Rest-aurant	Retail	Outdoor / Trail Busines	Other
Bases:	***117***	***120***	***42****	***37****	***28****	***8****	***5****
Allegheny County,PA	17.9%	13.3%	9.5%	16.2%	17.9%	12.5%	0.0%
Westmoreland County,PA	8.5%	5.8%	0.0%	8.1%	14.3%	0.0%	0.0%
Fayette County,PA	14.5%	21.7%	19.0%	24.3%	17.9%	37.5%	20.0%
Somerset County,PA	15.4%	33.3%	47.6%	29.7%	21.4%	12.5%	40.0%
Allegany County,MD	17.1%	25.8%	23.8%	21.6%	28.6%	37.5%	40.0%
Unable to Categorize	26.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

***Caution: small base sizes**

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

Q#12a
What is your ZIP code?

Note: *Q12a was asked of all respondents.*

ZIP Code – Trail Towns

			Phase III - Business Type				
	Phase I	Phase III	Lodging	Rest-aurant	Retail	Outdoor/ Trail Business	Other
Bases:	***117***	***120***	***42****	***37****	***28****	***8****	***5****
West Newton,PA	6.0%	5.0%	0.0%	8.1%	10.7%	0.0%	0.0%
Connellsville,PA	1.7%	5.0%	0.0%	8.1%	7.1%	12.5%	0.0%
Ohiopyle,PA	6.0%	11.7%	9.5%	13.5%	10.7%	25.0%	0.0%
Rockwood,PA	4.3%	11.7%	21.4%	10.8%	3.6%	0.0%	0.0%
Confluence,PA	8.5%	14.2%	16.7%	5.4%	17.9%	12.5%	40.0%
Meyersdale,PA	1.7%	3.3%	0.0%	10.8%	0.0%	0.0%	0.0%
Frostburg,MD	8.5%	10.8%	11.9%	8.1%	17.9%	0.0%	0.0%
Cumberland,MD	6.0%	14.2%	9.5%	13.5%	10.7%	37.5%	40.0%
Other/Refused	57.3%	24.2%	31.0%	21.6%	21.4%	12.5%	20.0%

***Caution: small base sizes**

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

Actions Taken to Attract and/or Cater to Trail Users

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

Note: *Q13d was asked of all respondents.*

			Phase III - Business Type				
	Phase I	Phase III	Lodging	Rest-aurant	Retail	Outdoor / Trail Busines	Other
Bases:	*117*	*120*	*42**	*37**	*28**	*8**	*5**
(Net) Advertising/sponsorship	**33.3%**	**26.7%**	**31.0%**	**27.0%**	**21.4%**	**25.0%**	**20.0%**
-Placed ads in publications/TrailBook	*15.4%*	*10.0%*	*14.3%*	*13.5%*	*0.0%*	*12.5%*	*0.0%*
-Signs on trail	*7.7%*	*5.8%*	*0.0%*	*13.5%*	*7.1%*	*0.0%*	*0.0%*
-Developed/revised/expanded web site	*0.0%*	*4.2%*	*9.5%*	*2.7%*	*0.0%*	*0.0%*	*0.0%*
-Advertise on the internet/ATA web site	*6.0%*	*0.8%*	*2.4%*	*0.0%*	*0.0%*	*0.0%*	*0.0%*
(Net) Additional/modified services	**41.0%**	**20.8%**	**33.3%**	**18.9%**	**14.3%**	**0.0%**	**0.0%**
-Shuttle service	*11.1%*	*9.2%*	*23.8%*	*2.7%*	*0.0%*	*0.0%*	*0.0%*
-Bike repairs/mechanics/shop	*6.0%*	*2.5%*	*2.4%*	*5.4%*	*0.0%*	*0.0%*	*0.0%*
-Bike rentals	*6.0%*	*0.8%*	*0.0%*	*0.0%*	*3.6%*	*0.0%*	*0.0%*
(Net) Expand/improve facilities	**31.6%**	**10.8%**	**7.1%**	**18.9%**	**7.1%**	**12.5%**	**0.0%**
-Garage/bike storage/bike racks	*6.8%*	*4.2%*	*2.4%*	*10.8%*	*0.0%*	*0.0%*	*0.0%*
(Net) Community involvement	**1.7%**	**1.7%**	**0.0%**	**2.7%**	**3.6%**	**0.0%**	**0.0%**
Nothing	11.1%	20.0%	14.3%	21.6%	25.0%	0.0%	60.0%

