

NORTHERN FOREST CANOE TRAIL

Trails and Economic Development Report



Prepared by



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1.0 Executive Summary

How do trails create economic benefits? Rural communities across the Northern Forest are increasingly making investments in regional trail networks and supporting visitor services. A growing body of data and literature document the meaningful economic impacts these efforts have in the regional economy. President Obama’s recent America’s Great Outdoors report has also prioritized the goal of stimulating job growth through recreation. As stated in the report, “*Conservation, restoration, and recreation offer quality job and service opportunities and also spur economic growth for local communities, regions, and the nation as a whole.*”¹

For several years, the Northern Forest Canoe Trail (NFCT) has been working to foster economic development in the communities through which the trail passes. This report summarizes key lessons learned through this effort, supplemented with additional case studies to build a broader understanding of how area trail networks are creating economic benefits. Trails create community economic benefits by:

- **Serving as community amenities** that act as both destinations for visitors and attractions for new residents and businesses, particularly retirees seeking regions rich in recreational opportunities
- **Encouraging local entrepreneurship** by creating new opportunities for area businesses seeking to diversify their offerings
- **Fostering regional destination tourism** by providing long-term strategic planning and management necessary to create broad visitor appeal and ensure careful stewardship
- **Catalyzing collaboration** across rural and widely dispersed populations, increasing a region’s ability to work collectively to develop and market a region’s tourism assets
- **Bringing new visitor spending** that benefits local economies, helping stabilize economic conditions in communities previously reliant on single industries
- **Building community sense of pride and well-being** by providing opportunities for residents to enjoy and preserve their local natural resources

We hope this report will serve as a useful guide to how trails can serve as tools for economic development.

About Water Trails

Water trails are greenways that contain a route with specific access points, campsites, and other lodging opportunities. The National Park Service’s Rivers, Trails and Conservation Assistance program has identified over 200 water trail initiatives¹. Their development has been spurred by a growing interest in water sports. According to the Sporting Goods Manufacturing Association, an estimated 21 million Americans participated in canoeing or kayaking activities in 2011, up nearly 10% from 2009.²



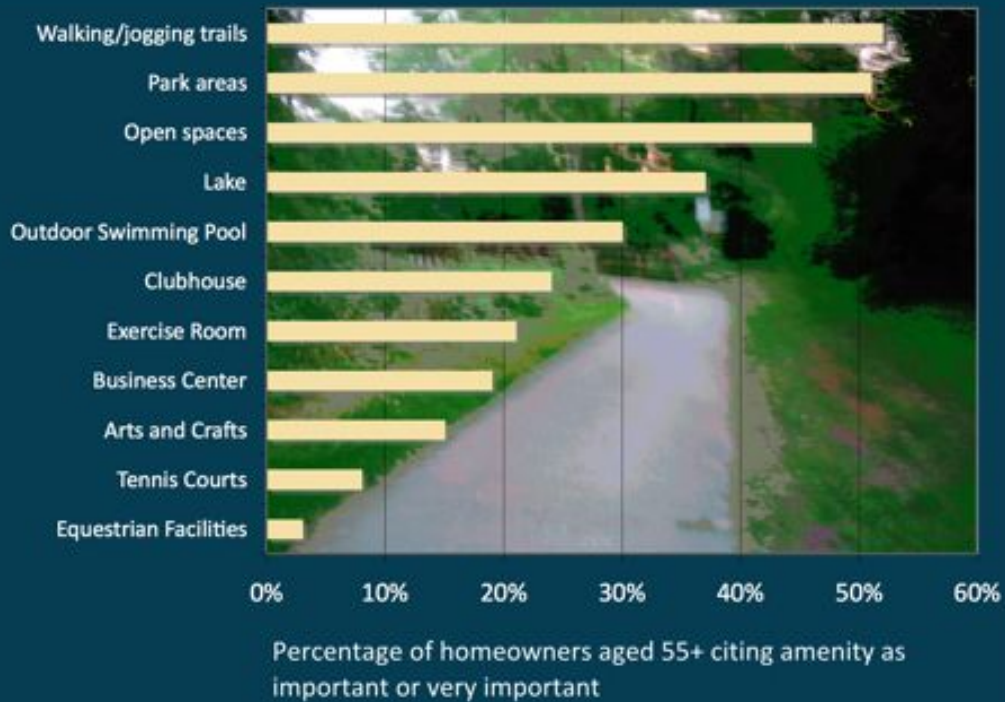
1. Johnson (2002)
2. Martinez, J. (2011)

