

TO: Missisquoi Valley Rail Trail Council
FROM: Drew Pollak-Bruce, SE Group
CC: Greta Brunswick, Northwest Regional Planning Commission
DATE: 9/12/19
RE: DRAFT Missisquoi Valley Rail Trail Market Assessment

This report summarizes information relevant to the market opportunities for the Missisquoi Valley Rail Trail. The information in this draft report is intended to provide perspective on existing bicycling use and tourism in the region. The data and findings presented in this assessment can be used to validate the alignment of marketing and enhancements with existing and/or potential visitation. This report is part of a larger marketing and wayfinding plan being compiled by SE Group and the Path Less Pedaled.

Sources of information for this report include information and data from the Vermont Statewide Comprehensive Outdoor Recreation Plan, the U.S. Census Bureau, Headwaters Economics, Vermont Department of Tourism and Marketing, University of Vermont Transportation Research Center, Statistics Canada, and Outdoor Industry Association, and secondary research on area tourism and outdoor recreation participation.

EXISTING TRAIL USE

A trail user survey for the Missisquoi Valley Rail Trail was conducted in fall 2018. The survey was conducted as part of a larger planning project for the Village of Enosburg Falls but was advertised by broader Vermont recreation organizations as well. The survey was intended for anyone who had used the trail before.

Of survey respondents, 60% were from Franklin County, primarily Enosburg Falls and St. Albans. Enosburg Falls residents were 29% of survey respondents, a high percentage due in part to the enhanced publicity in the village. Chittenden County residents were 25% of respondents. Respondents from elsewhere in Vermont were 12% of all respondents.¹

Biking was the most popular trail activity, followed by walking/hiking and running/jogging. Of trail users, 78% used the trail rarely, a few times a year, or a few times a month. Enosburg residents and residents of other trail communities did use the trail more frequently. Leisure, commuting, and sightseeing were the primary reasons for using the trail.²

The survey results indicate that existing trail users are primarily from Franklin County, with some trail use from Chittenden County and elsewhere in Vermont. Trail users from the local area do use the trail

¹ SE Group, Enosburg Falls Trail User Survey

² Ibid.

somewhat frequently, but those from further afield, Chittenden County and elsewhere in Vermont have used it very rarely.

FRANKLIN COUNTY

The entirety of the Missisquoi Valley Rail Trail is within Franklin County. As the survey above indicates, Franklin County residents are the primary users of the trail, and likely would continue to be in the future. A large proportion of county residents live within a few miles of the trail. The towns that the trail passes through (St. Albans, Swanton, Sheldon, Enosburgh, Berkshire, and Richford) make up 59% of the county's population.³

The county population is 49,421 according to the U.S. Census 2018 Population Estimates. This represents a 3.5% increase since 2010. Comparatively, the state of Vermont's population grew by only 0.1% during that time period.⁴

The state of Vermont develops population growth forecasts under two scenarios. Under the higher growth scenario, the population of Franklin County is expected to reach 55,647 by 2030. Under the low growth scenario, the population is expected to reach 50,739. Based on growth since those projections were done in 2013, the population in 2030 will likely be between those two scenarios.⁵ Franklin County is one of only four counties in Vermont whose population is expected to increase in the next 20 years.⁶

The county trends slightly younger than the state as a whole (median age 39.9 vs. 42.8) and is slightly wealthier (median household income is \$62,214 compared to \$57,808 statewide).⁷

For outdoor recreation participation, age and income are directly correlated to participation levels. A median household income of \$75,000 is an important threshold for participation. Above that, the rate of participation and visitor spending for outdoor recreation dramatically increases. In the county, 40.1% of households earn more than \$75,000 annually. Participation rates in outdoor recreation decline with age. Youth participate in outdoor recreation at the highest rate, adults age 25-44 participate at the next highest rate, and those over 45 participate at the lowest rate.⁸

The Vermont Statewide Comprehensive Outdoor Recreation Plan 2014-18 (SCORP) provided data on outdoor recreation participation by county. In the 2011 survey, Franklin County was roughly in the middle in terms of rate of participation in outdoor recreation. Generally, Franklin County residents' participation for individual activities was in line with the state average, but fishing is popular in the county and residents are slightly less likely to participate in non-motorized activities than Vermont as a whole. Of the rail trail activities, Franklin County residents participate in bicycling (31.1%) at about the statewide average, participate in hiking (30.7%) at somewhat below the statewide average, participate

