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# Market Assessment and Feasibility Study for a Proposed Hotel in Downtown Greensburg, PA

PRODUCED BY

**Tripp  
Umbach**

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## EXECUTIVE SUMMARY

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### Introduction

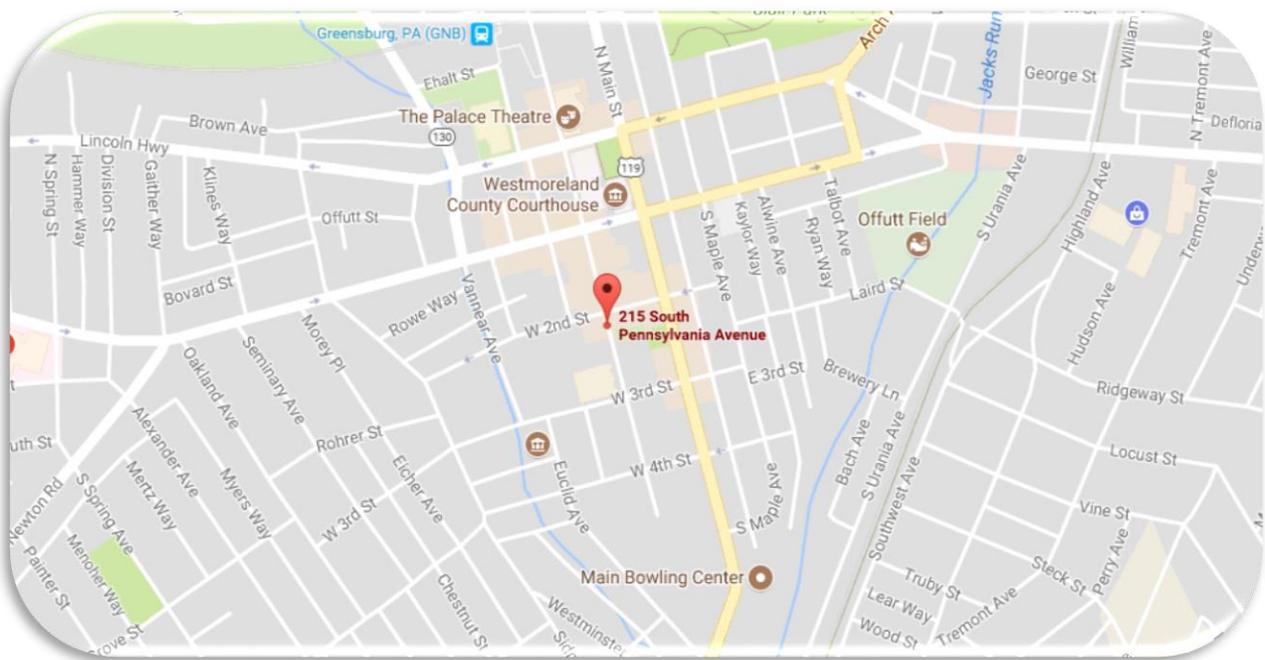
In the Spring of 2017, the city of Greensburg (PA) and the Greensburg Community Development Corporation hired Tripp Umbach to conduct an updated feasibility and market study for a potential hotel in downtown Greensburg.

The purpose of this study was to assess the feasibility for the site of a former department store at 215 South Pennsylvania Avenue, Greensburg, PA. The building contains six floors of 6,500 sq. ft. and ground floor storefront. The site is proposed for the development of a limited-service lodging facility.

After assessing regional hotel market supply and demand, conducting an analysis of the proposed site, completing interviews with local key business leaders, and completing in-depth research on the local economy, Tripp Umbach developed this report to highlight our key findings and recommended next steps. From the key findings, Tripp Umbach outlined specific recommendations that will aid the city of Greensburg and Greensburg Community Development Corporation in making an informed decision to proceed with hotel development in downtown Greensburg.

It should be noted that this study was formed by the 2010 work of HVS Consulting and Valuation<sup>1</sup> which conducted a similar study for the city of Greensburg and the Greensburg Community Development Corporation.

### The Proposed Hotel Location



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<sup>1</sup> HVS is a consulting firm based in Mineola, New York that specializes in providing services to the hospitality industry. As of 2015, HVS operated out of 35 offices located in North America, Europe, Asia, South America, Africa and the Mid-East.

## Study Process

Tripp Umbach set forth to produce a feasibility report sufficient in research, data analysis, and insight to allow the city of Greensburg, the Greensburg Community Development Corporation, and relevant stakeholders to make an informed decision pertaining to hotel development in downtown Greensburg.

Both quantitative and qualitative data informed the feasibility analysis. Tripp Umbach took the following steps to conduct the feasibility study:

### **1. Hotel Market Assessment**

Tripp Umbach collected and analyzed data related to the current market conditions of hotels in the Greensburg area. In conducting this analysis, Tripp Umbach gathered publicly available data as well as purchased STR<sup>2</sup> hotel market demand data reports.

### **2. Stakeholder Interviews**

Tripp Umbach gathered opinions and input from key stakeholders who provided insight into the feasibility of developing a hotel in downtown Greensburg. Information gathered from these interviews included opportunities, challenges, demand, and support for hotel development. Local business leaders, government leaders, and representatives from academic institutions served as key stakeholders for the interviews.

### **3. Site Analysis**

Tripp Umbach assessed and evaluated the proposed site's attributes including (but not limited to): location, access, physical constraints, visibility, parking, auto & pedestrian linkages to and from the surrounding neighborhoods, surrounding amenities, relationship to demand generators, competitive advantages/disadvantages relative to existing lodging venues, and relevant factors.

### **4. Profile of Laurel Highland Visitor Populations**

Tripp Umbach utilized existing primary data from work with the Laurel Highlands Visitors Bureau in order to gain a better understanding of visitors to the region. Data collected from project work with the Laurel Highlands Visitors Bureau in 2016 was employed to better understand the types of travelers who utilize the area's hotels and their travel patterns, including purpose of visit, average length of stay, required facilities and amenities, seasonality, and price sensitivity.

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<sup>2</sup> STR, formerly known as Smith Travel Research, is an American company based in Hendersonville, Tennessee, that tracks supply and demand data for multiple market sectors, including the global hotel industry. STR provides market share analysis for major hotel chains and brands in North America, Europe, Asia Pacific, Middle East and Africa.

## 5. Greensburg Regional Assets and Institutions Profile

In order to understand the current environment of Greensburg and viability to support a hotel downtown, Tripp Umbach collected relevant data from Greensburg's most prominent institutions and assessed their viability for potential partnerships with the future hotel.

### Key Findings and Conclusions

- ✓ **Greensburg's hotel market is growing but has overlooked downtown:** Tripp Umbach utilized the national leader in hotel and lodging research firm, STR, to create a five-year trend review of the Greensburg hotel market. In its assessment, Tripp Umbach has discovered a handful of notable trends<sup>3</sup>:
  - From 2012 until 2016, the occupancy rates of Greensburg and regional hotels have remained fairly stable (between 50-60%).
  - From 2012 until 2016, the average daily rate of Greensburg and regional hotels has increased.
  - From 2012 until 2016, the average supply of rooms of sample Greensburg-area hotels has increased (an increase of 4,300 over five years).
  - From 2012 until 2016, the demand of hotels in the Greensburg area has also increased (a net increase of 9,000).
  - The five-year average of demand of Greensburg and regional hotels has consistently increased between 2012 and 2015, but experienced a drop in 2016.
  - From 2012 until 2016, the revenue of the Greensburg-area sample hotels has grown at a very steady rate (an increase of \$2 million).

In addition, downtown Greensburg is an emerging cultural and tourist location. There are lodging offerings in the Greensburg region, but none in the downtown core. Investments in attractions such as the renovated Palace Theatre, Westmoreland Museum of American Art, and the Seton Hill University Performing Arts Center (opened in 2009) and Arts Center (opened in 2015) have breathed new life into a once sagging downtown corridor. With the nearest hotel about 2 miles away from the city core, Greensburg has a need for a true downtown hotel. Tripp Umbach recommends a small-scale hotel (60-80 rooms with limited dining options) which should protect itself from market fluctuations of demand.

