

2012 Trail Town Business Survey Report
for
The Progress Fund

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Center for Regional Progress
College of Business
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Executive Summary

The Great Allegheny Passage runs through several counties and affects a variety of businesses because of the number of visitors to the trail. The 91 businesses that responded to this survey were in five counties: Allegheny, PA, Westmoreland, PA, Fayette, PA, Somerset, PA, and Allegany, MD.

The majority of responding businesses were classified as a hotel/motel/B&B. Retail/gift/specialty stores and Bike rental/sales/supplies store were the second most cited groups.

Most responding businesses (18) had been open of 6-10 years. However, the distribution was relatively equal with those that been open 3-5 years (17) equal to those that had been opened 21-40 years. One average the businesses had been open 16.7 years.

Not surprisingly, summer and fall were the peak seasons for the trail businesses. Winter was the season that most businesses saw a downturn in trail user business. However, only 23 of the 88 responding businesses close for more than two weeks during the year, most commonly in December and January.

The responding trail businesses were generally small in terms of employment. Most responding businesses (43 of 88) use one to five full time employees. Most responding businesses (33 of 88) also use one to five part time employees.

The same pattern occurs for the off peak season. Most responding businesses (37 of 88) use one to five full time employees. Most responding businesses (23 of 88) also use one to five part time employees.

The majority of responding businesses (42) said that full time employees worked between 31 and 40 hours per week in the off peak season. The majority of responding businesses (24) said that part time employees worked between 16 and 30 hours per week in the off peak season.

When asked if they planned to expand, only 30 percent of businesses said yes. This is somewhat below the 32% that said yes in the 2008-2009 survey. When asked if the trail affected this decision 14 of the 30 businesses said yes.

About one-fourth of responding businesses reported gross revenue of more than \$250K. Comparing 2010 and 2011, responding businesses in every county reported an increase in gross revenues. Responding businesses in all but two business types reported an increase also. Retail and outdoor trail business showed a small percent decrease. Responding businesses reported about one-third of their gross revenue can be attributed to the trail.

On average about 30 percent of gross revenues were attributed to the trail. This is higher than the 25.5% reported in the 2008-2009 survey.

Estimated annual revenues generated from the trail per establishment was computed using reported annual gross revenue values, and the reported percentage of gross revenue from trail use. At the county aggregation level, the weighted average annual revenue generated from the trail *per establishment* was about \$650,000. At the firm type aggregation level, the weighted average annual revenues generated from the trail *per establishment* was \$2.1 million.

Question 1. What is the ZIP code of your business?

	Total	%	Lodging	Restaurant	Retail	Outdoor/Trail Business	Other
	88		31	22	12	9	14
Allegheny County, PA	8	9.1%	3	3	0	1	1
Westmoreland County, PA	6	6.8%	1	2	1	1	1
Fayette County, PA	19	21.6%	6	3	3	3	4
Somerset County, PA	33	37.5%	15	9	2	2	5
Allegany County, MD	22	25.0%	6	5	6	2	3

All (100.0%) of the respondents reported that their business location to be 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.

Question 2. What is the primary classification of your business?

Primary Business Classification

		Percent
Responses:	91	
Lodging	32	35.2%
Hotel/motel/B&B (23)		
Campgrounds (9)		
Restaurant/tavern/café/ice cream shop	24	26.4%
Retail	24	26.4%
Retail/gift/specialty store (16)		
Convenience/grocery store (8)		
Outdoor/Trail related business	9	9.9%
Bike rental/sales/supplies (7)		
Outdoor recreation/outfitter (2)		
Other	2	2.2%

Most of the respondents (35.2%) of the respondents described their business as either a *lodging*. Approximately one fourth (26.4%) mentioned operating a *restaurant/café/ice cream shop* and about ten percent operated an *outdoor/trail related businesses*.

Question 3: How long have you been in business in this location?

Age of Business (Number of Respondents by Range)

	Total	Lodging	Restaurant	Retail	Outdoor/Trail Business	Other
Responses:	84	32	20	12	9	11
1-2 years	11	4	3	2	0	2
3-5 years	17	8	5	1	3	0
6-10 years	18	7	4	2	3	2
11-20 years	14	6	4	1	1	2
21-40 years	17	6	1	5	2	3
More than 40 years	7	1	3	1	0	2
Mean (years)	16.7	13.2	15.9	18.9	11.4	26.0

On Average, the respondents tended to have businesses that were in these locations for a period of 16.7 years.

