



Creating Opportunities Along the Nation's Trails

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2015 Business Survey Report

Erie to Pittsburgh Trail

March 2015





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Executive Summary



From 2014 to 2015 the Trail Town Program® conducted an economic survey of businesses along the Erie to Pittsburgh Trail in northwest Pennsylvania. Businesses were surveyed along the longest, contiguous, completed, section of the trail from Titusville, PA to Foxburg, PA.

This study is meant to compliment the trail user survey completed in 2013 by the Rails-to-Trails Conservancy and to highlight the economic impact the businesses are experiencing from trail users. This study utilized methodology previously used in the business survey completed along the Great Allegheny Passage in 2012. The questions are specifically designed to collect the economic impact of trail users on their business. These surveys were conducted from November 2014 until February 2015. Surveys were available online and in person to the businesses.

Twenty-nine businesses completed the survey. The majority of businesses classified themselves in the other (38%) category followed by eateries (21%) and retail (21%).

Businesses that responded were from Titusville, PA, Oil City, PA, Franklin, PA, Emlenton, PA, and Foxburg, PA. Businesses have reported that in 2014 19.15% of their annual business was attributed to the trail.

The majority of businesses noted that their peak season was from May through October. Out of the twenty-nine businesses only 12% were closed for more than two weeks of the year. Of the 12% that are closed it was during, December, January, February, and March.

In 2013 the Rails-to-Trails Conservancy conducted a Trail User Survey and Economic Impact Analysis along the Erie to Pittsburgh Trail. The results estimated an overall increase in trail users as well as an increase in economic impact from the trail on the region since 2006. The survey showed that the trail was used primarily for biking and the average age was between 56 and 65.



2013 EPT Trail User Survey and Impact Analysis

Overview

In 2013 the Rails-Trails-Conservancy completed a survey along the Erie to Pittsburgh Trail that consist of six trails between Titusville and Parker, PA. More then 1,700 surveys were distributed to trail users on the trail. These surveys were collected from 14 locations along the trail and were also available during community events. A total of 455 surveys were collected. The survey has shown an overall increase in trail users and economic impact from 2006. Below are highlights from the results of this study. For more detailed information from this study please visit www.railstotrails.org.

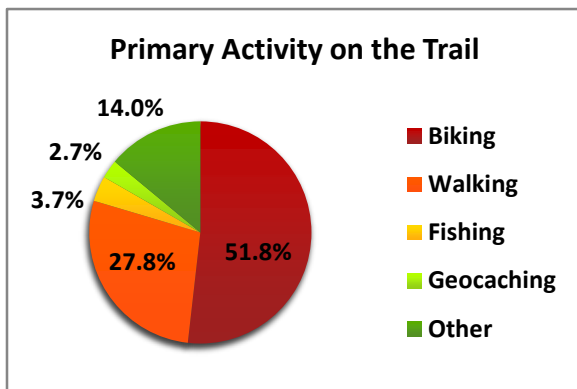
Results

2006 Trail User Survey	2013 Trail User Suvery
<ul style="list-style-type: none"> • 138,281 annual users (Multi-Use Trails) • +22,510 Hiking, Water Trails • \$4,310,000 Economic Impact 	<ul style="list-style-type: none"> • 158,507 annual users (Multi-Use Trails) <ul style="list-style-type: none"> ○ Hiking, Water Trails not studied • \$7,479,348 Economic Impact – including hard goods (bikes, racks, helmets, etc.) bought here & prior to trip • \$6,928,620 directly into the local economy

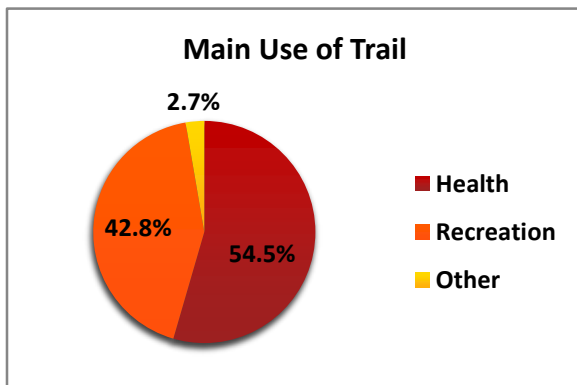
Average Age: 56 – 65 years (predominant age range)

Average Overnight Accommodations: \$80.20

Average Amount Spent/Person/Trip: \$21.62



From the trail users that responded to the survey the primary use of the trail is for biking followed by walking.