- ✓ **Partnerships with community and regional institutions is key to the hotel's success:** When speaking with various stakeholders and assessing the need for a hotel in downtown Greensburg, it became evident that partnerships with city and regional institutions will be important for making the proposed hotel a success. Specifically, the proposed hotel must work to form partnerships with key regional players such as The Palace Theatre, Westmoreland Museum of American Art, Seton Hill University, Pitt Greensburg, the Laurel Highlands Visitors Bureau, and Excelsa Health. These organizations, while not a fully exhaustive list, offer many opportunities for the hotel and will help

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<sup>3</sup> For an expanded look at STR data pertaining to the Greensburg and regional hotel market, please see Appendix A

drive demand. Specifically, Tripp Umbach has identified key opportunities for each of these institutions:

- *The Palace Theatre*: Approximately 50% of the 15,000 tickets sold for The Palace Theatre tickets were to patrons outside of Westmoreland County and approximately 10% were to patrons who reside outside of Southwest Pennsylvania and the state of Pennsylvania<sup>4</sup>. With a growing reputation and a rejuvenated concert and performance lineup, the theatre will likely continue to attract additional patrons from outside the region and drive the need for a downtown hotel.
- *Seton Hill University and Pitt Greensburg*: Tripp Umbach estimates<sup>5</sup> that each of these schools – through various needs such as conferences, professor visitations, and other professional matters – will drive demand for a downtown hotel by an additional 25-75 rooms a year, with an additional 50 or so coming from athletics as well.
- *Laurel Highlands*: According to survey work done by Tripp Umbach for the Laurel Highlands Visitors Bureau (LHVB) in 2016, more than one-third (39%) of survey takers stayed overnight. Additionally, our research<sup>6</sup> found that visitors are willing to spend more (\$140-\$200) than the daily rate reported by STR<sup>7</sup> (\$100 a night). The proposed downtown hotel would be wise to work and partner with the LHVB to create package trips that bring tourists into the region but ultimately lead them to staying overnight in downtown Greensburg. Greensburg needs to become better marketed as a “destination” within the Laurel Highlands according to interviewed stakeholders.
- *Westmoreland Museum of American Art*: Like the Palace Theatre and the Laurel Highlands, the Westmoreland Museum of American Art is a major tourism and cultural asset that should lead to an increase in demand for a downtown hotel. Approximately 40,000 visitors are attracted to the museum every year. Of those 40,000, roughly 40% are from outside of Westmoreland County<sup>8</sup>. Again, this represents an opportunity for the downtown hotel with such a close location to the museum.
- *Excelsa Health*: Tripp Umbach, based on industry experience and internal data, projects that a similarly sized health organization would spend approximately \$150,000-\$200,000 a year on hotel costs for roughly 1,200-1,500 nights (which aligns favorably with the industry and regional averages of \$110-\$140 a night for a typical room<sup>9</sup>). These rooms would be driven by demand for such things like meetings, conferences, sleep studies, physician recruitment, and on-call physicians.

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<sup>4</sup> The Palace Theatre

<sup>5</sup> Using Tripp Umbach industry experience and internal data

<sup>6</sup> See Appendix B

<sup>7</sup> See Appendix A

<sup>8</sup> Westmoreland Museum of American Art

<sup>9</sup> See Appendix A

- ✓ **Residents and tourists are returning to the city – a national trend recognized by Tripp Umbach:** It is no secret that the current societal tastes have drawn companies, tourists, and companies out of the suburbs and back to cities in recent years. According to the 2013 Census Bureau data, the year 2013 saw 2.3 million more people living in metro areas than in 2012, with 269.9 million people now living in cities and their surrounding areas. The shift in population to America’s metro areas has been increasing since 2010, when the American economy began to recover<sup>10</sup>. Companies have also joined the trend – many, both large and small, are looking to move back to urban cores<sup>11,12</sup>. More business traffic means increased demand for downtown rooms.

Further, it is important to consider the age of Greensburg citizens. According to Data USA<sup>13</sup>, the median age of people in Greensburg, PA in 2015 was 40.6 – native-born citizens (40.3) are generally younger than foreign-born citizens (51.6). Compared to 2014, where the average age was 41.2, the residents of Greensburg, PA are getting younger<sup>14</sup>. This is important to note because the return to downtown by Millennials and young citizens is based on a new fondness for service amenities: music venues, theaters, bars, gyms (services that are growing in downtown Greensburg). Consumers have a fresh taste for living near these amenities, which could make urban revival more durable. From 2000 to 2010, more college-educated professionals aged 25 to 34 moved downtown than to the suburbs in 39 of the 50 largest U.S. metros<sup>15</sup>.

- ✓ **The city of Greensburg has support for a new hotel by local leaders and residents:** During the Spring of 2017, Tripp Umbach interviewed 15 key stakeholders and leaders within the Greensburg community. These interviews served as an opportunity to hear from local residents, professionals, and business owners to voice their support and concerns regarding the proposed hotel.

In summary, many felt that downtown Greensburg was ripe for a new hotel due to the expanding arts, cultural, and tourism industries in the city and the region. Many respondents believed that the economy and demographics of the city were trending in the right direction which should lead to the hotel becoming a success. Concerns for the proposed hotel included the aforementioned need of partnering with local organizations and institutions to maintain necessary demand levels as well as proper marketing and collaborations with various tourism organizations such as the Laurel Highlands Visitors Bureau (i.e. package deals). Some interviewees felt that the hotel boom in Pittsburgh would negatively affect demand in Greensburg, but industry analysts<sup>16</sup> and Tripp Umbach believe the markets are too distant to compare the demand and supply dynamics of each region.

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<sup>10</sup> The Atlantic, *More Americans Moving to Cities, Reversing the Suburban Exodus*, March 27, 2014

<sup>11</sup> The Economist, *Leaving for the City*, September 1, 2016

<sup>12</sup> New York Times, *Why Corporate America Is Leaving the Suburbs for the City*, August 1, 2016

<sup>13</sup> In 2014, Deloitte, Datawheel, and Cesar Hidalgo, Professor at the MIT Media Lab and Director of MacroConnections, worked to form Data USA with the goal of understanding and visualizing the critical issues facing the United States in areas like jobs, skills and education across industry and geography.

<sup>14</sup> Data USA

<sup>15</sup> City Lab, *The Real Source of America's Urban Revival*, February 23, 2016

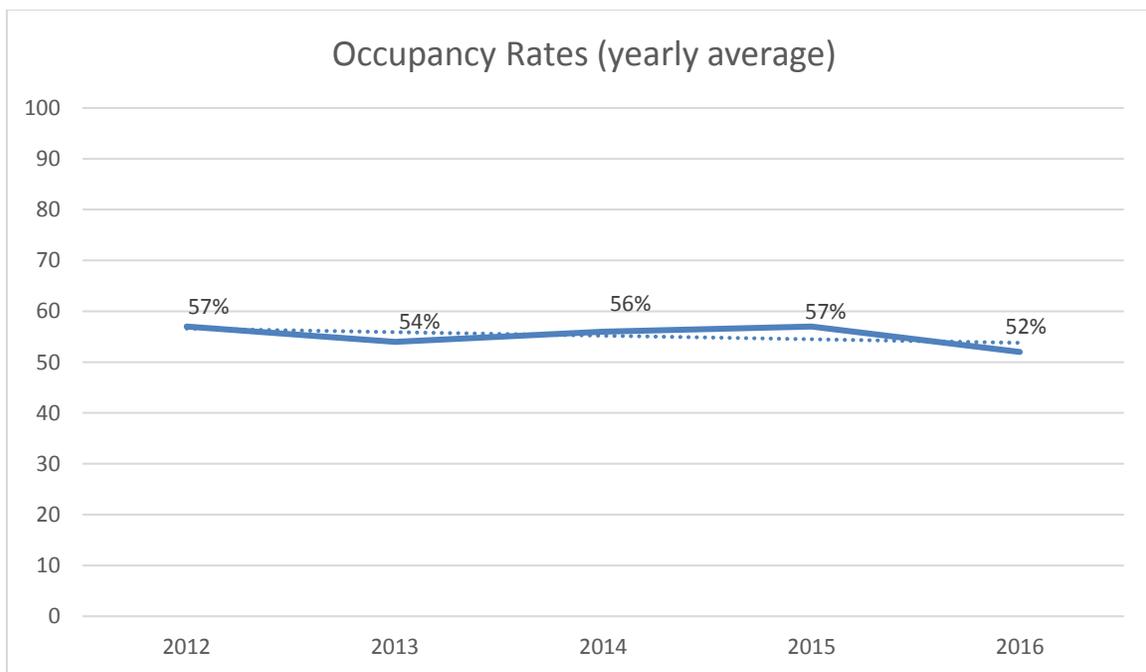
<sup>16</sup> Hotel Management, *Pittsburgh's Supply Boom Not a Long-term Concern for Hotels*, May 23, 2017

## APPENDIX A: LODGING TRENDS OF THE GREENSBURG HOTEL MARKET

In order to assess the feasibility of the proposed downtown Greensburg hotel, Tripp Umbach gathered data by STR travel research firm to analyze hotel/lodging trends within the greater Greensburg area. The following hotels<sup>17</sup> were used to create the averages used by STR in the five-year averages.