This average was influenced primarily by the majority (58.3%) of respondents that cited either 6-20 years (38.1%) or 21-40 years (20.2%).

Fewer than one in four businesses each reported operating at their current locations for either 1-2 years, 3-5 years, or more than 40 years (13.1%, 20.2%, and 8.3%, respectively).

Question 4a: What months of the year do you consider to be your peak season?

Peak Season Months (Number of Respondents)

	Total	Lodging	Restaurant	Retail	Outdoor/Trail Business	Other
Total Months Selected:	463	158	136	59	45	65
(Net) Spring	89	23	31	9	11	15
% Spring Months	19.2%					
March	9	0	4	1	0	4
April	30	8	9	3	4	6
May	50	15	18	5	7	5
(Net) Summer	200	74	52	22	26	26
% Spring Months	43.2%					
June	66	24	17	7	9	9
July	67	25	17	7	9	9
August	67	25	18	8	8	8
(Net) Fall	138	58	41	19	8	12
% Fall Months	29.8%					
September	62	29	18	7	5	3
October	55	26	15	7	3	4
November	21	3	8	5	0	5
(Net) Winter	36	3	12	9	0	12
% Winter Months	7.8%					
December	22	1	9	6	0	6
January	5	1	1	1	0	2
February	9	1	2	2	0	4

More than three in four (85.7%) of the 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 half (50.9%) of the respondents each mentioned peak sales months during either *summer* (June, July and/or August) (43.2%) and/or *winter* (December, January and/or February) (7.7%).

Question 4b: What months of the year do you consider to be your off season?

Off Season Months (Number of Respondents)

	Total	Lodging	Restaurant	Retail	Outdoor/Trail Business	Other
Responses:	340	145	75	30	48	42
(Net) Spring	86	45	15	9	10	7
% Spring Months	25.3%					
March	50	25	10	5	7	3
April	27	15	5	3	3	1
May	9	5	0	1	0	3
(Net) Summer	21	3	8	2	0	8
% Spring Months	6.2%					
June	6	2	2	0	0	2
July	8	1	4	1	0	2
August	7	0	2	1	0	4
(Net) Fall	62	25	12	5	12	8
% Fall Months	18.2%					
September	6	0	1	1	1	3
October	13	2	3	2	3	3
November	43	23	8	2	8	2
(Net) Winter	171	72	40	14	26	19
% Winter Months	50.3%					
December	47	24	7	3	8	5
January	64	24	17	5	9	9
February	60	24	16	6	9	5

Accordingly, businesses most frequently mentioned experiencing off-peak sales during *winter* (50.3% -- December, January and/or February). About one in four (25.3%) respondents reported that they experience off-peak sales during *spring* (March, April and/or May) and less than one in ten (6.2%) mentioned *summer* (June, July and/or August).

