

**TO:** Northeastern Vermont Development Association  
**FROM:** Drew Pollak-Bruce, SE Group  
**DATE:** 12/13/2022  
**RE:** Lamoille Valley Rail Trail User Projections and Economic Impact Analysis in Caledonia County

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This report summarizes projected trail visitation and resulting economic impact along the Lamoille Valley Rail Trail between St. Johnsbury and Hardwick. The segments analyzed in this report include:

- 1) St. Johnsbury to Joe's Pond (16.3 miles)
- 2) Joe's Pond to Greensboro Bend (11.1 miles)
- 3) Greensboro Bend to Hardwick (10.5 miles)

The information in this report is intended to provide perspective on existing visitation and tourism to the region. The data and findings presented in this assessment can be used to validate future opportunities for community development, infrastructure investment, and programming along the trail with existing and/or potential visitation.

## **MARKET ASSESSMENT**

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### **VERMONT TOURISM**

Tourism plays a huge role in Vermont's economy and the state now sees almost 8 million visitors annually. On an average night, 10% of Vermont's beds are occupied by overnight visitors, with a higher percentage on weekends and holidays.<sup>1</sup> However, Vermont's tourism trends and demographics are mixed towards outdoor recreation participation.

Visitors to Vermont are primarily from the Northeast: Massachusetts, New York, New Hampshire, Connecticut, and New Jersey. Many of these visitors may drive to drive up to Vermont and can easily bring along recreational equipment such as a bike. However, the population of the northeast is increasingly stagnant and older, with a relatively large proportion of aging baby boomers. Vermont's visitors follow suit, with 58% of visitors over the age of 50 in a 2014 survey. Older visitors are less likely to pursue outdoor recreation activities in Vermont but tend to have more time and disposable income with which to travel. As a result, Vermont tourism is growing more slowly than in areas of the country with fast-growing populations.<sup>2</sup>

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<sup>1</sup> Tourism in Vermont 2015 Benchmark Report, Vermont Agency of Commerce and Community Development.

<sup>2</sup> 2017 Benchmark Report Tourism in Vermont, Vermont Agency of Commerce and Community Development

Vermont's travel information is generally disseminated through informal networks. Advice of friends and family is the main reason people travel to Vermont (62.1% of those surveyed) – no other means of communication was used by more than 13.5% of visitors surveyed. Amongst those under 50, the percentage influenced by friends and family is even higher (72%). Friends and family also strongly inform what visitors do once in the state. Of visitors surveyed, 29.8% relied on family and friends as their primary source for trip planning, just below the 30.2% using websites.<sup>3</sup>

### **Vermont Bicycle and Outdoor Recreation Tourism**

The most popular activities for Vermont visitors are sightseeing, shopping, and food and drink experiences. Hiking/backpacking is the most popular of outdoor recreation activities, with 33.7% of those surveyed participating. However, participation rates for hiking were 17% lower for those over 50, as compared to those under 50. Only 8% of those surveyed intended to participate in bicycling during their stay. A very small percentage, 0.7%, listed bicycling as the primary reason for their trip. Age data is not available for cycling as participation rates are lower.<sup>4</sup>

Specific areas may see a higher amount of bicycle tourism, based on biking infrastructure and marketing. The Lake Champlain Islands Chamber of Commerce reported that 40% of visitor inquiries include a request for information on bicycling or area trails.<sup>5</sup> Vermont guided bicycle tours are primarily in the in the Lake Champlain and Lamoille valleys, but others venture into the Northeast Kingdom, Woodstock area, the Upper Valley.

Although many people see Vermont as a destination for outdoor recreation, Vermonters frequently leave the state to outdoor recreate as well. In a survey of Vermonters, 74% left the state to recreate (primarily to the surrounding states of NY and NH).<sup>6</sup> This suggests that Vermonters are interested and willing to travel distances to discover new trails and may be willing to do so to Northern Vermont and the Lamoille Valley Rail Trail.

### **Vermont Snowmobiling**

The Vermont Association of Snow Travelers (VAST) and the Statewide Snowmobile Trail System (SSTS), of which the LVRT is a part, were established in 1967. In order to ride on the SSTS an individual must have a legally registered snowmobile, join a local snowmobile club (thereby becoming a member of VAST), and purchase a Trail Maintenance Assessment (TMA) or trail pass. Approximately 80 percent of the SSTS crosses private lands while the remaining 20 percent crosses state, federal and municipally owned lands throughout the state and connecting to adjacent states. Volunteers from 129 snowmobile clubs throughout the state work closely with these private, state, federal and municipal landowners to obtain permission to use their lands for snowmobiling between the dates of December 16th and April 15th annually. Funding for the SSTS comes from TMA sales, State of Vermont registrations, fines and penalties issued by law enforcement and portions of the state and federal tax on gasoline. The state gasoline tax is mandated by legislation which states that 40 percent (just under

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<sup>3</sup> Vermont Tourism and Recreation Survey, Vermont Tourism Research Center, 2014.

<sup>4</sup> Vermont Tourism and Recreation Survey, Vermont Tourism Research Center, 2014.

<sup>5</sup> Resource Systems Group, Economic Impact of Walking and Biking in Vermont, 2012.

<sup>6</sup> Resource Systems Group, Economic Impact of Walking and Biking in Vermont, 2012.

\$150,000) of the monies that flow into the Vermont Recreation Trails Fund gets passed to VAST through FPR.<sup>7</sup>

Vermont has about 35,000 registered snowmobilers in 138 clubs around the state (Vermont Association of Snow Travelers). Membership in VAST declined between 2000 and 2010 by over 10,000 members, declining to 31,992 members in 2010. However, as of the most recent SCORP survey, 11.3% of the Vermont population participated in snowmobiling, for an average of almost 16 average annual household participation days.

### **Agritourism**

Increasingly, agritourism has become an important part of Vermont's tourism and attraction. Visitors come to the state looking to visit farms and farmers markets, sample cheese, try a craft beer, and buy maple syrup. According to Lisa Chase of the Vermont Tourism Research Center, Vermont is a leader, both nationally and internationally, in agritourism and connecting tourism to local farmers and supporting the industry.<sup>8</sup> Agritourism has a large economic impact (\$19.5 million when last studied in 2004), and helps support the farmers, rural landscapes, and rural communities of the state.<sup>9</sup> Agritourism is both a component of other Vermont tourism trips, and increasingly, part of a guided, single-purpose vacation. According to Helen Labun of the Vermont Fresh Network, many of the agritourists are from out of state, but Vermonters participate as well. Millennials and Gen Xers are "leading the way" in terms of participating in food tourism in Vermont.<sup>10</sup>

According to research on what food tourists are looking for, authenticity, rural landscapes, and true local culture are of high interest. In Caledonia County, where agriculture remains a thriving industry, there may be an opportunity to capture some of this growing agritourism market and connect it with what is happening on the LVRT.

### **NATIONAL BICYCLE TOURISM**

Bicycle tourism is a booming sector in the American tourism economy. The Outdoor Industry Association (OIA) 2017 National Recreation Economy Report found that bicycle tourism contributes \$83 billion to the U.S. economy annually. This figure is up from \$71 billion in 2012 and makes bicycle tourism the second highest grossing outdoor recreation category, behind camping.<sup>11</sup> As of 2012, 27 million Americans had taken a bicycling related trip in the last five years and based on the OIA data, participation has likely increased since then.<sup>12</sup>

Numerous studies have put forth data on who bicycle tourists are and their use and spending patterns on a state or trail level.

A Maine Bicycle Tourism Study looked at visitor origins and ride distance. For one day rides, about 40% of riders were from within 50 miles of the trail and 50% were from 50-100 miles from the trail. For longer rides, riders tended to live further from the trail. For two to three-day rides, few users were from

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<sup>7</sup> Vermont Statewide Comprehensive Outdoor Recreation Plan (SCORP) 2014-2018

<sup>8</sup> Vermont Public Radio, "Food's Changing Role in Tourism and what it means for the State," 2018

<sup>9</sup> Vermont Tourism Research Center, Vermont Agri-Tourism Survey, 2004

<sup>10</sup> Vermont Public Radio, "Food's Changing Role in Tourism and what it means for the State," 2018

<sup>11</sup> Outdoor Industry Association, 2017 National Recreation Economy

<sup>12</sup> Resource Systems Group, Economic Impact of Walking and Biking in Vermont, 2012.

within 40 miles, about 40% were from 50-100 miles from the trail, and 50% were from 100 to 300 miles away. At a 4+ day trip, bike tourists become willing to drive 300+ miles.<sup>13</sup>

The desired ride varies significantly with the type of cyclists. Less experienced cyclists prefer shorter rides (~40 miles) and multi-use recreation paths (like the LVRT). More experienced cyclists are looking for longer rides and longer trips, typically on roads.<sup>14</sup>

The Heritage Rail Trail, in Central Pennsylvania, has a similar profile to segments of the the Lamoille Valley Rail Trail within Caledonia County in terms of length and rural setting and offers access to historical sites and information. Its survey data offers a benchmark for the Lamoille Valley Rail Trail. About 68.1% trail users are from the local county as of the 2012, a slight increase since survey data was first collected in 1999. People 56 to 65 is the most common age bracket of trail users and the fastest growing. The percentage of those biking as their trail activity has fallen dramatically, from almost 80% in 1999 to 55% in 2012. Increasingly, trail users consider their use of the trail to be primarily for health and exercise (59% of users in 2012, compared to 44.6% in 2004). Word of mouth is the greatest source of trail information, although it has declined slightly. The next most common source of information is driving past, followed by local brochures and roadside signage. The results of the survey highlight the importance of appealing to health and exercise enthusiasts, a mix of user types, and older folks.<sup>15</sup>

## **NATIONAL SNOWMOBILE TOURISM**

In 2018 there were 124,786 snowmobiles sold worldwide; 53,179 were sold in the U.S. and 47,024 were sold in Canada. There are over 1.2 million registered snowmobiles in the US and 600,000 registered snowmobiles in Canada.<sup>16</sup>

Snowmobiling contributes \$26 billion of economic impact annually to the United States economy and \$8 Billion annually in Canada. Over 100,000 full time jobs are generated by the snowmobile industry in North America. Those jobs are involved in manufacturing, dealerships and tourism related businesses.<sup>17</sup>

The average age of a snowmobiler is 45 years old. The average snowmobiler rides their snowmobile 1,250 miles per year in North America. The average snowmobiler spends about \$2,000 each year on snowmobile-related recreation. 49% of snowmobilers trailer their snowmobiles to ride. 51% snowmobile from their primary residence or have a vacation home where they keep and use their snowmobiles.<sup>18</sup>

There are 3,000+ snowmobile clubs worldwide, involved in trail grooming, charity fund raising, & family activities.<sup>19</sup>

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<sup>13</sup> Wilbur Smith Associates, Bicycle Tourism in Maine: Economic Impacts and Marketing, 2001.