Trail users primary reason for using the trail is overwhelmingly for health and recreation.

2014 – 2015 Erie to Pittsburgh Business Survey

Overview

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

Along the Erie to Pittsburgh Trail twenty-nine businesses responded to the survey ranging from lodging, eateries, and retail. The survey consisted of thirteen questions asking businesses about what type of business they owned as well as how much of their customers were trail users. Below is the survey that businesses were requested to fill out and the results.

2014 – 2015 Erie to Pittsburgh Business User Survey Questions

1. What is the zip code of your business? _____
2. What is the primary classification of your business?
 Bike rentals/repairs/sales/supplies
 Campgrounds
 Convenience/grocery store
 Hotel/motel/B&B
 Outdoor recreation/outfitter
 Pharmacy/drug store
 Restaurant/tavern/café/ice cream shop
 Retail/gift/specialty store
 Transportation/shuttling
 Other _____
3. How long have you been in business in this location?
_____ years _____ months
4. 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. Do you plan to expand your business?
 Yes No
If yes, did the trail impact this decision?
 Yes No
8. What days of the week is your business open? Circle all that apply.
Sunday Monday Tuesday Wednesday Thursday Friday Saturday
9. What percent of your annual business would you estimate to be attributable to the trail?



- 2013 ____% 2014 ____%
10. Roughly what percentage of your guests/customers are international visitors?
2013 ____% 2014 ____%
11. What are your busiest days during your peak season? Circle all that apply
Sunday Monday Tuesday Wednesday Thursday Friday Saturday
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. _____

Results

1. What is the zip code of your business?

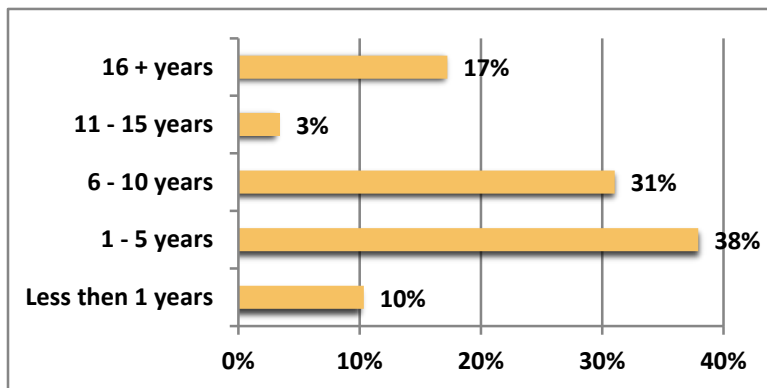
Zip codes were collected to confirm that businesses were in close proximity of the trail corridor.

2. What is the primary classification of your business?

Business Classification	Amount
Bike rentals/repairs/sales/supplies	2
Campgrounds	0
Convenience/Grocery Store	0
Hotel/Motel/Bed & Breakfast	4
Outdoor recreation/outfitter	0
Pharmacy/drug store	0
Restaurant/tavern/cafe/ice cream shop	6
Retail/gift/specialty store	6
Other	11

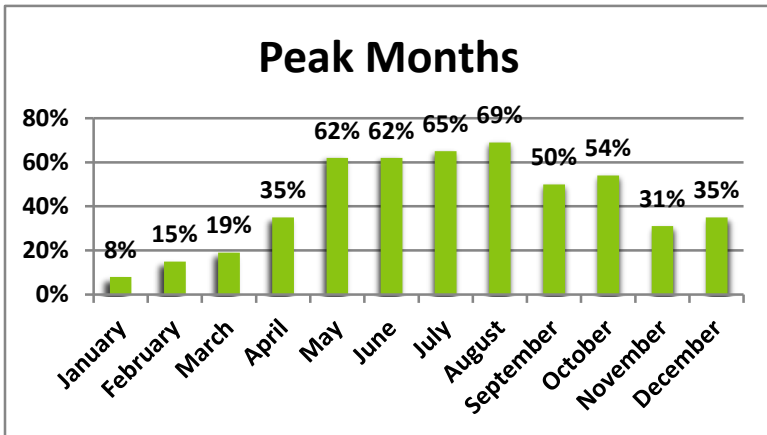
This is a breakdown of the 29 businesses along the Erie to Pittsburgh that responded to the survey. There were no submissions from campgrounds, convenience/grocery Stores, and pharmacy/drug stores.