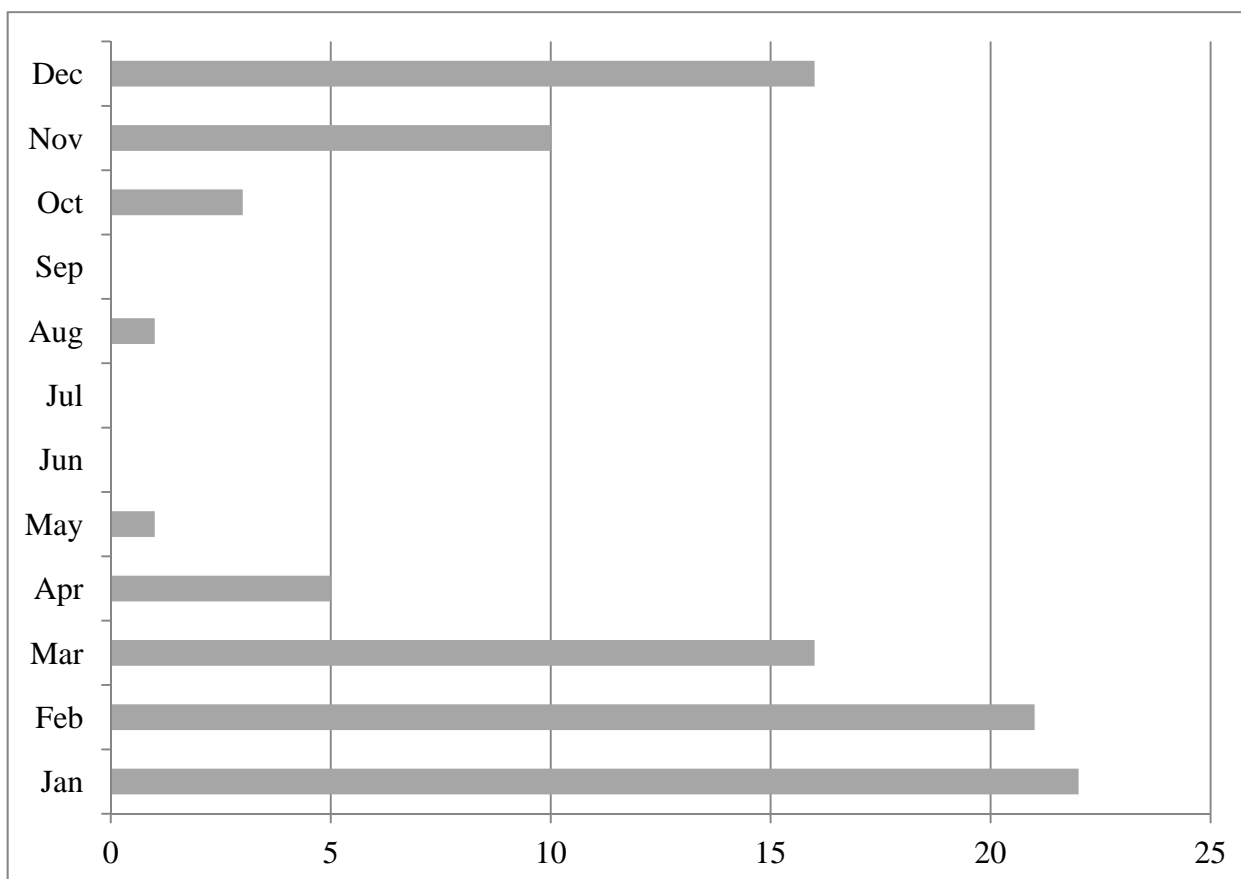
Question 5: Is your business closed for more than 2 weeks in any given month during the year?

Closures (Number of Respondents)

	Total	Lodging	Restaurant	Retail	Outdoor/Trail Business	Other
Responses:	89	33	22	12	9	14
Less than 2 Weeks	66	24	19	8	5	10
More than 2 Weeks	23	9	3	4	4	4

Most firms were closed less than two weeks and this occurred primarily in the winter months.

Question 5 cont'd: What months is your business closed?



Closure Months (Number of Respondents)

	Total	Lodging	Restaurant	Retail	Outdoor / Trail Business	Other
Total Months Selected:	52	19	8	8	9	8
January	22	8	2	4	4	4
February	21	8	2	4	4	3
March	16	7	1	4	2	2
April	5	1	1	1	1	1
May	0	0	0	0	0	0
June	0	0	0	0	0	0
July	0	0	0	0	0	0
August	1	0	1	0	0	0
September	0	0	0	0	0	0
October	3	1	1	0	1	0
November	11	4	2	1	2	2
December	16	6	2	2	3	3

Of the months that businesses were closed January, February and December had closure from each type of business including lodging, restaurant and retail stores.

Question 6a: How many persons, including yourself if appropriate, do you employ during peak season?

Full Time Employees During Peak (Number of Respondents by Range)

	Total	Lodging	Restaurant	Retail	Outdoor/ Trail Business	Other
Responses:	68	24	20	7	7	10
1- 5 people	43	14	14	5	5	5
6- 10 people	11	2	3	1	1	4
11- 25 people	8	3	2	1	1	1
More than 25	3	2	1	0	0	0
Mean	16.25	5.3	5.0	1.8	1.8	2.5

Part Time Employees During Peak (Number of Respondents by Range)

	Total	Lodging	Restaurant	Retail	Outdoor/ Trail Business	Other
Responses:	63	22	19	7	7	8
1- 5 people	33	16	5	4	4	4
6- 10 people	14	1	8	1	3	1
11- 25 people	11	2	5	1	1	2
More than 25	5	3	1	0	0	1
Mean	15.75	5.5	4.75	1.5	2	2

Most businesses used more full than part time employees during the peak season. Most businesses employed less than 5 persons in both full and part time capacity.

Question 6b: How many persons, including yourself if appropriate, do you employ during off season?

