



Industrial
Heartland
Trails
COALITION

I Heart Trails Tourism Strategy

January 2016

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Table of Contents

| | |
|---|----|
| Acknowledgements..... | 4 |
| Executive Summary..... | 5 |
| Project Background..... | 7 |
| Methodology..... | 8 |
| Current State of Trails and Tourism..... | 10 |
| Tourism Readiness and Destination Appeal..... | 19 |
| Tourism Strategy Recommendations..... | 29 |
| Reference List..... | 39 |
| Appendices (appear in printed document) | |
| 2015 Tourism Readiness Partner Survey Results | |
| 2015 Tourism Readiness Stakeholder Survey Results | |
| Local Tourism Inventory | |

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Front porch of Hotel Lenhart, located along Lake Chautauqua. The lake is one of 350 attractions identified in the Industrial Heartland Trails Coalition Attractions Inventory.

Executive Summary

While not traditionally viewed as attractions that contribute to tourism and local economies, trails have become destination worthy sites and formidable economic generators. Trails and tourism have become intertwined to the benefit of communities, small businesses, and points of interest. To achieve maximum impact, the trails must become even more connected to “beyond the trail” opportunities.

The Trail Tourism Strategy Project, which includes this strategy document, set out to:

- 1) Inventory tourism attractions along the IHTC trail corridors
- 2) Assess overall destination appeal and visitor readiness of the trails
- 3) Develop a strategy for marketing IHTC trails



Some of the topics examined as part of the Trail Tourism Strategy Project

Key Insights

Regional stakeholders hold their places and trail corridors in high regard. While not all of the IHTC trail corridors are “tourism ready,” people believe them to be *destination worthy*. We see value in our trails and our places. This trails-positive, place-positive outlook positions the region to capitalize on trails and invite visitors to experience what we know to be special about this area. Conversely, when negativity reigns, progress is stalled and mediocrity is tolerated. The region is poised for unprecedented trail development because those advocating for it believe in the possibility of trails.

A bold vision of a marketing a connected 1,450-mile trail system requires much work. A system of this scale will become a *destination*. A “destination trail” is one that people will travel to – a trail that has lure, a “wow” factor, and leaves lasting impressions. A 1,450-mile system will be impressive based on mileage alone, not to mention the tremendous diversity of sites and character within the system. But the trails “marketplace” is competitive; there are nearly 2,000 rail-trails in the United States. For the trails that make up the IHTC footprint to earn a positive reputation, trail advocates and placemakers must come together to ensure that the trails are of destination caliber. Building and maintaining high quality trails and community connections is paramount.

There are some significant barriers to successfully attracting trail visitors. Chief among them is that there are gaps in the trail system. If the coalition does nothing else, continuing to push for trail development – at least 44 miles a year – is the best course of action to position the region for future trail tourism. Marketing of the system as a whole should be delayed until more trail miles are completed. There are, however, many other actions that can be taken to position the region for trail tourism. Some of these are included in the Recommendations at the end of this document.

While there is need for improvement, the region has an outstanding offering of trails and “beyond the trail” attractions. The trails alone offer serenity, scenery, historic sites, industrial

relics, public art, trailside eateries, and so much more. Beyond the trail, visitors can cycle, drive, or be transported to a wide variety of attractions. We learned of hundreds of such places when we surveyed stakeholders on visitor attractions. Among the draws named were Lake Erie (named 29 times!), state parks (Prickett's Fort, Oil Creek, Presque Isle, and Point State Park among them), Cuyahoga Valley National Park, the Chautauqua Institution, A Christmas Story House & Museum, Drake Well Museum, Homer-Laughlin China Factory (maker of Fiesta Ware), wineries, breweries, Underground Railroad stops, railroad turntables and viaducts, old coke ovens and blast furnaces, artisan trails, ballparks, downtowns of every size, and *“that view”* (of which there are many).



The Homer-Laughlin China Factor, maker of Fiesta Ware, is located near the Pittsburgh to Ashtabula Corridor.

blast furnaces, artisan trails, ballparks, downtowns of every size, and *“that view”* (of which there are many).

The tourism potential along the trail corridors has not nearly been realized. While it is essential to have services along and near trails, we should not limit ourselves to thinking about trail tourism as something that happens in short-range. Much of the unrealized opportunity is further out. Because many local and regional trail users are traveling by vehicle, itineraries and trips can be developed that reach further. Iconic sites and hidden gems 5, 10, and 15 miles from the trail may become part of the full experience. The economic potential of trails has long been connected to multi-day visitors who put “heads in beds.” This certainly is an important part of the target market, but this strategy asserts that casual, short distance cyclists may have both the time and proclivity to explore trail communities and out-of-the-way sites, and to pay for immersive experiences.

The Industrial Heartland Trails Coalition is in the unique position to influence trail development, trail quality, trail-to-town connections, and tourism promotion. Trails already have become influencers in placemaking and tourism, but not to the extent that is possible. The coalition can push for better trails, stronger connections, and improved marketing by demonstrating the power of trails and creative approaches to trail tourism. Some of these opportunities are outlined in this strategy.

Project Background

Coalition Background

The Industrial Heartland Trails Coalition (IHTC) supports the work of its trail-building organizations by providing a forum, mutual support, and a shared vision to complete, by 2033, their individual projects resulting in a 1,450-mile network of off-road, non-motorized trails in 48 counties in western Pennsylvania, eastern Ohio, northern West Virginia, and southwestern New York. Already, 48 percent of these miles have been completed by members and are open to the public. The mission of the coalition is to bring the power, capacity, and expertise of its members to bear for the benefit of each local trail as well as to advocate for broader support of all the off-road, non-motorized trails in the region in order to complete the regional trail network. The individual members include trail groups, government agencies, nonprofit organizations, and private foundations. The coalition believes that the strengths of the individual trails can be leveraged into a regional network that still retains the character of the individual projects.

Project Background

The decision to assess tourism readiness and to develop a corresponding strategy comes out of the recognition that trails and tourism make a significant mark on the local and regional economies. In connecting over 1,400 miles of trails, the coalition must also be prepared to connect trail users to local communities, business services, and iconic sites. The coalition's desired impact can only be realized if it and its partners succeed in enticing trail users to go beyond the trail and explore nearby communities and attractions where they will have stellar experiences. This commitment to "beyond the trail" experiences necessitated a tourism assessment and strategy. In June 2015, on behalf of IHTC, Pennsylvania Environmental Council contracted Cycle Forward to assess tourism readiness and develop a strategy that offers a possible path forward in engaging in trail-related tourism promotion. The seven month project included tourism readiness surveys, development of an attractions inventory, and this strategy document.

This strategy follows the 2015 naming of the coalition and the brand foundation that was established as a part of that process. The strategy assumes that active promotion of the network as a whole will occur closer to the time of trail completion.

Methodology

Tourism Readiness Survey Methodology

One of the first tasks in launching the project was administering two separate, but similar electronic surveys during the summer of 2015. The **Partner Survey** invited IHTC partners¹ to respond to 22 questions intended to inform the project team on perceptions concerning tourism readiness and barriers to tourism promotion as well as to crowd-source an inventory of visitor attractions along each corridor. The survey was completed by 22 of approximately 40 partners (18 completed the survey in its entirety).

The second survey distributed was the **Stakeholder Survey**. This self-selected survey was completed by 159 people throughout the IHTC project area. Most respondents are presumed to be trail, tourism and community advocates who learned about the survey through the coalition and local entities. Fifty percent of respondents identified themselves as trail users. Other commonly named affiliations were nonprofit organizations and municipal governments.²

While the Partner and Stakeholder surveys varied in length, the purpose was consistent and enabled the team to compare and contrast perceptions, challenges and opportunities concerning trail tourism. Prompting survey participants to list area attractions resulted in a wealth of individual sites named across the various corridors. Primm Research, LLC was contracted to process, clean, and analyze the data, which included over 900 text responses. A significant product to come out of the survey process was the attractions inventory, which includes 350 unique sites. The results are detailed in the Tourism Readiness and Destination Appeal section.

In addition to the attractions identified through the survey process, another 60 or so assets were pinpointed along the Parkersburg to Pittsburgh corridor during a summer working group meeting held on August 25, 2015. The brainstorming activity conducted at the meeting resulted in the additional assets arranged by specific trail or segment; these are reflected in the inventory.

Attractions Inventory

The attractions inventory was sourced primarily from the Partner and Stakeholder survey responses. The inventory reflects top of mind awareness of local and regional visitor attractions and presents them in a single-source document that identifies area attractions by corridor.

¹ For purposes of this project, “Partners” are defined as those individuals who receive invitations to coalition partner meetings to represent their organizations. Most such organizations have signed on as “Coalition Partners,” with the exception of state agencies, which are typically precluded from joining coalitions.