<sup>14</sup> Ibid.

<sup>15</sup> Rails to Trails Conservancy, Heritage Rail Trail County Park 2012 User Survey and Economic Impact Study.

<sup>16</sup> International Snowmobile Manufacturers Association, 2018 Snowmobiling Fact Book.

<sup>17</sup> Ibid

<sup>18</sup> Ibid

<sup>19</sup> Ibid

While Vermont itself has experienced increasingly difficult snow years over the past two decades, it has held more snow and had better riding conditions than many of our neighboring states to the south. While challenging snow seasons has created some attrition within the sport, in terms of destination snowmobiling, locations with higher altitudes and further north are generally attracting riders from farther away, which bodes well for the LVRT.

## **IMPACT OF COVID ON RECREATION & TOURISM**

According to the US Census, earnings and employment in Travel, Tourism, and Outdoor Recreation both declined substantially at the onset of the pandemic, but average earnings have fully rebounded since then. Employment is still down but recovering slowly. Women, young people, and racial and ethnic minority groups in these industries have continued to be disproportionately impacted by the pandemic<sup>20</sup>.

Penn State's Department of Recreation, Park, and Tourism Management in collaboration with the Leave No Trace Center for Outdoor Ethics published a new article in the journal *Land* that examined how outdoor recreation has changed during the pandemic<sup>21</sup>. Results indicated that nearly half of adults from across the United States now participate in outdoor recreation on at least a monthly basis, and approximately 20% may be new to outdoor recreation during the pandemic. More than 13% of Americans ceased participation in outdoor recreation during the same period.

U.S. passenger traffic has averaged about 89 percent of the pre-pandemic levels since mid-February, according to Transportation Security Administration (TSA) data<sup>22</sup>. This indicates that while regional travel rates are still high, potential visitors are opting to take trips out of the region. However, of first quarter of 2022 saw a tax revenue increase of 34 percent in hotel and lodging options in Vermont than 2019, indicating an increase in over-night stays.

## **IMPACT OF INFLATION ON RECREATION TOURISM**

The travel price index (TPI) published by the U.S. Travel Association gives an overview of the monthly price changes across different travel and tourism industries in the United States. According to the July 2022 TPI, the transportation segment was the main driver of inflation for the U.S. travel and tourism sector, with the price index of airline fares rising by 27.7 percent over the previous year.<sup>23</sup> In April 2022, The Federal Reserve revealed prices over the last year have increased for several travel-related industries, including hotel rooms (25.1 percent), rental cars (23.4 percent), restaurants (6.9 percent)

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<sup>20</sup> Bureau, U. S. C. (2022, August 30). Initial impact of covid-19 on travel, tourism, outdoor recreation varied widely across states and demographic groups. Census.gov. Retrieved September 9, 2022, from <https://www.census.gov/data/academy/webinars/2022/initial-impact-of-covid-19-on-travel-tourism-outdoor-recreation.html>

<sup>21</sup> Taff BD, Rice WL, Lawhon B, Newman P. Who Started, Stopped, and Continued Participating in Outdoor Recreation during the COVID-19 Pandemic in the United States? Results from a National Panel Study. *Land*. 2021; 10(12):1396. <https://doi.org/10.3390/land10121396>

<sup>22</sup> TSA checkpoint travel numbers (current year versus prior year(s)/same weekday). TSA checkpoint travel numbers (current year versus prior year(s)/same weekday) | Transportation Security Administration. (n.d.). Retrieved September 9, 2022, from <https://www.tsa.gov/coronavirus/passenger-throughput>

<sup>23</sup> Statista Research Department. (2022, August 24). Topic: Impact of inflation on travel and Tourism Worldwide. Statista. Retrieved September 9, 2022, from <https://www.statista.com/topics/9662/impact-of-inflation-on-travel-and-tourism-worldwide/#dossierKeyfigures>

and recreation (4.8 percent).<sup>24</sup> The rising price of fuel may also influence travel habits by promoting “close to home” and weekend trips instead of longer car trips.

## TRAIL VISITATION ANALYSIS

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### CURRENT TRAIL USE MONITORING

Trail use volumes along the LVRT in Caledonia County are currently monitored by NVDA and VAST using automatic trail counters. These locations are primarily along the eastern end of the trail, which has been open for many years.

Town	Location	Entity
St. Johnsbury	Between Mt. Vernon St and I-91	NVDA
St. Johnsbury	Northwest of I-91 Tunnel	VAST
Danville	LVRT Bridge 17D	VAST
Danville	Bridge west of Marty’s 1 <sup>st</sup> Stop	VAST
Danville	Joe’s Pond	VAST
Hardwick	LVRT Bridge 40	VAST

The NVDA counter is installed year-round and provides a continuous count; three full years of data (September 2019 to August 2022) have been recorded. The VAST counters are installed seasonally and are moved around between monitoring locations; therefore, continuous year-round data is not available for these locations.

### CURRENT TRAIL USE DATA ANALYSIS

For the purposes of analysis, it was determined that the continuous NVDA counts provided the most robust data upon which to base estimates of current trail use and projections of future use, due to gaps and inconsistencies in the VAST trail counter data. Additionally, the consultant team identified (in coordination with County partners) three LVRT trail segments that represent anticipated differences in trail use volumes based on proximity to population centers and levels of visitation:

Segment	Recorded Trail Use Volume*
St. Johnsbury to the northern end of Joe’s Pond (16.3 miles)	39,763/year between Mt. Vernon St and I-91
Northern end of Joe’s Pond to Greensboro Bend (11.1 miles)	No data
Greensboro Bend to the Hardwick town line (10.5 miles)	No data

*\*Refers to the total number of “hits” recorded by a trail counter. Out-and-back trail users are recorded twice.*

An analysis was also performed to look at summer trail use (April – November) versus winter trail use (December – March). While there are variations depending on the segment of trail, it is estimated that approximately 75% of trail use occurs in the summer, while 25% of trail use occurs in the winter.

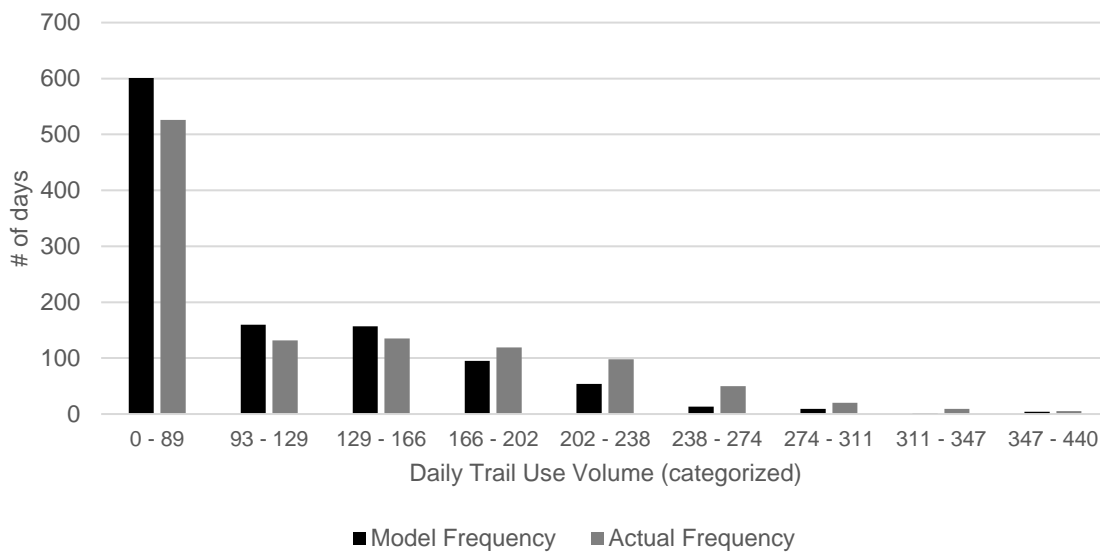
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<sup>24</sup> U.S. Bureau of Labor Statistics. (2022, August 10). Consumer price index summary - 2022 M07 results. U.S. Bureau of Labor Statistics. Retrieved September 9, 2022, from <https://www.bls.gov/news.release/cpi.nr0.htm>

## ESTIMATING BASELINE TRAIL USE FOR THE COMPLETED TRAIL

Next, the consultant team produced projected estimates of the baseline level of trail use in Caledonia County once the trail is completed.

To start, a regression model for the section of trail from St. Johnsbury to Joe’s Pond was developed using Strava Metro data. Strava is a popular smartphone application that is used for tracking exercise. The Strava Metro platform incorporates user data for walking, running, and bicycling activities and produces a model of relative use levels along segments of road and trail. The consultant team then developed a regression model to correlate trail use at the Mt. Vernon Rd/I-91 trail counter to Strava Metro data at the same location, as well as at Peacham Road in Danville and at Joe’s Pond. The resulting model was found to be accurate for the purposes of estimating annual visits per year along the trail.



Next, the consultant team incorporated several assumptions to produce an estimate of the overall number of trail visits along the full segment of trail from St. Johnsbury to Joe’s Pond. The following assumptions were incorporated:

- The distances that trail users travel (i.e., what percentage of users at the Mt. Vernon Rd/I-91 counter will reach Peacham Rd, what percentage of users at Peacham Rd will reach Joe’s Pond, etc)
- The percentage of trail users that do an out-and-back trip on the trail.