Full Time Employees During Off-Peak Season (Number of Respondents by Range)

	Total	Lodging	Restaurant	Retail	Outdoor/ Trail Business	Other
Responses:	63	20	17	7	8	11
1- 5 people	37	11	12	4	6	4
6- 10 people	10	3	3	1	0	3
11- 25 people	5	1	1	1	0	2
More than 25	2	1	1	0	0	0
Mean	13.5	4.0	4.25	1.5	1.5	2.25

Part Time Employees During Off-Peak Season (Number of Respondents by Range)

	Total	Lodging	Restaurant	Retail	Outdoor/ Trail Business	Other
Responses:	56	20	14	6	8	8
1- 5 people	23	12	2	3	3	3
6- 10 people	9	0	7	1	0	1
11- 25 people	9	3	4	0	0	2
More than 25	2	0	1	0	0	1
Mean	10.8	3.8	3.5	1.0	0.8	1.8

Most of these businesses tend to staff full time employees during their off-peak than they do part time employees. The majority of businesses employ 1-5 people, who are either part or full time (50.4%). Less than one in twenty of these businesses will employ more than 25 people.

Question 7a: How many hours per week does a person that you employ work during the peak season?

Average Full Time Hours During Peak Season (Number of Respondents by Range)

	Total	Lodging	Restaurant	Retail	Outdoor/ Trail Business	Other
Responses:	61	17	17	9	8	10
15 hours or less	0	0	0	0	0	0
16 - 30 hours	3	2	1	0	0	0
31 - 40 hours	42	6	16	6	5	9
More than 40 hours	14	6	2	3	2	1
Mean	19.7	4.7	6.3	3.0	2.3	3.3

In the peak season the average hours worked by full time employees was 19.7. No employees worked less than 15 hours that was employed at full time. The majority of employees worked between 31 to 40 hours.

Average Part Time Hours During Peak Season (Number of Respondents by Range)

	Total	Lodging	Restaurant	Retail	Outdoor/ Trail Business	Other
Responses:	62	22	18	7	6	9
15 hours or less	15	12	1	0	2	0
16 - 30 hours	39	5	17	5	4	8
31 - 40 hours	6	3	0	2	0	1
More than 40 hours	1	1	0	0	0	0
Mean	15.3	5.3	4.5	1.8	1.5	2.3

For part time hours that average was 15.3 hours, but majority worked no more than 30 hours.

Question 7b: How many hours per week does a person that you employ work during the off season?

Average Full Time Hours During Off-Peak (Number of Respondents by Range)

	Total	Lodging	Restaurant	Retail	Outdoor/ Trail Business	Other
Responses:	58	15	15	9	8	11
15 hours or less	2	2	0	0	0	0
16 - 30 hours	8	0	3	1	4	0
31 - 40 hours	32	7	11	5	1	8
More than 40 hours	9	3	1	3	1	1
Mean	12.8	3.0	3.8	2.3	1.5	2.3

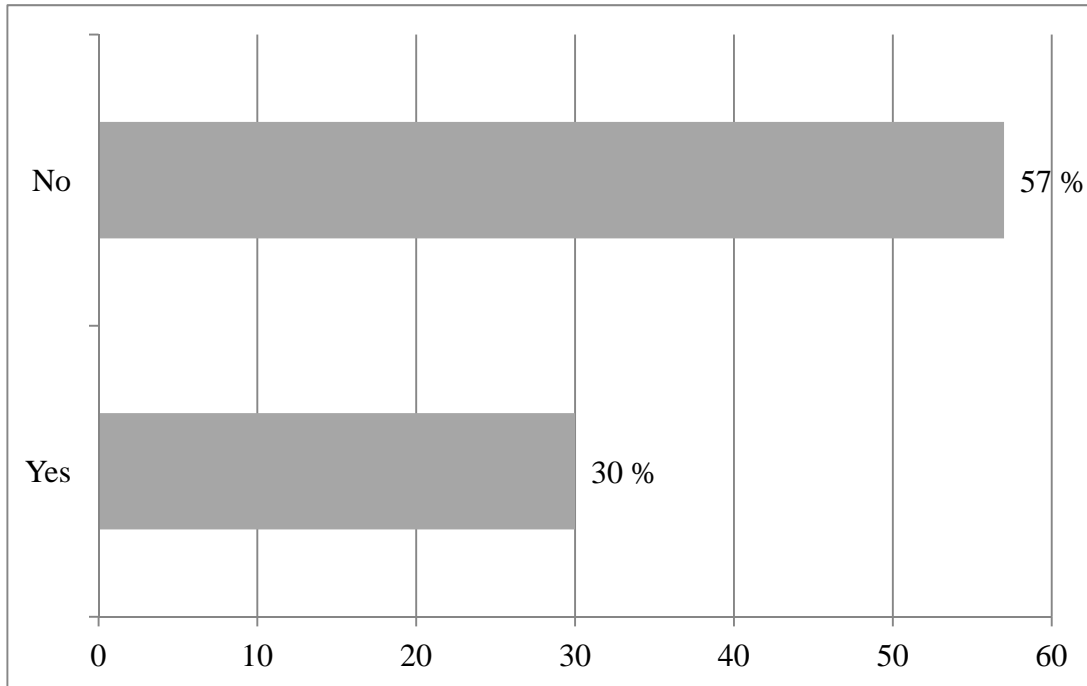
Average Part Time Hours During Off-Peak (Number of Respondents by Range)

