Trail Town Economic Impact Study (Phase I: Business Survey)
Researched and Prepared by Campos Inc., 2008 for the Progress Fund and Laurel Highlands Visitors Bureau

Purpose: This report was conducted in order to update data in Phase I of the study from a 2005 economic impact study.

Location: This report focuses on businesses located in counties surrounding the Great Allegheny Passage which runs from the Pittsburgh, PA area to the Cumberland, MD area.

Study Design: An invitation was mailed to 500 businesses containing a brief description of the project and a link to access the online survey in order to collect the data used for this report. The businesses who did not respond within the first two weeks were contacted and interviewed over the phone. If the respondents were unavailable for the phone interview, they were asked to complete the survey via mail, fax, or email.

Key Findings:

- Gross sales/revenue and trail attributed revenue percentage (8-9)
    - Average Revenue for 2006 and 2007 were $771,522 and $773,310 respectively
    - Compared to 2006, average gross revenue for 2007 increased by 18.8% in outdoor/trail related businesses.
    - The area's biking/hiking trail attributed to an estimated average of 25.5% of the business respondents received in 2007.
        - The largest of the percentage estimates used were observed among outdoor/trail related businesses and lodging/hotel establishments (51.2% and 33.3%, respectively)
- Perceived economic impact (10)
    - 64.4% of respondents reported that their sales/revenue had increased at least somewhat as a direct result of the trail.
        - 84.6% of outdoor/trail related businesses, 79.2% of restaurants, and 65.7% of lodging/hotel establishments reported an increase in sales/revenue due to the trail.
- Trail influenced expansions and/or additions (11-12)
    - 62.4% of respondents credited the trail with having some influence on the location of their business.
        - Restaurants: 80.8%
        - Outdoor/trail related businesses: 76.5%
    - 27.4% of respondents reported investing in additional advertising, primarily in publications/trail books and/or signs on the trail (14.5% and 7.7%, respectively).
        - Restaurants were significantly more active in advertising than all other business types (53.8% versus 8.3% - 23.5%, respectively)
- Respondent profile (14)
    - 46.2% of respondents chose the months of bike season (April to October) as their peak sales months.
    - 33.3% exclusively selected the summer months (June, July, and August) as their peak sales months.
    - Full-time employees worked 44.2 hours per week, on average, during peak sales months and 37.0 hours per week during off-peak months.

Summary written by Emma C. Ruth, June 2010