***Caution: small base sizes**

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

Appendix A – Business Survey

Trail Town Business Survey

1. What is the primary classification of this business location? *Circle one number.*
   - Bike rentals/repairs/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 you choosing the location of your business?
   - Very strong influence 1
   - Strong influence..................................... 2
   - Some influence 3
   - No influence... 4

7. What impact has the location of the trail system had on your business 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)*

   2007: $ ____________________________

   2008: $ ____________________________

11. What percent of your 2008 annual business would you estimate could be largely attributable to the existence of the area's biking/hiking trail? *(Round to nearest percentage)*

   ____________________________ **%**

OVER →

(Answer question 11a if your business is a bike store)

11a. What percent of your 2008 annual revenue would you estimate was generated through:

(Round to nearest percentages)

Rentals:_______ Repairs: _______ Sales: _________ Supplies: ________

(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.gaptrailsurvey2009.campos.com**, 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 – County Comparison Tables

All Counties

	2008	2007	1998
Bases:	***120***	***117***	***89***
Business Location			
Allegheny County, PA	13%	17%	30%
Westmoreland County, PA	6%	9%	12%
Fayette County, PA	22%	15%	24%
Somerset County, PA	33%	15%	26%
Allegany County, MD	25%	17%	0%
Other	0%	27%	8%
Type of Business			
Lodging	35%	35%	13%
Restaurant/tavern/café/ice cream shop	32%	22%	37%
Retail	23%	19%	28%
Outdoor/Trail related businesses	8%	15%	17%
Other	2%	9%	34%
Age of Business			
Less than a year	3%	3%	10%
1-2 years	14%	15%	19%
3-5 years	17%	14%	21%
6-10 years	23%	18%	7%
11-20 years	17%	25%	18%
21-40 years	16%	12%	11%
More than 40 years	10%	14%	13%
Trail Influence on Location			
Very strong influence	21%	23%	13%
Strong influence	9%	12%	9%
Some infuence	22%	27%	16%
No influence	48%	38%	60%
Peak Season			
Bike season	92%	88%	85%
Winter months	21%	19%	26%
Summer months	21%	29%	45%
Year round	0%	2%	18%
Off-peak Season			
Winter months	76%	81%	59%
Spring months	38%	37%	22%
Summer months	9%	7%	6%
None	5%	3%	0%

All Counties

	2008	2007	1998
Bases:	***120***	***117***	***89***
Percent Business from Trail			
None	19%	16%	15%
Less than 5%	18%	23%	27%
5% to 10%	17%	10%	22%
11% to 50%	24%	16%	22%
51% to 100%	16%	19%	11%
Peak Season - Number of Employees			
1-5 person	48%	44%	39%
6-10 people	16%	15%	30%
11-25 people	14%	23%	11%
More than 25	17%	15%	8%
Off-peak Season - Number of Employees			
1-5 person	44%	49%	43%
6-10 people	20%	15%	17%
11-25 people	13%	13%	4%
More than 25	9%	10%	9%
Peak Season - Work Hours per Week			
15 hours or less	9%	3%	9%
16 to 30 hours	42%	39%	15%
31 to 40 hours	28%	39%	40%
More than 40 hours	10%	11%	13%
Off-peak Season - Work Hours per Week			
15 hours or less	15%	6%	12%
16 to 30 hours	38%	37%	18%
31 to 40 hours	22%	33%	26%
More than 40 hours	4%	3%	8%
Plans to Expand			
Yes	23%	33%	44%
No	77%	68%	55%
Impact of Completion (2008) / *Estimated Impact if Comleted (1999)* **			
Increased revenue significantly / *Extremely positive*	19%	18%	*28%*
Increased revenue somewhat / *Positive*	47%	47%	*46%*
Has had no impact / *No impact*	32%	36%	*21%*
Decreased revenue somewhat / *Negative*	2%	0%	*1%*
Decreased revenue significantly / *Extremely negative*	0%	0%	*2%*