Hotel	Class	Open Date	Rooms
Econo Lodge Greensburg (closed)	Economy Class	Jun 1960	0
<b>Quality Inn Greensburg</b>	<b>Midscale Class</b>	<b>Jan 1995</b>	<b>57</b>
<b>Hampton Inn Greensburg</b>	<b>Upper Midscale Class</b>	<b>Sep 1999</b>	<b>69</b>
<b>Holiday Inn Express &amp; Suites Greensburg</b>	<b>Upper Midscale Class</b>	<b>Jul 2014</b>	<b>72</b>
<b>Courtyard Pittsburgh Greensburg</b>	<b>Upscale Class</b>	<b>Jun 2007</b>	<b>102</b>
<b>Super 8 Greensburg</b>	<b>Economy Class</b>	<b>Feb 1992</b>	<b>64</b>
<b>Ramada Greensburg Hotel &amp; Conference Center</b>	<b>Midscale Class</b>	<b>Jun 1978</b>	<b>146</b>
<b>Mallview Motel</b>	<b>Economy Class</b>	<b>Mar 1972</b>	<b>50</b>
<b>Knights Inn Greensburg</b>	<b>Economy Class</b>	<b>Jun 1983</b>	<b>100</b>
Comfort Inn Greensburg (closed)	Upper Midscale Class	May 1992	0
<b>The Inn @ Mountain View</b>	<b>Midscale Class</b>	<b>Jun 1924</b>	<b>50</b>
<b>Wingate By Wyndham Latrobe</b>	<b>Midscale Class</b>	<b>Jun 2000</b>	<b>80</b>
<b>Springhill Suites Pittsburgh Latrobe</b>	<b>Upscale Class</b>	<b>Jun 2012</b>	<b>109</b>

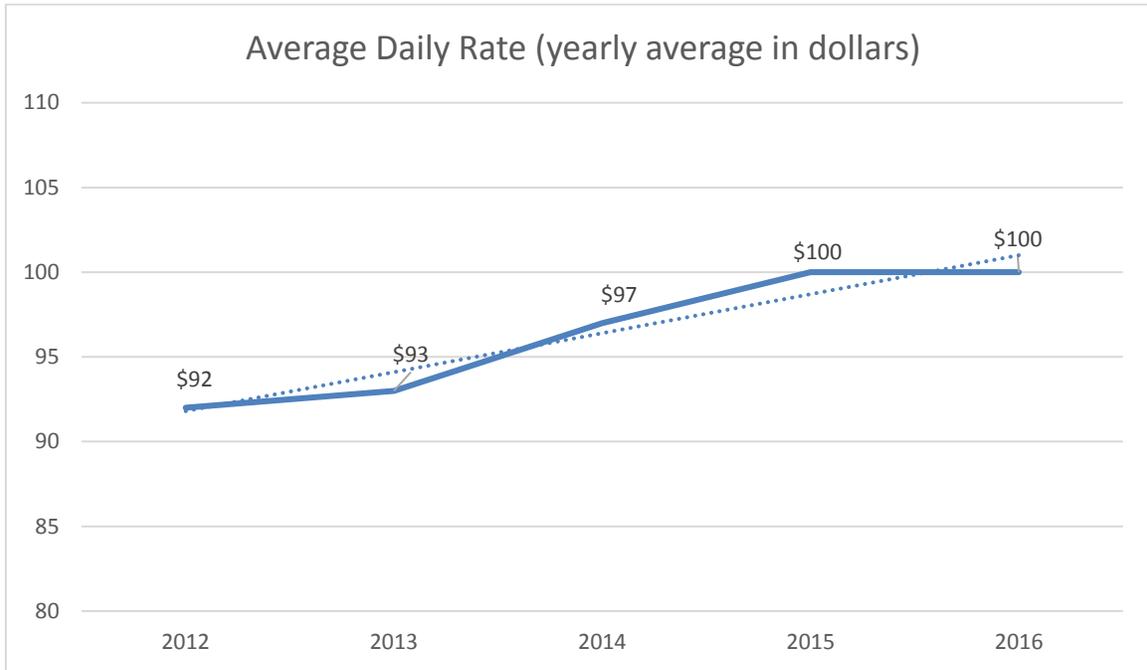
Figure 1. Occupancy Rates



<sup>17</sup> Hotels that are currently closed were used to formulate the five-year averages for trending purposes

- From 2012 until 2016, the occupancy rates have remained fairly stable, ranging from 57% to 52%.
- The five-year average consistently hovered between 50% and 60%, which aligns with industry averages<sup>18</sup>.

**Figure 2. Average Daily Rates**

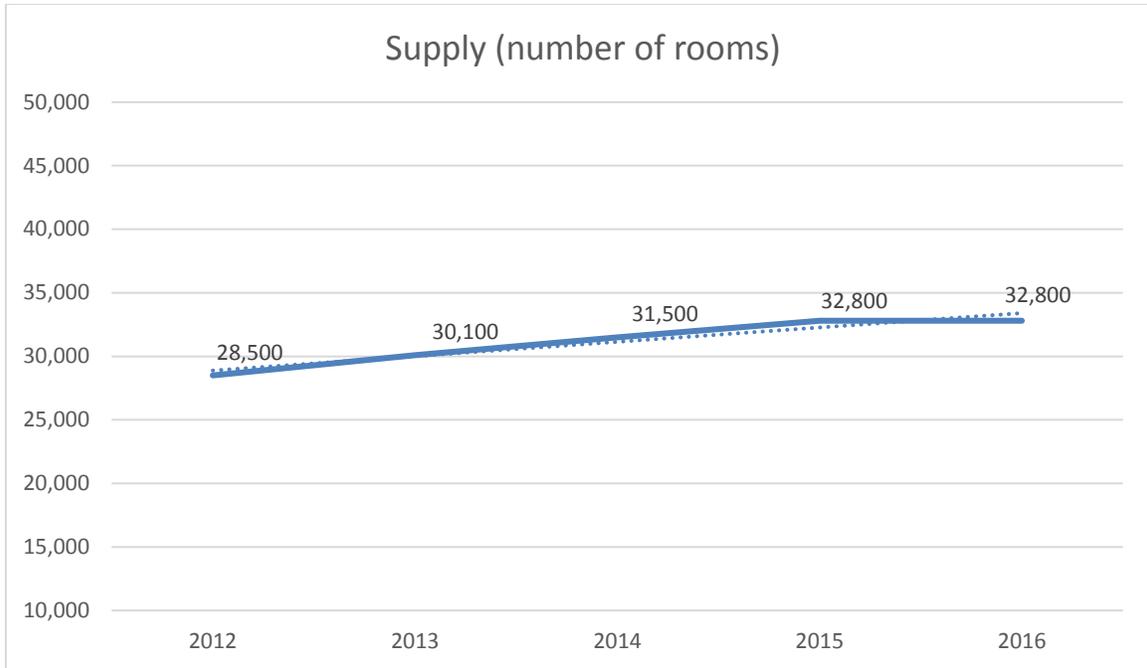


- From 2012 until 2016, the average daily rate of the sample Greensburg-area hotels has increased.
- The five-year average consistently hovered between \$90 and \$100, which is slightly less than the \$119 average for the Pittsburgh region<sup>19</sup>. This average has been lowered due to the inclusion of lower-end hotels in the region that were included in the analysis such as the Knights Inn and Mallview Motel.

<sup>18</sup> Hotel occupancy rate of the U.S. 2001-2016, Statista.