³ U.S. Census Bureau, 2013-2017 American Community Survey

⁴ U.S. Census Bureau, 2010 Census and 2018 Population Estimates

⁵ State of Vermont, Vermont Population Projections – 2010-2030

⁶ Vermont 2018 Economic Demographic Profile Series

⁷ U.S. Census Bureau, 2013-2017 American Community Survey

⁸ Outdoor Foundation, 2018 Outdoor Participation Report

in walking (56.0%) in line with the state average, and participate in snowmobiling (19.2%) above the state average.⁹

Tourism and the Economy of Franklin County

At present, Franklin County sees fairly limited tourism relative to the rest of Vermont. In terms of percent of county employment in tourism and of second homes, common measures of tourism, Franklin County is below the statewide average. An estimated 12.5% of the county's employment is in tourism, compared to 18.7% statewide. Of Franklin County housing units, 9.4% are second homes (listed as under season, recreational, or occasional use), compared to 15% statewide.¹⁰ Total employment in tourism has grown slightly in the past few decades, but remained a similar percentage of the county's overall economy.

Monthly unemployment rates can show the influence of seasonal tourism. In Franklin County, there is minimal monthly fluctuation and the rate follows the national trend.¹¹ This further demonstrates the limited impact of tourism on the economy and that there is not a strong tourism season.

Existing tourism in Franklin County is largely centered on St. Albans, Lake Champlain, and Lake Carmi State Park. Tourists include day visitors from Chittenden County visiting St. Albans or the Missisquoi National Wildlife Refuge or visitors from elsewhere in the state, participating in water-based recreation or other outdoor recreation at the region's state parks and on the lakes.

Agriculture is a key component of the culture and the economy of Franklin County. Franklin County is one of the top producing agricultural counties in the state. Franklin County has 736 farms and the second most farm acreage of any county in the state. Franklin County is the largest producer of maple syrup in the state and one of the largest producers of dairy as well.¹²

CHITTENDEN COUNTY

Chittenden County is the largest county in Vermont and a key existing and potential future user base for the Missisquoi Valley Rail Trail. Its population center, Burlington, is about a 35-minute drive from the start of the trail in St. Albans.

As of 2018 population estimates, Chittenden County has 164,572 residents. The population has grown by 5.1% since the 2010 Census, making it the fastest growing county in the state.¹³ This recent growth has already exceeded the state's low-end 2030 population projections for the county. If the county continues to grow at the same rate, it will likely exceed 170,000 residents by 2030.¹⁴

Chittenden County's population is younger and has slightly higher incomes compared to the rest of state. The median age of Chittenden County is 36.6 and the median household income is \$66,906.¹⁵

⁹ Vermont Statewide Comprehensive Outdoor Recreation Plan (SCORP) 2014-2018

¹⁰ U.S. Census Bureau, 2010 Census

¹¹ Headwaters Economics, A Profile of Industries that Include Travel and Tourism, 2019.

¹² Vermont Economic and Demographic Profile Series 2018

¹³ U.S. Census Bureau 2018 Population Estimates and 2010 Census

¹⁴ State of Vermont, Vermont Population Projections – 2010-2030

¹⁵ U.S. Census Bureau, 2013-2017 American Community Survey

Younger populations and higher incomes are typically correlated to higher participation in outdoor recreation.

Trail Users in Chittenden County

The SCORP report and survey provides data on Chittenden County residents' participation in outdoor recreation. Chittenden County is in the bottom third of counties in terms of percentage of active residents. However, the report points out that based on the relative size of its population, it would likely be ranked at the top by number of active residents. Chittenden County residents are less likely to participate in nature related and motorized activities than the rest of the state but generally participate in more active outdoor recreation activities than the state average. Chittenden residents do participate in bicycling well above the state average, with 37.0% of residents participating (compared to 23.1% statewide). Chittenden residents participate in hiking and walking at rates similar to the state average.¹⁶

Chittenden County has a wealth of trail opportunities in its immediate environs. The Burlington Greenway/Island Line Trail is one of the most popular options, as it runs along the Burlington shore of Lake Champlain. The trail use during the week is largely for exercise and commuting but the trail sees lots of use on weekends from residents and visitors recreating and sightseeing.