Next, assumptions were prepared regarding the relative use levels along the Joe’s Pond – Greensboro Bend and Greensboro Bend – Hardwick segments compared to the St. Johnsbury – Joe’s Pond segment. Additional assumptions were developed for the overall increase in local trail use once the trail is completed, as well as additional use by overnight trail users. Analysis of trail use patterns on comparable rail trails informed the development of assumptions. All assumptions are detailed in the table below:

<b>Assumption</b>	<b>Percent (%)</b>
% trail users recorded in St. J traveling between St. J and Danbury (10.9 mi)	5%
% of trail users recorded in Danbury traveling between Danbury and Joe's Pond (3.4 mi)	50%
Joe's Pond to Greensboro: % of trail visits compared to St J - Joe's Pond segment	50%
Greensboro to Hardwick: % of trail visits compared to St J - Joe's Pond segment	90%
% of out and back trail users (all segments)	90%
% increase in local trail use once complete (all segments)	20%
% of overnight users once complete (all segments)	5%

The resulting estimates of baseline annual trail visitation are presented in the table below.

<b>Segment</b>	<b>St. Johnsbury – Joe's Pond</b>	<b>Joe's Pond- Greensboro</b>	<b>Greensboro - Hardwick</b>	<b>LVRT in Caledonia County</b>
<b>Total Visits Per Year</b>	51,496	25,748	46,346	123,590
<b>Local Day Users</b>	33,472	19,311	34,760	87,543
<b>Non-Local Day Users</b>	14,573	5,150	8,481	28,204
<b>Non-Local Overnight Users</b>	3,450	1,287	3,105	7,843

## **GROWTH SCENARIO PROJECTIONS**

The consultant team identified three aspirational growth scenarios for the LVRT based on the level of trail promotion and associated community and economic development investments:

- **Baseline Growth:** basic trail promotion activities and information resources.
- **Moderate Growth:** trail promotion, informational resources, regional coordination, some investment in community development projects (e.g., trailheads, trailside parks), some investment in tourism/camping/lodging development.
- **Significant Growth:** significant trail promotion and regional coordination, significant investment in community development projects, significant investment in tourism/lodging/camping development.

<b>Growth Scenario</b>	<b>Baseline</b>	<b>Moderate</b>	<b>Significant</b>
<b>% Increase in Local Day Users</b>	10%	15%	25%
<b>% Increase in Non-Local Day Users</b>	10%	25%	50%
<b>% Increase in Non-Local Overnight Users</b>	10%	25%	50%



**Baseline Growth Scenario Projections:**

<b>Segment</b>	<b>St. Johnsbury – Joe’s Pond</b>	<b>Joe’s Pond- Greensboro</b>	<b>Greensboro - Hardwick</b>	<b>LVRT in Caledonia County</b>
<b>Total Visits Per Year</b>	56,645	28,323	50,981	135,949
<b>Local Day Users</b>	36,820	21,242	38,236	96,297
<b>Non-Local Day Users</b>	16,031	5,665	9,330	31,025
<b>Non-Local Overnight Users</b>	3,795	1,416	3,416	8,627

**Moderate Growth Scenario Projections:**

<b>Segment</b>	<b>St. Johnsbury – Joe’s Pond</b>	<b>Joe’s Pond- Greensboro</b>	<b>Greensboro - Hardwick</b>	<b>LVRT in Caledonia County</b>
<b>Total Visits Per Year</b>	61,023	30,254	54,457	145,733
<b>Local Day Users</b>	38,493	22,208	39,974	100,674
<b>Non-Local Day Users</b>	18,217	6,437	10,602	35,255
<b>Non-Local Overnight Users</b>	4,313	1,609	3,881	9,804

**Significant Growth Scenario Projections:**

<b>Segment</b>	<b>St. Johnsbury – Joe’s Pond</b>	<b>Joe’s Pond- Greensboro</b>	<b>Greensboro - Hardwick</b>	<b>LVRT in Caledonia County</b>
<b>Total Visits Per Year</b>	68,876	33,794	60,829	163,499
<b>Local Day Users</b>	41,840	24,139	43,450	109,429
<b>Non-Local Day Users</b>	21,860	7,724	12,722	42,306
<b>Non-Local Overnight Users</b>	5,175	1,931	4,658	11,764

**ECONOMIC IMPACT ANALYSIS**

Economic impacts of the LVRT were projected using a computer-based model—the Money Generation Model (MGM2). The MGM2 model was developed by the National Park Service and is used to model the economic impact of national parks and other recreational assets across the country. The model demonstrates the immense value of trails and recreational assets as an economic engine, by estimating the economic impact of spending associated with trail use at the trail systems in terms of changes in jobs, tax impacts, and total sales (gross regional product).

MGM2 economic modeling requires the estimation of trail traffic volume and user spending in order to simulate the effect of these activities on the economy. While MGM2 modeling utilizes observed industry

interdependencies calibrated to the local and regional economy, the results of any economic model are only as accurate as the data used to describe the modeled activity (i.e., trail use). Therefore, certain estimations and assumptions related to the trail systems had to be made.

First, an estimate of the trail visitation was needed. This was completed through a visitation analysis in an earlier phase within the project.

Second, an assumption of trail traffic volume by user type (local day user vs. regional day visitor vs. overnight visitor) is necessary for this analysis because, on average, these user types spend significantly different amounts in connection with their trail visits (see discussion of spending profiles below). The trail is relatively local serving, especially given its current character and promotion. This assumption is derived from the high variability in trail count data, high weekday use, and anecdotal information. While it is likely the trail will see more tourism/visitor use in the future, it is primarily a local-serving community asset at this time. However, all of Vermont experiences tourism influences, and Caledonia County is no exception. Thus, a small percentage of trail users are estimated to be non-local day and overnight visitors to the region. The trail user type varies by segment of the trail with more populated segments and areas with a higher existing rate of tourism experiencing a higher proportion of overnight visitors.

<b>Segment</b>	<b>Local Visitors (%)</b>	<b>Day Visitors (%)</b>	<b>Overnight Visitors (%)</b>
St. Johnsbury – Joe’s Pond	65	28.3	6.7
Joe’s Pond - Greensboro	75	20.0	5.0
Greensboro - Hardwick	75	18.3	6.7

Finally, Visitor Spending Profiles must be estimated for the three primary categories of trail users: Local Day Users, Non-Local Day Users, and Non-Local Overnight Users. The estimate of Local Day User spending was calculated by taking the average of 16 recent trail studies that included a trail user spending survey. On average, this group is estimated to spend approximately \$13.12 per person per day. The estimate of Non-Local Day User spending was taken from the 2011 Benchmark Study of the Economic Impact of Visitor Spending on the Vermont Economy conducted on behalf of the Agency for Commerce and Community Development (ACCD) and adjusted for inflation. This estimate reflects the average spending of all Non-Local Day Visitors to the State of Vermont and is calculated at approximately \$70.14 per person per trip. The estimate of Non-Local Overnight User spending is also taken from this 2011 benchmarking study, calculated at \$160.23 per person per trip.

The spending profile of these user groups is presented below. Most of the spending associated with locals is on shopping/retail items, restaurants and bars, and snacks, as the most common purchases for locals are meals and other food. Visitors’ largest spending category is lodging, followed by restaurants and bars, and then gas and other transportation.

Average Spending Profile Category	Local Day Users	Non-Local Day Users	Non-Local Overnight Users
Restaurants and Bars	\$3.17	\$17.29	\$40.27
Grocery and Snacks	\$1.47	\$3.11	\$14.27
Shopping and Retail	\$4.86	\$19.30	\$25.89
Gas and Other Transportation	\$2.38	\$25.96	\$36.16
Lodging	\$0.00	\$0.00	\$34.73
Entertainment and Recreation	\$1.24	\$4.49	\$8.91
<b>Total</b>	<b>\$13.12</b>	<b>\$70.14</b>	<b>\$160.23</b>

With reasonable estimates of annual trail traffic volume, trail use by trail user type, and spending profiles for each visitor type, the MGM2 model can be completed and run. The model utilizes input-output modeling and industry relationship data from the US Census to estimate total economic impacts. Purchases for final use (i.e. trail user spending) drive the model. Industries that produce goods and services for trail user consumption must purchase products, raw materials, and services from other companies to create their product. These vendors must also procure goods and services. This cycle continues until all the money is leaked from the region's economy.

There are two types of effects measured within a MGM2 Model: direct and indirect effects. Direct effect is the known or predicted change in the local economy that is to be studied (i.e. the trail user spending). For example, direct impact would measure the impact a visitor's purchase of ice cream. The indirect effect is the business-to-business transactions required to satisfy the direct effect. In this case, the indirect impact would measure the purchase of cream from a dairy farm to produce the ice cream purchased by the tourist. Total impacts reflect the total changes to the economy as the result of trail user spending (i.e., Direct effects + Indirect effects = Total Impacts).

The MGM2 model measures these impacts through four metrics:

- 1) **Total Sales** which account for the total gross sales within each spending category (i.e. total sales of restaurants & bars)
- 2) **Jobs Added** which measures the additional need one person employed full-time for one year, although this can occur through the combination of part time and temporary positions
- 3) **Labor Income** which measures the total income employed people earn from working
- 4) **Value Added** which measures the total economic value added by sector into the economy.

## **CURRENT ECONOMIC IMPACT ANALYSIS SUMMARY**

### **Overall Lamoille Valley Rail Trail Impact**

Several visitation scenarios were processed within the MGM2 Economic Model. Each scenario was derived from the visitation estimates identified in the previous chapter: the Baseline Growth Scenario, Moderate Growth Scenario and Significant Growth Scenario.

### **Baseline Growth Scenario**

In this scenario, visitation was projected as a slight increase of 10 percent for all user types. Within this scenario, trail users generated approximately \$3,914,000 in sales, 63 jobs and \$538,000 in federal, state, and local sales and income taxes in the local economy from direct and indirect impacts.