	Total	Lodging	Restaurant	Retail	Outdoor/ Trail Business	Other
Responses:	52	17	14	5	7	9
15 hours or less	13	8	2	0	2	1
16 - 30 hours	24	3	12	3	1	5
31 - 40 hours	2	0	0	1	0	1
More than 40 hours	1	1	0	0	0	0
Mean	10.0	3.0	3.5	1.0	0.8	1.8

Full-time employees on average worked 14.8 hours per week during *peak* sales months, and 12.8 hours per week during *off-peak* sales months. Additionally, part-time employees worked an average of 15.3 hours per week during *peak* sales months, and 10.0 hours during *off-peak* sales months.

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

Question 8: Do you plan to expand your business?



Business Expansions by County (Number of Respondents)

	Total	Allegheny, PA	Westmoreland, PA	Fayette, PA	Somerset, PA	Alleghany, MD
Responses	80	8	6	19	33	22
Expand	30	3	3	9	8	7
Not Expand	47	4	3	9	24	15
Unknown	3	1	0	1	1	0

Business Expansions by Type (Number of Respondents)

	Total	Lodging	Restaurant	Retail	Outdoor / Trail Business	Other
Responses	89	33	22	12	9	14
Expand	30	11	10	3	4	2
Not Expand	47	22	12	9	5	12
Unknown	3	3	0	0	0	0

Most businesses did not plan to expand. Of those that did, the majority were in the lodging and restaurant businesses.

Question 8a: If yes, did the Trail have an impact on this decisions?

Trail Impacts by County (Number of Respondents)

	Total	Allegheny, PA	Westmoreland, PA	Fayette, PA	Somerset, PA	Allegheny, MD
Responses	30	3	3	9	8	7
Trail Affected	14	1	2	2	5	4
Not Affected	12	2	0	5	2	3
Unknown	4	0	1	2	1	0

Trail Impacts by Type of Business (Number of Respondents)

	Total	Lodging	Restaurant	Retail	Outdoor / Trail Business	Other
Responses	30	11	10	3	4	2
Trail Affected	14	7	4	0	3	0
Not Affected	12	4	4	1	1	2
Unknown	4	0	2	2	0	0

About half of the businesses said that the trail affected their decision to expand.

Question 9: Approximately what were the annual gross revenue figures for this business location?

Annual Gross Revenue 2010 by County (Number of Respondents by Range)

	Total	Allegheny, PA	Westmoreland, PA	Fayette, PA	Somerset, PA	Allegheny, MD
Responses:	84	8	6	18	30	22
Less than \$50K	12	0	1	2	8	1
\$50K - \$149K	8	1	0	2	4	1
\$150K - \$249K	7	0	1	1	4	1
More than \$250K	19	4	1	4	4	6
Refused/don't know	38	3	3	9	10	13
Mean (dollars)	\$750,697	\$1,450,200	\$449,231	\$768,549	\$351,618	\$733,889

Of the businesses providing annual gross revenue information, the average gross revenue was approximately \$751,000 for 2010 and \$3.4 million for 2011, though there was a wide range of

values across the five county regions. This same pattern was seen for 2010 and 2011. The firms may have had more ready information for 2011 than for 2010 but several counties experienced a significant rise in the average gross revenue.