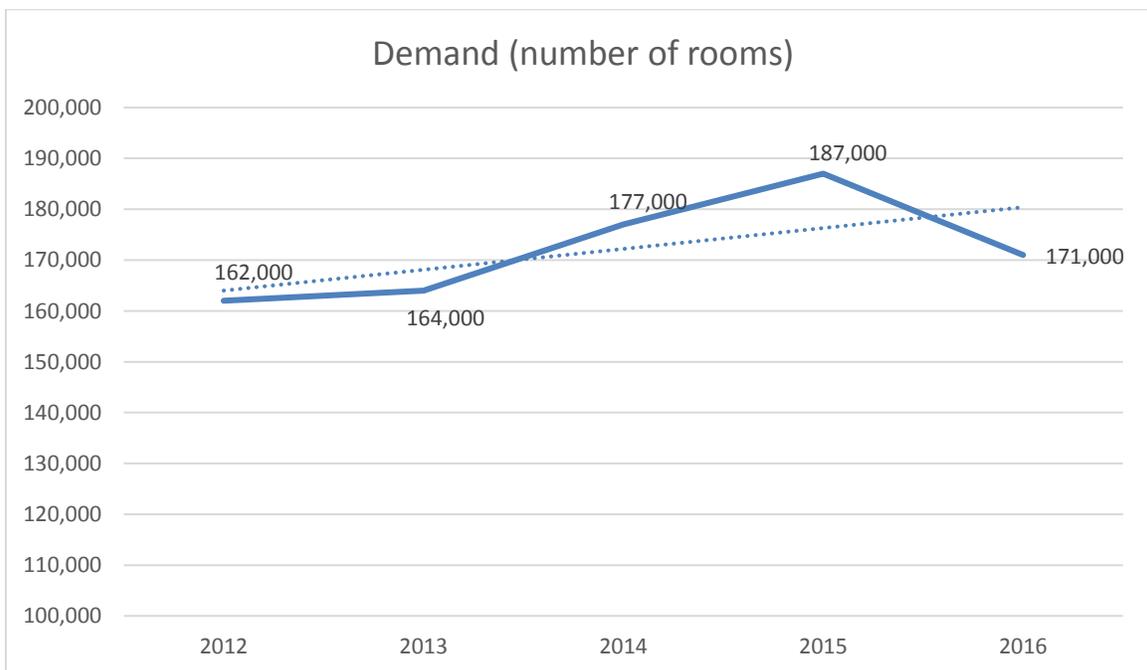
<sup>19</sup> STR

**Figure 3. Room Supply**



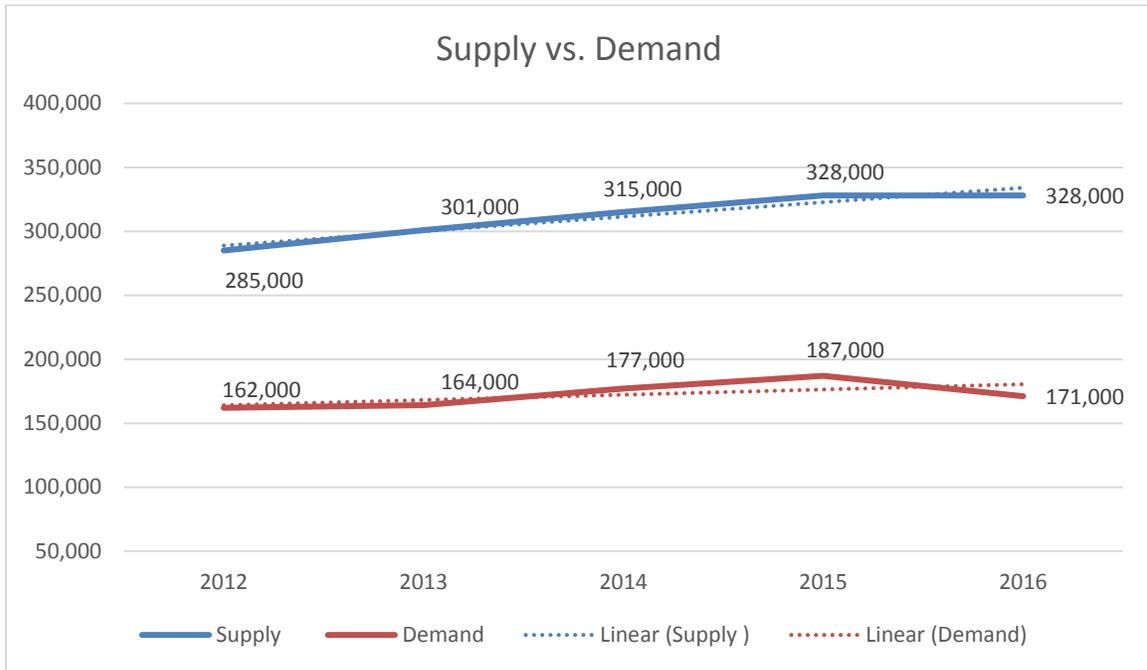
- From 2012 until 2016, the average supply of rooms of sample Greensburg-area hotels has increased slightly.
- The five-year trend shows an increase of about 4,300 new rooms within the Greensburg-area sample. This can be attributed to new openings in the area, such as Springhill Suites and Holiday Inn Express.

**Figure 4. Room Demand**



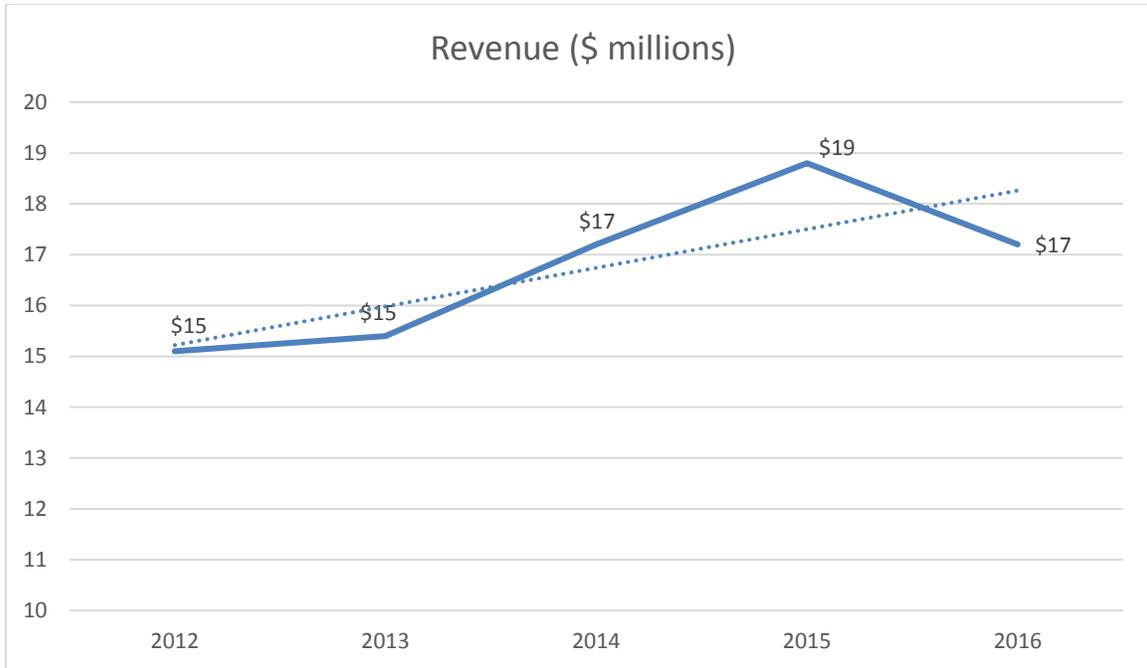
- From 2012 until 2016, the demand of hotels in the Greensburg area has increased significantly.
- The five-year average of demand has consistently increased between 2012 and 2015, with a drop in 2016. From 2012 until 2016, there has been a net increase in demand by approximately 9,000 rooms.