*****Note: Questions was changed in response to the completion of the trail***

Allegheny County, PA

	2008	2007	1998
Bases:	***16****	***21****	***27****
Type of Business			
Lodging	25%	29%	7%
Restaurant/tavern/café/ice cream shop	38%	10%	41%
Retail	31%	29%	22%
Outdoor/Trail related businesses	6%	14%	19%
Other	0%	18%	41%
Age of Business			
Less than a year	6%	0%	15%
1-2 years	13%	14%	15%
3-5 years	13%	19%	30%
6-10 years	38%	10%	4%
11-20 years	6%	38%	11%
21-40 years	6%	0%	7%
More than 40 years	19%	19%	19%
Trail Influence on Location			
Very strong influence	19%	14%	11%
Strong influence	13%	10%	11%
Some infuence	6%	33%	11%
No influence	63%	43%	59%
Peak Season			
Bike season	81%	76%	75%
Winter months	19%	29%	37%
Summer months	44%	38%	48%
Year round	0%	0%	26%
Off-peak Season			
Winter months	56%	81%	38%
Spring months	44%	24%	11%
Summer months	6%	10%	12%
None	6%	0%	0%

Caution: small base sizes

Allegheny County, PA

	2008	2007	1998
Bases:	***16****	***21****	***27****
Percent Business from Trail			
None	38%	29%	15%
Less than 5%	38%	38%	22%
5% to 10%	6%	5%	22%
11% to 50%	0%	5%	26%
51% to 100%	19%	14%	11%
Peak Season - Number of Employees			
1-5 person	25%	33%	37%
6-10 people	6%	14%	22%
11-25 people	6%	14%	15%
More than 25	50%	33%	11%
Off-peak Season - Number of Employees			
1-5 person	25%	33%	37%
6-10 people	6%	10%	7%
11-25 people	13%	14%	4%
More than 25	44%	29%	11%
Peak Season - Work Hours per Week			
15 hours or less	0%	5%	15%
16 to 30 hours	44%	33%	7%
31 to 40 hours	38%	43%	41%
More than 40 hours	6%	14%	15%
Off-peak Season - Work Hours per Week			
15 hours or less	0%	5%	15%
16 to 30 hours	69%	38%	11%
31 to 40 hours	13%	38%	19%
More than 40 hours	6%	0%	7%
Plans to Expand			
Yes	6%	19%	44%
No	94%	81%	52%
Impact of Completion (2008) / *Estimated Impact if Comleted (1999)* **			
Increased revenue significantly / *Extremely positive*	8%	6%	*33%*
Increased revenue somewhat / *Positive*	15%	35%	*41%*
Has had no impact / *No impact*	77%	59%	*26%*
Decreased revenue somewhat / *Negative*	0%	0%	*0%*
Decreased revenue significantly / *Extremely negative*	0%	0%	*0%*

*****Note: Questions was changed in response to the completion of the trail***

****Caution: small base sizes***

Westmoreland County, PA

	2008	2007	1998
Bases:	***7****	***10****	***11****
Type of Business			
Lodging	0%	20%	0%
Restaurant/tavern/café/ice cream shop	43%	30%	36%
Retail	57%	20%	45%
Outdoor/Trail related businesses	0%	30%	9%
Other	0%	0%	10%
Age of Business			
Less than a year	0%	10%	0%
1-2 years	13%	10%	36%
3-5 years	13%	30%	9%
6-10 years	38%	20%	9%
11-20 years	6%	20%	18%
21-40 years	6%	0%	18%
More than 40 years	19%	10%	13%
Trail Influence on Location			
Very strong influence	14%	40%	9%
Strong influence	0%	10%	0%
Some infuence	14%	10%	0%
No influence	71%	40%	91%
Peak Season			
Bike season	100%	90%	36%
Winter months	43%	20%	27%
Summer months	0%	0%	36%
Year round	0%	0%	27%
Off-peak Season			
Winter months	86%	90%	45%
Spring months	43%	20%	18%
Summer months	43%	10%	0%
None	0%	0%	0%