In 2010, the University of Vermont Transportation Research Center published a report on the Burlington Waterfront Path and Island Line Trail.¹⁷ The report included an observational survey and interviews along the bike path during the summer of 2008. Across multiple locations, the number of trail users on Saturday was nearly double the number recorded on Thursday. Trail users were primarily adults (ages 21-64), especially mid-week. Of the Saturday surveys, about 70% of trail users at the waterfront were adults, with the other age categories (12 and under, 13-20, and 65+) each making up about 10% of the other trail users. At Leddy Park and the Causeway, further down the trail, the percentage of those 65 older was much lower, with a slight decline in youths as well.

The survey also asked trail users where they were visiting from. During the week, around 80% of trail users at Oakledge Park and Leddy Park were from Chittenden County. The waterfront is a popular tourist destination throughout the week and saw about 60% of its weekday use from Chittenden residents. At all locations, the percentage of Chittenden visitors was 12-14% lower on Saturday. As the number of total trail users increases significantly on the weekends, Chittenden residents continue to use the bike path on weekends but are joined by many in-state and domestic visitors.

At the waterfront, Chittenden residents were about 50% of all trail users on the Saturday. Almost 14% of waterfront Saturday trail users were from elsewhere in Vermont and nearly all were day visitors, suggesting many were likely from elsewhere in northern Vermont as well. Most of the remaining visitors (31%) were from elsewhere in the U.S. Of those visitors, approximately half were staying overnight, meaning many were likely taking a day trip from nearby states or stopping on the trail as they drove through the area.

At Leddy Park, about 2.5 miles north on the trail from the waterfront, about 60% of Saturday visitors were from Chittenden County. Again, nearly all in-state trail users (11.4% of trail users) were day

¹⁶ Vermont Statewide Comprehensive Outdoor Recreation Plan (SCORP) 2014-2018

¹⁷ Estimating Tourism Expenditures for the Burlington Waterfront Path and the Island Line Trail, University of Vermont Transportation Research Center, 2010

visitors, suggesting these users were primarily from Northern Vermont. Many users from elsewhere in the United States did ride down the trail from the waterfront, making up almost 20% of users at Leddy Park. Similar to the waterfront, about half of those visitors were overnight visitors, while many were day visitors passing through or from nearby states.

The high number of trail users from Chittenden County and elsewhere in Vermont is promising for the MVRT. Given the trail's length and limited attractions along it at present, it is unlikely to draw heavily from outside the state of Vermont. However, trail users in Chittenden and northern Vermont are a potential market for the MVRT, as they look to experience new trails and experiences, and less crowding, within an easy drive.¹⁸

Chittenden County Tourism

As evidenced by the Burlington Waterfront Path and Island Line Trail report, there are many tourists visiting Burlington and interested in recreational opportunities. Burlington and Chittenden County are not a highly tourism-oriented region, but act as a gateway to the rest of the state and increasingly, a basecamp for day trips from the city.

Burlington and Chittenden County currently see a modest amount of tourism but are working to draw more visitors to the area. In 2017, tourist spending generated \$481 million in Chittenden County, about 17% of the state's total tourism revenue; Chittenden County makes up a much larger portion of the state's overall economy.¹⁹ Currently, 16.1% of the county's employment is in travel and tourism, up from 12% in 2000. Comparatively, 18.1% of the state's employment is in travel and tourism, but Chittenden's tourism employment has grown at a higher rate than that of the state.²⁰ Burlington's economy is less seasonal than other parts of the state, but summer is the high season for visitor spending.²¹

Many of the state's visitors choose to stay in Burlington for some or all of their stay. Chittenden County's hotel occupancy rate (74.3%) is well above the statewide average (61.8%), and many new hotels are going up in Burlington as the occupancy rate has climbed in recent years.²² There are some concerns that supply will soon exceed demand, but the city and local chamber of commerce are working to draw additional tourism to Burlington.

The Lake Champlain Valley Chamber of Commerce recently hired a global destination marketing firm to develop a clear and coherent brand messaging for the city and identify potential markets. The project, around growing tourism in Burlington, is intended to have a positive impact across the state. The chamber of commerce has urged the branding to paint Burlington as complementary to the offerings of the rest of the state and an exciting, accessible portal to Vermont.