¹ AGO (2011)

2.0 Trails Serve As Community Amenities

In many communities, trail networks are important community amenities, serving both as destinations for visitors and as tools for attracting new residents and businesses. In fact, across the U.S., communities predominately dependent on manufacturing, mining, energy, and timber are witnessing population declines while amenity rich communities, especially those with well developed trails and other recreational assets, remain resilient². Indeed, recent research suggests that trails are the number one amenity influencing homebuyers aged 55+ (Figure 1), not only the country's fastest growing demographic, but also the one most able to relocate and invest in a new home.³

Figure 1. Amenities Important To Homebuyers Aged 55+



Source: Wylde, M. (2002). Adapted from Morton and Lindal (2011)

² White and Hanink (2004)

³ Anderson, J (2011)

Trail managers have an important role in fostering local infrastructure development and contributing to economic well being in a region. The development of a trail system helps a community to:

- ***Inventory its resources, assess infrastructure needs, and identify opportunities:*** The process of developing a trail system provides communities with an opportunity to take a regional look at area amenities and identify gaps in services and infrastructure. This provides a coordinated and focused approach to developing nature-based recreational assets as a tool for economic development and as a social service for local residents.

- ***Complete projects to develop and maintain new infrastructure:*** Trail systems are an on the ground feature that attracts visitors. These systems are relatively low cost investments that capitalize on a region's natural and scenic resources to provide the activities necessary to attract tourism expenditures. (Case Study 1).

- ***Connect residents and visitors to conserved lands:*** Land conservation is often completed for a variety of reasons focused on the health of the landscape (habitat protection, water source protection, etc.). Increasingly, however, conservation organizations are aware that building connections between people and place into the conservation equation will be critical both for the long term perceived value of conserved parcels, and for the cultivation of the next generation of individuals who will care about protecting natural landscapes as an integral part of vital human and natural communities. Trails are often the thread that can stitch together people and place, as they literally provide the pathway for people to experience conserved parcels.

Case Study 1: NFCT Missisquoi River Access Improvements

NFCT has taken an active role in developing local infrastructure in trail side communities. In 2009, NFCT staff surveyed local communities along Vermont's Missisquoi River to identify priority locations for improving river access. Projects were completed in the towns of Highgate, East Berkshire, and Richford, Vermont. Across the three sites, access improvements included formal parking areas, access and portage trails, primitive campsites, stone and timber staircases, and signage improvements.

Work was carried out by NFCT's stewardship interns, town highway staff, area youth conservation corps, and local volunteers. NFCT interns work closely with volunteers during weekend "Waterway Work Trips," a model encouraging leadership development skills and community building. All of these projects were collaborative efforts. For example, in Highgate, a local ATV association contributed equipment and manpower to improve a section of a portage trail degraded by illegal ATV users.

The improved access areas have opened up new opportunities for paddler-based recreation and tourism in the area, and has added regional amenities which are already helping to both attract visitors to the region and increasing recreational opportunities for local residents.

Thanks to the NFCT's efforts, area businesses report an increase in tourists who now visit the region to make an excursion along the Missisquoi River. As reported by the owners of a bed and breakfast in Richford, Vermont,

"Three years ago, we rarely saw paddlers using the river. Now we are seeing paddlers almost every summer day. It has been good for our business and is good for the community. It is great to see outdoor lovers coming to visit Richford!"¹