**Figure 5. Room Supply vs. Demand**



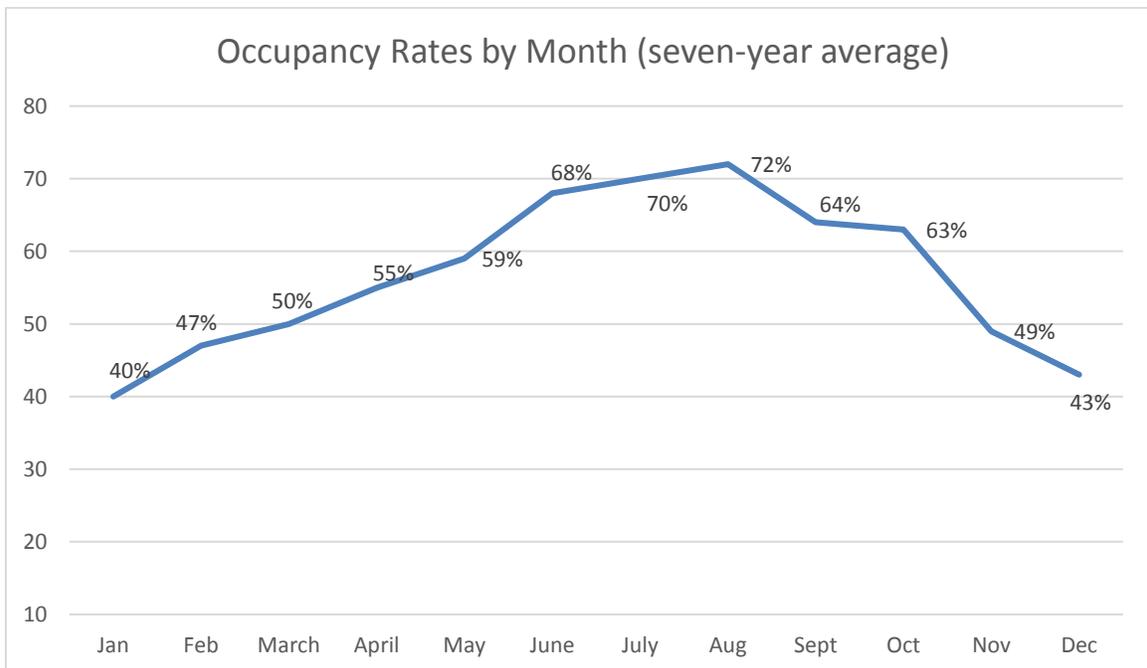
- From 2012 until 2016, supply and demand have grown at a fairly consistent rate (15% Supply increase vs. 6% Demand increase).
- The Supply has grown from 285,000 to 328,000 rooms over a five-year period.
- The Demand has grown from 162,000 to 171,000 over a five-year period.

**Figure 6. Room Revenue**



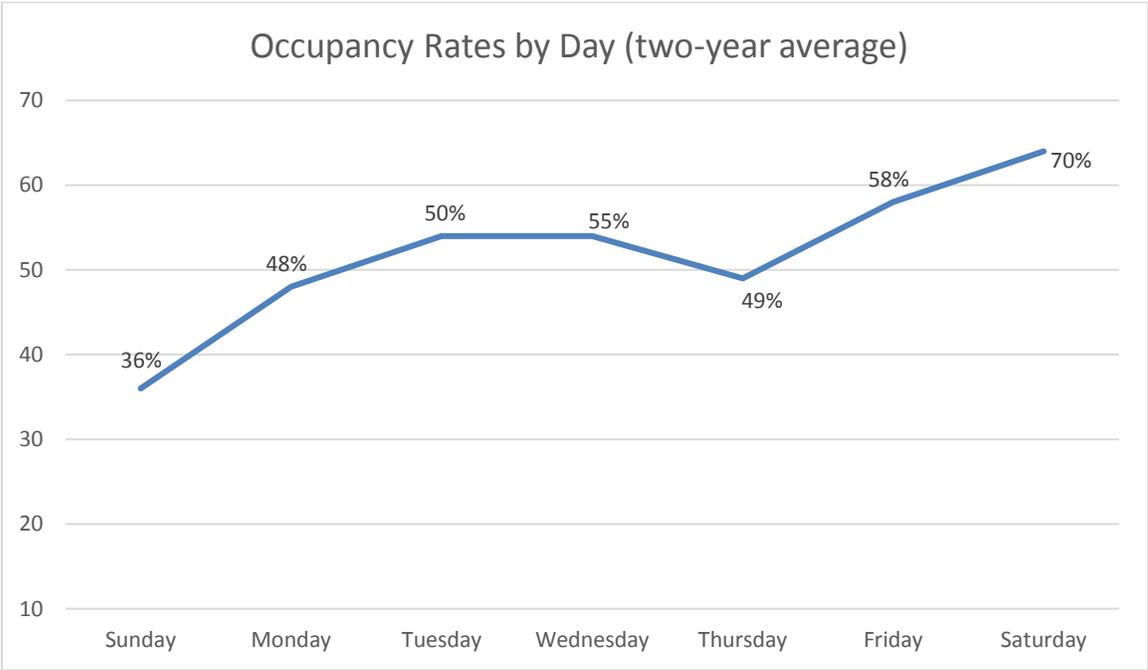
- From 2012 until 2016, the revenue of the Greensburg-area sample has grown at a very steady rate (a growth rate of about 13%).
- The five-year average of room revenue, however, increased from \$15 million to \$17 million, with a notable peak in 2015 of \$19 million (a net increase of \$2 million).

**Figure 7. Occupancy Rates by Month**



- Over a seven-year sample period, the average monthly occupancy rate was steadily above 50% between March and October.
- Only four out of twelve months saw the average monthly rate drop below 50%.
- The strongest season for occupancy occurs during May through October, peaking in August.

**Figure 8. Occupancy Rates by Day**



- Over a two-year sample period, the average daily occupancy rate was around 50% or above Tuesday through Saturday.
- Predictably, the strongest nights for occupancy rates occur Friday and Saturday nights, with a surprising bump on Wednesday nights as well.

## APPENDIX B: LAUREL HIGHLANDS VISITOR DATA

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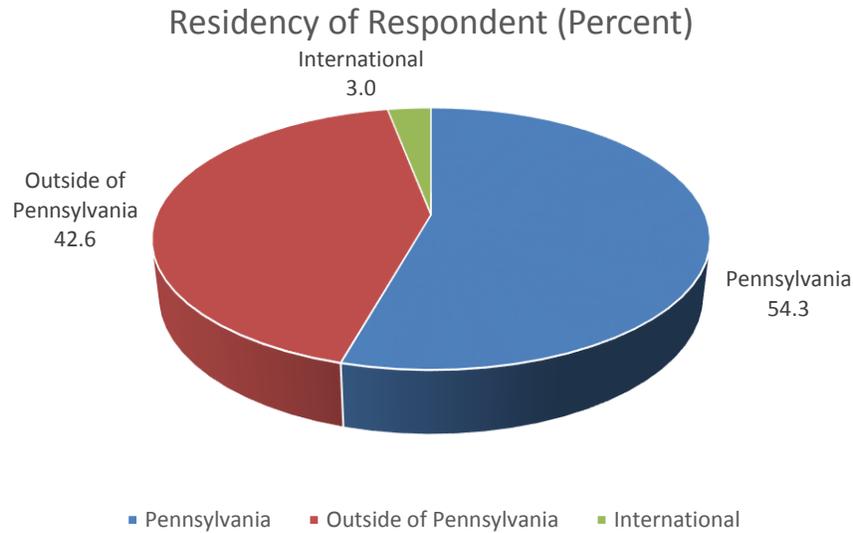
Beginning in the fall of 2016 through early winter 2017, Tripp Umbach used a hand-distributed survey methodology to collect input from tourist populations visiting the Laurel Highlands regions. Specific sites or local events were identified to collect data for the study. They included: Seven Springs Mountain Resort, Frank Lloyd Wright's Fallingwater, Fort Ligonier Days, Ohiopyle State Park, and Flight 93 Memorial.

Tripp Umbach worked closely with organization leaders from each identified site and local event leaders to employ a team from Team Umbach to distribute and collect surveys. Through the duration of the collection phase over eight hundred intercept-surveys were collected from tourists in Pennsylvania, throughout the United States, and internationally.

The following data represents additional evidence to show a possible future increase in hotel demand in Greensburg and the surrounding area. Partnering with the Laurel Highlands Visitors Bureau, as well as specific sites, provide another opportunity for strategic partnerships:

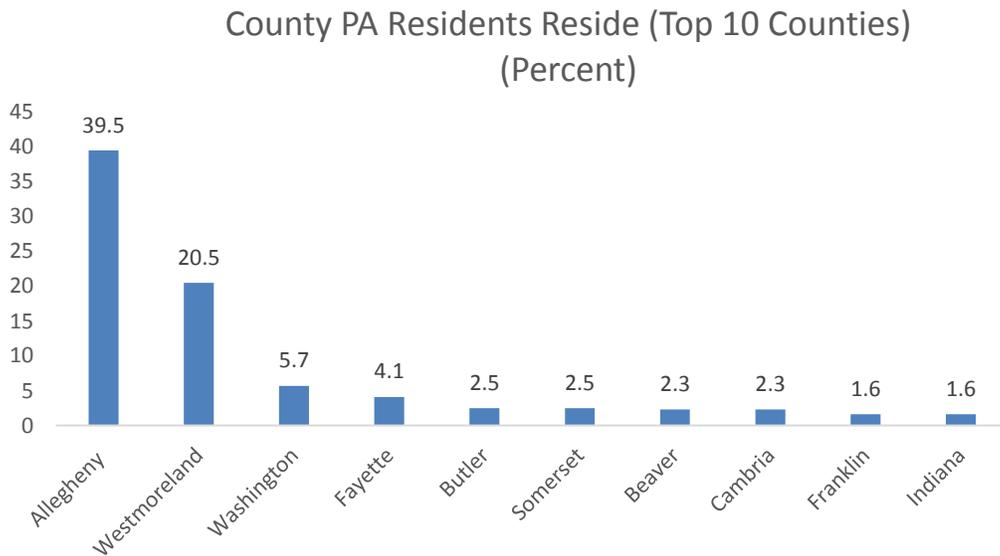
- Total number of surveys collected is 897.
- There was good representation between visitors from Pennsylvania (54.3%) versus out-of-Pennsylvania and International combined (45.6%).
- An overwhelming majority of visitors came to the region for pleasure (95.4%). Visiting family and friends was one of the main reasons visitors came to the Laurel Highlands region (21.8%).
- **More than one-third (40%) of survey takers stayed overnight.**
- **Visitors are willing to spend more to stay overnight in the area (\$140-\$190) than the average daily hotel rate that we see in the STR data (\$100).**
- **A majority (80%) of respondents were from outside Westmoreland County.**
- **About 44% of tourists come from a state other than Pennsylvania.**