² Respondents were able to check all applicable affiliations. Many who selected “trail user” also had other roles relevant to trails and tourism.

Conventional thinking might result in a listing of attractions that are easily accessible from the trail (1-2 miles, perhaps). This inventory takes a different approach. While it is essential to have accessible services close to the trail, the survey encouraged people to share attractions within a 10-mile radius of the trail corridors. This decision to “cast wide” was based upon the reality that most trail users in the IHTC project area are supported by their personal vehicles, providing them the mobility to combine a trail visit with other activities. It is thought that this is where much of the unrealized economic potential lies.

The raw data provided by survey participants was adapted in the following ways:

- The sites are housed in a Google Sheets document and listed by corridor.
- Sites that were mentioned multiple times were combined and the frequency of mentions was recorded.
- Some of the responses received were not site specific, and rather reflected an area’s most popular activities (kayaking, hunting, fishing, etc.) or scenic and natural appeal (lake views, photo ops, etc.). Given the interest in reflecting perception around the region’s assets, these are recorded at the bottom of each page as “General Assets.” Points of interest that cover a large geographic area (Lake Erie, Ohio River, water trails, etc.) were also included in this list.
- Each attraction was assigned a category and subcategory so that sites may be sorted by type for future tourism promotion (for example, imagine sorting for wineries or museums). Each site was additionally assigned a level of visitor appeal (“demand generator,” “demand supporter,” or “hidden gem”).³ These were assigned based on best judgment as well as the number of times a particular site was mentioned. The inventory is a working document that will be added to and corrected over time.
- For the partner survey, partners were asked to identify points of interest throughout the entire IHTC project area, beyond the corridor for which they were answering. Their responses indicate a recognition or general awareness of major assets and draws and the regional value of the overall project. The tabs list these as “Identified POIs Out of Corridor.”
- The attractions inventory does not represent a full listing of visitor amenities or locally-serving businesses. It is not a comprehensive listing, nor does it intend to be. Rather, it represents the attractions known by those who participated in the survey process. A small number of overlooked sites were added by the consulting team and staff; these are marked “staff”.

The inventory has not been vetted for tourism appeal or readiness; this would have introduced subjectivity into the list and changed the nature of the document. The list has been cleaned and formatted. It was de-duped, organized by corridor and frequency of mentions, and basic corrections were made. The content has otherwise not been changed, as the intent is to reflect the regional stakeholders’ views of the assets and attractions along and near the trail corridors. The inventory is further discussed in the Tourism Readiness and Destination Appeal section.

³ Terms by Tourism Nova Scotia. Demand Generators are primary motivators for visiting a region; Demand Supporters contribute to the overall appeal on an area; Hidden Gems may not be thought of as tourism offerings, but have the potential to add to a visitor’s experience.

Current state of trails & tourism

IHTC Tourism Universe: State Level Promotion

The annual Survey of State Tourism Office Budgets conducted by the U.S. Travel Association provides insight into statewide tourism investment. New York ranks among the leading states in such investment, while Ohio, Pennsylvania, and West Virginia lag behind. Pennsylvania ranks second to last nationally (45th)⁴ among state tourism offices in terms of promotional spending despite tourism being one of the state's leading industries. The budget figures referenced in this section represent 2014-15 provisional budgets for the 46 states that responded to the U.S. Travel Association survey.⁵

State Tourism Spending and Reach

| State | Tourism Budget* | Advertising & Promotion** | Website | Facebook Reach ⁶ |
|---------------|---|-----------------------------------|---|-----------------------------|
| New York | \$37 million (6 th nationally) | Did not report | http://www.iloveny.com/ | 1.3 million |
| Ohio | \$8 million (35 th) | \$3 million (\$36 th) | http://www.discoverohio.com/ | 154,000 |
| Pennsylvania | \$7.3 million (36 th) | \$10,000 (45 th of 46) | http://visitpa.com/ | 112,000 |
| West Virginia | Did not report | \$5 million (30 th) | http://gotowv.com/ | 159,000 |

*For comparison purposes, the five highest budgets in state tourism range from \$85 million to \$46 million in the states of Florida, Hawaii, California, Illinois, and Texas. New York ranks sixth at \$37 million.

**The five highest advertising and promotion budgets range from \$68 million to \$25 million in the states of Hawaii, Florida, California, Texas and Illinois.

⁴ Among the 46 states that responded to the survey.

⁵ The budget information is based on each state's provisional budget at the time of completing the survey. The vast majority of state tourism budgets are funded through lodging and other tourism taxes. The "state tourism budget" does not reflect funds spent in tourism promotion. Those are more accurately reflected in the table column titled "Advertising and Promotion." Not all states respond to the annual survey.

⁶ As of January 18; numbers rounded.

Trends in State Tourism Investment

Cumulative state tourism spending was at an all-time high in 2007-08. Nationwide, budgets dropped in 2007-08, and again in 2008-09, and have been steadily climbing in the years since. While we do not have access to the full study results, both Ohio's and Pennsylvania's tourism budgets increased over the past two years (from \$5.0 million and \$5.8 million, respectively in 2012-13, to \$8 million and \$7.3 million in 2014-15). These increases fit the national trend of a post-recession rebound in state funds allocated to tourism spending.

Nevertheless, the majority of U.S. states dedicate more to their tourism and advertising budgets than Ohio, Pennsylvania and West Virginia appear to spend. In 2014-15, 25 states' provisional tourism budgets were set between \$10-19 million. Ohio and Pennsylvania ranked 35th and 36th, respectively, Ohio allocating \$3 million and Pennsylvania just \$10,000.

States known to value and promote trails spend significantly more than Ohio and Pennsylvania. Oregon, named Best Trails State by American Trails in 2015, dedicated \$14 million to its state tourism budget. Missouri (2013 Best Trails State and home to the Katy Trail) spent \$19 million. Michigan, another state known to place emphasis on trail development, set its budget at \$33 million. Nearby states of Kentucky (\$11 million) and Maryland (\$12 million) fared better as well. To be clear, these figures represent state tourism office budgets, not trail promotion or development expenditures. There may, however, be a correlation between a general value placed on tourism promotion and value placed on trails as legitimate attractions.



IHTC Tourism Universe: Regional Promotion

The eight IHTC corridors pass through areas promoted by 38 tourism promotion agencies (TPAs), nearly all of them convention and visitor bureaus (CVBs). They range in sophistication, reach, budget, and trail promotion. An inventory of these organizations is provided in a separate Excel document. Key findings concerning local and regional TPAs appear below.

TPAs with the most Significant Social Reach

| Entity | Facebook Likes* | Notable Destinations | Corridors Impacted |
|---|-----------------|---|--------------------------------------|
| Destination Cleveland | 67.1K | City of Cleveland, Lake Erie, Cuyahoga NP | PIT-CLE, CLE-ERIE |
| Laurel Highlands | 45.4K | Great Allegheny Passage, Fallingwater, Ohiopyle | P2P, PIT-HBG, ERIE-PIT |
| Visit Erie | 38.1K | Lake Erie / Presque Isle SP | ERIE-PIT, CLE-ERIE |
| Visit Pittsburgh | 31.0K | City of Pittsburgh | PIT-CLE, ERIE-PIT, PIT-ASHT, P2P |
| Beaver County Tourism | 22.7K | Old Economy Village | PIT-ASHT |
| Chautauqua County | 17.5K | Lake Chautauqua, wineries and breweries, Chautauqua Institution | ERIE-PIT |
| Greater Morgantown | 18.0K | City of Morgantown, WVU | P2P |
| PA Great Outdoors (Clarion & Jefferson) | 10.6K | Cook Forest | Wilds Connector, Wild West, ERIE-PIT |
| Lake County (OH) | 10.0K | Lake Erie, wineries | CLE-ERIE |

*Numbers rounded January 4, 2016

Most other county-wide tourism organizations range from 1,000 – 5,000 Facebook “likes.” Most, but not all, also have Twitter and Instagram accounts.

Tourism Entities by the Corridor

| Corridor | Number of Organizations |
|---------------------------|-------------------------|
| Cleveland to Erie | 5 across 96 miles |
| Erie to Pittsburgh | 8 across 261 miles |
| Parkersburg to Pittsburgh | 13 across 335 miles |
| PA Wilds Connector | 6 across 170 miles |
| PA Wild, Wild West | 3 across 62 miles |
| Pittsburgh to Ashtabula | 6 across 148 miles |
| Pittsburgh to Cleveland | 11 across 242 miles |
| Pittsburgh to Harrisburg | 5 across 320 miles |

Best Representation of Trails on Local Tourism Websites & Social Media

The tourism industry does not, as a whole, recognize trails as destinations. There is no “turnstile” or entry fee, making it difficult to track visitation and economic return (although the trails community is becoming more sophisticated in tracking and projecting use). And trail users traditionally have been thought to be a frugal audience, tent camping rather than putting “heads in beds.” This, of course, is changing. Trail users range from budget to high end travelers; related revenues are significant and have not yet peaked.