1. Green, D., (2011)

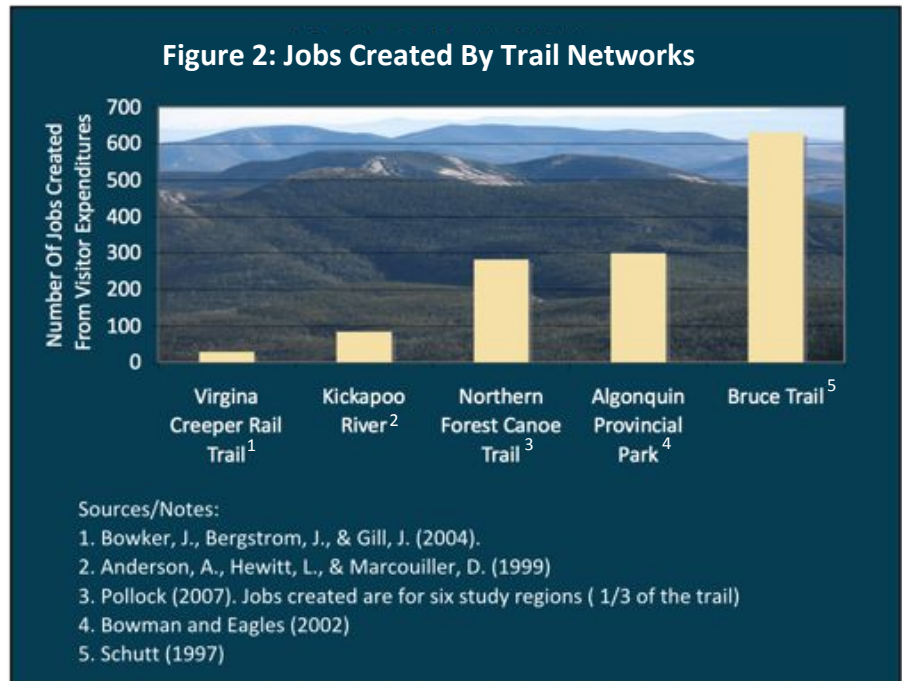
3.0 Trails Encourage Local Entrepreneurship

Trail networks can be an effective tool to encourage small business development and local entrepreneurship.

Trails help attract visitors who then patronize local restaurants, motels, gas stations, and other business. Their expenditures can lead to additional job opportunities in the community and can maintain the profitability of retail stores in a time when rural businesses are being increasingly consolidated.

On a regional basis, given sufficient visitors, the cumulative economic effects of

visitors can add up, particularly in small rural communities (Figure 2). By diversifying the local economic base, recreation development can help stabilize economic conditions in communities previously reliant on single industries.⁴ Trail managers, including the NFCT, have a role to play in helping open up new markets and encourage local entrepreneurs (Case Study 2).



Case Study 2: Clyde River Recreation

In 2008, Chris MacFarland returned to his rural Vermont home town of East Charleston to open Clyde River Recreation, a boat livery service providing shuttling and outfitting services. The NFCT provided important support to this fledgling business by spreading the word in an online database of local businesses, describing the services provided in trip itineraries, and helping connect the business with area lodging providers. Today, Clyde River Recreation serves two rental locations and is putting close to a hundred people on the river on busy summer days. Chris prides himself on providing quality vacation experience at an affordable price – and attributes some of his success to the presence and support of the NFCT.



Photo Credit: Clyde River Recreation

⁴ Blakely and Bradshaw (2002)

⁶ Anderson (2005).

4.0 Trails Foster Regional Destination Tourism

Trail networks help to position a region as a tourism destination. As a marketing opportunity, they create the cachet for a region necessary to foster non-local visitation which, in turn, drives meaningful economic impacts (Case Study 3).⁶ Trails also provide a focal point for the strategic planning, marketing, and management necessary for sustainable tourism development of a regional destination.⁷ Furthermore, they provide a useful framework for engaging area community members, businesses, as well as state and local government agencies in the sustainable development, management and marketing of visitor amenities in the region.⁸

Across the Northern Forest, numerous private, and non-profit organizations, and agencies work independently to develop tourism strategies and attract visitors. However, these initiatives are widely dispersed and often relatively small-scale. To increase their effectiveness, NFCT partners with existing tourism initiatives, encouraging collaborative tourism development and the marketing of a region's recreational opportunities.