**Figure 9: Residency of Respondents**



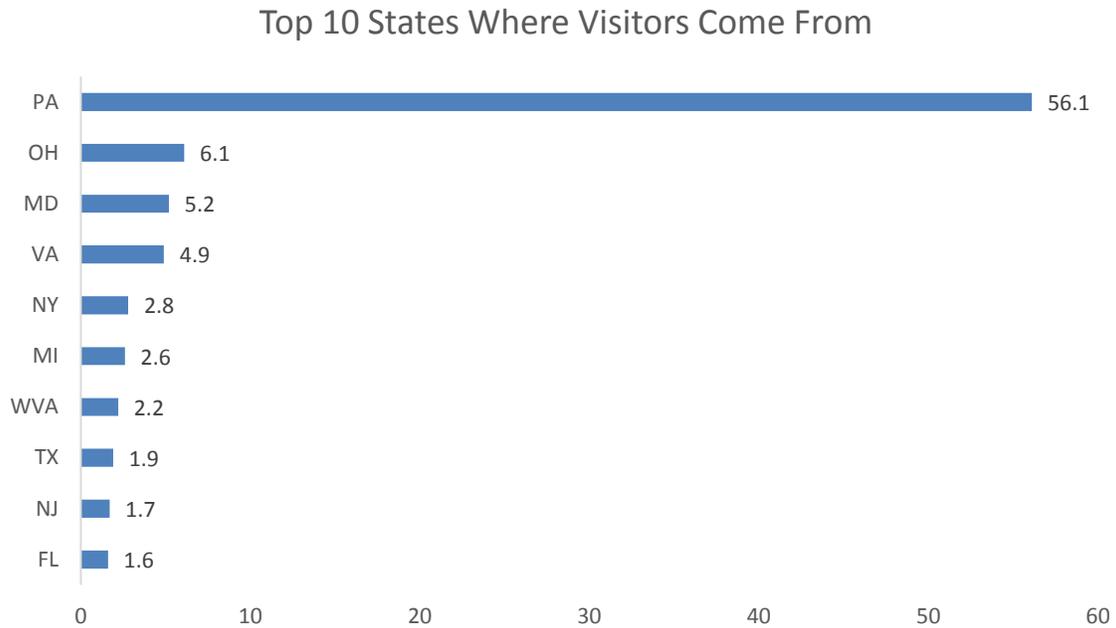
- Tripp Umbach was able to capture a fairly even amount of survey respondents who resided in Pennsylvania (54.3%) and outside Pennsylvania (42.6%).

**Figure 10: County of PA Residents**



- More than one-third of PA residents who responded to the survey (in descending order) reside in Allegheny County, Westmoreland, Washington, Fayette, Butler, Somerset, Beaver, Cambria, Franklin, and Indiana. Only the top ten counties are represented in the chart below.

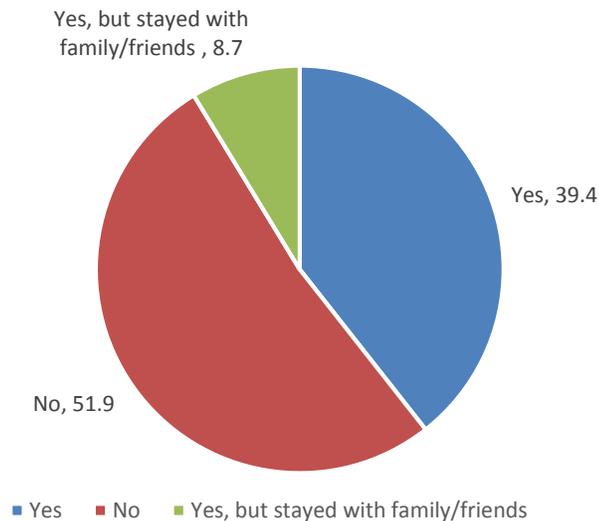
**Figure 11: Top 10 States Where Visitors Come From**



- The most common state where visitors come from is PA, OH, MD, VA, and NY. Only the top 10 states are presented.

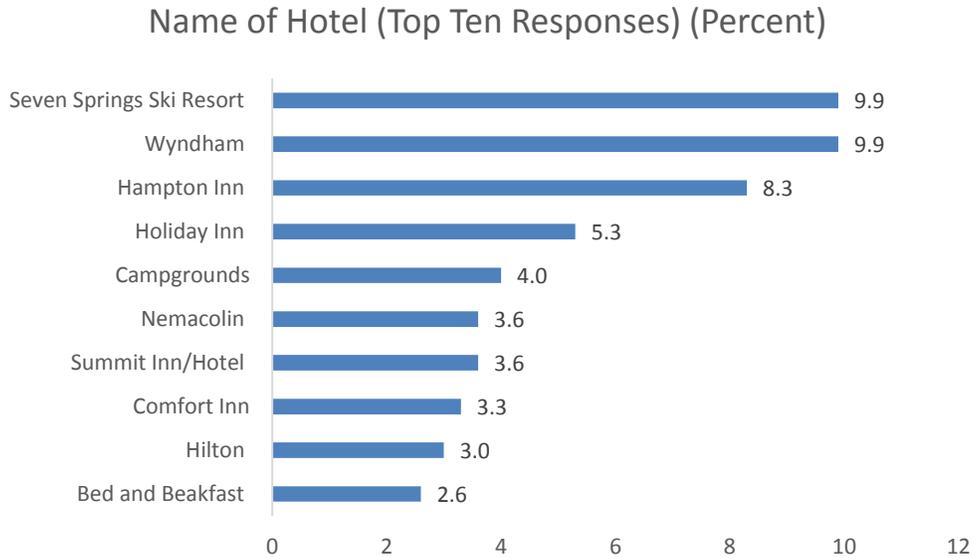
**Figure 12: Type of Trip**

Did You Stay Overnight? (Percent)



- Nearly 40% of respondents stayed overnight somewhere other than a friends or family's house.

**Figure 13: Name of Hotel**



- 10.1% of visitors stayed at Seven Springs Ski Resort, followed by the Wyndham (9.8%), and the Hampton Inn (7.9%). Only the top ten responses are represented in the chart below.

**Figure 14: Spending averages by visitors who reside in the Laurel Highlands (Fayette, Somerset, and Westmoreland Counties)**

TYPE OF SPENDING	Average
<b>Lodging (e.g. hotel, motel, cabin, camp ground, vacation home rental, etc.)</b>	<b>\$140.23</b>
Gas	\$31.33
Entertainment (e.g. site ticket cost, movies, water parks, museums, theatres, casino, etc.)	\$71.72
Transportation (e.g. tolls, bus, trolley, parking, bike rentals, etc.)	\$13.47
Retail shopping (e.g. merchandise, souvenirs, novelty items, etc.)	\$96.57
Grocery and convenience stores (e.g. food, drink, etc.)	\$51.88
Food/drink at restaurants/bars	\$52.84
Other*	\$200.00

\*small sample size

**Figure 15: Spending averages by visitors who reside in counties within Pennsylvania**

<b>TYPE OF SPENDING</b>	<b>Average</b>
<b>Lodging (e.g. hotel, motel, cabin, camp ground, vacation home rental, etc.)</b>	<b>\$169.00</b>
Gas	\$24.63
Entertainment (e.g. site ticket cost, movies, water parks, museums, theatres, casino, etc.)	\$77.56
Transportation (e.g. tolls, bus, trolley, parking, bike rentals, etc.)	\$23.91
Retail shopping (e.g. merchandise, souvenirs, novelty items, etc.)	\$57.46
Grocery and convenience stores (e.g. food, drink, etc.)	\$38.50
Food/drink at restaurants/bars	\$54.32
Other*	\$46.25