Annual Gross Revenue 2011 by County (Number of Respondents by Range)

	Total	Allegheny, PA	Westmoreland, PA	Fayette, PA	Somerset, PA	Allegheny, MD
Responses:	85	8	6	18	31	22
Less than \$50K	16	0	1	5	8	2
\$50K - \$149K	9	1	1	2	5	0
\$150K - \$249K	9	0	1	1	5	2
More than \$250K	20	4	1	4	4	7
Refused/don't know	31	3	2	6	9	11
Mean (dollars)	\$3,454,494	\$1,558,000	\$418,653	\$663,557	\$349,094	\$14,283,164

Gross Revenue 2010 and 2011 by County (\$)

	Total	Allegheny, PA	Westmoreland, PA	Fayette, PA	Somerset, PA	Allegheny, MD
Responses:	45	5	3	9	19	9
2010 gross revenue	\$647,533	\$1,450,200	\$449,231	\$768,549	\$369,388	\$733,889
2011 gross revenue	\$705,519	\$1,558,000	\$531,537	\$879,598	\$388,241	\$785,644
% difference	9.0%	7.4%	18.3%	14.4%	5.1%	7.1%

Annual Gross Revenue 2010 by Business Type (Number of Respondents by Range)

	Total	Lodging	Restaurant	Retail	Outdoor / Trail Business	Other
Responses:	85	30	21	12	8	14
Less than \$50K	12	10	0	1	1	0
\$50K - \$149K	8	2	2	1	2	1
\$150K - \$249K	7	2	3	1	1	0
More than \$250K	20	7	5	1	4	3
Refused/don't know	38	9	11	8	0	10
Mean (dollars)	\$1,534,954	\$4,730,078	\$429,262	\$242,250	\$307,368	\$1,965,812

Annual Gross Revenue 2011 by Business Type (Number of Respondents by Range)

	Total	Lodging	Restaurant	Retail	Outdoor/ Trail Business	Other
Responses:	86	31	21	12	8	14
Less than \$50K	16	11	0	4	1	0
\$50K - \$149K	9	3	2	1	2	1
\$150K - \$249K	9	2	5	1	1	0
More than \$250K	21	7	5	2	4	3
Refused/don't know	31	8	9	4	0	10
Mean (dollars)	\$5,258,056	\$4,581,077	\$413,468	\$18,874,475	\$303,735	\$2,117,526

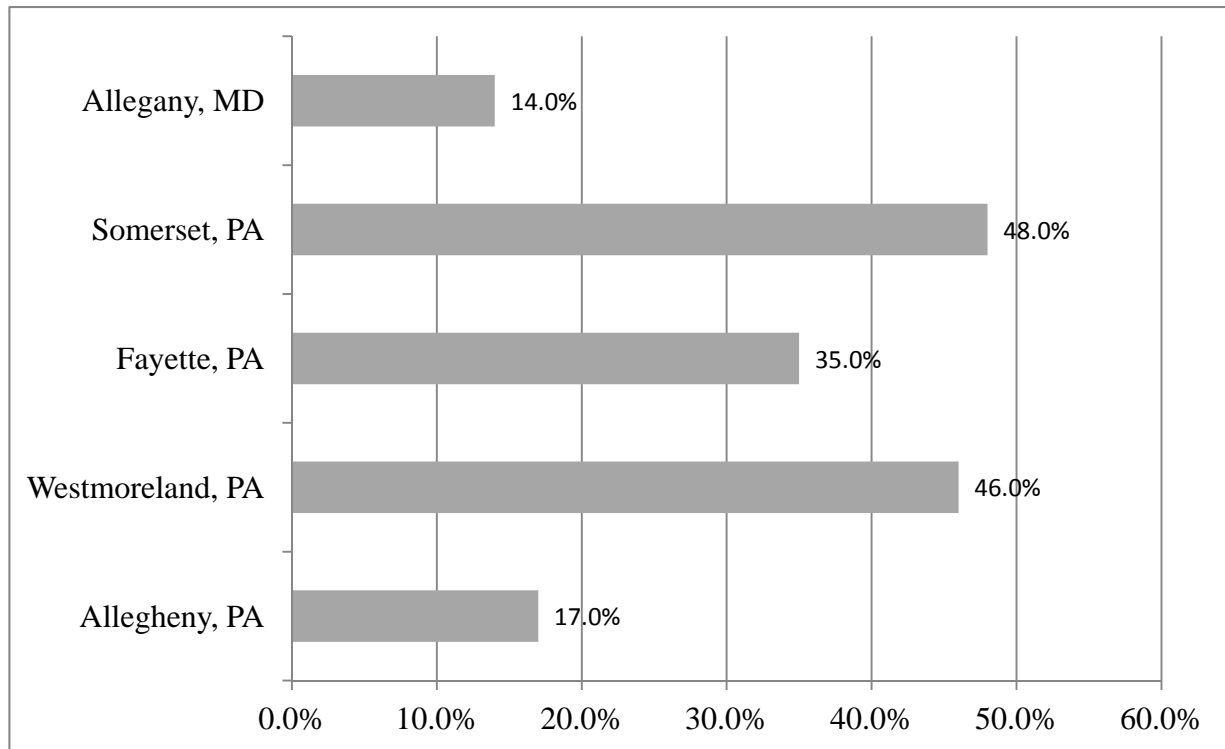
Annual Gross Revenue 2010 and 2011 by Business Type (\$)