NFCT has successfully secured a mix of private, state, and federal funding sources to develop and implement project work. Through this process, NFCT leverages the Trail to increase the inflow of dollars into the region. For example, NFCT has put in place the five-year strategic vision to install or improve a public Trail access point in each of the trailside communities, helping to strengthen the region's reputation as a destination for paddler tourism and recreation.

Along the NFCT, regions serving as destinations for paddler tourism and recreation see tangible economic benefits. For example, a recent study exploring paddler tourism along the NFCT found that approximately 90,000 visitors paddled the waterways in six study regions representing 230 miles of the trail. Their spending in local communities created \$12 million in total economic impacts and supported about 280 jobs.

⁷ Wray et al. (2010)

⁸ Wray et al (2010)

Case Study 3: The Maine Island Trail

In the 1980s, forty state-owned islands in the Gulf of Maine were designated for recreational access as the Maine Island Trail. Today, the Maine Island Trail has become a 375-mile recreational water route with designated campsites and day user areas on over 150 sites, carefully stewarded by the 4,000 member strong Maine Island Trail Association.

The Maine Island Trail is gaining national recognition among paddlers and boaters, who contribute significantly to local economies. A recent study concludes that activity by visitors to the Trail contributes over \$1.75 million per year in spending to Maine's economy, including \$553,000 annually from travelers who otherwise wouldn't have spent money in the state. Collected tax revenues from non-local visitors is particularly high, independently generates more in tax revenues than the state invests in the Trail each year.¹



1. Turkel (2011)

5.0 Trails Catalyze Collaboration

Trails are a valuable tool for catalyzing collaboration across rural and widely dispersed populations.

In areas where non-profit, business, and government agencies tasked with serving and promoting rural regions do so with limited staff and resources, regional trail systems help minimize redundant efforts and help to address shared challenges.

The NFCT is committed to fostering partnerships with public and private groups across the Northern Forest, a region encompassing New York, Vermont, Québec, New Hampshire, and Maine, and is in a unique position to do so given the connective power of our cross-state water trail. The organization's approach includes:

- **Coordination of the Northern Forest Tourism Network:** The Northern Forest Tourism Network is made up by tourism practitioners with a shared interest in improving tourism outcomes in the rural Northern Forest. The Network fosters network building and information sharing by convening an annual conference, publishing a monthly e-newsletter and ongoing blog, and developing shared resources for tourism practitioners. These venues provide opportunities to share solutions, invite dialogue, and build partnerships. The Northern Forest Tourism network has met three times since 2008, and has developed a priority action list focusing on collaborative work toward measurable results in the areas of Research, Workforce Training, and Product Development.
- **Provide Small Business Technical Assistance Trainings:** NFCT works with partner organizations across the region to help provide small business technical assistance trainings tailor to local needs (Case Study 4). For example, the NFCT has worked with local Chamber of Commerce leaders, the New Hampshire Division of Travel and Tourism

Case Study 4: Small Business Trainings

In 2008, few small businesses in northern New Hampshire were actively collaborating to promote the region. To improve tourism outcomes in the region, the “New Hampshire Grand: Grand Resorts, Grand Adventures” initiative was launched. Premised on the idea that the success of each business is intricately linked to the success of the region as a whole, this initiative seeks to build a collaborative spirit among business owners and enable the promotion of a collective and more powerful voice.

The NFCT has played a role in the development of this brand by facilitating a series of workshops and trainings. In 2008, 2009 and 2010, in events held across northern Coos County, presenters shared tools and strategies for developing vacation packages, website design, curb appeal improvements, and social media and collaborative marketing. Training topics were derived from surveys of local small business owners to ensure that the targeted subject areas were both relevant and useful. The trainings offered business owners new skills as well as opportunities to interact with other local entrepreneurs invested improving the overall visitors experience in Coos County.



(NHDTTD), NH Grand and the Women’s Rural Entrepreneurial Network to design and deliver a series of technical assistance trainings for small business owners.