\*small sample size

**Figure 16: Spending averages by visitors who reside outside of Pennsylvania**

<b>TYPE OF SPENDING</b>	<b>Average</b>
<b>Lodging (e.g. hotel, motel, cabin, camp ground, vacation home rental, etc.)</b>	<b>\$196.53</b>
Gas	\$33.18
Entertainment (e.g. site ticket cost, movies, water parks, museums, theatres, casino, etc.)	\$88.95
Transportation (e.g. tolls, bus, trolley, parking, bike rentals, etc.)	\$57.11
Retail shopping (e.g. merchandise, souvenirs, novelty items, etc.)	\$71.10
Grocery and convenience stores (e.g. food, drink, etc.)	\$36.41
Food/drink at restaurants/bars	\$80.55
Other*	\$126.86

\*small sample size

**Figure 17: Spending averages by overnight visitors**

TYPE OF SPENDING	Average
<b>Lodging (e.g. hotel, motel, cabin, camp ground, vacation home rental, etc.)</b>	<b>\$195.66</b>
Gas	\$33.25
Entertainment (e.g. site ticket cost, movies, water parks, museums, theatres, casino, etc.)	\$76.20
Transportation (e.g. tolls, bus, trolley, parking, bike rentals, etc.)	\$38.89
Retail shopping (e.g. merchandise, souvenirs, novelty items, etc.)	\$72.18
Grocery and convenience stores (e.g. food, drink, etc.)	\$36.41
Food/drink at restaurants/bars	\$86.73
Other*	\$145.00

\*small sample size

## APPENDIX C: OVERVIEW OF GREENSBURG AND REGIONAL INSTITUTIONS

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In order for the proposed hotel in downtown Greensburg to be a success, Tripp Umbach believes that partnerships with local institutions will be vital. Below is an overview of the institutions Tripp Umbach has identified as strong potential partners.

**The Palace Theatre:** The Palace Theatre has been a major force in Westmoreland County’s cultural scene for generations. Opened September 2, 1926, as the Manos Theatre, The Palace Theatre today hosts the widest variety of live entertainment in the area in a beautifully renovated 1,369-seat facility, located across from the county courthouse at 21 West Otterman Street in downtown Greensburg, PA.

The historic West Otterman Street venue draws thousands of people to Greensburg each year. And the money they spend on tickets, meals, hotel rooms and more adds up — to the tune of \$9 million injected into the local economy annually, according to the Westmoreland Cultural Trust’s most recent economic impact study.

A 2014 study showed the theater’s economic impact had increased by nearly \$2 million since 2009, and the Palace Theatre hopes to see a similar increase when the study is repeated in 2019.

The Palace’s growth corresponds to an overall expansion of the tourism industry in Westmoreland County. Travelers here spent \$772.4 million in 2014, according to a study commissioned by the Pennsylvania Department of Community and Economic Development (an increase of \$30 million from the prior year).

In Greensburg, a focus on the arts has helped the city grow its tourism base. In 2001, the Palace hosted 73 shows — 23 of which featured national touring artists. In 2015, it held 115 shows, and 74 of those were nationally known<sup>20</sup>.

**Seton Hill University:** Founded by the Sisters of Charity in 1885 and chartered in 1918, Seton Hill University is a leading Catholic coeducational liberal arts university embracing students of all faiths. Located in southwestern Pennsylvania’s Laurel Highlands, Seton Hill educates its 2,200 students to “think and act critically, creatively and ethically as productive members of society committed to transforming the world.” Seton Hill is accredited nationally by the Middle States Commission on Higher Education<sup>21</sup>.

**Pitt Greensburg:** A four-year, baccalaureate degree-granting, state-related university institution that is a regional residential campus of the University of Pittsburgh located in Hempfield Township, Westmoreland County, Pennsylvania, United States. Opened in 1963, Pitt-Greensburg was granted four-year degree-granting status in 1988.

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<sup>20</sup> Pittsburgh Tribune Review, *Cultural Tourism on The Rise In Westmoreland County*, Laurel Highlands, April 1, 2017.

<sup>21</sup> Seton Hill University

Currently, there are 1,437 Full-Time students and 84 Part-Time (does not include college high school programs). More than 600 students reside on campus and nearly 1,000 students commute to campus<sup>22</sup>.

**Laurel Highlands:** Spanning over 2,900 square miles of Pennsylvania's highest mountain tops rolling countryside and sparkling waterways, the Laurel Highlands is located in the southwestern corner of the state about a one-hour drive east of Pittsburgh. The region is home to some of Pennsylvania's most iconic sites, thousands of acres of pristine federal and state parkland and some of the prettiest scenery in America. From Frank Lloyd Wright's Fallingwater to the Flight 93 National Memorial to the Great Allegheny Passage Rail-Trail and Idlewild & SoakZone - voted the Best Amusement Park for Kids in the World! The Laurel Highlands is one of the Mid-Atlantic's most scenic and diverse destinations<sup>23</sup>.

Travelers spent over \$1.8 billion in the region in 2015 – down slightly (-0.9%) from 2014. The decrease was largely tied to a drop-in spending on lodging and transportation that offset an increase in purchases of food and beverages and on recreation.

The region continued to have the second highest proportion of traveler dollars going to lodging (as compared to all Pennsylvania tourism regions) despite the decrease in spending, and the third highest share of trip dollars on food & beverage purchases and shopping among the state's tourism regions<sup>24</sup>.

**Westmoreland Museum of American Art:** The Westmoreland Museum of American Art was established in 1959 through a bequest from Mary Marchand Woods, a long-time Greensburg resident who wanted her community to have an important cultural institution. From the early years, an inspirational collection of significant American art was amassed, alongside a strong exhibition and educational program.

The mission of The Westmoreland Museum of American Art is to enrich a growing public through innovative and collaborative approaches to the collection, preservation and presentation of American art<sup>25</sup>. The museum attracts approximately 37,000-40,000 visitors every year, of which about 40% come from outside Westmoreland County.

**Excelsa Health:** Founded in 2004, Excelsa Health brought together three hospitals – Frick Hospital in Mount Pleasant, Latrobe Hospital in Latrobe, and Westmoreland Hospital in Greensburg – along with other health care affiliates to meet the health care needs of those in Westmoreland, northern Fayette and southern Indiana counties. To serve the needs of communities better, they actively recruit new physicians and currently have a medical staff of more than 735 physicians and allied health professionals in 35 clinical specialties along with more than 4,900 employees and 797 volunteers. They have also invested in new technologies, bringing the latest advances to Westmoreland County<sup>26</sup>.

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<sup>22</sup> Pitt Greensburg