<b>Segment</b>	<b>Total Visits</b>	<b>Sales</b>	<b>Jobs Added</b>	<b>Labor Income (Thousands)</b>	<b>Value Added (Thousands)</b>
St. Johnsbury – Joe’s Pond	56,645	\$1,840,000	30.0	\$603,000	\$1,100,000
Joe’s Pond - Greensboro	28,323	\$751,000	12.0	\$247,000	\$450,000
Greensboro - Hardwick	50,981	\$1,436,000	23.0	\$469,000	\$857,000
Caledonia County <sup>25*</sup>	135,949	\$3,914,000	63.0	\$1,282,000	\$2,341,000

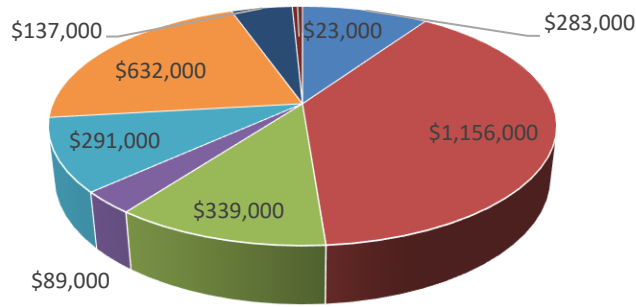
### **Projected Sales by Segment**

Spending is broken into different segments which provide insight into the strongest economic sectors within the county. Restaurants and bars are expected to generate the highest sales for the County at approximately \$1,156,000 with other retail generating \$632,000 annually.

<b>Segment</b>	<b>Sales (Thousands)</b>	<b>Jobs Added</b>	<b>Labor Income (Thousands)</b>	<b>Value Added (Thousands)</b>
Motel, hotel cabin or B&B	\$283,000	3.6	\$72,000	\$150,000
Restaurants & bars	\$1,156,000	22.6	\$387,000	\$601,000
Admissions & fees	\$339,000	8.2	\$83,000	\$189,000
Grocery stores	\$89,000	1.7	\$44,000	\$65,000
Gas stations	\$291,000	3.6	\$110,000	\$198,000
Other retail	\$632,000	13.0	\$274,000	\$467,000
Wholesale Trade	\$137,000	1.0	\$47,000	\$101,000
Local Production of goods	\$23,000	0.1	\$3,000	\$6,000
<b>Total Direct Effects</b>	<b>\$2,950,000</b>	<b>53.8</b>	<b>\$1,020,000</b>	<b>\$1,778,000</b>
Secondary Effects	\$964,000	9.2	\$262,000	\$562,000
<b>Total Effects<sup>26</sup></b>	<b>\$3,914,000</b>	<b>63.0</b>	<b>\$1,282,000</b>	<b>\$2,341,000</b>

<sup>25</sup> Approximate county estimates may differ from total segment impact due to rounding

<sup>26</sup> Totals may differ from actual due to rounding



- Motel, hotel cabin or B&B
- Restaurants & bars
- Admissions & fees
- Grocery stores
- Gas stations
- Other retail
- Wholesale Trade
- Local Production of goods

Of these sales, the Baseline growth Scenario is expected to generate nearly \$321,000 in Federal, State, and local sales tax, and \$216,000 in income tax.

### **Moderate Growth Scenario**

In this scenario, visitation was projected as a moderate increase of 15 percent for local visitors and 25 percent for non-local day and non-local overnight visitors. Within this scenario, trail users generated approximately \$4,196,000 in sales, 68 jobs and \$576,000 in federal, state, and local sales and income taxes in the local economy from direct and indirect impacts.

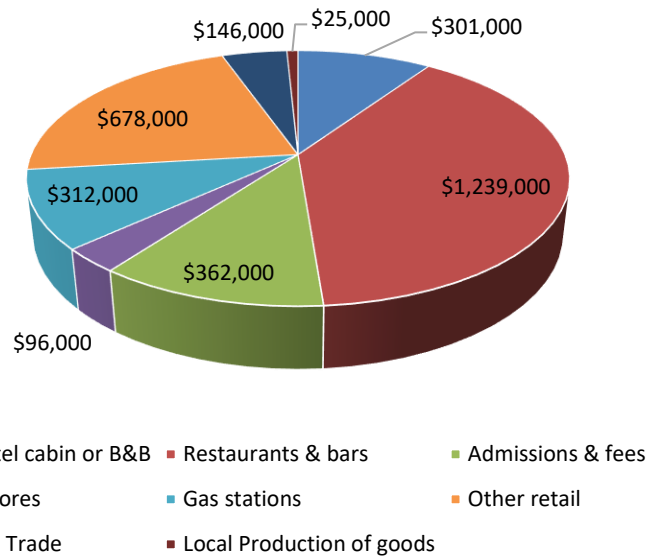
Segment	Total Visits	Sales	Jobs Added	Labor Income (Thousands)	Value Added (Thousands)
St. Johnsbury – Joe’s Pond	61,023	\$1,982,000	32.0	\$649,000	\$1,185,000
Joe’s Pond - Greensboro	30,254	\$803,000	13.0	\$264,000	\$481,000
Greensboro - Hardwick	54,457	\$1,534,000	25.0	\$501,000	\$916,000
Caledonia County <sup>27*</sup>	145,733	\$4,196,000	68.0	\$1,374,000	\$2,509,000

<sup>27</sup> Approximate County estimates may differ from total segment impact due to rounding

### Projected Sales by Segment

Spending is broken into different segments which provide insight into the strongest economic sectors within the county. Restaurants and bars are expected to generate the highest sales for the County at approximately \$1,239,000, with other retail generating approximately \$678,000 annually.

Segment	Sales (Thousands)	Jobs Added	Labor Income (Thousands)	Value Added (Thousands)
Motel, hotel cabin or B&B	\$301,000	3.9	\$77,000	\$161,000
Restaurants & bars	\$1,239,000	24.2	\$414,000	\$645,000
Admissions & fees	\$362,000	8.8	\$89,000	\$203,000
Grocery stores	\$96,000	1.8	\$47,000	\$69,000
Gas stations	\$312,000	3.8	\$118,000	\$213,000
Other retail	\$678,000	13.9	\$294,000	\$501,000
Wholesale Trade	\$146,000	1.1	\$51,000	\$109,000
Local Production of goods	\$25,000	0.1	\$3,000	\$6,000
<b>Total Direct Effects</b>	<b>\$3,163,000</b>	<b>57.6</b>	<b>\$1,094,000</b>	<b>\$1,906,000</b>
Secondary Effects	\$1,033,000	9.9	\$281,000	\$603,000
<b>Total Effects<sup>28</sup></b>	<b>\$4,196,000</b>	<b>67.5</b>	<b>\$1,374,000</b>	<b>\$2,509,000</b>



Of these sales, the Moderate Growth Scenario is expected to generate nearly \$344,000 in Federal, State, and local sales tax, and \$232,000 in income tax.

<sup>28</sup>Totals may differ from actual due to rounding

### Significant Growth Scenario

In this scenario, visitation was projected as a significant increase of 25 percent for local visitors and 50 percent for non-local day and non-local overnight visitors. Within this scenario, trail users generated approximately \$4,707,092 in sales, approximately 76 jobs and \$646,000 in federal, state, and local sales and income taxes in the local economy from direct and indirect impacts.

Segment	Total Visits	Sales	Jobs Added	Labor Income (Thousands)	Value Added (Thousands)
St. Johnsbury – Joe’s Pond	68,876	\$2,237,000	36.0	\$733,000	\$1,338,000
Joe’s Pond - Greensboro	33,794	\$897,000	14.0	\$294,000	\$537,000
Greensboro - Hardwick	60,829	\$1,291,000	23.0	\$445,000	\$776,000
Caledonia County <sup>29*</sup>	163,499	\$4,707,092	75.7	\$1,541,940	\$2,815,125

### Projected Sales by Segment

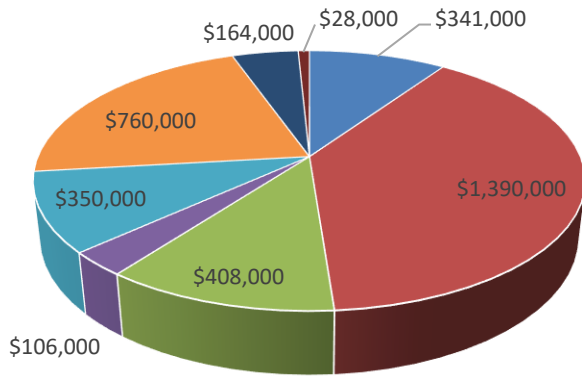
Spending is broken into different segments which provide insight into the strongest economic sectors within the county. Restaurants and bars are expected to generate the highest sales for the County at approximately \$1,390,000, with other retail generating approximately \$760,000 annually.

Segment	Sales (Thousands)	Jobs Added	Labor Income (Thousands)	Value Added (Thousands)
Motel, hotel cabin or B&B	\$341,000	4.3	\$87,000	\$181,000
Restaurants & bars	\$1,390,000	27.2	\$465,000	\$723,000
Admissions & fees	\$408,000	9.9	\$100,000	\$227,000
Grocery stores	\$106,000	2.0	\$53,000	\$78,000
Gas stations	\$350,000	4.3	\$132,000	\$239,000
Other retail	\$760,000	15.6	\$330,000	\$562,000
Wholesale Trade	\$164,000	1.2	\$57,000	\$122,000
Local Production of goods	\$28,000	0.1	\$4,000	\$7,000
<b>Total Direct Effects</b>	<b>\$3,548,000</b>	<b>64.7</b>	<b>\$1,227,000</b>	<b>\$2,139,000</b>
Secondary Effects	\$1,159,000	11.1	\$315,000	\$676,000
<b>Total Effects<sup>30</sup></b>	<b>\$4,707,000</b>	<b>75.7</b>	<b>\$1,542,000</b>	<b>\$2,815,000</b>

Of these sales, the Significant Growth Scenario is expected to generate nearly \$386,000 in Federal, State, and local sales tax, and \$260,000 in income tax.