- **Linking Small Businesses with Larger Marketing Entities:** NFCT staff also work closely with small business owners to ensure that they are aware of and fully exploiting existing marketing tools and systems and working collaboratively (Case Study 5). This process also helps to link business owners with limited time and capacity to free marketing campaigns at the county, state and national levels, increasing their visibility exponentially.

Case Study 5: Collaborative Marketing In Milan and Dummer, New Hampshire

In the spring of 2010, a group of small business owners and individuals from the towns of Milan and Dummer, New Hampshire convened a series of meetings to discuss ways to capture the interest and dollars of visitors passing through the Route 16 corridor.

NFCT staff helped ensure business owners were both aware of and actively using the state, county, and local Chamber of Commerce’s existing marketing and promotion structures. Businesses not listed on these websites were given information on how to do so. The group developed a simple brochure listing the businesses and recreational opportunities available to visitors in the area. The brochures were well used by visitors throughout the summer, helping to increase and spread visitor spending. NFCT created a companion travel itinerary offering greater detail about the unique area and posted it on the NFCT website. A vacation package was also designed with three of the businesses from the group to offer visitors a well-organized and convenient way to take advantage of the local assets.

**Portal to
NH North
Woods**



**Milan & Dummer, NH:
A wonderful place to
visit for adventure,
wildlife & more!**

6.0 Trails Bring New Visitor Spending

Trails often traverse regions facing significant economic challenges due fundamental shifts in traditional rural industries. While trends are complex and multi-layered, **it is increasingly recognized that recreation-based tourism can play an important role in the economic recovery of economically depressed regions by attracting visitors.** This revenue can maintain the profitability of businesses in a time when many services in rural areas are increasingly centralized. By diversifying the local economic base, the development of regional trail systems can help stabilize economic conditions in communities previously reliant on single industries (See Case Study 6).⁹

NFCT works in a variety of ways to bring new visitors to the Northern Forest region. Promotional efforts seek to draw visitors to the rural communities along the Trail, informing visitors of services in the area, and facilitating collaboration between business owners. Data from a recently completed survey of trail users¹⁰ suggests that Trail Users spend an average of \$1,100 per trip (\$109 per day), in a range of categories (See Figure 2). The organization's approach to actively foster new visitor spending includes:

- **A website to assist with trip planning:** NFCT's website includes a Trip Planner Tool which offer visitors suggested trips and lists visitor services (lodging, camping, dining, outfitters and guides, and supplies) available in the area. The site reveals the beauty of the landscape in photographs

⁹ Blakely and Bradshaw (2002)

¹⁰ Wauchope (2011)

Case Study 6: Kingdom Trails, Burke, Vermont

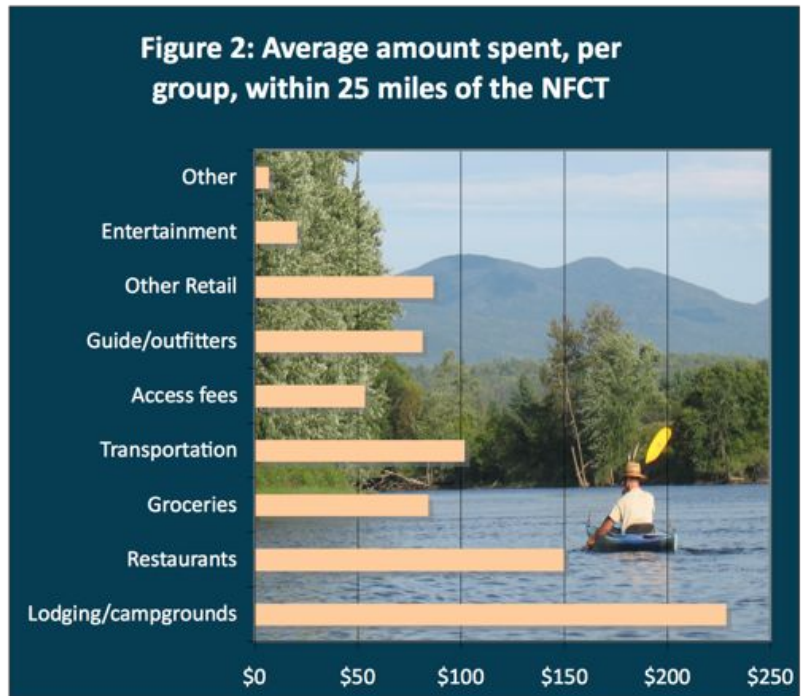
25 years ago, East Burke was a ski-town, with few attractions to draw summer visitors. Now, once the snow melts, the community plays host to over 35,000 visitors who come to cycle the 100-mile network of trails, built primarily on private land, developed by a dedicated group of community members. Today, sunny summer days finds area inns booked and cafes bustling, thanks to an investment in what was recently rated as the best mountain bike trail network in North America. As local entrepreneur Jody Fried explains, ***"It wasn't that long ago that winters were 20 percent busier than summers...now, that's almost totally reversed, and it's not because winter business has dropped; it's because summer business is up."***¹