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

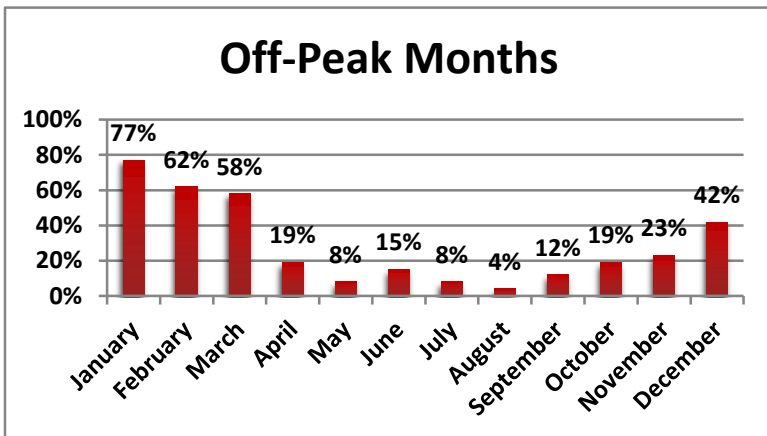


The majority of businesses that responded have been in business in their location for **10 years or less**.

4. What months of the year do you consider your peak or off-peak months?



The majority of businesses reported that May through October were their peak business months.

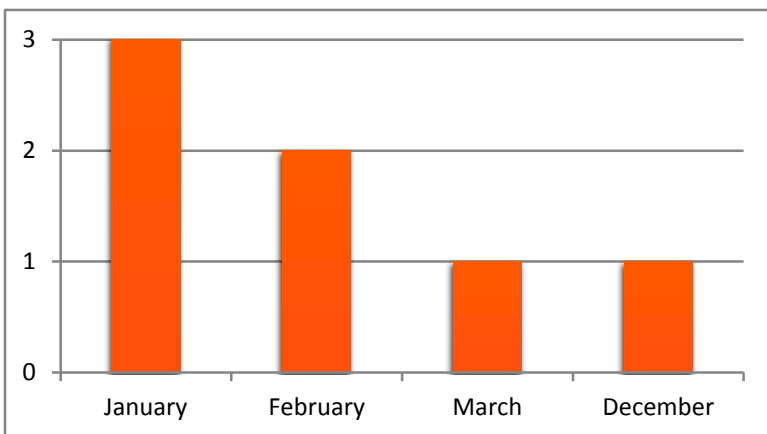


The majority of businesses report that December through March were their off-peak months.

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

Of the twenty-nine businesses that responded to the survey only 3 of them are closed for more then two weeks of the year.

If yes to the prior question, which months:



From the businesses that said yes to being closed for more then two weeks of the year, this is a breakdown of when they were closed.

6. How many persons, including yourself, do you employ during...

- a. **Peak Season:** During peak season businesses averaged **2 full-time employees and 6 part-time employees.**
- b. **Off-Peak Season:** During off-peak season businesses averaged **2 full-time employees and 5 part-time employees.**

Between peak season and off-peak season there was little difference in the average amount of employees that are working in businesses. The average for part-time employees in the off-peak season dropped by one. Total employees employed by all the businesses in our survey during peak season were **56 full-time and 165 part-time employees.** In the off-peak season the amount of employees dropped to **52 full-time employees and 123 part-time employees.**

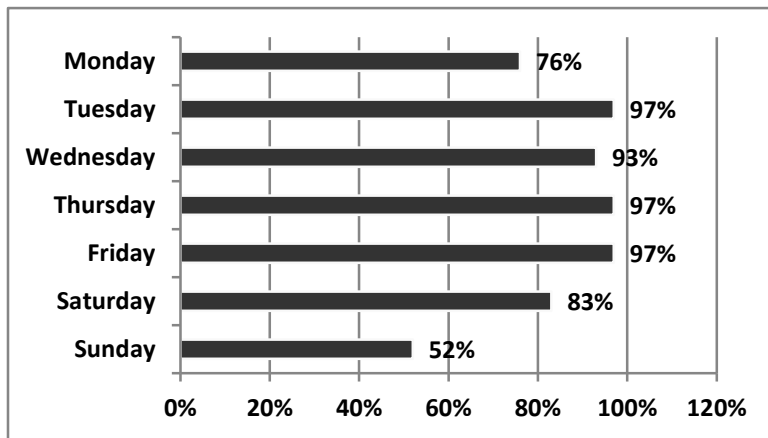
7. Do you plan to expand your business?