***Caution: small base sizes**

Westmoreland County, PA

	2008	2007	1998
Bases:	***7****	***10****	***11****
Percent Business from Trail			
None	43%	10%	27%
Less than 5%	14%	20%	55%
5% to 10%	0%	0%	9%
11% to 50%	14%	10%	0%
51% to 100%	0%	40%	9%
Peak Season - Number of Employees			
1-5 person	29%	70%	64%
6-10 people	14%	10%	36%
11-25 people	14%	10%	0%
More than 25	29%	0%	0%
Off-peak Season - Number of Employees			
1-5 person	29%	50%	55%
6-10 people	14%	10%	27%
11-25 people	29%	10%	4%
More than 25	14%	10%	9%
Peak Season - Work Hours per Week			
15 hours or less	0%	10%	9%
16 to 30 hours	57%	60%	36%
31 to 40 hours	29%	20%	27%
More than 40 hours	0%	10%	18%
Off-peak Season - Work Hours per Week			
15 hours or less	0%	10%	9%
16 to 30 hours	57%	40%	27%
31 to 40 hours	14%	30%	36%
More than 40 hours	0%	0%	9%
Plans to Expand			
Yes	43%	40%	36%
No	57%	60%	64%
Impact of Completion (2008) / *Estimated Impact if Comleted (1999)* **			
Increased revenue significantly / *Extremely positive*	14%	25%	*9%*
Increased revenue somewhat / *Positive*	14%	38%	*27%*
Has had no impact / *No impact*	57%	38%	*45%*
Decreased revenue somewhat / *Negative*	14%	0%	*9%*
Decreased revenue significantly / *Extremely negative*	0%	0%	*9%*

***Note: Questions was changed in response to the completion of the trail*

**Caution: small base sizes*

Fayette County, PA

	2008	2007	1998
Bases:	***26****	***17****	***21****
Type of Business (multiple mentions were not accepted in the 2008 survey)			
Lodging	31%	35%	19%
Restaurant/tavern/café/ice cream shop	35%	12%	38%
Retail	19%	6%	24%
Outdoor/Trail related businesses	12%	29%	38%
Other	3%	18%	29%
Age of Business			
Less than a year	8%	0%	14%
1-2 years	23%	12%	29%
3-5 years	8%	12%	10%
6-10 years	12%	6%	0%
11-20 years	15%	12%	24%
21-40 years	27%	41%	19%
More than 40 years	8%	18%	5%
Trail Influence on Location			
Very strong influence	27%	18%	24%
Strong influence	8%	24%	10%
Some infuence	27%	12%	19%
No influence	39%	47%	48%
Peak Season			
Bike season	100%	100%	86%
Winter months	4%	0%	10%
Summer months	42%	59%	53%
Year round	0%	0%	10%
Off-peak Season			
Winter months	73%	71%	77%
Spring months	39%	65%	53%
Summer months	4%	6%	0%
None	8%	0%	0%

***Caution: small base sizes**

Fayette County, PA

	2008	2007	1998
Bases:	***26****	***17****	***21****
Percent Business from Trail			
None	4%	24%	19%
Less than 5%	19%	18%	14%
5% to 10%	19%	18%	33%
11% to 50%	35%	24%	14%
51% to 100%	15%	12%	14%
Peak Season - Number of Employees			
1-5 person	42%	35%	24%
6-10 people	12%	12%	33%
11-25 people	19%	35%	5%
More than 25	23%	18%	19%
Off-peak Season - Number of Employees			
1-5 person	39%	53%	24%
6-10 people	27%	24%	14%
11-25 people	12%	6%	5%
More than 25	4%	6%	19%
Peak Season - Work Hours per Week			
15 hours or less	4%	0%	5%
16 to 30 hours	35%	12%	14%
31 to 40 hours	31%	65%	48%
More than 40 hours	23%	12%	5%
Off-peak Season - Work Hours per Week			
15 hours or less	4%	0%	14%
16 to 30 hours	31%	18%	19%
31 to 40 hours	39%	47%	29%
More than 40 hours	0%	6%	0%
Plans to Expand			
Yes	31%	41%	62%
No	69%	59%	38%
Impact of Completion (2008) / *Estimated Impact if Comleted (1999)* **			
Increased revenue significantly / *Extremely positive*	33%	21%	*38%*
Increased revenue somewhat / *Positive*	50%	43%	*48%*
Has had no impact / *No impact*	17%	36%	*10%*
Decreased revenue somewhat / *Negative*	0%	0%	*0%*
Decreased revenue significantly / *Extremely negative*	0%	0%	*5%*