Some local tourism promotion agencies inherently value trails and outdoor recreation and recognize the benefit of promoting them. These agencies have been observed to best represent trails in their promotions:

Armstrong County Tourist Bureau

The homepage featured image is of a trail with the tag “Hit the trails,” which links to a trails page. There’s no question that trails are valued as assets worth promoting in Armstrong County. The trails page lists and describes area trails. Useful information such as mileage, surface, towns connected, and planned expansions is included. In addition to the trails page, there’s a page specific to trail associations. The Facebook and Twitter pages feature outdoor recreation in their cover photos.

Laurel Highlands Visitors Bureau

Trails, particularly the Great Allegheny Passage, are prominent on the site and in social media. Trails are used for the cover photo on both Facebook and Twitter. The organization's commitment to promoting the Great Allegheny Passage extends far beyond what is visible online. LHVB has a designated trail concierge who fields questions and fulfills requests for materials, and the annual visitors guide typically includes a feature on the trail. The organization has a history of partnering with CVBs from Pittsburgh to Washington, D.C. to market the trail.

Indiana County Tourist Bureau

One of the homepage slider images is of a trail. The Ghost Town Trail has its own page with a useful description (mileage, grade, surface, towns, etc.). The "Outdoor Recreation" page boasts of the 2011 Rails-to-Trails Conservancy sojourn coming through the county, a sign that the organization views its trails with pride.

Destination Cleveland

A compelling article within the site (["Run Bike Cle,"](#) July 15, 2015) highlights the Ohio & Erie Canal Towpath Trail and other top trails in the Cleveland metro area. The copy is written for the visitor and provides the kind of information that a visiting trail user would need (or, the kind of information that may compel visitors to hit the trails). It's written like a feature story as compared to standard trail language on a lot of other tourism sites. Other than this feature, it does not appear to be easy to find useful trail information.

Oil Region Alliance

Click on "Tourism" and you are taken to a stand-alone website, [www.grabtrails.com](#). The transition is seamless to the point that it seems you're still on the same site. This site is ALL trails with the tag "Grab life by the trails." The site includes great photos, seasonal content, and descriptions of area trails. It also includes trails of another sort: history trails, cultural trails, etc. Additionally, trails are featured as cover photos for both the Facebook and Instagram pages. The combination of the two sites ([www.oilregion.org](#) and [www.grabtrails.com](#)) could benefit from sharing tourism information beyond trails. (The "Tourism" link from the Oil Region site takes you to information on only one type of tourism – outdoor recreation.)

Experience Wheeling

Cyclists are shown twice in a short homepage promotional video. The Outdoors section has a "Trails and Trekking" page with nice detail on local trails, guided hikes, group rides, etc. (click "View all" to see this level of detail). The page says that information on bike shops and rentals will be added soon. When in the Outdoors section, scroll up and down the page to see the great

presentation (in blocks of photos) of all outdoor recreation. The trails page would benefit from additional information such as maps, trail grade, parking, etc.

Trumbull County Tourism Bureau

The Western Reserve Greenway is featured as one of the homepage slider images, along with the tag “Pedal our bike trails.” There’s also a biking page that describes the scenery, the routes, and how the local trail fits into a larger system (Great Ohio Lake-to-River Greenway). It’s enticing and also includes useful information (a map, total eventual mileage of the greenway, and that the greenway is still under construction in places).

Tourism Promotion “All-Stars” (Most Engaging Websites)

- **Destination Cleveland** – Great, modern website.
- **Greater Morgantown Convention and Visitors Bureau** - Modern website with content that changes seasonally (and in some cases, weekly). The homepage sliders focus on upcoming events and are very enticing.
- **Chautauqua County Visitors Bureau** - Compelling photos, seasonal messaging, trip planner feature.
- **Pennsylvania Great Outdoors Visitors Bureau** – Really nice, visually attractive site that emphasizes the outdoors.
- **Visit Steubenville and Jefferson County** - Generally nice website, neat presentation of events on homepage. News kept current. Active on Facebook.
- **Visit Wheeling** – Great, modern website.
- **Akron/Summit County Convention and Visitors Bureau** - Nice website other than the way that points of interest are listed. Flickr, Pinterest, YouTube accounts in addition to other social media.
- **Laurel Highlands Visitors Bureau** – Beautiful imagery, seasonal messaging, clean and modern homepage
- **VisitErie** - Site provides an information page for Canadian visitors.
- **Marion County Convention and Visitors Bureau** - Really nice site with compelling videos, active on social media.
- **Wetzel County Convention and Visitors Bureau** - Nice listing of communities, fairs and festivals and use of road routes to organize sightseeing opportunities. Not a dynamic site and no inclusion of outdoor recreation. No links to social media.

Trail User Demographics and Preferences

The Trail Town Program's 2015 General Trail User Survey provides current insight into the preferences of trail users, mainly rail-trail and canal trail users. Whereas past Trail Town Program surveys have focused on the Great Allegheny Passage, this survey was open to trail users reporting on their use of trails in general. The self-selected survey was taken by 804 trail users throughout the U.S. Respondents reported residences in 42 states and the District of Columbia, with the most responses from:

| | |
|--------------|-------|
| Pennsylvania | 39.8% |
| Indiana | 10.3% |
| Missouri | 5.8% |
| Maryland | 5.5% |
| Ohio | 5.3% |
| Florida | 4.1% |

Age Group and Frequency of Trail Use

The respondents were 61 percent male and 39 percent female, with the largest age groups represented ages 46-55 and 56-65, both representing 28 percent of survey takers.⁷ The majority of respondents use trails frequently. Over 60 percent use trails at least once a week. By comparison, only 26 percent of respondents to the 2008 Great Allegheny Passage (GAP) economic impact study survey report reported using the trail once a week or more. The wide gap in responses here may be because the GAP is a popular destination trail that draws a number of occasional trail users. Another possibility is that the 2015 survey was self-selected and drew the response of trail enthusiasts.

Note: For all of the following, survey respondents were able to "check all that apply," hence percentages do not add up to 100 percent.

Lodging

The most preferred types of lodging, as reported in the 2015 survey, are camping (47 percent), hotels (37 percent), and B&Bs (37 percent). For comparison purposes, the most frequently mentioned accommodations for the 2008 GAP survey were campgrounds (39 percent) and B&Bs (33 percent), followed by motel/hotel/hostel (22 percent).⁸

⁷ These same age groups represented 28 percent and 25 percent, respectively, of survey respondents in the 2008 Great Allegheny Passage Economic Impact Study trail user survey.

⁸ Another comparison can be made by looking at the 2012 GAP trail user survey. Among respondents that planned an overnight stay, the most frequently mentioned accommodations were campgrounds (29.6 percent) and/or bed and breakfasts (27.5 percent). Just more than one in eight (13.3 percent) mentioned a motel/hotel/hostel.

Staying Longer

The 2015 survey asked respondents, “What would encourage you to make longer trips (check all that apply)?” The most common responses were local shops, water recreation, and events. Museum and cultural sites ranked somewhat lower, and sight-seeing tours lowest.

Desired Services

When asked what types of services and amenities they were looking for, the most common were restaurant/café (81 percent) and public restrooms/water (80 percent). The next closest responses were lodging/camping (57 percent), bike shop (55 percent), tavern/bar/brewery (50 percent), and convenience store/grocery (47 percent).

The most commonly purchased items are beverages, meals, and ice cream/snack food. Only a

quarter of trail users reported purchasing equipment, rentals, or repairs while on trips; 27 percent had purchased clothing. About 80 percent of respondents reported that they typically purchase meals during trips. This is significant and supports the finding the most respondents are on trails for recreation purposes over exercise and commuting. The survey found that 81 percent of trail visitors use the trail for recreation, compared to 70 percent for health and fitness, and 13 percent for training, and 12 percent for commuting.



The Derailleur Bike Shop Cafe provides two needed services along the Butler Freeport Community Trail: food and bikes.

Respondents were also asked about food options that they most look for most often. Above all, trail users seek out local and regional favorites (65 percent) and locally grown or raised foods (58 percent). The next most important factor was home-style cooking at 47 percent. This supports general trends of travelers' desires to connect to and experience the places they visit.

Finding Services

When asked how they find business services and area attractions during trail trips, 84 percent of respondents reported that they look to the internet and social media; 52 percent rely upon word of mouth and local travel guides.

Audiences

A part of what propels the Industrial Heartland Trails Coalition forward is the touring possibility that a 1,450 mile connected trail network affords. A completed network will result in the longest system of dedicated trails in the United States, offering a compelling long-distance cycling adventure. This may always be a niche demographic, however important of one that it is. Those who thru-trek the system of trails represent the big dream of IHTC, while the vast majority of users will support the trail 20 miles, one overnight, or two burgers at a time.