	Total	Lodging	Restaurant	Retail	Outdoor/Trail Business	Other
Responses:	46	20	10	4	8	4
2010 gross revenue	\$1,751,648	\$ 4,928,806	\$ 427,169	\$242,250	\$307,368	\$ 1,965,812
2011 gross revenue	\$1,866,633	\$ 5,263,799	\$ 465,161	\$230,200	\$303,735	\$ 2,117,526
% difference	6.6%	6.8%	8.9%	-5.0%	-1.2%	7.7%

When looking at the businesses by type all but two types had experienced an increase in revenue from 2010 to 2011. Retail showed the highest decrease in revenue, but was still very close to the numbers of the previous year.

Question 10: Approximately what were the annual gross revenue figures for this business location attributable to the Trail?

Trail Related Revenue as a Percent of Gross Revenue

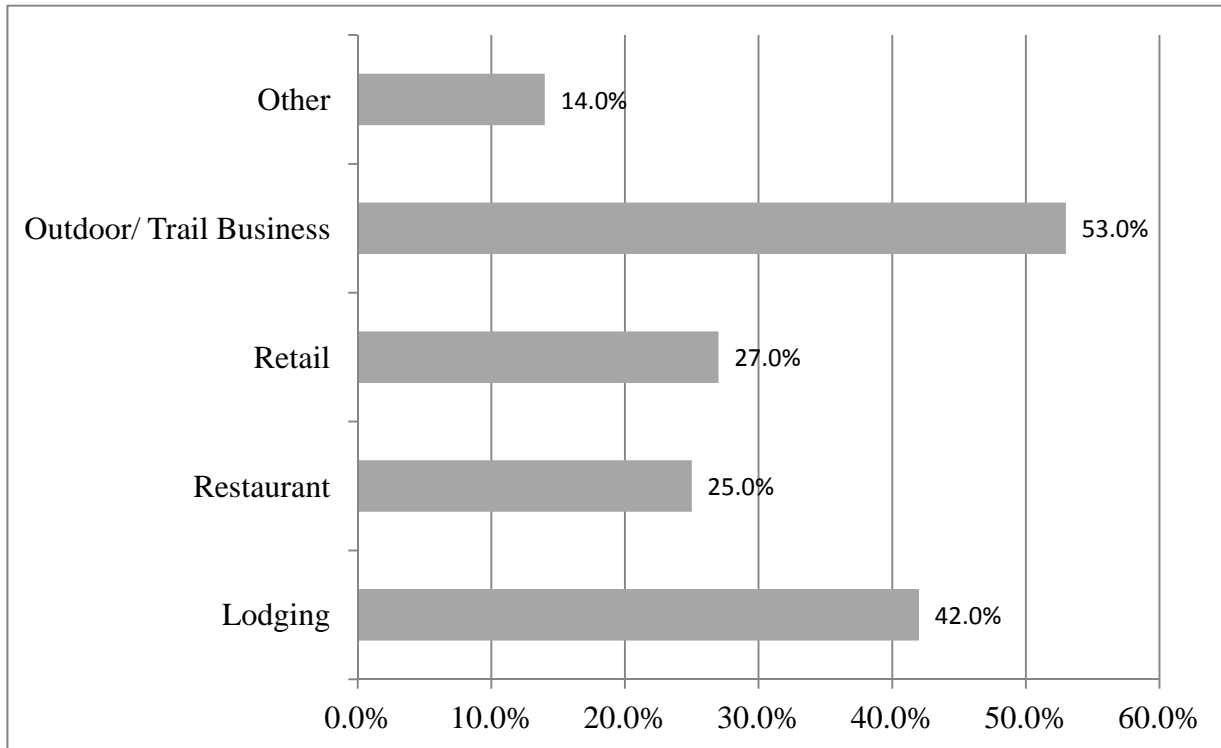


**Estimated Range of Gross Revenue from Trail by Location
(Number of Respondents by Range)**

	Total	Allegheny, PA	Westmoreland, PA	Fayette, PA	Somerset, PA	Allegany, MD
Responses (number):	80	8	6	19	33	22
None	9	1	0	0	2	6
Less than 5%	14	3	0	3	2	6
5% - 10%	11	1	1	1	4	4
11% - 50%	16	0	2	8	6	3
51% - 100%	17	1	2	3	14	2
Refused/don't know	13	2	1	4	5	1
Mean (percentage)	30.6%	17.0%	46.0%	35.0%	48.0%	14.0%

There was a wide variation in the percentage of gross revenue attributed to the trail. Some locations may serve more trail users exclusively, while other locations may serve a larger proportion of local patrons. On average about 30 percent of gross revenues were attributed to the trail.