*****Note: Questions was changed in response to the completion of the trail***

****Caution: small base sizes***

Somerset County, PA

	2008	2007	1998
Bases:	***40****	***18****	***23****
Type of Business			
Lodging	50%	33%	26%
Restaurant/tavern/café/ice cream shop	28%	33%	35%
Retail	15%	17%	30%
Outdoor/Trail related businesses	5%	6%	0%
Other	2%	11%	39%
Age of Business			
Less than a year	0%	0%	4%
1-2 years	15%	17%	9%
3-5 years	30%	11%	26%
6-10 years	28%	28%	13%
11-20 years	13%	17%	22%
21-40 years	8%	11%	9%
More than 40 years	8%	17%	17%
Trail Influence on Location			
Very strong influence	20%	39%	4%
Strong influence	10%	17%	9%
Some infuence	23%	28%	22%
No influence	48%	17%	65%
Peak Season			
Bike season	93%	94%	86%
Winter months	20%	28%	26%
Summer months	13%	28%	35%
Year round	0%	11%	9%
Off-peak Season			
Winter months	78%	78%	77%
Spring months	40%	39%	34%
Summer months	5%	11%	13%
None	5%	11%	0%

***Caution: small base sizes**

Somerset County, PA

	2008	2007	1998
Bases:	***40****	***18****	***27****
Percent Business from Trail			
None	13%	6%	4%
Less than 5%	13%	6%	39%
5% to 10%	18%	11%	17%
11% to 50%	38%	33%	35%
51% to 100%	15%	11%	4%
Peak Season - Number of Employees			
1-5 person	68%	44%	48%
6-10 people	18%	17%	30%
11-25 people	8%	28%	13%
More than 25	0%	6%	0%
Off-peak Season - Number of Employees			
1-5 person	60%	50%	52%
6-10 people	18%	22%	26%
11-25 people	3%	11%	4%
More than 25	0%	0%	4%
Peak Season - Work Hours per Week			
15 hours or less	23%	0%	4%
16 to 30 hours	25%	39%	9%
31 to 40 hours	28%	33%	39%
More than 40 hours	8%	11%	22%
Off-peak Season - Work Hours per Week			
15 hours or less	30%	11%	4%
16 to 30 hours	23%	39%	26%
31 to 40 hours	10%	17%	22%
More than 40 hours	8%	6%	17%
Plans to Expand			
Yes	18%	39%	30%
No	83%	61%	65%
Impact of Completion (2008) / *Estimated Impact if Comleted (1999)* **			
Increased revenue significantly / *Extremely positive*	13%	19%	*26%*
Increased revenue somewhat / *Positive*	67%	69%	*48%*
Has had no impact / *No impact*	18%	13%	*22%*
Decreased revenue somewhat / *Negative*	3%	0%	*0%*
Decreased revenue significantly / *Extremely negative*	0%	0%	*0%*

****Note: Questions was changed in response to the completion of the trail***

****Caution: small base sizes***

Allegany County, MD

	2008	2007
Bases:	***31****	***20****
Type of Business		
Lodging	32%	30%
Restaurant/tavern/café/ice cream shop	29%	25%
Retail	26%	30%
Outdoor/Trail related businesses	13%	15%
Other	0%	0%
Age of Business		
Less than a year	3%	5%
1-2 years	7%	15%
3-5 years	13%	10%
6-10 years	23%	20%
11-20 years	26%	30%
21-40 years	19%	10%
More than 40 years	10%	10%
Trail Influence on Location		
Very strong influence	19%	15%
Strong influence	10%	5%
Some infuence	26%	45%
No influence	45%	35%
Peak Season		
Bike season	87%	85%
Winter months	32%	30%
Summer months	7%	25%
Year round	0%	0%
Off-peak Season		
Winter months	84%	85%
Spring months	29%	40%
Summer months	13%	5%
None	3%	0%

***Caution: small base sizes**

Allegany County, MD

	2008	2007
Bases:	***31****	***20****
Percent Business from Trail		
None	26%	15%
Less than 5%	16%	35%
5% to 10%	23%	5%
11% to 50%	13%	15%
51% to 100%	19%	20%
Peak Season - Number of Employees		
1-5 person	42%	50%
6-10 people	23%	25%
11-25 people	23%	20%
More than 25	13%	5%
Off-peak Season - Number of Employees		
1-5 person	42%	50%
6-10 people	26%	15%
11-25 people	23%	10%
More than 25	7%	5%
Peak Season - Work Hours per Week		
15 hours or less	3%	10%
16 to 30 hours	65%	45%
31 to 40 hours	23%	40%
More than 40 hours	7%	5%
Off-peak Season - Work Hours per Week		
15 hours or less	16%	5%
16 to 30 hours	45%	50%
31 to 40 hours	29%	25%
More than 40 hours	3%	0%
Plans to Expand		
Yes	29%	35%
No	71%	65%
Impact of Completion		
Increased revenue significantly / *Extremely positive*	22%	26%
Increased revenue somewhat / *Positive*	41%	47%
Has had no impact / *No impact*	37%	26%
Decreased revenue somewhat / *Negative*	0%	0%
Decreased revenue significantly / *Extremely negative*	0%	0%

***Caution: small base sizes**

Appendix C – Respondent Profile

In Phase III, all (100.0%) 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* compared to 70.0% in 2007.