Potential Audiences

Trail user audiences that contribute to the regional economy include:

- Long-distance (multi-day) cyclists, ranging from budget to comfort travelers
- Overnight visitors,⁹ likely biking two days on a single trail or visiting multiple trails in hub-and-spoke fashion
- Regional day-trippers who tend to spend less than overnight visitors and more than local trail users, at least relevant to the Great Allegheny Passage¹⁰
- Local cyclists out for a ride
- Trail event participants (rides, walks, hikes)
- Mountain bikers
- Hikers
- Water trail users
- Equestrians
- Cross-country skiers
- Multi-recreational audiences participating in more than one type of outdoor recreation in a single trip



⁹ The Adventure Cycling Association, while focused on road cycling, considers bike overnight trips a “gateway” to more extensive bicycle touring.

¹⁰ Intra-regional travelers make up a significant number of visitors to this region (many who fit the “Visiting Friends and Relatives,” or “VFR” mold and may be looking for activities during such visits). Visit PA’s 2011 Economic Impact of Travel report, found that the main origin states to southwestern Pennsylvania for overnight leisure trips were Pennsylvania, Ohio, and New York (all IHTC states).

Tourism Readiness & Appeal

Corridor Completion Rate

As of January 2016, the IHTC system is believed to be 48 percent complete, with a completion goal of 2033. Tourism readiness varies by corridor, in part due to trail completion status, and also as a result of the availability and quality of nearby visitor services. The following table demonstrates open trail miles per corridor. The quality of visitor services and general tourism readiness are less tangible.

Open Trail Miles per IHTC Corridor

| Corridor | Trail Miles ¹¹ | Percent of Total |
|--------------------------------------|---------------------------|------------------|
| Cleveland to Erie | 29.8 | 31% |
| Erie to Pittsburgh | 116.9 | 45% |
| Parkersburg to Pittsburgh (P2P) Link | 185.0 | 55% |
| PA Wild Wild West Route | 41.9 | 68% |
| PA Wilds Connector | 44.7 | 26% |
| Pittsburgh to Ashtabula | 78.8 | 53% |
| Pittsburgh to Cleveland | 137.5 | 57% |
| Pittsburgh to Harrisburg | 64.7 | 47% |
| TOTAL | 699.2 | 48% |

Survey Findings

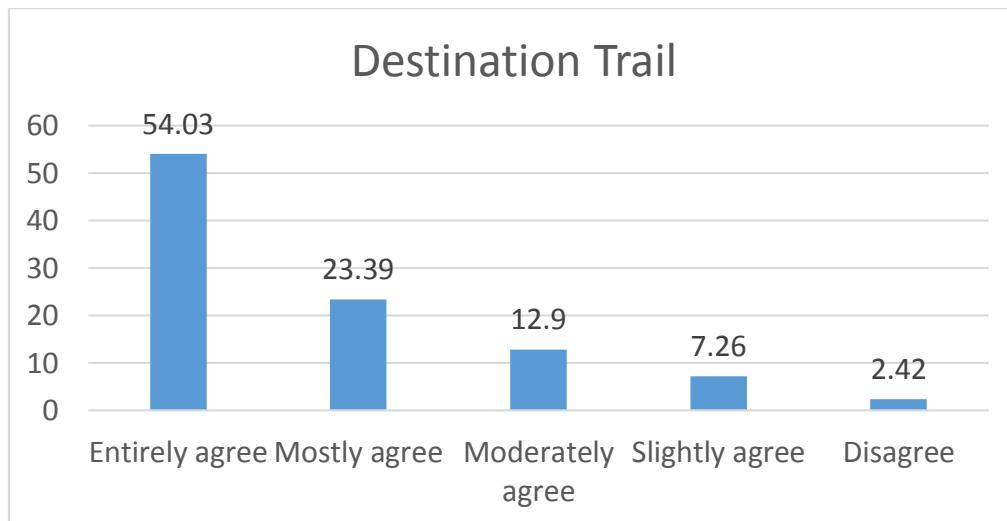
While caution should be used in interpreting trail segment (corridor) results given the small sample sizes of the Partner and Stakeholder surveys, they do provide insight into perceptions around trails and tourism. These are some of the highlights from the Stakeholder survey, with 159 respondents in all:

In general, respondents indicated that their segment was “slightly” to “moderately” ready for visitors (73 percent). Those who thought their segment was “extremely ready” matched those who thought their segment was “not at all ready” (7.38 percent each).

¹¹ This table represents completed trail miles for each corridor as reflected in the Go to Trails database. The mileage figures do not include open miles that have not been reported to IHTC staff. The table, therefore, may show fewer completed miles than what actually exists. The coalition is working to systematize collection of such information.



Regardless of perceived readiness and across all corridors, a majority of respondents (77 percent) "mostly" or "entirely" agree that their trail is a worthy destination or will be upon completion.



Regardless of segment, a majority of respondents agree that their trail would appeal to tourists and that the entire IHTC network would as well:

"International and other non-local visitors would visit and appreciate my trail corridor."

| | Entirely agree | Mostly agree | Moderately agree | Slightly agree | Disagree | # responses |
|--------------------|----------------|--------------|------------------|----------------|----------|-------------|
| CLE to Erie | 31% | 38% | 15% | 15% | 0% | 13 |
| Erie to PIT | 27% | 47% | 13% | 13% | 0% | 26 |
| Park to PIT | 50% | 50% | 0% | 0% | 0% | 15 |
| PA Wilds Connector | 50% | 50% | 0% | 0% | 0% | 2 |
| PA Wild Wild West | 50% | 50% | 0% | 0% | 0% | 8 |
| PIT to ASH | 50% | 13% | 25% | 13% | 0% | 16 |
| PIT to CLE | 36% | 50% | 7% | 0% | 7% | 14 |
| PIT to Harrisburg | 0% | 60% | 40% | 0% | 0% | 5 |
| Total | 36% | 38% | 17% | 7% | 1% | 99 |

Respondents were less optimistic that their local visitor bureau understands, values, and promotes trail tourism (46 percent entirely or mostly agreed with the following statement):

"My local visitor bureau understands trail tourism and values and promotes the local trail system."

| | Entirely agree | Mostly agree | Moderately agree | Slightly agree | Disagree | # responses |
|--------------------|----------------|--------------|------------------|----------------|----------|-------------|
| CLE to Erie | 31% | 8% | 31% | 31% | 0% | 13 |
| Erie to PIT | 23% | 23% | 35% | 15% | 4% | 26 |
| Park to PIT | 13% | 33% | 33% | 7% | 13% | 15 |
| PA Wilds Connector | 0% | 50% | 0% | 0% | 50% | 2 |
| PA Wild Wild West | 50% | 25% | 0% | 25% | 0% | 8 |
| PIT to ASH | 19% | 19% | 13% | 44% | 6% | 16 |
| PIT to CLE | 7% | 36% | 50% | 7% | 0% | 14 |
| PIT to Harrisburg | 20% | 40% | 20% | 20% | 0% | 5 |
| Total | 21% | 25% | 28% | 20% | 5% | 99 |

Small businesses adapting to the needs of visitors appears to be an area of concern. Respondents were asked to indicate how much they agree with two statements relating to small business services. The first was whether or not they provide *acceptable* services and products to visiting trail users. The second was whether or not they provide *exceptional* services and products. The response varied regarding acceptable services (33 percent entirely or mostly agreed that local businesses meet this standard); even fewer (28 percent) thought that businesses in their area provided exceptional services.

"Small businesses in my area provide acceptable services and products to visiting trail users."

| | Entirely agree | Mostly agree | Moderately agree | Slightly agree | Disagree | # responses |
|--------------------|----------------|--------------|------------------|----------------|----------|-------------|
| CLE to Erie | 8% | 15% | 46% | 31% | 0% | 13 |
| Erie to PIT | 0% | 23% | 42% | 35% | 0% | 26 |
| Park to PIT | 13% | 33% | 33% | 7% | 13% | 15 |
| PA Wilds Connector | 0% | 50% | 0% | 50% | 0% | 2 |
| PA Wild Wild West | 13% | 13% | 25% | 38% | 13% | 8 |
| PIT to ASH | 13% | 31% | 19% | 13% | 25% | 16 |
| PIT to CLE | 14% | 36% | 21% | 29% | 0% | 14 |
| PIT to Harrisburg | 0% | 0% | 40% | 20% | 40% | 5 |
| Total | 8% | 25% | 32% | 25% | 9% | 99 |

"Small businesses in my area provide exceptional services and products to visiting trail users."