Visitors to Chittenden County primarily tend to be from the northeast, but the area does see more domestic visitors from elsewhere, likely due to the airport. About 40% of visitors are from New York,

¹⁸ University of Vermont Transportation Research Center, Estimating Tourism Expenditures for the Burlington Waterfront Path and the Island Line Trail.

¹⁹ VTDigger, "Local Chamber hires global firm to update Burlington's image for outsiders," 2019.

²⁰ Headwaters Economics, A Profile of Industries that Include Travel and Tourism, 2019.

²¹ 2017 Benchmark Report Tourism in Vermont, Vermont Agency of Commerce and Community Development

²² Burlington Free Press, "How many hotel rooms can the Burlington market handle?" 2018.

Massachusetts, or New Hampshire, compared to 54% statewide.²³ The Burlington International Airport has direct flights from 13 national airports, from the following major metropolitan areas (NYC, Washington, D.C., Chicago, Denver, Atlanta, Philadelphia, Detroit, and Charlotte). About 40% of the airport's passengers are Quebecois for whom it is cheaper to fly out of the United States than Montreal.²⁴ Passenger boardings at the Burlington airport declined from 2010-2017, but boardings increased significantly in 2018 and are on an upward trajectory through 2019.²⁵

As described above, Burlington has not been a major tourism destination. However, due to its urban setting and airport, many of the state's visitors do pass through the area and regional tourism is growing. The city is working to further its appeal, as a destination in its own right and a fantastic portal to all that Vermont has to offer. The Missisquoi Valley Rail Trail, with its proximity to Burlington, can be integrated in the growing Burlington and Chittenden County area tourism.

CANADIAN DEMOGRAPHICS AND TOURISM

Visitors from Canada are a key component of northern Vermont tourism. Many Canadians cross the border for lower cost goods and to participate in traditional tourism activities. In 2015, about 650,000 Canadians visited Vermont and spent roughly \$152 million in Canadian currency. Of these visitors, about half made a day trip, typically to northern Vermont border counties such as Franklin.²⁶

Canadian visitors to Franklin County are largely from the Montérégie administrative region. The Montérégie region includes communities along the Vermont border. The region extends north up to Sorel, encompassing the Montreal suburbs on the east side of the river. The region has a population of 1.5 million according to the 2016 census.²⁷ However, the region's population is concentrated in the Montreal suburbs, where residents may be less likely to travel to Vermont given the distance and the goods, services, and activities available in the immediate vicinity.

The Brome-Missisquoi Regional County Municipality (RCM) borders Franklin County immediately to the north. It is rural and one of the least dense RCMs in the region, with a population of 58,314 as of the 2016 census. The population did increase from the 2011 to the 2016 census by 4.8%, a slightly higher rate of growth than Franklin County and Quebec as a whole. Brome-Missisquoi is an older area, with a median age of 48.4. The median household income in 2015 was 57,801 Canadian dollars, or 44,122 U.S. dollars, at 1.31 Canadian dollars to the U.S. dollar.²⁸ Brome-Missisquoi's relatively low income and older population suggests lower participation in outdoor recreation, according to U.S. and Canadian trends.²⁹

The Memphremagog RCM is due north of Jay, to the east of Franklin County. It is a very rural county as well, although it does extend north to the Sherbrooke suburbs. Mt. Orford National Park is within the

²³ 2017 Benchmark Report Tourism in Vermont, Vermont Agency of Commerce and Community Development

²⁴ Seven Days, "Taking Off: Plattsburgh Airport is Drawing more Flights, Travelers," 2015.

²⁵ Seven Days, "BTV Takes Off: Larger Planes Usher in Competition, More Travelers," 2019.

²⁶ Tourism in Vermont 2015 Benchmark Report, Vermont Agency of Commerce and Community Development.

²⁷ Statistics Canada, Census Profile 2016 Census

²⁸ Ibid. Exchange rate on July 22, 2019.

²⁹ Limited outdoor recreation participation data was available for Canada. Canadian participation in outdoor recreation activities close to home does increase with household income. Share of Households Participating in Outdoor Activities Close to Home in Canada in 2015, by income.