1. Hewitt (2008)

and video, and promotes local events on social media outlets such as Facebook, Twitter and YouTube. The NFCT blog is also a forum for staff, partners, paddlers and stewardship volunteers to bring the Trail alive with stories of their adventures and work along its 740 miles.

▪ **Development of travel itineraries:** Travel itineraries help to increase the economic impacts of tourist visits by encouraging overnight stays. Research on the economic impact of trail systems indicates that overnight users have a significantly greater impact than day users.¹¹ Research also indicates that the type of accommodations chosen by visitors is an important factor in their economic impact on a community.



NFCT’s travel itineraries, designed with the help and guidance of local residents, and business owners, provide a narrative for suggested trips, noting points of interest from portages to NFCT access points. Links to businesses in the area are also included.¹² NFCT partners with tourism agencies at the county and state level to promote itineraries for the region, and markets them online, through press releases, on social media networks, and in newsletters. A recent evaluation shows that NFCT’s travel itineraries are well received and utilized by trail users and that they encourage new visits to the towns along the Trail. According to the report:

- **31%** of Trail Users surveyed had referred to an NFCT trip itinerary while planning a trip in the last year and 97% to 100% said they were satisfied or very satisfied with the itineraries
- **82%** of those who had used a trip itinerary said they would use one again in the future
- **25%** said the trip was the first time they had visited the NFCT area
- **95%** of the respondents said that knowing about the NFCT organization and website influenced their decision to learn about or to make a trip to the area where the NFCT is located

▪ **The creation of vacation packages:** NFCT works with small business owners to craft and promote vacation packages; a bundle of visitor services with a single, pre-determined cost. The packages generally offer 2-4 day vacations and include lodging, select meals, guide services, NFCT maps and guidebooks and occasionally local products. Some packages use a “dynamic” design, offering visitors the choice between a range of lodging properties and restaurants. NFCT staff members help to oversee communications between partners and package promotion and to design the package write-up. A

¹¹ Moore et al. (1992)

¹² See <http://www.northernforestcanoetrail.org/triplanner/>

Memorandum of Understanding (MOU) is also developed for each package to ensure all partners are aware of their roles and responsibilities. The MOU makes booking and reimbursement more transparent, ensures consistent policies regarding refunds and cancellations, and encourage a high standard of customer service.

The impact NFCT's vacation packages has varied. The Northeast Kingdom Pedal and Paddle Package, launched in the spring of 2010, tallied 31 sales over the summer, yielded more than \$22,000 for the host inn (Case Study 7). While most other packages have not generated as much interest from prospective visitors, they have helped to bringing publicity to the featured businesses and serve as low-cost marketing tools.

Case Study 7: NFCT Pedal and Paddle Package

This package bundles a half-day of paddling on the Clyde River with a day of off-road cycling at Kingdom Trails. It includes choice of lodging in East Burke, picnic lunches, trail passes, maps, shuttle services, and restaurant vouchers. A well timed travel article featuring the package in the Boston Globe helped to reach the package's target audience – visitors seeking to expand planned visits to East Burke to include more than simply mountain biking. The package has been a hit: In its first year, a host inn reported more than \$20,000 in revenue due to the package. A participating outfitter, who saw an additional \$3,000 in sales from both package participants and from referrals from lodging hosts, is now working with other area lodging establishments craft similar partnerships.