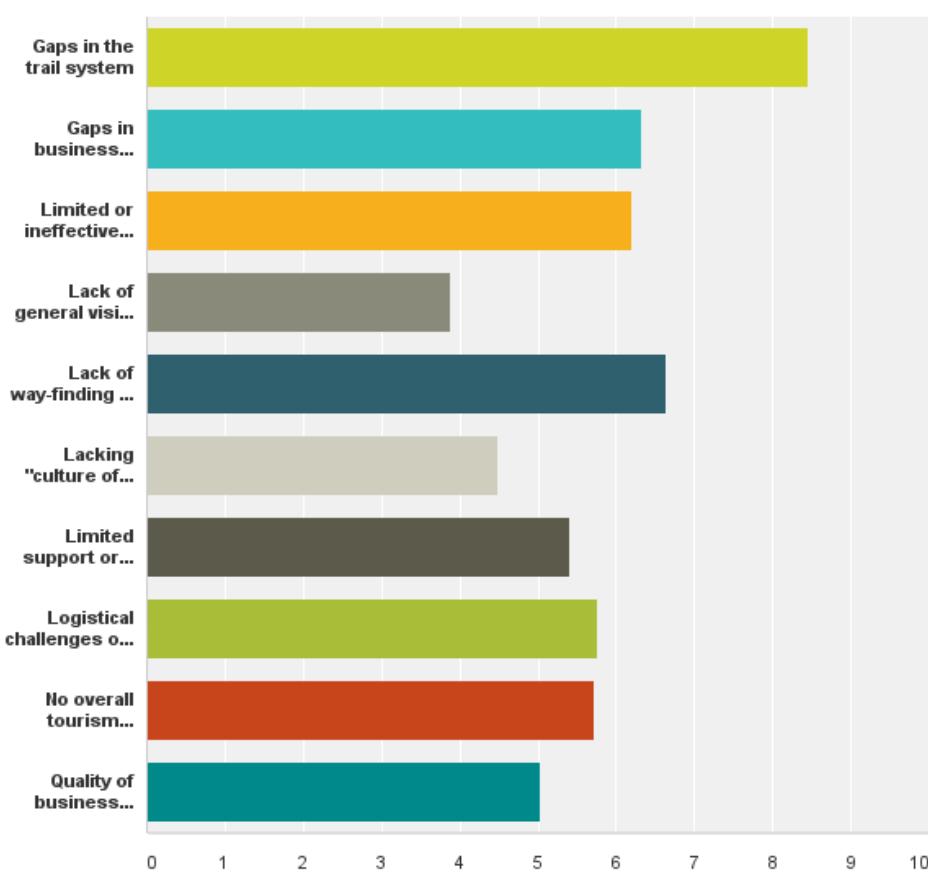
| | Entirely agree | Mostly agree | Moderately agree | Slightly agree | Disagree | # responses |
|--------------------|----------------|--------------|------------------|----------------|----------|-------------|
| CLE to Erie | 15% | 15% | 46% | 15% | 8% | 13 |
| Erie to PIT | 0% | 28% | 16% | 32% | 24% | 25 |
| Park to PIT | 7% | 27% | 33% | 13% | 20% | 15 |
| PA Wilds Connector | 0% | 50% | 0% | 0% | 50% | 2 |
| PA Wild Wild West | 13% | 13% | 38% | 0% | 38% | 8 |
| PIT to ASH | 19% | 6% | 19% | 19% | 38% | 16 |
| PIT to CLE | 14% | 21% | 29% | 21% | 14% | 14 |
| PIT to Harrisburg | 0% | 0% | 0% | 60% | 40% | 5 |
| Total | 9% | 19% | 26% | 21% | 24% | 98 |

Barriers to Success

Survey participants were queried on perceived barriers to successfully attracting trail visitors. Stakeholders and Partners responded similarly, with "gaps in the trail system" as the top barrier. Other frequently mentioned challenges included (2) lack of way-finding / community connectivity to the trail, (3) gaps in business services, and (4) limited or ineffective marketing. Among the other challenges: logistical challenges of planning a trip, limited support or understanding of trail tourism by local tourism promotion agencies, no overall tourism attraction strategy in place, quality of business services / attractions, the area lacking a "culture of hospitality," and lack of general visitor appeal / nothing "special" about the area.

Caution: Some respondents had difficulty answering this question, which required them to rank the challenges ("1" representing the most significant challenge, and "10" the least). The four most named challenges, both by Partners and Stakeholders, appeared in the top half of the list (which may have impacted the response).

Perceived Barriers to Attracting Trail Visitors¹²



Observed Differences between the Partner and Stakeholder Surveys

IHTC Partners and Stakeholders responded similarly in most regards. There were two places where the differences in their responses were notable, including:

1. Stakeholders were more likely to perceive area residents to feel connected to their local trail systems (37 percent “entirely” or “mostly” agreed with a statement to this effect versus 23 percent of partners). It is promising that trail and community advocates at the local level perceive their neighbors to value trails, although there is much work to be done.
2. Stakeholders view the quality of business services more positively than IHTC partners. When asked how much they agree with the statement “Small businesses in my area provide acceptable services and products to visiting trail users,” 34 percent of Stakeholders and 20 percent of Partners either “entirely” or “mostly” agreed.

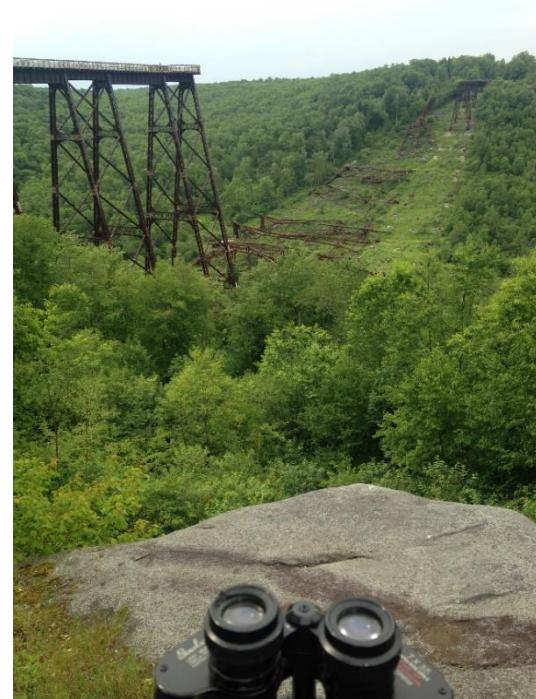
¹² This table is from the Stakeholder survey results. The Partners’ top four (denoted above) were selected more uniformly than the other six challenges (i.e., those four challenges stood out from all others).

Destination Appeal

The vast majority of IHTC Partners and Stakeholders surveyed in 2015 believe that their respective trail corridor has destination appeal. When queried on the topic, 79 percent of Partners and 77 percent of Stakeholders responded that they either “entirely” or “mostly” agree that their corridor holds destination potential.¹³

But what does it mean to have destination appeal or to be a “destination trail”? The Atlantic Canada Trails Association (ACTA)¹⁴ has dedicated considerable resources to defining and encouraging destination trails. Here are a few guidelines:

- Most simply, a destination trail is one that people are willing to travel a considerable distance to use. ACTA’s consulting team maintains that people should be willing to travel 90 minutes or more to use the trail for it to be a true destination.
- The trail should also have “lure.” The lure may include authentic communities, natural features like waterfalls or scenic vistas, man-made features like tunnels and viaducts, and other “wow” factors. The natural features might lead to a “profound” experience. The “wow” may involve the quirkiness of small towns or outstanding architecture of big cities.
The lure is what motivates people to visit the trail in a competitive marketplace in which there are so many trails to choose from (there are nearly 2,000 rail-trails in the U.S. alone).
- A destination trail leaves lasting impressions. People go out of their way to get to the trail and never forget the experience. Despite so many trails being available elsewhere, the trail will propagate itself in the marketplace.
- A destination trail should have a brand, theme, or narrative that is consistent with the attributes of the region.



The Kinzua Bridge - a destination with lure

¹³ Survey respondents were asked to indicate how much they agree with the statement “My trail corridor is a destination trail or has the ability to be upon completion.” Across all corridors, destination appeal (and potential) was noted regardless of present day tourism readiness.

¹⁴ ACTA has a mandate of developing and marketing high quality trail experiences that will help to position Atlantic Canada as a recreation and tourism destination. Participating provinces include Nova Scotia, New Brunswick, Prince Edward Island, and Newfoundland and Labrador.