Gross Revenue from Trail by Type of Business



Estimated Range of Gross Revenue from Trail (Number of Respondents by Range)

	Total	Lodging	Restaurant	Retail	Outdoor/ Trail Business	Other
Responses:	90	33	22	12	9	14
None	9	4	1	0	0	4
Less than 5%	14	4	5	2	1	2
5% - 10%	11	4	1	3	1	2
11% - 50%	20	7	7	3	2	1
51% - 100%	23	12	3	2	5	1
Refused/don't know	13	2	5	2	0	4
Mean (percentage)	32.2%	42.0%	25.0%	27.0%	53.0%	14.0%

Of the business that responded outdoor/trail businesses and lodging have revenues that are the most effected by the trail usage.

Trail Location Revenue by County

	Overall	Allegheny, PA	Westmoreland, PA	Fayette, PA	Somerset, PA	Allegheny, MD
Mean percentage of revenue associated with the trail per establishment	30.6%	17.0%	46.0%	35.0%	48.0%	14.0%
x Mean gross revenue (dollars) per establishment	\$3,454,494	\$1,558,000	\$418,653	\$663,557	\$349,094	\$14,283,164
= dollars associated with Trail Activity per establishment	\$1,057,075	\$264,860	\$192,580	\$232,245	\$167,565	\$1,999,643

Trail Location Revenue by Business Type

	Overall	Lodging	Restaurant	Retail	Outdoor/ Trail Business	Other
Mean percentage of revenue associated with the trail per establishment	32.2%	42.0%	25.0%	27.0%	53.0%	14.0%
x Mean gross revenue (dollars) per establishment	\$5,258,056	\$4,581,077	\$413,468	\$18,874,475	\$303,735	\$2,117,526
= dollars associated with Trail Activity per establishment	\$1,693,094	\$1,924,052	\$103,367	\$5,096,108	\$160,980	\$296,454

The trail has a positive effect on each county and business type by the revenue that it brings to the area that without the trail would not be occurring.

Question 11: What percent of your 2011 annual revenue would you estimate was generated through the indicated activities?

Percent of Gross Revenue

	Rentals	Repairs	Sales	Supplies	Other
Number of Responding Businesses	31	9	41	5	5
Percentage of Annual Revenue	74%	41%	84%	26%	40%
Responding businesses with more than 75% annual revenue from activity	23		33		

Business Survey

1. What is the zip code of your business?

 2. What is the primary classification of your business?
 Bike rentals/repairs/sales/supplies
 Campgrounds
 Convenience/grocery store
 Hotel/motel/B&B
 Outdoor recreation/outfitter
 Pharmacy/drug store
 Restaurant/tavern/café/ice cream shop
 Retail/gift/specialty store
 Transportation/shuttling
 Other_____
 3. How long have you been in business in this location?
_____ years _____ months
 4. 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
 5. Is your business closed for more than 2 weeks in any given month during the year?
 No
 Yes
If yes, which months? *Circle the months.*
Jan Feb Mar Apr May Jun
Jul Aug Sep Oct Nov Dec
 6. 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_____
 7. On average, how many hours per week does a person that you employ work during...?
a) Peak season: full-time_____ part-time_____
b) Off-peak season: full-time_____ part-time_____
 8. Do you plan to expand your business?
 Yes No
If yes, did the trail impact this decision?
 Yes No
 9. Approximately what were the annual gross revenue figures for this business location?
2010: \$ _____
2011: \$ _____
 10. What percent of your annual business would you estimate to be attributable to the trail?
_____ % _____ %
2010 2011
 11. What percent of your 2011 annual revenue would you estimate was generated through:
Rentals?: _____ % Repairs?: _____ %
Sales?: _____ % Supplies?: _____ %
Other?: _____ %
 12. Please explain any other actions that you have taken to attract and/or cater to trail users.

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

- Optional: If you would like a copy of the key findings of this study, please provide your email address below.*