RCM and includes over 15 miles of bike paths. The demographics of the RCM are similar to Brome-Missisquoi. The population at the 2016 census was 50,415, a growth of 3.8% from the 2011 census. The median age is 51.6 and the median household income in 2015 was 58,045 Canadian dollars, or 44,309 U.S. dollars at 1.31 Canadian dollars to a U.S. dollar.

Tourism visits from Canadians have declined significantly in recent years. The \$152 million spent in 2015 was down from \$182 million in 2013.³⁰ Based on hotel room nights and anecdotal evidence from local chambers of commerce, it is presumed that Canadian tourism has declined further since 2015, due to the currency exchange rate and additional hassle at the border.³¹

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.³² 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 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.³³

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.³⁴

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.³⁵

³⁰ Tourism in Vermont 2015 Benchmark Report, Vermont Agency of Commerce and Community Development.

³¹ My Champlain Valley, Why There are Fewer Canadian tourists in Vermont this Year, 2018

³² Tourism in Vermont 2015 Benchmark Report, Vermont Agency of Commerce and Community Development.

³³ 2017 Benchmark Report Tourism in Vermont, Vermont Agency of Commerce and Community Development

³⁴ Vermont Tourism and Recreation Survey, Vermont Tourism Research Center, 2014.

³⁵ Vermont Tourism and Recreation Survey, Vermont Tourism Research Center, 2014.

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.³⁶ 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).³⁷ 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 Missisquoi Valley Rail Trail.

Vermont Snowmobiling

The Vermont Association of Snow Travelers (VAST) and the Statewide Snowmobile Trail System (SSTS), of which the MVRT 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 \$150,000) of the monies that flow into the Vermont Recreation Trails Fund gets passed to VAST through FPR.³⁸

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 famers and supporting the industry.³⁹ 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.⁴⁰ Agritourism is both a

³⁶ Resource Systems Group, Economic Impact of Walking and Biking in Vermont, 2012.

³⁷ Resource Systems Group, Economic Impact of Walking and Biking in Vermont, 2012.

³⁸ Vermont Statewide Comprehensive Outdoor Recreation Plan (SCORP) 2014-2018

³⁹ Vermont Public Radio, "Food's Changing Role in Tourism and what it means for the State," 2018

⁴⁰ Vermont Tourism Research Center, Vermont Agri-Tourism Survey, 2004

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.⁴¹

Guided Vermont food tours largely do not occur in Franklin County, based on existing food destinations and convenience to the origin of many Vermont tourists (Boston, New York). However, many of these trips do include or focus on Burlington area or Northeast Kingdom food producers, in close proximity to Franklin County.

According to research on what food tourists are looking for, authenticity, rural landscapes, and true local culture are of high interest. In Franklin County, where farms dominate the landscape, there may be an opportunity to capture some of this growing agritourism market and connect it with what is happening on the MVRT.

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.⁴² 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.⁴³

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 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.⁴⁴

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 MVRT). More experienced cyclists are looking for longer rides and longer trips, typically on roads.⁴⁵

The Heritage Rail Trail, in Central Pennsylvania, has a similar profile to the Missisquoi Valley Rail Trail in terms of length and rural setting and offers access to historical sites and information. Its survey data offers a benchmark for the Missisquoi 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

⁴¹ Vermont Public Radio, “Food’s Changing Role in Tourism and what it means for the State,” 2018

⁴² Outdoor Industry Association, 2017 National Recreation Economy

⁴³ Resource Systems Group, Economic Impact of Walking and Biking in Vermont, 2012.

⁴⁴ Wilbur Smith Associates, Bicycle Tourism in Maine: Economic Impacts and Marketing, 2001.

⁴⁵ Ibid.

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.⁴⁶

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.⁴⁷

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.⁴⁸

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.⁴⁹

There are 3000+ snowmobile clubs worldwide, involved in trail grooming, charity fund raising, & family activities.⁵⁰

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 MVRT.

⁴⁶ Rails to Trails Conservancy, Heritage Rail Trail County Park 2012 User Survey and Economic Impact Study.

⁴⁷ International Snowmobile Manufacturers Association, 2018 Snowmobiling Fact Book.

⁴⁸ Ibid

⁴⁹ Ibid

⁵⁰ Ibid