The “Essentials” of Destination Trails

Another way of viewing destination trail potential is through this list by Canadian firm Forerunner Consulting and Tourism Strategies. The essentials:

- Well-themed
- Sense of place
- Natural assets
- Accessibility
- Educational
- Achievement and joy
- Physically rewarding
- Support services
- Elements of surprise
- The “indelible moment”

As for ACTA, to fulfill its mandate of developing and marketing high quality trail experiences, the group developed a **destination trail assessment tool**. The purpose of the tool is to evaluate the tourism potential of trails in Atlantic Canada through a comprehensive assessment of trail experience, infrastructure, amenities and supporting components. Trails that score positively are deemed “destination trails.” Trails that do not are provided guidance on how to improve their destination appeal.

The assessment tool evaluates the following elements:

- **Pre-trip:** website, finding the trail
- **Access Points:** parking, entry signs
- **On the Trail:** trail navigation, trail conditions
- **Trail Design:** trail route and alignment, conservation, safety, interpretation
- **Trail Experience:** general, natural, cultural
- **Tourism Services and Amenities:** tourism services, access to communities, tours, transportation, restrooms, trash and recycling receptacles

An interesting item of note from the ACTA destination assessments: more than 30 trails across four provinces have been assessed. Of the 11 certified destination trails, only one is a rail-trail. This appears to have been the by-product of the viewpoint that rail-trails are straight and uninteresting. What they may lack in adventure experience, however, they can make up in scenic views and cultural and heritage experiences. Additionally, “adventure” is in the eye of the seeker. For some, a 500, 100, or even 10-mile straight and narrow trail experience “on your own power”

constitutes adventure. Furthermore, the rail-trail demographic spends significantly, meeting one of the highest goals of a regional trail network, which is economic impact.

Attractions Inventory

Sites per Corridor

| Corridor | Number of Attractions Identified | Number of Survey Participants* | Most Named Attractions |
|--------------------------|---|--------------------------------|--|
| Cleveland – Erie | 28 | 18 | Lake Erie, Downtown Cleveland, Ashtabula Harbor & lift bridge |
| Erie – Pittsburgh | 103 | 47 | Drake Well Museum, Lake Erie, Allegheny River, Oil Creek / Presque Isle / Point State Parks, Oil Creek & Titusville RR |
| Parkersburg – Pittsburgh | 72 | 31 | Prickett's Fort SP, Downtown Morgantown, Dunbar coke ovens, Downtown Fairmont |
| PA Wilds Connector | 7 | 3 | No repeat mentions |
| PA Wild, Wild West | 10 (plus a number of general attractions) | 13 | Clarion River, "wildlife," Allegheny National Forest, Downtown Ridgeway |
| Pittsburgh – Ashtabula | 55 | 21 | Lake Erie, Mosquito Lake SP, Ohio Wine Country, Hubbard House Underground RR Museum, Mill Creek MetroParks, Ohio River |
| Pittsburgh – Cleveland | 51 | 27 | Cuyahoga Valley NP, Downtown Cleveland, Historic Zoar Village |
| Pittsburgh – Harrisburg | 24 | 11 | Roaring Run Recreation Area, Packsaddle Gap |

*The number of survey participants per corridor does not reflect number of respondents that provided text responses naming attractions in their corridor. (Many participants chose not to answer questions pertaining to specific sites).

Interpreting the Attractions Inventory

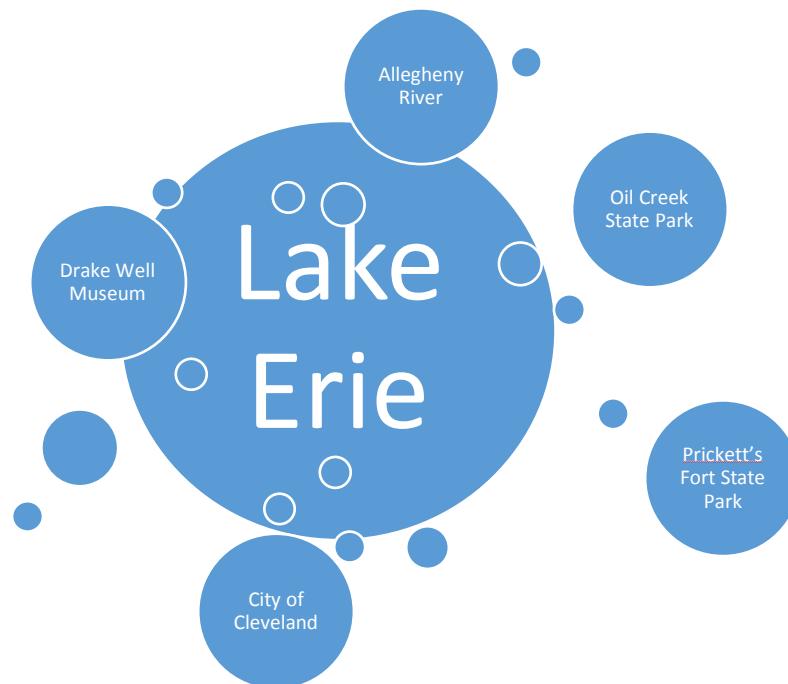
- There is a correlation between the number of attractions identified per corridor and the number of people who completed the survey in the corridor. Generally, the fewer people who completed the survey, the fewer attractions are listed. This does not reflect, necessarily, the overall tourism appeal of a corridor. Rather, it mirrors the level of participation in the survey process.

- Participation rates tend to correlate with whether or not there is an established Corridor Working Group in place. In general, those corridors that have working groups generated the most response.
- The most named attractions across the entire IHTC project area may have been named so frequently due to either their popularity or to the fact that they are located along multiple corridors (Lake Erie, for example, touches four corridors; and Pittsburgh is the terminus of three corridors).
- Another notable trend: frequency of mentions does not necessarily correlate with actual visitation. For example, the Drake Well Museum in Titusville, PA was named 15 times, while the Rock 'n Roll Hall of Fame was mentioned just five times, and the Chautauqua Institution just twice (those sites receive considerably more visitors than the museum).
- The inventory reflects the interests, values, and general awareness of trail advocates and other stakeholders who took the survey. IHTC partners must work together moving forward to assess existing and potential visitor audiences and sites that may appeal to them. Audience interests may vary from stakeholders' perceptions of points of interest.

Themes and Opportunities Observed via the Attractions Inventory

The attractions inventory includes 350 specific sites generated from the Partner and Stakeholder surveys as well as additional draws or attractions that are more general. Refer back to the Methodology section of this strategy for additional information concerning the inventory.

Certainly, there were sites that were named multiple times. Lake Erie, for example, was mentioned 29 times across 4 corridors. Other frequently named sites are shown in the following graphic. All of these were mentioned 8-15 times.



How many times a site was mentioned may be a reflection of survey participation rates (per corridor), the site's popularity, the density of sites in a particular area (some well-visited sites probably would have been mentioned more often if not in dense urban areas where there were many sites to name), and various other factors. In any case, the inventory provides rich insight into "beyond the trail" attractions in each corridor. Some sites and themes that particularly resonate are:

- Lakes and rivers
- State parks
- Eating and drinking experiences
- Downtown areas (urban cores, small towns, rural villages)
- Wildlife and scenic views
- National parks and forests
- Cultural and historic sites (the latter leaning industrial)

The inventory as well as the listing of experiential opportunities (see Recommendations) provide a treasure trove of opportunities to provide trail visitors with richer, more immersive experiences that benefit the regional economy. These opportunities can be fostered through development of itineraries and trip packages.

Tourism Strategy Recommendations

The following near-term and long-term tactics are suggested in order to position the region's trail corridors as a recreation and tourism destination. It should be noted that the recommendations are based on Partner and Stakeholder survey findings and the consultant's recommendations and not a larger body of research specific to the corridor.

While many of these are future or ongoing recommendations to be led by coalition leadership, some can be completed or developed by corridor working groups as part of an annual work plan or working group session.

- Continue to Advocate for Trail Funding, Construction, and Maintenance
- Advocate for Increased Tourism Support at the State Level
- Decide When to Promote
- Assess the Trail Corridors for Tourism Readiness and Appeal
- Actively Push for Needed Improvements
- Build from the IHTC Brand Foundation
- Identify and Target Trail User Audiences
- Engage and Partner with Local Tourism Entities
- Market Partner Trails prior to Promoting IHTC
- Facilitate and Encourage Experiential Travel
- Re-evaluate the Coalition's Tourism Strategy and Tactics

Each is detailed in the following pages.

Continue to Advocate for Trail Funding, Construction, and Maintenance

IHTC project partners and stakeholders agree that gaps in the trail system create the most significant barrier to successfully attracting visiting trail users (see page 22 for details). This holds especially true in attracting long-distance touring cyclists who may eventually bike from trail to trail. The system at present is 48 percent complete, with individual corridors ranging from 31-68 percent. Continuing to prioritize trail development and advocating for enhanced public and private support is the most important action that IHTC can take that will ultimately increase trail tourism. While the focus here is in advocating for increased and more flexible funding, the coalition can also play a role in rallying the region around a common vision of a 1,450 mile connected network. After all, a region that is enthusiastic about trails results in ready-made ambassadors.¹⁵

¹⁵ Not to be overlooked in an area where a large number of visitors are part of the "Visiting Friends and Relatives (VFR)" market seeking experiences combined with their visits.