<sup>29</sup> Approximate County estimates may differ from total segment impact due to rounding

<sup>30</sup> Totals may differ from actual due to rounding

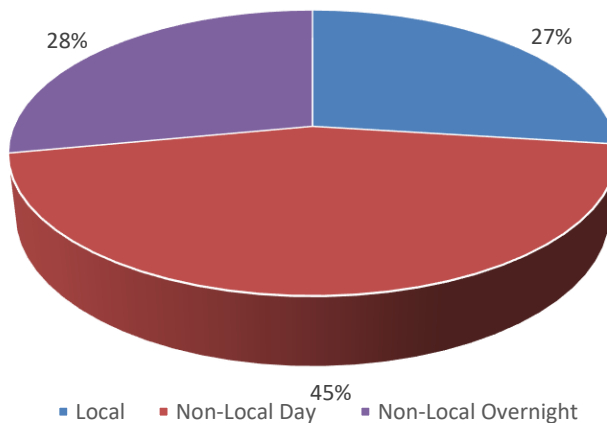


- Motel, hotel cabin or B&B
- Restaurants & bars
- Admissions & fees
- Grocery stores
- Gas stations
- Other retail
- Wholesale Trade
- Local Production of goods

### SPENDING BY USER TYPE

Although only six percent of users are comprised of non-local overnight users, this user group generates nearly 30 percent of total revenue. Non-local day users, which consist of approximately 22 percent of total visits, make up almost half of the total sales for the area. This should be considered when identifying strategies to increase visitation in order to retain a high ratio of non-local users.

User Type	Percent of Users	Percent of Spending	Percent of Sales
Local	72%	5%	27%
Non-Local Day	22%	29%	45%
Non-Local Overnight	6%	66%	28%





## CASE STUDIES

The case studies below demonstrate how other trails, communities, landowners, and businesses have capitalized on the economic potential of their trail assets. Much of the information, images, and graphics in these case studies are drawn from the managers and non-profits supporting the trails. Visit their websites for more information at <https://ptittrainundunord.com/>, <https://gobiking.ca/quebec-rides/ptit-train-du-nord/>, and <https://www.ptny.org/cycle-the-erie-canal>.

### P'TIT TRAIN DU NORD

The P'tit train du Nord is a 234 km (145 mile) multi-use path which runs through the Laurentian Mountains north of Montréal. The rail trail has gentle grades, offers truly spectacular scenery, and is lined with a robust assortment of tourist facilities and amenities. There are a few long gradual slopes to either climb or descend, but the relative lack of hills on the trail is notable considering it winds its way through the Laurentian Mountains.



The “P’tit train du Nord” literally means the “Little Train of the North.” The trail was built on an old tourist rail line that used to bring thousands of people into the Laurentians for summer vacations and winter skiing from the 1930s to the 1980s. Unlike many rail trails, which are often laid out in straight lines and run through open fields or industrial parks in the backside or towns, the P’tit train du Nord passes directly through many downtowns and village centers and curves around rivers, lakes, and the base of mountains. The trail also benefits greatly from the tourism infrastructure that was developed around the tourist train line.

Given the mellow grades, and the supporting community infrastructure, the P’tit train du Nord is one of the premier rail trails in North America and is particularly desirable for overnight and multi-day trips.



#### TRAIL

Length of trail : **234 km**

Asphalted km: **168 km (72 %)**

Stone dust km: **66 km (28 %)**

Cross-country skiing km: **44 (St-Jérôme - Val-**

**David)**

Cross-country skiing km: **27 ( La Conception - Mont-**

**Tremblant and Saint-Faustin-Lac-Carré)**

Snowmobiling km: **24 (Ste-Agathe - Saint-Faustin)**

Snowmobiling km: **95 (Labelle - Mont-Laurier)**



#### TOWNS

Municipalities : **26**

RCM : **6**



#### TRAIN STATIONS

Intermodal train stations: **3**

Historic train stations: **13**

## Tourism Development and Amenities

The trail runs through many lively tourist towns throughout its length. It is also well serviced by convenience stores, hotels, inns, bed & breakfasts, campgrounds, as well as pubs, bars, and restaurants, many with outdoor terraces. Many of these are all located along the trail itself or a very short distance away. Moreover, 13 historic train stations along the route have been converted into restaurants, tourist information centers, and rest areas. One even houses a well-equipped bicycle shop that provides rentals and shuttle services.

In Nomminque, the old train station has been converted into a tourist information center and an exhibition area for local artists. Labelle's old train station houses a restaurant where people can enjoy a meal while watching the comings-and-goings along the trail. Across from the old station in Labelle is a caboose which is now a small railroad museum. The old train stations in Tremblant, Sainte-Agathe-des-Monts, and Saint-Faustin-Lac-Carré also provide public restrooms, maps, and tourist information. These are often paired with public parks and plazas providing green spaces and gathering areas for local residents and a perfect rest stop for trail travelers. Many of the parks along the trail provide swimming access to rivers and lakes it passes by; event spaces and small amphitheatres; splash pads and playgrounds for kids; and picnic tables, benches, and other seating.

The towns along the trail are spread out reasonably well for bicycle travel, with communities every 15 miles or so and there are rest areas and comfort shelters within the trail corridor where there are longer distances between towns and/or there isn't good access to a downtown or shopping district. The broader region supports a robust tourism industry from the Montréal metro area, which has significant synergies with the trail activity.

The trail is of course a significant tourism draw, but the surrounding tourism environment also ensures there is food, lodging, and other hospitality offerings to support even more trail tourism. Most towns provide a range of restaurant and lodging options, including grab-and-go or fast-food, sit-down restaurants, and convenience and grocery stores serving a wide array of pallets and price points. Lodging options are similarly diverse with private campgrounds, RV parks, hotels, condos and resort properties, bed & breakfasts, Air BnBs and vacation rentals, and everything in between. Campgrounds, hotels, restaurants, and other businesses have signs along the trail and have created direct access and trail connections to their businesses.

Shuttle service is another important component supporting tourism and overnight stays. These shuttle busses have trailers that are especially designed for moving bicycles and will transport a cyclist and his or her bike and luggage from one end



*The renovated train station in Nomminque*



*One of the rest shelters along the trail*



*Shuttle service*

of the trail to the other. The shuttle companies also offer additional services including providing assistance with trip planning and picking up and dropping off people and their bikes between various centers along the trail. This last service can prove handy for people who, for whatever reason (bad weather, sore knee) don't feel up to pedaling a particular leg of their trip. For those who like to travel light on their bicycles, it is even possible to have a shuttle company transport their bags from one hotel to the next.



### SERVICES

Maintenance stations:	24
Restrooms:	32
Picnic tables :	87
Water points:	34
Shelters:	25



### NATURE

Rivers:	6
Lakes:	7
Deers:	∞

The P'tit train du Nord also has robust information infrastructure to support tourism and trail activity. The trail's supporting non-profit publishes a small trail information booklet that is updated each year. It provides a number of maps and gives a mile-by-mile listing of restaurants, inns, bed & breakfasts, campgrounds, and other services that are available along the trail. It is easy to pick up a free copy of this booklet in French or English at many train station info centers or businesses on the P'tit train du Nord. An interactive map and online version of this booklet is also available. Mile markers, signage, and other wayfinding elements also help connect trail users to the services and amenities available in each community.

### Community Connections

Communities along the P'tit train du Nord have made a significant effort to develop additional trail and bike lane connections with the trail, further expanding the economic potential of trail tourism. Mont Tremblant is a good example of this. The trail passes through the "old town" of Tremblant where there are several restaurants, hotels, and service available, but the community has also developed a paved bike path connection to link the P'tit train du Nord with its resort village about 4 miles away. The paved path provides direct trail access to many more residents as well as providing a safe off-road connection for trail tourists.



*Old town Tremblant*

Where convenient trail connections are not feasible, other strategies to support trail tourism may be

used. An example of this is Sainte-Adèle, which is another major tourist center for the Laurentians. Unfortunately, the trail is somewhat removed from the downtown area, and getting into Sainte-Adèle involves an uphill climb and getting past Autoroute 15 (similar to a US interstate). While downtown is relatively inaccessible by bike, the town's old train station has become a very popular stopping point along the P'tit train du Nord. The old train station provides ample parking and houses a bicycle shop, restrooms, and a nice restaurant with indoor/outdoor dining which allows Sainte-Adèle to still have a significant presence on the trail and to capture some of the economic benefits of trail tourism.



*La Route Verte*

The region has also developed a series of trails and bike lanes that make it reasonably easy to cycle to the P'tit train du Nord from Montréal. This involves making use of Québec's "Route Verte" network of bicycle lanes, paths, and trails to cross Montréal and the sprawling suburb community of Laval. From here cyclists head to the "Parc Lineaire des Basses Laurentides" an 18-kilometer (11-mile) trail which runs from Blainville to Saint-Jérôme.

### **Small Town Case Study—Labelle**

Labelle is a small town directly on the trail with approximately 2,700 residents. Labelle's old train station houses a restaurant and across the trail from the old station is a caboose which is now a small museum about the P'tit train du Nord. Labelle is also home to an interesting restaurant and business—the Kayak Café. It has a nice terrace which overlooks the Rouge River, and under the restaurant is a rental outlet for kayaks and canoes. There are several restaurants, inns, and boutiques in the downtown and the Iroquois Falls Campground is right off the trail.



*Railway museum and restaurant in Labelle*

### **Resort Community Case Study—Tremblant**

The P'tit train du Nord passes next to Mercier Lake and what was the original town of Mont Tremblant. This area is tourist-oriented and quite busy. Like many other places on the trail, the town's old train station has been converted into a tourist information center and exhibition space for local artists. Although small, the original town of Mont Tremblant has much to offer cyclists stopping for an overnight stay. This includes grocery stores, bicycle shops, pubs, restaurants, a youth hostel, bed & breakfasts, and a few relatively large hotels/motels. All this is located right next to, or within easy walking distance of the trail.

Cyclists who have had their fill of authentic little towns and quaint bed & breakfasts can also seek out a different experience at the nearby Mont Tremblant Resort Village. A relatively large ski area and resort community, the resort village is full of specialty boutiques, stores, hotels, restaurants, and, of course, tourists. The resort village is about four miles from the trail. The two are connected by a paved bicycle path. There is a central agency for



### **DISCOVER**

Microbreweries: **8**

Campgrounds: **10**

Public markets: **8**

Ice cream parlors: **∞**

booking accommodations at the resort and the area benefits from significant tourism promotion and visitor information.