Identical to Phase I, 35.0% of the Phase III respondents described their business as either a *hotel/motel/B&B* or a *campground*. Increasing slightly from Phase I, approximately three in ten mentioned operating a *restaurant/café/ice cream shop* (22.2%, Phase I and 31.7%, Phase III) and nearly one-quarter operated a *retail business/ store* (18.8%, Phase I and 23.3%, Phase III). *Outdoor/trail related businesses*, including *bike rentals/sales/supplies*, were the only business type cited slightly less often in Phase III (15.4%, Phase I and 8.3%, Phase III). The remaining 1.7% represented some *other* business type.

On average, Phase III respondents reported operating businesses at their current locations slightly longer than those in Phase I (22.7 years and 18.6 years, respectively).

- The Phase III average was influenced primarily by the majority (55.8%) of respondents that cited either *6-20 years* (40.0%) or *21-40 years* (15.8%).
- Fewer than one in five businesses each reported operating at their current locations for either *1-2 years*, *3-5 years*, or *more than 40 years* (14.2%, 16.7%, and 10.0%, respectively).

In Phase III, the analysis of peak and off-peak sales months was performed differently than it was in 1998 and Phase I. Instead of attempting to label peak and off-peak sales months by loosely fitting them into pre-determined durations of time, such as *fall to spring* or *spring to winter*, this year's analysis will simply report what portion of the businesses experience their peak and off-peak sales during the months associated with primary and most popular shopping seasons.

- The Phase I results were re-coded so that they could be compared directly against the Phase III findings.

Nearly all (91.7%) of the Phase III respondents reported that they experience the majority and/or all of their peak sales months during what is considered to be the *bike season* (April to October). Approximately one in five (20.8%) respondents each mentioned peak sales months during either *summer* (June, July and/or August) (20.8%) and/or *winter* (December, January and/or February).

- *Bike season* (88.0%) was also the most frequently selected shopping season among Phase I respondents. Three in ten (29.1%) identified months during *summer* and slightly fewer than one in five (18.8%) mentioned months during *winter*. Only two businesses (1.7%) reported experiencing peak sales *year round*.

Accordingly, Phase III businesses most frequently mentioned experiencing off-peak sales during *winter* (78.8% -- December, January and/or February). About four in ten (37.5%) respondents reported that they experience off-peak sales during *spring* (March, April and/or May) and less than one in ten (9.2%) mentioned *summer* (June, July and/or August). Only one in twenty (5.0%) reported that they did not experience any off-peak sales months.

- The *winter* (81.2%) was selected most often by Phase I respondents followed by 36.8% who mentioned *spring* and less than one in ten (6.8%) that named *summer*. Only three (2.6%) stated that they did not experience any off-peak sales months.

Similar to Phase I, full-time employees on average worked 39.9 hours per week during *peak* sales months (44.2, 2007) and 35.7 hours per week during *off-peak* sales months (37.0, 2007). Additionally, part-time employees worked an average of 21.4 hours per week during *peak* sales months (23.1, 2007) and 17.9 hours during *off-peak* sales months (19.3, 2007).

- Generally speaking, part-time employees working for either restaurants or retail businesses/stores worked longer hours on average than did those working in any of the other business types.

Among Phase III businesses, full-time employee reductions from *peak* sales months to *off-peak* months were lower than those observed in Phase I (36% reduction, Phase I and 18% reduction, Phase III).

Similar to last year, this average was not constant across all business types:

- Once again, outdoor/trail-related businesses cut a significantly larger portion of the *peak* sales season staff (84%), while lodging establishments and retail businesses/stores only reduced their staff size by 3% and 9%, respectively.

Once again in Phase III, part-time employee reductions from *peak* sales months to *off-peak* months were lower than those observed in Phase I (40% reduction, Phase I and 28% reduction, Phase III).