Advocate for Increased Tourism Support at the State Level

The current level of statewide tourism investment (see page 10 for details), particularly relative to Ohio and Pennsylvania, is an impediment to promoting outdoor recreation in a competitive fashion. (This is not the case concerning New York's investment. The state's iconic "I Love NY" campaign, in existence since 1977, is matched with significant investment through the state's tourism office, an arm of the New York Department of Economic Development.)

The coalition should support the tourism community in seeking increases in allocated state funding. The Ohio Travel Association, Pennsylvania Travel & Tourism Association and PA Tourism Partnership are examples of entities that IHTC may want to connect with to offer support.

Beyond this, when ready, the coalition should work with statewide associations, state tourism agencies, and local tourism promotion agencies to inform them of IHTC's bold vision and the benefits of long-distance trails as well as to seek their active promotional support.

Decide when to Promote

Marketing a system prior to having a viable product (in this case, significant contiguous miles and relevant business services available) may jeopardize the long-term success of promoting IHTC trails. The coalition is in the position to either begin promotion of the trail system or to delay such promotion.

One of the most visible examples of a high-profile, much-anticipated, long-distance trail is the Great Allegheny Passage (GAP). The trail was built in segments over more than three decades, and once named, trail users began to clamor for information as well as for trail completion. The Allegheny Trail Alliance formed in 1995 with a goal of uniting trail organizations to complete the "Pittsburgh to Cumberland" trail. The trail was named six years later, in 2001, and marketing began still later that year. (Promoting the trail in earnest began when 100 contiguous miles of trail was complete in the summer of 2001.) This represented two-thirds of the trail corridor.

Much has changed in the 15 years since the Allegheny Trail Alliance began marketing the GAP. But what can be learned from their attempts to manage trail user expectations? There is now less ability to "control" the message, particularly given that the IHTC name is being used regionally to garner the support of funders and other decision makers and there is already an electronic presence (the www.ihearttrails.org website and the IHTC Facebook group with 150 followers), not to mention "word of mouth" being one of the best promotional tools for trails.

A Possible Model

If following the GAP's model of not promoting the trail system until two-thirds of contiguous trail is open, promotion may not happen for another six or seven years. (The system is presently 48 percent complete with 700 miles open and another 750 miles to build. The two-thirds mark would be reached at roughly 1,000 miles. Trail organizations need to build an average of 44 miles a year, overall, in order to complete the 1,450 mile system by 2033. Using this yearly construction target, one might estimate that the 1,000 mile mark could be reached by 2022-23.) This is not to suggest that trail development will take place at this pace or that the miles constructed over the next decade will result in 1,000 *contiguous* miles. It is rather a way of quantifying the possibilities in addressing the question of when to promote the system as a visitor amenity.

Ultimately, IHTC partners must determine when there is enough of a product to promote IHTC trails (measures other than the GAP's two-thirds contiguous miles may be developed)¹⁶ and take steps to prepare the region for increased trail tourism in the interim. Some such steps are described below.

Assess the Trail Corridors for Tourism Readiness and Destination Appeal

Much like is done in Atlantic Canada, it would benefit the IHTC coalition and its members to consider the value of assessing the trails individually. The region is already in the habit of assessing trail communities through the existing Trail Town Self-Assessment. Taking the next step of rating trails and their destination appeal would provide an opportunity to better understand the product (the trails) and opportunities for improvement.

Even though the IHTC corridors are essentially established and trails do not need to qualify for destination status, consideration ought to be given to questions of trail quality and destination appeal with the intent to improve both. What are the themes of the trails and what takeaways would a visiting trail user have in visiting? What is the story of this region, and what are the variations within? How well do local communities and businesses serve visiting trail users? Such conversations around elevating IHTC trails and the tourism product are all the more important in a competitive marketplace that includes nearly 2,000 domestic rail-trails. What sets IHTC trails apart is the question that must be answered.

¹⁶ Two-thirds contiguous miles may have been more important in the case of the GAP given the smaller number of miles. Marketing prior to that milestone would have meant marketing a trail experience not long enough for multi-day trips. The IHTC system may be able to market substantive experiences well before reaching 1,000 contiguous miles.

Consider and Foster Destination Appeal Beyond the Trail

The coalition must also remember not to narrowly define destination appeal by the trail experience. If one measure of a destination trail is that people are willing to drive at least 90 minutes to reach it, another is that there is enough to do that the visitor can recreate at least twice the time it takes to reach the area.¹⁷ More or less, the combination of trail time and other “time out of the car” should be greater than the time spent in transport. For the shorter trail segments, packaging visitor experiences that are not limited to time spent on the trail could help in establishing trail-centered destinations.

Actively Push for Needed Improvements

After “Gaps in the trail system,” the top barriers to attracting visitors, as is identified both in the Partner and Stakeholder surveys, were:

- Lack of way-finding
- Gaps in business services
- Limited or ineffective marketing

These were identified from among 10 potential barriers. All 10 options present some level of obstacle, but these four (including “gaps in the trail system”) were uniformly the most significant as reported by survey respondents. IHTC can and should play a role in better understanding these challenges and in addressing them. A part of understanding these challenges is to vet them. As mentioned on page 22, there may have been confusion on the part of survey respondents in answering these questions. Corridor working group meetings would be an ideal setting to further discuss these barriers and potential solutions. All of these challenges should be approached through the lens of encouraging connectivity and a culture of hospitality.

Build from the IHTC Brand Foundation

The work done in 2014-15 to rename the trail coalition provides some direction concerning how to position the trails to visiting trail users. At the time, IHTC (then P32+) partners had identified visiting and local trail users as *long-term* audiences. Neither group was included as a near-term audience, which supports the recommendation to delay promotion of IHTC as a visitor offering (instead, investing any interim tourism promotion efforts on marketing individual trails). Despite

¹⁷ IMBA Trail Solutions guideline on building destination trails

the intent to delay marketing of the whole, the 2014-15 branding process provides a foundation from which to build. Some of the highlights of the branding process follow.

The Coalition's Core Belief

The consulting team Studio Graphique worked with coalition partners to get to the heart of why the coalition exists. While at the surface the coalition exists to facilitate completing and connecting long-distance trails for economic and other benefits to the region, there is a more basic core belief that drives the coalition, articulated as such: *"To provide an accessible and enjoyable trail experience for anyone to intimately explore and appreciate this region."*¹⁸

IHTC Positioning Statement

The Industrial Heartland Trail Coalition will offer an accessible, connected network of trails between numerous destinations in its four state footprint, for anyone to explore and discover the region's beauty, diversity, history and culture in an unparalleled experience.

Distinctiveness of the Region

The branding process included identifying distinctive features of the region and its trails. While the region's general characteristics were considered in branding discussions, the intent is to brand the trail experience, not to re-brand the region.¹⁹ Things that make this trail network unique compared to other systems:

- Region-specific history, scenery, and spirit
- Industrial past/heritage/history
- Shape: branched and interconnected rather than a long span rail trail and canal history
- Connector of regional cities and destinations (connecting dots)
- It's about the places in between the destinations as much as the destinations themselves

¹⁸ The basis for this exercise of articulating the “why” (or core belief) is Simon Sinek’s “The Power of Why,” which suggests that the most successful brands and initiatives articulate why something matters, rather than simply stating the “what” and the “how.”

¹⁹ In fact, this four-state area has not ever previously been considered a “region.”

One-word descriptions of the region:

| | | | |
|------------------|------------------|---------------|--------------------|
| Rivers | Ohio valley | Frontier | Blue collar |
| Transition | Remade | Big | Connections |
| Industry | Nature | Scenic | Steel |
| Welcoming | Connectivity | Potential | Vast |
| Diverse | Collaborative | Regenerative | Resurgent |
| Multifaceted | Expansive | Crossroads | Resourceful |

About the Name

The exercises and results described above contributed to the naming of the Industrial Heartland Trails Coalition. The name was ultimately selected as an homage to the industrial heritage of the region as well as its approachable, welcoming character, reminiscent of the “heartland.” Thus, “Heartland” takes on two meanings, expressing that this region was once at the center of industry and also resembles the country’s heartland in the way of approachability. The decision to include “industrial” in the name results in a name that is honest about the sites that will be encountered. It’s a way of embracing the signs of industry that exists along the trails.