### **Small City Case Study—Sainte-Agathe**

Sainte-Agathe is a fairly large population center in the Laurentians with approximately 11,200 residents. It has a very attractive downtown area that offers a wide variety of facilities, including a good number of restaurants, bar, and terraces. There are often free events, music, and entertainment in Lagny Park near the waterfront just off the trail. Many of the town's inns and bed & breakfasts are located along the shore of Lac des Sables. The P'tit train du Nord runs by the outskirts of Sainte-Agathe-des-Monts, but it only takes a few minutes to get to the downtown core by bike. Like many other places along the trail, maps and tourist information is available at the old train station and trail tourists are directed from towards the restaurants, lodging, or amenities they may need from there.



*Lagny Park events*

### **ERIE CANALWAY TRAIL**

The Erie Canalway Trail is a cycling destination for riders of all abilities. Following one of the world's most famous man-made waterways, it spans New York State between Albany and Buffalo. Whether enjoying a leisurely ride from one village to another or spending a week completing the entire 400 miles, the Erie Canalway Trail offers endless adventures exploring the charming towns, living history, scenic beauty, and cultural attractions of New York State.



Completed in 1825, the Erie Canal connected the Hudson River to Lake Erie spurring America's western expansion. The canal was a major transportation corridor and supported the economies of many communities along its length. As early as the 1960s, some canal communities that had lost most of their commercial traffic sought new ways to benefit from the canal and began building local trails on remnants of the old towpath. The first public expression of the Canalway Trail concept came with the release of the NYS Canal Recreation Development Plan in the early 1970s. Many sections of the Canalway Trail were constructed during the next two decades.

In 1995, after an intensive three-year effort, the State of New York, under the direction of the NYS Canal Corporation, produced the New York State Canal Recreationway Plan. The plan proposed a revitalization of the Canal System by preserving major historical features, protecting natural settings, enhancing recreational opportunities (trail and water-based), and fostering economic development. The exceptional scenery, history, culture, and natural resources of the canal system and the communities along its shores led the U.S. Congress to designate the Erie Canalway National Heritage Corridor in 2000. The National Heritage Corridor includes the currently operating canal system, its historic alignments, and the immediately adjacent municipalities.

The Erie Canalway National Heritage Corridor, in partnership with the National Park Service, collaborates with government agencies, communities and organizations to protect and promote the canal corridor for all to use and enjoy. The National Heritage Corridor supports community initiatives to preserve significant historic canal sites, celebrate heritage at events and festivals, promote heritage-based tourism and tell the stories of the canal's role in shaping the growth and development of New York State. In 2016, the national significance of the currently operating NYS Canal System was further recognized with its designation as a National Historic Landmark. This distinction marks the New York State Canal System as America's most iconic, influential, and enduring waterway.



In January 2017, New York State announced the creation of the Empire State Trail, a 750-mile bicycle and walking trail that spans New York State, from Buffalo to Albany, and from New York City through the Hudson and Champlain Valleys to Canada. The project incorporates existing trails, including the Erie Canalway Trail, and provided \$200 million for the construction of additional trails and enhancements to existing trails. Now consistent wayfinding signage for the Empire State Trail can be found along the entire length of the Erie Canalway Trail, along with improved gateways and access points that include parking facilities, welcome and orientation signage, picnic tables and benches, and bicycle racks and self-service bicycle “fix-it” stations.



*Boats along the Erie*

### **Village-Trail Investments**

Today, signs of local pride and investment in canal heritage can be seen all along the Erie Canalway Trail. Canal-themed murals, historical parks, interpretive signs, architectural preservation projects on Main Streets, and canal celebrations are just a few of the ways that communities are showcasing their vital connections to the legendary canal. Below are examples of how some of the Erie Canal communities have achieved this by examining their unique heritage and offerings to position themselves relative to the trail and other communities in the region. The towns identified below are geographically listed west to east.



*Canal-themed mural in Port Byron*

### **Lockport**

A friendly community with rich historic roots, the City and Town of Lockport grew out of the busy traffic of the Erie Canal. Just 18 miles from Niagara Falls, USA, Lockport is home to the historic “Flight of Five” locks. The City provides wayfinding and interpretive signage for the locks to draw in trail users and get them to check out the many restaurants, cultural venues, and businesses in this area, including a canal cruise offering.

## Medina

Medina is home to many unique shops and attractions including the Medina Railroad Museum, the largest toy train museum in the country. With beer- and wine-tasting events, farmer's markets and festivals, Medina merchants are making their downtown a popular destination.

## Albion

Historic Downtown Albion and Courthouse Square include several sandstone and cobblestone buildings on the National Registry of Historic Places. Located in Orleans County, Albion also offers bountiful farm markets, charming gift shops, and unique museums.

## Brockport

Known as "The Victorian Village on the Erie Canal," Brockport was incorporated in 1829, just four years after the Erie Canal was built. With a pedestrian-friendly downtown, bustling with small shops and restaurants, the village prides itself on public art. With nine public parks, Brockport is also home to the College at Brockport, State University of New York. Brockport also includes the Canalfront Welcome Center, staffed by volunteers who greet Erie Canal boaters and cyclists.

## Pittsford

Located eight miles southeast of Rochester, the historic Village of Pittsford is an active commercial hub with charm, character, and lots of shopping opportunities, including art, antiques, jewelry, home décor and gifts. Pittsford has developed a canal shopping district with a wide range of businesses that are visible and accessible from the trail.

## Palmyra

Named after an ancient city in Syria, Palmyra is located in Wayne County approximately 20 miles southeast of Rochester. The Palmyra Temple is regarded as a sacred place by the members of The Church of Jesus Christ of Latter-day Saints, since it overlooks the Sacred Grove where the religion's founder, Joseph Smith, had the "First Vision." Museums, historic sites, festivals and entertainment are just a few things the "Queen of Canal Towns" has to offer

## Camillus

The town of Camillus is steeped in history and the Camillus Historical Society is committed to preserving and interpreting this history. Notable sites include the Sims Store Museum, a re-created Erie Canal store, the fully restored 19<sup>th</sup> century Nine Mile Creek Aqueduct in Erie Canal Park, the Martisco Railway Museum and the Octagon House.



*Cyclists visiting a restaurant in Medina*



*Downtown Albion, NY*



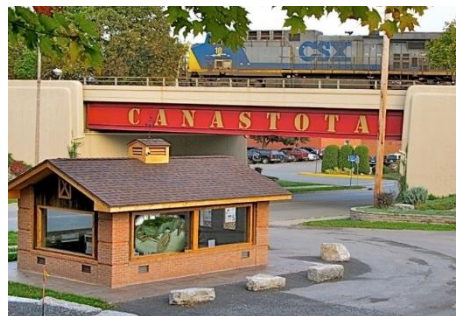
*Cyclists visiting the Sims Store Museum*

## Chittenango

Chittenango is home to L. Frank Baum, author of the Wonderful Wizard of Oz. Every year in June the town celebrates its famous native son with Oz-stravaganza, a week-long celebration of all things Oz. But any time of year you can take a walk on the yellow brick road on Genesee St, visit the Chittenango Landing Canal Boat Museum or check out the breathtaking 167-foot waterfall Chittenango Falls State Park.

## Canastota

The village of Canastota is home to the International Boxing Hall of Fame, making it a must see for sports enthusiasts. When you're in town, you can also visit the Canastota Canal Town Museum and take an excursion to see the newly restored 80-foot lighthouse at Verona Beach, located 9 miles north of Canastota.



*Canastota, NY*

## Oneida

Halfway between Syracuse and Utica, Oneida was the site of one of the most interesting experiments in alternative living during the 19<sup>th</sup> century. The Oneida Community was a religious community that practiced communalism, meaning there was no private property or possessions or individual marriages. Today, visitors can tour the sprawling Mansion House, a National Historic Landmark, that was the heart of the Community.

## Rome

Nestled into the foothills of the Adirondacks in central New York, Rome has played a major historical role in the state as a key transportation hub. Key attractions include the Fort Stanwix National Monument, the Erie Canal Village, Sears Oil Co. Museum, and the Oriskany Monument. Rome also promotes its well-known local fare—Chicken Riggies and Greens Romano.



*Fort Stanwix in Rome, NY*

## Utica

Due to its central location on the Erie Canal, Utica quickly became a key commercial hub. While visiting this friendly upstate city, you can enjoy fine arts at The Munson-Williams-Proctor Arts Institute or take a tour and tasting at the Saranac Brewery, family-owned since 1888. Family-friendly attractions include vintage excursion trains to the southern Adirondacks, the Children's Museum of History, Science and Technology, and the Utica Zoo. Local food favorites include Utica Riggies, spicy escarole, half-moon cookies, and tomato pie.

## Little Falls

Little Falls combines quintessential small-town life with modern day amenities. Situated within a deep gorge at the narrowest part of the Mohawk Valley, visitors will find scenic views, outdoor activities, a wide variety of restaurants and shops, and happenings for the whole family. The community also contains Moss Island, a National Natural Landmark.



*Dummy light and historic downtown Canajoharie*



## Canajoharie

Canajoharie is a small town located between Utica and Amsterdam. The village features an operating “dummy-light,” a traffic signal pedestal dating back to 1926. The Canajoharie Historic District includes many buildings on the National Register for Historic Places that display different architectural eras. A trip to Canajoharie would not be complete without a stop at the impressive Arkell Museum, which contains notable American landscapes and works by Winslow Homer.

### TENTRR BUSINESS EXAMPLE

Tentrr is a unique lodging business opportunity for private landowners looking for ways to earn income from their property. Often referred to as the “camping equivalent of Airbnb,” the site allows users to book stays at more than one thousand properties in 43 states. Tentrr will deliver and install a turnkey “Signature CampKit” that provide fully-furnished “glamping” campsites with campers only needing to bring food and bedding. Landowners earn 80% of nightly rates, which average at \$135/night across the country.



*Tentrr Standard Glamping Site*

### MVRT TRAIL FRIENDLY BUSINESS PROGRAM

With its bucolic setting, quiet river nooks, booming mountain views, and quintessential Vermont villages, the Missisquoi Valley Rail Trail is an amazing resource for Franklin County and the surrounding region. The trail provides a great amenity for the communities along it, but it also brings in visitors from outside the area to recreate and spend tourism dollars in the Missisquoi Valley. The Missisquoi Valley Trail Friendly Business Program has been developed to better reach these potential visitors and entice them to spend more time—and money!—in the area. The free Trail Friendly Business Program was rolled out alongside new branding, wayfinding, and marketing strategies for the trail. These elements are all designed to work together to drive more visitation to the trail.