<sup>23</sup> Laurel Highlands Visitors Bureau

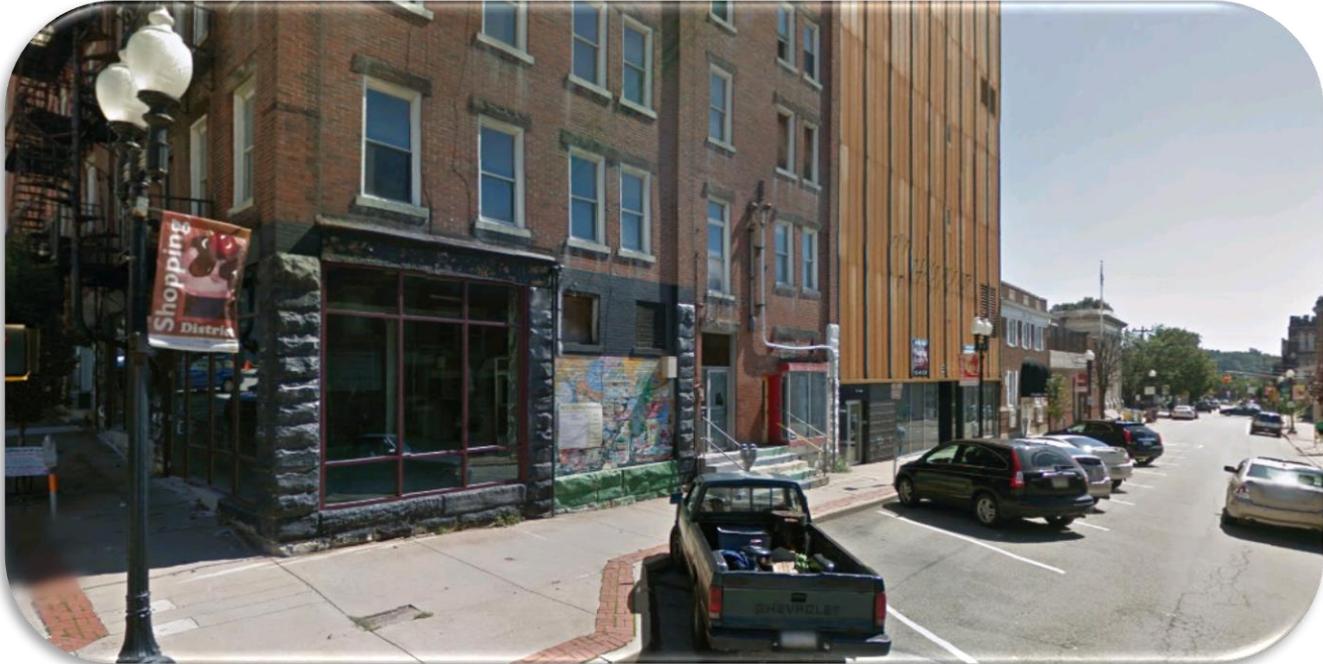
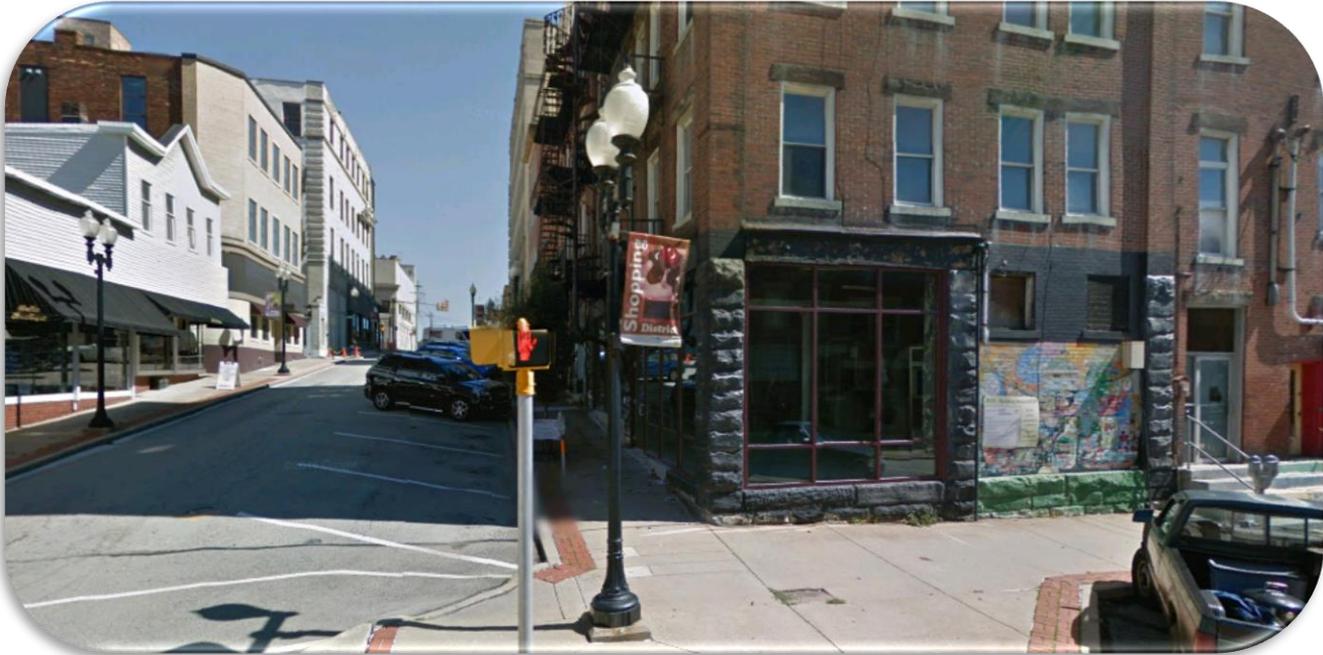
<sup>24</sup> The Economic Impact of Travel in Pennsylvania 2015 Report

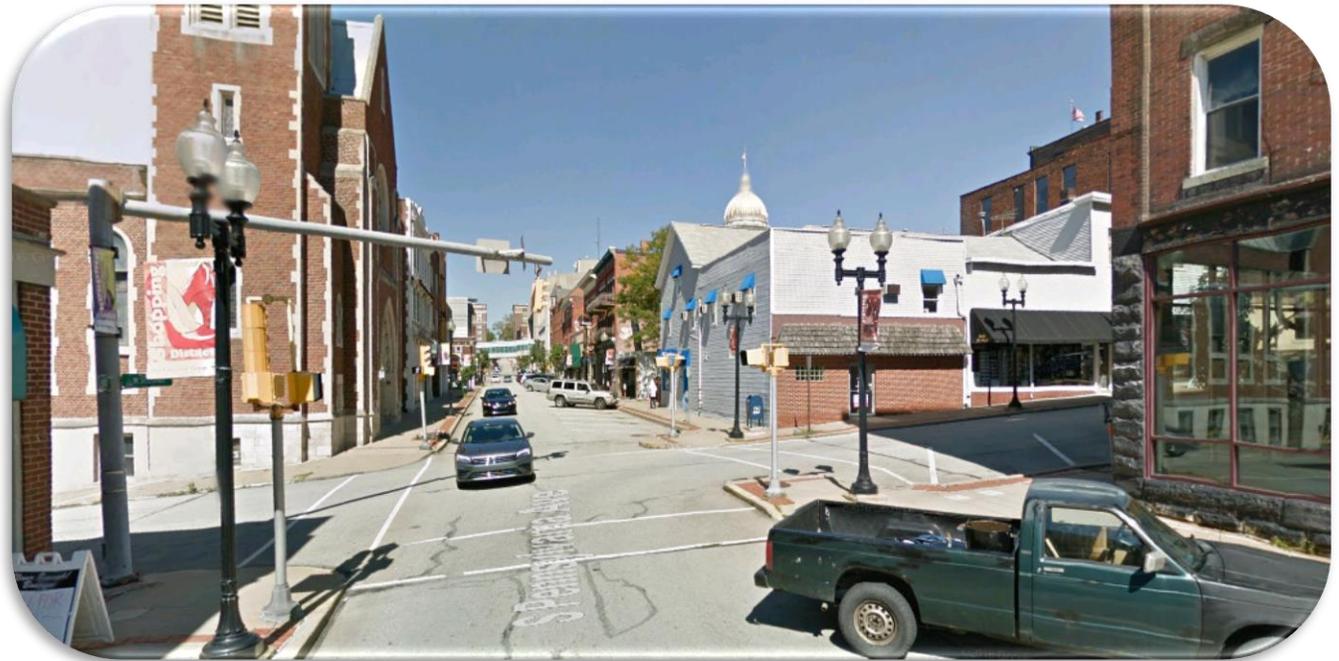
<sup>25</sup> Westmoreland Museum of American Art

<sup>26</sup> Excelsa Health

**APPENDIX D: SITE ANALYSIS**

Tripp Umbach visited the site of the proposed hotel during April 2017 to assess the opportunities and challenges of the proposed site of the hotel (215 South Pennsylvania Avenue, Greensburg, PA). The visit served as an opportunity for Tripp Umbach consultants to experience the site firsthand and to identify notable characteristics of the property.





**Location:** 215 South Pennsylvania Avenue, Greensburg, PA.

**Access:** The site is accessible by West 2<sup>nd</sup> Street and South Pennsylvania Ave in downtown Greensburg.

**Physical Constraints:** The site is accessible by only two intersecting two-lane roads. West 2<sup>nd</sup> Street is on a steep grade. The site is joined by other buildings to one side. There is not much room for expansion beyond the site as it stands.

**Visibility:** Due to its corner location, the site is fairly visible from both of its connecting roads.

**Parking:** Space for close-proximity parking will be available thanks to a lot on the other side of South Pennsylvania Ave. On street parking is available following South Pennsylvania Ave that runs parallel to the front of the building. Parking lots may be available on adjacent parcels on the far side of Pennsylvania Ave. The surrounding area also has additional on-street parking.

\*The site is surrounded by various amenities, restaurants, tourist sites, and shops which should help drive demand.

- The Palace Theatre
- Seton Hill University
- Pitt Greensburg
- Westmoreland Museum of American Art
- Westmoreland County Courthouse
- Amtrak Station
- Excelsa Health