Coalition Name v. Network Name

It should also be noted, that the coalition expressly chose to name the coalition as opposed to naming the network. (The implications of naming the network were considered too risky and long-lasting so early in the life of the project.) **As the coalition prepares to market the collection of trails as a whole, it will become necessary to reconsider the regional brand.** Will the system of trails become known as the “Industrial Heartland Trails Network” brought together by the Industrial Heartland Trails Coalition, or will another name become necessary?

Potential Themes

In building from the brand foundation, the coalition must also consider themes that exist across the project area. The geographic area is so large that some themes will resonate only in certain areas. The Partner Survey queried IHTC partners on themes that trail users might encounter when visiting their respective corridors. These themes and how well the partners thought they fit were:

- A "natural" location for innovation & industry: how geography and natural resources contributed to the industrial revolution (resonated with 88 percent)

- Reclaiming our river valleys, seaways, and natural areas for the good of all (71 percent)
- A rich culture and heritage: it's the people and traditions that make the place (71 percent)
- "Town and country" - trails connecting people to communities large and small (53 percent)
- Appalachian roots and traditions, modern day homesteading, and local foods and agriculture (47 percent)

Others offered by the partners include:

- Unique shore experience on the Great Lakes
- Finding level ground in mountain country
- A variety of habitats, natural resources, small towns, cities and industrial sites

Identify and Target Trail User Audiences

There are so many potential audiences with a range of travel tendencies: locals or visitors; long-distance cyclists or day trippers; multi-recreationalists or single sport enthusiasts; “all trail” or trails as part of a more immersive visit. Types of trail users are identified on page 18 through the lens of preferred trail use and trip length. For each of these, there is a broad range of users ranging from budget to comfort travelers. Exploring these audiences in relation to tourism and economic impact goals, as well as which audiences constitute the majority of existing and potential trail users, will be necessary for the coalition to move forward with marketing.

The coalition may look to how the National Scenic Trails address marketing to local and visiting trail users. The Appalachian Trail has become the most iconic footpath in the country for the possibility that it holds for people to walk over 2,000 miles. This is what makes the trail iconic, and yet thru-trekkers make up only one percent of trail users. In the case of IHTC, it is quite possible that the “big dream” (biking 1,450 contiguous miles) may be what enables the system to build its name and reputation. That said, all other audiences (the vast majority of those on IHTC partner trails) need to be wooed as well.

The North Country Scenic Trail provides an example of a long-distance trail that is now focusing its marketing on day and section hikers with its “100 Mile” campaign (encouraging people to sign up to complete 100 miles throughout 2016). There are a number of different audiences to which the IHTC trails will appeal (and already do). Better understanding these audiences and how best to reach them will become of utmost importance in marketing the IHTC experience.

Engage and Partner with Local Tourism Entities

There are 38 local and regional tourism entities whose missions stand to benefit IHTC trails. Some of these are already doing a great job of promoting trails and outdoor recreation. Others can do better. IHTC can play a role in educating the TPAs on the benefits of trails, the compelling IHTC vision, and how trail trips can incorporate other sites and activities appealing to audiences at every price point.

The coalition should articulate its needs of the tourism community as well as how trails can benefit local TPAs.

Ways that the local tourism community can assist the coalition and trails:

- Partnering on tourism readiness assessments
- Actively investing in trails and promoting them to visitors
- Offering hospitality and other trainings intended to strengthen the service industry
- Offering such trainings to the trail industry – visitor centers, trail stewards, etc.

Ways that trails can benefit the local tourism community:

- Offering a viable and trending product that generates economic benefit and connects rural and urban destinations
- Slowing the rate of travel, particularly among self-supported cyclists, resulting in extended visits that venture off the interstate
- Introducing trail users to attractions “beyond the trail”
- Creatively and intentionally connecting visitor attractions along linear trails

Before engaging the tourism community, the coalition must determine when it would like to begin those conversations and how to manage the message around IHTC. It is important that the TPAs do not begin promoting IHTC as a product until the coalition is ready for that level of marketing.

Market Member Trails in Advance of Promoting the Larger System

There is much that can be done prior to marketing IHTC as a whole. Steps to improve the tourism product and to foster a culture of hospitality have already been articulated. The coalition may also choose to offer assistance in marketing the individual trails to visitors. This can be done without the IHTC name attached to any of the efforts and provide the coalition the opportunity to test various promotional tactics. Two opportunities that have been discussed in the past include building and recommending trip itineraries and developing trip packages that can be sold and evaluated for effectiveness. These and other efforts could be directed by the themes that have emerged in the Attractions Inventory and as well as the 2015 surveys.

Facilitate and Encourage Experiential Travel

One definition of “experiential travel” is “learning something by doing something with someone who lives there.” One of the major trends in tourism is fostering experiential travel that immerses visitors in a place. Visitors desire the ability to connect with residents, understand local culture and heritage, and to create lasting memories.

Trail users who are traveling at a slower, more relaxed rate than typical tourists may especially enjoy the opportunity to connect in this manner. For this reason, the Partner and Stakeholder surveys included questions around themes that may be interpreted along the corridors and possible experiential activities.

Experiential Activities

Survey participants were asked, “What are some existing or unrealized opportunities to connect visiting trail users with local residents and experts for a memorable experience?” We received more than 200 responses ranging from generic ideas to names of actual sites and individuals that may be positioned to offer engaging off-trail experiences.

Some of these are shown on the following page.



Straub Brewery tour goers smell the hops, taste the beer, and get a close up of the entire brewing process.

Possible (and Existing) Experiential Activities

| | | |
|--|--|---|
| Cleveland to Erie Brewing beer Fly fishing Grape stomping Food and wine pairings Sailing on Lake Erie | Erie to Pittsburgh Agricultural & “foodie” tours Alpaca care Trail work with local volunteers (volunteer travel) Making duck decoys Trailside “Wine and dines” Segway tours Underground Railroad tours Bald Eagle kayak tours | Parkersburg to Pittsburgh Making pepperoni rolls Glass blowing & marble-making Wild food foraging Bluegrass lessons Basket weaving Quilting |
| PA Wild Wild West Guided elk viewing Eco-tours Historic bike tours PA Wilds Artisan Trail CCC camp tours |  The logo features a red gear with a white heart shape inside it. To the right of the gear, the words "Industrial Heartland Trails" are written in a stylized font, with "Industrial" and "Trails" in red and "Heartland" in white. Below that, the word "COALITION" is written in a smaller, black, sans-serif font. Industrial Heartland Trails COALITION | Pittsburgh to Cleveland Canal boat rides Glass blowing Farm tours Winery tours Brewery tours Ranger-led hikes Visiting local markets & festivals Blacksmithing workshops |
| PA Wilds Connector John Johnson home tours NatureVation outdoor tours Portage Native camp visits | Pittsburgh to Ashtabula Lake Erie chartered fishing Airstream camping Covered bridge tours Herb Garden School of Cooking Underground Railroad tours Farm stays Old Economy Village tours | Pittsburgh to Harrisburg Ethnic festivals Johnstown Flood heritage Laurel Highlands Native American Gathering |

Some of the ideas that emerged in most every corridor:

- History and architecture tours
- Agricultural tours and farm stays
- Beer and wine experiences
- Outdoor adventures ranging from sailing to Bald Eagle tours
- Art and culture experiences through the arts and festivals

Themes begin to emerge in viewing some of the experiential responses by corridor. Parkersburg to Pittsburgh includes some Appalachian customs and foodways. The corridors along and near Lake Erie reflect a Great Lakes region that includes flat, agriculture land, vineyards and breweries, and water recreation.

The coalition should remain aware of the richness that immersive experiences bring to trips. In developing itineraries and packages, and in working with the tourism community, the coalition should keep pushing for these rich, immersive experiences, ones that can set trail trips to this region apart from those experienced elsewhere while also significantly increasing the economic reach and potential of trails.

Re-evaluate the Coalition's Tourism Strategy and Tactics

This strategy is an early attempt at understanding the IHTC “tourism universe,” tourism readiness, and opportunities to engage in tourism. The tourism and hospitality industry is ever changing, as is the landscape of trails. This strategy should be re-evaluated and specific tactics determined as the coalition progresses toward its goal of a completed system.

Sources Referenced

- Atlantic Canada Trails Destination Trail Assessment Tool
- IHTC Brand Discovery Notes Document (Studio Graphique for IHTC, Sept. 2014)
- IHTC Brand Foundation Document (Studio Graphique for IHTC, Fall 2014)
- IHTC Partner Survey (Survey Monkey, Summer 2015)
- IHTC Stakeholder Survey (Survey Monkey, Fall 2015)
- Annual Survey of State Tourism Office Budgets (U.S. Travel Association)
- 2011 Economic Impact of Travel Report (Visit PA)
- 2007-08 Great Allegheny Passage Economic Impact Study (Trail Town Program)
- 2012 Great Allegheny Passage Trail User Survey (Trail Town Program)
- 2015 General Trail User Report (Trail Town Program)