[www.mvrailtrail.org](http://www.mvrailtrail.org)

The Missisquoi Valley Trail Friendly Business Program highlights local businesses that cater to the needs of walkers, runners, hikers, bikers, skiers, snowmobilers, mushers (dog sledders), and well... EVERYONE who uses the trail.

The Trail Friendly Business Program’s main objectives are to:

- Reach potential trail visitors with an online interactive map and a hard copy local business brochure that is available at the trail’s new trail kiosks at each community/trailhead. The map and brochures highlight trail friendly businesses and help trail users find the services and businesses they desire while on the trail.
- Provide each participating business with a trail friendly business window cling that helps signal to trail users when they have arrived at each location.

- Provide tools and resources to participating businesses to help them attract trail visitors.

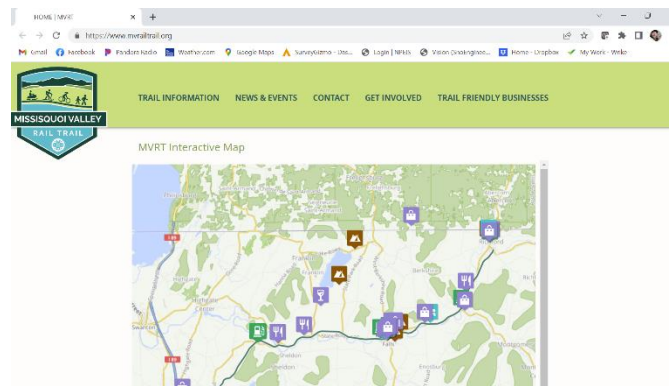
## Who Can Participate?

The program is offered completely free of charge. For a business to participate, they must be a business with a physical location near the trail corridor and are open to the general public.

The types of businesses that can participate are:

- Lodging: hotels, motels, bed and breakfasts, campgrounds, etc.
- Retail: general stores, markets, gas stations, bike shops, outdoor shops, clothing stores, galleries, etc.
- Food and Drink: restaurants, coffee shops, breweries, wineries, etc.
- Guiding Services: river tours, fishing guides, etc.
- Other Trail User Services and Offerings: shuttle service, bike rental, museums, etc.

Participating businesses work hard to create a trail friendly atmosphere that welcomes outdoor enthusiasts. These businesses understand what trail users need and take extra steps to make sure they have a great experience. The businesses are included on the trail's ([www.mvrailtrail.org](http://www.mvrailtrail.org)) and trail users can also find local business directories at the trail kiosks in each town and identify participating businesses by the Trail Friendly Business Logo posted in the window.



*MVRT Interactive Map*

## Requirements and Recommendations

Because the program is focused on enticing visitors to stay overnight along the trail, the program asks that lodging/camping properties provide a few specific amenities:

- A secure parking area for bikes (allowed inside the room or inside a secure storage room)
- If providing camping, a dedicated camping area for people who arrive by bike without reservation

For restaurants and retail, a list of other recommended services is provided:

- Designated bike parking area (bike rack, secure courtyard)
- Designated snowmobile parking during the winter

- Water refills for trail users
- Shipping for purchases
- Basic tools for bike repair (pump, spare tubes, snowmobile repair)
- Energy bars or boxed meals for trail users
- Cell phone charging station/wifi
- Restroom(s)
- Maps and other tourist-related information

The MVRT Trail Friendly Business Program also provided a business checklist, which offers an easy-to-use tool for assessing how trail friendly your business is today, and for identifying steps to make trail users feel most welcome in the future. It is recommended businesses utilize this checklist to audit their current operations.

### **How to Get Recognized as a Trail Friendly Business**

Businesses need to follow these three simple steps:

Step 1: Know the program requirements and recommendations and utilize the Trail Friendly Business Checklist to identify ways your business could be more trail friendly.

Step 2: Fill out and submit the program questionnaire to provide us with the details about your business for the interactive map and trail friendly business brochure. Click [HERE](#) to complete the program questionnaire.

Step 3: Obtain your MVTFB window cling and program materials.



*Business directories and maps at kiosks*



*Trail Friendly Business with Window Cling*

## MVRT TRAIL PASSPORT PROGRAM

The MVRT Passport is a way to “gamify” the trail experience and encourage youth to explore the trail and their surroundings with a fun activity.

The MVRT passport program encourages families and friends to get outside and actively engage with the MVRT by collecting a rubbing of the site badge found at each of the six trailhead kiosks along the trail and make observations about what they saw along that segment:

- St. Albans
- Greens Corners
- Sheldon Junction
- Kane Road
- Enosburg Falls
- Richford



*MVRT Trail Passport Rubbing*

To complete the Passport participants should:

1. Bring along a crayon or pencil to create a rubbing of the trail badge
2. Locate the badge on the kiosk near the sign in box
3. Take a rubbing of the badge on the passport page for that location
4. Create a drawing or make a note of your observations along the trail
5. Continue exploring the MVRT!

The Marketing, Branding and Wayfinding Project produced an initial run of 100 passports for the MVRT in 2020. This initial run has supported a pilot program using the passports and in the future more passports will be produced to use with kids of a specific grade at one of the local schools or with kids and friends in a summer camp or other program. While the rubbings are a fun activity on their own, partnerships with local schools and other programs are critical for delivering the full passport experience with recognition or prizes for completing all the rubbings.



*MVRT Trail Passport rubbing plate at Greens Corners*



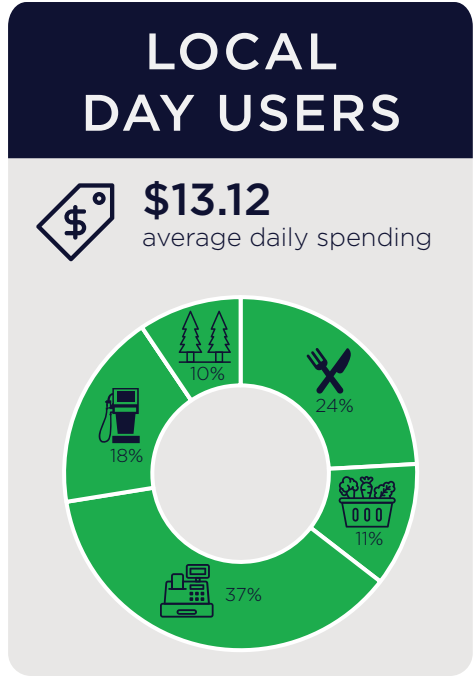
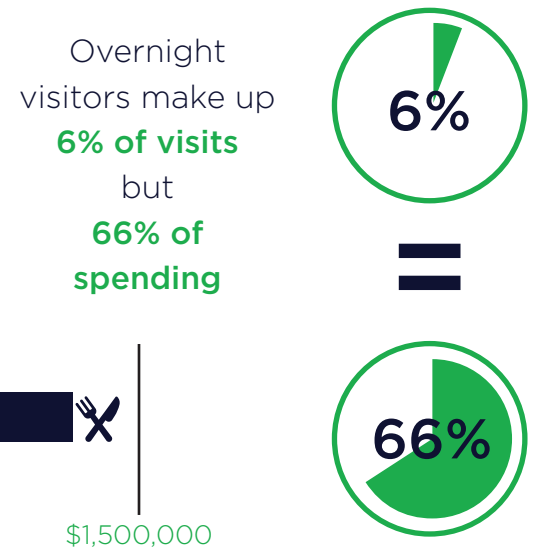
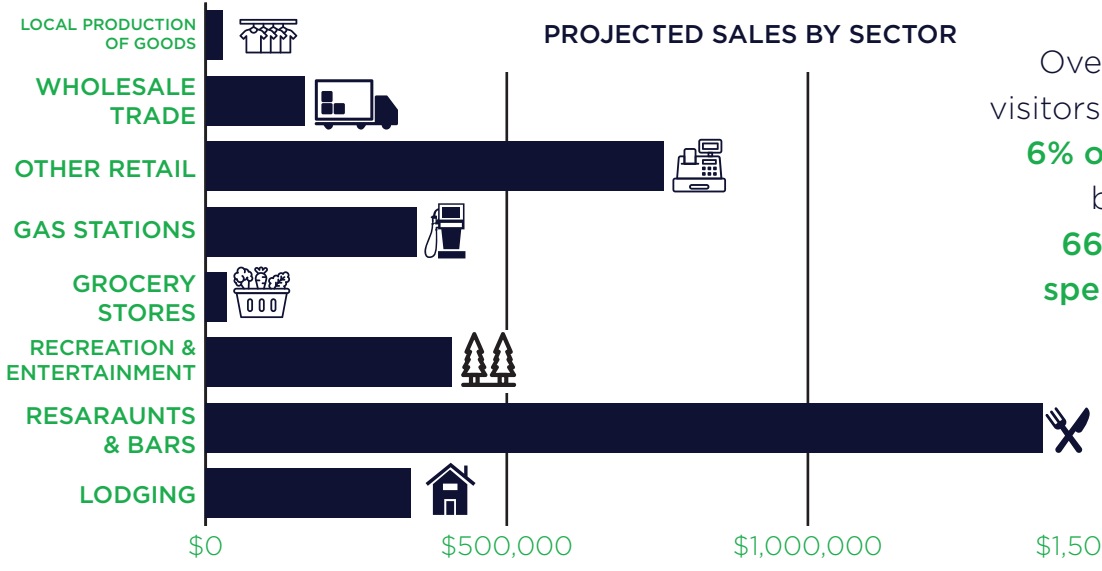
*MVRT Trail Passport*



# FUTURE ECONOMIC IMPACT POTENTIAL

# CALENDONIA COUNTY

To achieve the full economic impact potential of the trail, it must be widely and effectively promoted, there must be substantial investments in community connectivity and amenities, and a significant effort around tourism/camping/lodging development.