Seventeen of the businesses that were surveyed planned to expand their business.

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

Out of the businesses that said yes to expansion **twelve** said that the trail impacted their decision.

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



The majority of businesses that responded are open Monday through Sunday. **A little more than half are closed on Sunday.**

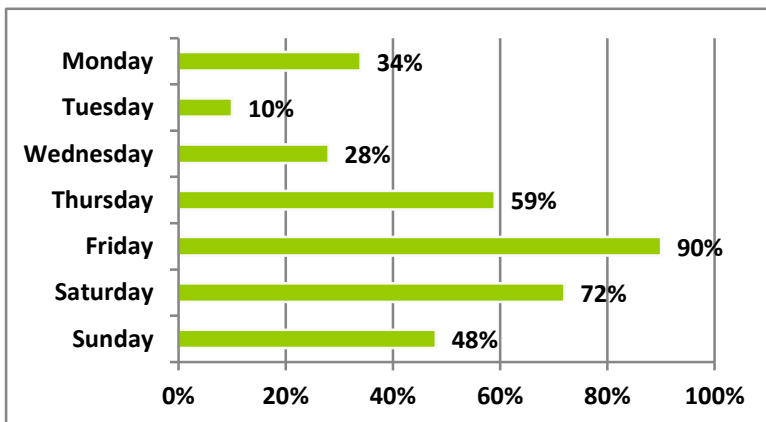
9. What percentage of your annual business would you estimate to be attributed to the trail in 2013 and 2014?

In 2013 from the businesses that responded, an average 10% of their business was attributed to the trail. In 2014 that average percentage rose to 19.15%, showing almost a 10% increase in trail related business.

10. Roughly what percentage of your guests/customers are international visitors in 2013 and 2014?

In 2013 the businesses averaged about 1.93% of their customers were international. In 2014 the average was 3.3% of their customers, about a 1% increase from the prior year.

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



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



Business Survey Comments

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

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

- Have had a bike rack out front. Allowed a visitor center to be placed in our business.
- Display trail maps and flyers, suggest to most of my customers to utilize the trails in our local proximity. Donate kayaks to Rails to Trails for raffle
- We offer a paddle and peddle trip
- Working with Trail Town action team and local trail organization
- Storage, tools, decor, information, dietary assistance, friendly
- We are interested in building cohesive packages bringing together collections of offerings by businesses in the area.
- New signage at mill, flyers at trail head, website
- I recently expanded and have a complimentary beverage bar, table and chairs for a rest break as well as a restroom and a large wash sink for filling any size water container.
- We are a hub for tourist to find information about our town
- We try and have healthier choices on our menu and work with the park staff to promote downtown
- Continued maintenance of the trail, updated signs and mile markers
- Place business flyer at local hotels
- We just opened our guest house in August of 2014 so we have not had many guests and no bikers as yet. We are located 7 miles from the trail-head at Franklin PA. We plan to shuttle folks traveling the Erie to Pittsburgh Trail and their bikes to our guest house so that they can rest and relax for an evening in the country before continuing their journey.

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

- New businesses for trail services would mean new members for our chamber
- The trail is the positive energy for the future and "is" making a difference economically
- All persons involved in the area need to be involved and the trail is one way of making the reform happen.
- Need Emlenton to Foxburg completed
- The economy in Titusville is not good we have a terrible unemployment rate most of our business is from out of town and the trail helps to bring tourism to our little town
- We are in an economically challenged rural community. The trail project can certainly enhance the business economics but it can also lead to more growth as people travel through and appreciate the advantages of a small rural community - relocation - business partnerships - vacationing, etc.
- Directional sign have been installed as well as sharrows. A kiosk will be installed soon and we also have a sign "Trail info inside". We hope to add a bike rack at the front of our building.
- Franklin is a wonderful little Victorian town with a bicycle shop right on the trail. Franklin caters to bikers with convenient access from the trail to the downtown area with a sporting goods store, restaurants and shops.