7.0 Trails Build Community Sense of Pride and Well-being

There is an important link between the economic vitality of a community and local opportunities for residents to enjoy and preserve their natural resources. In a study assessing differences in social variables between “recreation and non-recreation” counties, researchers found that communities with access to outdoor recreation have lower poverty rates, are healthier, and are more highly educated. In addition to offering free recreational opportunities in safe and easily accessed locations, trails build social capital and connect people to place by giving them opportunities to improve the resource.^{13 14} Stewardship initiatives developed around trail systems offer residents and local businesses opportunities to collaborate and improve their community.¹⁵

The NFCT offers a variety of ways for local people to engage with and preserve the natural resources of their homes. It seeks to:

- **Support festivals and local events:** NFCT staff work to support and promote events related to the area’s waterways (Case Study 8). Events play an important role in developing a sense of collective pride and enthusiasm among local residents. They can also act to draw a wide variety of visitors to an area and generate significant expenditures in local economies. For example, research on the 90 Miler Canoe race, an event held for over fifty years in the Adirondack mountains, indicates that once established, events can be a consistent draw for participants who spend, on average, 75% more than typical paddler group.¹⁶

Case Study 8: NFCT 10th Anniversary Celebration

To celebrate the 10th Anniversary of the NFCT, the NFCT joined forces with the organizers of the Rangeley Logging Museum’s 30th Anniversary celebration. A weekend of activities included guided paddling tours, a woodsmen’s competition and a parade. In addition, the NFCT trail crew worked to build a new portage trail. Visitors came from far and wide to enjoy the festival. Locals were strong supporters of the event, both because of the Festival and portage trail project, but also because of the high caliber, responsible promotion of the region.



¹³ NYPCA (2001)

¹⁴ Johnson (2002)

¹⁵ Anderson et al. (1999)

¹⁶ Pollock (2007)

- **Stewardship programs and waterway work trips:** NFCT's Adopt a Segment program invites local residents to help maintain sections of the Trail. Volunteers identify trail stewardship needs, replace missing or damaged signs, clear portage trails of blowdowns or overgrowth, pick up trash, and maintain paddler campsites. In return, they receive an NFCT membership, map, related trainings and a sense of camaraderie and connection to a community of like minded citizens.
- **Northern Forest Explorers program:** In 2010, the NFCT began providing outdoor programming for rural youth in communities along its 740-mile, multi-state water trail route. The Northern Forest Explorers Program engages rural youth ages 10-14 living in communities along the NFCT in week-long outdoor educational experiences that support active lifestyles, cultivate leadership and teamwork skills, and foster a practical understanding of the natural environment. The program provides rural youth, who often lack the enrichment opportunities available to their urban and suburban counterparts, with an opportunity to develop lasting skills and relationships with their local natural resources.

8.0 Conclusions and Recommendations

The primary goal of this report is to paint a picture that clearly highlights the ways in which trail systems can stimulate economies among rural communities in the Northern Forest. Our research, and NFCT's experience, provides evidence demonstrating that recreation based tourism can positively impact local economies, primarily by fostering infrastructure development, encouraging local entrepreneurship, and catalyzing collaboration. For communities seeking to create economic benefits by creating new trail systems, we recommend embracing a holistic approach to economic development efforts, which includes:

- Engaging a broad range of stakeholders in strategic planning and visioning
- Focusing on creating high quality, accessible opportunities for visitors
- Targeting on-the-ground site improvements in strategic locations able to draw new visitor spending
- Cultivating business partnerships that work for the mutual benefit of all parties
- Working closely with area residents to ensure trail development meets local needs and priorities
- Collaboratively marketing the trail system to a variety of trail users as part of a suite of regional recreational attractions.

All economic development strategies have their challenges and their limitations. However, through targeted strategies and coordinated efforts, trail networks have a clear role to play in stimulating local and regional economies, while also creating healthier and more vibrant communities.

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