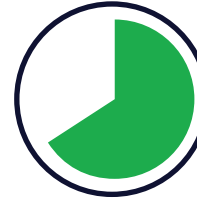
## Average Spending Per Day



**\$160.23** (overnight visitor)

**\$70.52** (non-local day visitor)

**\$13.12** (local day user)



**66%**

of spending from overnight visitors

### BASELINE GROWTH



**135,949**  
annual visits



**\$3,914,000**  
project total annual sales activity



**\$538,000**  
in tax revenues



**63**  
potential full-time equivalent jobs supported

### MODERATE GROWTH



**145,733**  
annual visits



**\$4,196,000**  
project total annual sales activity



**\$576,000**  
in tax revenues



**68**  
potential full-time equivalent jobs supported

### SIGNIFICANT GROWTH



**163,499**  
annual visits



**\$4,707,092**  
project total annual sales activity



**\$646,000**  
in tax revenues



**75.7**  
potential full-time equivalent jobs supported

## TRAIL INVESTMENT

### BASELINE GROWTH

### MODERATE GROWTH

### SIGNIFICANT GROWTH

	BASELINE GROWTH	MODERATE GROWTH	SIGNIFICANT GROWTH
Trail Promotion	◆	◆ ◆	◆ ◆ ◆
Informational Resources	◆	◆ ◆	◆ ◆ ◆
Regional Coordination		◆	◆ ◆ ◆
Community Development Projects		◆	◆ ◆ ◆
Tourism/ Camping/ Lodging Development		◆	◆ ◆ ◆

## GROWTH ASSUMPTIONS

**10%** increase in local users

**10%** increase in non-local day visitors

**10%** increase in non-local overnight visitors

**15%** increase in local users

**25%** increase in non-local day visitors

**25%** increase in non-local overnight visitors

**25%** increase in local users

**50%** increase in non-local day visitors

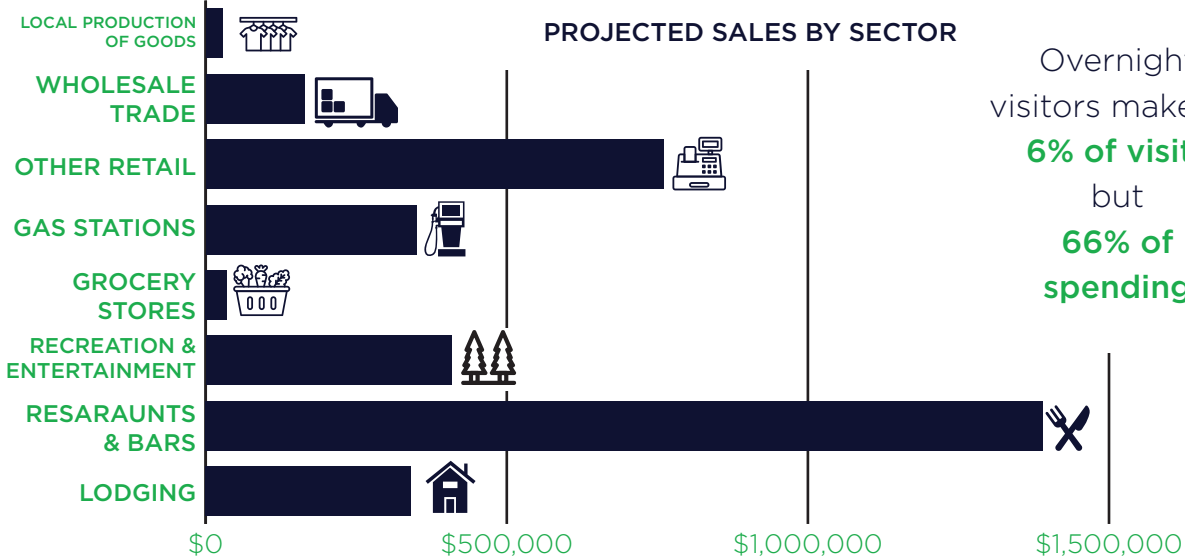
**50%** increase in non-local overnight visitors



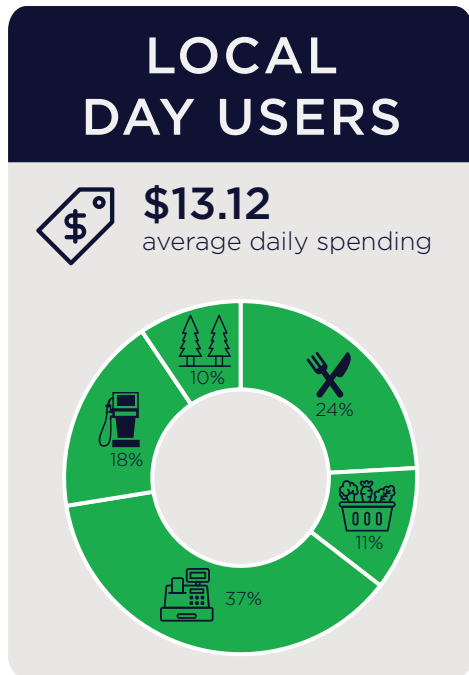
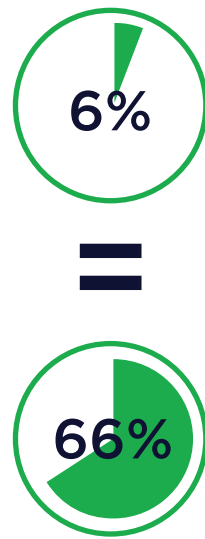
# FUTURE ECONOMIC IMPACT POTENTIAL

# SEGEMENT: ST. JOHNSBURY TO JOE'S POND

To achieve the full economic impact potential of the trail, it must be widely and effectively promoted, there must be substantial investments in community connectivity and amenities, and a significant effort around tourism/camping/lodging development.



Overnight visitors make up **6% of visits** but **66% of spending**



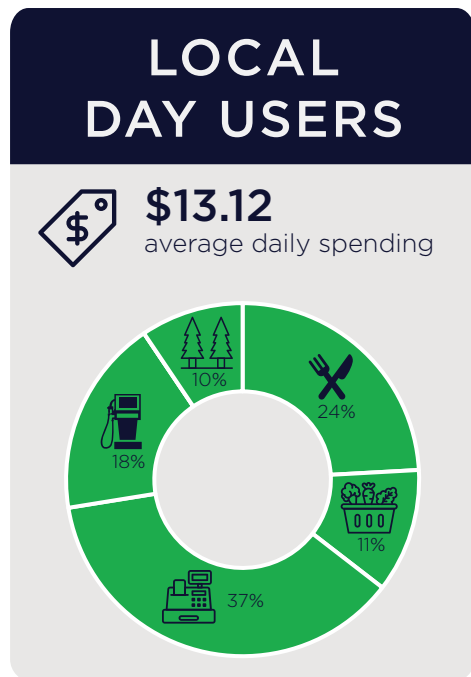
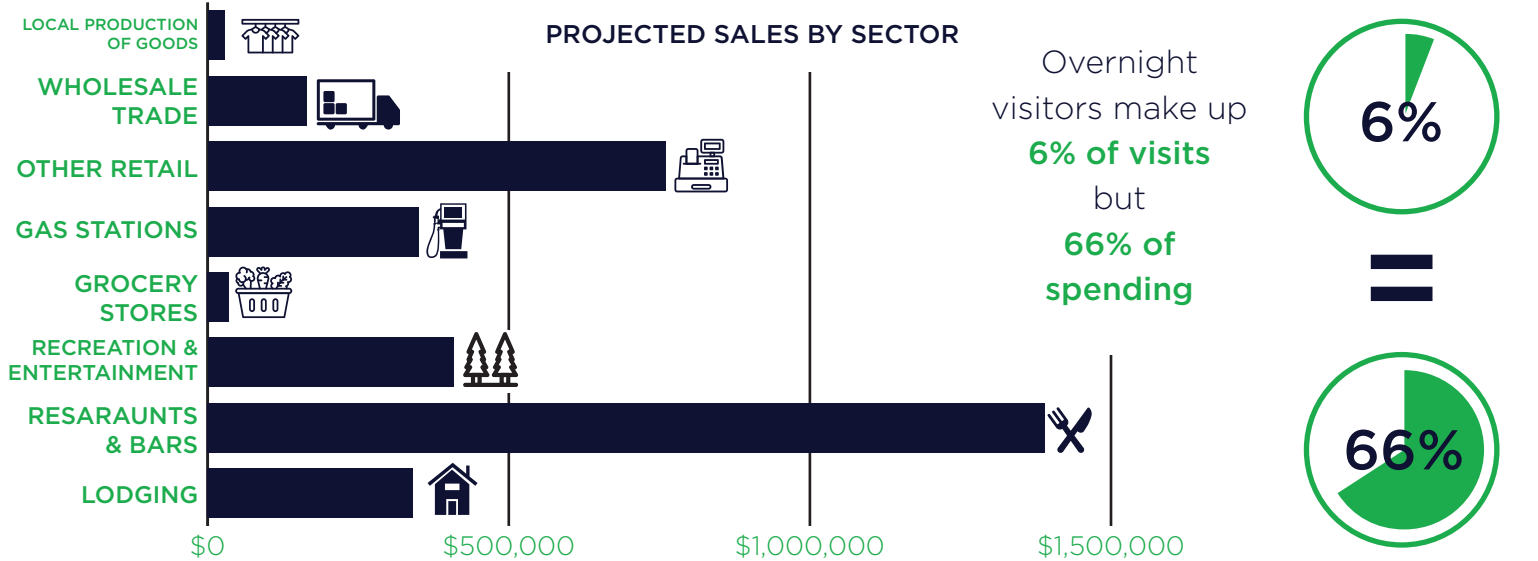




# FUTURE ECONOMIC IMPACT POTENTIAL

# SEGEMENT: JOE'S POND TO GREENSBORO

To achieve the full economic impact potential of the trail, it must be widely and effectively promoted, there must be substantial investments in community connectivity and amenities, and a significant effort around tourism/camping/lodging development.





# FUTURE ECONOMIC IMPACT POTENTIAL

# SEGEMENT: GREENSBORO TO HARDWICK

To achieve the full economic impact potential of the trail, it must be widely and effectively promoted, there must be substantial investments in community connectivity and amenities, and a significant effort around tourism/camping/lodging development.