- Consistent with the findings noted for full-time employees, outdoor/trail-related businesses cut a significantly larger portion of the part-time *peak* sales season staff (85%) while retail businesses/stores and restaurants only reduced their staff size by 4% and 9%, respectively.

Seasonal Staffing Trends by Business Type

(Average Number of Employees)

				Phase III - Business Type				
		Phase I	Phase III	Lodging	Rest-aurant	Retail	Outdoor/ Trail Business	Other
Bases:		***117***	***120***	***40****	***26****	***22****	***17****	***12****
Full-time staff	**Peak-season**	23.7	7.6	3.9	12.2	6.0	15.2	7.7
	Off-Peak season	15.1	6.3	3.8	10.7	5.5	2.4	6.7
	% reduction	***-36%***	***-18%***	***-3%***	***-12%***	***-8%***	***-84%***	***-13%***
Part-time staff	**Peak-season**	20.5	10.3	8.2	11.8	6.0	26.0	11.0
	Off-Peak season	12.3	7.4	6.1	10.8	6.3	3.8	1.3
	% reduction	***-40%***	***-28%***	***-26%***	***-9%***	***--4%***	***-85%***	***-89%***

****Caution: small base sizes***

Appendix D – Calculated Receipts Model

In the 1998 Economic impact study, researchers calculated the amount of total sales (calculated receipts) that a business received from trail users by performing a calculation that included the following variables

- Average number of employees staffed:
  - Full-time/peak season **(FP)**
  - Full-time/off-peak season **(FO)**
  - Part-time/peak season **(PP)**
  - Part-time/off-peak season **(PO)**
- Average work hours per week:
  - Full-time employees/peak season **(FHP)**
  - Full-time employees/off-peak season **(FHO)**
  - Part-time employees/peak season **(PHP)**
  - Part-time employees/off-peak season **(PHO)**
- Number of months closed **(CM)**
- Number of months in off-peak season **(OM)**
- Estimated percentage of annual gross revenue attributed to the trail **(%)**
- Average employee wages by industry, derived from U.S. Bureau of Labor Statistics data **(AW)**

	Average Wage		
Occupation	**1998**	**Phases I & III**	**% +/-**
Retail/Cashiers	$5.98	$8.06	25.8%
Restaurant/Food service worker	$6.29	$7.86	20.0%
Lodging/Maids and housemen	$8.18	$11.14	26.6%

- Average ratio of earned revenue to such wages within a particular industry, derived from U.S. Bureau of Labor Statistics data **(R)**

	Revenue/Wage Ratio	
Industry	**1998**	**Phases I & III**
Retail	9%	10%
Restaurant	26%	28%
Outdoor/Sporting Goods	8%	10%
Lodging	33%	30%

The following pages will model this formula in a "step-by-step" equation format using the variables listed above.

First, the total hours worked by all employees during the months of the Peak Season (**TPH**) and the months of the Off-Peak Season (**TOH**) must be determined using the following equation:

	FULL-TIME HOURS WORKED/WEEK		PART-TIME HOURS WORKED/WEEK			NUMBER OF MONTHS
PEAK SEASON						
TPH =	(FP x FHP)	+	(PP x PHP)	**x 4.25**	x	(12 - OM - CM)
OFF-PEAK SEASON						
TOH =	(FO x FHO)	+	(PO x PHO)	**x 4.25**	x	OM
				WEEK TO MONTH MULTIPLIER		

Next, using the appropriate average hourly wage **(AW)** for employees working in a specific industry that is published by the U.S. Bureau of Labor Statistics, the following equation is used to determine the total dollar amount that was paid to employees in wages for the time they spent accommodating/addressing trail attributed revenue sources **(TTW)**:

TOTAL HOURS WORKED (SHEET A)		PERCENTAGE OF REVENUE ATTRIBUTED TO TRAIL RELATED BUSINESS		AVERAGE HOURLY WAGE
TTW = (TPH + TOH)	x	%	x	AW

$$TTW = (TPH + TOH) \times \% \times AW$$

Finally, using the appropriate revenue/wage ratio **(R)** published by the U.S. Bureau of Labor Statistics, which states the average amount of a businesses total revenue that is paid out in wages for a specific industry, **Calculated Receipts** are determined by performing the following equation:

$$\text{Calculated Receipts} = \frac{TTW}{R}$$

TTW: TOTAL WAGES ATTRIBUTED TO TRAIL BUSINESS (PREVIOUS EQUATION)

R: REVENUE TO WAGE RATIO